



▶ INCLUSIVE
GROWTH
STRATEGY
2019-2040

RESEARCH BASE



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Brent Inclusive Growth Strategy (IGS): Economy

2019-2040

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Executive Summary

Looking forward towards 2040, Brent's growing population creates demand for employment hubs, higher incomes and economic welfare. This report draws out and presents the baseline evidence that characterises the local economy of the area, considers past, present and anticipated future changes and suggests policies and solutions to address the challenges and seize the opportunities in the context of the profound structural changes that have taken place over recent decades, and those which are projected to take effect over the next two decades.

The baseline economic and demographic analysis for Brent reveals:

- Brent is one of the most diverse Local Authorities in the UK, with 330,800 people living in the borough. 45% of Brent residents were born outside of the UK and over 149 languages are spoken. Around 65% of residents are from Black, Asian and Minority Ethnic (BAME) backgrounds and Brent is home to 55,000 EU citizens.
- In 2018, approximately 222,400 people were aged between 16 and 64 years old, and 40,000 residents were over 65 years old; comparing these indicators for both the working age and elder population, Brent had the 7th largest such population amongst the London boroughs
- Brent has the second largest working age non-UK population in London at 138,000 people, and the third largest EU working age population in London at 42,000.
- In 2018, approximately 75.3% of Brent's working age population were economically active, a lower percentage than Outer London, London and the UK.
- 5.3% of Brent's working age population was unemployed, one of the lowest levels in the last decade. Brent's unemployment figure is still significantly higher than London (5%) and the UK (4.2%).
- In 2016, unemployment rates among youth population in Brent were below London and Outer London averages, as was the proportion of 16-18-year-olds currently not in education, employment, or training (NEET).
- In 2018, approximately 93.4% of the working age population held some form of qualification, however, a lower proportion of Brent's population (40.3%) held a degree or a higher qualification than the proportion across London
- Elementary occupations are overrepresented in Brent accounting for over 14% of the working population, compared with only 10% of the UK working population and just under 8.5% of the London working population
- In 2018, median gross weekly earnings for full-time employees in Brent was £575.5, up 3.3% from 2018. This is still well below the average for Outer London (£649.6) and London (£670).
- 62% of Brent's working age population work in professional services. However, analysing the overall working age population in both the construction and manufacturing sectors, Brent residents are over-represented compared with other London boroughs.
- The number of local jobs in Brent has increased at a slightly higher rate than the working age population in the last year, therefore the job density in Brent has risen to 0.71.
- 92% of the 15,030 enterprises in Brent are micro size, with no more than 9 employees.
- Brent has an active silver economy, which brings many economic benefits, and generates income of around £1.78 billion from those in Brent.
- Brent has a lower level of economic activity and higher share of unemployment compared to the rest of London. These factors are especially prevalent among women, who are much more likely than men to drop out of the labour market, and instead stay at home to take care of the house and family.
- Industries related to distribution, transportation, accommodation and food form an important part of Brent's local economy, as do production, wholesale and retail. Simultaneously, poverty, long-term unemployment and adult skills levels remain key

challenges for Brent. Brent has experienced an expansion of its business base that has been close to the growth rate across London, mainly driven by growth in micro-enterprise. Simultaneously, the borough struggles with low real wages, a higher business failure rate and difficulties in finding local skills.

Trends

Looking forward towards 2040, some of the key trends this report addresses include:

- The recent trend of pressure to release industrial land for housing. 16% of London's industrial land was lost over the period 2001-2015, and if that supply trend continues then the industrial land stock in London would fall by 33% by 2041.
- The circular economy is projected to grow, in addition to creating thousands of new jobs for Londoners, a circular economy in London could be worth at least £7 billion every year by 2036 in the built environment, food, textiles, electrical goods and plastics sectors alone.
- 5,000 new self-employed jobs are expected to be created in Brent by 2036. If these projections are confirmed, almost all additional net jobs in the borough will be created through self-employment. This is in line with general trends of a less secure labour market and the rise of the gig economy.
- Brent's town centres face unprecedented challenges, including the need to compete with increasing demand for on-line shopping and competition from other town centres in London, as well as place based concerns regarding the quality of the local public realm and infrastructure.
- Brent's employment is relatively higher in sectors more at risk of technological change and automation.
- Understanding and accounting for potential effects of Brexit on the London and Brent economies is essential when planning 20 years ahead. Of particular relevance is labour and freedom of movement, due to one quarter of the economically active population in Brent coming from the European Union.
- Ageing population and the value of the silver economy to Brent.

Responses

Key responses to the trends noted above include:

- Solutions to loss of industrial land and employment for housing could come in the form of intensification or closer co-location, including redevelopment of current industrial sites for higher density residential and commercial uses where less intrusive activities occur.
- The low carbon Circular Economy model is one major strategic approach promoted to reduce climate change and overconsumption, and to increase business opportunities. The circular economy could be further integrated into the planning for the Wembley Opportunity Area.
- New affordable workspaces for the growing number of self-employed, business start-ups, and smaller enterprises. Workspaces can be organised in clusters in appropriate locations, or as a unified platform or hub at a centralised and accessible area of Brent, to foster communication and collaboration among the resources already existing in the borough.
- If the town centre is to survive, then it must be more than just a place to shop but a community hub and destination where people can meet and socialise. A proactive and ongoing commitment to manage and invest in Brent's town centres is critical to their economic vitality and future.
- With the expected move towards Artificial Intelligence (AI) and automation of jobs between now and 2040, it is imperative that Brent's workforce is equipped with the skills

and training needed to facilitate such a move, and does not become a casualty of technology.

- Brexit uncertainty can encourage more specialisation and enable businesses to take advantage of cheaper exports caused by the depreciation of Sterling.
- Utilize the wealth of skills and resources available in the Silver Economy to help upskill the younger generations.

With slowing demand for office space, growing uncertainty, and anticipated growth in self-employment, this report concludes by recommending the council consider adopting a more flexible development strategy in key areas such as Wembley. In so doing, both office space, higher specialisation of industries, and the circular economy would be accommodated, along with the growing number of micro-enterprises, making the economy of Brent more robust and dynamic when entering a future of uncertainty, faster technological development, and automation.

Poverty, unemployment, and adult skill levels remain key challenges for Brent, as does the low participation of women in the labour market. Brent therefore faces the challenge of promoting growth in employment, especially high-skilled jobs.

Introduction

Situated in the heart of North West London, Brent is committed to playing an important role in the growth of the London economy over the next 20 years. The borough is home to London's largest industrial park at Park Royal and has key employment areas such as Wembley, Alperton, Staples Corner and Burnt Oak/Colindale, with some of these also identified as strategic growth areas that can support increased housing provision.

Brent is currently home to over 15,000 enterprises, who employ more than 130,000 people and generate a Gross Value Added (GVA) to the economy of more than £9 billion. With a diverse and resilient economy, Brent benefits from a broad spectrum of experience and knowledge.

Employment in industries related to distribution, transportation, accommodation and food, as well as in retail, form the largest part of the local economy in Brent. At the same time, poverty, long-term unemployment, and adult skill levels all remain key challenges for Brent, as does the low participation of women in the labour market.

The purpose of this report is to provide understanding on the local economy within the borough by studying the profound structural changes that continue to shape the borough. The report has been broken down into four sub-themes: Employment & Income, Sectors, Skills & Demand, and Business Performance, each of which is analysed in three sections.

- The first section details the Baseline scenario, highlighting the most important economic indicators. To provide an overview of past, present and anticipated future challenges.
- The second section outlines Trends, analysing the projections and trends currently taking place in the borough and the world around it. This section includes an account of potential challenges and opportunities related to Brexit and the referendum, as these events are identified as having the potential to profoundly affect each of the four sub-themes related to the local markets in London.
- The third section proposes Responses, suggesting interventions and policies to encourage economic growth moving forward and that could form part of the Inclusive Growth Strategy for Brent.

Although the four sub-themes are analysed separately, there is considerable overlap and interplay between them. For this reason, the final Responses section of suggested policies seeks to adopt a holistic approach, integrating the different constituent aspects of the local economy where possible.

Baseline – Current Economic Profile

Brent is one of the most diverse Local Authorities in the UK with 330,800 people living in the borough. 45% of Brent residents were born outside of the UK and over 149 languages are spoken in the borough. Around 65% of residents are from Black, Asian and Minority Ethnic (BAME) backgrounds and Brent is home to 55,000 EU citizens.

Figure 1: Demographic Overview

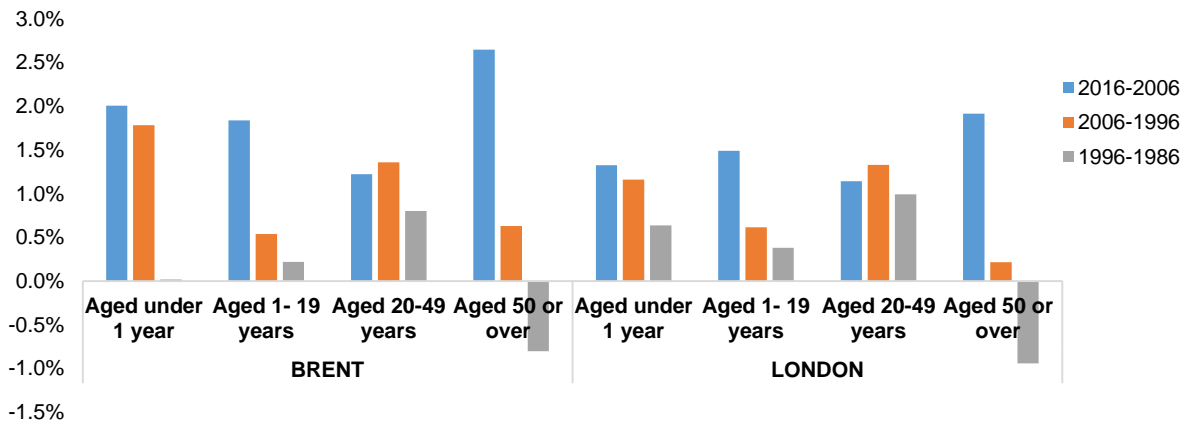
	Brent	Outer London	London
GLA Population Estimate 2018	330,800	5,307,900	8,908,100
GLA Household Estimate 2017	121,048	2,079,422	3,601,963
Inland Area (Hectares)	4,323	125,424	157,215
Population density (per hectare) 2019	79	43	58
Average Age, 2017	35.6	36.9	36
Proportion of population aged 0-15, 2018	21.3%	21.7%	20.6%
Proportion of population of working-age, 2018	66.6%	64.7%	67.5%
Proportion of population aged 65 and over, 2018	12.1%	13.6%	11.9%
Proportion of Non-British of working age, 2016	62%	42%	44%
Proportion of EU population of working age, 2016	19%	13%	14%
Net internal migration (2019)	-6,797	-44,178	-103,230
Net international migration (2015)	7,640	82,685	133,901

Source: GLA Datastore, ONS and Nomis.

Brent's total population has increased by 14% over the past 10 years to 330,800 and it has the 6th largest population amongst the London boroughs. In 2018, approximately 222,400 people were aged between 16 and 64 years old and 40,000 residents were aged over 65 years old. Brent had the 7th largest such population amongst the London boroughs.

Analysing historical population growth rates by age groups over the past 30 years, the population aged 50 years or over have shown the highest growth in the last decade. Comparing these numbers between London and Brent (Figure 2), the Borough has shown significant growth rates in this aged group, which is commonly categorized as the 'silver' or 'grey' economy.

Figure 2: Population growth rate by age groups in Brent and London



Source: NOMIS. Query: Population estimates-local authority based by five-year age band.

Brent has the second largest working age non-UK population in London, at 138,000 people, and the largest EU working age population in the city at 42,000 people. In Brent, around 20% of potential workers are from the EU, 27% from Asia countries and 20% from other countries¹.

In 2016, the main reason for immigration into the UK was for employment purposes particularly from EU citizens. The other main reason for immigration was to join a spouse or dependents, albeit there is no hard evidence that immigrants living in Brent had this reason. According to the last residents' attitude survey in 2018 of Brent's total working population, 37% worked in Brent².

Employment & Income

In 2018, approximately 75% of the working age population of Brent were economically active, a lower percentage than Outer London, London and the UK. Both economic activity, employment and self-employment are more common among men than among women in the borough (Figure 3). More women tend to work on a part-time basis.

Of Brent's economically active population, 5.3% were unemployed. This is one of the lowest levels in the last decade (Figure 4). Brent ranks 7th highest amongst all London boroughs for unemployment rate (Figure 5). The rate of both male and female unemployment is particularly high compared with the UK as a whole (Figure 3).

¹ ONS (2017) Population of the UK by country of birth and nationality January to December 2016. Table 1.2.

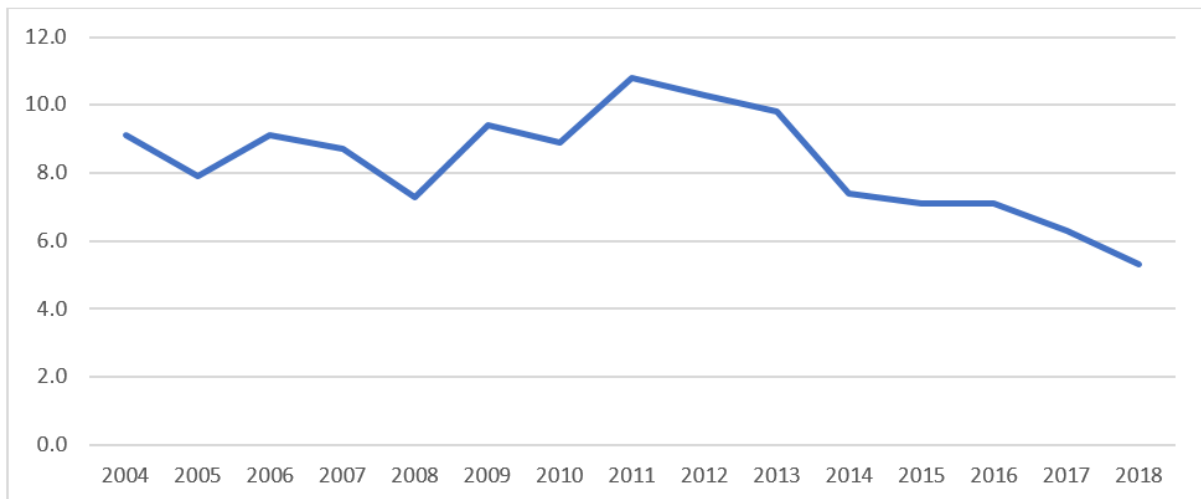
² Brent (2015) Resident's Attitude Survey 2014.

Figure 3: Employment and unemployment working age population 2018

	Brent	Brent	London	Great Britain
	(numbers)	(%)	(%)	(%)
All people				
Economically active†	169,200	75.3	78.2	78.5
In employment†	160,900	71.5	74.3	75.1
Employees†	120,800	54.1	60.6	64.3
Self-employed†	40,100	17.4	13.3	10.6
Unemployed (model-based)§	9,100	5.3	5	4.2
Males				
Economically active†	99,000	84.8	84.6	83.3
In employment†	93,100	79.6	80.5	79.7
Employees†	62,800	54.4	62.8	65.3
Self-employed†	30,300	25.2	17.4	14.1
Unemployed§	5,900	6	4.8	4.2
Females				
Economically active†	70,200	65	71.8	73.7
In employment†	67,800	62.8	68	70.6
Employees†	58,000	53.8	58.4	63.2
Self-employed†	9,800	9	9.3	7.1

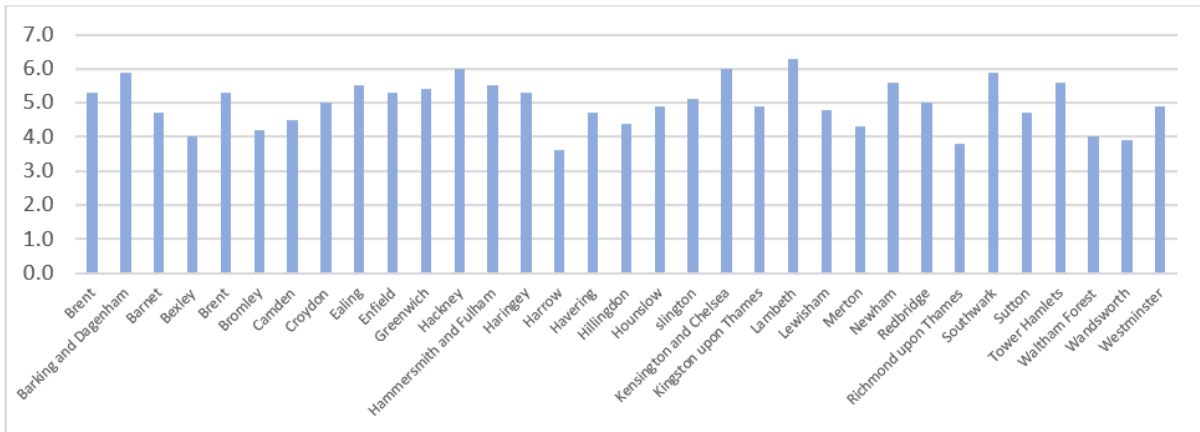
Survey estimates Jan 2018-Dec 2018. Source: ONS annual population survey.

Figure 4: Brent Unemployment Rate



Source: Nomis (2019) model-based estimates of unemployment

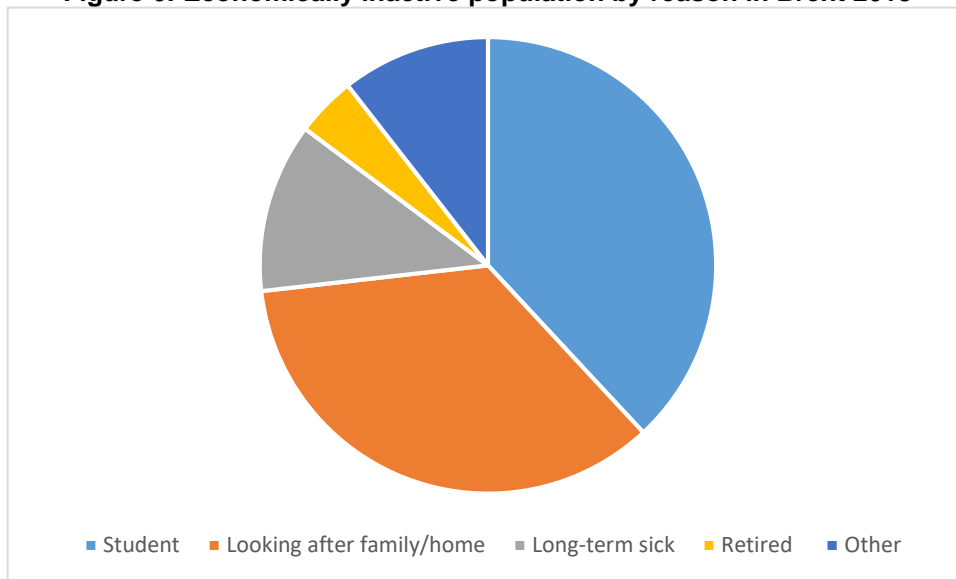
Figure 5: Unemployment rate - aged 16-64 in London, 2018



Source: ONS annual population survey

Economically inactive members of a household could be unavailable for work due to family commitments, retirement or study, or because they are unable to work through sickness or disability. The largest share of the economically inactive population of Brent is the 35% of people looking after family and home, accounting for 19,000 people aged between 16 and 64 (Figure 6).

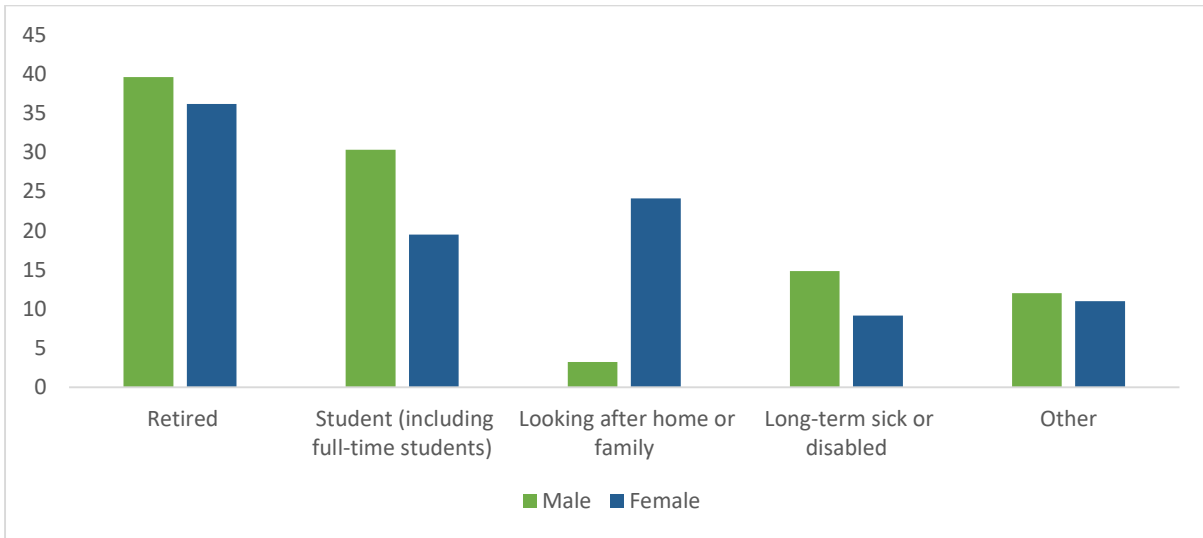
Figure 6: Economically inactive population by reason in Brent 2018



Source: ONS annual population survey 2018

Analysing the economic inactivity by gender in Brent, 14.8% of men are looking for a job compared with 13.4% of women. The reasons for this economic inactivity are quite different by gender, while women tend to not be working due to them staying at home to look after the house and family, men tend to be economically inactive mainly because they are studying (Figure 7).

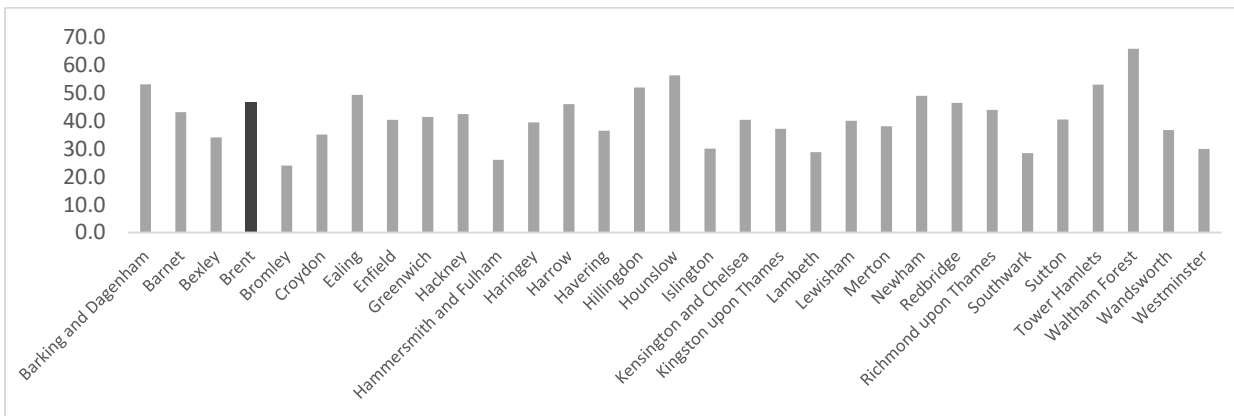
Figure 7: Reasons of economic inactivity by gender in Brent, 2018



Source: ONS annual population survey Jan 2017-Dec 2018.

Brent has the 8th highest percentage of the female population who are looking after the family and home rather than being economically active amongst the London boroughs, as shown in Figure 8. Some of the reasons for this high figure could be linked to the greater ethnic diversity in Brent, as well as factors such as access to affordable childcare, and the gender pay gap which, as Figure 11 shows, adversely affects women in work. These factors could be seen as potential barriers to females entering the workplace and encouraging a higher proportion of the female population to seek employment remains a challenge for the borough.

Figure 8: % of economically inactive female looking after family/home in London 2018



Source: ONS annual population survey 2018.

In 2018, unemployment rates among the youth population in Brent were below London and Outer London averages, as were the proportion of 16-18-year-olds currently not in education, employment, or training (NEET). In 2016, the proportion of the working-age population claiming out-of-work benefits was slightly higher in Brent than in London, but lower than the percentage in the UK. The percentage of the working-age population with a disability was lower in Brent than in both London and the UK (Figure 9).

Figure 9: Labour market indicators for youth and disabled people (%)

Indicator	Brent	Outer London	London	UK
Youth Unemployment (claimant) rate 18-24 (Dec-15)	2.8	3.2	3.3	3.1
Proportion of 16-17 year olds who are NEET (%) (2016)	4.0	5.1	5.3	6.0
Proportion of the working-age population who claim out-of-work benefits (%) (November-2016)	7.8	6.6	7.2	8.4
% working-age with a disability (2016)	15.4	16.6	16.1	19.7

Source: ONS Claimant count, Annual Population Survey; NOMIS; GLA Estimates.

Considering education levels, slightly less residents in Brent have qualifications compared with those in Outer London and London. In 2018, approximately 93% of the working age population held some form of qualification. A lower proportion of Brent's population (40.3%) held a degree or a higher qualification, compared with London as a whole (53.1%), but this is greater than the percentage of those across the UK (39.2%) (Figure 10).

Figure 10: Qualifications 2018

Indicator	Brent	Outer London	London	UK
Proportion of working age people with qualifications	93.4	93.4	93.2	92
Proportion of working age people with no qualifications (%)	6.6	6.6	6.6	8
Proportion of working age with degree or equivalent and above (%)	40.3	47.5	53.1	39.2

Source: ONS Annual Population Survey 2018

In 2018, median gross weekly earnings for full-time employees in Brent was £575.5, up 3.3% from 2017. Brent gross weekly pay is much lower compared with London and Outer London averages, around 10% lower than the Outer London average and around 16% lower than the London average (Figure 11).

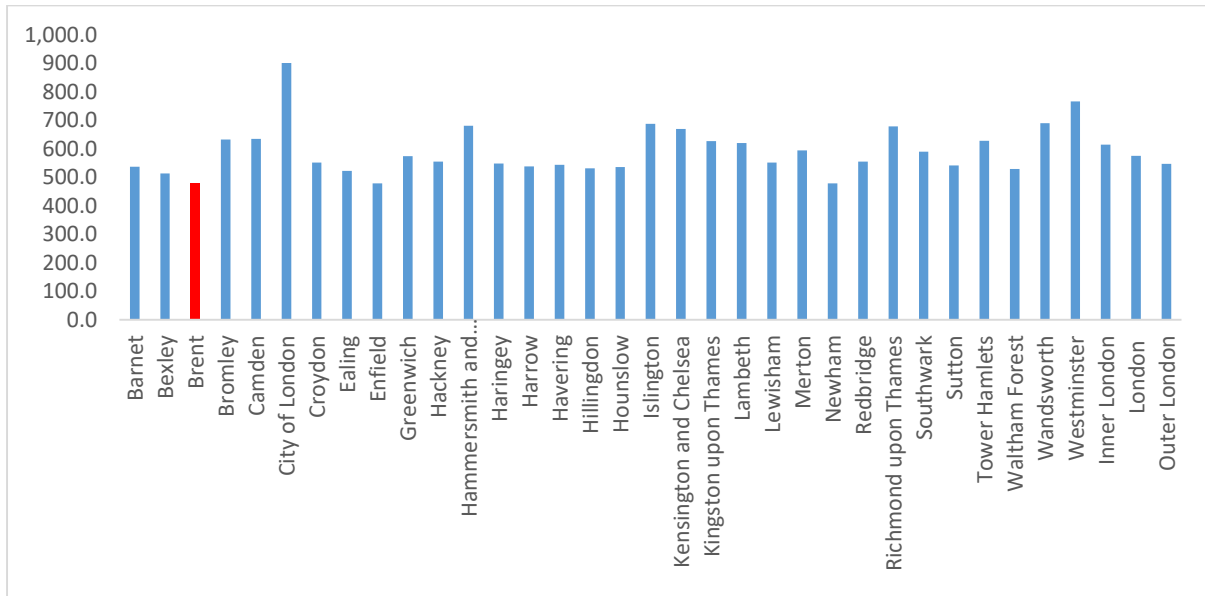
Figure 11: Median Gross Weekly earnings for Full-time employee 2018

	Brent		Outer London		London		UK	
	£	Annual % change	£	Annual % change	£	Annual % change	£	Annual % change
All	575.5	3.3	649.6	1	670.8	0.6	569	0.2
Male	601.5	4.9	696.3	1.5	719.7	1.1	609	0.3
Female	547.5	5.3	594.1	1.5	628.7	0.9	509.1	0.3

Source: ONS Annual Survey of Hours and Earnings

Comparing median gross weekly earnings for full time employees amongst London boroughs, Brent has the second lowest weekly earnings per resident in London, with Barking and Dagenham the lowest (Figure 12).

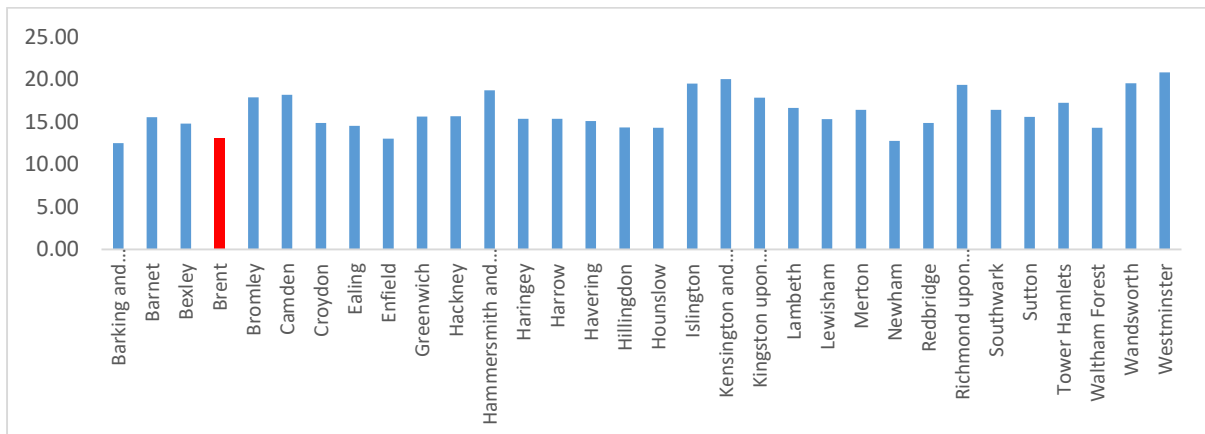
Figure 12: Average weekly pay - gross in London, 2018



Source: ONS Annual Survey of Hours and Earnings

Comparing hourly pay rates, Brent too has the second lowest hourly earnings per resident in London, with Barking and Dagenham again the lowest (Figure 13).

Figure 13: Average hourly pay - gross in London, 2018

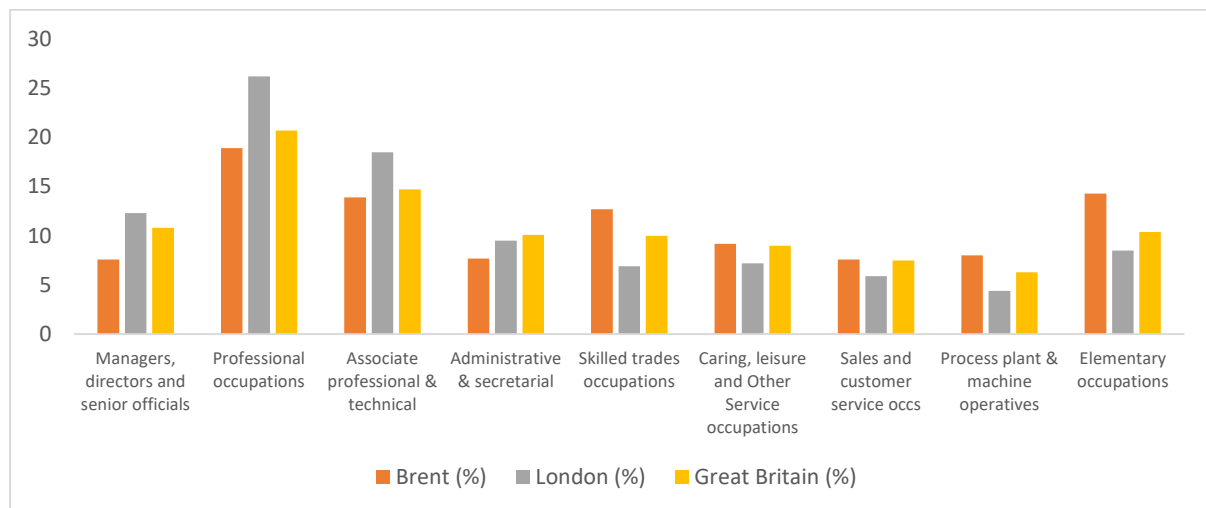


Source: GLA Datastore (2018) Gross earnings per head: by place of residence (ASHE)

Skills, Demand and Job Density

Looking at the professional profile of the residents of Brent, there seems to be an overrepresentation in elementary occupations, accounting for 14% of the working population. This compares with less than 8.5% in elementary occupations across London and under 10% in elementary occupations in Great Britain (Figure 14). At the same time, there is a lower proportion of highly professional occupations amongst Brent residents, especially compared to London. This could be partly explained due to the more industrial profile of employment in the borough, which will be further expanded on in later sections.

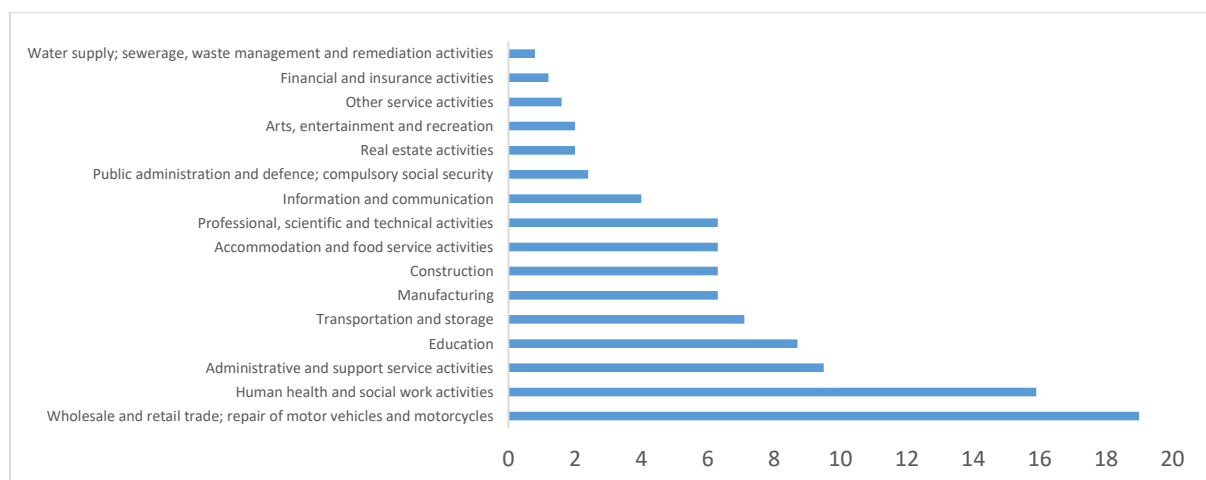
Figure 14: Employment by occupation (Jan – Dec 2018)



Source: ONS annual population survey.

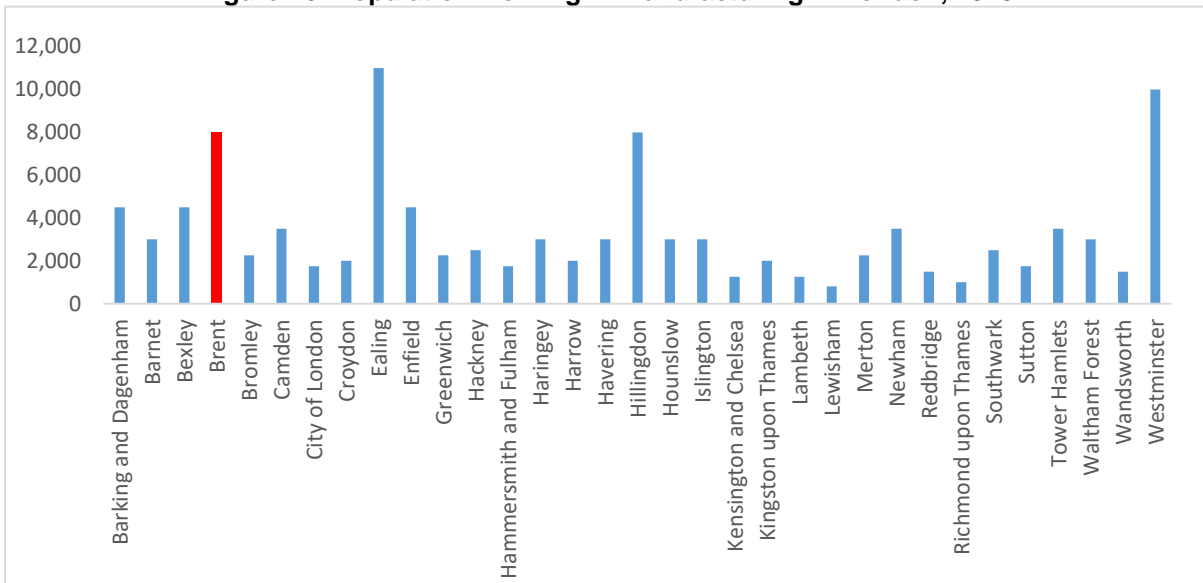
Brent's working age population, who work in London or surrounding areas, work mainly in the service economy, with 62% working in financial services, health, education & public administration and distribution, hotels & restaurants. The proportion of people working in construction and manufacturing is lower (Figure 15) although we will see that both these industries still employ relatively more people compared to other London boroughs. Note that this data is influenced and reflects the general characteristic of the London economy, including the higher proportion of professional services linked to the global status of the city rather than production industries. The particular jobs offered within the specific location of the borough of Brent will differ to the broader London offer, and will be analysed in the further section.

Figure 15: Brent Working Population, Employment by Industry, 2017



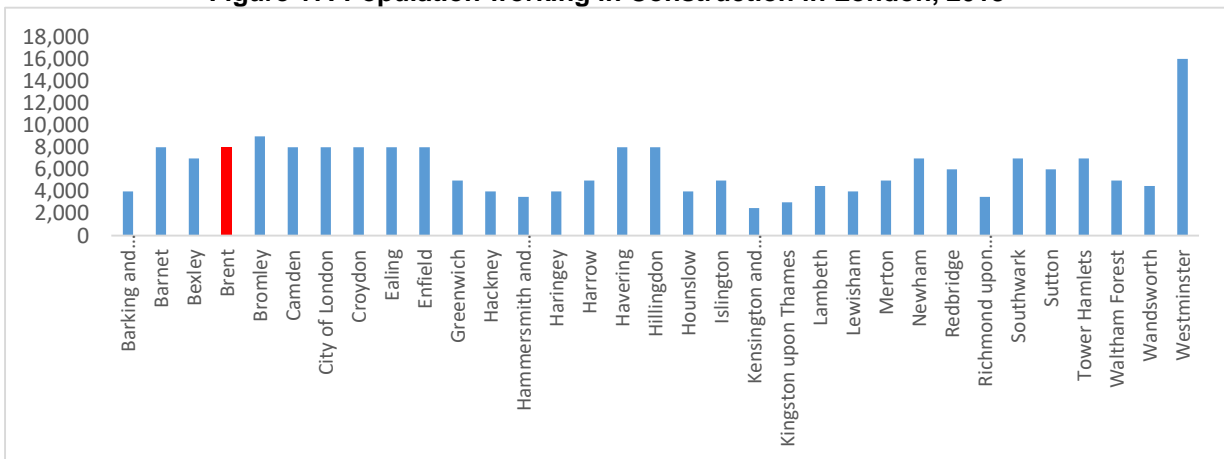
Analysing the percentage of people that work in construction, distribution and manufacturing in London as a whole, Brent has one of the largest population’s working in these sectors. Over 22% of Brent’s workforce are employed in distribution, hotel and restaurants, over 6.3% in the construction industry, and over 6.3% of employees work within the manufacturing sector (Figure 16, 17 and 18).³ Due to the importance of the industrial character of Brent, compared with other boroughs, analysing the skills required for these industries is particularly important for Brent, as will be the trends that will be expected to impact them moving forward. This includes the skills and professions of workers living in Brent and the type of industries available in the borough that will be analysed further.

Figure 16: Population working in Manufacturing in London, 2018



Source: NOMIS (2018) Employee jobs - Area Comparison

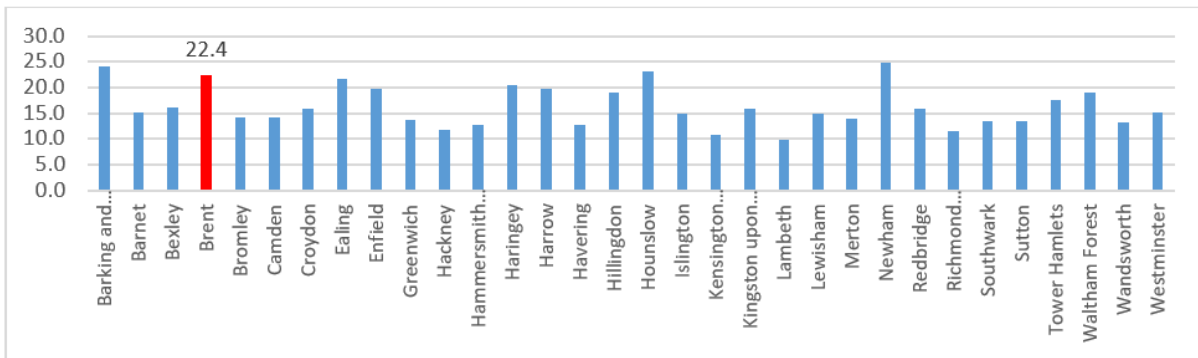
Figure 17: Population working in Construction in London, 2018



Source: NOMIS (2018) Employee jobs - Area Comparison

³ ONS (2018) Annual Population Survey. % all in employment who work in.

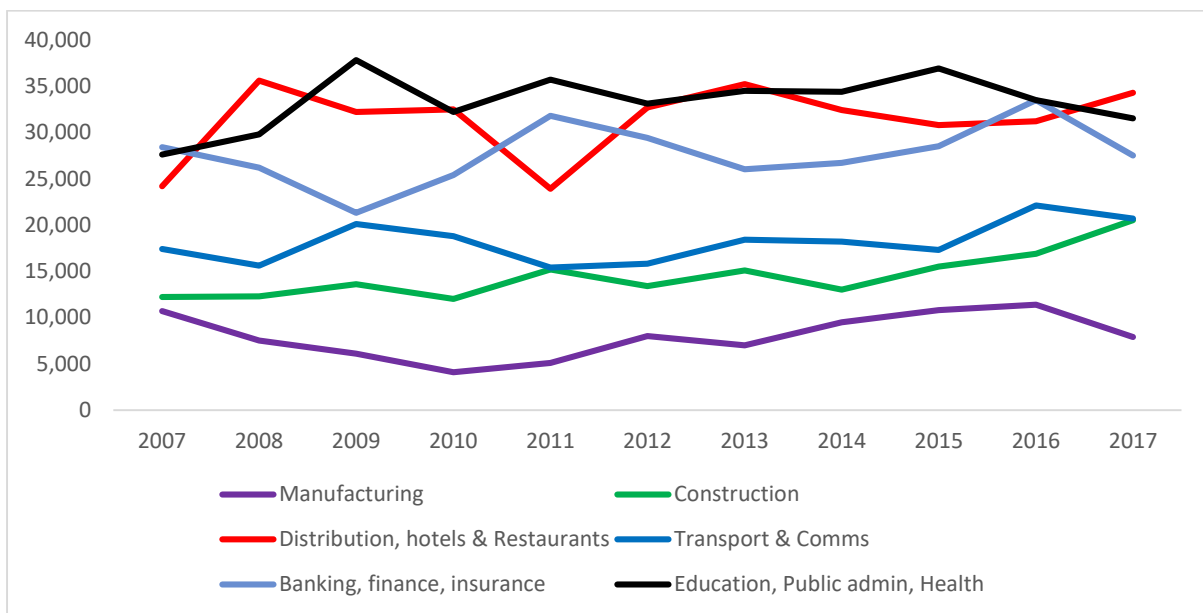
Figure 18: Population working in Distribution, hotels & restaurants in London, 2018



Source: ONS (2019) Annual Population Survey. % all in employment who work in.

Comparing historical data by sector, Brent's population working in distribution, hotels & restaurants, as well as construction, increased more than any other sector over the last 10 years, with both sectors increasing their share of the workforce by around 4% (Figure 19). Coupled with overrepresentation in these key sectors, this data demonstrates the relative importance of the industrial character of Brent to the local economy, compared with other boroughs.

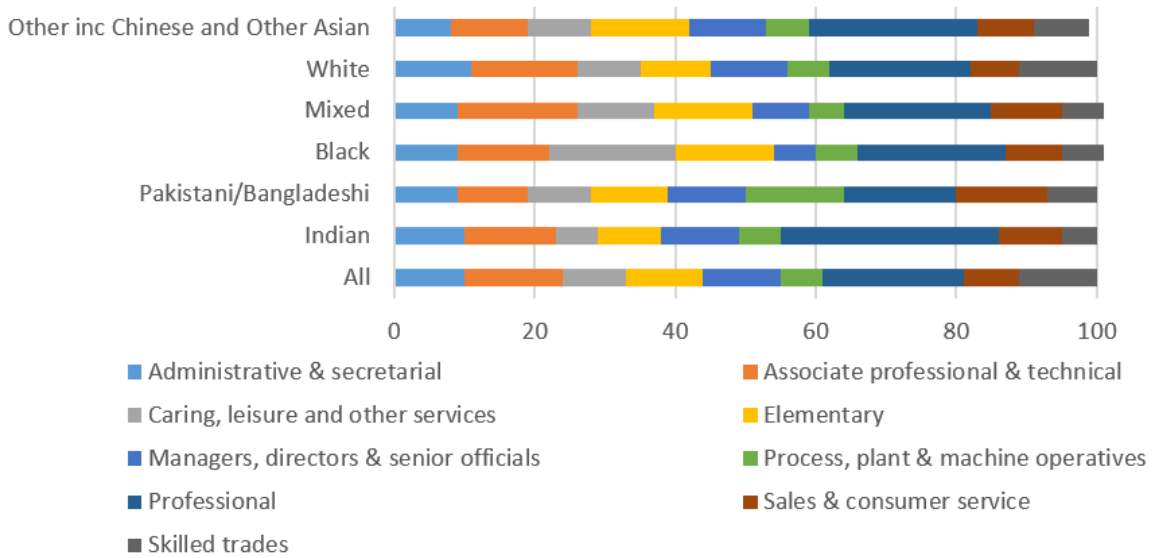
Figure 19: Brent's Employment Population by Sector, 2007-2017



Source: ONS Annual Population Survey 2018

Brent is one of the most diverse boroughs in the whole UK. Looking at the relative proportion of ethnic groups by occupation, 2018 data reveals some patterns. While white people are mostly represented in professional or skilled jobs, ethnic minority groups are mostly in a professional or elementary occupation and black groups are mainly in caring & leisure or professional occupations (Figure 20).

Figure 20; Ethnic group by occupation in Brent, 2018



Source: ONS Annual Population Survey.

After falling slightly between 2001 and 2011, the number of local jobs in Brent has picked up. In 2018, Brent reached the highest level of local employment in the last 15 years with 156,000 jobs (Figure 21)⁴. Also, comparing job density of the working age population, the job offer available in Brent is slightly above that of 15 years ago, with 0.71 jobs available for each working age person in 2018. As with the number of local jobs this figure has steadily increased since 2011 highlighting a population increase alongside local job creation. (Figure 22).

Figure 21: Local jobs in Brent

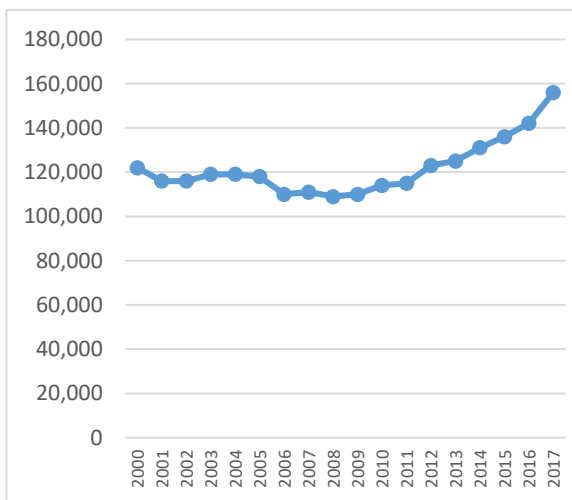
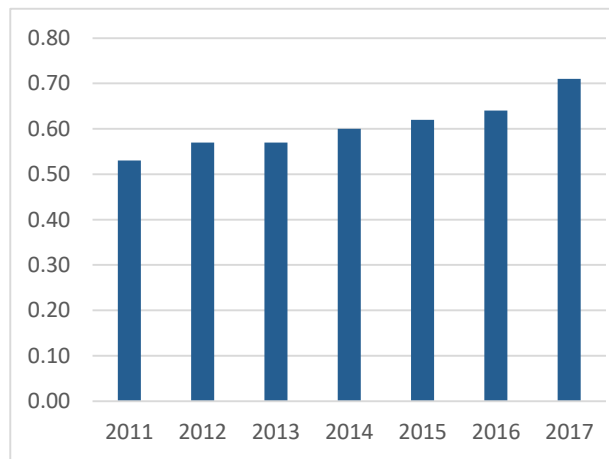


Figure 22: Job density- ratio of total jobs to population at working age



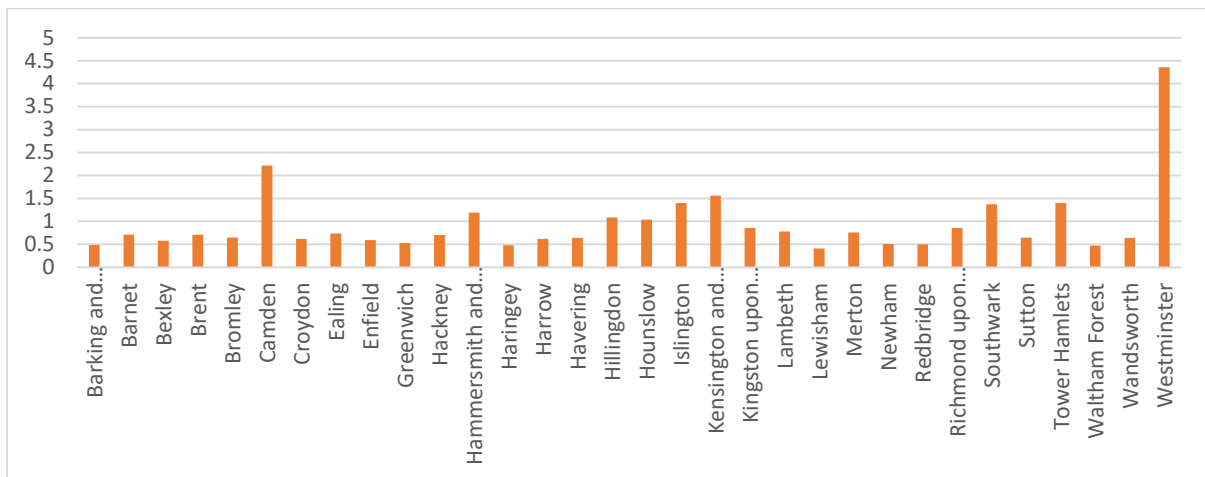
Source ONS Job Density 2018

Historically the job offer in London has been concentrated in Inner London and especially in Central Boroughs. In 2017, the job density average in Inner London was 1.48, excluding the City of London⁵, while in Outer London the job density average was 0.69. Comparing the job density in Brent with Outer London boroughs with similar working age populations, the Brent figures are highly comparable to Ealing, Enfield and Barnet (Figure 23).

⁴ Nomis (2016) Jobs Density

⁵ Job density of City of London is excluded to make data comparable.

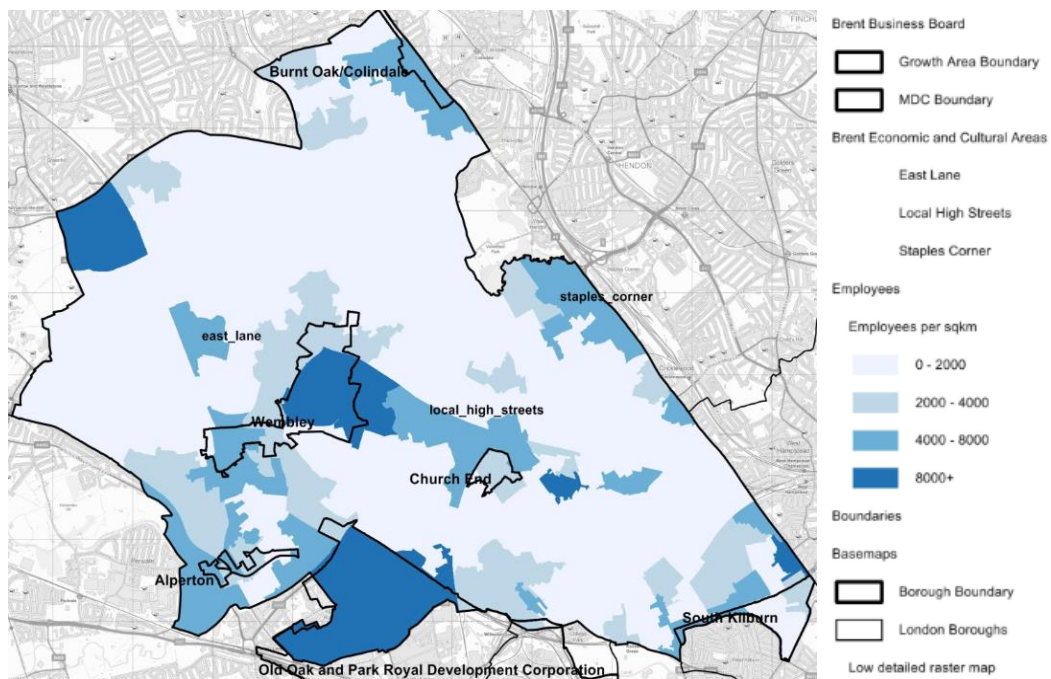
Figure 23: Job density- ratio of total jobs to population at working age



Source Nomis (2017) Jobs Density Jobs Density Area Comparison

Analysing the areas with higher concentrations of employees in Brent, Figure 24 shows the number of employees per sq. km in Brent in 2016. Park Royal, Wembley and the northern area of Northwick Park (where Northwick Park Hospital is located) are all areas with over 8000 employees. Alperton, Burnt Oak/Colindale, Staples Corner, Church End and South Kilburn are all areas with concentrations of between 4,000 and 8,000 employees. This data is analysed in the following sections, comparing sectors and type of business, to highlight which areas are important to protect for employment uses, as well as those areas which have the potential to intensify and attract more businesses, with the aim of generating more local employment opportunities and increasing the job density ratio.

Figure 24: Number of employees (per sq. km) in Brent, 2016



Source: Ordnance Survey

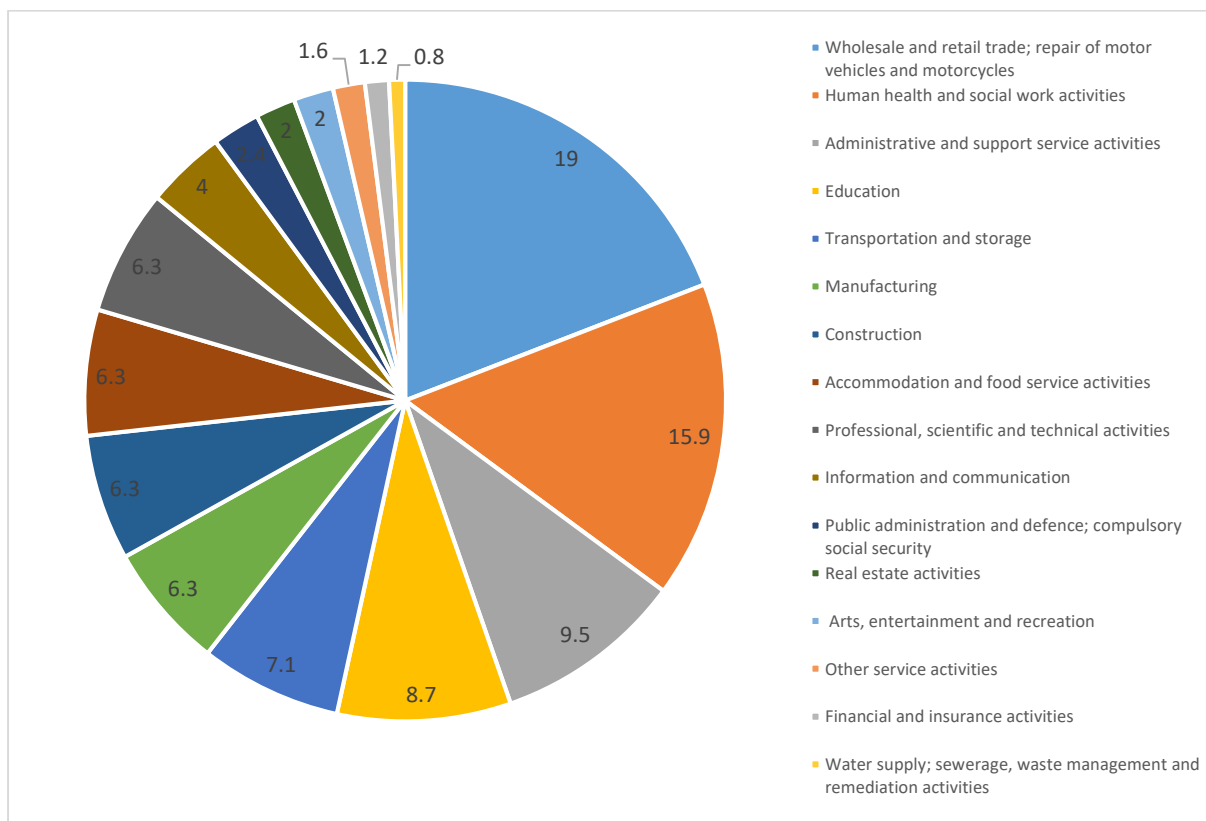
Sectors

Brent is home to over 15,000 enterprises. 92.4% are micro businesses with no more than 9 employees, 6.2% are small businesses with 10-49 employees, 1.1% medium businesses with 50-249 employees, and 0.3% are defined as large businesses with more than 250 employees.⁶ These enterprises work in a diversity of industries, or sectors. By number of enterprises, jobs and turnovers in 2016/17, those in construction, retail, and business administration could be considered the most important in Brent.

Industries such as information and communication, wholesale, and production are also important for Brent.⁷ These sectors can be seen as intrinsically linked to economic growth in the borough, particularly with the importance of Park Royal in Brent. Wholesalers play a fundamental role in the process of getting manufactured products into the hands of customers. Retailers rely upon wholesalers to purchase their stock in bulk to ensure profitably, and information and communication is used in the distribution and sale of those products.

Figures 25, 26 and 27 below show the contribution by industry of each type analysed, considering VAT and/or PAYE based enterprises.

Figure 25: Count enterprises by industry in Brent March 2018

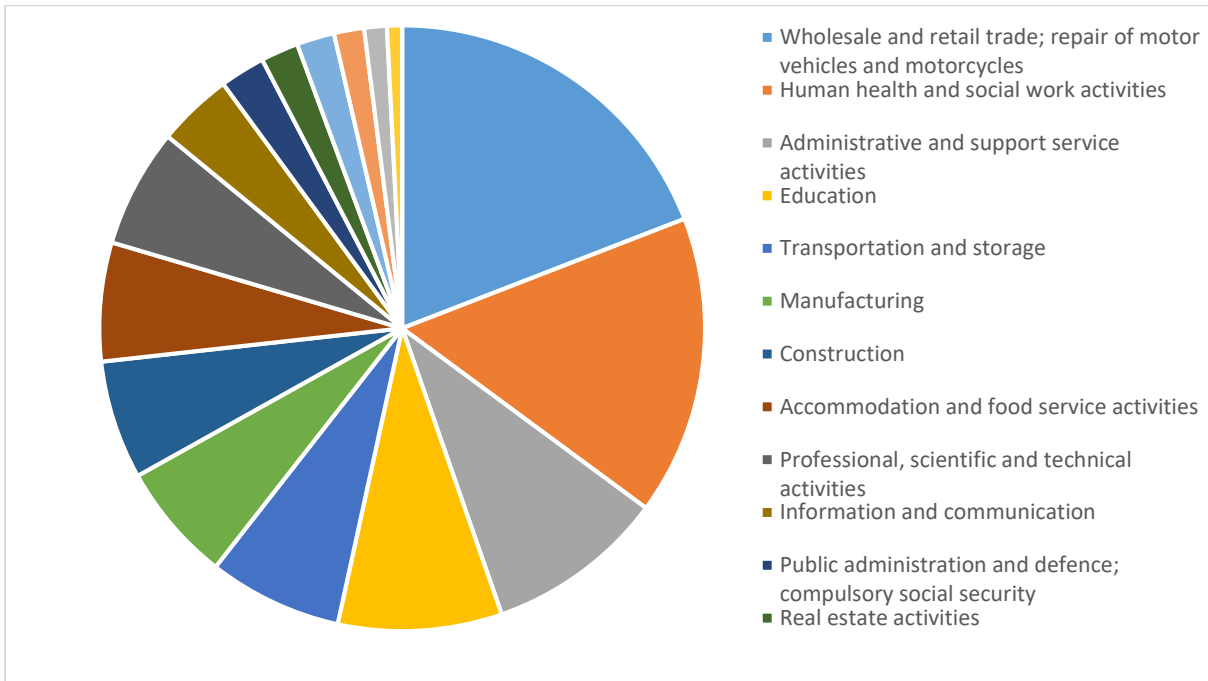


Source: ONS (2018) SME enterprises in Local Authority Districts by Broad Industry Group

⁶ NOMIS (2017) UK Business Counts - enterprises by industry and employment size band, 2016

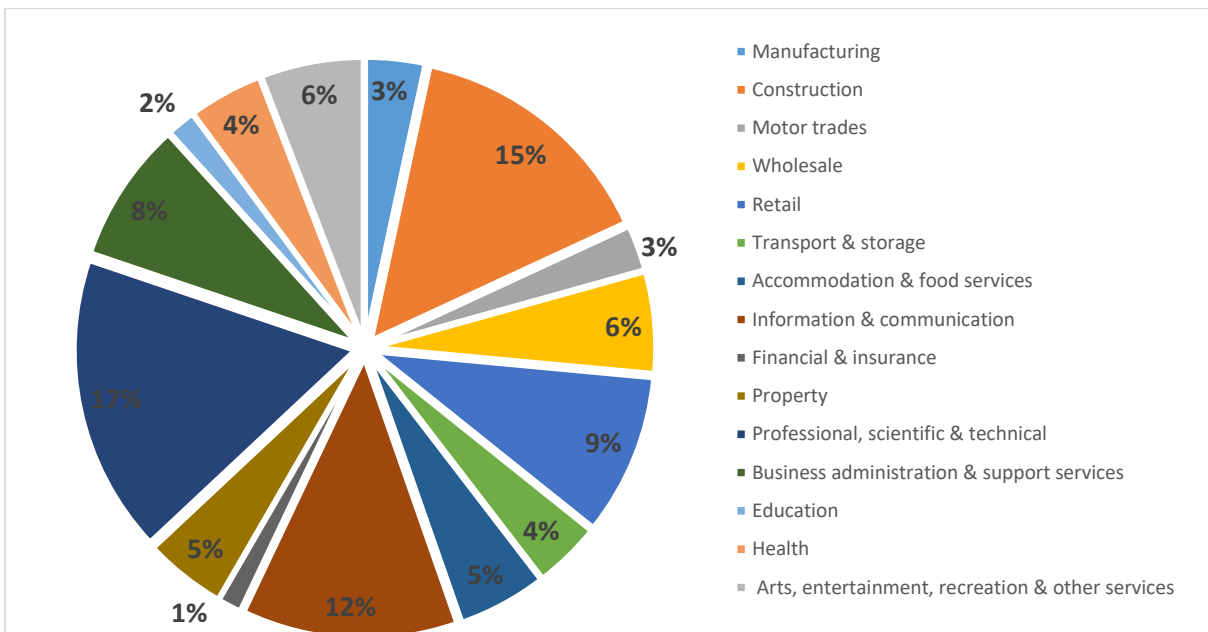
⁷ ONS (2017) SME enterprises in Local Authority Districts by Broad Industry Group. Analysis showing the count, employment, employees and turnover (£'000s) of VAT and/or PAYE based enterprises with 0-250 employees in Local Authority Districts of the United Kingdom by UK SIC 2007 Broad Industry Group.

Figure 26: Employment by industry in Brent 2018



Source: Nomis (2019) Employment by Broad Industrial Group

Figure 27: Turnover (£'000s) by industry in Brent 2018



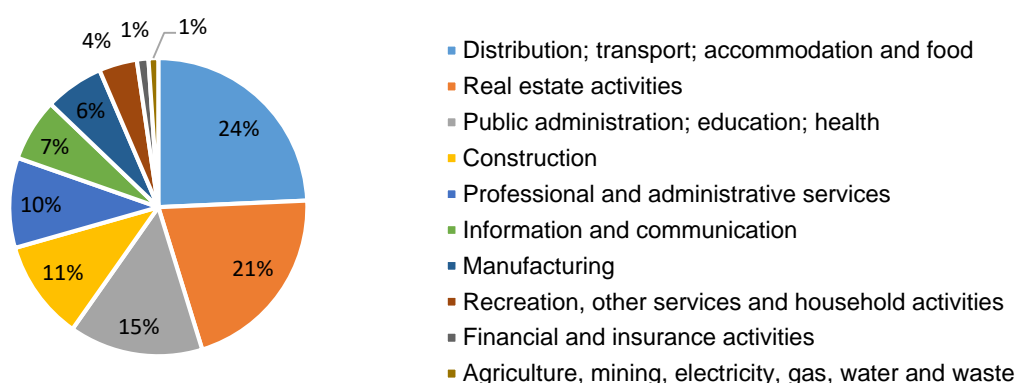
Source: ONS (2019) SME enterprises in Local Authority Districts by Broad Industry Group

In 2018, Brent's total Gross Value Added (GVA) was over £9 billion, contributing 2% to London's total GVA and 6.5% to Outer London's total GVA, and ranking as the 18th largest GVA amongst the London boroughs and the 6th largest amongst the Outer London boroughs. GVA per capita was £26,371 in 2017⁸

⁸ ONS (2017) Regional gross value added (balanced) by local authority in the UK.

Industries related to distribution, transportation, accommodation and food have the largest GVA proportion in Brent, with 24% GVA, contributing 3.5% GVA for that sector in London (Figure 28). These figures are due in large part to the proximity of Park Royal within Brent, as is the job density per sq. km (Figure 24) which shows a large concentration of employment in the South West area of the borough where Park Royal can be found. Construction and manufacturing are also important for Brent, despite having a lower contribution to GVA in the borough, due to both sectors representing an important part of GVA for that sector in London. Manufacturing in Brent contributes almost 7% GVA for that sector in London, ranking 4th amongst the boroughs, while construction in Brent contributes nearly 5% GVA for that sector in London. (Figure 29).

Figure 28: GVA by industry in Brent, 2016



Source: ONS (2017) Regional gross value added (balanced) by local authority in the UK.

Figure 29: Key sectors according contribution to London's GVA, 2017

Manufacturing	GVA Total	London %
Ealing	759	9.3
Barking and Dagenham	730	9.0
Hillingdon	683	8.4
Brent	517	6.4
London	8131	100.0

Construction	GVA Total	London %
Westminster	1872	9.32
City of London	1203	5.99
Hillingdon	1041	5.18
Brent	988	4.92
Lewisham	157	0.78
London	20095	100

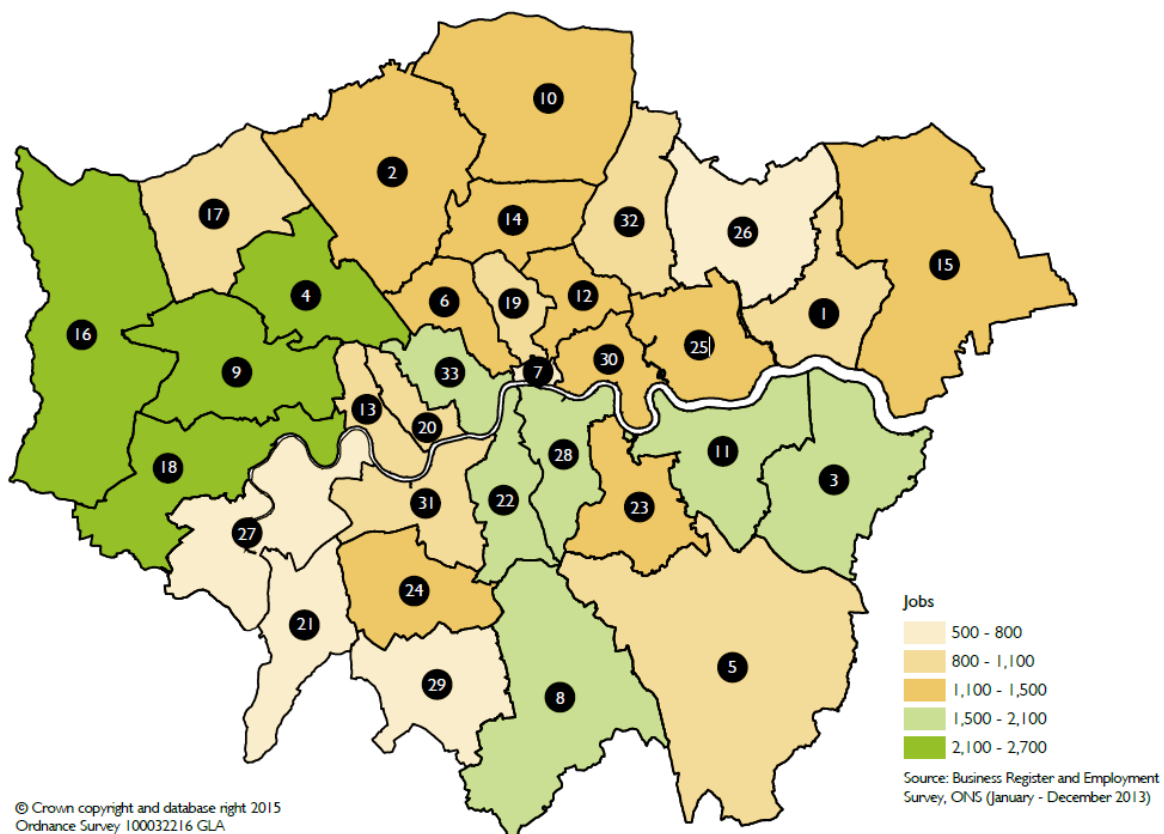
Source: ONS (2018) Regional gross value added (balanced) by local authority in the UK.

Circular Economy

The circular economy model ensures natural resources stay in the economy for as long as possible, minimising the extraction of natural resources, and re-using and recirculating goods to extract the maximum value from their original manufacture. This model reduces the environmental impact of waste generation, minimises the depletion of natural resources, reduces carbon emission, and importantly also creates new job opportunities and boosts economic activity.

An important study by The Waste and Resources Action Programme (WRAP) in 2015 in partnership with the GLA showed that in 2013 there were 46,700 jobs within the circular economy in London. WRAP identified the potential for employment in the circular economy to increase by over 40,000 jobs to 87,000 jobs by 2036⁹. The WRAP study identified that Brent and West London have the most jobs in London in the circular economy as below (Figure 30).

Figure 30: Jobs in the Circular Economy London



Updating to 2017, Brent had the 4th highest employment counts in the circular economy, compared with other Local Authorities in London at 2,415 jobs¹⁰ (Figure 31). More than 70% of circular economy jobs in Brent are currently found in two distinct sectors, waste collection and processing, and transport. With potential to include more industries in this model, including

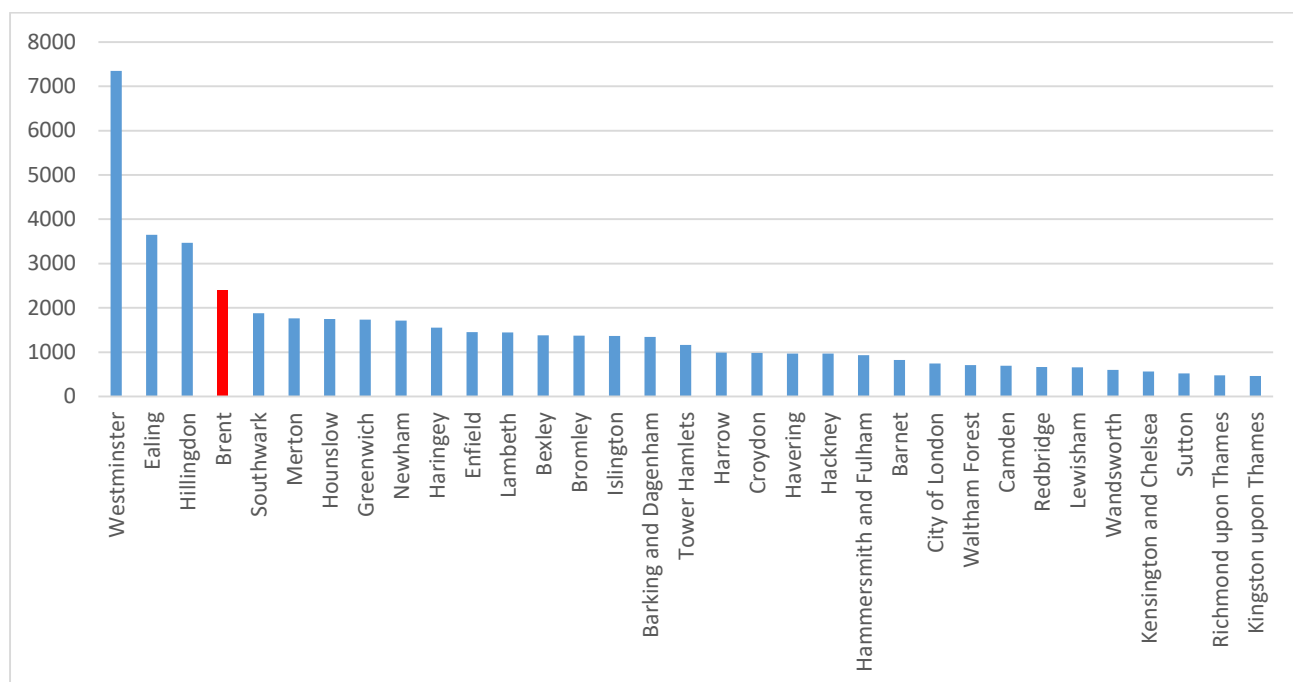
⁹ WRAP (2015). *Employment and the Circular Economy: Job creation through resource efficiency in London.*

¹⁰ NOMIS (2017) Business Register and Employment Survey

the key food manufacturing sector in Brent, and projected growth in the circular economy in London, over 2,000 new jobs could be created in the circular economy in Brent by 2036.

As opposed to the linear economy, where material goods and resources are made, used and disposed of, the circular economy keeps products, components and raw materials at the highest and longest use possible. Both from an economic and environmental point of view, a developed circular economy is vital in growing urban areas, where a growing population increases the need for waste, reuse and recycling services. Moving towards a circular economy can also stimulate innovation and new business models in areas like product design, re-use, and remanufacturing facilities, as well as new forms of finance.

Figure 31: Number of Circular Economy Jobs 2017



Source: NOMIS Business Register and Employment Survey

Activities related with waste management are considered part of the circular economy. Recycle, reuse and compost are key elements of this and in 2018 Brent Council had 32% of waste in this category.¹¹

Employment Centres and Workplace Zones

Brent has a diverse economic geography, with the following key employment hubs identified on the basis of the number of enterprises and jobs concentrated in particular areas¹².

- Park Royal: largest industrial site in London for food manufacturing, strategic media and logistics. With potential to meet demand for logistics and waste management
- Wembley: home to Wembley Stadium and Wembley Arena. Strategic retail, office and public sector hub. Leisure uses, with tourism services, culture and sports.
- Staples Corner: industrial location, suitable for general and light industry, and potential for intensification.
- Northern area of Northwick Park: location of Northwick Park Hospital and a concentration of health and education activities.

¹¹ DEFRA (2017) Local Authority Collected Waste Management Statistics.

¹², ¹⁰ AECOM (2015) Brent Employment Land Demand Study.

The south east of Brent is characterized by concentrations of higher value business and employment activities, while the north is much more residential, with small industrial sites and town centres.¹³

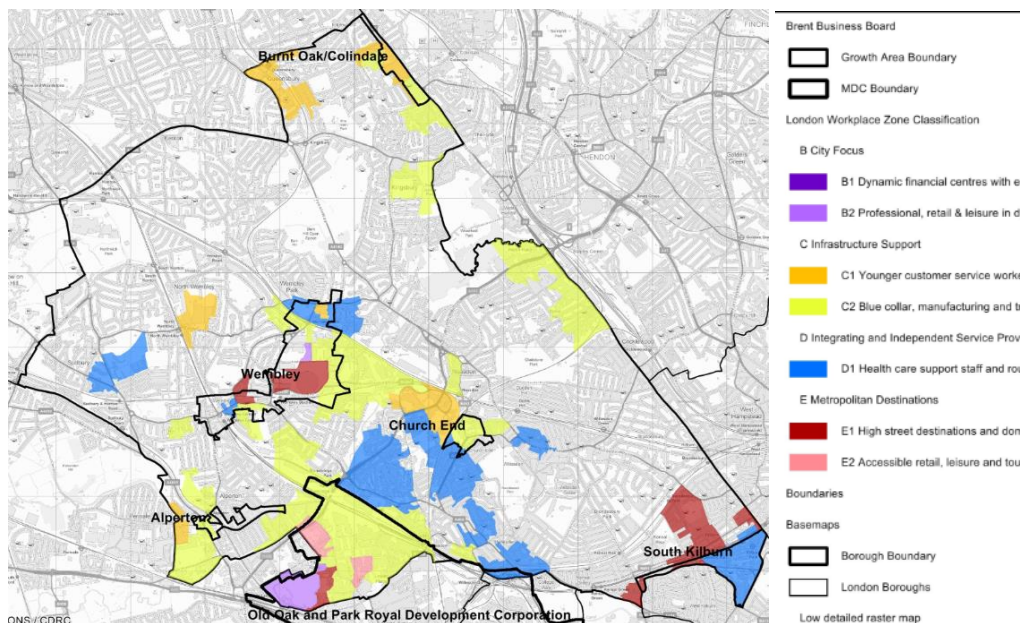
Employment hubs and Strategic Industrial Locations (SIL) with potential for mixed use intensification include:¹⁴

- Eastern Gateway at Willesden Junction
- Southern Gateway around North Acton station
- Western Gateway around the Diageo First Central site
- Northern Gateway centred around Northfields industrial estate.

Classifying areas by business and employment characteristics, and workplace zone classification in Figure 32 below, highlights the following industries and areas:

- B2. Professional retail & leisure activities are located in Wembley and Park Royal.
- C1. Wholesale and retail services are mainly in Burnt Oak/Colindale, close to Church End and Alperton areas,
- C2. Blue collar, manufacture and transport workplace zones are in Park Royal, Alperton ward, around Ealing Road and A5 corridor.
- E1. High street and domestic employers are mainly in the centre of Wembley and in the North boundary of South Kilburn.

Figure 32: Selected Workplace Zone Classification in Brent, 2017



Source: Ordnance Survey with data from 2017 London Workplace Zone Classification.

¹³ Regeneris Consulting, We Made That and PRD (2017) Brent Workspace Study.

Business Performance

Business size provides a useful indication of the make-up of firms operating in LB Brent. Growth in the business base has been driven by smaller enterprises. Data from 2018 shows that small businesses contribute significantly to employment within the borough, with 13,885 businesses defined as ‘micro’ size (up to nine employees), comprising 92.4% of the stock of 15,030 companies registered within the Borough.¹⁵ The percentage of small firms in Brent is similar to the average for Outer London but higher than London and Great Britain (Figure 33).

Figure 33: Business Performance Indicators

	Brent	Outer London	London	Great Britain
Number of total enterprises (2018)	15,030	240,050	506,180	2,596,320
% of SME enterprises (2018)	92	93	91	89
High Growth enterprises (2016)	55	780	2,640	12,875
Number of jobs (2017)	126,000	-	5,134,000	29,375,000
Jobs Density (2017)	0.7	0.7	1.0	0.9
Number of active businesses (2017)	17,505	284,445	607,870	2,864,990
Five-year business survival rates (started in 2014)	39	42	39	43
Three year business survival rates (started in 2014)	59	61	59	61
Two-year business survival rates (started in 2015)	72	73	68	71

Source: Business Register Employment Survey, Office for National Statistics, IDBR, ONS, and ONS Business Demographics.

Local business performance indicators are somewhat limited and calls by the Inclusive Growth Commission (IGC) for a new inclusive growth metric¹⁶, which could be formed by measuring local productivity, local incomes, the distribution of earnings, pay changes for the lowest paid and levels of regional economic inactivity, would help to drill down at a local level to get a better picture of the current situation. If this new metric of economic performance was available, then it would tell us more about how the opportunities and benefits of growth are distributed across different spatial areas and social or income groups. It would further help to track structural economic change, the sustainability of growth, and the human impact of shifts in the labour market.

What data we do have, however, shows that high and growing levels of self-employment in Brent, above the London and national averages, could be evidence of an entrepreneurial culture in the Borough. However, comparing local job availability and unemployment rates in Brent, it is not clear whether self-employment stems from an entrepreneurial culture, or is rather the necessary consequence of a lack of job opportunities within Brent. To understand the entrepreneurial culture in Brent, we must therefore also analyse changes in the number of businesses.

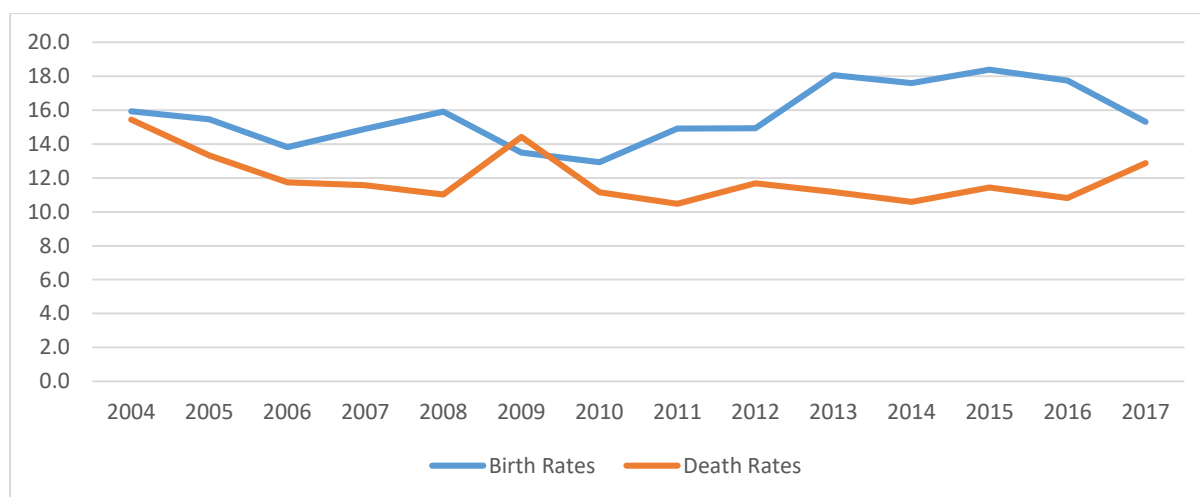
Apart from an apparent drop in 2009 and 2010, as result of the negative effects post the financial crash of 2008, business births have exceeded business deaths in Brent over the past

¹⁵ ONS (2016); UK Business: Activity, Size and Location. Table UKBAD01

¹⁶ Wallace. T, (2017). Telegraph Online; Available at: <https://www.telegraph.co.uk/business/2017/03/07/gdp-not-enough-economists-businesses-demand-new-measure-inclusive/>

decade, accounting for 3,020 new business in 2016. Brent business death rates have increased however, with 12.2% of businesses failing in 2016, compared with 11.7% in 2006. Figure 34 below shows the business birth and death rates, as a proportion of active businesses in Brent.¹⁷ Some factors affecting business patterns in Brent, which are similar to both the UK and London, are the highly competitive business climate in the city, economic uncertainty following the UK's EU referendum result, higher inflation rates, and depreciation of sterling leading to higher raw material and import prices that discourage the birth of new business and increase business death rates.¹⁸

Figure 34: Business Birth and Death Rates, Brent



Source: ONS (2018) Business demographics. Enterprise Births, Enterprise Deaths, Active Enterprises and Survival Rates.

Brent, Outer London, London and the UK have higher net start-up rates, with approximately 90% of companies surviving 1 year, except London where the figure is 86%, but only around 50% of companies surviving 5 years or more. Analysing these survival rates the evidence is that overall, in all the regions, less companies now survive through the 1st year of operations than in previous years, but that the number of businesses that have survived for 5 years is increasing, although the latest 5-year survival statistics were published in 2012. It is important to highlight that comparing survival rates among regions, Brent has a similar 1-year business survival rate to Outer London and London, and a higher survival rate than the UK. However, the 5-year business survival rate in Brent is lower than those 3 other regions (Figure 36).

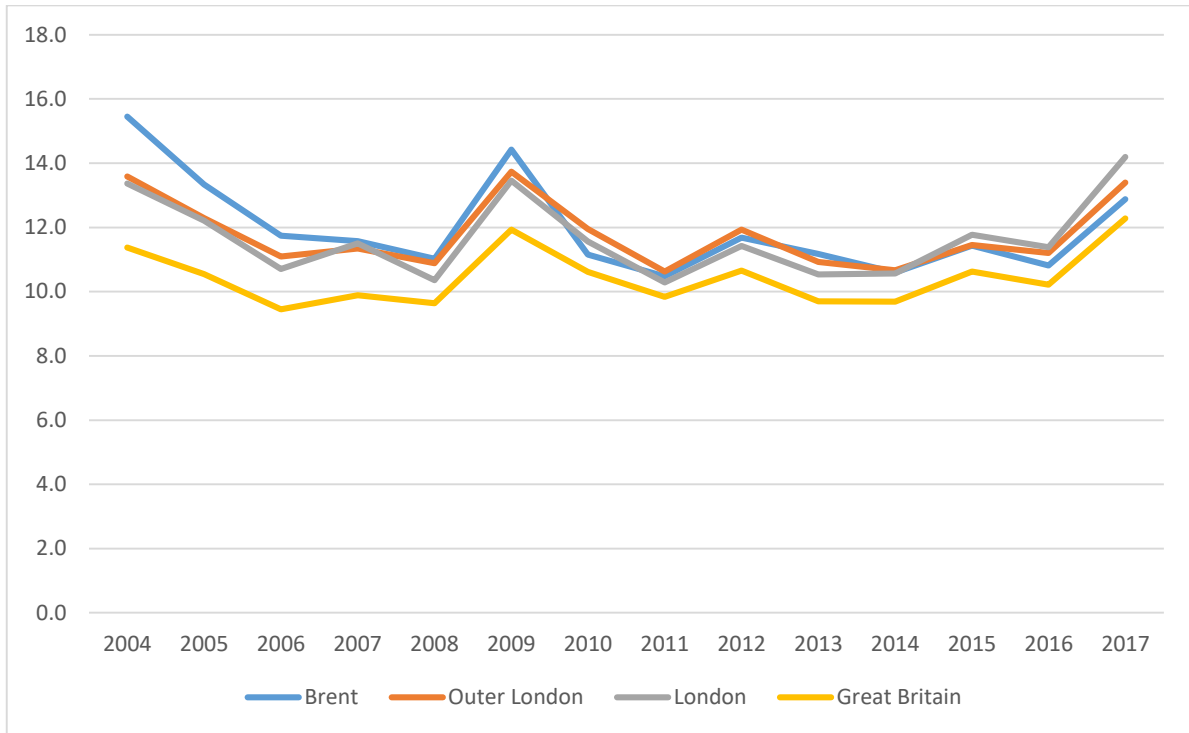
One of the reasons that explains why Brent business survival rates differs from other regions is the higher proportion of businesses related with construction, wholesale, retail, and food and beverage, and that those sectors had a lower survival rate over the period.¹⁹

¹⁷ ONS (2017) Business demographics. Enterprise Births, Enterprise Deaths, Active Enterprises and Survival Rates.

¹⁸ ONS (2016) Statistical Bulletin. Business demography, UK: 2016 & GLA (2016) Economic Evidence Base. Chapter 5.

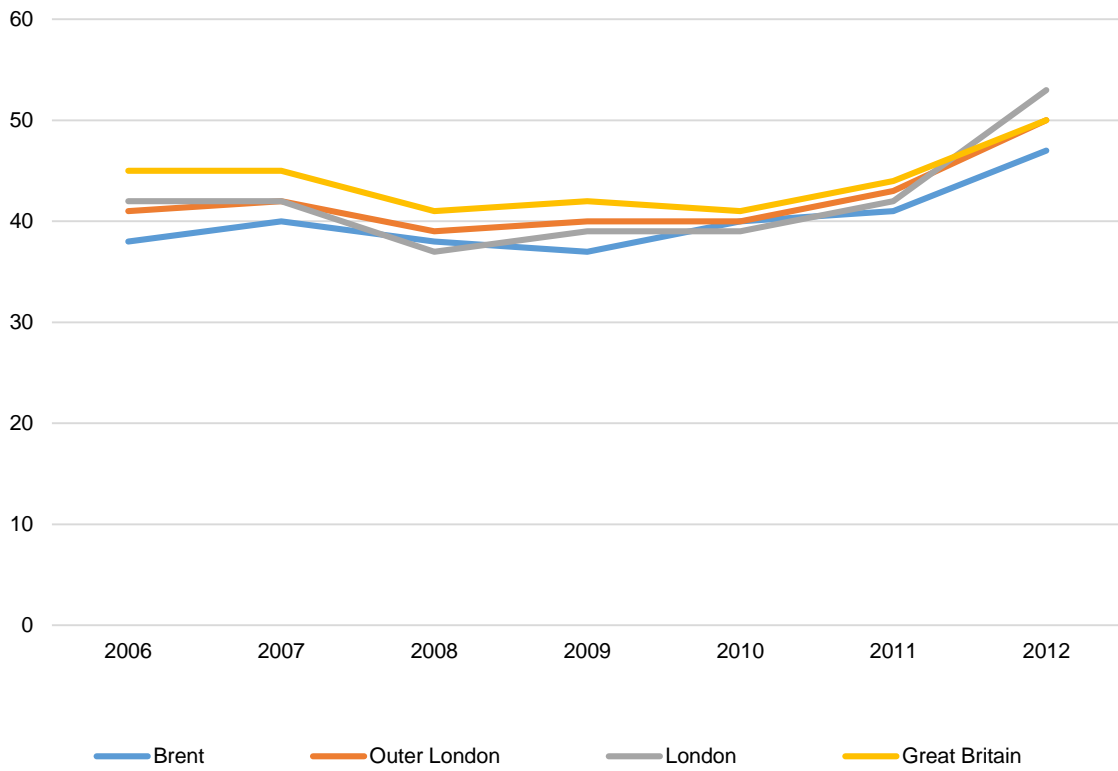
¹⁹ Analysis considering ONS (2017) Business demography 2016 table 2.2 Count of deaths of enterprises for 2010 to 2016 by standard industrial classification (SIC2007) group by year & NOMIS (2012) Business Counts-enterprises by industry and employment size band.

Figure 35: Business Survival Rates 1 year



Source: ONS (2018) Business demographics. Enterprise Births, Enterprise Deaths, Active Enterprises and Survival Rates.

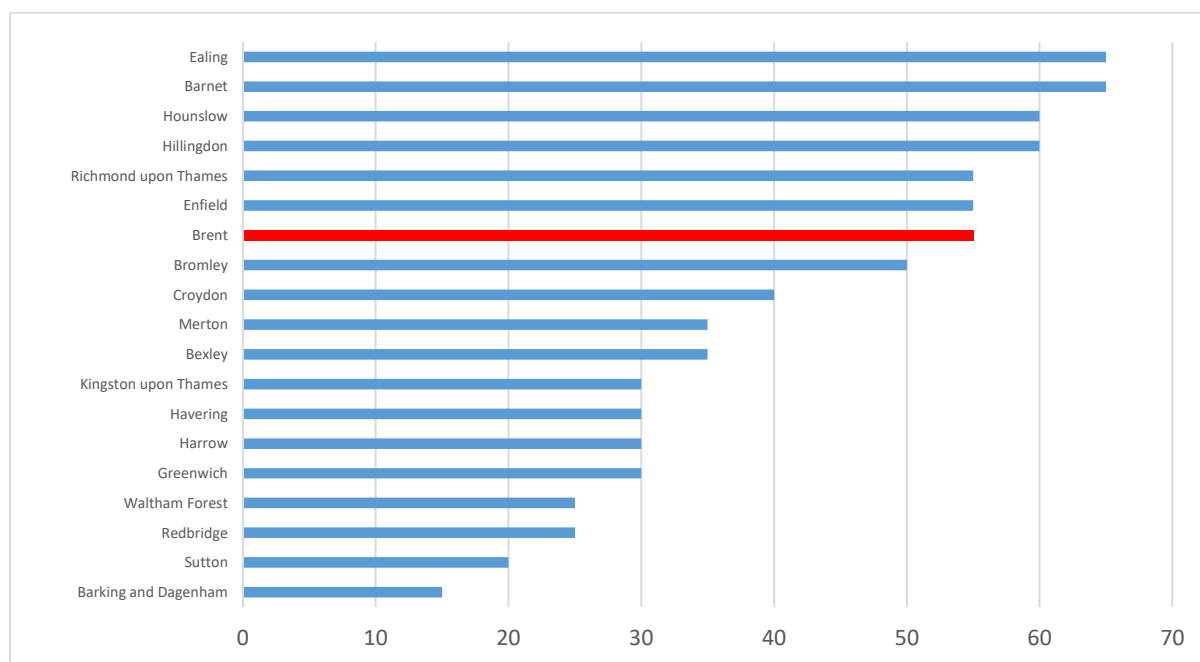
Figure 36: Business Survival Rates 5 years



Source: ONS (2017) Business demographics. Enterprise Births, Enterprise Deaths, Active Enterprises and Survival Rates.

Despite business survival rate differences in Brent compared with the other regions, in 2017 63% of Brent enterprises that grew had turnovers that increased up to 5%, and 23% had turnovers that increased by more than 20%²⁰. High growth is defined as business with 10 or more employees and average annualised growth of 20% or more. These high growth enterprises are particularly important to the local economy and Brent had one of the largest amount of high growth enterprises in Outer London as shown in Figure 37.

Figure 37: High Growth Enterprises in Outer London, 2017



ONS (2019) Business Demography: High Growth Enterprises.

Town Centres

A LB Brent commissioned study by consultancy firm Regeneris benchmarks baseline data and tracks improvements against Brent’s 19 town centres to understand their current economic, social and environmental performance. This has included analysing the 2 Major, 11 District and 4 Local Centres which vary in size, purpose and performance.

The study found Brent’s town centres serve a wide range of needs. They are highly social, diverse and accessible places which support jobs, provide transport connections and are a place for communities to meet. However, town centres across London are undergoing change, with many facing challenges which threaten the value they offer those living and working in them. These include:

- Increased rates and complex regulations
- Housing development pressures on commercial space
- Affordability pressures linked to rising property values
- Increased online retail as a share of total retail spending
- National-level policy changes and cuts to public services.²¹

²⁰ ONS (2016) UK Business: Activity, size and location-2015. Table Analysis 4 2016.

²¹ Brent Town Centres Health Check Assessment 2018, Regeneris, April 2018.

Brent town centres are an important source of employment in the borough with 3,376 units providing around 25,400 jobs which is over 20% of all employment. Of these jobs the vast majority (50%) are in Wembley Central (including LDO). Other prominent town centres for employment include Wembley Park 1,800 jobs, Kilburn 1,300 jobs and Harlesden 1,300 jobs.²² Town centres are also an important generator of business rates for the council. In 2017 town centres across Brent contributed approximately £88m in business rates. Wembley Central paid the largest amount of business rates but also has the largest commercial floor space in the borough.²³

Brent town centres have a vacancy rate (7%) broadly in line with that of the London average (6%). A 6-7% vacancy is considered normal and healthy, allowing for the efficient functioning of the market. There are however a number of town centres in the borough with relatively high vacancy rates including Church End (16%), Neasden (12%) and Willesden Green (11%) which is much more concerning and indicative of decline.²⁴

The performance of Brent town centres in relation to each other and other London town centres can be seen in Figure 38. The performance seems to reflect the diversity of Brent town centres with no clear pattern emerging, although the Major centres do seem to be performing worse than their equivalent counterparts elsewhere in London, in particular Kilburn which has the lowest employment statistics of all 34 Major Centres in London.

Figure 38: Major Town Centre Performance

Major Town Centre Ranking (Out of 34 Major Centres)

Town Centre	Vacancy Rate <i>Lowest = 1st</i>	Employment <i>Highest = 1st</i>	Retail Floorspace <i>Highest = 1st</i>	% Convenience <i>Highest % = 1st</i>	% Betting Shops <i>Lowest % = 1st</i>
Wembley	26 th	17 th	31 st	28 th	30 th
Kilburn	30 th	34 th	21 st	15 th	29 th

District Town Centre Ranking (Out of 151 District Centres)

Town Centre	Vacancy Rate <i>Lowest = 1st</i>	Employment <i>Highest = 1st</i>	Retail Floorspace <i>Highest = 1st</i>	% Convenience <i>Highest % = 1st</i>	% Betting Shops <i>Lowest % = 1st</i>
Burnt Oak	26 th	97 th	20 th	87 th	90 th
Colindale/ The Hyde	84 th	127 th	147 th	93 rd	144 th
Cricklewood	63 rd	88 th	40 th	111 th	118 th
Ealing Road	32 nd	127 th	123 rd	129 th	120 th
Harlesden	90 th	70 th	18 th	53 rd	110 th
Kenton	7 th	114 th	62 nd	13 th	2 nd
Kingsbury	6 th	127 th	80 th	16 th	50 th
Neasden	130 th	127 th	121 st	20 th	136 th
Preston Road	15 th	N/A	130 th	72 nd	83 rd
Wembley Park	5 th	3 rd	60 th	7 th	65 th
Willesden Green	125 th	97 th	75 th	49 th	92 nd

Source: GLA London Town Centre Healthcheck, 2017

Note: Cells highlighted orange are in the top quarter of their classification, cells highlighted blue are in the bottom quarter



²² Ibid

²³ Ibid

²⁴ Ibid

Key Trends

Brent's economic perspectives are influenced by major economic events and political decisions that impact London and the UK. Expected population growth, including increased life expectancy rates, increased business attractiveness and job opportunities, reducing inequalities, and ensuring social well-being and economic welfare in the borough, are all challenges moving forward into the future. Therefore, this section analyses those main changes and trends that will shape Brent's economy looking forward to 2040.

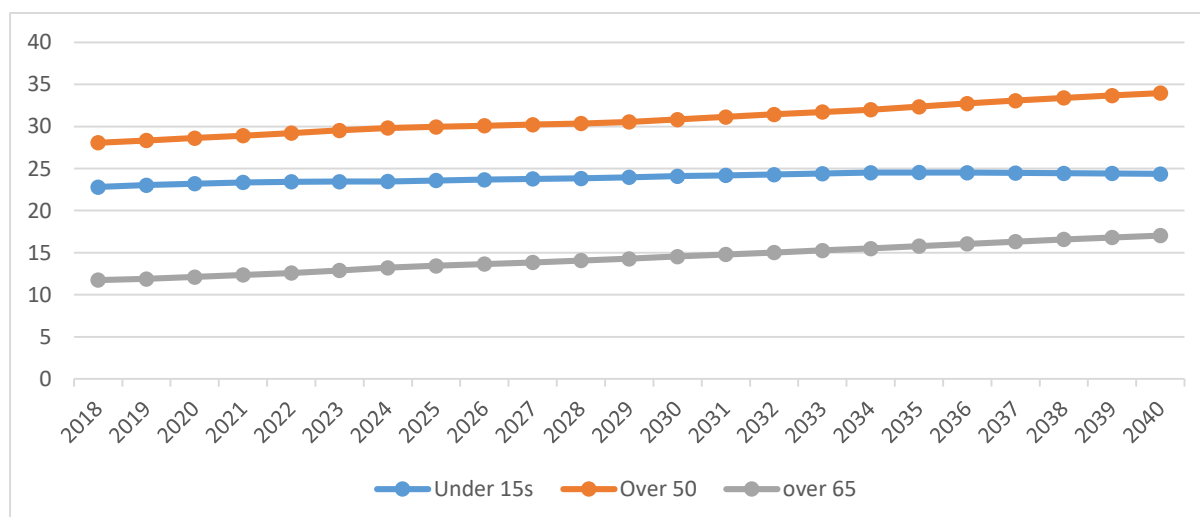
Trend 1: Increasing Older Population

An ageing population is now a dominant demographic trend in advanced economies as life expectancy has and continues to increase. People are living longer and this has a number of important economic impacts.

In the UK, current average life expectancy at 65 is 23.8 years for females and 21.6 years for males. Between 2018 and 2064 average life expectancy is projected to increase 5 additional years for both genders²⁵.

Brent's population is projected to increase 17% between 2019 and 2040. A major contribution to this growth is the increase in longevity. In 2018, Brent's population aged 50 years or over was over 28% of the total population, the highest percentage in the last 20 years. By 2040 Brent's population aged over 50 years or over is expected to grow to over 34% of the total population. At the same time the population aged under 15 years is expected to decline, falling from 20% of the total population in 2016 to 17% of the total population in 2040 (Figure 39).²⁶

Figure 39: Brent's Population Projection % Total



Source: ONS (2018) 2016-Based subnational population projections for Local Authorities in England: table 2.

The challenges related to an ageing population most commonly mentioned are the provision of pensions, healthcare and specialist housing.²⁷ The older population in the city is, however, not a homogeneous group, and whilst some require support, care services, and help to cope with financial pressures, others play a significant role starting new businesses after retirement age or represent potential consumers.²⁸ In order to reduce gaps among the older population it is important to increase economic access and opportunities for this group in Brent, and

²⁵ Fuller working lives: evidence base 2017.

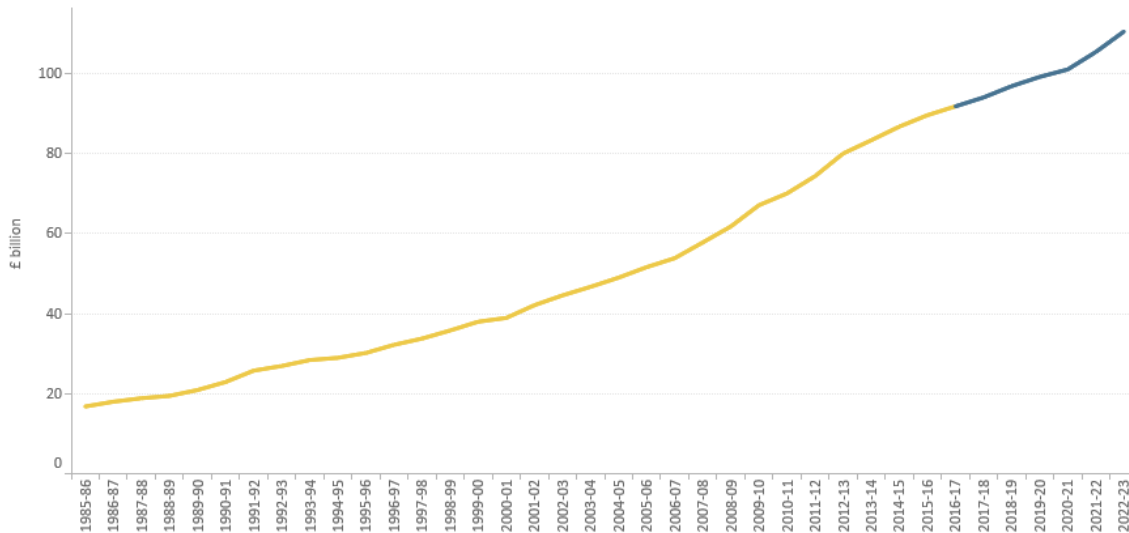
²⁶ ONS (2016) 2014-Based subnational population projections for Local Authorities in England: table 2.

²⁷ Mayor's Design Advisory Group (2015) Ageing London

²⁸ Nesta (2009) The grey economy: How third age entrepreneurs are contributing to growth.

transfer their valuable skills, expertise and knowledge, to younger generations through work, training and academia. Active older citizens therefore have a key role to play in Brent's future prosperity.

Figure 40: State Pensions Costs 1985 - 2023

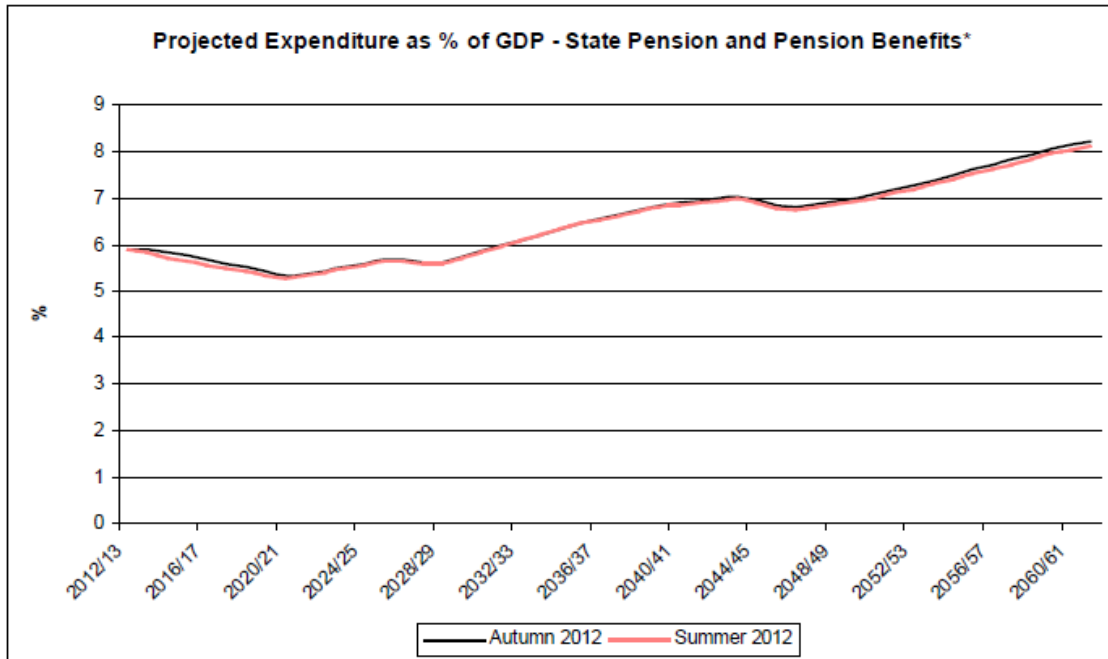


Source: Office of Budgetary Responsibility

Office of Budgetary Responsibility (OBR) forecasts are that state pension spending is set to rise by 14% between 2016-17 and 2021-22. As that is slightly less than OBR forecast for nominal GDP growth, this represents a fall of around 0.1% GDP. This fall is mostly driven by lower caseloads, as pressure from an ageing population is more than offset by ongoing rises in the state pension age, which is set to reach 66 for men and women by 2020. This is partly offset by awards rising faster than earnings at the start of the forecast due to the triple lock on uprating.

There is a significant increase in forecast spending between 2020-21 and 2021-22. Paragraphs 5.18 and 5.19 of the OBR November 2016 Economic and Fiscal Outlook explain how it is expected that the state pension caseload will rise more quickly from 2020-21 onwards, as the effects of ageing will not be offset by further rises in the state pension age until 2028.

Figure 41: State Pension & Pension Benefit Costs 2012 - 2061



* Excluding Housing Benefit, Disability Living Allowance, Personal Independence Payment and Attendance Allowance.

Source: Office of Budgetary Responsibility

Current employment rates for those aged 65 years or over are the highest in Brent in the last 10 years, and are expected to continue increasing into the future, due not least to the proposed state pension age increasing from 65-years to 68-years old.²⁹ Demand for adult training is therefore expected to increase, to improve qualifications and skills to ensure an ageing population maintains access to labour markets, either as employees, self-employed, or as entrepreneurs, and increasing the strength and benefits of the silver economy.

The silver economy is defined as that part of the economy that involves citizens aged 50 years or over. The silver economy brings important economic benefits to the UK, London and Brent, including over £47 billion income generated from Londoners aged 50 years or over, including around £1.78 billion from those in Brent. A further £6.3 billion contribution for earning and volunteering comes from those aged 65 years or over in London, including around £225 million from those in Brent's.³⁰ In the UK, 40% of consumer demand is from the older population, which spends £200 billion per year.³¹ The silver economy, therefore, underpins sectors such as tourism, hospitality, health & wellbeing, restaurants, leisure goods and education.

Trend 2: Potential Economic and Demographic Impacts of EU Referendum and Brexit.

Following the UK referendum vote to leave the EU, and subsequent triggering of Article 50, the timetable for the UK to negotiate an exit deal has had a number of extensions. Understanding and accounting for possible effects of Brexit on UK, London and Brent economies is essential when drawing up future policy responses to 2040. Though many things remain uncertain about Brexit, the final deal and its potential consequences, it is indisputable that leaving the EU will have an impact on the economy in the short and long term. The

²⁹ Department for Work and Pensions (2017): Proposed new timetable for State Pension age increases.

³⁰ Brent's estimations based on Wise age (2017) Older people, employment & Economic Development in London.

³¹ IPPR North (2014) Silver Cities: Realising the potential of our growing older population.

referendum consequences could be especially challenging for Brent in particular, which has the third largest EU population in London, representing 20% of Brent’s working age population.

Notwithstanding Brexit negotiations are ongoing, before the EU referendum, national government’s central estimate was that:

*“Britain would be permanently poorer by the equivalent of £4,300 per household by 2030 and every year thereafter”.*³²

Compared with pre-referendum forecasts, HM Treasury’s summarised its own view of the short term impact of Brexit in the following words:

*“The analysis shows that the economy would fall into recession with four quarters of negative growth. After two years, GDP would be around 3.6% lower.... the fall in the value of the pound would be around 12%, and unemployment would increase by around 500,000, with all regions experiencing a rise in the number of people out of work. The exchange-rate-driven increase in the price of imports would lead to a material increase in prices, with the CPI inflation rate higher by 2.3 percentage points after a year”.*³³

This scenario could be better or worse depending on the negotiation achieved and market reaction. Figure 42 below shows the HM Treasury intermediate predictions by 2030, the “shock” scenario predicted according the minimum impact considered due to Brexit, and the “severe” scenario if Brexit negotiation and market reaction is higher.

Figure 42: Intermediate impact of a vote to leave the EU on the UK

	Shock scenario	Severe shock scenario
GDP	-3.6%	-6.0%
Inflation	+2.3%	+2.7%
Unemployment rate	+1.6%	+2.4%
Unemployment (level)	520,000	+820,000
Average real wages	-2.8%	-4.0%
Houses prices	-10.0%	-18.0%
Sterling exchange rate index	-12.0%	-15.0%
Public sector net borrowing (£ billion)	+£24 billion	+£39 billion

Source: HM Treasury Analysis (2016) HM Treasury analysis: the intermediate economic impact of the leaving of the EU & Centre for Business Research (2016) The macro economic impact of Brexit: using the CBR Macro-Economic model of the UK.

Similarly, notwithstanding final negotiations, the scenario considered for analysis as the closest to the government’s current position is a “Hard” Brexit scenario, that assumes the UK government’s tens of thousands migration target would be achieved and the UK will not remain in the Single Market and Customs Union. Under such a scenario it is projected that long-term the economy will continue growing, but at a slower rate than the expectations before Brexit. Considering the effects that Brexit could have on trade, investment and migration, a recent study by Cambridge Econometrics project that under the hardest Brexit scenario by 2030, London would lose 1.9% (£9.6bn) in GVA, 1.6% of employees (87,000 people), 0.3% in productivity and 4.2% in population.³⁴ Figure 43 below shows the economic loss with a hard Brexit scenario by 2030, compared with the expected economic situation without Brexit for UK, London and Outer London.

³² HM Treasury Analysis (2016) HM Treasury analysis: the intermediate economic impact of the leaving of the EU.

³³ Centre for Business Research (2016) The macro economic impact of Brexit: using the CBR Macro-Economic model of the UK.

³⁴ Cambridge Econometrics (2018) Preparing for Brexit.

Figure 43: Economic impact with hard Brexit scenario by 2030.

Loss with Brexit	UK	London	Outer London
GVA (%)	-3.0	-1.9	-1.8
GVA (£bn)	39.5	9.6	3.0
Employment (%)	-1.4	-1.6	-1.2
Employment (000s)	385.0	84.0	26.0
Productivity (%)	-1.6	-0.3	-0.6
Productivity (£000)	0.8	0.3	0.4
Population (%)	-1.9	-4.2	-3.7
Population (000s)	1146	417	240

Source: Cambridge Econometrics (2018) Preparing for Brexit.

Analysis undertaken by Cambridge Econometrics (2018) also identifies the potential impact by broad sectors on employment and GVA, considering a soft Brexit scenario, and a hard Brexit scenario, with restrictions on free movement for people and trade. Figure 44 below shows these effects on the London and Brent economies by 2030.

Figure 44: Impact of Brexit by broad sectors for London and Brent by 2030

Broad industries	Differences in growth from soft to hard scenarios by 2030		London				Brent			
			Employment (000s)		GVA (£BN)		Employment (000s)		GVA (£BN)	
	Employment	GVA	Soft	Hard	Soft	Hard	Soft	Hard	Soft	Hard
Production	2.2	-0.4	31	32	2.9	2.9	1.29	1.33	0.06	0.06
Manufacturing	-3.7	-5.9	117	113	9.7	9.1	8.51	8.22	0.64	0.60
Construction	-1.9	-6.3	270	265	17.3	16.2	10.56	10.36	0.81	0.76
Distribution; transport; accommodation & food	-4.4	-5.5	1244	1226	72.5	70.9	42.33	41.71	2.55	2.50
Information and communication	-0.5	-1	401	398	61	60	5.00	4.96	0.87	0.86
Finance, Real state and professional services	-2.2	-1.7	1832	1792	292.3	287.4	23.65	23.14	4.29	4.21
Public administration; education; health	0.1	-0.3	1074	1076	44.9	44.8	30.06	30.11	1.14	1.14
Recreation, other services	-5.4	-3.2	302	286	9.9	9.6	5.76	5.46	0.19	0.19

Source: Cambridge Econometrics (2018) Preparing for Brexit, Brent estimations base on NOMIS (2016) Business Register and Employment Survey and ONS (2017 Gross Value Added by Local Authority).

Analyzing key sectors that would be hit hardest by Brexit due to a strong influence on the London economy, EU labour reliance, European funding, or sensitivity to future trading price increases; the research study identifies: financial & professional services, science and technology, creative and cultural, hospitality, food and drink manufacturing and construction. These last sectors of food and drink manufacturing and construction would have a higher impact in Brent due to the weight of both sectors on employment and GVA in the borough.

The construction industry tends to require less skilled labour and employ a larger proportion of EU migrants, with 25% of employees in the sector in London born in the EU. Considering a scenario where free movement of labour within the UK was restricted for EU nationals would likely present a skills shortage in the construction industry, as well as pressure on wages, causing construction firms to face higher project costs and reduce current turnovers, impacting the ability of firms to deliver the new houses and infrastructure projects required to accommodate and support a growing population.

Food and drink manufacturing will have the largest trade impacts across the sectors, as the EU is the main commercial partner for the sector, with expected increases in export and import prices. Similarly, food and drink manufacturing employs a large share of EU workers, making it exposed to supply-side constraints.

UK withdrawal from the EU would also be expected to affect sectors heavily dependent on international trade or transnational supply chains in London. The potential loss of London's tariff-free trade status with the other EU members would imply a disadvantage, as tariffs raise the cost of exports, making London-based companies higher-priced and less competitive compared to companies based in other European metropolitan areas such as Frankfurt which, together with New York, are poised to try and attract some of the financial activities currently taking place in the City. More than a third of the financial services surplus in London comes from trade within the EU.³⁵ The House of Lords European Committee however predicts that London, despite some clear adverse effects of Brexit, will retain its European dominance within financial services.³⁶

New tariff agreements resulting from UK Brexit negotiations could also raise import prices which may lead to higher inflation and a lower standard of living for London residents. Furthermore, London companies could lose their right to bid on public contracts in any EU country, which, under current law, are only open to bidders in other EU member states.

A weaker sterling, however, could bring indirect benefits to local economies like Brent. A more favourable exchange rate boosted the tourism industry in 2017 as more international visitors were encouraged to visit and spend in the UK. According to the latest data from Forward Keys, which monitors flight bookings, international arrivals to the UK would be 9% higher for August to October 2017 compared to the same period of 2016.³⁷

Further to this, the VisitBritain forecast for 2018 is for 41.7 million visits, an increase of 4.4% on 2017; and £26.9 billion in visitor spending, an increase of 6.8% on 2017.³⁸ The influx of tourists, who are also spending more than before, could positively impact the hospitality industries of Brent, which, according to GLA Economics, are anticipated to grow in the future.

Trend 3. Increasing Self-Employment

Although volatile, the general trend between 2005 and 2017 is that economic activity in Brent has risen slightly. Simultaneously, the number of households where no-one aged 16 years or over is in employment is decreasing, see Figure 45. Brent's smaller sample size causes more fluctuation in the data, but the overall trend has been a faster decline in workless households in the borough than in both London and the UK.

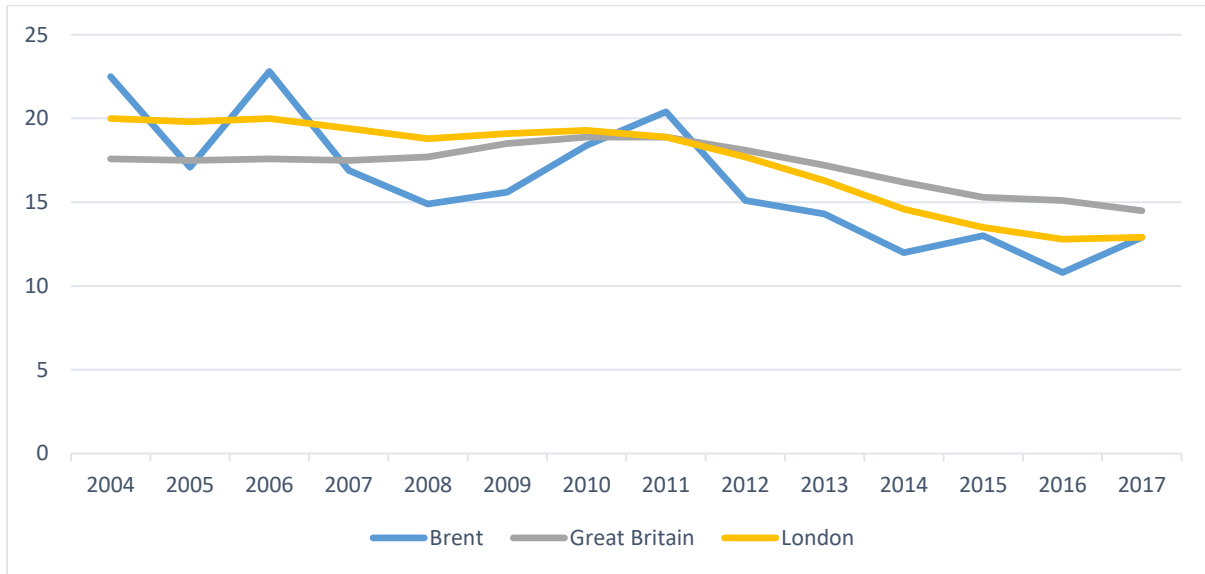
³⁵ BBA Europe 2016

³⁶ UK Parliament: Brexit: financial services inquiry.

³⁷ BBA Europe 2016: <http://www.bbc.co.uk/news/business-40972840>

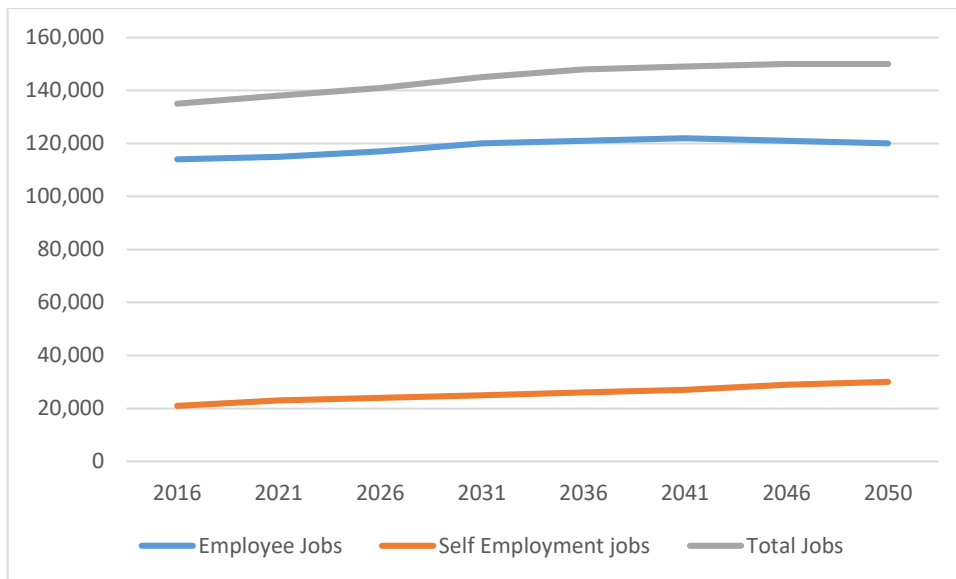
³⁸ VisitBritain 2017: <https://www.visitbritain.org/forecast>

Figure 45: Workless Households Notes, % of total population.



Source: ONS annual population survey - households by combined economic activity status. Members of workless households may be either unemployed or economically inactive.

Figure 46: Expected employment growth in Brent 2016-2050



Source: GLA Labour Market Projections 2017.

The GLA has not produced updated projections of the labour force since the 2010 round. This is because the GLA’s model for creating these projections relied on the results of ONS’s national economic activity forecasts, which were discontinued in 2006. There are, however, estimates of employment growth in Brent until 2036, illustrated in Figure 46.

Between 2017 and 2036, 5,000 new self-employed jobs are projected in Brent, given an annual output growth in London of 2.5%. Employee jobs are anticipated to remain roughly flat until 2030, followed by a small decrease. If these projections hold true, most additional net jobs in the borough will be created through self-employment. This is in line with a general trend of a less secure labour market, which includes observed increased use of zero hours contracts and the rise of the gig economy.

Self-Employment vs. Entrepreneurship

Given the growing number of small businesses in Brent, it is important to make a distinction between self-employment and entrepreneurship. Making this distinction is essential in formulating policies and understanding demands for space, affordability, and possible odds both residents and business owners face. According to Baumol & Schilling, “[a]n entrepreneur is an individual who organizes, operates, and assumes the risk of creating new businesses”.³⁹

The same authors make a distinction between the *innovative* and *replicative* entrepreneur, where the former creates something new whereas the latter starts a business by copying existing products or services. Henrekson and Sanandaji describe entrepreneurship as growth-driven whereas self-employment simply denotes small-business ownership without a focus on innovation or growth.⁴⁰ This distinction is important, as the two definitions often correlate negatively, i.e. areas which, according to this definition, have a high share of entrepreneurs often see a lower proportion of self-employed and vice versa. Based on the demographic profile of Brent, it seems as if a large part of the borough’s economically active small enterprises belongs to the second category. This can be evidenced by looking at the below average qualification level among the population of Brent (Figure 10), and the above average self-employment rate in the borough (Figure 3), thereby alluding that newest businesses are likely to be self-employed, perhaps due to a less secure labour market, rather than innovative entrepreneurs. This is, however, something that needs further research as the effectiveness of policies and interventions to boost entrepreneurship will heavily depend on the profile of the companies.

Several theories exist that seek to explain why self-employment may differ across different groups within a similar geographical area, such as Brent. The *disadvantage theory* suggests that some groups in society are “pushed” into self-employment because of experiencing disadvantages in the labour market. Discrimination or language barriers may, for example, lower the returns to employment for some groups and make them prefer self-employment.⁴¹ According to the *enclave theory*, the geographical concentration of certain immigrant groups in a given area may facilitate the creation of strong entrepreneurial networks, which could, in turn, explain the difference in self-employment.⁴² Both the disadvantage and the enclave theory could be used to describe the socio-economic situation in Brent.

Trend 4. Changing requirements for workplaces

Employment projections for greater London indicate a strong growth in the professional, real estate, scientific and technical sectors until 2036. Together, these sectors account for about 40% of the expected job increases in the city. Other growth areas include the administrative and support services, food service and accommodation, and information and communication sectors – accounting for half of the expected total London increase to 2036.⁴³

In Brent, the construction industry is expected to lose some of its importance in the economic output of the borough.⁴⁴ Distribution, transport and accommodation and food industries will be a more important part of the business activity within Outer London, including in Brent, which

³⁹ Baumol, W. J., & Schilling, M. A. (2008). entrepreneurship. In *The New Palgrave Dictionary of Economics* (Second Edn).

⁴⁰ Henrekson, M., & Sanandaji, T. (2014). Small business activity does not measure entrepreneurship. *Proc Natl Acad Sci U S A*, 111(5), 1760–1765.

⁴¹ Fairlie, R. W., & Meyer, B. D. (1994). *The ethnic and racial character of self-employment*. Working Paper 4791. Cambridge: National Bureau of Economic Research.

⁴² Borjas, G. J. (1986). The Self-Employment Experience of Immigrants. *Journal of Human Resources*, 21(4), 485–506.

⁴³ GLA Economics, 2015. Working paper 67: Updated employment projections for London by sector and trend-based projections by borough.

⁴⁴ EEB 2016 p. 650

is the borough with the second highest share of these sectors, after LB Hillingdon.⁴⁵ Food sectors could also be boosted by weaker sterling, attracting tourists from overseas. In 2009, Brent received an estimated 2.75 million visitors, where the majority were daily visitors and about 10%, 296,000, overnight visitors.⁴⁶ Brent also has the opportunity to capitalise on other tourist attractions including a range of cultural festivals and leisure facilities linked to regeneration at Wembley. Potential growth sectors may also include business services and healthcare, although growth in each of these will be affected by the availability of suitable accommodation and sector-specific issues.

Transport and communications are not only large local employers – they are also essential to supporting both local enterprise in Brent and future economic and labour market growth across London. Future opportunities are linked to investment in local infrastructure – including transport access at Park Royal and continued development in the Wembley area, with the potential to capitalise on and link to other key transport projects in London, such as Crossrail and the proposed expansion at Heathrow. Baseline forecasts suggest that the sector could deliver a net in year increase of 1,000 jobs by 2020, and an increase of £170m GVA per annum.⁴⁷

Circular Economy

According to analysis undertaken by GLA Economics for London Waste and Recycling Board, the movement towards a more circular economy could generate 12,000 net new jobs in London by 2030. Given the fact that Brent is one of the boroughs with the highest share of employment in the circular economy in London (around 5% of the total number of jobs, calculated from GLA Economics data) the number of net new jobs in this sector could be around 600 in Brent by 2030. Regeneration areas, particularly Wembley and Park Royal, offer a key opportunity to incorporate circular economy at the design and planning stage.

In the EU in 2015 repair positions accounted for 76% of all circular economy jobs, almost four times the number of jobs directly related to waste. The European Commission projects that 170,000 new jobs in these sectors will be created by 2030. Waste-related jobs should account for the majority of the growth in jobs.⁴⁸

A WRAP led report published in 2015 found that in addition to creating thousands of new jobs for Londoners, a circular economy in London could be worth at least £7 billion every year by 2036 in the built environment, food, textiles, electrical goods and plastics sectors alone.⁴⁹ The built environment and food manufacturing are sectors in which Brent has particularly high employment figures and which it should look to strengthen.

With air pollution and climate change being key issues Brent has a responsibility and opportunity, along with the other London boroughs, to utilise the wider green economy, for job creation, and business growth, as a force for good. One example of this is a proposal for a CleanTech hub at Old Oak and Park Royal which would be expected to provide local employment opportunities. More generally, carbon reduction targets and moves towards a zero carbon city by 2050, and low carbon economy, will necessitate energy efficiency programmes, and expansion in renewable technologies, with the potential for a boost to local employment including local manufacturing.

⁴⁵ *ibid.* p. 40.

⁴⁶ CLES Consulting and Shared Intelligence 2010.

⁴⁷ *Ibid.*

⁴⁸ How to Win the War on Unrecyclable Plastic. Available at: <https://www.politico.eu/article/circular-economy-jobs-waste-garbage-trash-recycling/>

⁴⁹ Holder. M, (2015).Circular Economy Could Create 40,000 London Jobs by 2030. Available at: <https://www.letsrecycle.com/news/latest-news/circular-economy-could-create-40000-london-jobs-by-2030/>

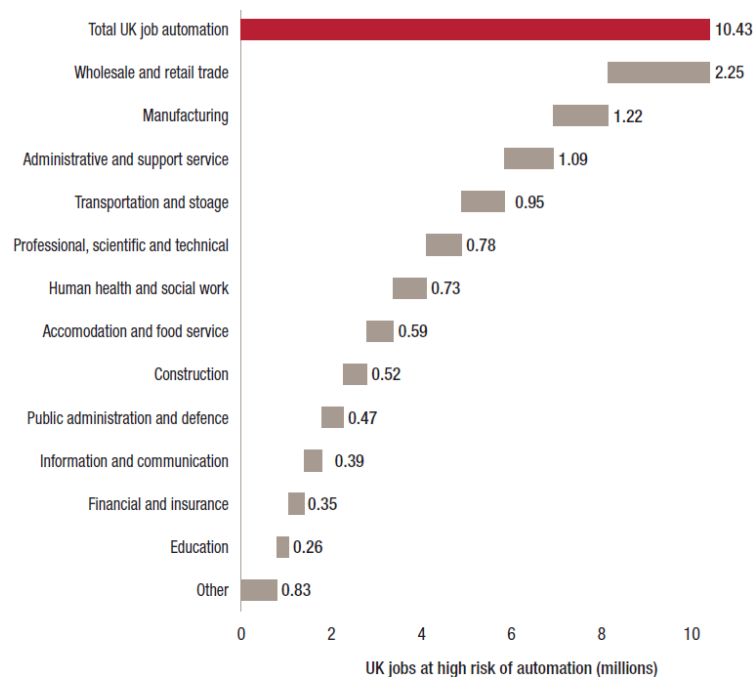
Trend 5. New industrial revolution - Artificial Intelligence and Automation

New technologies are transforming the way people live and work across the world and having important social and economic effects. The new industrial revolution is characterized by a fusion of technologies between the physical, digital and biological spheres in fields such as artificial intelligence (AI), robotics, autonomous vehicles, and 3-D printing.

Technologies like robotics and AI are particularly significant for production industries, due to the potential to increase productivity through the augmentation of the labour force and automation of some roles. Automation is defined as the replacement of repetitive manual and cognitive existing tasks by machines and the utilization of AI systems that can adapt to different situations without human assistance. A report released by PwC forecast that UK GDP could increase 1.9% by 2030 as a result of automation in production industries⁵⁰.

The adoption of these new technologies in production industries creates new jobs where AI assist humans in making decisions, but also losses of existing jobs where automation substitutes human tasks by machines. Therefore, it is predicted that by 2030 AI has the potential to create 80,000 new jobs annually across a population similar to the UK if training and investment required is applied adequately.⁵¹ It is at the same time projected that in the UK up to 30% of jobs could potentially be at high risk of automation by early 2030, equivalent to more than 10 million UK workers that could be replaced by robots⁵². Although, the net impact of automation is unclear due to a variety of economic, legal and regulatory reasons. Figure 47 below shows the expected loss of jobs by industries by 2030 as a result of automation.

Figure 47: Potential jobs at high risk of automation by UK industry sector.



Source: PWC (2017) UK Economic Outlook March 2017, Chapter 4. Will robots steal our jobs? The potential impact of automation on the UK and other major economies.

In Brent, automation in production industries could have significant impacts, due to a third of jobs in the borough being in sectors identified as higher risk: manufacturing with 7% jobs,

⁵⁰ PWC (2017) The economic impact of artificial intelligence on the UK economy.

⁵¹ McKinsey & Company (2017) Shaping the future of work in Europe's digital front-runners.

⁵² PWC (2017) UK Economic Outlook March 2017, Chapter 4. Will robots steal our jobs? The potential impact of automation on the UK and other major economies.

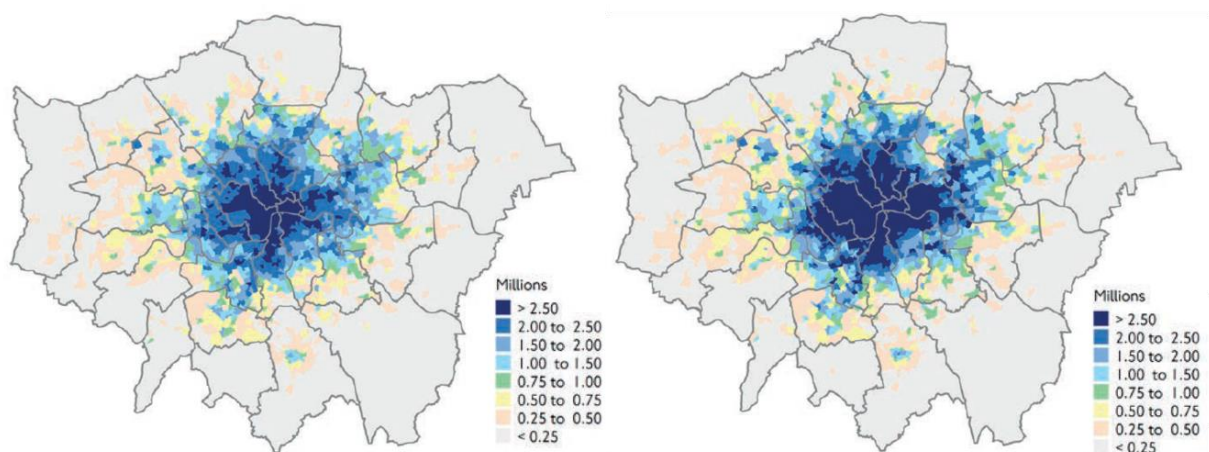
wholesale 8% jobs, retail 10% jobs and transport & storage 8% jobs.⁵³ At the same time Brent's work force population hold qualification levels below the average of London and Outer London and are therefore considered to be at a higher risk of job automation, according to PwC research.⁵⁴ Education and training will therefore be the key differentiating factor to generate new jobs and increase productivity, rather than loss of labour force.

The UK industrial strategy recognizes the importance of investing in maths, digital and technical education to address the challenge that the new industrial revolution will require, through the promotion of national funding to be directed to education, although it is not specified whether Local Authorities could directly receive these funds. The strategy proposes that the UK economy focus moving forward will be on increasing the opportunities to invest in the new industrial revolution, including artificial intelligence and automation.⁵⁵

Trend 6. Higher Job Concentration and Accessibility

This trend highlights the higher concentration of employment in central London and improved job accessibility. Figure 48 illustrates the increase in jobs within a 45-minute commute from different areas between 2011 and 2031.

Figure 48: The number of jobs within 45 minutes from different parts of London in 2011 and 2031 (predicted).



Source: *Transport for London 2015*.

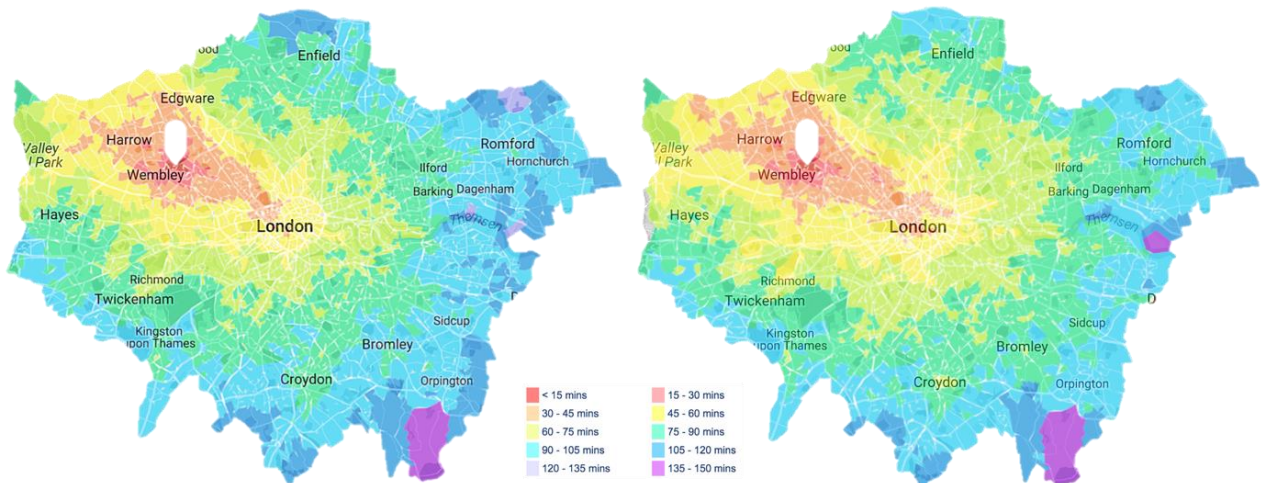
While the outer areas of London, including Brent, are expected to have a similar access, inner London will witness a rapid increase in the number of jobs available.

⁵³ ONS (2017) Business Register and Employment Survey, 2016.

⁵⁴ ONS (2017) Annual Population Survey January 2016- December 2016 & PwC (2017) UK Economic Outlook March 2017, Chapter 4. Will robots steal our jobs? The potential impact of automation on the UK and other major economies.

⁵⁵ HM Government (2017) Industrial Strategy: Building a Britain fit for the future.

Figure 49: Travel times from Wembley Park 2017 (left) and projection for 2031 (right).



Source: Transport for London.

Looking at travel time projections from Brent, there will be an improvement due to Crossrail and High Speed 2 (HS2) which will make the local economy – including skills and attractive areas – more accessible also from other parts of London, especially the central areas. As the number of new jobs in Brent is limited, facilitating the commute to other parts of the city will be imperative, especially the connection to LB Tower Hamlets, the area where the highest number of future jobs are predicted to be localised. With the current projections, these jobs will be accessible from Wembley within an hour.

Trend 7. Industrial and office space pressured by housing demands

Economic demand is not just for labour, employment and skills, but is also for workspace and office floorspace. According to the London Plan, demand for office space in Brent, even in strategic locations, such as Wembley, continues to be constrained and is unlikely to pick up in the short to medium term. While London is currently experiencing an economic boom, with economic activity becoming ever more concentrated in London and the south-east, external shocks, such as Brexit may lead to political and market uncertainty, as well as restrictions to workforce migration which, in turn, negatively effects demand for office space.

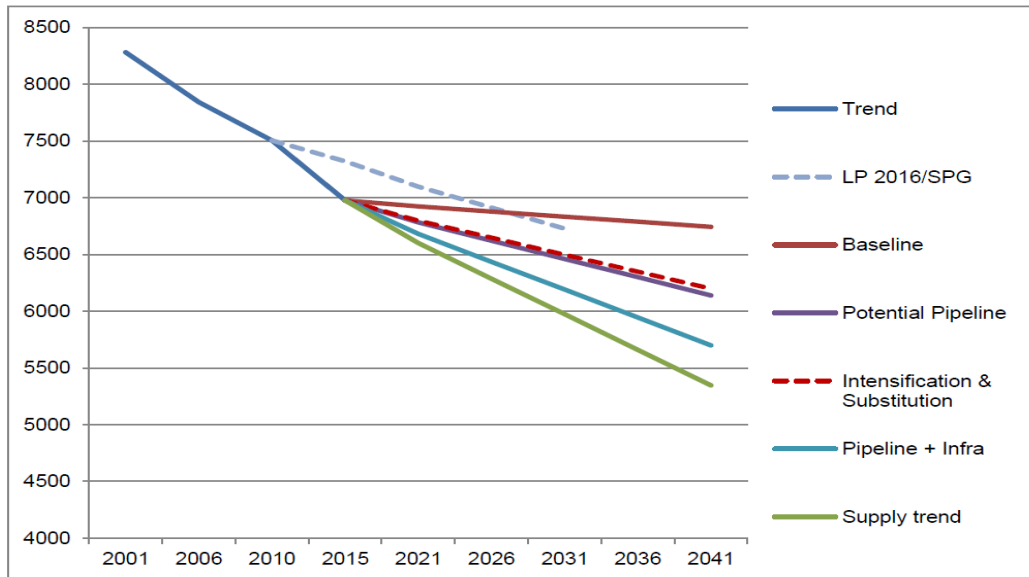
Another possible effect of UK withdrawal from the EU and more expensive imports, highlighted in previous sections, is the potential for the return or greater retention of manufacturing and industrial uses in London and Brent, which, in turn, would require more industrial land. Capacity for new industrial development in London and Brent is heavily dependent on how the service led economy in London will develop moving forward. It is difficult to predict the extent to which the London economy could lose its importance as a provider of high-level global services in the wake of Brexit, but there is a concern that if it does to any significant extent, then it might again need a bigger contribution from industrial activities, which it had prior to the mid-80s. At the same time, London might then become a less attractive place to live or work, relieving pressure for the release of industrial land for housing.

The recent trend has however been of pressure to release industrial land for housing. There are approximately 7,000 hectares of industrial land in London. Over the period 2010-15 the stock of industrial land fell by around 500 hectares, at a rate of 106 hectares per annum, compared with London Plan release benchmark of 37 hectares per annum. Permitted development from office to residential uses has added greater pressure, with 81,700sqm granted permitted development and 20% of those permission implemented as at July 2017.⁵⁶

⁵⁶ LB Brent Article 4 Direction Cabinet Report July 2017

Applying past rates of industrial land loss over the period 2006-15 to the London Plan period 2016-41 would imply the loss of 1,630 ha of industrial land at an average of 65.2 ha per annum if policy and market operation stayed same.. The mid-range pipeline projection, factoring in existing commitments with planning permission and planning designations to release industrial land, is that 837 hectares or 12% of London’s industrial land will be released over 2016-2041⁵⁷.

Figure 50: Industrial Land total stock trend and land release scenarios (ha) 2016-2041



Source: London Industrial Land Demand Final Report

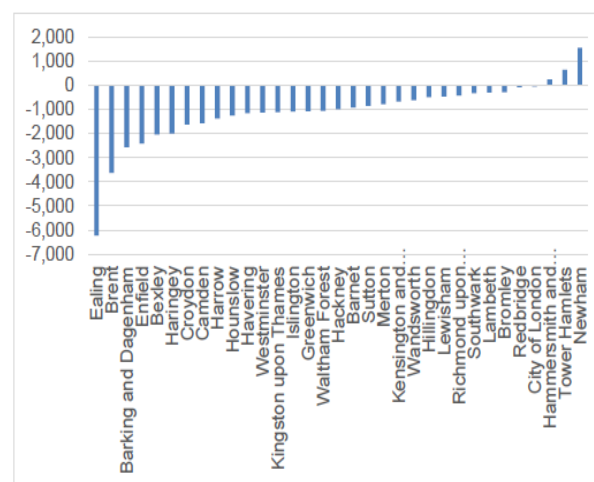
For London as a whole, GLA Economics and CAG estimate that there will be a net loss of 36,000 industrial jobs over the period 2016-41, comprising a loss of around 50,000 manufacturing jobs, partially offset by some growth related to construction activities (Figure 51)⁵⁸. At borough level, assuming sectorial change in line with London forecasts, CAG consultants forecast that Brent will experience one of the largest losses in industrial employment in London, with more than 3,000 jobs lost (Figure 52).

Figure 51: Industrial employment change by broad Sector in London, 2016-41



Source: GLA Economics/CAG

Figure 52: Projected Change in Industrial Jobs 2016-41.



Source: CAG

⁵⁷ CAG (2017) Consultants London Industrial Land Demand Final Report

⁵⁸ CAG (2017) Consultants London Industrial Land Demand Final Report.

Intensification & Co-Location

Possible solutions to the demand for industrial land could come in the form of spatial substitution, intensification or co-location, according to a CAG Industrial Land Demand report and emerging London Plan policy. Intensification is primarily a development response: how to accommodate more activity on the same amount of land. Recent additions of mezzanine floors to some premises could alleviate part of the problem but on a larger scale multi-storey, or underground, warehouses have been tabled as further solutions.⁵⁹ Although previously considered not viable for a city such as London, with values rising and land supply shrinking, it seems a tipping point may have been reached and intensification could become a reality in London and in Brent over the coming years.

From a borough perspective, the OPDC have commissioned studies on how to intensify the Park Royal Industrial Estate to accommodate more floorspace and jobs on the same site. The CAG report claims that although the physical and operational potential for significant intensification exists, there are also possible barriers to delivery, such as fragmentation of ownership, the cost of intensive redevelopment, and high existing use values.⁶⁰ Some form of public intervention may be needed to overcome these barriers for this solution to be viable.

Co-location is also a development response. With the knowledge that much of the pressure from industrial land comes from residential development is there a potential to provide commercial space for industrial activity within mixed use residential environments? As pressure for land intensifies, and work and workstyles continue to evolve, innovative solutions are required. There may be further integration opportunities for work and living to co-exist, beyond the flats we see above shops on our high streets and above artist studios that we see on mixed use developments in Brent. One example could be to redevelop current industrial sites for high density residential and commercial uses where service based activities occur, as these tend to be less intrusive.⁶¹ This would need strategic planning and logistic work to become a reality however.

The less intrusive nature of service activities offers another potential solution to freeing up industrial land. Many of the activities that take place on industrial land across London are not considered industrial. Surveys of major industrial estates across London report that 33% of jobs, and 29% of floor space, is accounted for by the service sector.⁶² Many of these are clean activities that service the London business market and wider London economy in areas such as catering, cleaning, courier services, design, hospitality, marketing, media, office supplies, security, training and similar. With demand for this type of space expected to grow there is the potential for these industries to co-exist not only with residential, as mentioned above, but relocate alongside other businesses and shops on the high street and in town centres. The benefit of this would be twofold. Firstly, it would support the diversification of the town centre, mentioned elsewhere in this report, as it would give the community different reasons to visit the high street and increase footfall. Secondly, it could help to bring down the vacancy rates in Brent's town centres, some of which are running at over 10%.

If intensification, co-location, or even relocation of the service sector are to be taken seriously as potential solutions to utilising Brent's existing industrial land, then it is going to require significant intervention and a holistic joined-up approach from the relevant stakeholders.

⁵⁹ CAG (2017) Consultants London Industrial Land Demand Final Report.

⁶⁰ Ibid

⁶¹ Ibid

⁶² Ibid

Trend 8. Increasing competitiveness challenging business performance

Trying to map the trend of Brent's business performance is about understanding how the borough has been adapting to the profound structural changes that have taken place over recent decades and how robust its economy is relative to the current global economic landscape. This would require looking in depth at areas such as the structure and performance of the business base, entrepreneurship and the knowledge economy, with the aim of better understanding Brent's future potential, however many business indicators are not available at the local level. While a profound mapping of future business trends is clearly beyond the scope of this report, some projections can be highlighted based on existing studies.

Brent has experienced an expansion of its business base that has been close to the growth rate across London, mainly driven by growth in micro-enterprise, and in recent years a small increase in job density figures. However, at the same time, the borough has faced a loss of big local employers.⁶³ There have been clear structural changes across key economic sectors, which should be of interest to policymakers. Looking ahead at future competitiveness, the knowledge economy seems to be strengthening regarding output and employment, but there are still many challenges that need to be met.

As small enterprises continue to grow in numbers, Brent has experienced a loss of larger firms, falling by 6.6% between 2003 and 2008, compared to the average for West London (0.2%), London (2.4%) and nationally (4.4%). Simultaneously, growth in VAT registered business stock has lagged behind the London average, and 1-year business survival rates are falling. While longer term business survival rates (5 year+) have improved significantly within Brent, according to the most recent statistics available, they are still lower than regional and national averages.⁶⁴

Few employers report skills gaps within their workforce, but many struggle to recruit suitably skilled labour. Data from the National Employers Skills Survey, covering firms in Brent and West London, suggests that almost a fifth (17%) of employers within the borough reported skills gaps within their workforce in 2010, compared with an average of 18% in West London, 17% in London, and a national average of 19%.⁶⁵ In the 2015 Survey, which is the latest available at the time of writing this report, the reported skills gap in Brent had decreased slightly to 15%, with a figure of 14% in London and England respectively. However, the manufacturing sector stood out as 29% of all firms in Brent reported skill shortages, corresponding to 390 skill gaps in total.⁶⁶

Employers in Brent also found it harder to recruit from the local labour market during 2009. Over a third (34.4%) of employers reported skill shortages in 2009, higher than the average for London (24.4%) and the national average (21%).⁶⁷ These figures have improved significantly in the latest survey in 2015, where only 24% of all vacancies are due to skill-shortages (London and national average have remained at the same level). Hence, there seems to be a favourable trend where fewer vacancies are caused by skill-shortages in the local market. The number of firms with at least one vacancy that is hard to fill is still twice as high in Brent (16%) than in both London (8%) and England (8%).

Future employer engagement in training remains critical for Brent's workforce, as the proportion of the labour market receiving training up to Level 3 is lower than the London and

⁶³ CLES Consulting and Shared Intelligence 2010

⁶⁴ Ibid.

⁶⁵ UKCES Employer Skills Survey 2010.

⁶⁶ UKCES Employer Skills Survey 2015.

⁶⁷ Ibid. UKCES Employer Skills Survey 2010.

UK averages. This is especially the case for on-the-job training, where it was only offered by 45% of the employers in Brent compared to 53% in London and 52% nationwide.⁶⁸

Town Centre Diversification

Brent's town centres are facing unprecedented challenges including the need to compete with an increase in on-line shopping and competition from other town centres in London, as well as place-based concerns regarding the condition of the public realm and local infrastructure.

The latest data from the ONS shows that Brent has experienced 24% business growth and 10% employment growth in the last 5 years⁶⁹ although, as seen in the previous chapters, this rise is expected to reverse with the uncertainty of Brexit looming on the horizon.

Another sector that has experienced high growth has been business transport which has seen a 56% increase in the last 5 years.⁷⁰ With Cross Rail and HS2 in the pipeline there is a chance this increase will not be negated and may continue to rise. One note of caution would be to highlight that although it is easier to attract visitors to the borough with good transport links, if the local offer in the town centres is not to a satisfactory standard then those same transport links can carry Brent residents out of the borough to shop elsewhere.

Across Brent there are significant growth aspirations, with a need to accommodate a draft new London Plan housing target of 2,915 units per year. There are currently a number of regeneration projects underway across the borough which have the potential to deliver new homes and non-residential floorspace both within and adjacent to town centres.

Growth and development present exciting opportunities for Brent's town centres to diversify their offer, through increased expenditure, and create demand for new services and amenities. However, it is imperative that Brent's town centres and businesses have access to the infrastructure and support they need to evolve and adapt to meet these new markets.⁷¹

Moving forward, opportunities such as the London Borough of Culture 2020, and the legacy this can create, as well as Box Park's arrival in Wembley, offer an opportunity to raise the profile of Brent's town centres both locally and further afield and highlight what an asset they can be. If the town centre is to survive it must be more than just a place to shop but a community hub where people can meet and socialise. A proactive and ongoing commitment to managing and investing in Brent's town centres will be crucial in supporting their vitality and vibrancy.⁷²

⁶⁸ UKCES Employer Skills Survey 2015.

⁶⁹ Brent Town Centres Health Check Assessment 2018, Regeneris, April 2018.

⁷⁰ Ibid

⁷¹ Ibid

⁷² Ibid

Responses – Promoting Long-Term Growth

There is considerable opportunity for growth in employment and businesses into the future in the Brent economy. There are however also clearly risks from competition from elsewhere within London. Here are some suggested responses, starting from a more general level followed by more detailed policies.

1. Encourage More Specialisation

To capitalise on Brexit and cheaper exports due to the depreciation of Sterling, Brent's manufacturing and other industries must move into higher-quality (higher-wage and income-generating) goods production where possible. This, in turn, requires the economy of Brent to become more specialized, which generates economies of scale and higher productivity, creating a comparative advantage relative to other areas of London. While Brent Council can facilitate and support industrial development to a limited extent, the economy must first and foremost "discover" its specializations, through the assemblage of capital and labour resources that work, and with a high dose of entrepreneurship, not simply just self-employment. In supporting entrepreneurship and skills, there is sometimes a conflict between middle-class oriented social policy and poverty alleviation, something that is necessary to bear in mind when designing an Inclusive Growth Strategy. One way in which innovation can be supported is through better banking systems, credit markets and venture capital for middle-class entrepreneurship. Park Royal Opportunity Area has been identified as one area within the borough where further specialisation could be favourable.

2. Develop the Circular Economy in the Wembley Area

The low carbon Circular Economy model is one of the major strategic approaches promoted to reduce climate change and overconsumption, as well as to increase business opportunities. In London, it is expected that low carbon and environmental goods and services will grow by over 6% a year by 2020.⁷³ The circular economy could be integrated into the planning for Wembley as one of the Opportunity Areas of London. The Wembley area includes a significant proportion of the Borough's industrial land in two industrial zones at Wembley and Neasden. Being a Strategic Industrial Location (SIL) they should be protected, promoted and intensified as the main reservoirs of industrial capacity and related activities such as logistics, waste management, and utilities. Here, waste management could be particularly emphasised and developed, creating a green clean tech hub. Such an approach is also in line with the vision of the London Plan, which recognises that London needs to increase its waste processing capacity, with SILs considered a primary source of new sites. Brent, together with other West London boroughs, has prepared a Joint Waste Plan which identifies new sites across the sub-region for processing waste. One new site in Brent, at Hannah Close within the Wembley SIL, has been identified and this is now operational.⁷⁴

Beyond the circular economy, Wembley and Neasden are identified as critical growth areas within the borough, where concentrating and co-locating of office, commercial, industrial and residential development could take place. This would capitalise on key assets and infrastructure, including the proposed West London Orbital line, continue existing plans for development, accessibility, and branding. Investing in too many inflexible office spaces however poses a risk, as demand is slowing and local job growth is expected in small enterprises which may not be able to afford such spaces.

⁷³ GLA (2017) London Environment Strategy.

⁷⁴ Wembley Area Action Plan, 2015

→ Focus on activities that need better quality surroundings, such as research and development, light industrial uses and workspace. This will create a buffer zone between the non-industrial uses proposed for the SIL and allow for both regeneration and industrial development. By profiting from the growth in the circular economy, Brent could focus on combining waste management with green tech development.

→ Due to the weak demand for office space, which might remain low after the country leaves the EU, the council should consider shifting more focus to industrial use related to the identified growth areas.

3. Diversification of Town Centres and Intensification of Industrial Land

In the current economic climate and with significant retail growth outside the borough boundaries, there is little likelihood of attracting significant retail or office growth to other local town centres in Brent other than in and around the Wembley area. This suggests these centres will need to diversify, while building on their role as local service centres, and expand employment as and when local opportunities arise, such as through supporting the growth of the evening and night time economy, and utilising vacant premises by attracting the clean service sector from industrial estates to fill these voids. This will help these local town centres push up dwell time and footfall and has the potential to make them thriving community hubs.

Intensification and co-location are possible solutions to the demand for industrial land for housing without losing key industrial space, including the potential to redevelop non-intrusive industrial sites into mixed use premises - residential flats above industrial workspace. Firms have demands for such things as factors and locational qualities: this defines their demand for locations or places. Where possible, a mixed-use and transit-oriented approach should be adopted to improve the public realm and generate residential opportunities to support the high levels of housing demand in Brent and reduce the pressure this places on industrial land.

4. Improve Local Skills

Up-skilling the local workforce remains fundamental to future economic prosperity in the borough. Technological changes such as automation in production industries; political decisions including Brexit; and an ageing and growing population in Brent should demand higher investments in training and education.

The Council should work with employers and education providers to invest in the types of education and training required to maintain competitiveness, increase productivity and reduce the risk of increased unemployment in the Borough. Understanding market needs will be key through conversations with business, place-based strategies centred around university research centres, science parks and other enablers of business growth.

Brent's low-skilled population is the most at risk and the key will be to increase people's qualifications, above GCSE levels, to help reduce automation and Brexit impacts in the labour force. Maths, digital and technical skills are being mentioned by the UK government and should be increased according to the industrial and productivity strategy for the region⁷⁵. The ageing population should also have access to digital skills and business managements; as well as the opportunity to transfer their expertise, skills, and knowledge to younger generations. This would increase the benefits of the silver economy in Brent and give others the chance to share their experience.

⁷⁵ HM Government (2017) Industrial Strategy: Building a Britain fit for the future.

5. Increase female population in the labour force.

Encouraging a higher proportion of the female population of Brent to seek employment remains a challenge for the borough. Family responsibilities are the main reason for inactivity of EU women aged 25-54 years old.⁷⁶ It is plausible that the high ethnic diversity within Brent, the gender pay gap, as well as the lack of accessible and affordable childcare options, could all contribute to the reason a large number of females stay at home and look after the family.

A 2015 report on increasing female participation in the workforce concluded that business communities and society as a whole should be open to creating more flexible work environments, promoting work-life balance and diversity, and boosting female representation in management.⁷⁷

If communicated correctly, the recent implementation of various public policies ranging from free childcare facilities to statutory rights to shared maternity / paternity leave could alleviate some barriers to gender equality moving forward. However, further analysis of the local situation in Brent would be beneficial in addressing the challenge of female participation in the labour market.

6. Support Small Businesses

Most of the employment in the borough is in small and medium-sized enterprises (SMEs), underpinning the resilience of residents. Supporting these businesses to grow, identifying opportunities and developing local supply chains is vital to the Employment, Skills & Enterprise service. New start-up spaces will be needed to support and attract local entrepreneurs, and the burden of bureaucracy for local businesses needs to be reduced.

→ There is evidenced strong demand for workspace in the borough⁷⁸ and a market picture of rising commercial rents, hardening commercial yields, and increasing difficulty for SMEs and microbusinesses to access affordable commercial space in LB Brent and wider London. The Council should continue to protect existing workspaces, and plan and encourage the delivery of a range of different types and sizes of new workspaces, in the right locations, to accommodate business needs and support employment in the borough.

→ Future opportunities for workspace growth are considered strongest and should be promoted within town centres and employment areas – particularly in the south and centre of the borough – reflecting the fact that these locations tend to accommodate factors important for both workspace operators and businesses: connectivity, strong amenity, and existing business clusters and networks.

→ The Council delivers new workspace through the planning system, with creative artist studios developed in the Wembley and Alperton growth areas, and is securing a pipeline of new workspace on employment sites designated for redevelopment or protected for industrial purposes. As noted however, development pressure on industrial land and permitted development of office space to residential continue to squeeze out employment uses, and the Council should advance beyond its vanilla approach of securing workspace at 50% market rates for workspace providers and seek to develop policies, partnerships and delivery models to expand the provision of workspace in the borough.

⁷⁶ Eurostat (2017) People outside the labour market. Available at: http://ec.europa.eu/eurostat/statistics-explained/index.php/People_outside_the_labour_market#Family_responsibilities_main_cause_of_inactivity_of_women_aged_25-54

⁷⁷ Fang Guo (2015) How to Encourage Women into the Workforce. Available at: <https://www.weforum.org/agenda/2015/03/how-to-encourage-women-into-the-workforce/>

⁷⁸ Regeneris (2017) Brent Workspace Study

→ Enterprises Hubs: there is currently particular pressure on low-cost office space for business start-ups (i.e. new or emerging businesses). As shown in previous sections, self-employed jobs are anticipated to account for all additional net jobs in Brent until 2036. It is appropriate, therefore, as an alternative to office-based employment concentrating on larger employers, to provide new low-cost workspace for business start-ups and smaller enterprises. These spaces can be organised in clusters in appropriate locations, or as a unified platform or hub at a centralised and accessible area of Brent, to foster communication and collaboration among the resources already existing in the borough.

→ Provision of Incubator, Accelerator and Co-working spaces (IACs) in larger hub locations is encouraged to provide a range of different and flexible spaces for microbusinesses and SMEs, together with business support packages, including business administration, legal and accountancy services, training, mentoring and networking, shared facilities, as well as access to finance. Options to attract or make links with Higher Education Institutes (HEIs) and graduate placements should be explored to establish research and development capacity. One such hub is planned in Wembley, which has excellent transport links and potential for development, and which would contribute to the regeneration's vitality by further expanding it beyond typical office and commercial uses

→ Because of anticipated weak demand for office buildings, new workplaces should adopt a flexible approach to re-use of redundant and underutilised office floorspace. This is also important in order to promote mixed-use and transit oriented development, which forms a vital part of a vibrant, attractive and sustainable development of Brent. A micro scale platform supplies a creative space that will be shaped by the various needs of the local business community. The platform should be a space that can accommodate and facilitate the trends in Brent and other areas of London: project work, rapidly changing occupations, and the need to hire specialist contractors at short notice.

→ Prioritise small enterprises with growth potential. If levels of public funding for business support and environmental improvements are insufficient, the Council will need to maximise its support for local business-led programmes, and identify opportunities to direct any funding that is available towards local priorities. Supporting small enterprises with growth potential is key. This could be done through competitions and acceleration programmes involving different stakeholders at local, regional, national and global level.

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Brent Inclusive Growth Strategy (IGS): Education and Skills

2019-2040

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Executive Summary

Anticipated changes in demographics, employer demands, technology and changing lifestyles in Brent over the next 20 years will present both challenges and opportunities for the future of education and skills provision in the borough. The Council has a critical role to play in ensuring that residents attain the skills and qualifications that will allow them to access the high skilled jobs which will dominate London's future labour market.

Brent's ability to provide and facilitate high quality, effective education and skills development for residents across the life course will have important implications for the labour market outcomes of its residents as well as for the economic prosperity of the borough, West London and the city as a whole.

Baseline

To understand the future of education and skills provision in Brent the report starts with a baseline for the current provision in the borough considering: early years, primary, secondary and post 16 education, apprenticeships, higher education, NEETS, vulnerable groups and the black attainment gap. While also outlining some key policy which has impacted the education and skills sectors. Key findings from the analysis include:

- Brent has a growing population and is experiencing faster growth in the population of children aged 0-19 years (particularly for 0-4 year olds) and especially so in the Wembley and Harlesden areas, which are areas characterised by high levels of deprivation. Brent's growing young population has the potential to offset the impacts of the ageing population.
- Take up of the free entitlement provision for 3 and 4 year olds in Brent has declined for the last 3 years mirroring a London-wide decline. England averages for take up have been consistent at 95% for 3 and 4 year olds since 2012.
- The attainment of Black Caribbean boys is still very low compared to national averages.
- 94% students in Brent went on to sustained education or employment/training⁷⁹. 78% of students go on to further education, a greater percentage than the West London average (76%).
- 69% of pupils in further education in Brent go on to higher education institutions, a higher rate than England (56%) and Outer London (63%).
- In 2016, the unemployment rate for Black Caribbean and Black African young men (aged 16 to 24) was 29%, almost double the average unemployment rate for all young men (15%).
- In July 2017, the Government confirmed plans for 15 routes in a Post-16 Skills Plan. The Plan promises to transform vocational education, providing a technical equivalent to the academic focused A-levels.
- The Apprenticeship Levy – a hypothecated tax on larger employers with payrolls above £3 million to fund apprenticeships – is leading to many employers in London looking either to offer apprenticeships either for the first time, or to increase the number they already provide.
- The Government is planning to introduce Institutes of Technology (IoTs): institutions offering higher level technical education and training to young people and to those already in employment.

⁷⁹ which includes pupils who have been in a combination of sustained education, employment / training for the first two terms (October to March)

- There is no higher education presence in Brent, however there is a large student population living in Wembley.
- London faces significant skills challenges in the coming years, which will be impacted by the potential effects of the UK leaving the European Union. Brent has the third largest EU population amongst London boroughs, which makes up 20% of Brent's working age population, would expect to be particularly affected by any negative migration restrictions or departure of EU nationals.
- Brent has larger manufacturing and construction sectors, 7% of London's manufacture workers and 6% of construction employees live in Brent. This sector is predicted to decline over the next 20 years. While, other areas like information and communication are projected to see strong growth.
- 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 the same rates as the white population at 71.9% compared to 71.9%⁸⁰.
- State pension age for all individuals will increase to 66 by October 2020 and to 67 by 2028, under the schedule established by the Pensions Act 2014. Employment of workers over the age of 50 years has grown significantly over the past decades.
- The employment rate for people aged 50-64 years has grown from 55.4% to 70% over the past 30 years, an increase of 15%. The proportion of people aged 70-74 years in employment has almost doubled over the past 10 years (from 5.5% to 9.9%).
- Automation is going to impact the labour market between now and 2040. Some jobs are likely to be more at risk than others, for example, 60% of retail jobs in the UK are forecast to be lost by 2030 through technological change, while education, health, care, business services and the creative sectors will grow.

⁸⁰ Annual Population Survey 2018

Trends

This report considers how education and skills provision in the borough will need to evolve in order to address both the challenges and opportunities presented by the following trends:

1. Changes in employment demand with most new jobs in London expected to take place in knowledge sectors, and be professional in nature.
2. The rise of self-employment & the gig economy.
3. The potentially disruptive effects of technological advances such as automation, 3D printing and artificial intelligence.
4. Mismatch of employees' skills, needs and qualification levels to the job market.
5. Demographic changes and uncertainty around the future school funding and demand for school places may influence the quality and provision of schools.

The implications of these trends include:

- An increased demand for adult learning; from workers who lose their jobs through automation, creating a surplus of workers with lower-level qualifications looking to retrain, as well as an increase in 16-24 year olds key learning cohorts.
- Education and skills provision will need to provide qualifications and upskilling opportunities which are relevant to a future economy dominated by high skilled sectors, particularly related to Science, Technology, Engineering and Mathematics (STEM).
- Groups which disproportionately have low educational attainment levels and poor labour market outcomes (i.e. care leavers, lone parents, certain BAME and vulnerable groups) will be further marginalized and disadvantaged in the increasingly polarized labour market. Without effective education and skills provision, this has the potential for negative long term economic implications for Brent and its residents.
- A lack of school places will impact the quality of education provided in Brent.

Responses

The report concludes with some potential responses to these trends, responses include:

Fostering greater partnerships between employers, education providers and businesses to address skills shortages in the UK. The policy focus on technical education with T Levels and Apprenticeships should be used to strengthen links between education, employment and the local area. The Apprenticeship Levy should also help ensure that companies are more involved in training. Measures should be taken to create a stronger focus on STEM education and on areas where the economy is projected to grow.

Utilising parent champions to conduct a borough wide campaign to increase the uptake of 3 and 4 year olds free entitlement to early education and childcare and access to employment. Increase the access to employment and training for mothers and harness the benefits of early years' education for children.

Encouraging businesses to boost career progression and upward movement of workers to prevent skilled workers being trapped in low paying, low skilled positions and to prevent workers being pushed into indefinite part-time careers. The Adult Education Budget needs to be utilised to ensure that people are given opportunities to work in emerging sectors.

Up-skilling the local workforce is vital for future economic prosperity in the borough. Technological changes such as automation in production industries, political decisions including Brexit, and an ageing population in Brent, demand higher investment in training and

education. The benefits of a skilled workforce for Brent include greater productivity and resilience, and a higher GVA.

An increased focus on careers advice can help to support people know, understand and explore the employment opportunities that are available to them. As well as providing advice and guidance on the impacts of emerging sectors including the “gig economy”.

Understanding the impact of technology and automation in order to harness the benefits and mitigate the issues related to its introduction. Brent Council, working in partnership with the West London Alliance, GLA, the College of North West London, employers and others, must build a dynamic and flexible upskilling programme for displaced workers and other low skilled workers.

Reducing the mismatch of skills in the jobs market by encouraging employers to allow employees to shape their jobs to meet their needs and utilise their skills. Camden Council has addressed barriers to employment by engaging with employers to identify adult apprenticeship opportunities. Adult apprenticeships are designed to present an affordable and attractive solution for parents and employers. These apprenticeships offer flexible hours and pay the living wage (through Council subsidy) ⁸¹.

To look at innovate ways to design and expand schools to deal with the fluctuation in demand for school places.

⁸¹ Interim Evaluation of an adult apprenticeship programme: Camden Council 2015

Introduction

Over the next 20 years, London's labour market will continue to be transformed as a result of technological advances, changes in employer demands and demographic changes. Brent's ability to provide and facilitate high quality, effective education and skills development for residents across the life course, from pupils to adult learners, will have important implications for the labour market outcomes of its residents, as well as for the economic prosperity of the borough, West London and the city as a whole.

This report outlines the role of Education and Skills in contributing to Inclusive Growth in Brent from 2019-2040. It considers how Education and Skills provision in the borough will need to evolve in order to address both the challenges and opportunities presented by the following trends:

1. Changes in employment demand with most new jobs in London expected to emerge in knowledge sectors, and be professional/managerial in nature.
2. Potentially disruptive effects of technological advances such as automation, 3D printing and artificial intelligence.
3. Mismatch of employees' skills, needs and qualification levels to the job market.
4. Long-term, chronic underfunding of childcare may impact workforce participation opportunities for parents and low income families.
5. Demographic changes and uncertainty around the future school funding and demand for school places may influence the quality and provision of schools.

The report is organised into Baseline, Trends and Responses. The **Baseline** section presents the context which defines the current status of Education and Skills in Brent, this will look at education provision in Brent, the policy landscape and changes in ways of working. Second, the **Trends** section identifies and analyses key trends and the anticipated challenges and opportunities presented by them for Education and Skills provision and its related subthemes. Third, the **Responses** section presents potential strategies and policy choices that can address the challenges and create opportunity for Brent and its residents to prosper in the coming years.

Baseline

Consideration of Education and Skills provision in the future must be founded on an understanding of the current provision offer; gaps that exist today could be exacerbated in light of current and future trends. The Economy theme will provide a comprehensive overview of trends impacting employment demand, including likely employer demands moving forward. Analysis in Education and Skills theme will focus on the current education and skills supply and provision available within the Brent labour force and local educational establishment.

Education across the Life Course in Brent

Early Years

High quality childcare can help support parent employment, reduce the effects of social disadvantage and provide children with a better start to school. Early years and basic education is the prerequisite for later literacy skills, such as reading and writing. By the age of five, a child's vocabulary will affect their educational success and income at the age of 30⁸². Therefore, investing in good quality pre-school provision can be seen as an effective means of reducing poverty and addressing the impacts of government reforms to welfare and housing⁸³.

Maternal employment in London is the lowest of any region in the UK: 65.8% compared to 73.7% nationally in Brent it is 56.8%. Low maternal employment in London partly reflects differences in employment patterns, skill and qualification levels, cultural preferences and other barriers in access to work experienced by different ethnic groups. Alongside this, low maternal employment is largely a result of high childcare costs, inflexibility of provision and a lack of flexible working opportunities.

There is not currently a sustainable funding agreement that can support the implementation of the expanded free childcare entitlement. Local Authorities, already under pressure as a result of budget cuts, will lack the resources to provide sufficient high quality places in the absence of long-term funding, undermining the sustainability and quality of provision offered⁸⁴. This will be a particularly pressing issue for low-income families impacted by welfare reforms, at risk of poverty both in and out of work. Brent's efforts to promote and maintain sufficient quality childcare takes place in the context of growing demand. This is a result of population growth in certain parts of the borough; diversity and variance in take up of the childcare entitlement among certain ethnic populations, the expansion of the early education entitlement and the impacts of changes to benefits. All of which make it more challenging for many low income ethnic minorities to balance work and care⁸⁵.

The following are characteristics of Brent which shape the context in which education in early years and beyond takes place:

- 86.5% of school children in Brent are BAME. While the largest ethnic populations are Indian, Somalian, Caribbean, White British and Eastern European, these account for less than half of all children living in Brent. The highest population share of children in primary and secondary schools in Brent are Indian at 15.8%.
- Brent is the second most ethnically diverse local authority area in the UK. Research finds that some ethnic groups are much less likely to use registered childcare.

⁸² National Literacy Trust 2016

⁸³ Brent Childcare Sufficiency

⁸⁴ IPPR, The future of childcare in London: Devolving funding for greater affordability, access and equality 2017

⁸⁵ Poverty And Ethnicity-Balancing Caring And Earning For British Caribbean, Pakistani And Somali People

- Brent ranked the 49th most deprived local authority in England in 2019, improving upon the 39th ranking in 2015 (2019 IMD initial findings). 5% of the LSOAs in Brent are in the most deprived 10%; the most highly deprived areas in the borough are concentrated in Stonebridge and Harlesden.
- Brent has a growing population and is experiencing even faster growth in the population of children aged 0-19 years (particularly for 0-4 year olds) and especially so in the Wembley and Harlesden areas, which are areas characterised by high levels of deprivation⁸⁶. However, this does mean that Brent has a growing young population which will offset the impact of the ageing population.

In 2018, 96% of private, voluntary and independent (PVI) childcare providers, childminders and maintained settings, including nursery classes in schools and stand-alone nursery schools, are judged as good or outstanding by Ofsted. This reflects a substantial improvement from 2014. However, changes in the policy context surrounding the provision of early years' education pose challenges for the borough. Developing places for the expansion of the entitlement for childcare for 2 year olds has proved challenging for Brent, as in many areas across the country. The main focus over the last few years in the provision of school places has been to address acute shortage of school age places rather than use existing space to develop more childcare provision in schools.

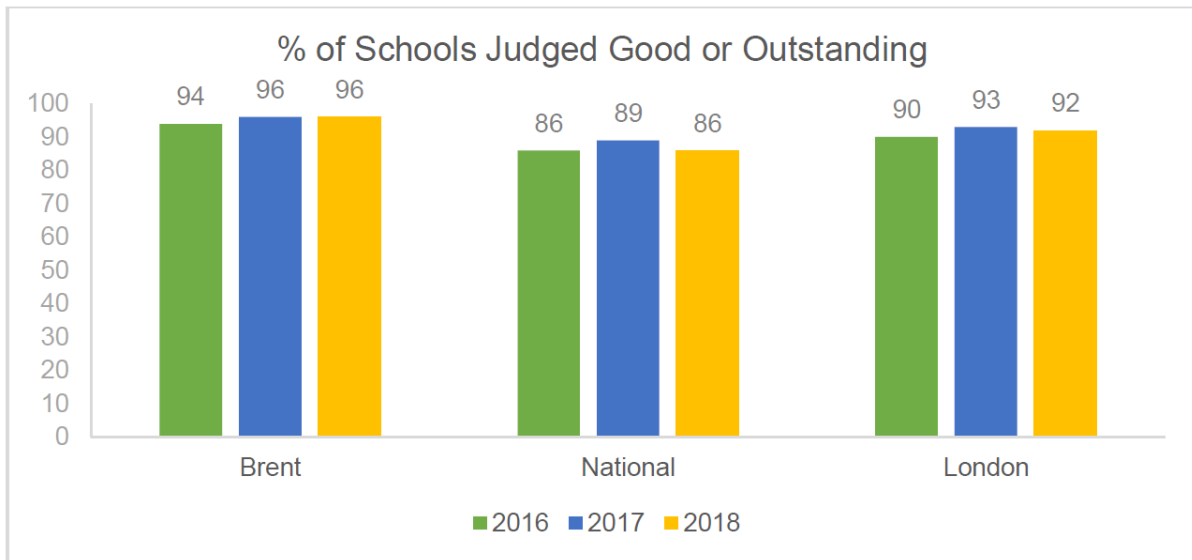
From September 2017, the government proposed to extend the free childcare entitlement for 3 and 4 year olds to 30 hours per week for working parents. This will also have some impact on the provision of childcare. The last release of these figures (June 2017) indicated take up in Brent as at January 2017 was 80% for 3 and 4 year olds. Take up of free childcare entitlement provision for 3 and 4 year olds in Brent has declined for the last 3 years, mirroring a London-wide decline. In contrast, the June 2017 release of figures from the Department of Education showed take up of 2-year-old free childcare entitlement places increased from 45% in 2015 to 59% as at January 2017. Given the benefits of quality childcare, the Council is committed to increasing take up of the childcare entitlement.

Primary and Secondary School

Brent's overall educational performance continues to improve. In 2018, Key Stage 2 performance for Brent was in line with national average (63% compared to 64%); however, there was a 56% gap between the highest proportion of pupils attaining the expected standard in reading, writing and mathematics (RWM) and the school with the lowest. In the same year, 69.7% of Brent students achieved 9-4 (A*-C) in English and Mathematics, which is above the national average (64.4%) for the first time.

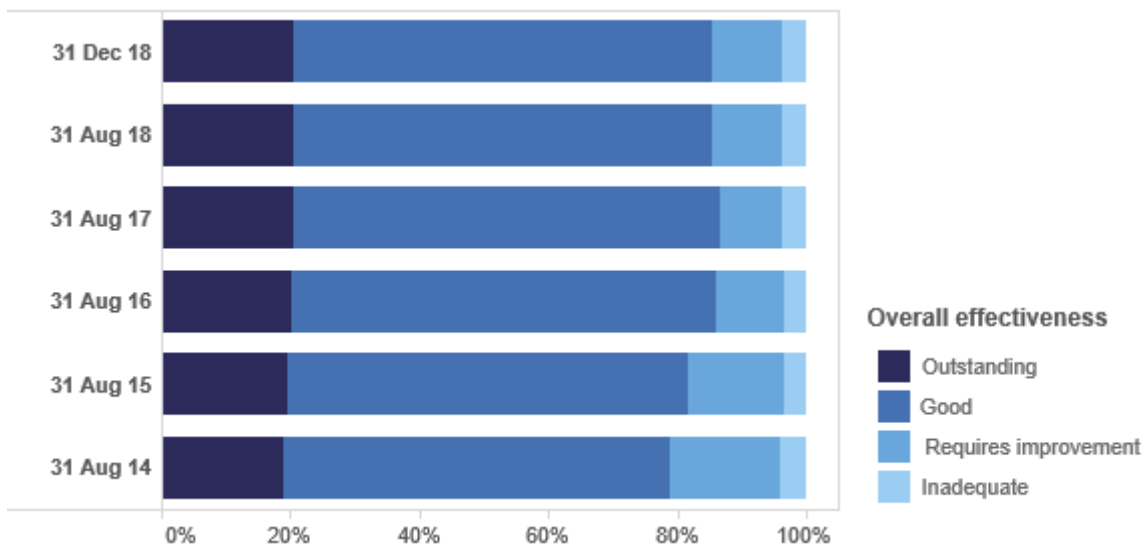
⁸⁶ London Borough of Brent Childcare sufficiency assessment 2018

Figure 53: Ofsted School Effectiveness (2018)



Source: Annual School Standards and Achievement Report 2017-2018

Figure 54: Brent School Performance 2014-2018



Source: Tableau Public Ofsted Local Authority Areas

In 2018, Brent performed very well against the national and London averages for all of the secondary headline attainment and progress measures. For the headline Progress 8 measure, Brent is the 2nd highest out of 151 Local Authorities in England for the second year running, making it the most consistently high performing local authority in the country. 12 out of the 13 secondary schools with reported data were above the national average and 11 schools are at or above the London average. However, there is a 1.97-point gap between the highest (1.9) and lowest (-0.07) performing schools (excluding SEN schools). In addition, although Progress 8 scores are 0.54 for all pupils in Brent, significantly higher than the national average, scores vary by ethnicity – with Black pupils markedly (0.09) lower than all other demographic groups.

Three groups have been identified as current priorities for the council: Black Caribbean boys, Somali boys and girls, and Travellers of Irish heritage. The Black Caribbean group continues to be well below national averages, and the attainment of Black Caribbean boys is still very low compared to national averages despite the increase in attainment at Key Stage 2. The attainment gap for the Somali group has closed over recent years but in 2016 and 2017 was just below national averages, and below for attainment in 2017 for this group nationally at the end of Key Stage 2. Last year, the outcomes for the small group of Travellers of Irish Heritage improved significantly at primary level, but were still poor at secondary level⁸⁷.

In June 2018, Brent Schools Forum allocated £561,750 of funding over a 2 year period to support the attainment of pupils from Black Caribbean heritage. The initiative proposed continued analysis of Black Caribbean pupils performance and the effectiveness of schools' practice; the designation of Black Caribbean Achievement Champions; a programme of training for staff and school governors; and developing online learning resources⁸⁸. The aim is that practice will be embedded to ensure sustainability and after 2 years there will be a measurable impact in the outcomes data for boys of Black Caribbean heritage.

Another key issue for Brent is the wide variation in the attainment of pupils at different schools and among specific ethnic minority groups in both primary and secondary school.

Figure 55: Brent Key Stage 4 Results by School 2018

School	Cohort	Attainment 8	Progress 8	Grade 5 or above in Eng & ma	EBacc APS
Alperton Community School	221	43.9	0.47	40%	3.93
Ark Academy	161	49.9	0.37	49%	4.59
Ark Elvin Academy	157	33.6	LOWCOV	20%	3.21
Capital City Academy	188	43.1	-0.07	37%	3.65
Claremont High School	246	55.5	0.72	64%	5.21
Convent of Jesus and Mary Language College	165	44.9	0.08	30%	4.12
JFS	287	64.5	1.01	75%	6.00
Kingsbury High School	307	45.5	0.23	42%	4.45
Newman Catholic College	81	39.2	0.17	31%	3.58
Preston Manor School	240	53.4	0.74	58%	5.10
Queens Park Community School	200	49.2	0.16	49%	4.33
St Gregory's Catholic Science College	185	54.8	0.46	61%	5.15
The Crest Academy	183	44.3	0.51	50%	4.06
Wembley High Technology College	205	67.1	1.9	82%	6.34
Brent	2858	49.9	0.54	50.9%	4.63
National		46.5	-0.02	43.0%	4.03

Below National
Above National

Source: Annual School Standards and Achievement Report 2017-2018

⁸⁷ Brent Annual School Standards and Achievement Report 2016-2017

⁸⁸ Brent Council (2019) Improving Educational Achievement of Black Caribbean Boys Heritage in Brent, Community Wellbeing Scrutiny Committee

Post-16 Education

In 2018, 94% students in Brent went on to sustained education or employment/training destination⁸⁹. 78% of students go on to further education after school which is higher than the West London average of 76%.

Adult skills provision is funded mainly, although not exclusively, through the Skills Funding Agency (SFA) and delivered by the College of North West London and – to a smaller scale – Brent Start, the Council’s adult community education and training service. Both the College and Brent Start are on improvement trajectories and both are now driven by a key objective of improving employment outcomes amongst their client groups. The College of North West London recently merged with the City of Westminster College, with potential for a further expansion of their multi-college group to include South Thames College and/or Lambeth College, subject to decisions taken by those colleges and the relevant steering groups. The following recommendations for the College emerged in the West London Further Education Area Review⁹⁰:

- The ‘combined curriculum’ offer from the newly merged college will significantly enhance and broaden both the provision and progression opportunities for learners, in key areas such as engineering and construction. These are strengths at both colleges and new provision will complement rather than compete to establish enhanced progression and capacity across building services, technical and civil engineering, including higher level training.
- Each college has new build or refurbished campuses, or plans to create them providing a wide range of *high quality learning environments*. The new college will be able to provide a broader and more coherent offer to employers with a single point of contact. This will provide an increased range of apprenticeship opportunities and other provision responsive to employer needs.
- With regard to financial sustainability, initial financial assessment has shown that the merger would considerably improve financial resilience enabling the merged college to progress towards achieving the benchmarks.
- In respect of quality of provision, both colleges are currently rated as good by Ofsted. The merged college will benefit from the strengths of each college and the sharing of good practice to drive up standards further.

The merger will enhance the colleges’ specialisms and includes key areas that have been identified by GLA including construction, engineering, IT, ESOL and provision for learners with high needs.

Apprenticeships

Apprenticeships provide a combination of work and study by mixing on-the-job training with classroom learning. An apprentice is employed to do a real job while studying for a formal qualification, usually for one day a week either at a college or a training centre⁹¹. Apprenticeships are central to the Government’s vision to improve skills, build sustainable growth and support career progression. Apprenticeships are employer-led: employers set the standards, create the demand for apprentices to meet their skills needs, fund the apprenticeship and are responsible for employing and training the apprentice⁹².

⁸⁹ Department for Education’s Key Stage 4 destination measures

⁹⁰ West London further education area review report 2017

⁹¹ Prospects 2017

⁹² Apprenticeships Evaluation 2017: Employers

The College of North West London is a leading provider of apprenticeships in Brent. They provide apprenticeships in a variety of sectors with the core industries for which they currently provide apprenticeship training including:

- Construction and Building Services Engineering
- Motor Vehicle Engineering
- Health and Social Care and Child Care
- Catering and Hospitality
- Hairdressing and Beauty Therapy
- Business and Administration

In 2014/15, colleges in the West London review area delivered 5,530 apprenticeships⁹³. There were 17,330 apprenticeships delivered in West London in the same period 66% were at intermediate level and 32% were at advanced level. There were 320 higher level apprenticeships delivered. Ealing, Hammersmith and West London College was the largest contributor of higher level apprenticeships.

Overall, the most popular sector subject areas were business, administration and law, engineering and manufacturing technologies, health, public services and care, and retail and commercial enterprise. There were 25 independent training providers publicly funded in 2014/15 to deliver apprenticeships within the 7 London boroughs in West London. These providers delivered 11,560 apprenticeships between them. The review advised that colleges take account of the market position held by other providers, in setting their apprenticeship and other curriculum strategies.

Higher Education

There is no higher education presence in Brent despite there being a large student population, particularly concentrated in Wembley. In 2018, 45.2% of 25-64 year olds in Brent were educated to degree level or above, below the London level of 57.6% but higher than the England level at 43.2%. 68% of pupils who do go on to further education go to higher education institutions, higher than the rate across England (59%) and London (66%). In addition, 22% of this group go onto Russell Group universities, again higher than in England 17% and in London 19%.⁹⁴

NEETS

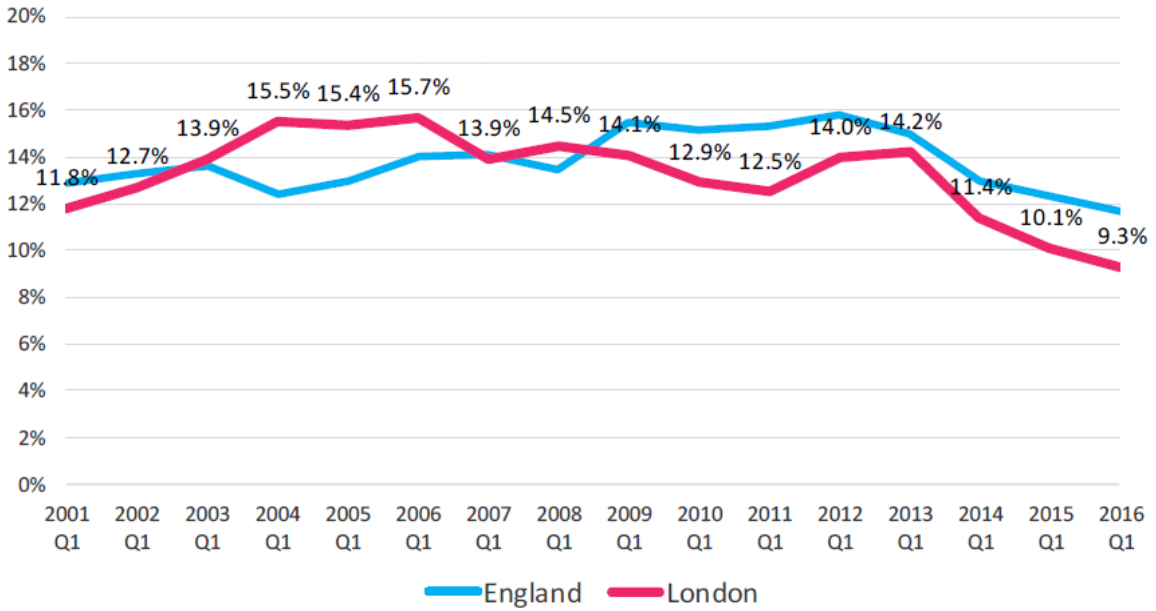
The Borough has a relatively low number of 16-17 year olds who are not in employment, education or training (NEETs) particularly when compared to the London average⁹⁵. Support for this group of Brent residents is delivered under the Youth Contract by Prospects and Catalyst Housing.

⁹³ West London further education area review report 2017

⁹⁴ FE and HE destinations of KS5 students, Borough and Institution ONS 2016

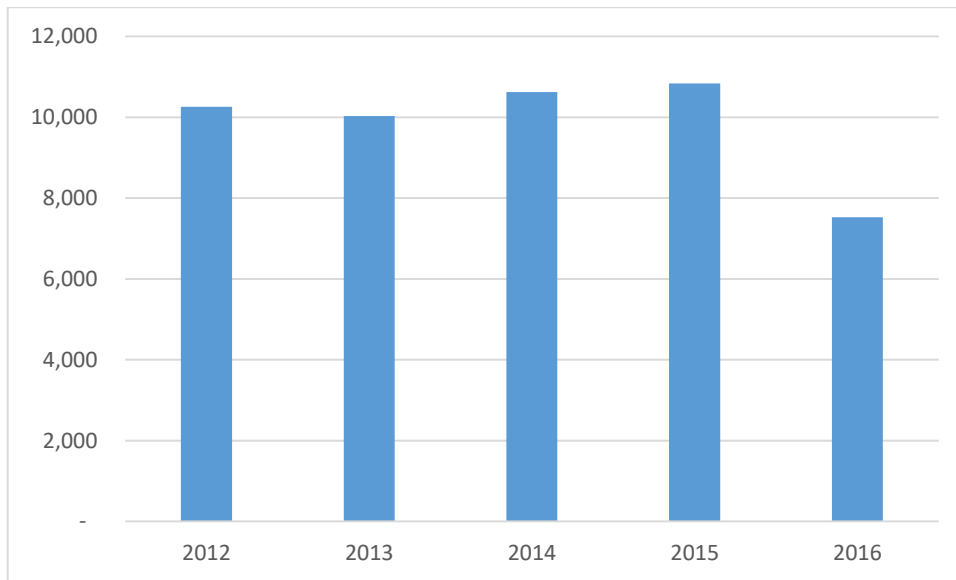
⁹⁵ Brent Employment, Skills and Enterprise Strategy 2015-2020

Figure 56: 16-24 year-olds not in education, employment or training in London and England 2001-2016



Source: GLA Annual Education Report 2017

Figure 57: 16-18 year-olds not in education, employment or training in Brent 2012-2016



Source: DfE NCCIS & Connexions (16-18), Labour Force Survey (16-24), Annual Population Survey (16-24 NUTS3); <https://www.gov.uk/government/collections/statistics-neet>

Care Leavers and Other Vulnerable Groups

As is overwhelmingly the case in the UK, care leavers in Brent experience poorer labour market outcomes than children who have not been in care.

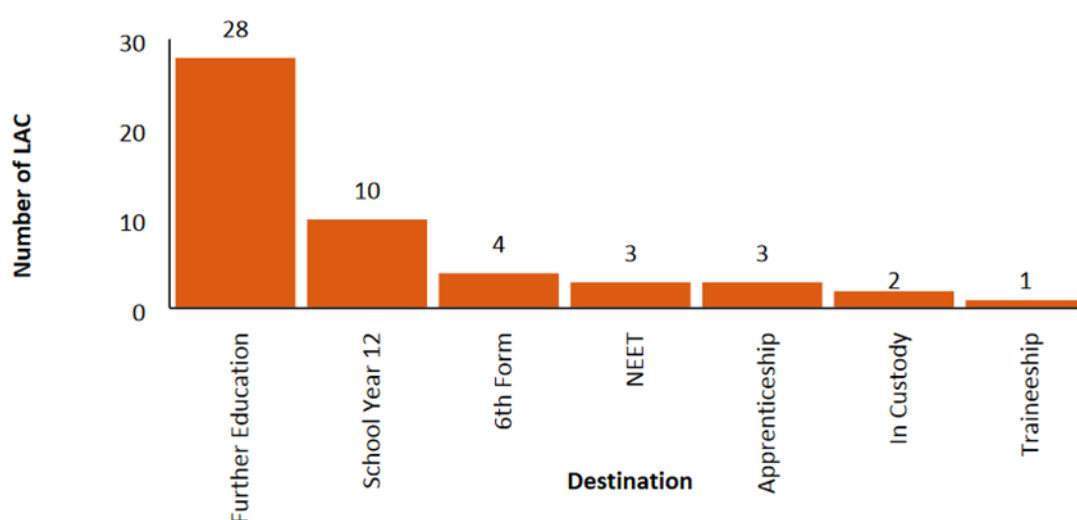
This is in part the result of lower school attainment levels. This is reflected in the relatively poor Key Stage 4 outcomes for non-looked after children, compared to looked after children (LAC), achieving 5 GCSE passes including English and Maths, and the percentage of Year 11s achieving a pass in both English and Maths GCSE only in 2016⁹⁶.

Figure 58: Key Stage 4 Outcomes: Non-looked after children vs. Looked after children (2016)

OUTCOME MEASURE for 2016 SFR KS4 Cohort (25)	Non-looked after children %	Looked after children %	Brent LAC
A* - C grades in both English and Maths	58.8%	17.5%	12% (3)

In spite of the disparities, LAC destinations predominantly included further education, Year 12 and sixth form.

Figure 59: Year 11 Destinations 2015/16



Source: Brent Virtual School for Looked After Children Annual Report 2015/16

Programmes to improve outcomes for Looked after Children and Care leavers include:

- Brent Virtual School for Looked After Children
- West London Alliance Care Leavers project

The Care Leavers employment pilot was commissioned by the West London Alliance, using funding from Brent, Ealing and Hounslow in addition to Job Centre Plus Flexible Support Fund monies. The programme, delivered by Future Paths, provides bespoke employment support to individuals identified through the council's Leaving Care team. In Brent, Future Paths are

⁹⁶ Brent Virtual School for Looked After Children Annual Report 2015/16

co-located in the Civic Centre and work together with the Care Leavers team and a dedicated worker from Job Centre Plus to source customers and move them closer to work whilst addressing wider barriers. In 2018, the number of enrolments on programme is 89 and there have been 30 job or apprenticeship starts. Brent is the highest performing borough in West London.

Black Attainment Gap

As noted above, the attainment levels of Black Caribbean and Somali boys is an issue throughout primary and secondary school. Most of Brent's significant ethnic groups perform well compared to either the same group nationally or all pupils. However, the Somali group is just below national averages for attainment and below for all headline measures for this group. The Black Caribbean group is well below national averages, but this is primarily because of the very low attainment of Black Caribbean boys⁹⁷. The Brent Schools Forum funding allocation, referred to previously, attempts to bridge the educational attainment gap of pupils from Black Caribbean heritage.

The Black male achievement gap extends beyond primary and secondary education and into employment. In 2016, the unemployment rate for Black Caribbean and Black African young men (aged 16 to 24) was 29%. This was almost double the average unemployment rate for all young men, which was 15%⁹⁸.

Figure 60: Number of young black men who need to come off JSA to reduce the YBM claimant rate to the YWM claimant rate

Borough	Young black men (YBM)	YBM on JSA	% of YBM population on JSA	Young white men (YWM)	YWM on JSA	% of YWM population on JSA	To reduce YBM claimant rate to YWM rate this number of YBM need to come off JSA
Brent	4,600	190	4.1	6100	90	1.5	122
Croydon	6,550	240	3.7	9100	215	2.4	85
Ealing	3,050	175	5.7	8400	140	1.7	124
Hackney	4,100	210	5.1	7000	140	2.0	128
Lambeth	5,350	320	6.0	9750	160	1.6	232
Lewisham	5,750	235	4.1	6850	225	3.3	46
Newham	5,550	205	3.7	7050	170	2.4	71
Southwark	6,600	265	4.0	10250	200	2.0	136
London	93,900	3,949	4.2	260000	5025	1.9	2134

Source: BTEG Moving On Up Evaluation Report

⁹⁷ See Annual School Standards and Achievement Report 2016-2017.

⁹⁸ BTEG Black Training and Enterprise Group

Figure 61: Number of young black male JSA claimants in MOU Programme boroughs

Borough	Number of young black men (GLA projection for 2015)	Number of young black male claimants (March 2015)	Possible total number of young black men unemployed (claimant count x 3)
Brent	4,600	190	570
Croydon	6,550	240	720
Ealing	3,050	175	525
Hackney	4,100	210	630
Lambeth	5,350	320	960
Lewisham	5,750	235	705
Newham	5,550	205	615
Southwark	6,600	265	795
London	93,900	3,949	12,102

Source: BTEG Moving On Up Evaluation Report

Efforts to address the achievement gap in terms of school attainment and employment in Brent should be conducted in partnership with other boroughs grappling with the same issues, learning and sharing lessons learned from their initiatives. Considering how the “Improving Outcomes for Young Black Men in Hackney” programme may provide helpful insights to Brent as it considers strategies to increase attainment among this group.

The Moving on Up Initiative (MOU) funded by Trust for London and City Bridge Trust, and in partnership with BTEG, is an initiative designed to help young black men into employment. In 2015, it produced the outcomes in its target areas shown in Figure 62 below.

Figure 62: Outcome Targets by Borough

Provider	Main boroughs for MoU delivery	Number of YBM participants	Target number of YBM job starts	Target number of sustained jobs
Step Ahead	Southwark, Lambeth, Newham, Lewisham	300	150	120
Making the Leap	Brent	100	40	
Action Acton	Brent & Ealing	150	75	50
Elevation Networks	Lambeth	440	176	110
London Youth	Lambeth & Croydon	189	50	
Hackney CVS	Hackney	100	60	30
TOTAL		1279	551	

Source: BTEG Moving On Up Evaluation Report

MOU did an evaluation of services offered across London. They found that the success rates of Hackney CVS and Making the Leap are the highest of the group overall for job outcomes.

Figure 63: Job Outcomes

Projects	# YBM supported	YBM with job outcome data		Job outcomes		
		Number	%	Number	% (of YBM with data)	% (of all YBM)
Action West London	184	156	85%	58	37%	32%
Elevation Networks	151	73	48%	30	41%	20%
Hackney CVS	123	85	69%	71	84%	58%
Making the Leap	82	67	82%	50	75%	61%
Step Ahead	71	35	49%	35	100%	49%
Build-it	72	38	53%	27	71%	38%
Total	683	454	66%	271	60%	40%

Source: BTEG Moving On Up Evaluation Report

This provides some indication that projects focusing on building skills and character through group and community based work have particular potential to effectively support young black men into work.

The biggest impacts the project had on participants were on **attitude, confidence and understanding** of the world of work. Many interviewees said they felt empowered by the targeted approach and felt that those running the group understood them and the specific issues they were facing.

Although **lower aspiration** is often identified as a key barrier to young people gaining employment, the MOU survey data showed that these young men had very high aspirations to begin with, with little room for improvement. Baseline survey scores were higher for this outcome than for any other. This indicates that at least for this group of young black men, it is not a lack of aspiration that is preventing them from securing employment.

Social capital scored lowest on baseline survey questions for this group. Social capital in this context is the process of using personal relationships to find work. This was also the only outcome not to see any improvement at follow-up, and to receive almost no references in the participant interviews.

MOU found that often supporting young black men into employment is only focused on the supply side, however, for unemployment to be addressed successfully, the demand-side must also be looked at by, for example, directly engaging with employers.⁹⁹ Overall, the MOU project found there were three main themes that worked well: caring and persistent staff; a targeted approach and direct contact with employers.

Programmes to improve outcomes for vulnerable and disadvantaged groups

Brent is currently experimenting with a number of initiatives to support vulnerable and disadvantaged groups to come into education and employment. Outcome Based Reviews (OBR) have resulted in a targeted programme of wraparound services to improve outcomes

⁹⁹ Moving On Up Evaluation

for residents in deprived areas. These services will focus on key areas of need, including mental health, women in employment, and economic inactivity in the borough¹⁰⁰.

Priority neighbourhoods identified in the study included:

- Chalkhill
- Church End
- Harlesden
- South Kilburn
- Stonebridge
- St Raphael's

These areas represent pockets of deprivation within the borough. The projects mentioned below are designed to address the needs of populations in the areas mentioned above which include an above average number of JSA and ESA and residents with no qualifications. The Outcome Based Review process resulted in an inventory of services available around meeting employment and training needs for residents with a variety of needs¹⁰¹. A few examples are highlighted below:

The Living Room

The Living Room is an employment support project based in St Raphael's estate - an area of Brent with particularly high unemployment and economic inactivity rates. 46% of claimants on the estate receive either Employment Support Allowance or Incapacity Benefits, indicating a high rate of health issues and disability. Anecdotal evidence from front line staff suggest a prevalence of mental health issues.

The first stages of the independent evaluation show that job outcomes are consistently above target. Case studies and qualitative data gathering show that the place-based model, which requires significant partnership working to 'hide the wiring' so that interventions work around a person, has been successful in moving people into work or closer to employment via basic skills provision.

The pilot has successfully engaged with a wide range of residents by adopting a pro-active and multi-pronged approach to outreach and engagement, including:

- 'Open-door' approach
- Referrals and signposting from support services
- Mandating and signposting from Job Centre Plus
- Drop-in and community events
- Street stalls and door-knocking
- Mixed media campaigns including flyers, posters and social media

Service users engaged with the pilot as they felt that the support offer marketed could help them to work towards a range of aims and aspirations by looking for employment or a new job, meeting their claimant commitment, obtaining training or work experience and accessing advice and support across a range of areas.

¹⁰⁰ Outcome Based Review Board 9th March 2016

¹⁰¹ Contact Fiona Kivett for more information.

At the Living Room, the assessment is conducted by the engagement and employment officers, whom then act as the residents' core adviser. Provision was also orientated towards offering advice and support around non-employment related issues, such as housing, debt, welfare and health, to provide a more holistic support offer to service users¹⁰².

In 2018, the team has been able to support 118 clients into work. Although it is believed to be closer to 150 but full evidence of employment has not been captured from all clients. The relationship with advisers emerged as key to facilitating many of the outcomes. In particular, the consistency of support as a result of having the same adviser and having regular meetings meant that advisers were able to recognise the specific needs of individual service users¹⁰³.

Although the employment outcomes show the positive result achieved, the Interim Evaluation Report (IER) also cited a lack of tailored support for some clients. Some residents with higher skillset and good employment history discontinued their engagement due to lack of relevant support.

Brent Start

The service provides its learning under contract to the Skills Funding Agency (SFA). Brent Start focuses on providing learning and training programmes to the following targeted resident-groups, reflected in curriculum programme areas:

- Unemployed residents, especially long-term ones, with a curriculum helps them improve their job chances.
- Employed residents in low-paid and/or temporary employment.
- Low skilled residents and employees, with a curriculum that helps them to build basic skills and qualifications.
- Economically active learners with low to moderate learning difficulties with a discreet curriculum which can support them into jobs.

The student body is predominantly female at 84%, an increase of 5% since 2015/16. In Skills for Life, the breadth of programmes caters particularly well for learners with very low levels of English, with 24% of all ESOL courses offered at pre-entry. Achievement rates have improved by 4.5% in the past 3 years and are now above national and provider group averages.

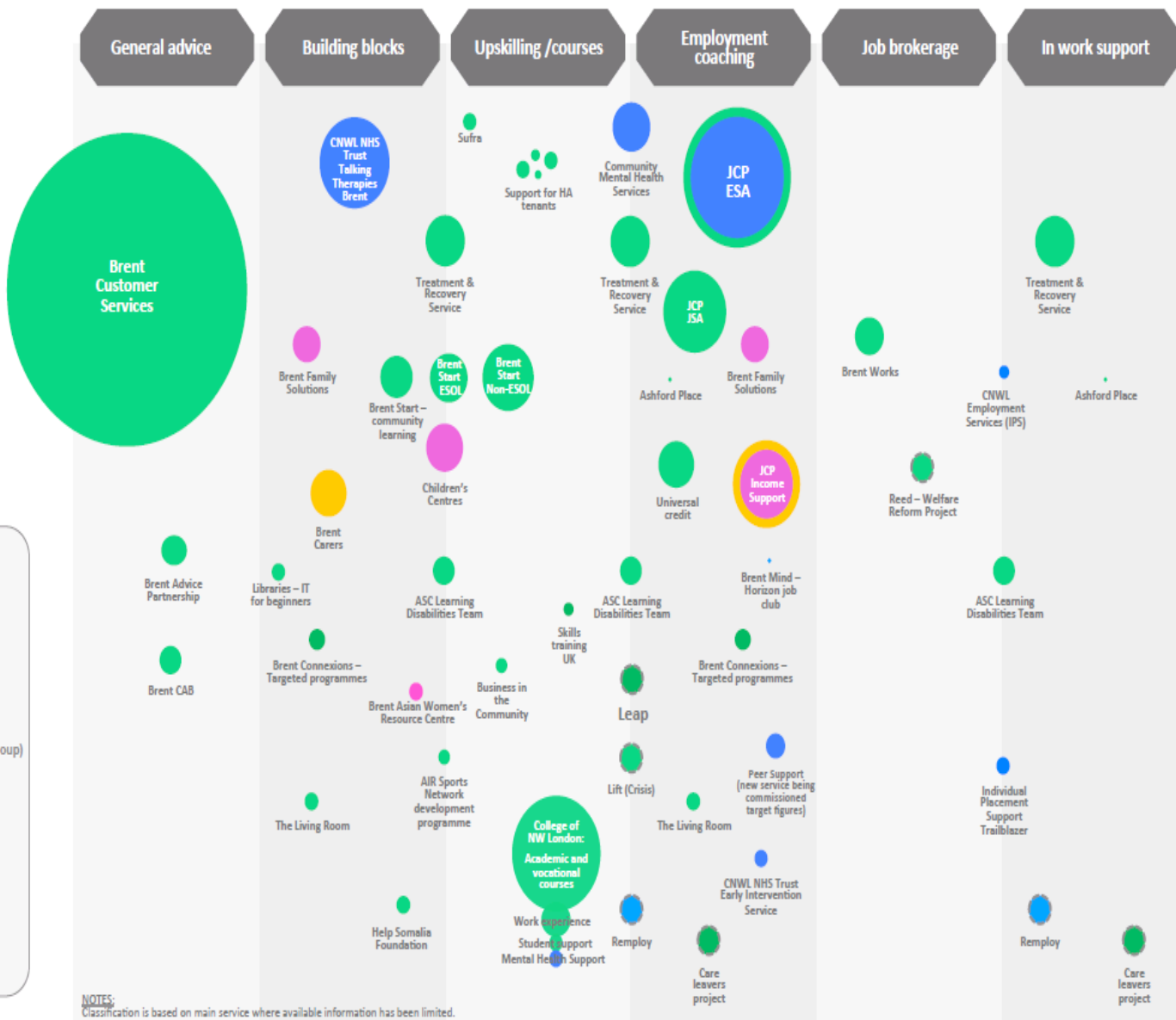
When asked to identify ways in which they had gained in confidence by the end of their course, 58% of Skills for Life learners said they had gained in confidence in their jobs and 73% said they had gained in confidence in looking for work.

A targeted community learning approach in priority neighbourhoods is a strategic aim for Brent Start and is successful at reaching different groups of learners with barriers to learning and personal skills development, delivering programmes in partnership with community stakeholders for those furthest away from the labour market and community engagement.

¹⁰² Working People, Working Places Evaluation: Interim Report

¹⁰³ Working People, Working Places Evaluation: Interim Report

What services are currently available in Brent?



NOTES:
 Classification is based on main service where available information has been limited.
 Some services will deliver support in more than one category

Women

Profile

In Brent, the employment rate for women is **64.2%**, below the average for London of 65.5%

Hourly earnings of full-time workers are **lower for women** than for men

32.2% of women aged between 16 and 64 are **economically inactive** (compared to 16% of men) – above the London average of 29.8%

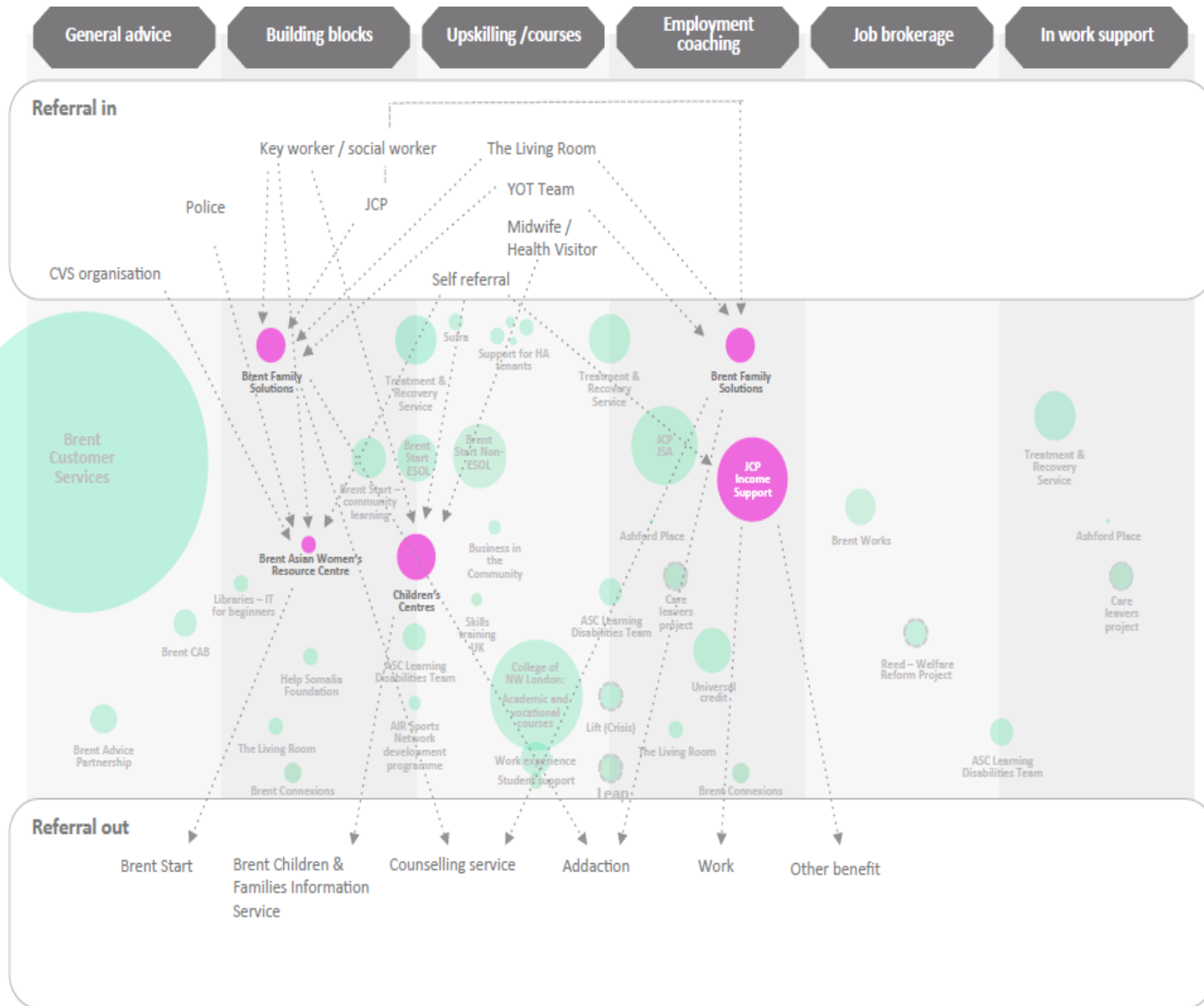
Of 34,900 economically inactive women, 19,200 are aged between **25 and 49**

- 87.5% (30,600) do not want a job
- **looking after family/home** is the most prominent reason for economic inactivity – 93% of this group are women

Unemployment rates are higher for young women, 25.0% of women aged 16-24 are **unemployed**; compared to 3.0% for women aged 25-49

2,100 of the 2,140 claimants for **income support** as a lone parent are women

Source: APS



Key

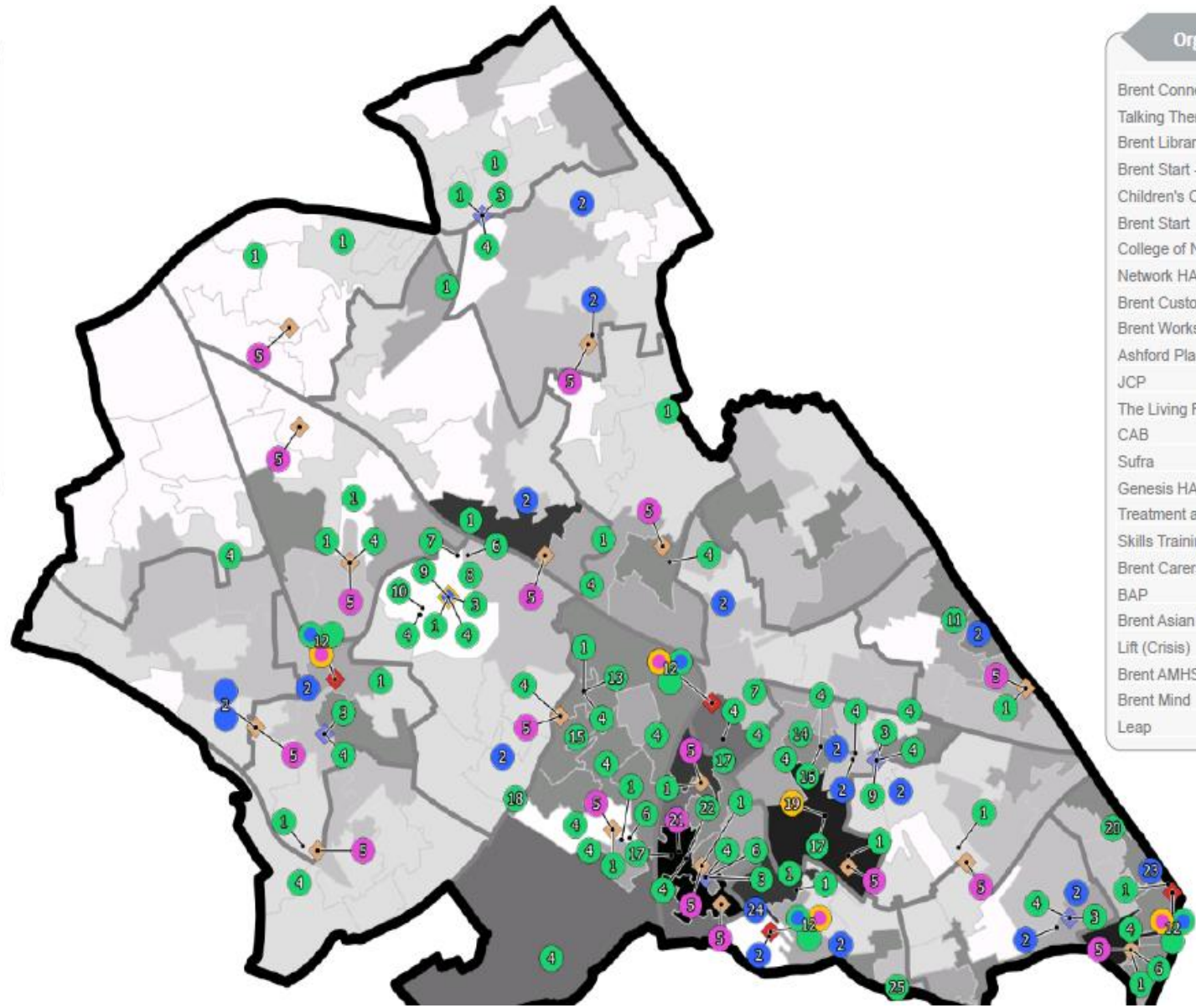
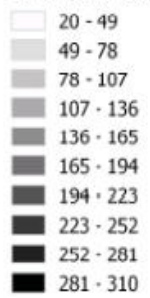
Client group

- Women
- Carers
- Mental health
- Other (wider than target group)

Locations

- ◆ Civic Centre
- ◆ Job Centres
- ◆ Libraries
- ◆ Children's Centres

JSA and ESA claimants by LSOA



Organisation number

Brent Connexions	1
Talking Therapies	2
Brent Libraries	3
Brent Start - Community Learning	4
Children's Centres	5
Brent Start	6
College of NW London	7
Network HA	8
Brent Customer Services	9
Brent Works	10
Ashford Place	11
JCP	12
The Living Room	13
CAB	14
Sufra	15
Genesis HA	16
Treatment and Recovery Service	17
Skills Training UK	18
Brent Carers	19
BAP	20
Brent Asian Women Centre	21
Lift (Crisis)	22
Brent AMHS	23
Brent Mind	24
Leap	25

Mental health

Profile

More than 1 person in 10 will be suffering from a common mental disorder at any one time.

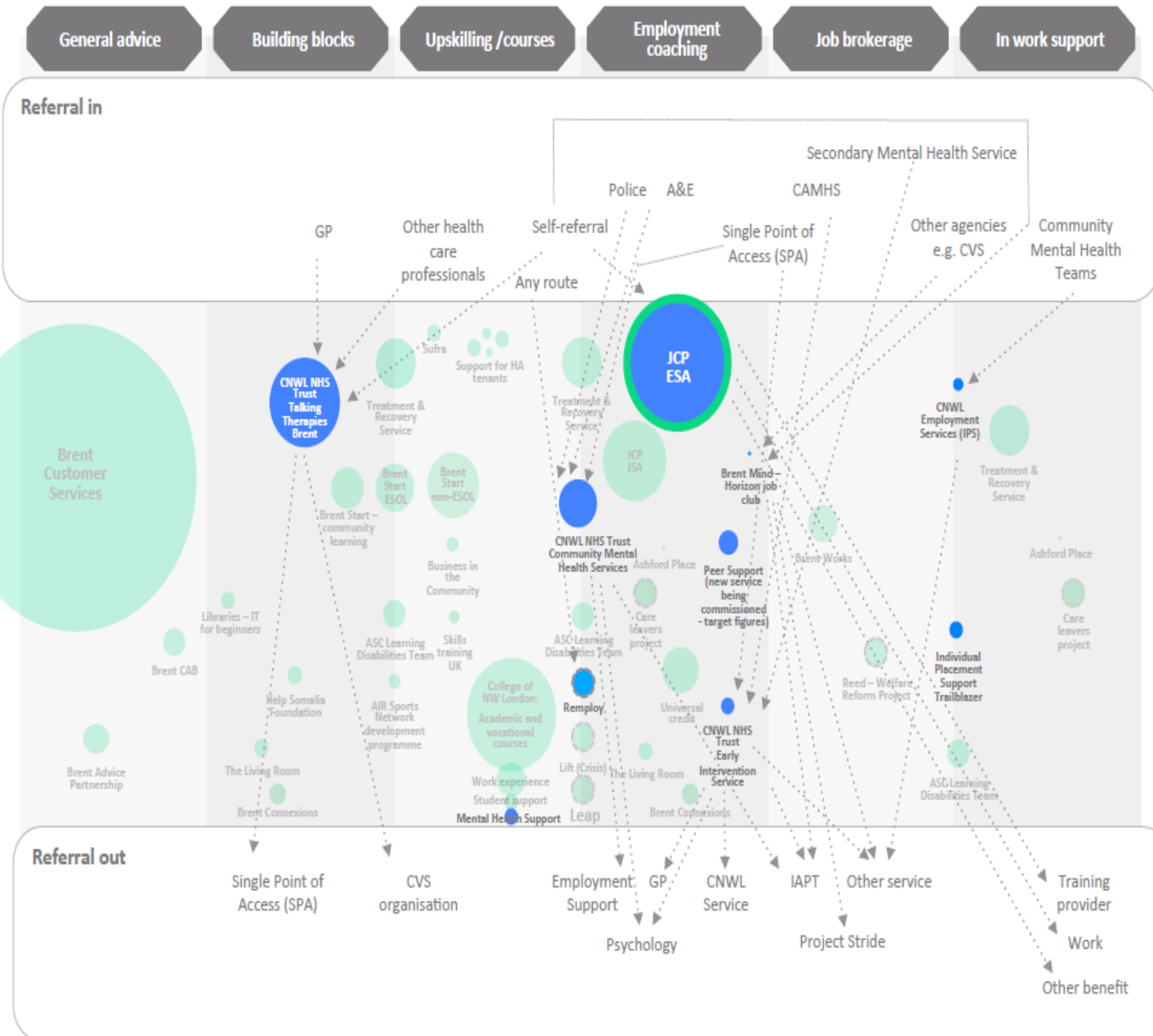
Of the working age population in Brent, 12,500 (5.6%) say they suffer from depression, learning problems, mental problems and nervous disorders.

Of these 12,500, 32.5% are currently in some form of **employment** (lower than London - 34.9%).

The **unemployment rate** in Brent for these individuals is **8.2%** (higher than the overall working age population).

Unemployed people with mental health needs account for 8.4% of the total unemployment figure in Brent.

Work related stress is the largest cause of work days lost to illness (43%)



Policy and the Future of Post 16-education Opportunities:

There are a number of current policy developments which may be expected to influence the future of post-16 education opportunities for Brent residents.

T Levels

In July 2017, the Government confirmed plans for 15 routes in a Post-16 Skills Plan. The Plan promises to transform vocational education, providing a technical equivalent to the academic focused A-levels.

Four routes are expected to be delivered through apprenticeships only. The roll out of the remaining 11 T level routes will be phased, with a small number of providers delivering some pathways within 3 of the routes in September 2020, and the remaining routes launched in two waves in September 2021 and 2022. The planned timetable for delivery of the 11 classroom-based routes is given in Figure 64 below.¹⁰⁴

Figure 64: T Level Timetable



Source: T-Levels Action Plan (2017)

¹⁰⁴ T-Levels Action Plan (Oct 2017)

Adult Education Budget Devolution

In the Spring Budget 2017 the Government confirmed that it would devolve the Adult Education Budget (AEB) to London from academic year 2019/20.

The prospect of a devolved adult education budget for London offers the chance to reshape skills provision so that it better serves the needs of employers and residents in London. The GLA is expected to commission the majority of adult education through the sub-regions who will have the ability to direct a proportion of the AEB, aligning it with other devolved and local funds. Discussions between the GLA and London boroughs via London Councils on devolution have been agreed by the London Councils Leaders' Committee. These discussions have focused on how sub-regional clusters of boroughs will be able to help influence AEB in the capital following devolution to better meet local needs. It has been agreed that collaboration arrangements will be regularly reviewed as more information on the practical operation of the devolved AEB emerges from the Department for Education¹⁰⁵.

Elsewhere, the West London Economic Prosperity Board is working collaboratively with the West London boroughs to design a West London Skills Strategy. As well as the extension of student loans to those undertaking adult further education, introduced in the last parliament, will see individuals increasingly taking on the responsibility for funding their own training¹⁰⁶.

The Apprenticeship Levy

The introduction of the Apprenticeship Levy – a hypothecated tax on larger employers with payrolls above £3 million to fund apprenticeships – is leading to many employers in London looking either to offer apprenticeships for the first time, or to increase the number they already provide. There has been resistance from businesses regarding the Apprenticeship Levy partly due to a lack of understanding of their responsibilities. As a way of mitigating this the Mayor argued for the Apprenticeship Levy to be devolved to the London boroughs¹⁰⁷. Government has now confirmed such devolution from academic year 2019/20. The Kings Commission on London has suggested that an Apprenticeship Levy Council, comprising members from the boroughs, London businesses, colleges and City Hall, should be created as a body to monitor and assist companies in delivering their plans about how to spend their levy¹⁰⁸.

The amount of apprenticeships provided in London is lower than the UK average. There is evidence that there is a relative lack of employer engagement and investment in skills training across the UK in general, but it is particularly high in London. For example, a higher proportion of employers in London (36%) did not fund or arrange any training for staff in the 12 months to mid-2013 (compared to 34% in the rest of England). In 2012/13, London employers invested an estimated £7.1 billion in workforce training, down 30% from £10.1 billion in 2010/11 (compared to a 5% fall in employer investment in training for the UK as a whole – from £45.3 billion to £42.9 billion)¹⁰⁹. The Apprenticeship Levy may be a good vehicle to engage employers in the skills and education agenda.

¹⁰⁵ Devolution of the Adult Education Budget to the Mayor London Assembly

¹⁰⁶ Institutes of technology prospectus 2017

¹⁰⁷ Skills for Londoners: A Draft Skills and Adult education strategy for London

¹⁰⁸ London 2030 and beyond

¹⁰⁹ Trends in the demand for labour and skills in London and the West Sub-region 2016

Institutes of Technology

The Government is also planning to introduce Institutes of Technology (IoTs). They will be institutions offering higher level technical education and training to young people and to those already in employment. IoTs will be created through innovative collaborations between employers and FE and HE providers; harnessing the teaching expertise of HE and FE, research expertise of HE, and industry knowledge and expertise from employers. DfE invited formal applications for funding from a £170 million capital fund to establish IoTs across England in 2017, with twelve IoTs announced in April 2019.

Technology in the classroom

Use of technology in the workplace is becoming common place, and there is significant growth in the use of technology not just in formal education, but also in adult skills (professional and personal). It is unlikely that technology is going to become the main means of providing education, but it is increasingly becoming a complimentary learning tool.

There is not a huge amount of information about how technology is used across education in Brent. There is some indication that ICT is not used extensively in Brent Start, as there is a limited use of online learning to support learning outside the classroom. Although students have access to computers at the various Brent Start sites, learners feel that on some sites the access to computers outside lessons is limited¹¹⁰. Learners in Brent, particularly those on non-vocational courses, do not use the online and paper-based resources available to them well enough outside of lessons to improve their rate of progress. A renewed focus on the use of online learning to enable learners to continue and extend their learning outside lessons requires further development in most areas of Adult Skills Budget and Community Learning.

Technology could be especially useful for ESOL learners as there are a number of learning apps available. In one example, artificial intelligence (AI) chatbots – computer programmes that can simulate conversations with a learner – helped learners to practice their foreign languages. Learners with limited vocabularies are challenged to ask interesting and different questions to the chatbot, so that its responses create a conversation¹¹¹.

Technology can also be used in early years' education. There is an emerging body of largely small-scale work that shows that technology can have a positive impact on early literacy outcomes. Technology can play an important role in supporting early communication, language and literacy by offering new opportunities, such as interactive and intuitive story telling e-books and apps, as well as other services, such as online video calling¹¹².

There are many avenues that could be explored using digital technologies to improve outcomes and increase digital literacy within education.

Brexit

Employment

London faces significant skills challenges in the coming years, which will be impacted by the potential effects of the UK leaving the European Union. The impact of Brexit in London will be bigger than the impact in the UK as a whole as European citizens make up a larger proportion

¹¹⁰ Brent Start Self-Assessment Report 2017

¹¹¹Decoding Learning: The Proof, Promise and Potential of Digital Education 2012

¹¹²National Literacy Trust 2016

of the workforce in London. EU nationals make up 15% of the financial sector and 10% of London's NHS.¹¹³ Brent, which has the third largest EU population amongst London boroughs, and which constitutes 20% of Brent's working age population, would expect to be particularly affected by any negative migration restrictions or departure of EU nationals. Workers are concentrated in important sectors and deliver services vital to the maintenance of the city. This is particularly prevalent in London's construction sector which has an ageing workforce and is heavily reliant on migrant labour. EU nationals make up 30% of the workforce, while just half are UK-born. Of the UK-born workers in the capital, 38,500 (12%) are set to retire in the next 5-10 years. Yet it is estimated that 60,000 more construction workers are needed in London and the South East to keep up with demand.

European funding

There is also uncertainty regarding the impact of Brexit on research funding as well as the impact it will have on European teaching and research staff. In August 2016, the Government announced that it would guarantee funding for research and innovation projects funded through the EU's Horizon 2020 programme, even when specific projects continue beyond the UK's departure from the EU.

The European Social Fund (ESF), which has been used to fund a variety of skills development for economically inactive young people across the UK, is another significant source of funding¹¹⁴. The Government has indicated that the European Social Fund (ESF) will continue to December 2023, the end of the 2014-20 Structural Funds programming period. There is approximately £130m ESF in London available to commit to the second phase of the 2014-20 programme.

The devolved AEB will potentially be used to match the ESF which is currently not committed¹¹⁵. Without AEB as match funding, London is highly unlikely to be able to draw down on the full ESF allocation which would result in a significant reduction to the skills and employment provision available, particularly the most disadvantaged groups after 2019.

Ways of Working

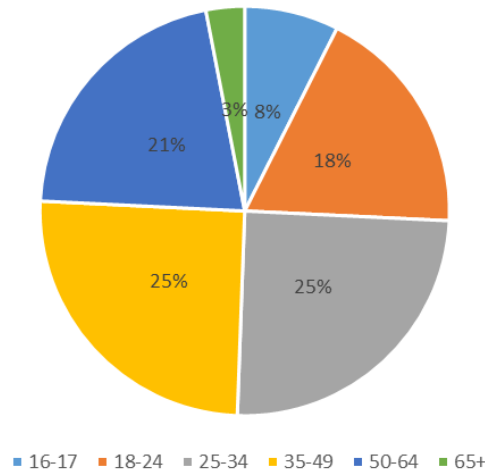
Alongside these changes in employment demand and the sectorial composition of the UK and London economy, there have been and will continue to be changes in the way that people want to work. Current social policies e.g. increased retirement age and increased parental rights are likely to impact the working populations in the future. Currently only 3% of workers are aged above 65.

¹¹³Bridging the Skills Gap: How skills devolution can secure London's future prosperity by APPG For London

¹¹⁴ The ESF in the United Kingdom

¹¹⁵ Devolution of the Adult Education Budget to the Mayor London Assembly

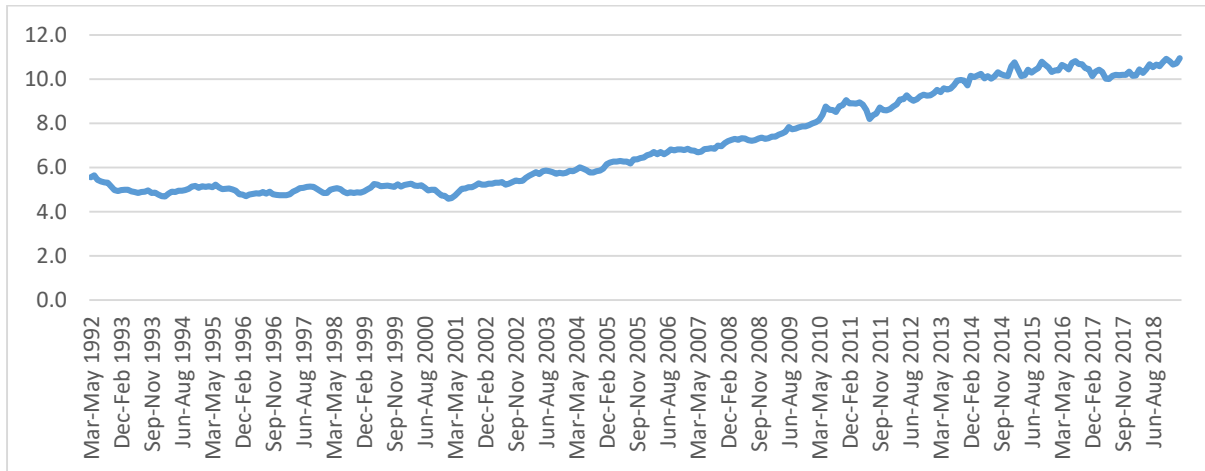
Figure 65: Employment by Age Group 2018



Source: Labour market by age group: People by economic activity and age (not seasonally adjusted) 2019

State pension age has been gradually increasing for women; rising to 65 in November 2018, matching the pension age for men. After this point, State pension age for all individuals will increase to 66 by October 2020 and to 67 by 2028, under the schedule established by the Pensions Act 2014.¹¹⁶ Employment of workers over the age of 50 years has grown significantly over the past decades.

Figure 66: Employment rate for over 65s



Source: Labour market by age group: People by economic activity and age (not seasonally adjusted) 2019

The employment rate for people aged 50-64 years has grown from 55.4% to 72.6% over the past 30 years, an increase of 15%. The proportion of people aged 70-74 years in employment has almost doubled over the past 10 years (from 5.5% to 9.9%), and the overall numbers in employment more than doubled from 124,000 to 258,000 people.

At the same time, labour market insecurity is increasingly prevalent in the form of self-employment, temporary contracts and zero-hours contracts, and is expected to impact more jobs. In 2016, the share of part time work had increased from 2.4 percent to 3.9 percent in the UK. There are currently 3.2 million people who face insecurity in work in the UK and are working on a contract that does not guarantee employment rights. This refers to forms of temporary work, which includes agency work, casual and seasonal work, where workers often

¹¹⁶ Fuller Working Lives Evidence Base 2017

miss out on key employment rights and protections, including family friendly rights, redundancy pay and sick pay. This includes zero-hours contracts, where workers face insecurity about their incomes and hours of work. As well as low paid self-employment, where workers miss out on employment rights and income related protections such as sick pay and maternity pay, but cannot afford a safety net for those periods when they cannot work.

The rise of insecure work is not impacting all groups equally. Evidence shows that 1 in 13 BAME employees are in insecure work and 1 in 8 Black employees are in insecure work, whereas the average is 1 in 17. Black workers are over twice as likely to be in temporary work as the average. They have also experienced the largest increase in the number of people in temporary jobs between 2011 and 2016, with a 58% increase, compared to an overall increase of 11%. Additionally, 42% of Black workers are in all temporary work because they cannot find a permanent job, in comparison to 31% of the total temporary workforce. Women are also more likely to be on zero-hours contracts, at 52% compared to 48% for men, and for Black women workers it increases to around 60%. These labour market disadvantages are mirrored in Brent's population, with women and black communities having some of the lowest economic participation rates.

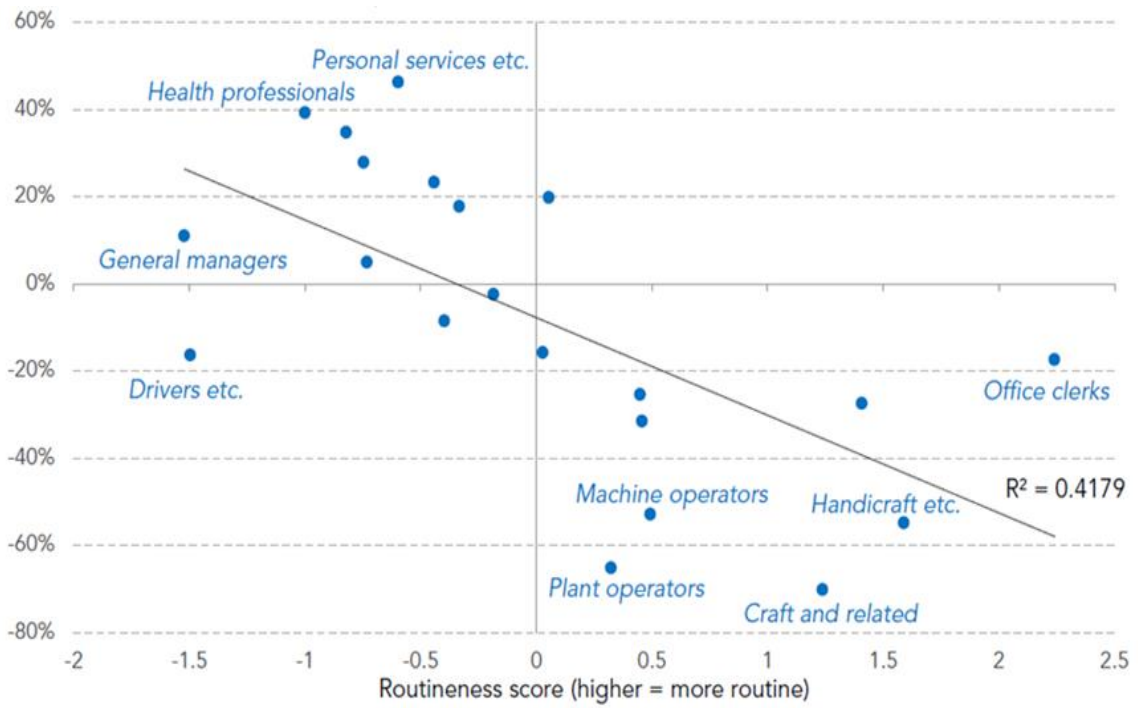
Individuals in these working arrangements have the right to turn down work, but evidence shows that workers often felt that to express views about conditions or make even reasonable requests risked having future work denied to them. Flexibility is, therefore, currently synonymous with insecurity.

Automation

Future education and skills provision needs will also be shaped by the potentially disruptive effects of technological advances such as automation, 3D printing and artificial intelligence. There have been reports that up to 15 million jobs are at medium to high risk of being automated in the coming decade. However, there is also research that the scale of automation has been overstated. Even so, some jobs are likely to be more at risk than others, for example, 60% of retail jobs in the UK are forecast to be lost by 2030 through technological change, while education, health, care, business services and the creative sectors will grow.

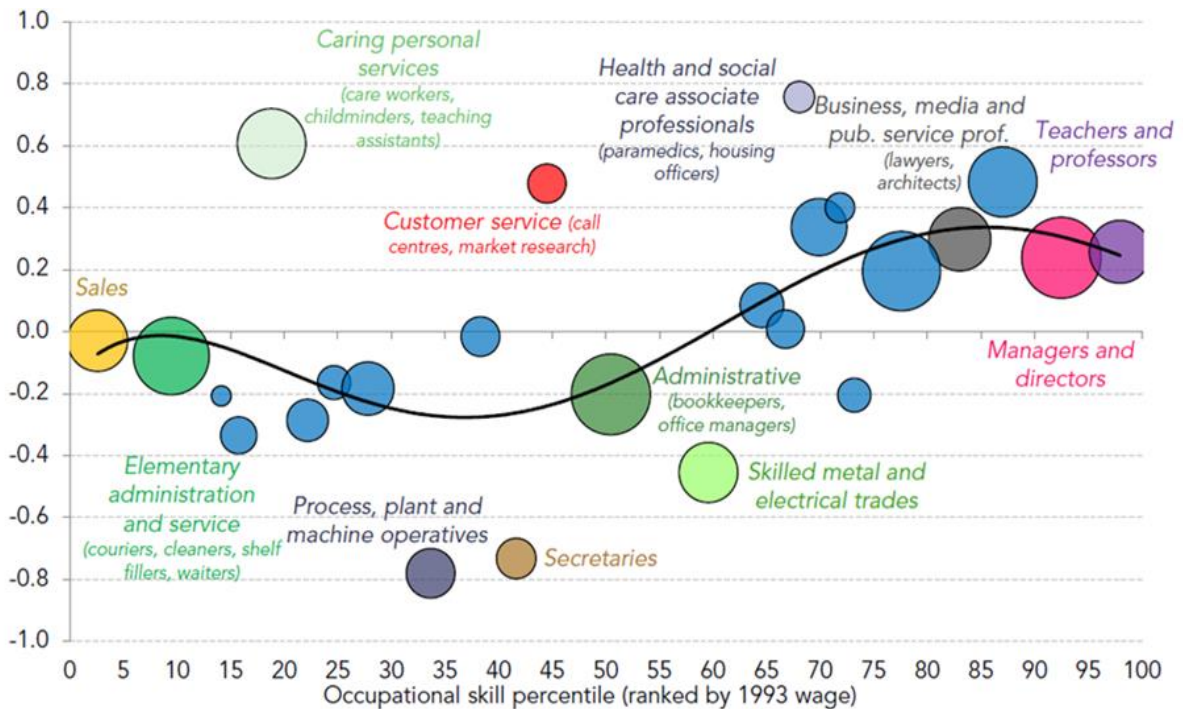
The risk of automation for an occupation has been linked to the 'routineness' and their decline as a share of the UK's jobs. Figure 67 shows how levels of routineness impacted jobs growth between 1993 and 2015.

Figure 67: How levels of routineness impacted jobs growth between 1993 and 2015



Source: Resolution foundation 2016 Robot wars Automation and the labour market

Figure 68: Share of employee hours has changes by occupation between 1993 and 2015



Source: Resolution foundation 2016 Robot wars Automation and the labour market

This shows that the amount of hours available in low skills areas has reduced in general. Considering that the workforce in Brent is quite diverse it is unlikely that automation will not occur at the same pace across all areas.

There are gender and ethnicity related inequalities when it comes to the impact of technology. Partly as a result of high-skill roles not being at as high risk of being automated, these roles in most sectors are dominated by white men. Also, individuals lower down the skills distribution often have skills and qualifications suited to their current work, but less adaptable to other kinds, and will therefore find it harder to find new work.

Trends

The trends outlined below present both challenges and opportunities for the future of Education and Skills provision in Brent. Challenges include anticipated increased demand for quality, flexible adult learning support, and the needs of groups currently disadvantaged in education and the labour market.

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 the same rate as the white population at 71.9%¹¹⁷. 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. The employment rate for people aged 50 to 64 has grown from 55.4% to 70% over the past 30 years, an increase of around 15%. Self-employment in Brent is also higher than average at 17.4% in comparison to 13.3% in London.¹¹⁸

Brent has a number of groups who are currently disadvantaged within the current jobs market. This alongside the rise of automation, the growth of the knowledge economy and changing working patterns will have a profound impact on the education and skills requirements.

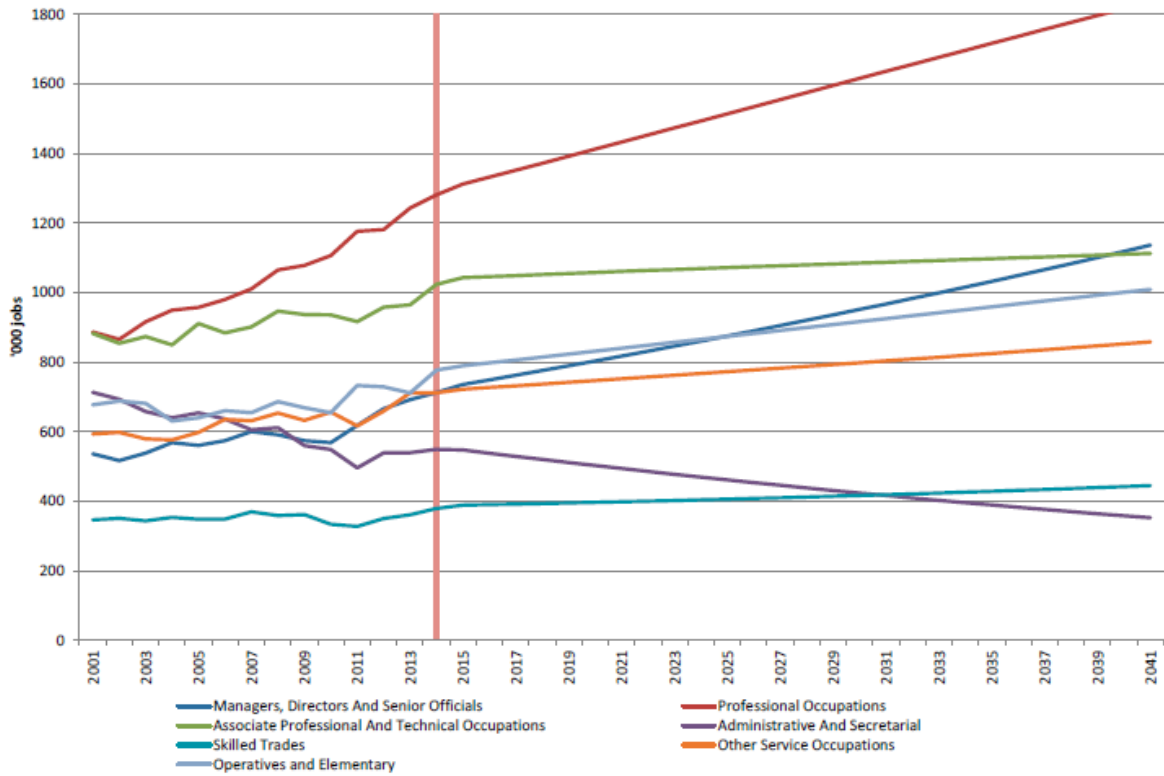
1. Changes in employment demand with most new jobs in London expected to take place in knowledge sectors, and professional/managerial in nature.

According to GLA projections, jobs in the professional, real estate, scientific and technical sector are expected to account for over a third of the total increase expected in London by 2041. Strong employment growth is also expected in the administrative and support service, accommodation and food service, information and communication sectors, education and health sectors – collectively accounting for nearly three fifths of the expected total London increase in 2041.

¹¹⁷ ONS (2017) Annual Population Survey 2017

¹¹⁸ Nomis 2018 Local Authority Profile for Brent

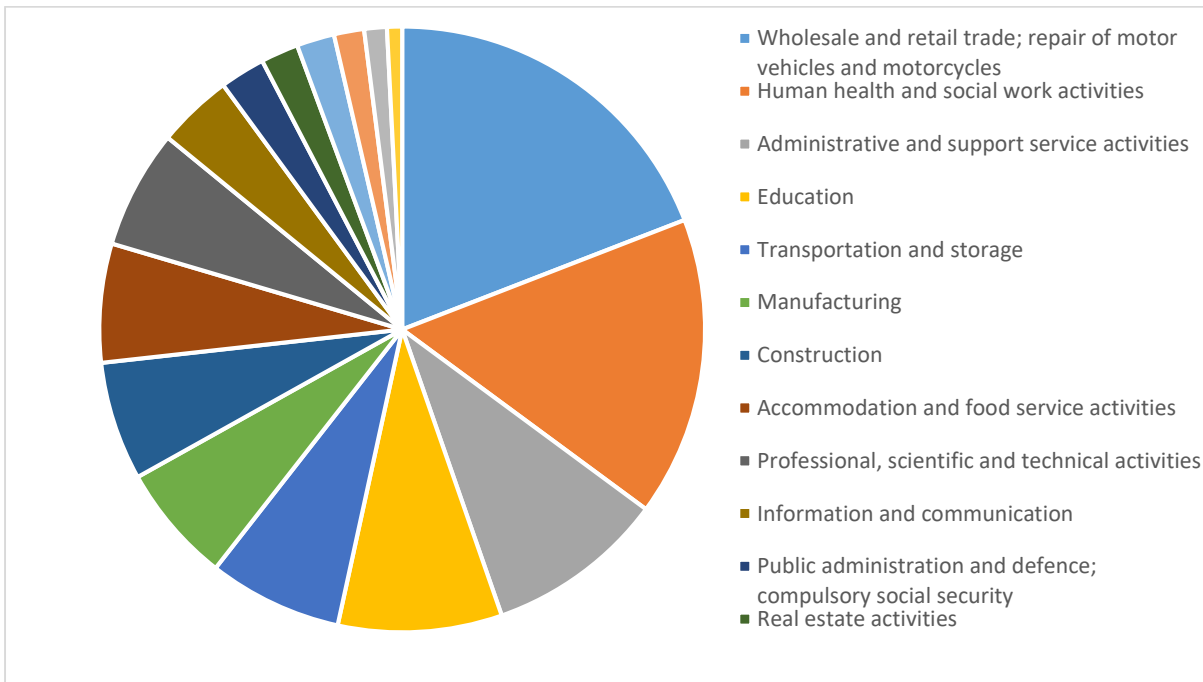
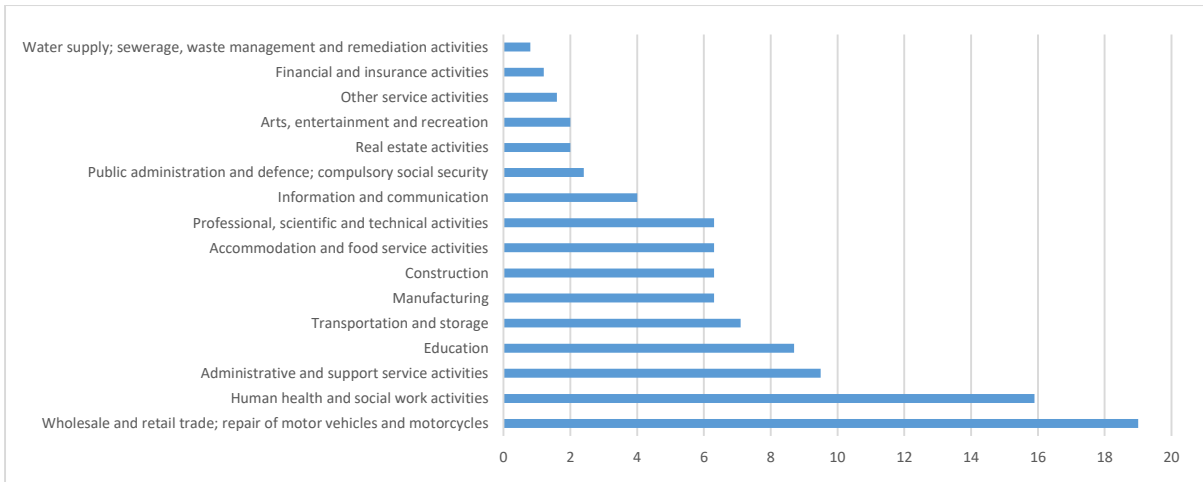
Figure 69: Changes in Occupation Demand in London (2001 to 2041)



Source: ONS Annual Population Survey, ONS Labour Force Survey, ONS Workforce Jobs series and GLA Economics calculations

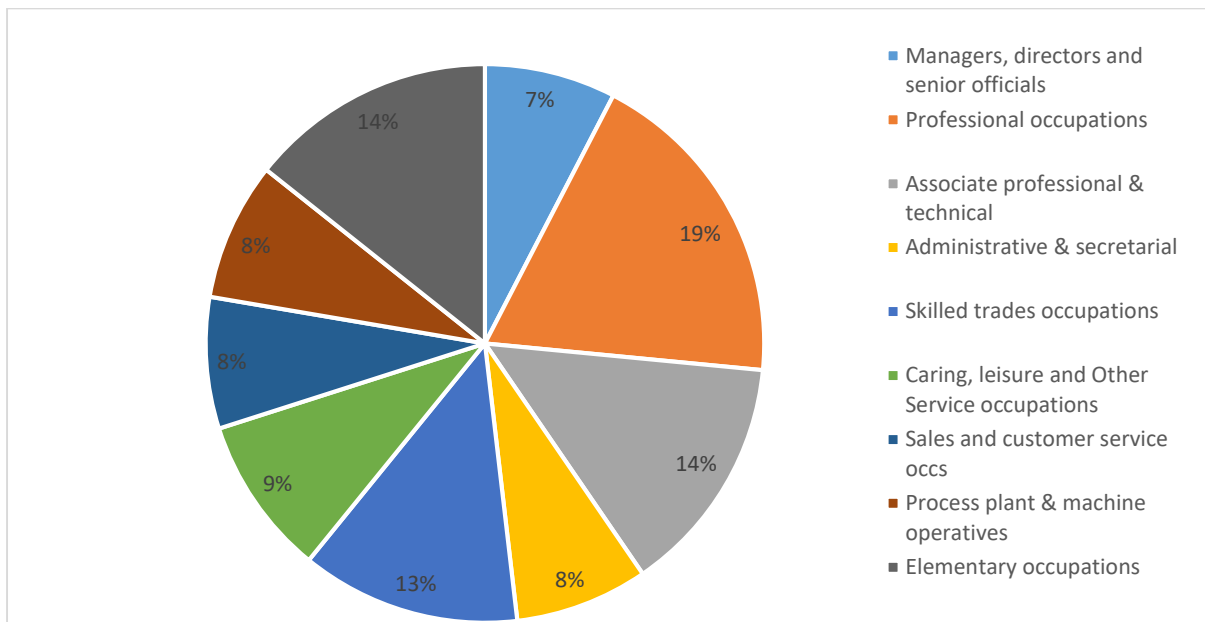
Figures 70 and 71 below show that Brent employs relatively larger numbers in sectors which are projected to decline across London including; Manufacturing, Transportation and Storage, and Wholesale. Employment in primary and utilities and public administration and defence sectors are also expected to continue to decline over the period to 2041.

Figure 70: Brent Working Population, Employment by Industry 2017



Source: Nomis Labour Market Profile – Brent 2018

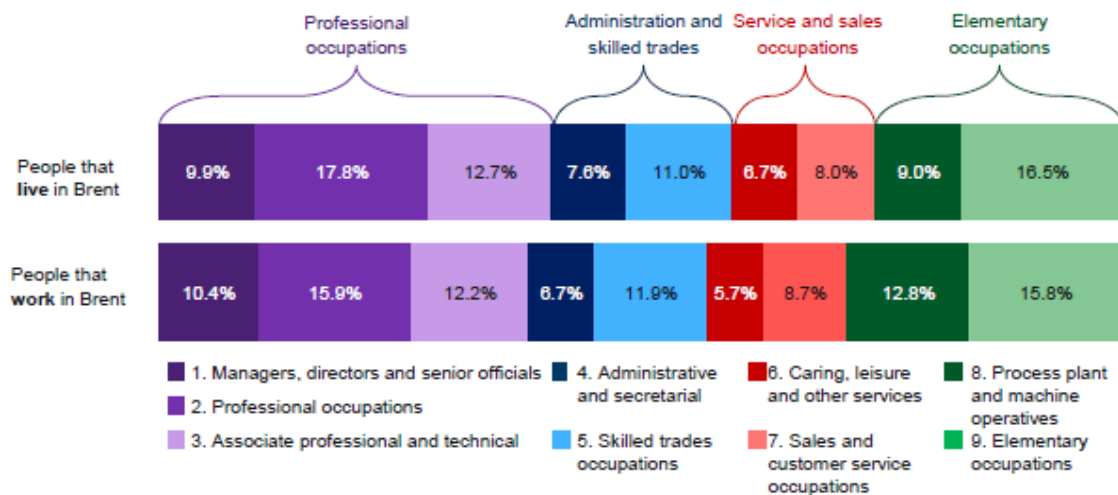
Figure 71: Employment by occupation in Brent 2018



Source: Nomis Labour Market Profile – Brent 2018

Data for 2014/15 shows the different breakdowns by industry and occupation for people living and people working in Brent.

Figure 72: Employment by occupation in Brent, April 2014 to May 2015

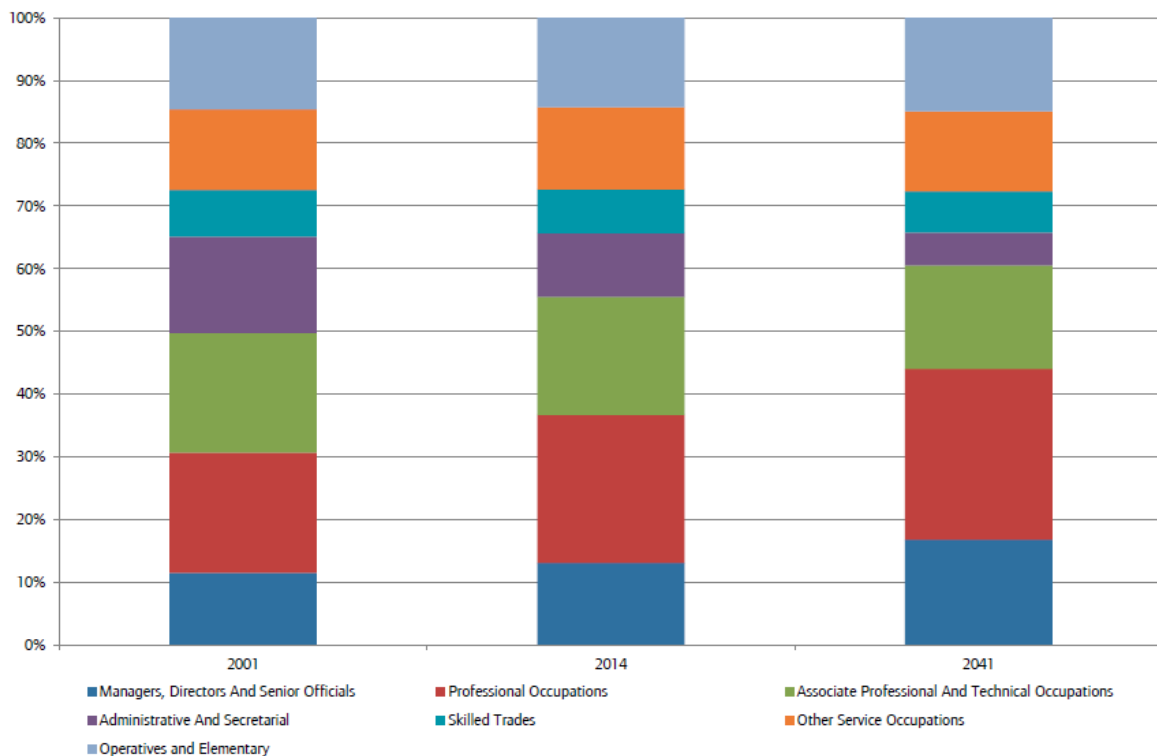


Source: Economy and Employment- Brent JSNA 2015

There is a good mix of professions and occupations in the borough for those that live and work here, which is positive as this diversity means that the jobs market will have some resilience against industry specific changes and wider emerging trends.

Figure 73 below illustrates the projected changes in occupation demand and change in occupational shares until 2041. Effective Education and Skills provision is required to ensure educational attainment for pupils as well as for adult learners who need up-skilling or reskilling for predicted changes in industries.

Figure 73: Changes in Occupation Shares in London (2001 to 2041)



Source: ONS Annual Population Survey, ONS Labour Force Survey, ONS Workforce Jobs series and GLA Economics calculations

In London, projected shifts in employment and occupations are going to increase by 49,000 jobs per annum, to reach 6.9 million in 2041¹¹⁹. This will significantly increase the demand for ordinary and higher degree level qualifications over the period to 2041. Jobs requiring ordinary or higher degree level qualifications are projected to increase by 985,000. As a result, the proportion of jobs in London requiring either an ordinary or higher degree is projected to reach 54% by 2041, with the proportion of jobs with no qualifications becoming less than 3%.

Professional occupations, managers and administrators are projected to account for around 45% of all jobs in London in 2041. The proportion of jobs in administrative and secretarial occupations, in contrast, is projected to decrease substantially from 10.5% to 3.3% of total London jobs from 2014 to 2036. This will present challenges to the employment prospects of London's lower skilled labour force as a whole, and particularly in Brent, where administrative and secretarial occupations are projected to decrease to 7.6%. This decrease in jobs in administrative and secretarial roles occurs at the same time as there is projected to be a large increase in elementary occupations in accommodation and food, and administrative and support services which has seen recent growth in temporary roles. While growth in professional and managerial roles reflects the growth of high skill, high pay jobs, growth in these occupations represents growth of low skill, low pay and potentially more precarious jobs. As the service sector grows in the coming decades it will produce high skilled, high wage jobs as well as low skilled, low paying jobs.

The shift in evolving employer demand is already evident in London's economy today. As noted in the GLA Annual School Report 2017, London's economy is increasingly demanding highly developed skills in Science, Technology, Engineering and Mathematics (STEM)

¹¹⁹ GLA Economics London labour market projections 2017

subjects. Yet, today relatively few young people in London are leaving school with A-levels in this area, particularly young women and those from BAME backgrounds.

There will be 142,000 new jobs in science, research, engineering and technology from now to 2023¹²⁰. The digital sector, which requires strong skills in STEM subjects is growing; however, there is a significant digital skills gap that is preventing young people from accessing these opportunities.

A recent Tech London Advocates survey found that 46% of respondents felt a lack of skilled workers was the biggest constraint to growth, and that a greater commitment to digital skills training was the single most important issue the government needs to address to ensure the continued growth of the tech sector.

Implications:

- Workers in declining sectors will need upskilling in order to obtain work in other fields.
- Education and skills provision will need to prepare Brent residents access the pathways to qualifications and upskilling which are relevant to a future economy dominated by high skilled sectors, particularly related to STEM.
- In an economy where skills demands are ever-rising, schools' performance will be very important to the long term performance of the economy in Brent and West London.
- The unskilled population will suffer constant pressure on wage rates and a negative shift in their employment and earnings prospects. Groups which disproportionately have low educational attainment levels and labour market outcomes (e.g. care leavers, lone parents, certain BAME and vulnerable groups) will be further marginalized and disadvantaged in the increasingly polarized labour market, with long term economic implications for Brent and its residents without effective education and skills provision.
- Lower qualified residents are concentrated in specific areas of the borough. As lower skilled workers are likely to struggle in the future economy, these areas will likely perform worse over time without targeted intervention.

2. The Rise of Self Employment & the Gig Economy

In the UK 10.6% (4,840,200) of the population is self-employed in comparison to 17.4% (40,100) in Brent. Since 2008, the number of total jobs has increased by just over 2 million, of which nearly 1 million (44%) are accounted for by self-employment¹²¹.

Changes in the structure of the economy or the population are also likely to have an impact on the total number of self-employed. The gig economy is sometimes conflated with the general trend towards self-employment or 'independent work'. However, the 'gig economy', refers to the trend of using online platforms to find small jobs, sometimes completed immediately after request¹²². Three trends which will impact the amount of people who are self-employed or working in the gig economy are; changes in employment, changing demographics and the impact of new technology.

¹²⁰ Jobs of the Future 2017

¹²¹ RSA 2017 Good Gigs A fairer future for the UK's gig economy

¹²² CIPD 2018 Megatrends More Selfies? A Picture Of Self-Employment In The UK

Changes in employment

Individuals' choices are constrained to an extent by prevailing business models and labour market structures. Therefore, freelancing is common in certain occupations, for example, broadcasting and therapy¹²³. As stated above, self-employment is becoming a bigger part of the UK economy, as evidenced by the flexible labour market being key to the UK reaching record employment. Many have entered the gig economy because of fewer opportunities in traditional employment; full-time employment accounts for a relatively smaller share (31%) of the growth in employment¹²⁴.

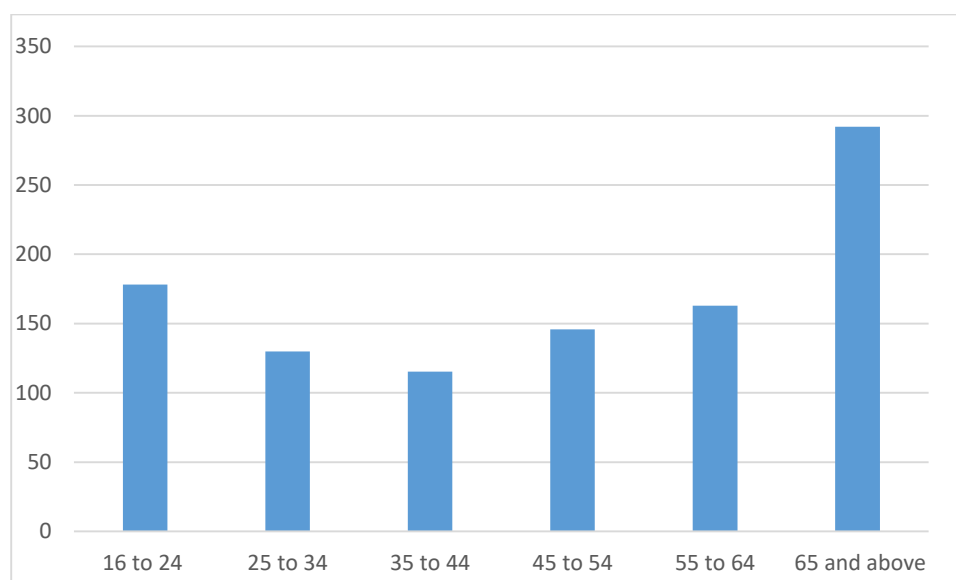
The industries that are projected to grow over the next 20 years are more likely to have higher levels of self-employment i.e. the construction and creative industries. Workers in the skilled trades who are self-employed have long been sourcing jobs online through platforms but increased technology is fuelling this trend¹²⁵.

It is unlikely that UK government policy will be very strict on the gig economy, as it does not want to diminish the economic opportunities created by it. So far it has not followed precedents set in other European countries where platforms are deterred or banned altogether. A policy framework that encourages self-employment will help enable further employment through these structures in the future.

Changes in demographics

Increased self-employment reflects a shift in mind-set. Workers now crave flexibility, more control and a greater variety of work. The demographic of self-employed people is currently older, more educated and male.

Figure 74: Increase of Self Employment by Age



Source: ONS (2018) *Trends in self-employment in the UK*

While most people in the gig economy are between 31 and 54, the appeal of gig work is growing among people aged between 16 and 30, as shown in the chart above. With this in

¹²³ Ibid

¹²⁴ RSA 2017 Good Gigs A fairer future for the UK's gig economy

¹²⁵ Ibid

mind the number of young people in the gig economy could grow to around 3.7 million. Young people work fewer hours than 31-54 year olds in the gig economy, so it is likely that they are using gig work as a bridge to other forms of work, for example, while job hunting following graduation¹²⁶.

Gig workers tend to be highly skilled, with around 44% having university degrees. The population is going to become increasingly educated with a mismatch of skills (discussed below), and therefore the need for work that fits around career lulls is likely to increase.

There is also a rise in demand for increased flexibility for workers in general. 87% of full-time workers either work flexibly already, or wish they could. The numbers are similar for men (84%) and women (91%)¹²⁷. Currently amongst people who are not working, 93% want a job that includes some sort of flexibility. This may be a by-product of more women working full-time and more men taking on responsibilities beyond the workplace¹²⁸. For many parents, older workers and people with health issues and disabilities, full-time work isn't something they are able to commit to. Gig economy work will be more pronounced in London as 27% of gig workers are based in London compared to 17% of self-employed workers and 13% of employees.

Technology

Labour-based platforms of the sharing economy are generating jobs with lower barriers to entry for some roles. Technology is reducing the transaction costs, creating more space for sole traders and micro businesses. The impact of automation and increased technology use, leading to losses of certain jobs, could prompt people to move into the gig economy.

Although the gig economy is relatively new, the changes in employment, changing demographics and increased technology point to it becoming a fixed part of London's jobs market.

Implications:

- People will have more diverse careers and will more likely to do supplementary work.
- The government need to take action to ensure workers can be offered flexibility without insecurity.
- Gig economy work and self-employment will need to become part of employment advice.

3. Potentially disruptive effects of technological advances such as automation, 3D printing and artificial intelligence.

Up to around 30% of existing UK jobs are susceptible to automation from robotics and Artificial Intelligence (AI) by the early 2030s, but in many cases the nature of jobs will change rather than disappear¹²⁹.

The increase in demand for automation is going to be driven in a number of ways. Research shows that the main contributor to the UK's economic gains between 2017 and 2030 will come from product enhancements stimulating consumer demand. This is because AI will drive a greater choice of products, with increased personalisation and make those products more

¹²⁶ Ibid

¹²⁷ Timewise Talent Through flexibility timewise.co.uk

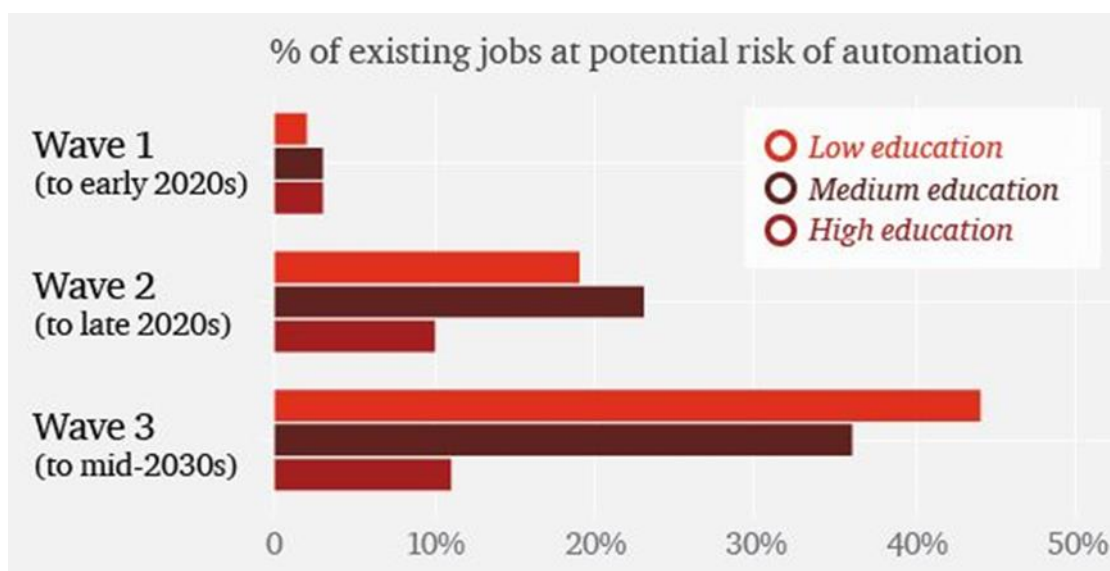
¹²⁸ Counting the Hours Resolution Foundation

¹²⁹ PWC How will automation impact jobs?

affordable over time. Also prices of technology are falling by 10% annually, both for programming and installation costs and for the cost of the robot itself¹³⁰.

The likelihood of automation is highest in sectors such as transport, manufacturing, and wholesale and retail, and lower in education, health and social work. The projections show that level of education has a significant impact on the level of risk individuals face in relation to employment.

Figure 75: Potential risk of automation



Source: PWC Estimates based on OECD PIAAC data (Median values for 29 countries)

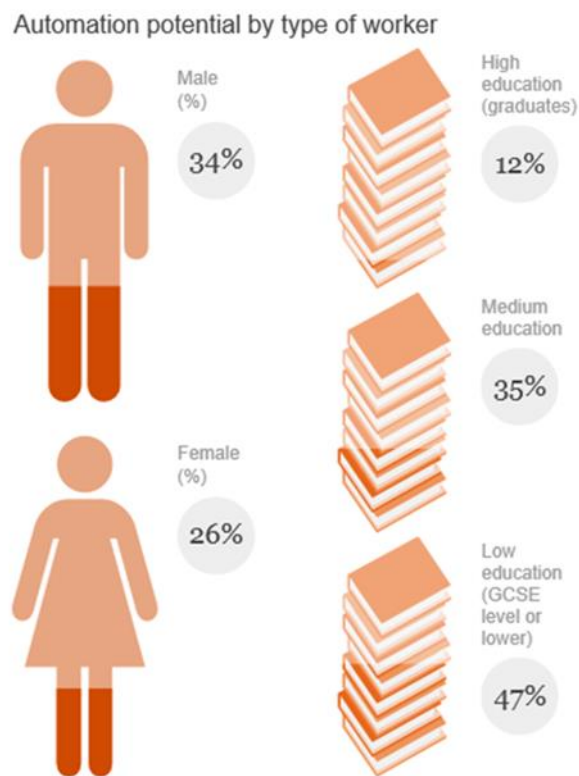
Automation is expected to impact various elements of people’s lives. To understand the impact automation will have on the education and skills landscape focus needs to be on the impact on specific industries and the knock on effect of training and skills needs. Understanding the way sectors and industries will adapt, and then looking at the impact on specific groups, will give us an overview of actions to take in relation to technology. For example, investment in productivity raising technology is lower in sectors dominated by women, such as care and retail, and therefore automation may not occur; rising demand in these sectors, especially care, could also absorb workers, predominantly women, from automating industries. The result of this is that although women’s jobs aren’t at risk; some women may instead find themselves continually in low-paid jobs¹³¹.

The impact of automation will be different in different sectors and as described above, routine tasks are more at risk of automation than jobs. The illustration below shows the risks based on gender and education.

¹³⁰ Ibid

¹³¹ IPPR 2017 Managing Automation Employment, inequality and ethics in the digital age

Figure 76: Risk of automation in 2030



Source: PwC estimates based on analysis of OECD PIAAC data

Jobs which require dexterity, cultural sensitivity and social skills are much less likely to be automated. However, these sectors will still make use of technology in one way or another. An example of this in the health care sector is that robots will not replace doctors but doctors will increase their use of technology to support their everyday work.

Implications:

- Automation will boost productivity and wealth, leading to additional job gains elsewhere in the economy - but income inequality may rise and then economic, legal and regulatory constraints may restrict the pace and extent of increases in automation, in practice.
- As jobs are lost through automation, there will be a need for a dynamic, responsive reskilling and upskilling infrastructure.
- Ensuring skill and qualification attainment in secondary and post-secondary education will be critical to providing Brent residents pathways to high skilled jobs, which are less vulnerable to automation.

4. Mismatch of employees' skills, needs and qualification levels to the job market

In recent years, employment policy has focused on getting people into work. Considering, the employment rate was 78.1% in 2019, the highest since comparable records began in 1971¹³² there should also be a renewed focus on: the demographics of the working population, the kinds of work that is being offered and, in turn, what skills are needed.

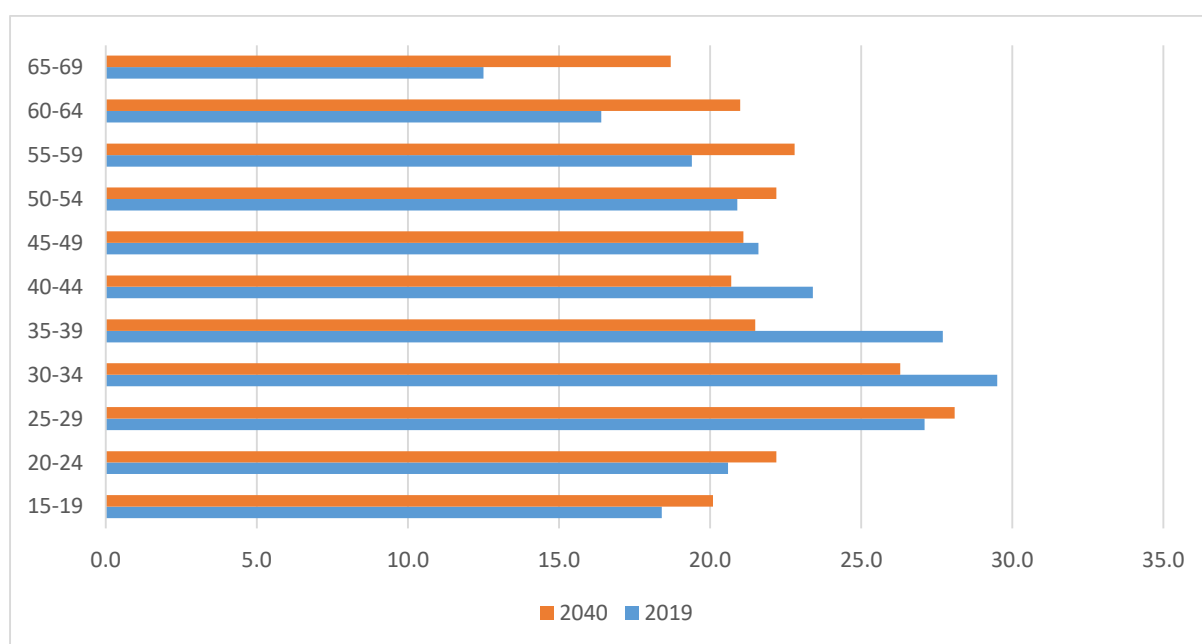
¹³² ONS UK labour market: March 2018

The UK population is becoming more educated, the number of people classed as graduates has risen from 24% in 2002, to 42% in July to September 2017¹³³. Currently, in the UK 52% of female graduates and 48% of male graduates are working in jobs that do not require a degree. More generally younger workers are earning less than previous generations did at the same age and are more likely to find themselves in insecure, low-paying jobs¹³⁴.

There is also a prediction that there will be a surplus of lower-level qualifications in coming years. For example, 1 million people aged 30+ are expected to hold qualifications below level 2 in 2022, but only 0.7 million jobs are expected to require qualifications at this level¹³⁵.

A lack of suitable work is not exclusively an issue for the younger generation there are also issues for older people finding work that matches their needs. Older workers are going to play an increasing role in the workforce as life expectancy and retirement ages rise.

Figure 77: Age Demographics of Working Age Population



Source: 2016-based Subnational Population Projections for Local Authorities

Older workers are more likely to have health conditions and caring responsibilities¹³⁶. In order to productively participate in the workforce older workers will need to have a good work life balance. This is currently an issue in the UK, with an estimated 1 million people aged 50-64 having been pushed out of work involuntarily, with the main reasons for exit being health conditions and caring responsibilities¹³⁷. There are a variety of demographic and policy changes which will impact older workers going forward.

By 2041, 16% of London’s population is projected to be aged 65 or older, compared with 11% in 2014. The number of London residents over 65 in employment rose by 70,000 to 128,000 between 2004 to 2015, with an increase in the proportion of 16+ London residents in employment from 1.6% to 2.9%. Over the period 2010-18, the State Pension Age for women was equalised with that of men at 65. From 2019, the State Pension Age will increase for both men and women to 66 by October 2020, and the government plans further increases, which

¹³³ ONS Graduates in the UK Labour market: 2017

¹³⁴ The kids aren’t alright: a new approach to tackle the challenges faced by young people in the UK labour market

¹³⁵ IPPR Jobs And Skills In London Building A More Responsive Skills System In The Capital

¹³⁶ A silver lining for the UK economy?

¹³⁷ Fuller Working Lives

will raise the State Pension age to 67 between 2026 and 2028¹³⁸. There has also been a significant decline in the availability of final salary pension schemes and their replacement with what are generally considered to be less generous defined contribution schemes. Payment out of some of these schemes may be linked to the State Pension Age. In addition, the introduction of Employment and Support Allowance from 2008 tightened the gateway onto incapacity benefits, and access to benefit income to support early retirement¹³⁹.

In the West sub-region, the working-age resident population is projected to increase from 1.37 million in 2014 to 1.55 million in 2041 (up 14%). This is in line with the projected 16% increase in the working age population across London as a whole (up from 5.85 million in 2014 to 6.77 million in 2041). The age cohorts that are expected to increase the most over this period include 16-24 year olds and those aged 35 years and over¹⁴⁰. This population growth indicates that in 2041, there are likely to be approximately 114,000 more young people across London, and 25,000 more young people in the West sub-region, within the key learning cohorts of 16-18 and 19-24.

It will become increasingly important for employers to provide opportunities to up-skill and to work more flexibly. There is evidence that flexibility low obligation work patterns suit some older people who wish to semi-retire¹⁴¹. The impact of an ageing workforce will vary according to industry, for instance, 46% of inactive men aged 50-64 who had been working in the construction sector left for a health reason¹⁴².

Gender will also impact the need for flexible work, women of childbearing age reported higher levels of overemployment, perhaps because they experience a greater need to work fewer hours in order to care for their children and family. Notably, this trend is not stable across women's working lives, the gender difference diminished in the years before retirement age. For this age group, childrearing responsibilities are likely to reduce, and therefore the overemployment rates were similar between men and women¹⁴³.

¹³⁸ Department For Work and Pensions Women's State Pension age under the Pensions Act 1995

¹³⁹ Ibid

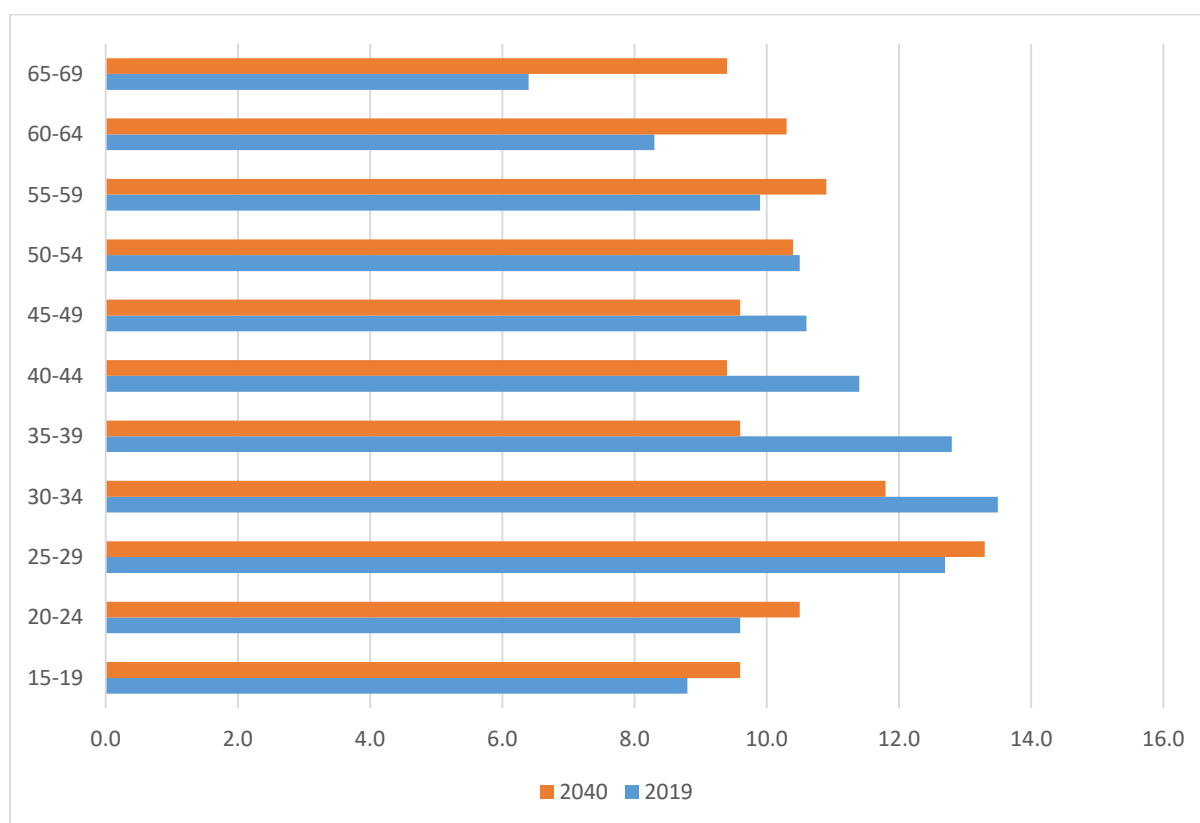
¹⁴⁰ See GLA Economics (2016). Working Paper 76- "Trends in the demand for labour and skills in London and the West Sub-region".

¹⁴¹ Unfinished Business: Barriers and opportunities for older workers

¹⁴² Fuller Working Lives

¹⁴³ Characteristics of the underemployed and the overemployed in the UK

Figure 78: Women of Working Age 2019 and 2040



Source: 2016-based Subnational Population Projections for Local Authorities and Higher Administrative Areas in England

Projections show that the female population working age will increase in the over 50s categories, but decrease in the younger demographics. In these age groups there is an increased demand for flexibility in work.

It is essential that employers are giving people good opportunities and that workers are able to up or reskill to find suitable work. Policy-makers have previously focused on levels of unemployment, but an increasingly pressing issue is the quality of work available. The supply side for employment is changing, it is older, more educated and requires more flexibility. There is a need for the demand side of employment to adapt to accommodate this.

Implications

- The anticipated surplus of workers with lower-level qualifications suggest that there is an important role for adult education and training in fostering qualifications attainment among workers. This is likely to include both an expanded role for part-time higher education for older workers, and new qualifications and routes into work among London's high-skilled jobs.¹⁴⁴
- A lack of affordable, accessible childcare may particularly represent an ongoing barrier to employment for women and low-income families in the future while also constraining their ability to seek training and further education opportunities.
- As the labour market of the future is anticipated to be characterized by increased flexibility, with work being more fluid and on demand, childcare provision may need to be made more flexible to accommodate the evolving work culture of parents.

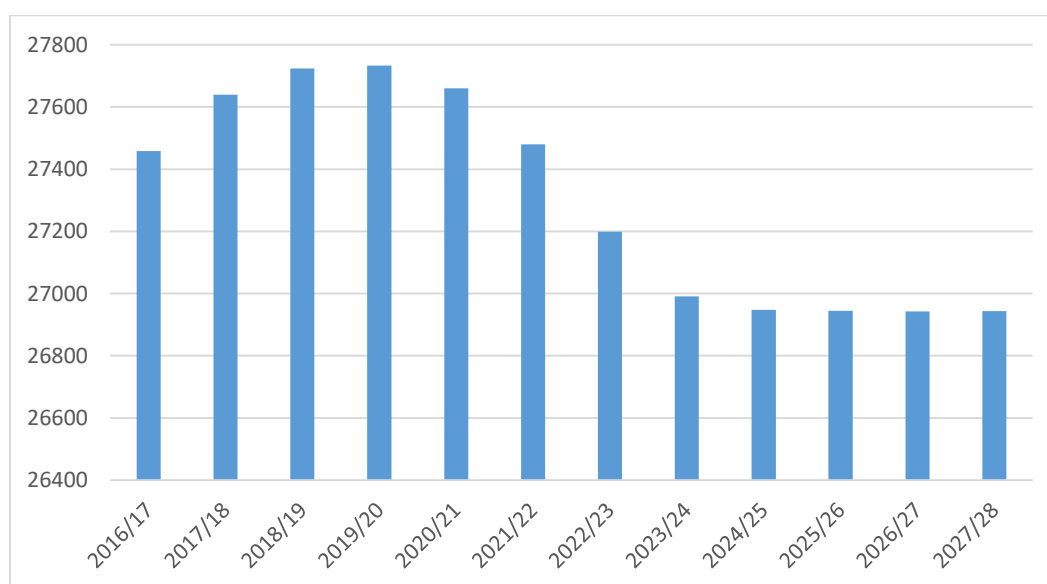
¹⁴⁴ See Institute for Public Policy Research (2016). "Jobs and Skills in London: Building a more responsive skills system in the capital".

- Changes in the point at which people retire are relatively recent such that statistics on their combined impact are rather limited at this stage. In particular, it is difficult to interpret what the exact long-term impact is likely to be.
- Participation by older workers in the workforce for longer will demand more flexible working arrangements.
- Potential impacts could include increased demand on adult learning services and consideration of the type of services which may benefit learners 65 or older.
- Given the larger working age population aged over 25, other things being equal, there is also likely to be an increase in the number of adult learners, as well as in workplace training. Accordingly, there will likely be an increase in the demand for adult learning courses and training options.

5. Demographic changes and uncertainty around the future school funding and demand for school places may influence the quality and provision of schools

In recent years Brent has seen an unprecedented increase in the demand for primary school places. The primary school pupil population increased from 21,427 in May 2008 to 26,502 in May 2016, an increase of 23.7%. The latest GLA projections (based on the schools' census of January 2017) indicate that demand for Reception places will reduce from 2017 onwards underpinned by a decrease in birth rates, before recovering to near 2017 levels and then is projected to remain quite static until 2028.

Figure 79: Primary Projections 2016-2028

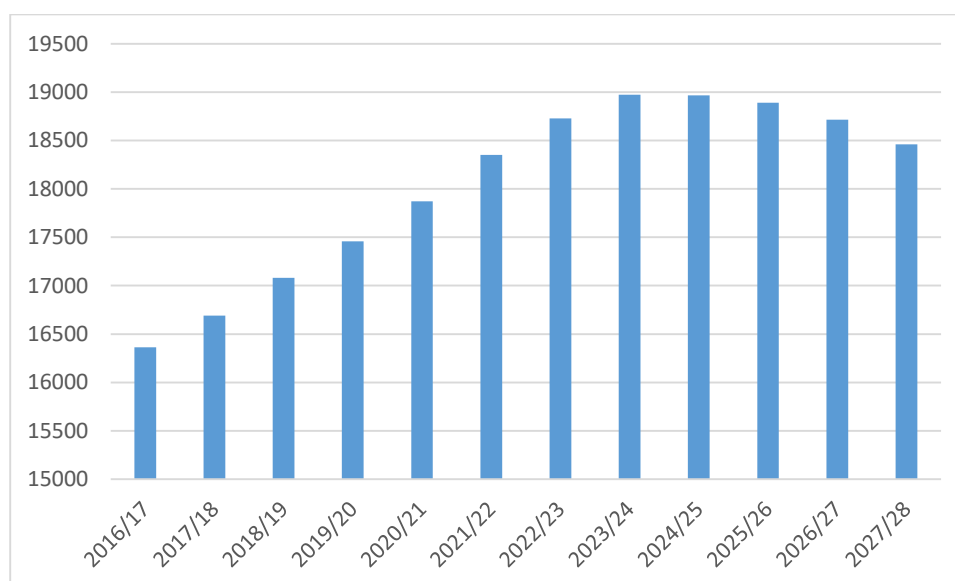


Source: GLA 2018 Projected demand for school places

As in the past Brent has experienced considerable volatility in the primary-aged population and, while overall projections indicate a downward trend, it is likely that there will be growth and continued pressures in some areas of the Borough or in specific year groups.

The significant growth in pupil numbers that has been seen in the Primary phase, both in Brent and across London, is now beginning to progress into the secondary phase.

Figure 80: Secondary Projections 2016-2028



Source: GLA 2018 Projected demand for school places

The latest GLA projections indicate a need for an additional 12 secondary forms of entry in Brent by 2023/24, which could be provided through a combination of new schools and expanding existing provision. This is equivalent to two new secondary schools. Projections regarding secondary places indicate growth in Year 7 of 22% between 2016 and 2023. Brent faces considerable challenges in finding sites for new schools.

Factors that could change future forecasts and demand for individual schools include changes in parental preference patterns and their ability to access places in out-of-borough secondary schools as neighbouring boroughs face school place challenges similar to Brent; potential movement out of the borough as lower income families find it difficult to remain in London as a result of the housing benefit cap; whether EU citizens in Brent start to leave the UK post-Brexit, potentially leading to some reduction in pupil numbers.

In addition, to the uncertain landscape around school space capacity needs, one trend which will potentially further impact the borough's role in facilitating the provision of high quality primary and secondary education is reforms to school funding. The introduction of a national funding formula for schools in 2018/19 and the announced 0.5% increase which schools are to gain per pupil will do little to address the significant cost pressures faced by Brent schools. Although Brent schools do have significant balances they will clearly be facing a financial challenge in addition to the impact of the funding reforms.

The impact of national insurance increases, pension contributions and the Apprenticeship Levy are estimated to reduce spending power by 8% by 2020¹⁴⁵. There will also be general inflationary pressure on supplies and services.

Implication

- Ensuring the provision of school places and of high quality education provision at the primary and secondary school levels will be critical to the future prosperity of Brent's residents and the borough. Even in the context of potential future uncertainty and fiscal pressure, Brent must prioritise this provision.

¹⁴⁵ School Funding In Crisis NAHT.org.uk

Responses

This section briefly considers how Brent can respond to the trends outlined above to shape education and skills provision so residents have the chance to access pathways to high skilled jobs in the growing knowledge economy of the future.

1. Changes in employment demand with most new jobs in London expected to take place in knowledge sectors, and professional/managerial in nature.

The recommendations from the Haringey STEM Commission¹⁴⁶ provide a foundation for understanding the increasing importance of STEM knowledge to the evolving economy, the gaps that exist today and how local government can play a role in facilitating greater engagement around STEM education at a borough level.

One suggestion for Haringey was to convene a panel of employers, business leaders and experts to help develop and accredit a “Haringey Diploma”, a framework of skills and experiences that young people should have when leaving education, supported by a programme of extracurricular activities and experiences. This would be based on, but not limited to, STEM subjects, and would include communication and presentation skills, problem solving, project working, creativity and entrepreneurship.

Another suggestion was that Haringey schools should jointly appoint a Haringey STEM Coordinator funded by the Networked Learning Communities to open up access to and coordinate STEM extracurricular provision across Haringey. The Coordinator, working with expert partners, should identify, evaluate and broker partnerships with the best providers of STEM education and experiences.

In general, the council should focus on ensuring that there are opportunities for those of all ages to learn and be involved in emerging industries. There is much focus on technological and industry specific training. This could be by making use of political momentum on technological education. As well as encouraging business to boost career progression and upward movement of workers to prevent skilled workers being trapped in low paying, low skilled positions and to prevent workers being pushed into indefinite part-time careers.

2. Way of Working: The Rise of Self Employment & the Gig Economy

The response to the rise of self-employment and the gig economy is partially dependent on the outlook the UK government takes on the gig economy overall. In some countries including Spain and Sweden they have banned apps like Uber for their disruptive effects on the countries taxi industries. Thus far the government has not indicated that this is the path they wish to follow. However, the rising public awareness of the gig economy and its problems in relation to employment rights (see landmark court cases about Pimlico Plumbers, Uber and Deliveroo) means that a policy response is required.

A report by the RSA suggested that a dedicated statutory service could offer gig workers advice and general counsel about their employment rights, and information and guidance on the self-assessment process for taxes. In addition, ensuring that council run employment

¹⁴⁶ Haringey Council (2016). “The Report of the Haringey Stem Commission”

services like The Living Room and Brent Start can provide people with information about gig economy work could support them in getting people into work that could suit their needs. They could also advise about the potential pitfalls of gig economy work. Guidelines about rights and responsibilities as a gig economy worker could be disseminated by the council to ensure residents are making informed choices.

Another approach the government could take is by setting out a charter for good work practice. This could be done by collaborating with platforms, civil society, and workers themselves, to shape what this looks like specifically within the gig economy. Collaborating on this Charter will provide an opportunity to put shared regulation into practice as different stakeholders work towards a shared goal. It will serve as a starting point for committing to a new way of working together, as well as ensuring that work is fairer as the gig economy grows¹⁴⁷.

3. Potentially disruptive effects of technological advances such as automation, 3D printing and artificial intelligence.

The introduction of technology is not inevitable. IPPR identified five things that will be particularly important in influencing the pace and extent of automation: the cost of technologies, the cost of capital and labour, the economic benefits of automation, the balance of economic power between labour and capital, and social and regulatory acceptance. All of which are likely to occur at different rates in different sectors and have differing impact on skills requirements.

It is essential that the positives associated with technology are not overlooked. It has the potential to improve the UK's productivity problem. The UK has lower levels of productivity than other advanced economies and the introduction of technology could improve this. If managed well, it could have many positive effects including: better, more 'human' work, increased leisure time, improving living standards and less environmentally damaging forms of production. In terms of work, technology has the potential to play a complimentary rather than competitive role for jobs that are not routine¹⁴⁸.

One way of responding to technology could be accelerating the adoption of technology could help to realise the benefits of technological advances as well as the adoption of digital technologies throughout the economy. This could be done by improving infrastructure, skills and encouraging businesses and start-ups to innovate in the field of technology¹⁴⁹.

The UK skills system needs to better equip people with skills to complement automating technologies and retrain where jobs are lost. The Apprenticeship Levy could be expanded to be a 'productivity and skills levy' that firms can use for wider skills training and utilisation.

It is important that there are regulatory frameworks in place to ensure that adoption of technology is done in a responsible way. An Authority for the Ethical Use of Robotics and Artificial Intelligence could be established to regulate the use of automating technologies. They could make recommendations to Government and business on the governance and use of robots and AI. This could be modelled on the Human Fertilisation and Embryology Authority (HFEA) that regulates embryonic technologies, ensuring that individuals

¹⁴⁷ RSA 2017 Good Gigs A fairer future for the UK's gig economy

¹⁴⁸ Resolution foundation 2016 Robot wars Automation and the labour market

¹⁴⁹ IPPR 2017 Managing Automation Employment, inequality and ethics in the digital age

determine the rules and ethical frameworks governing autonomous technologies before they become widely used¹⁵⁰.

More generally, the reduction of jobs in certain industries due to automation does not need to go hand in hand with redundancies, it can be created by a reduction in inflow in those industries. Directing young people towards growing industries could be a way of reducing the impact of declining industries in Brent. This should be done alongside providing opportunities for individuals to reskill and train.

4. Mismatch of employees' skills, needs and qualification levels to the job market

The role of information

In order to meet the training and educational needs of those struggling to afford childcare, action should be taken to address childcare needs. Information plays a key role in access to an uptake of childcare and many parents lack the right information about what is available. It was found that around 70% are not aware of their local family information service. Parents in lower income households were more likely to be unaware of childcare support than higher income households.

Information and guidance on childcare support have in the past been run through children's centres however as budget cuts continue to hit Local Authorities, there is a growing limit the role children's centres can play with many family information services moving to an online-only presence. One way the Council could improve uptake in childcare is by proactively raising awareness of existing subsidies for childcare with a targeted borough wide awareness campaign and by using parent champions, building on work spearheaded by the Family and Childcare Trust and implemented in Brent already¹⁵¹.

Increasing maternal employment

Low maternal employment is a key driver of child poverty with its associated impact on the development, health and wellbeing of children. When mothers are locked out of work, this also suppresses regional and national economic growth¹⁵². Accessibility to flexible, part-time work is a key barrier to maternal employment. Camden Council set up an adult apprenticeship scheme to overcome these issues and support parents into work. The scheme was targeted at women over 25 with children, although opened also to men, and aimed to support these parents into flexible, part-time apprenticeships that paid the London Living wage¹⁵³. The apprenticeship programme wanted to target the link between maternal unemployment and children poverty driven by high costs of childcare and lack of opportunities for flexible part-time work in London.

The role of employers

Employers also need to find innovative approaches to role design and use of technology to assist and enable people to remain in good quality work for longer. This is an important consideration in the context of an ageing population. Currently, a quarter of all workers who do not think they could do their current job over the age of 60, rising to one in three for lower-

¹⁵⁰ Ibid

¹⁵¹ Ibid

¹⁵² Institute for Public Policy Research (2017). "The Future of Childcare in London."

¹⁵³ Camden Council (2014) 'You're hired!' Apprentice success as Camden helps plug maternal employment gap. Available at: <http://news.camden.gov.uk/youre-hired-apprentice-success-as-camden-helps-plug-maternal-employment-gap/>

skilled manual workers. Employees over the age of 50 are most likely to say that working part-time or less hours would encourage them to delay retirement. Workplace flexibility is crucial to help people manage both health conditions and caring responsibilities. There needs to be a balance, a way to ensure that people are not forced into flexible work because they do not have the skills to access higher quality work. Also, that those who need flexible work to fit with their other priorities have access to these roles.

This can be addressed by employers who have direct control over job quality and role design. This is a proved method of retaining older workers who have skills and experience that employers want. Camden Council has addressed barriers to employment by engaging with employers to identify adult apprenticeship opportunities. Adult apprenticeships are designed to present an affordable and attractive solution for parents and employers. These apprenticeships offer flexible hours and pay the living wage (through Council subsidy)¹⁵⁴. Camden Council provided job descriptions and adverts, and a pre-screening function for employers, to ensure that candidates had the appropriate required functional skills (e.g. English and Maths) for an apprenticeship. Employers thought adult apprentices were likely to be highly motivated, and cited skills gained through more life experience as a benefit. Private sector organisations like Barclays and Whitbread are increasing providing more 'Pensionships', which aim to retrain older people¹⁵⁵.

Increased focus on careers advice may also work to support people to ensure they know what roles are available to them. Organisations like Timewise that specific cater to people looking for flexible roles, for example.

5. Demographic changes and uncertainty around the future school funding and demand for school places may influence the quality and provision of schools

Schools pressures are evident across the UK and there are a number of solutions which have been trialled to ease this pressure. In school planning there is a need to plan school places and redesign the way that schools are made. The shortage of available land for school-building is leading to the creation of larger schools, particularly primary schools, and one solution in areas that will see the most growth could be more 'super schools', of ten form entries or more. Local Authorities could also respond to the challenge by creating 'super-secondary's' with sufficient space and facilities for 4,000 pupils, but London would still need to create 22 such schools by 2020 to accommodate the growing school population¹⁵⁶.

When there is unprecedented growth in the school population quick, inexpensive and practical solutions are sought. One solution which is often used are modular or temporary classrooms. This method allows schools to grow with the demand. Scape, a public sector organisation that offers the Sunesis model describes its features as:

- A defined layout and specification with options to personalise
- A fixed cost
- A guaranteed construction programme - as little as 26 weeks for a 1FE school
- All regulatory approvals

¹⁵⁴ Interim Evaluation of an adult apprenticeship programme: Camden Council 2015

¹⁵⁵ Fuller Working Lives

¹⁵⁶ The Scape Group The School Places Challenge

The London Borough of Harrow used this method to extend several of its primary schools as part of its School Expansion Programme, Lungfish architects designed three different schools as part of the £12 million programme, providing over 690 new school places and improving facilities and the internal environment for around 2,126 pupils across the borough¹⁵⁷.

Schools also have the option of extending up or down. For many schools with severely limited space, many are looking to build additional floors to the buildings. This is often a very practical solution, and one that doesn't extend the footprint of the building. The biggest challenges we have seen are around the cost of adding a new floor and the stability of foundations to support it.

¹⁵⁷ The Scape Group Case Studies

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Executive Summary

Over the next 20 years delivering enough housing to accommodate a growing population will continue to be one of the most important and structural issues in Brent. As London's population continues to grow, to over 10.8 million between 2019 and 2040, housing delivery will have to accelerate beyond current levels in order to meet the increased demand. Brent's population will reach 400,000 by 2040, which will have extensive impacts in the borough including increased demand for good quality affordable housing. Brent Council will have to adapt to a new and changing housing scenario where lifestyles trends, affordability and tenure will redefine the housing market, both in the private and public sector.

To understand the future of housing in Brent the report starts with a baseline overview of current housing provision in the borough considering: tenure, open market, affordable housing, housing benefit, homelessness, temporary accommodation, overcrowding, rough sleepers, specialist housing need, partnership working and the private rented sector. This chapter will also look at key pieces of legislation and policy initiatives affecting decision makers in Brent. Key findings from this analysis include:

- Although Brent has continued to increase its dwelling stock over the last 10 years (period 2008 - 2018) by 8.23%, its current housing stock does not meet demand.
- With an area of 4,324 hectares, the population density in Brent at 78.8 persons per hectare (ha) is the highest in Outer London (mean average of 43.3 persons per ha) and the 14th highest in England and Wales.
- In 2018, there was a total of 118,710 dwellings in Brent, the 12th highest in the 33 London boroughs.
- The Draft London Plan (2017) sets a new target of 29,150 additional homes to be delivered in Brent over the period 2019/20 to 2028/29, an average of 2,915 per annum. This is almost double the 2015 target of 1,525 homes per annum.
- Whilst Brent has seen a 2.3% increase in average house prices in the year to February 2018, the overall picture shows a slowdown in the annual growth rate in London since mid-2016.
- Brent Council's managed housing stock consists of 11,509 homes as of March 2019, comprised of 7,764 council rented properties and 3,745 Leasehold properties
- A third of Council stock constitutes bedsit and 1-bed units that make up over half of all lettings, but under a third of demand. The demand for 3 and 4-bed units, however, is double the available lettings.
- In 2018, there were 55 Registered Providers (RP) operating in the borough, managing approximately 20,221 affordable homes to rent
- Since 1997 Registered Provider stock has increased by approximately 109%, a slightly faster rate than London (which increased by 100% during the same period).
- The number of housing benefit claimants in Brent reached its peak in 2012-13 at 38,099, as of March 2018 this number is 34,488, around a 9.5% reduction.
- Brent has the highest number of housing benefit claimants in all of the outer London Boroughs, and has the 2nd highest number of housing benefit claimants in social rented accommodation.
- As of 1st April 2019, 3,161 households are in Bands A-C on the Housing Register (those considered to be in housing need). In the period from April 2015 to April 2019 there has been an average 8.3% year on year reduction of households on the Housing Register.
- Brent has had one of the largest temporary accommodation portfolios in the country for many years. In 2019, Brent Council reports to have 2,191 households in Temporary Accommodation, a total reduction of around 50.8% since 2004.

- In 2017/18, 200 individuals were recorded rough sleeping in Brent, a 32% decrease on figures from 2016/17.
- Brent is currently developing and rolling out its New Accommodation for Independent Living (NAIL) project, which aims to identify develop and acquire alternative forms of care to residential care for all vulnerable adult groups.
- Owner occupation declined from 56% to 44% between 2001 and 2011, while private rent increased from 20% to 31% in the same period.
- As of Q3 2018, Brent had the 13th highest median private rent levels in London, and the second highest median private rent levels in outer London.

Consideration then turns to how housing provision in the borough can evolve in order to address the challenges and seize the opportunities presented by the following trends:

1. Change in demographic structure and household mix
2. Worsening supply and demand imbalance
3. Increasing unaffordability
4. The need for increased densification
5. Maximising land use through mixed use development
6. Increased use of Town Centres and High Streets for housing delivery
7. Increase of the private rented sector (PRS)

The implications of these trends include:

- Demographic changes will prompt the need for different housing typologies, increasing the demand for extra care, sheltered housing and leasehold schemes for the elderly but also increasing the demand for larger family homes.
- Higher housing targets set by the GLA and Brent indicate a need to accelerate housebuilding to an extent that outpaces historic housing delivery trends. Brent will require a large proportion of overall housing delivery to be affordable.
- Housing demand outweighing supply is having a knock on effect on affordability. There is a clear trend that housing costs are outstripping wages at high rates. This is effecting affordability of home ownership, private and social renting, and reducing mobility between tenures. Increased unaffordability has implications for levels of homelessness and poverty within the borough.
- Given London's scarce land supply and competing demands for land use, including demand for new homes to accommodate London's growing population, it is vital that higher density is achieved.
- Population growth in London demands not only increased housing delivery but also increased employment space and jobs. Mixed use development, which combines residential, infrastructure and commercial uses, and closer co-location of these uses, will need to be utilised across London to make the most efficient use of land.
- Due to their centrality and connectivity to the rest of the borough, demand for High Street and Town Centre housing will continue to grow, and in the context of declining retail in some areas represents an opportunity to boost both housing supply and footfall on the high street.
- London's Private Rented Sector (PRS) has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025
- . New models of PRS delivery will grow but reliance on PRS in the housing sector may have future affordability implications for some renters.

The chapter concludes with some potential responses to these trends. Suggestions are made as to how to accommodate the shift in demographics and housing trends, to maintain and

improve quality of life and adequate housing for residents of Brent into the future. These include:

- Providing specialist accommodation for the most vulnerable, but also options to accommodate multi-generational households and housing for working professionals.
- Diversifying the housebuilding industry in Brent to deliver the necessary step change in housing supply by increasing the number of actors on the stage, greater partnership working through joint ventures with small house builders and Housing Associations, but also through the Council itself.
- Ensuring a mix of tenures in housing delivery to combat unaffordability and to encourage mobility between tenures, as well as targeted approaches to combat the implications of unaffordability, including increased awareness of London Housing Allowance for PRS landlords and support for vulnerable adults at risk of homelessness.
- Looking to more innovative options for housing delivery, through increased densification in the 'suburbs', focusing on the utility of transport links and potential densification through above or around station development; and encouraging landowners to consider redeveloping sites that are currently used inefficiently – these include surface car parks and single-storey low density retail centres and stores – within Town Centres and High Streets.
- Finally, working more closely with private landlords to drive up standards in the PRS and explore options to improve affordability through Discount Market Rent products and initiatives such as London Living Rent.

Introduction

Over the next 20 years delivering enough housing to accommodate a growing population will continue to be one of the most important structural issues in Brent. As London's population continues to grow, to over 10.8 million between 2019 and 2040, housing delivery will have to accelerate beyond current levels in order to meet the increased demand. Brent's population will reach 400,000 in 2040, which will have extensive impacts in the borough including increased demand for good quality affordable housing. Brent Council will have to adapt to a new and changing housing scenario where lifestyles trends, affordability and tenure will redefine the housing market, both in the private and public sector.

This report outlines the role of housing in contributing to Inclusive Growth in Brent from 2019-2040. It considers how housing provision in the borough will need to evolve in order to address both the challenges and opportunities presented by the following trends:

1. Change in demographic structure and household mix
2. Worsening supply and demand imbalance
3. Increasing unaffordability
4. The need for increased densification
5. Maximising land use through mixed use development
6. Increased use of Town Centres and High Streets for housing delivery
7. Increase of the Private Rented Sector (PRS)

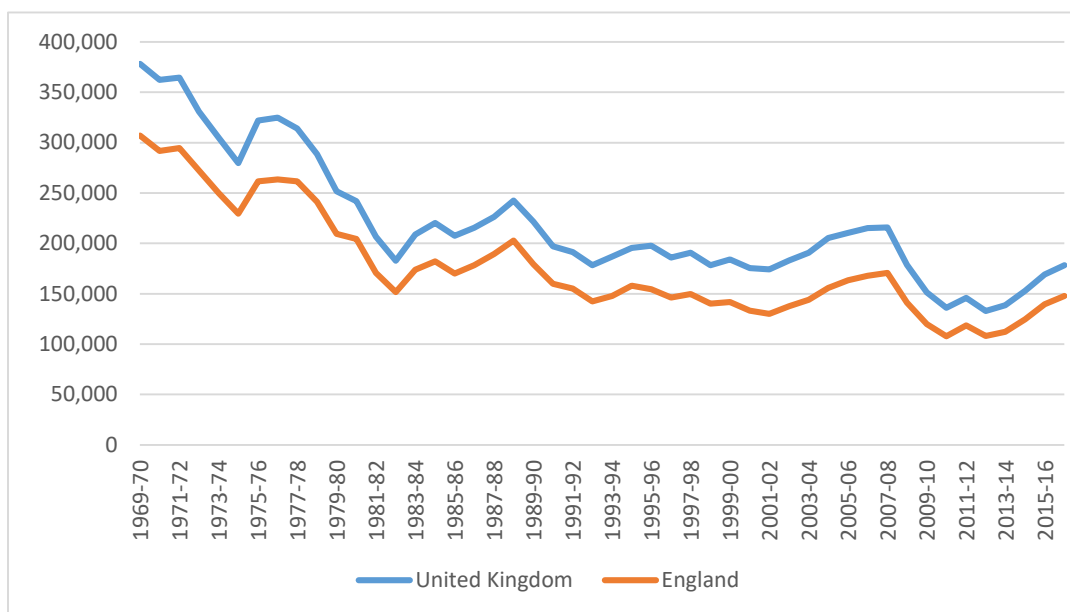
The report is organised into Baseline, Trends and Responses. Firstly, the **Baseline** section presents the context which defines the current status of housing provision in Brent. By examining both London and Brent, this section looks at changes in tenure types, prices and affordability; as well as, changes and policy responses in relation to housing benefit, homelessness, temporary accommodation and specialist housing provision; and finally, partnership working across the private and social rented sector and with the housebuilding industry. Secondly, the **Trends** section identifies and analyses key trends and the anticipated challenges and opportunities these will have for the housing sector. Thirdly, the **Responses** section presents potential strategies and policy choices that can address the challenges and create opportunity for Brent and its residents to prosper in the coming years.

Baseline Analysis

Housing Demand & Supply

House building in the UK has been on a long term downward trend since 1970 (Figure 81). Housing supply has continued to fail to meet demand despite increases in prices showing the housing markets unresponsiveness¹⁵⁸. Between 1969 and 1979, permanent dwellings completed decreased by 33%, from 1979 to 1989 there was a 12% decrease, from 1989 to 1999 there was a 17% decrease, and from 1999 to 2009 there was an 18% decrease. Despite an 18% increase in permanent dwellings completed from 2009 to 2017, supply has still not met demand, and for this reason the National Planning Policy Framework has specified the need *'to boost significantly the supply of housing'*.

Figure 81: Permanent dwellings completed, DCLG 1969 – 2017

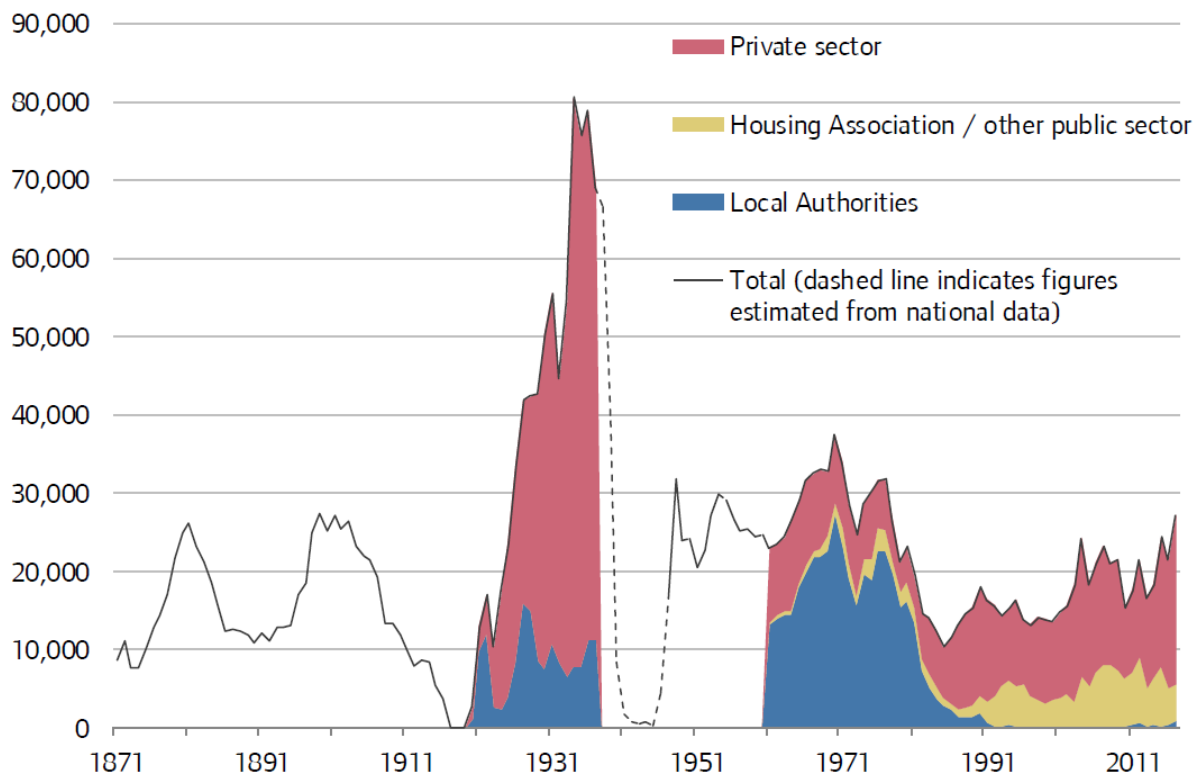


In London, the imbalance between supply and demand is exacerbated by faster population growth compared to the rest of the UK, as well as scarcity of developable land¹⁵⁹ among other factors. As such for many decades the number of new homes built in London is far less than the required need (Figure 82). The majority of homes in London are now built by private developers, moving away from the dominance of Local Authorities in the 1970s, with a proportion delivered by Housing Associations and other public sector bodies.

¹⁵⁸ Barker, K. (2004) Review of Housing Supply, Delivering Stability: Securing our Future Housing Needs, London: HMSO

¹⁵⁹ Ibid

Figure 82: Estimated number of new build homes completed in London by tenure, 1871 – 2017



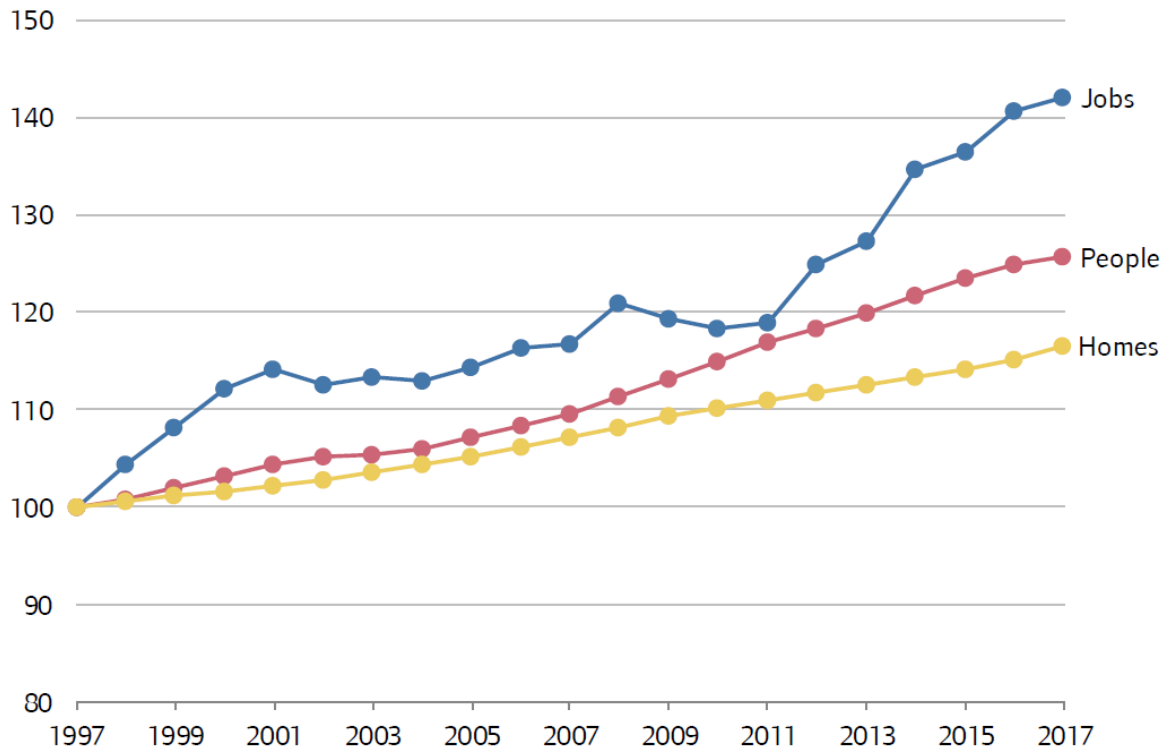
Source: GLA, *Housing in London: 2018*

The reliance on this private-led model of delivery has economic constraints. Due to the limited capacity within the private housebuilding industry, with a small number of volumetric house builders dominating the marketplace, and high costs of developing large sites, developers seek to recover their investment by increasing density, reducing the levels of affordable housing and building more slowly to ensure that local markets are not saturated and house prices do not fall¹⁶⁰. As a result, house prices have been consistently driven up, such that currently around 80% of new build homes are affordable to only 8% of London households¹⁶¹. At the same time, London continues to be an attractive place to live and work, meaning the increases in jobs and people have outpaced the number of homes available (Figure 83).

¹⁶⁰ Communities and Local Government Committee (2017) *Capacity in the homebuilding industry: Tenth report of Session 2016-17*, London: House of Commons

¹⁶¹ Greater London Authority (2017) *London Housing Strategy: Draft for Public Consultation*, London: Greater London Authority

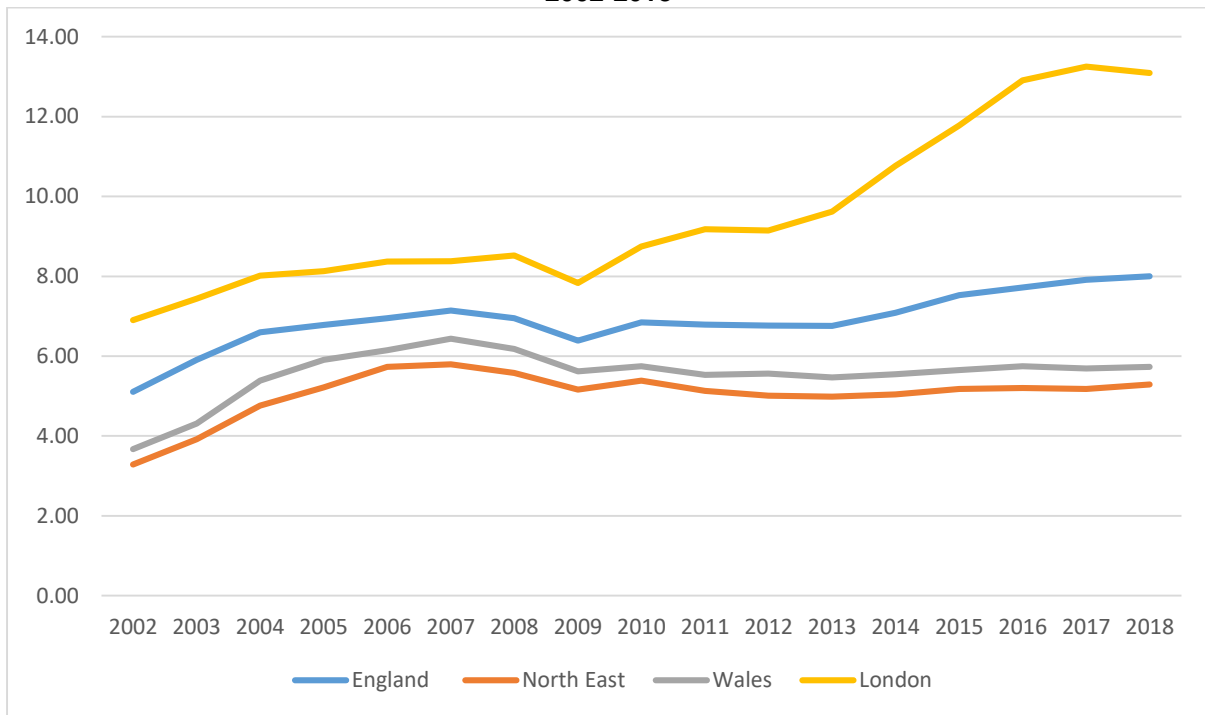
Figure 83: Indexed trend in number of jobs, people and homes in London, 1997 - 2017 (1997 = 100)



Source: GLA, *Housing in London: 2018*

London has become more unaffordable than the rest of the UK, with the ratio of median house price to median gross annual residence-based earnings being far higher than the North East – the most affordable place in England and Wales (Figure 84) However, London did see a decline in the ratio between median house price and median residence based earning in 2018, compared to 2017.

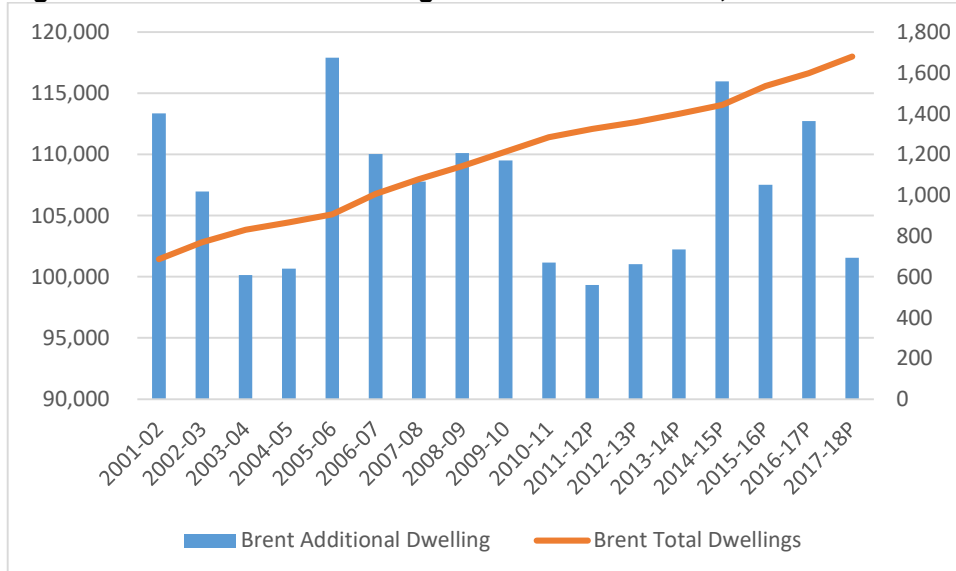
Figure 84: Median house price to median residence based gross annual earnings ratio 2002-2018



Source: Office for National Statistics: March 2019

Although Brent has continued to increase its dwelling stock over the last 10 years (period 2008 - 2018) by 8.23%, its current housing stock does not meet its demand (Figure 85). Moreover, Brent Council has been experiencing important changes in housing demand and supply since the 2001 Census, mainly in the tenure types and household sizes due its changing demographic.

Figure 85: Net additional dwellings total stock estimates, DCLG 2001 – 2018



Source: Total dwellings and net additions to stock per year, MHCLG: March 2019

Population

With an area of 4,324 hectares, the population density in Brent at 78.8 persons per hectare (ha) is the highest in Outer London (mean average of 43.3 persons per ha) and the 14th highest in England and Wales. Brent's population has seen a substantial increase from 311,215 to 332,697¹⁶² in the 2011-2017 period. In 2018, there was a total of 118,710 dwellings in Brent, the 12th highest in the 33 London boroughs¹⁶³. Brent's Local Plan (2010) projects development of over 9,000 homes between 2017 and 2026 but is currently being updated to be in line with the draft London Plan (2017). The draft London Plan (2017) set a new target of 29,150 additional homes to be delivered in Brent over the period 2019/20 to 2028/29, an average of 2,915 per annum. This is almost double the 2015 target of 1,525 homes per annum.

Since 2011, Brent's population has kept a relatively young age structure. In 2018, 32% of Brent's population were aged 0-24 years, slightly higher than the London average of 31%, while 12% of Brent's population were aged 65-80 years. Brent's average household size at 2.8 persons per household is the third highest in London, which affects the nature of the housing demand¹⁶⁴.

In 2018, 2.8% of Brent's population were older people aged 81+ years, compared to 3% of London's population. This age group is likely to experience complex care needs. The population in older age groups (aged 65 years or above) is projected to increase by a third of total population growth (around 22,000 individuals)¹⁶⁵. Having both a young population and an increasing number of people aged 65 years and over creates challenging and disparate housing requirements in Brent – to supply both larger family dwellings and specialist care facilities.

Tenure Types and Ownership

Since 1990, housing tenure has shifted towards the private rented sector and away from owner occupancy, both outright or with a mortgage. The share of households that own their homes outright has been relatively flat over the last two decades and stood at 22% in 2017, while the share that live in social housing has fallen slowly over the same period, reducing to 21% in 2017 – only the second time since 1981 that social tenants were the smallest tenure group. Changes since 2011 have been less dramatic, although the shares of mortgagors and private renters converged at 28% in 2016, there was a greater number of mortgages in 2017 (Figure 86).

¹⁶² Brent Council (2013) *Brent 2011 Census Profile*, London: Brent Council

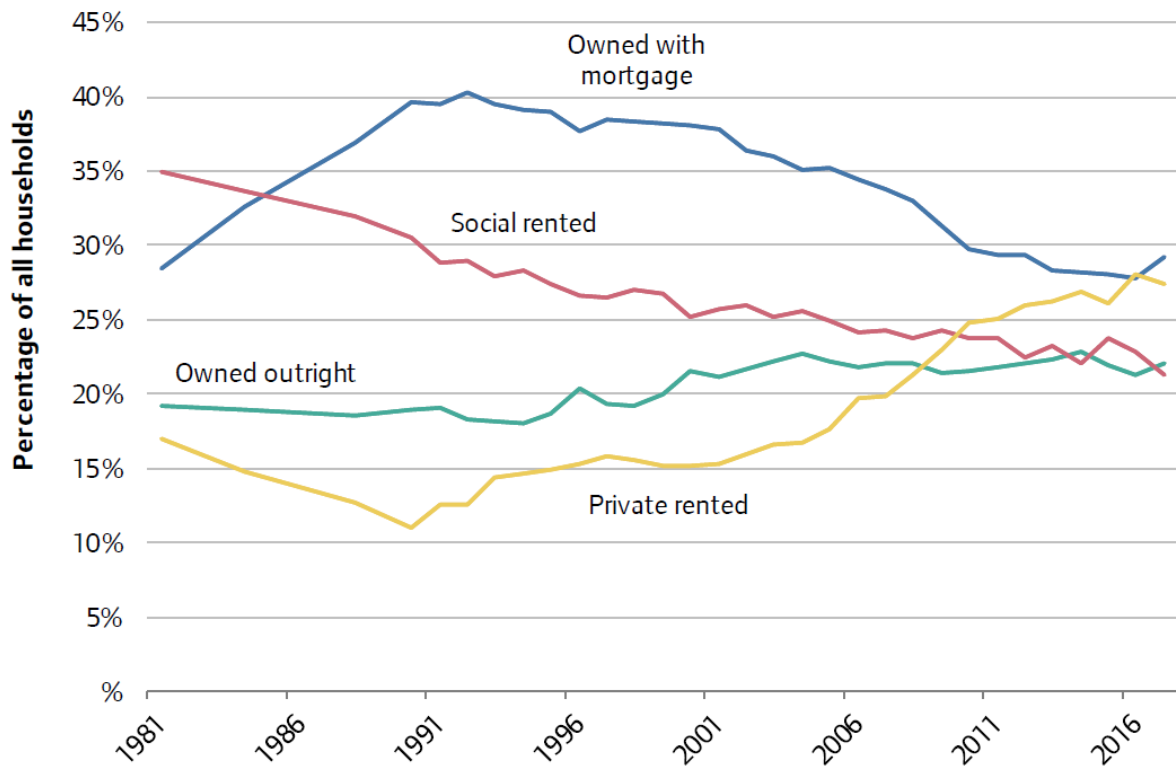
¹⁶³ Ministry of Housing, Communities and Local Government (2017) *Number of dwellings by tenure and district, England: Table 100*, London: Ministry of Housing, Communities and Local Government. Available at: <https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants>

¹⁶⁴ Office of National Statistics (2011) Census

<https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/families/articles/householdsandhouseholdcompositioninenglandandwales/2014-05-29#household-size-comparisons-within-the-united-kingdom>

¹⁶⁵ GLA Population Projections - Custom Age Tables: Long trend 2017

Figure 86: Annual trend in household tenure, London 1821 – 2017



Source: GLA, *Housing in London: 2018*

Different affordable housing rented tenure types can be identified in Brent, both in the public and private sector. We can find tenants under:

- Social Rent: by Traditional form of affordable housing owned and managed by Local Authorities and Registered Housing Providers. Low “formula” or “target” rents based on house prices and earnings, kept in line with the national rent regime, and made available on 2-5 year fixed term tenancies alongside lifetime tenancies at around 20%-50% of market rents.
- Affordable Rent: Introduced in 2010 under a government grant programme and subsequently defined in the National Planning Policy Framework in 2012. Owned and managed by Local Authorities and Registered Housing Providers, and designed for households in need of social rent housing, but with higher rents at up to 80% of market levels (inclusive of service charge), although in practice the average rent charged is around 65% of market rent levels. Generally made available on 2-5 year fixed term tenancies.
- London Affordable Rent: New product, introduced by the Mayor of London under the most recent grant programme. Lower rents more in line with social rents, but made available on fixed term tenancies.
- London Living Rent: Another new product from the Mayor of London. Despite the name, this is a rent-to-buy product. Rents are pegged at a proportion of local earnings to enable households to save. After 10 years the tenant is expected to either buy the home they are in outright or under shared ownership arrangements, or move out and buy somewhere else.
- Discounted Market Rent: Mainly delivered in larger Build-to-Rent (BTR) schemes, held in the private sector and made available under Assured Shorthold Tenancies (ASTs). Rents are set below market levels and inclusive of service charge. Tends to be delivered as an intermediate middle income product, rather than to meet local authority statutory housing duties.

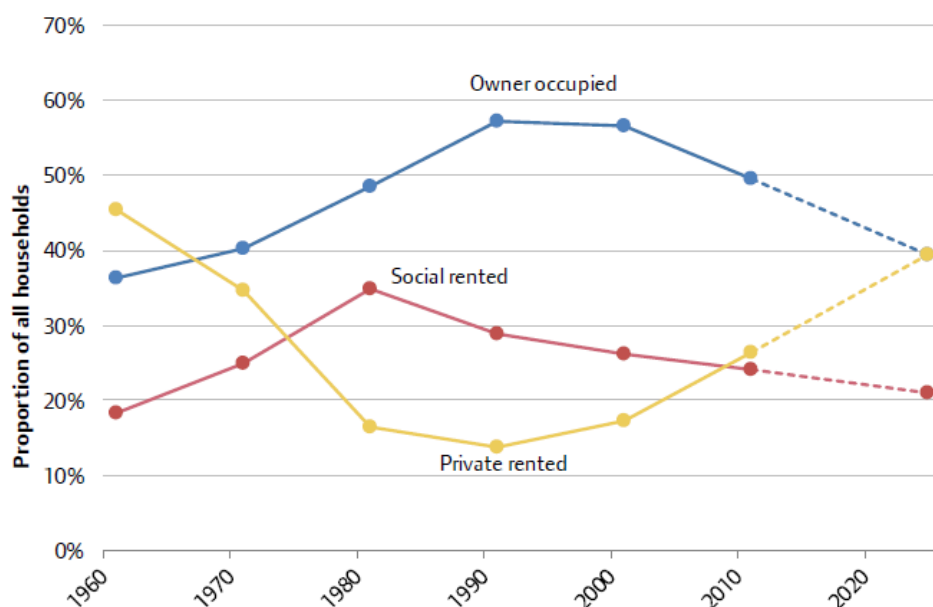
Recently there has been an increase of low cost home ownership options aside from conventional homeownership these include:

- Shared Ownership: The buyer purchases a share in a home, usually between 25%-75%, and pays rent on the remaining share retained by the landlord (usually a housing association but could also be a council or private developer). There is usually an option to buy further shares up to 100% outright ownership, which is known as “stair-casing out”. The purchaser is responsible for repairs and maintenance to the property.
- Shared / Fixed Equity: This is more unusual and mainly offered by housing associations and councils, for example to existing leaseholders on estate regeneration schemes. The buyer purchases a share as with shared ownership but does not pay rent on the remainder. The landlord will be repaid when the property is sold and share in any uplift in value.
- Starter Homes: Stalled government First Time Buyer (FTB) scheme drawn up in 2015. Buyer purchases the home at a discount to the full open market value, typically 20% discount, with the additional equity gifted to the buyer on condition the property is not rented out or resold for the first 5 years.
- Discounted Market Sale: Tend to be delivered in private developments. Buyer purchases the home at a discount to the full open market value, typically 20% discount, with the additional equity held by the local authority.

Open Market

The Mayor of London's Housing in London (2017) report suggests that by 2025 private renting will be at the same level as owner occupation (Figure 87). The continued decline in home ownership in London (and across the UK) stems from changes in lifestyles, with many millennials now choosing to rent, but has its main root in the increasingly unaffordability of housing.

Figure 87: Decadal trend in household tenures, London 1961-2011, with PwC projection to 2025

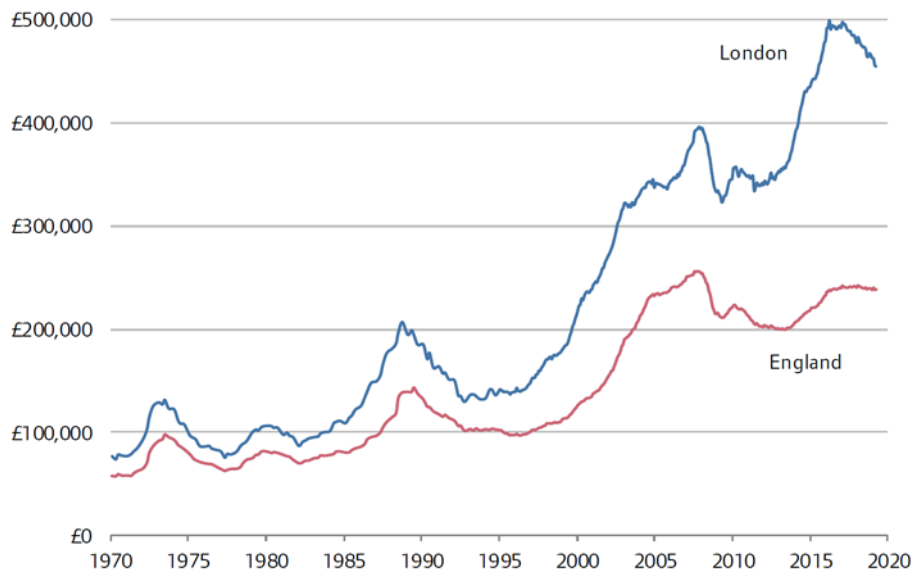


Source: GLA, *Housing in London: 2017*

Average house prices in London have grown more than six times from their 1970 level, after adjusting for inflation¹⁶⁶. The increase has been substantial since the late 1990s, particularly in London, but also evident in the rest of England. House prices have increased at almost double the rate of average weekly earnings over the same period, without adjusting for inflation, resulting in increasing unaffordability (Figure 88 & 89).

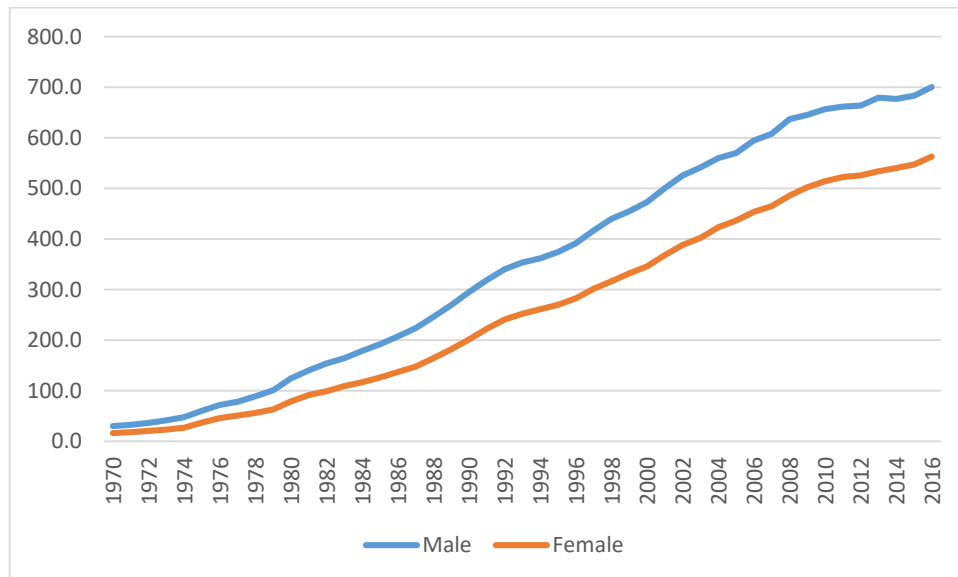
¹⁶⁶ Greater London Authority (2019) *HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

Figure 88: Average House Price, All Dwellings 1970 – 2019



Source: *Housing in London 201*

Figure 89: Average Gross Weekly Earnings, 1970 – 2016



Source: Office for National Statistics, *New Earnings Survey (NES) time series of Gross Weekly earnings from 1938 to 2017: 2017*

The ONS, *Housing Summary Measures (2016)* shows the median house price in London increased by 38% from £300,000 to £415,125 between 2011 and 2015. Over the same period, median gross annual salary increased by only 17% from £21,271 to £24,927.

The Land Registry House Price Index (HPI) shows the average property price in Brent increased by 78% from 2009 to 2019, from £261,000 to £464,000 (Figure 90). Over the same period, the ratio of median house price to median residence based earnings has increased by just under 65%, from 9.89 to 16.26¹⁶⁷. Whilst house prices have always outpaced earnings, in

¹⁶⁷ Office for National Statistics (2017) *New Earnings Survey (NES) time series of Gross Weekly earnings from 1938 to 2017*, London: Office for National Statistics. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/adhocs/006301newearningsurveynewestimateseriesofgrossweeklyearningsfrom1938to2016>

recent years there has been a stark increase (Figure 91). There is a disparity in house price growth between wards within Brent. Between 2009 and 2019, Brondesbury Park saw the highest average property price increase by 111% compared to Welsh Harp, with the lowest average property price increase, by 48% - a 63% difference¹⁶⁸.

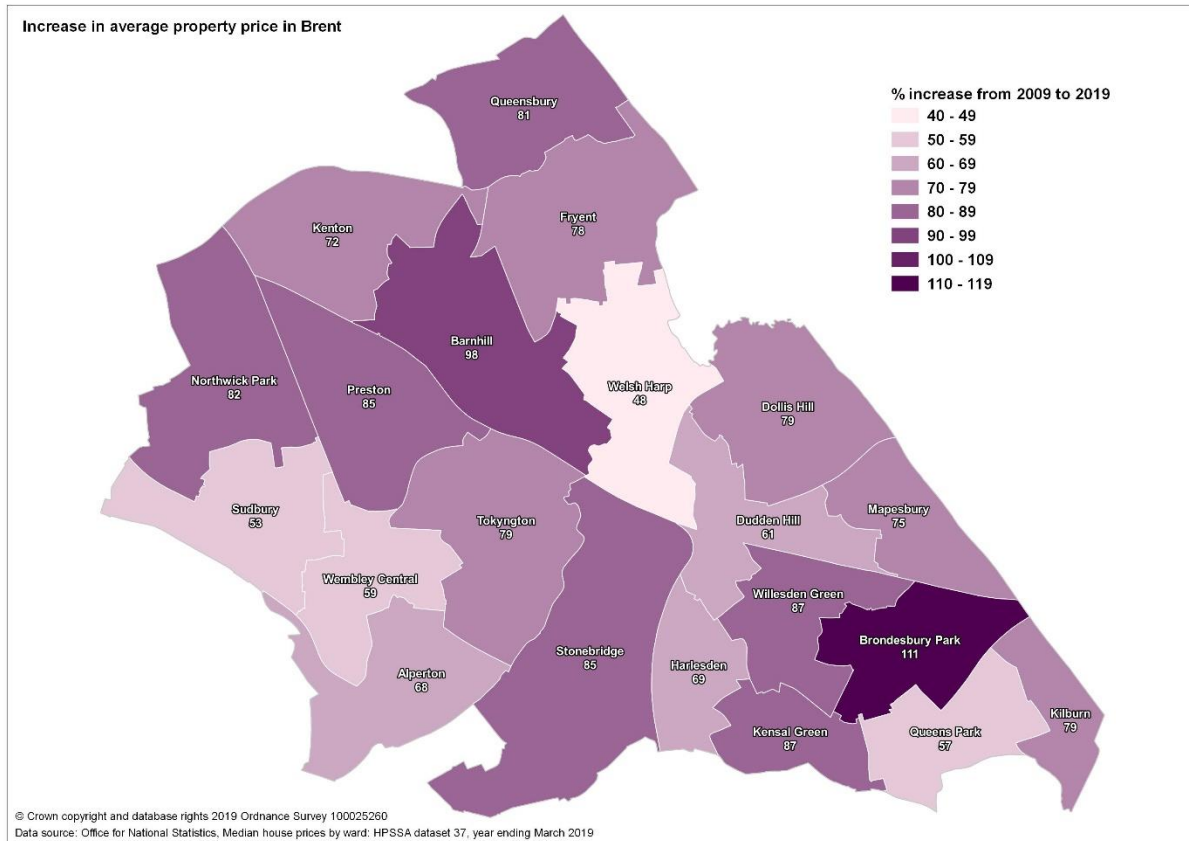
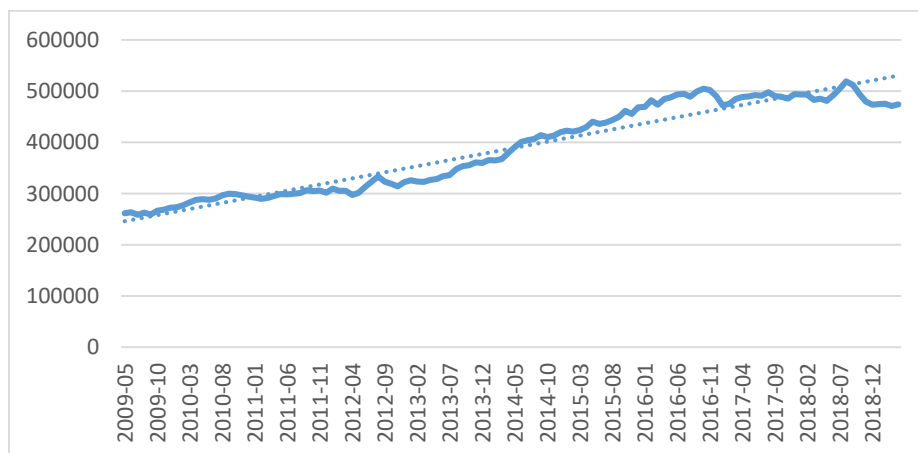


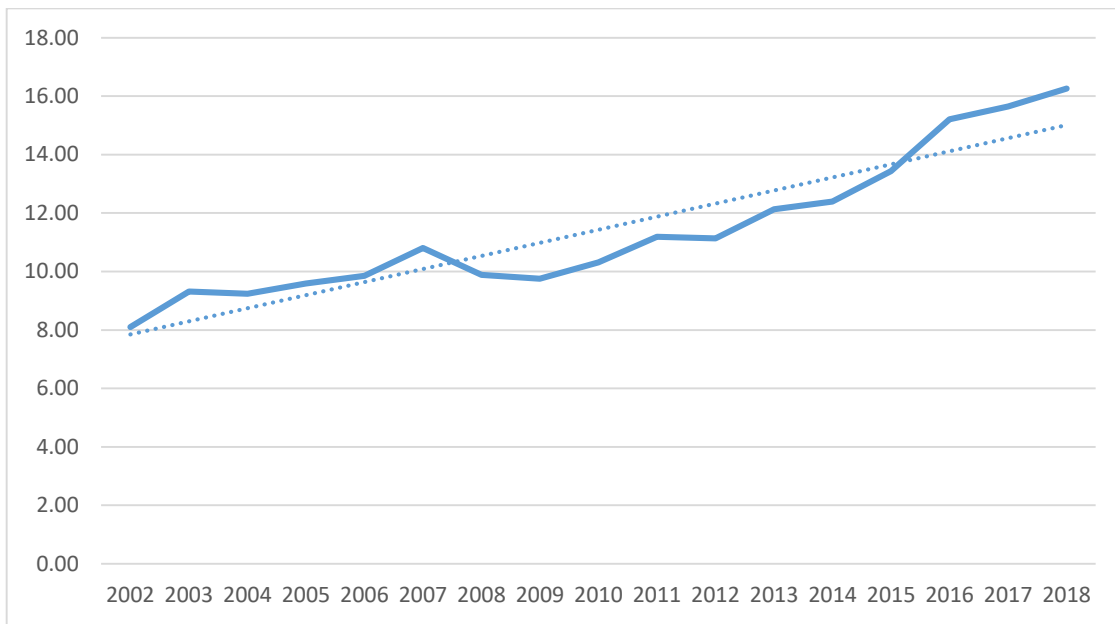
Figure 90: Average Price Paid for All House Types Brent, May 2009 – May 2019



Source: Land Registry House Price Index 2009 - 2019: May 2019

¹⁶⁸ ONS (2019) *House Price Statistics for Small Areas Table 1a*, London: Office for National Statistics Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/medianpricepaidbywardhpsadatset37>

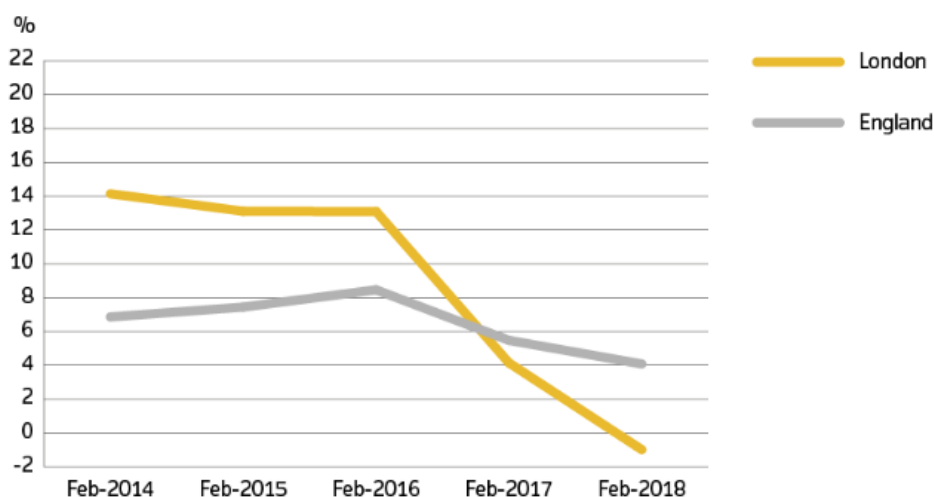
Figure 91: Median house price to median gross annual earnings ratio 2002 2018



Source: Office for National Statistics, 2002 to 2018: March 2019

Post the UK referendum to leave the EU and Stamp Duty Land Tax (SDLT) changes introduced in 2016, there has been some stagnation in the London property market. In London, average house prices decreased by 1.0% in the year to February 2018, the lowest annual growth seen since September 2009¹⁶⁹. Whilst Brent has seen a 2.3% increase in average house prices in the year to February 2018, the overall picture shows a slowdown in the annual growth rate in London since mid-2016 (Figure 92). Over a longer period, prices in the prime London market have fallen from their 2014 peak by an average of 6.1%. The prime central London market has been hit harder, with a decline in price of 13.2%¹⁷⁰.

Figure 92: Annual price change for England and London over the past 5 years



Source: HM Land Registry, UK House Price Index England: February 2018

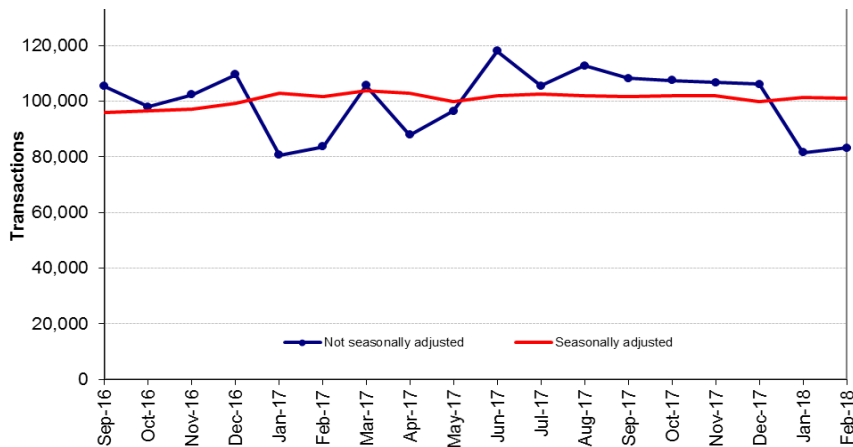
The stagnation in the property market is also reflected in the number of transactions completed in recent years. March 2016 saw the highest number of property sales, preceding the introduction of higher SDLT rates on additional properties in April 2016. HM Revenue and Customs reported the number of residential property transactions decreased by 1% in the year to February 2018 (Figure 93). Moreover, the Royal Institute of Chartered Surveyors (RICS) have reported that there has been a continued decrease in sales as a percentage of surveyors' stock within London¹⁷¹. All contributing to a weak and uncertain outlook for the property market in London.

¹⁶⁹HM Land Registry (2018) *UK House Price Index England: February 2018*, London: HM Land Registry Available at: <https://www.gov.uk/government/publications/uk-house-price-index-england-february-2018/uk-house-price-index-england-february-2018>

¹⁷⁰ Savills PLC (2017) *Spotlight: Prime London & Country, 'Mind the gap'*, London: Savills PLC

¹⁷¹ London Datastore (2018) *London Housing Market Report*, London: London Datastore. Available at: <https://data.london.gov.uk/housingmarket/>

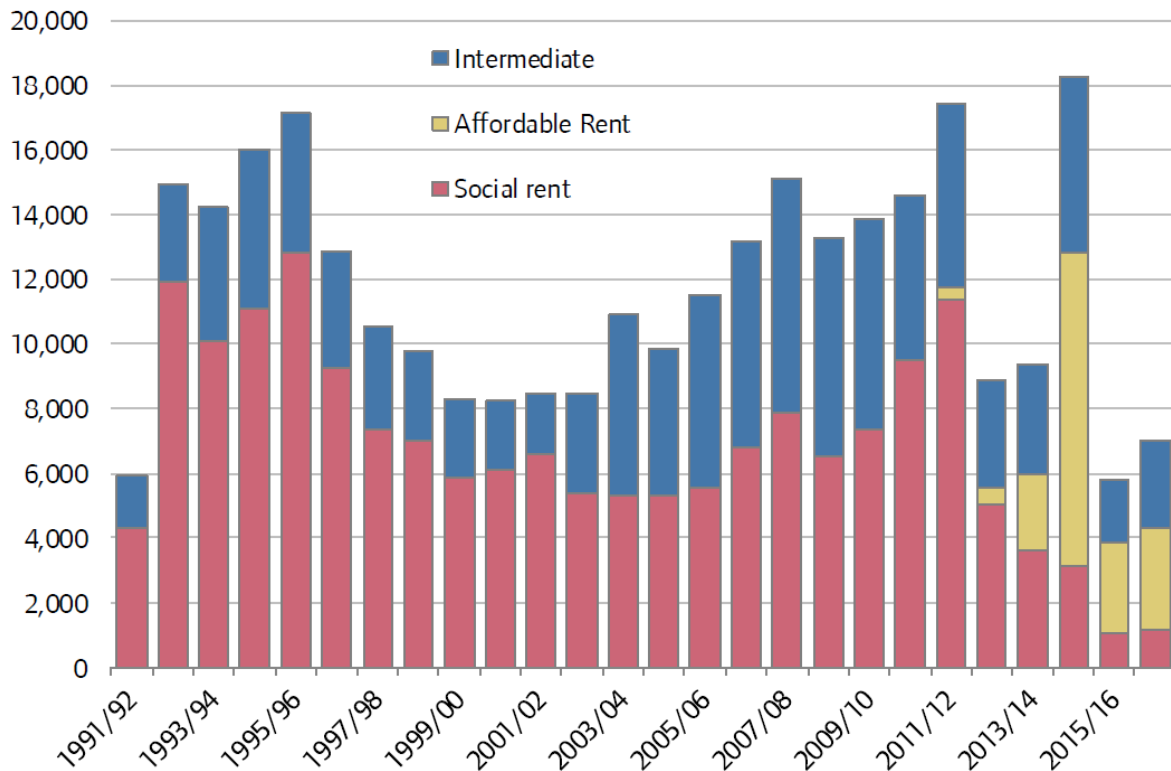
Figure 93: Total UK Residential Property Transactions, Sep 2016 – Feb 2018



Source: HM Revenue and Customs, UK Property Transactions Count: March 2018

Affordable Housing

Figure 94: Affordable housing completions in London, 1991/92 to 2016/17



Source: GLA, Housing in London: 2018

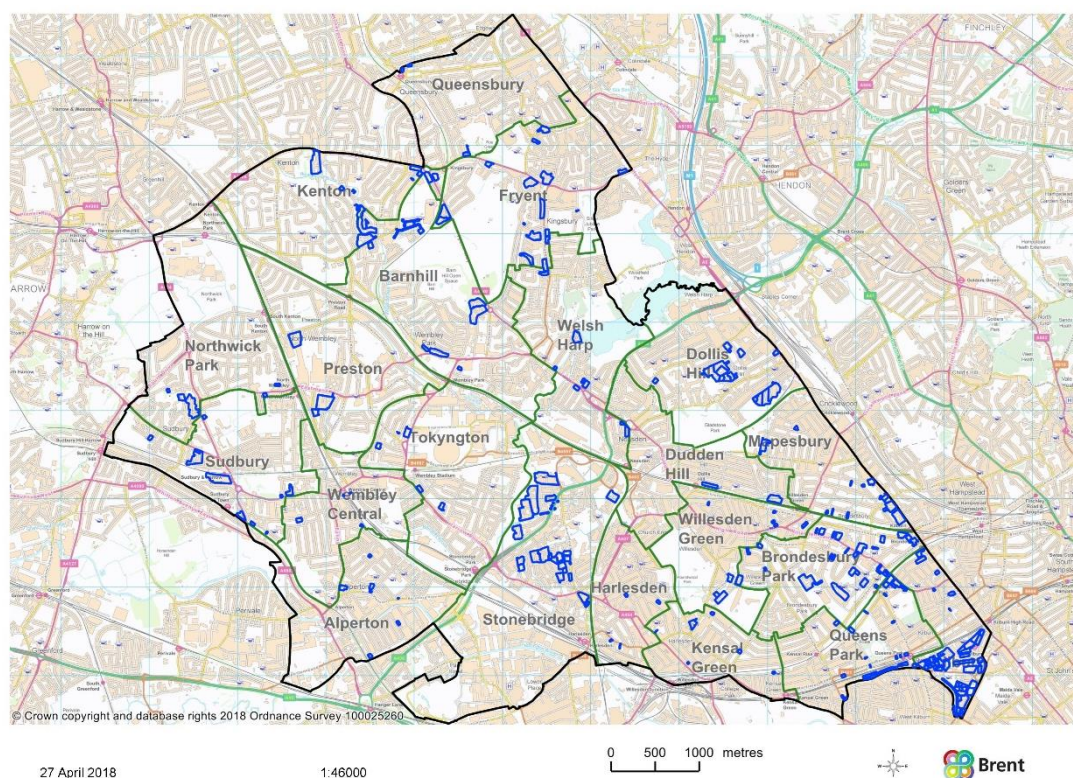
As housing prices continue to increase across London, access to housing and home ownership has become limited to many of its residents. For this reason, there is continued pressure on government and Local Authorities to provide accessible and affordable housing.

In 2016/17 there was a 20% increase in affordable homes completed compared to 2015/16 (a 25 year low in affordable housing delivery) (Figure 94)¹⁷².

Brent Council Housing Stock

Brent Council's managed housing stock consists of 11,509 homes as of March 2019, comprised of 7,764 council rented properties and 3,745 Leasehold properties. Most of the housing stock is located in the south-east region of the borough and is comprised of flats on small and medium-sized estates (Figure 95).

Figure 95: Housing Estates in Brent



Source: GIS, Brent Council: 2018

Brent Council acts as a landlord under tenancy and leasehold agreements, its main responsibility is to provide housing and management services. The Council's relationship with its tenants and leaseholders is therefore a different one from that with other borough residents, as it is primarily a contractual one under which these households pay rent or service charges in exchange for specific services. From April 2002 until October 2017, Brent Council delegated these responsibilities to Brent Housing Partnership (BHP). A review of the Council Housing Management options came to the decision to bring the management of council properties back in house.

Average occupancy for tenanted and leasehold properties is 3.3 and 4.8 persons respectively, with the latter in part reflecting the extent of private letting of leasehold properties, giving a total of around 43,000 residents or over 1 in 8 of Brent's population. Around a third of tenants

¹⁷² Housing in London 2018

are over 60 years old. 4% of tenants have a disability and 8% have a vulnerability. There is a marked difference between the balance of lettings available and the profile of demand by bed-size. A third of Council stock constitutes bedsit and 1-bed units and make up over half of all lettings, but under a third of demand. The demand for 3 and 4-bed units, however, is double the available lettings¹⁷³.

Estate Regeneration & Council Housebuilding Programme

Like many Local Authorities, Brent Council transferred larger and declining estates including Chalkhill, Church End and Stonebridge to Registered Providers in order to access government funding for their regeneration over the 1990s and 2000s, and has more recently done the same with Barham Park.

The 1960s South Kilburn Estate is the Council's largest remaining housing estate and is around halfway through a 20-year regeneration programme. Regeneration is transforming the area into a more sustainable and mixed use neighbourhood; increasing the number of homes from 1,200 to at least 2,400, and providing new supporting infrastructure and public realm. Brent Council is also considering options for St Raphael's Estate for either refurbishment with limited new build or comprehensive redevelopment.

Community consultation, engagement, involvement and buy-in at all stages is fundamental to any successful regeneration programme. The Greater London Authority (GLA) has published guidance on Council-led estate regeneration which emphasises the central importance of communities¹⁷⁴.

Brent Council committed in 2019 to deliver 1,000 new council homes over the next 5 years, with the Council investing £200m alongside £65m in funding from the Mayor of London's Homes for Londoners programme. Priorities under the programme include delivering New Accommodation for Independent Living (NAIL), homes for temporary accommodation, and larger family homes.

Registered Provider Housing Stock

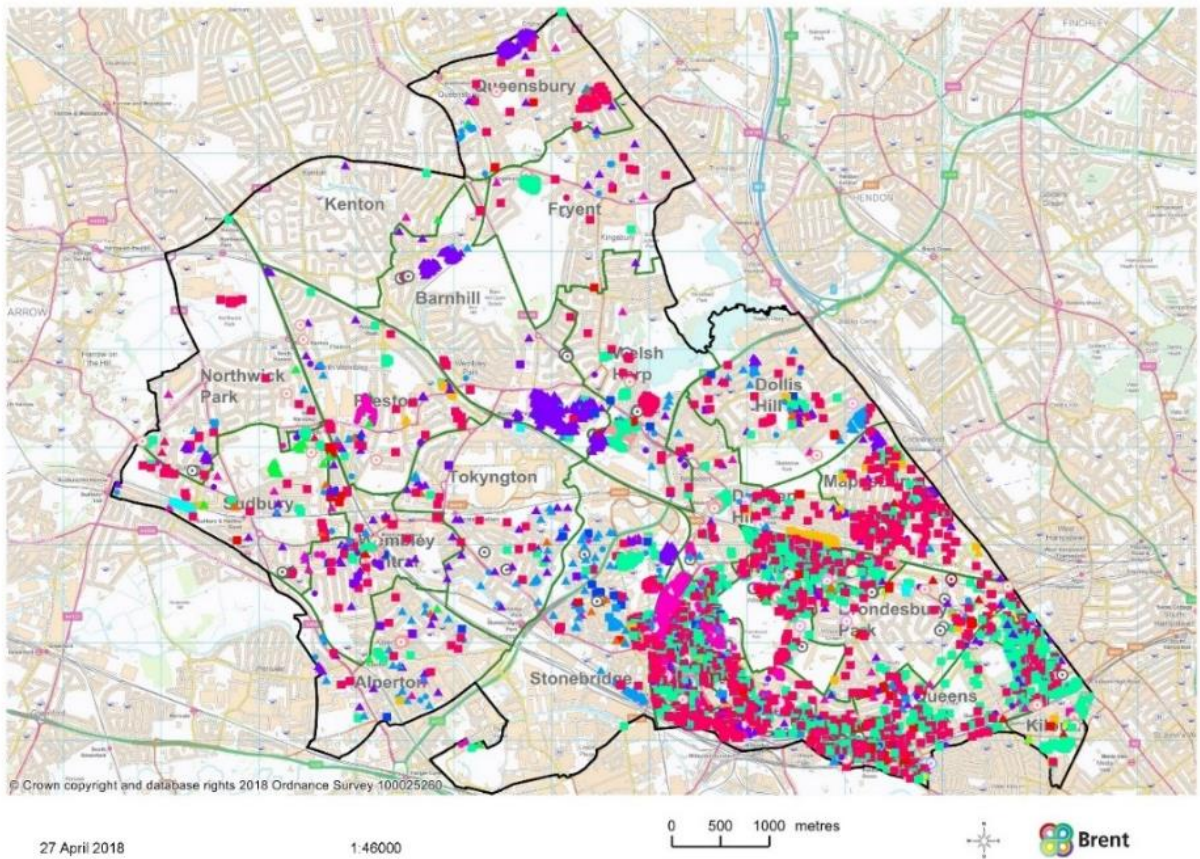
In 2018, there were 55 Registered Providers (RP) operating in the borough, managing approximately 20,221 affordable homes to rent, to which the Council has nomination rights and can discharge its statutory housing duties¹⁷⁵. The number of active RPs in Brent regularly varies, either because new players move into the borough or, more commonly, because of mergers. Of the 55 RPs, 25 are classed as small (less than 1,000 properties owned) and 30 large (more than 1,000 properties owned). Around 92% of affordable rent properties are managed by large RPs. Registered Providers stock is concentrated in the south of the borough, predominantly in areas with the highest levels of deprivation such as Harlesden, Kensal Green and Willesden Green. Registered Providers have strategic importance in Brent as a key asset to supplying required social housing properties. Since 1997 Registered Provider stock has increased by approximately 109%, a faster rate than London, having increased by circa 100% during the same period (Figure 96).

¹⁷³ Draft HRA

¹⁷⁴ Greater London Authority (2019) Better homes for local people – The Mayor's Good Practice Guide to Estate Regeneration

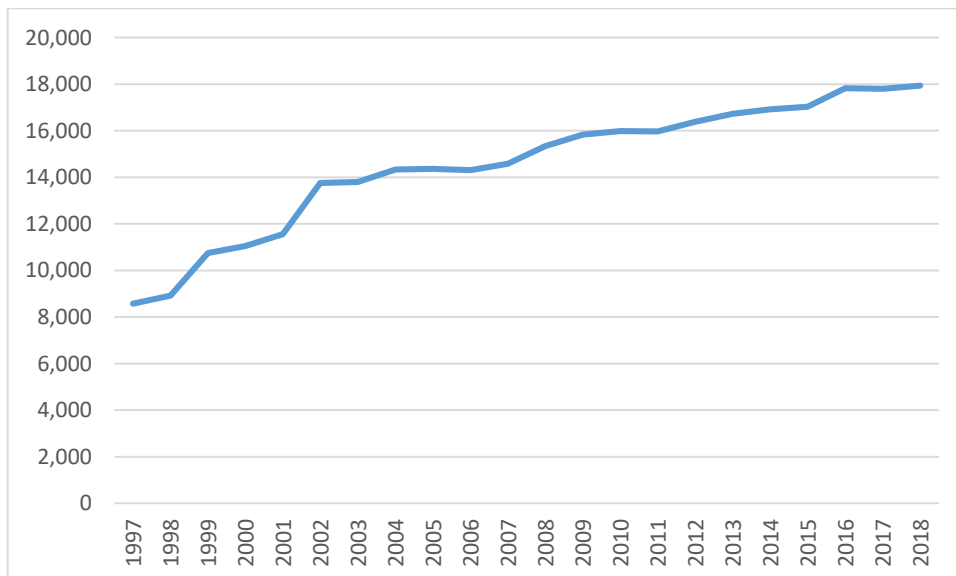
¹⁷⁵ Brent Council (2019) Brent Based Registered Providers delivery of social housing *Brent Council*: London

Figure 96: Distribution of Registered Social Housing Providers in Brent



Source: GIS, Brent Council: 2018

Figure 97: Registered Social Landlord Housing Stock, Brent, 1997 – 2018



Source: Ministry of Housing, Communities and Local Government, Table 115: Jan 2019

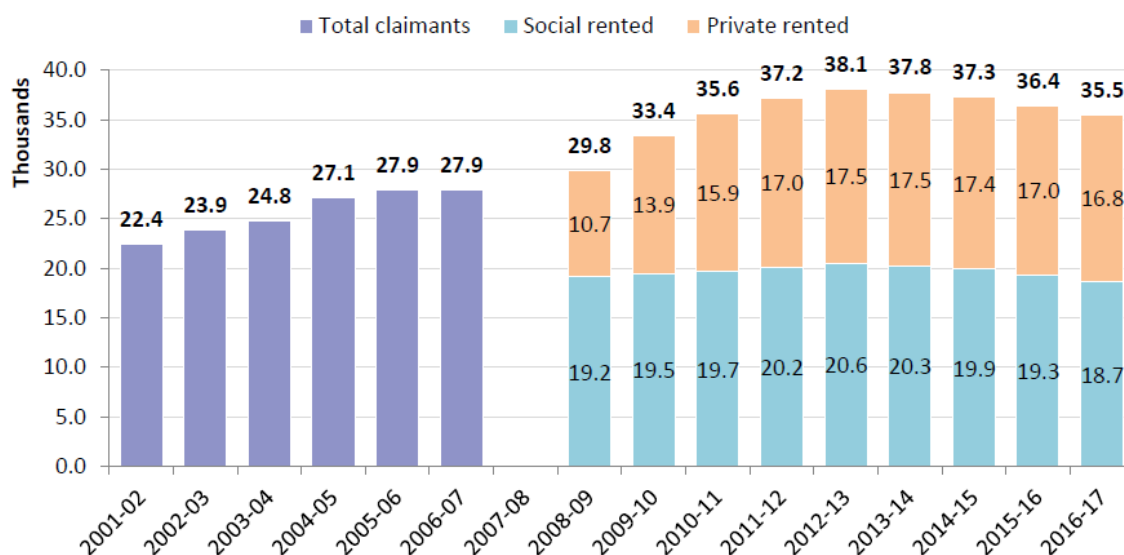
Demand Management

One of the most fundamental issues and the biggest responsibility of the council relies on its ability to manage the housing stock, especially of individuals living in social housing and residents in housing need. Problems of affordability in the private sale and rental markets continue to worsen and, in the case of the latter, have been compounded by welfare reform and restrictions on Housing Benefit. Homelessness applications and acceptances have grown across London, with a particular growth in evictions from the private rented sector (PRS)¹⁷⁶. The growth of the PRS, while making an important contribution to meeting housing demand, is concurrently a source of demand pressure, through evictions and service pressures, as the council responds to the need to raise standards and improve management. Moreover, there continues to be a growing need for specialist housing for individuals aged 65 years and over. These issues will be considered below.

Housing Benefit

The number of housing benefit claimants in Brent reached its peak in 2012-13 at 38,099 (Figure 98), as of March 2018 this number is 34,488, around a 9.5% reduction. Whilst the average annual growth from 2001-02 to 2006-07 was 1,100 families, from 2006-07 onwards this increased around 1,700 families each year on average¹⁷⁷. The increase in this period in housing benefit claimants, in particular those living in private rented housing, coincides with the increases observed on the housing register in Brent. It is likely that many households applying for housing benefit would have also registered their interest in affordable housing.

Figure 98: Number of claimants in receipt of housing benefit in Brent by tenure, DWP



Source: Department for Work and Pensions from London Borough of Brent SHMA: 2018

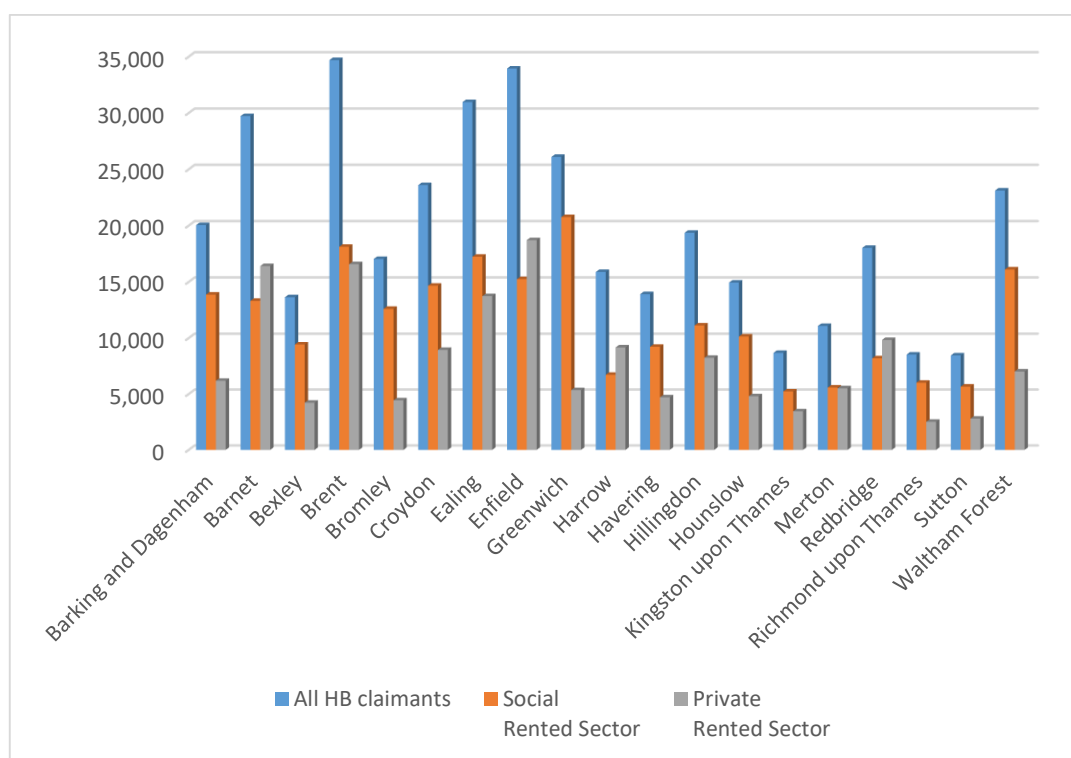
¹⁷⁶ Brent Council (2016) Scrutiny Committee: Housing Pressures in Brent, London: Brent Council

¹⁷⁷ Opinion Research Services (2018) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London: s.n.

The information relating to tenure of housing benefit claimants improved in 2008-09. It is clear to see that whilst the large majority of claimants are in social rented accommodation, there has been a rapid increase in the number of benefit claimants in PRS. The number of claimants in social rented housing increased from around 19,200 to 20,600 over the period 2008-09 to 2012-13 – a 7% increase per annum; in contrast the number of claimants in private rented accommodation increased from 10,700 to 17,500 in the same period – a 65% increase per annum¹⁷⁸.

As of February 2018, 18,118 housing benefit claimants were in social rented accommodation in comparison to 16,572 in private rented sector. Brent has the highest number of housing benefit claimants in all of the outer London Boroughs, and has the 2nd highest number of housing benefit claimants in social rented accommodation (Figure 99).

Figure 99: Outer London Borough comparison of Housing Benefit claimants by tenure, February 2018



Source: Department for Work and Pensions, Table 2 Housing Benefit claimants by Local Authority by Tenure: May 2018

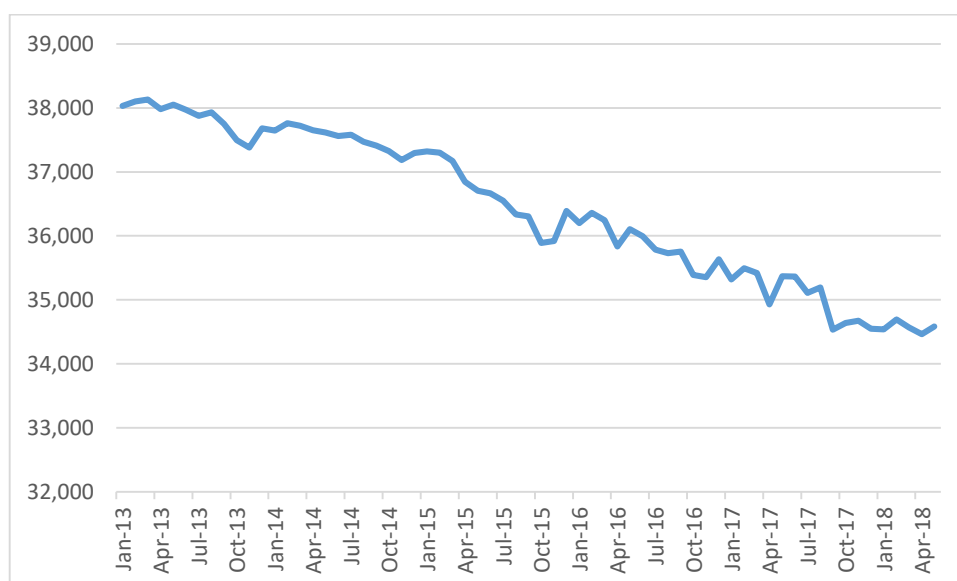
The number of housing benefit claimants has continued to decline from the peak in 2013, to May 2018 – now being around 34,581 (Figure 100). What the number of housing benefit claimants does not show is the number of individuals in affordable accommodation who are not in receipt of housing benefit but cannot afford market rents and therefore have an unmet need for affordable housing. The Strategic Housing Market Assessment (SHMA) outlines individuals who have an unmet need for affordable housing include those who are suffering from homelessness, those who are in temporary accommodation, and those who are in the reasonable preference category on the housing register. In total the 2018 SHMA for Brent identifies there is currently 6,212 households that are in affordable housing need that are unable to afford their own housing¹⁷⁹. Further detail on individuals suffering from

¹⁷⁸ Ibid

¹⁷⁹ Ibid

homelessness, individuals in Temporary Accommodation and overcrowding in Brent considered below.

Figure 100: Number of claimants in receipt of housing benefit in Brent, Jan 2013 – May 18



Source: Department for Work and Pensions, Housing Benefit Claimants Table 1 Jan 13 – May 2018: August 2018

Homelessness

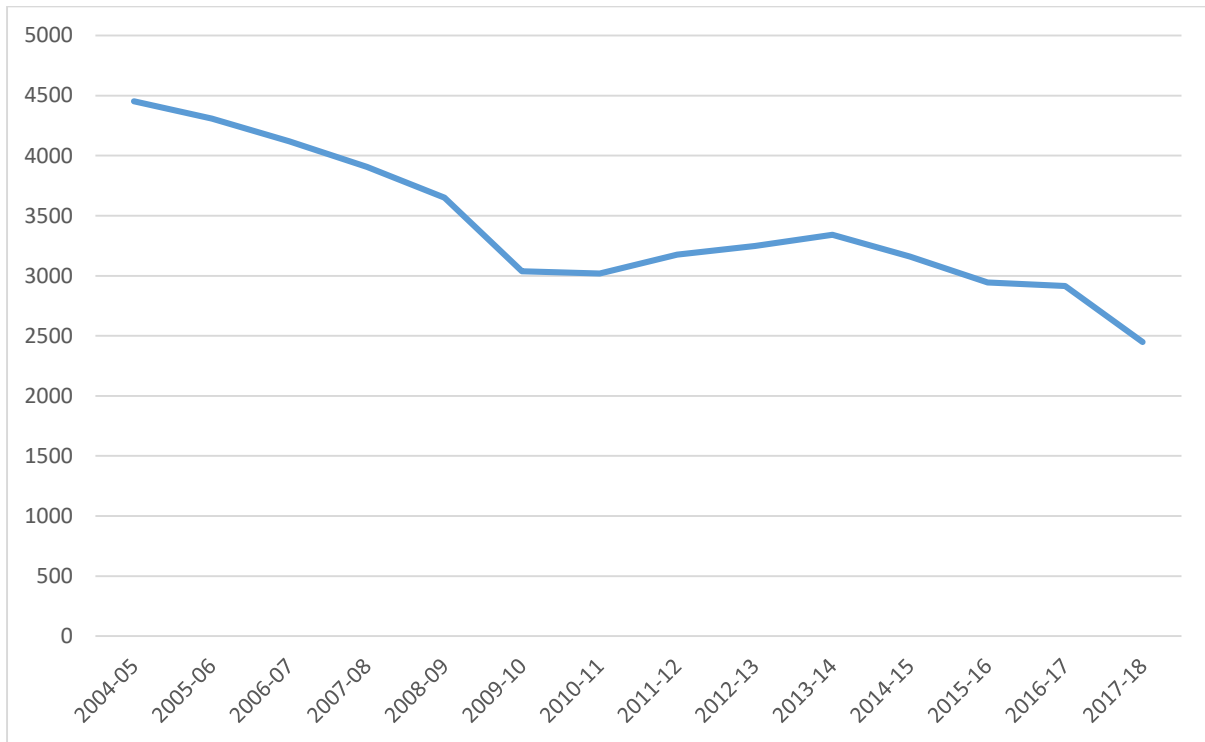
The failure to provide new housing supply across all tenures has exacerbated affordability problems in the private sale and rental markets. Structural factors like welfare reforms and lack of affordable housing contribute to households becoming, or being considered, homeless. There are also a number of personal causes such as poor physical and mental health or family breakdown. The legal definition of homelessness does not just incorporate individuals who are sleeping rough but also those who are at risk of losing their home or those who are at risk of violence and cannot continue to live in their current resident amongst other reasons. Brent's Housing Register monitors local housing need and all applicants seeking social housing in Brent must apply through its Housing Register. As of 1st April 2019, 3,161 households are in Bands A-C on the Housing Register, those considered to be in housing need. In the period from April 2015 to April 2019 there has been an average reduction of 8.3% year on year, with a 29% total reduction. Of those currently on the housing register the majority (around 70%) are accepted as homeless with overcrowding and requiring elderly specialist accommodation the next most common causes, around 9% each.

Temporary Accommodation

Brent has had one of the largest temporary accommodation portfolios in the country for many years. At its peak, Brent had almost 1 in 25 households living in temporary accommodation¹⁸⁰. Nevertheless, there has been downward trend in the number of households in TA. In 2004/05, 4,453 households were in some form of TA, by 2010/11 this had reduced to 3,019 households, and in 2019 at its lowest at 2,191 – a total reduction of around 50.3% over the 15-year period (Figure 101 & Figure 102).

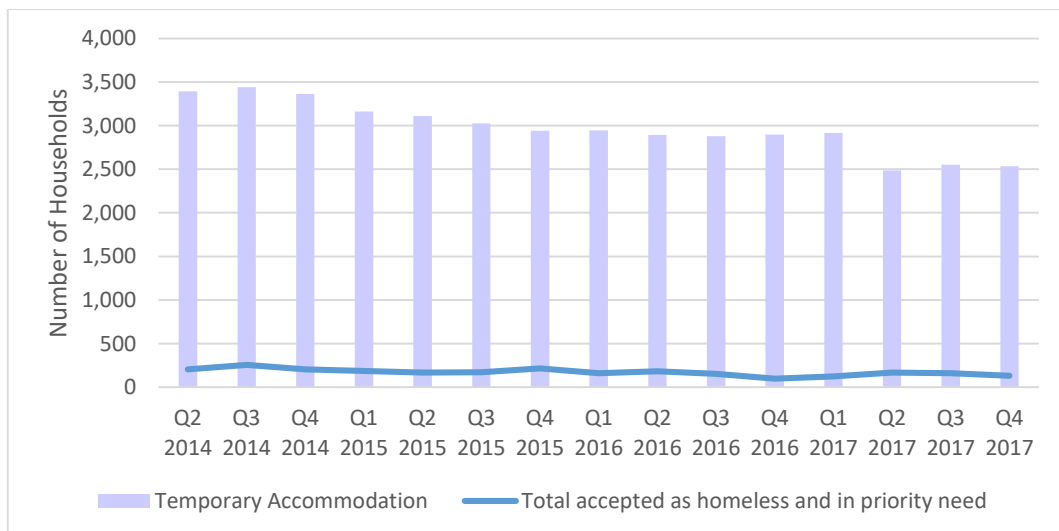
¹⁸⁰ Local Government Association (2017) Council innovation and learning in: Housing our Homeless Households, London: Local Government Association

Figure 101: Number of households in Temporary Accommodation, 2004/05 – 2017/18



Source: MHCLG Dec 2018. Live Table 784: Local Authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

Figure 102: Number of households in Temporary Accommodation and Total Accepted as homeless and in priority need by quarter, 2014 – 2017



Source: MHCLG 2018. Live Table 792a: Local Authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

Securing Temporary Accommodation has become much harder in recent years across London and in Brent there was rise in the use of B&B accommodation to a maximum of 285

households in October 2014, as well as self-contained hotel annexes and self-contained nightly paid private rented units¹⁸¹. Since then Brent has been successful in reducing the number of households in B&B and other unsuitable and high cost TA accommodation with only 51 households in B&B in March 2018. Whilst this number has now increased to just under 100, it goes against the wider London trend and the majority of households are residing in leased accommodation from private landlords. Brent has reduced the number of households in B&B TA and others through retaining one of the highest numbers of housing association leased properties of any council in England and maintaining a good relationship with housing associations such as Genesis, Network and Shepherds Bush that manage these properties; and devoting 80% of social lettings to homeless households in TA¹⁸²¹⁸³.

Brent Council is committed to reducing the overall number of households in TA and the 2016 Temporary Accommodation Reform Plan introduced a programme called 'Find Your Home', which was launched in August 2016, to prevent homelessness and thus the need for TA by intervening early when households are threatened with homelessness. The Housing Options team provide information and resources to affected households so they can access affordable PRS accommodation within the borough. The 'Find Your Home' makes use of the power provided by The Localism Act 2011 by making an offer of suitable accommodation in the PRS to end the homelessness duty, thus breaking the link between homelessness and direct access to social housing¹⁸⁴. The 'Find Your Home' programme is for those threatened with homelessness and helps households identify a suitable property that is affordable in line with households benefit income and Local Housing Allowance (LHA) rent. In 2016-17, 415 households were prevented from becoming homeless, 296 of which were attributable to the 'Find Your Home Programme', by Q3 2017-18 this had increased to 943 and 517 households respectively¹⁸⁵. A major barrier to the success of the programme is the affordability of accommodation, due to the average market rent in Brent being significantly higher than the Local Housing Allowance rate combined with the Government's Welfare Reform that caps the total amount of benefits a single or two parent family can receive at £442 p/w, which reduces the housing benefit entitlement received.

Another measure introduced in the TA Reform Plan was for the council to acquire a large portfolio of Private Rented Sector (PRS) accommodation, which would be professionally managed and in which costs could be protected against rental inflation¹⁸⁶. i4B Holdings Limited was created in 2016 to facilitate the delivery of the options within TA Reform Plan as an 'arm's length' company for Brent Council. i4B Holdings Limited was set up with an initial loan of £1 million to meet the working capital required for the company. In November 2016, £100m was agreed by Cabinet to fund the acquisition and subsequent management of a target portfolio of 300 properties in and around Brent¹⁸⁷. In 2017, Cabinet agreed i4B would provide services to the Council up to 2021 for a contract value of £2.3 million. As of 2 January 2018, i4B had 251 properties in the pipeline, either wholly purchased (86), in conveyancing (84) or approved by the PRS panel and under negotiation (81). Further investment of £116 million was made available to i4B in February 2018 to secure 300 additional private rented sector properties by 2021 as well as an additional £35m made available to fund the acquisition of 100 intermediate rent sector properties¹⁸⁸. As of January 2019, the pace of acquisitions has been slower than

¹⁸¹ Ibid

¹⁸² Local Government Association (2017) *Council innovation and learning in: Housing our Homeless Households*, London: Local Government Association

¹⁸³ Brent Council (2016) *Temporary Accommodation Reform Plan Annexe 1*, London: Brent Council

¹⁸⁴ Brent Council (2018) *Housing Scrutiny Committee: Find Your Home Progress Report*, London: Brent Council

¹⁸⁵ Ibid

¹⁸⁶ Brent Council (2016) *Temporary Accommodation Reform Plan Annexe 1*, London: Brent Council

¹⁸⁷ Brent Council (2018) *Cabinet Report: i4B Business Plan 2018/19*, London: Brent Council

¹⁸⁸ i4B Holdings Ltd (2018) *Business Plan 2018/19 and forward investment proposals 2018-2023*, London: i4B Holdings Ltd

anticipated with a total of 201 units purchase, 116 of which are within Brent. There are an additional 61 properties in the pipeline or in conveyancing or final authority stage.

Overcrowding

In the 10-year period between 2001 and 2011 Census, overcrowding increased substantially. In Brent, there was an increase of 8,745 overcrowded units, from 23,943 to 32,688¹⁸⁹.

Figure 103: Proportion of overcrowded households 2011 for Brent 2001-2011

	Occupancy rating (rooms)						Occupancy rating (bedrooms)	
	2001		2011		Net change		2011	
	N	%	N	%	N	%	N	%
Brent								
Owned	7,527	13.5%	6,324	12.9%	-1,203	-4%	4,588	9.4%
Private rented	8,134	40.3%	16,642	47.9%	+8,508	+19%	9,778	28.2%
Social rented	8,282	34.7%	9,722	36.6%	+1,440	+5%	5,152	19.4%
All Households	23,943	23.9%	32,688	29.6%	+8,745	+24%	19,518	17.7%
All Households								
ENGLAND	-	7.1%	-	8.7%	-	+23%	-	4.6%
Greater London	-	17.3%	-	21.7%	-	+25%	-	11.3%

Source: UK Census of Population, LBB SHMA 2018

Over this 10-year period, when considered by tenure, overcrowding has decreased by 1,203 households in the owner occupied sector, increased by 1,440 households in the social rented sector, with the largest increase in the private rented sector, from 8,134 to 16,642, a growth of 8,508 households. (Figure 103). The percentage of overcrowded households in the private rented sector has also had the biggest increase from 40.3% to 47.9%. The number of sharing households increased from 1,151 to 1,471 over the 10-year period 2001-11 an increase of 320 households (28%).

Under-Occupation

Brent Council runs an Under-Occupation scheme designed to help council tenants who are under occupying their property to transfer to a smaller home, in order to provide more suitable accommodation to tenants with larger families and make more efficient use of the existing housing stock. Financial incentives are offered to under-occupiers within Brent, as well as support with moving. There are also opportunities to use new developments to provide bespoke solutions to persuade existing under-occupying tenants to move.

¹⁸⁹ Brent Council (2013) *Brent 2011 Census Profile*, London: Brent Council

From October 2018 – October 2019, 31 households were successfully rehoused into smaller properties under the scheme; predominantly freeing up 3-bedroom properties and helping to meeting Brent's increased demand for family-sized accommodation. Moving forward, as part of Brent's Council Housebuilding Programme, a number of new build properties are being developed and ringfenced for under-occupiers.

Rough Sleepers

From 2010 to 2018 rough sleeping in England increased by 165% and is most severe in London. Welfare reforms to housing benefit and local housing allowance have been said to contribute to the rise in the number of rough sleepers amongst an increase in the number of non-UK nationals who are unable to access benefits¹⁹⁰. The effects of rough sleeping are dangerous and damaging to both physical and mental health, moreover long periods of rough sleeping increases risks of being trapped in the streets thus becoming a target and vulnerable victim to crime, developing alcohol and drug dependency or even death. A study by Crisis in 2016 found 30% of rough sleepers had been assaulted within the last 12 months with 56% receiving some form of verbal abuse¹⁹¹.

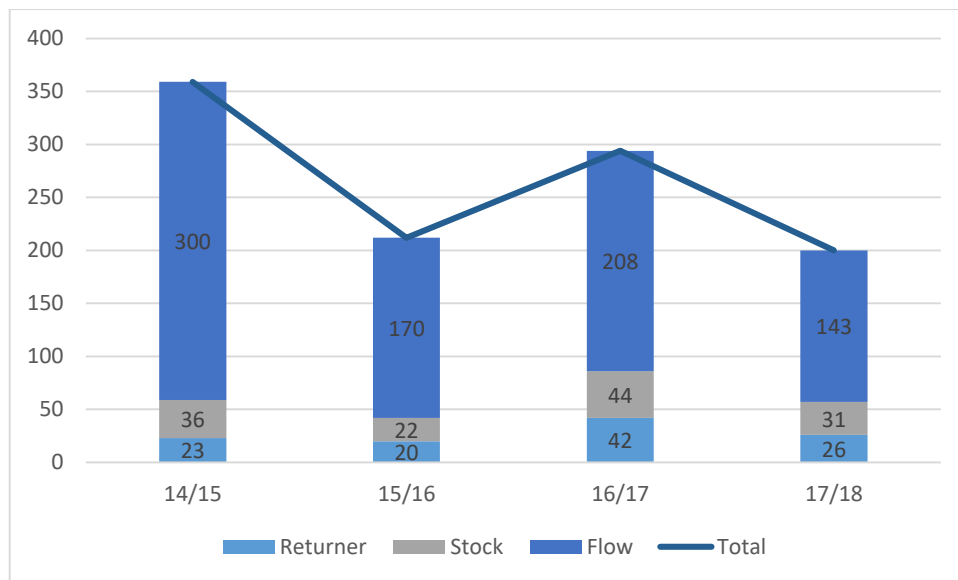
In 2017/18, 200 individuals were recorded rough sleeping in Brent. A 32% decrease on figures from 2016/17. A stark contrast to the 39% increase from 2015/16 to 2016/17 which included a 100% increase in the number of 'stock' rough sleepers (people who were also seen rough sleeping in 2015/16) and a 22% increase in the number of 'flow' rough sleepers (people who had never been seen rough sleeping prior to 2016/17). In comparison, there were reductions across all measures in the number of rough sleepers in Brent from 2016/17 to 2017/18 (Figure104). The majority of rough sleepers in Brent in 2017/18 were seen sleeping rough only on one occasion and were mainly distributed in the wards of Northwick Park and Stonebridge (Figure105)¹⁹².

¹⁹⁰ House of Commons Library (2019) *Briefing Paper: Rough Sleeping (England)*, London: House of Commons Library

¹⁹¹ Sanders, B. & Albanese, F. (2016) *'It's no life at all' Rough sleepers' experiences of violence and abuse of the streets of England and Wales*, London: Crisis

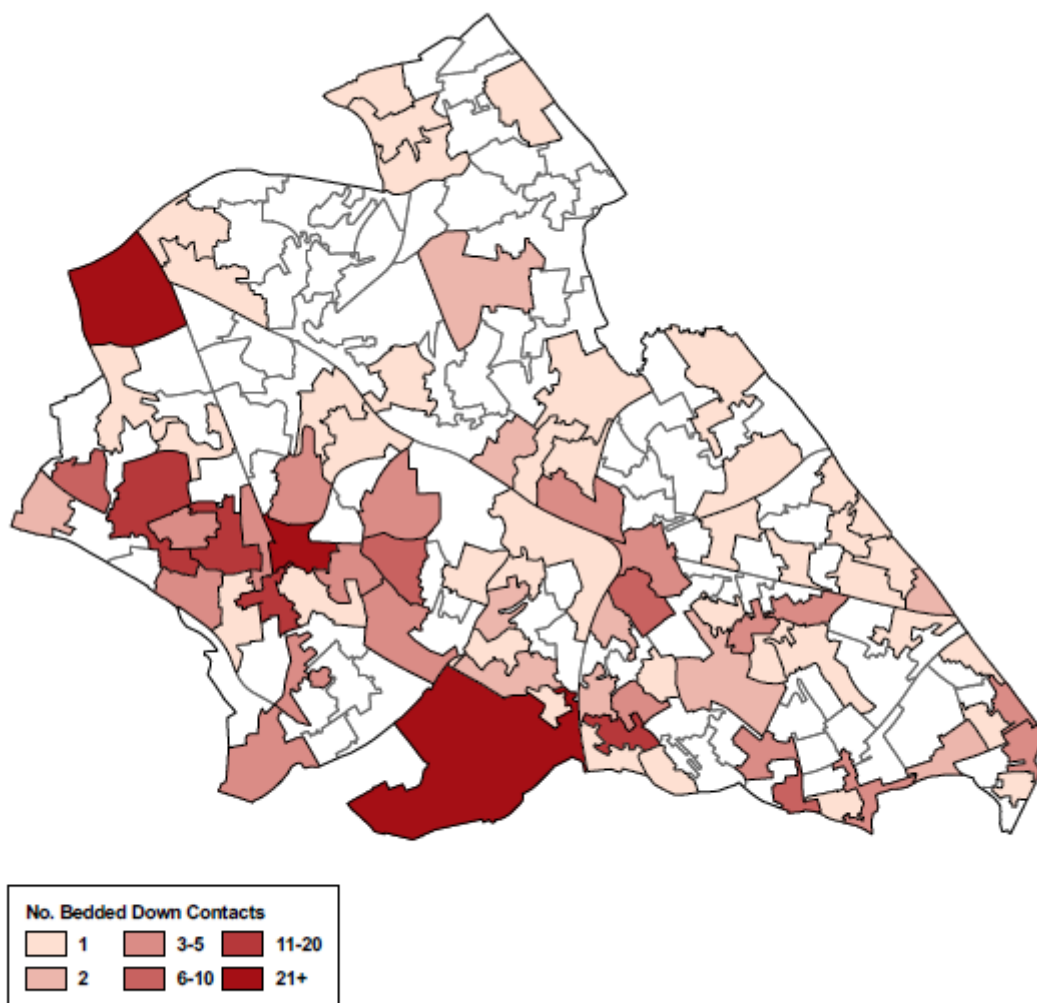
¹⁹² Greater London Authority (2017) *CHAIN Annual Report: Brent April 2016 – March 2017*, London: Greater London Authority

Figure 104: Number of people seen rough sleeping: Flow, stock, returner model, Brent 2013 2018



Source: CHAIN Annual Report – Brent Borough Profile: 2017/18

Figure 105: Bedded down street contacts by area 2017/18



In order to prevent homelessness and help rough sleepers, Brent Council is working closely with St Mungo's to deliver an outreach programme called Brent Outreach. Nonetheless, many rough sleepers are not aware of the support provided by the council.

Specialist Housing Provision

Following the 2012 report *Housing Our Ageing Population* report (HAPPI2), it was established that specialist housing units were required to accommodate the ageing population. The specialist housing requirements were modelled using the Housing LIN methodology (2012)⁴³. The Housing LIN methodology forecasts future population and then applies a benchmark need for particular housing types per thousand people aged 75+. This defines specialist provision as mainstream (including adapted and wheelchair homes), specialised housing (including Extra Care and sheltered housing), and Care Homes (including both Registered Nursing and Registered Care Homes). Brent's current Older Person Housing stock shows that there are around 1,500 units¹⁹³.

The Disabled Facilities Grant is available for adaptations to support people with disabilities to live more independently in their homes. Adaptations that can be made include installation of stair lifts, hoists, ramps, accessible showers, specialist kitchens, etc. Between 2008/09 to 2018/19, there has been a 40% increase in the total spend for Disabled Facilities Grant in Brent – from £2.92m to £4.08m – doubling the number of properties completed in the same period. In July 2018, the Council set up the discretionary Disabled Adaptation Grant under the powers of the Regulatory Reform Order that has removed the necessity of a financial assessment and improved access to the scheme.

NAIL Project

Brent is currently developing and rolling out its New Accommodation for Independent Living (NAIL) project, which aims to identify develop and acquire alternative forms of care to residential care for all vulnerable adult groups in Brent. The rationale behind NAIL is that it is preferable for elderly people to stay in their communities, rather than moving into residential care. Residential care is also very costly to the borough and the new forms of care explored in the NAIL project could be more cost-efficient, while providing for a higher quality of life, by encouraging independent living and more bespoke and personalised care packages.¹⁹⁴ In 2017, it was estimated that NAIL would provide an average weekly saving of £332 per person, compared to accommodation provided in a care setting, and more recent operational figures indicate an average saving of £250 per person.¹⁹⁵

The project uses knowledge from both Housing and Adult Social Care, with the aim of developing sustainable care plans. Whilst Adult Social Care officers have a strong understanding of the requirements of people who need accommodation and support, Housing colleagues have a stronger understanding of the regulations, processes and potential issues around building or converting accommodation, and Planning colleagues bring their expertise and input around planning processes and ensuring development is sustainable.

¹⁹³ Opinion Research Services (2016) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London: s.n.

¹⁹⁴ Brent Council (2016) *Community and Wellbeing Scrutiny Committee: Update on New Accommodation for Independent Living (NAIL) project*, London: Brent Council

¹⁹⁵ Brent Council (2017) *Cabinet Report: NAIL Programme Accommodation and Financial Mitigation Plan*, London: Brent Council

Long-term development plans are forecast to meet the NAIL Programme's long-term targets, however an increased number of short term units are required to provide a more balanced and sustainable savings profile and meet Adult Social Care's current accommodation requirements. To mitigate this, there was an acquisition of approximately 80 units (16 houses) and support on a number of leasing arrangements for the NAIL scheme this In March 2018¹⁹⁶.

Partnership Working

Brent council works with different partners such as housing associations, developers and registered providers. This is to make sure that the council gets an agreed level of nomination rights to housing association properties, monitor the cost and progress of development within the borough and to make sure in the case of housing association that they keep rents affordable by managing development costs.

Registered Providers

Registered Providers (RPs) are integral in Brent for providing both existing social housing stock, as well as delivering new affordable dwellings. Registered Providers (RPs) are the primary source of affordable housing, whether grant funded or secured through S106 agreements. Across London RPs are becoming integral to housing delivery with the GLA entering into strategic partnerships with a number of G15 RPs, with partnerships already agreed with L&Q, Genesis, Clarion, Network, Notting Hill, Optivo and Peabody – a number of which the Council has strong relationships with¹⁹⁷. Through these strategic partnerships the GLA offer favourable grant rates to associations that are willing to build at least 60% affordable housing on new developments – L&Q signed the first partnership agreement last year to build 12,000 affordable homes using £400m of GLA grant¹⁹⁸. Moreover, 55% of the £3.5 billion allocated by the GLA to deliver 90,000 units by 2021 has been given to RPs and Councils¹⁹⁹. Brent is mirroring the GLAs development of relationships with RPs with a view to capture of as much investment in housing as possible. The Council has the opportunity to attract more inward investment by developing Joint Ventures with RPs particularly if the RP is a strategic partner of the GLA²⁰⁰.

Private Developers – Volume homebuilders

The current London Plan has established the importance of partnerships with private developers in order to meet current and future housing demand²⁰¹. A core task is securing new housing of the highest quality and protecting and enhancing residential neighbourhoods. The homebuilding sector is dominated by the volume developers, with a quarter of all new homes in 2015 being built by the three largest companies (Persimmon, Taylor-Wimpey and Barratt)²⁰² and the ten largest firms accounting for 60% of all new private homes²⁰³. This

¹⁹⁶ Ibid

¹⁹⁷ Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

¹⁹⁸ Mayor of London, London Assembly (2017) Mayor strikes landmark deal for 20,000 new homes, (Published 6th April 2017) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-strikes-landmark-deal-for-20000-new-homes>

¹⁹⁹ Greater London Authority (2018) The Greater London Authority Consolidated Budget and Component Budgets for 2018-19, London: Greater London Authority

²⁰⁰ Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

²⁰¹ Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

²⁰² Department for Communities and Local Government (2017) Fixing our broke housing market, London: Department for Communities and Local Government

²⁰³ Ibid

contrasts to past trends where small builders had a much larger proportion. In 1988, small builders were responsible for 4 in 10 new build homes but have just 12% of the market share now. The increased demand for delivery of large scale housing schemes has meant building opportunities are out of reach of small building companies – from 2006 to 2016 **the average permissioned housing scheme has increased in size by 17%**²⁰⁴. The larger house builders can only (and only want to) build so much. As such the new London Plan (2017) has set targets to increase the number of small sites (less than 0.25 hectares in size) identified for development. The 10-year target for Brent is 10,230 – annualised this is 1,023 new homes. The London Plan (2017) identifies these targets will also help revive the role of small and medium-sized developers in delivering new homes in London²⁰⁵. To complement this the Mayor launched his ‘Small Sites, Small Builders’ programme in February 2018 in partnership with Transport for London (TFL). The programme aims to make small plots of publicly-owned land more accessible to London’s small and medium-sized builders with TFL bringing forward ten of its small sites for development, with capacity ranging from between 2 and 42 homes²⁰⁶.

Private Rented Sector

12% of households in London moved in the last year (including those who moved to London from elsewhere), and 72% of those moves were either into or within the private rented sector²⁰⁷. Both in Brent and across England, there has been the rise in the relative size of the private rented sector and the decline in owner occupation. In Brent, owner occupation declined from 56% to 44% between 2001 and 2011, while private rent increased from 20% to 31% in the same period. The overall balance between owners and renters has changed in 2011 compared to the position in 1981, with 54% of households in owner occupied accommodation in 1981 reducing to 44% in 2011. Furthermore, the balance between social rent and private rent has also changed: 44% of tenants rented privately in 1981 (20% out of 46%) whereas more than half rented privately in 2011 (31% out of 56%).

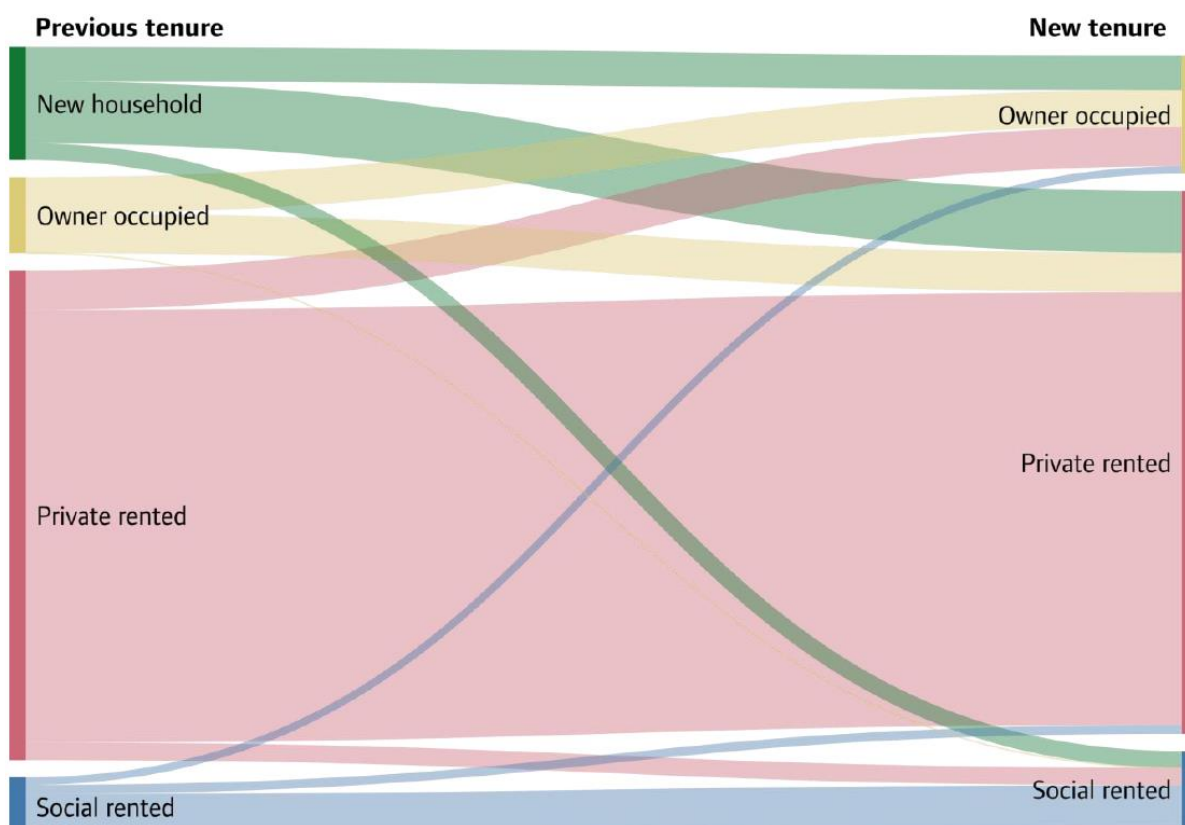
²⁰⁴ Home Builders Federation (2017) Reversing the decline of small housebuilders, London: Home Builders Federation

²⁰⁵ Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

²⁰⁶ Mayor of London, London Assembly (2018) *Mayor launches small homebuilders scheme with TFL* (Published 6th February 2018) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-launches-small-homebuilders-scheme-with-tfl>

²⁰⁷ Greater London Authority (2017) *HOUSING IN LONDON: 2017 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

Figure 106: Flows between tenures of London Households moving in the last year



Source: GLA, *Housing in London: 2018*

Examining trends of tenure mix for Brent over the last thirty years, it is evident that there have been some significant changes in the balance between owner occupiers and tenants renting their home (Figure 106).

From 1981-1991: the number of owner occupiers increased from 48,000 to 54,000 households, an increase of 12.5%. There was a less significant change in the number of private tenants, which decreased from 18,000 to 16,000. The number of tenants in social rented sector remained relatively flat at 23,000.

From 1991-2001: the number of owner occupiers continued to increase albeit at a slower pace (increasing from 54,000 to 56,000 households, an increase of 3.7%); however, this was alongside significant growth in the number of private tenants, increasing from 16,000 to 20,000 households, an increase of 25%. The number of social tenants continued to remain relatively flat increasing only marginally from 23,000 to 24,000 households.

From 2001-2011: the number of owner occupiers decreased from 56,000 to 49,000 households, a decrease of 12.5% whilst the number of private tenants continued to increase significantly, from 20,000 to 35,000 households, an increase of 75%. The number of social tenants also increased, though less significantly, from 24,000 to 27,000 households, an increase of 12.5%.

The Private Rented Sector is increasingly becoming the gateway tenure for those new to the city and encompasses individuals on a wide range of incomes. There are variations in the quality of supply of units within the private rented sector within London, and in Brent – from top quality professional lettings to illegal and unregulated beds in sheds. In April 2014, Brent Council approved the introduction of an Additional Licensing scheme, covering all Houses in

Multiple Occupation (HMOs) in the borough and in August 2014 approved the introduction of a Selective Licensing scheme, covering all private rented housing in the wards of Harlesden, Wembley Central and Willesden Green²⁰⁸. From the 1st June 2018, this extended to all privately rented properties in Dudden Hill, Kensal Green, Kilburn, Mapesbury and Queen’s Park. These measures have been introduced to reduce anti-social behaviour, deprivation and poor housing conditions in Brent. Additional benefits of introducing Additional and Selective Licensing schemes in Brent include the amplified profile of the Private Rented Sector including increased awareness of housing management and tenancy issues, the creation of a database of 2,500 licensed landlords which are deemed ‘fit and proper’ and better regulation of HMO use through closer working with planning enforcement²⁰⁹.

As of Q3 2018, Brent had the 13th highest median private rent levels in London, and the second highest median private rent levels in outer London²¹⁰. There are also variations in the concentration and distribution of renters in certain areas. The highest proportion of private renting in Brent is within Mapesbury and Willesden Green where 45% and 43% of the population privately rent respectively²¹¹. In comparison Northwick Park and Stonebridge have a much lower percentage of private renters, with just 19% and 15%, whilst maintaining a much higher level of individuals on social rent (65% in Stonebridge)²¹². This has meant there is a growing high quality segment within the sector for those able to pay mainly concentrated in the south of the borough, in comparison at the other end of the spectrum where there is prevalence of disrepair, poor management and overcrowding. These issues are reflected in the higher median rents in postcodes in more affluent or developing areas such as NW6, which are way above the borough wide Brent median (Figure 107).

Figure 107: Median Rents Variation Comparison

	<u>1 Bed</u>	<u>2 Bed</u>	<u>3 Bed</u>
<u>London (Median)</u>	£1,281	£1,500	£1,800
<u>Brent (Median)</u>	£1,250	£1,499	£1,800
<u>NW6</u>	£1,473	£1,893	£2,557
<u>HA9</u>	£1,182	£1,400	£1,650
<u>NW10</u>	£1,275	£1,556	£1,950
<u>HA0</u>	£1,100	£1,350	£1,650
<u>NW2</u>	£1,300	£1,560	£1,950
<u>NW9</u>	£1,200	£1,350	£1,675

Source: Valuation Office Agency: March 2019

²⁰⁸ Brent Council (2017) Cabinet Report: Selective licensing in the Private Rented Sector, London: Brent Council

²⁰⁹ Brent Council (2018) Cabinet Report: The impact of Landlord licensing in Brent, London: Brent Council

²¹⁰ Valuation Office Agency (2018) Summary of monthly rents recorded per 12 month rolling period: Data updated quarterly by local authority areas for England, London: Valuation Office Agency. Available at: <https://data.london.gov.uk/dataset/average-private-rents-borough>

²¹¹ Brent Council (2017) *Housing Strategy 2017-2022: Consultation Draft*, London: Brent Council.

²¹² Ibid

Wembley has become a centre for the Private Rented Sector with Quintain, in 2017, announcing plans to develop 5000 PRS homes around Wembley Stadium, becoming the largest build to rent site in the UK²¹³.

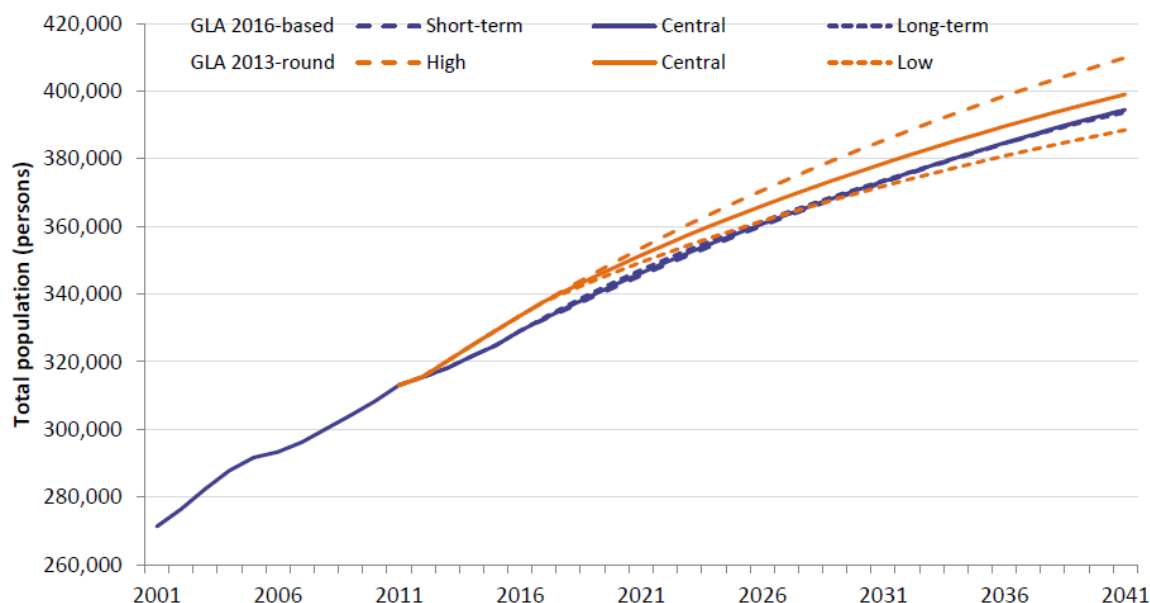
²¹³ Quintain (2017) *Wembley Park set to become the largest build to rent development site in the UK* (Published 7th February 2017)
Available at: <http://www.quintain.co.uk/news-and-media/press-releases/2017/07-02-2017>

Trends

Trend 1: Change in demographic structure and household mix

Over the next 20 years, projections show an anticipated 68% increase for the older population (65+) in Brent between 2019 and 2040. In 2019, 32% of the population in Brent are aged 0-24, compared with London's 31%²¹⁴. The central trend projections show that this age range will increase in population 7% between 2019 and 2040 in London and Brent²¹⁵.

Figure 108: GLA estimates and projections for Brent period 2001-2037



Source: ONS and GLA from London Borough of Brent SHMA: 2018

Core working age population 25-64, which is 56% of Brent's population in 2019, is projected to increase 11% by 2040 versus London's 13% increase for the same period.

Figure 109: Age range 19-24 (Young adults)

	2019	2040	2050
Brent	26,100	28,700	30,100
London	677,700	776,600	781,100

Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017

²¹⁴ GLA Population Projections - Custom Age Tables: Long trend 2017

²¹⁵ ONS (2016) 2014-Based subnational population projections for Local Authorities in England: table 2. Available at: www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/localauthoritiesinenglandtable2

Figure 110: Age range 25-64 (Core working age)

	2019	2040	2050
Brent	190,800	212,700	218,600
London	5,193,500	5,891,100	6,037,500

Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017

There will be an increase in the number of elderly people by 2040, 28% of people aged above 65 will be over 81 in Brent.

Figure 111: Age range (65-80) (older)

	2019	2040	2050
Brent	30,700	49,100	53,500
London	811,700	1,250,000	1,364,600

Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projections 2017

Figure 112: Age range (81+) (increased care needs)

	2019	2040	2050
Brent	9,800	18,900	24,500
London	265,900	490,200	639,800

*Source: GLA Population Projections - Custom Age Tables:
Housing Led Population Projections 2017*

These demographic changes will prompt the need for different housing typologies, increasing the demand for extra care, sheltered housing and leasehold schemes for the Elderly (Figure 113). Therefore, councils will need to offer alternative, specialist accommodation for individuals in greater need. This will require increased collaboration between social care and housing departments.

Figure 113: Additional Housing LIN Toolkit modelled demand for older person housing 2016 – 2041

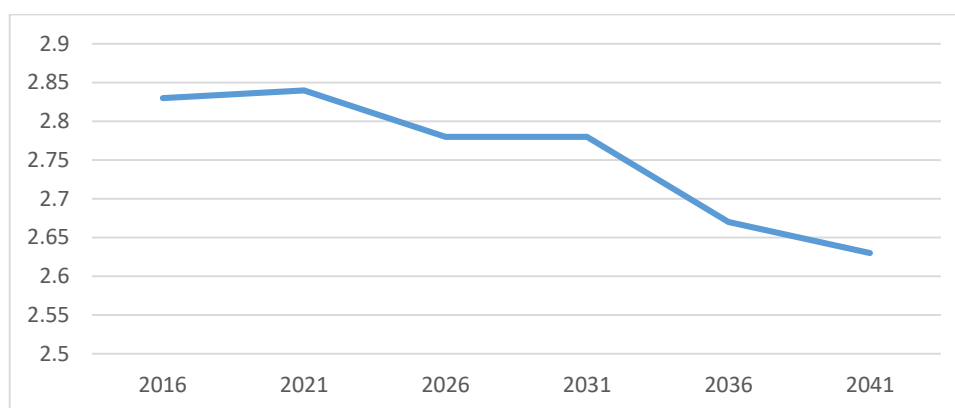
		Brent
Population aged 75+		
2016		17,300
2041		34,800
Change 2016-41		17,500
Additional Modelled Demand for Older Person Housing		
Traditional sheltered		1,000
Extra care	Owned	500
	Rented	300
Sheltered 'plus' or 'Enhanced' Sheltered	Owned	200
	Rented	200
Dementia		100
Leasehold Schemes for the Elderly (LSE)		2,100
TOTAL		4,400
<i>Percentage of Overall OAN</i>		9.2%

Source: London Borough of Brent SHMA: 2018

Despite an increase in the percentage of individuals aged 65 and above, the majority of Brent's core population will be at working age.

Whilst historic and current trends show a rise in household size in Brent (since 1991), the Office for National Statistics estimate household sizes to decrease rapidly over the 20-year period (Figure 114).

Figure 114: Brent Average Household Size, 2016-2041



Source: Office for National Statistics: 2016-based household projections for Local Authorities and higher administrative areas in England

However, evidence suggests a high need for 3-bedroom market housing and, to a lesser extent, in affordable housing. (Figure 115). This is due to high amounts overcrowding currently in a lot of affordable houses and the need to rectify this, combined with a growing trend towards multi household families in both affordable and open market housing²¹⁶.

²¹⁶ Opinion Research Services (2018) London Borough of Brent Strategic Housing Market Assessment: Report of Findings, London

Figure 115: Full objectively assessed need for housing: size and tenure mix across Brent for Long-term migration 2016-2041

	Brent	Percentage of OAN
MARKET HOUSING		
1 bedroom	3,700	7.7%
2 bedrooms	5,300	11.0%
3 bedrooms	13,500	28.1%
4 bedrooms	3,300	6.9%
5+ bedrooms	100	0.2%
Total Market Housing	25,900	54%
AFFORDABLE HOUSING		
1 bedroom	4,200	8.8%
2 bedrooms	9,000	18.8%
3 bedrooms	5,800	12.1%
4 bedrooms	2,500	5.2%
5+ bedrooms	600	1.3%
Total Affordable Housing	22,100	46%
TOTAL	48,000	100.0%

Source: London Borough of Brent SHMA: 2018

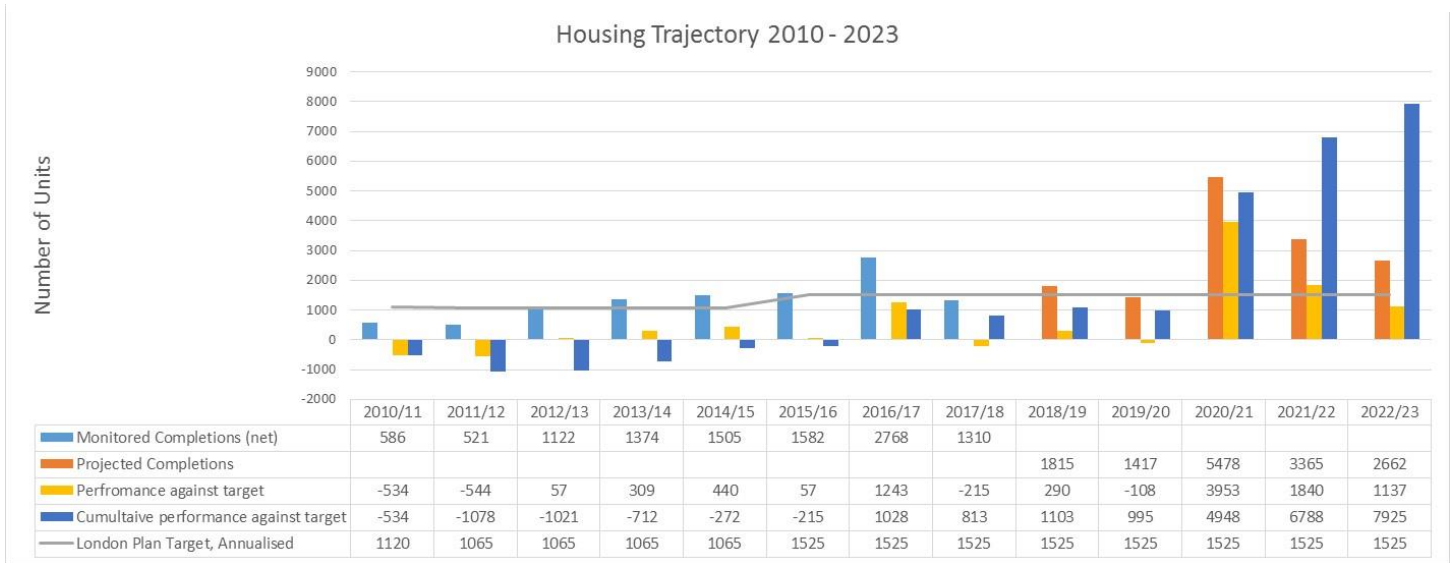
Trend 2: Worsening Supply & Demand Imbalance

Housing supply has in any case not been able to keep pace as demand has increased both in total number of dwellings and in the need for affordable homes. Brent's Local Plan Core Strategy published in 2010 set out the need for 22,000 home to be delivered between 2007 and 2026. This estimated a need of around 1,157 additional new dwellings per annum far lower than the target set in the Draft London Plan (2017). In 2017/18 there were 1,310 net additional dwellings completed in Brent, falling short against the London Plan (2016) target of 1,525 per annum²¹⁷. This contrasts to the net additional dwellings completed in 2016/17, where Brent exceeded the target by just under 50%²¹⁸.

²¹⁷ Brent Council (2018) Authority Annual Monitoring Report & Housing Trajectory 2017/18: Brent Council

²¹⁸ Brent Council (2017) Authority Annual Monitoring Report & Housing Trajectory 2016/17: Brent Council

Figure 116: Housing Trajectory 2010-2023, Brent Council 2017/18



Source: Brent Council 2017/18

The 2018 Brent SHMA identified the Full Objective Assessed Need for Housing in Brent to be 48,000 dwellings between 2016 – 2041, equivalent to an average of 1,920 additional dwellings per annum. However, The Draft London Plan (2017) sets a higher annual target for Brent of 29,150 additional dwellings to be delivered from 2019/20 to 2028/29²¹⁹ and the emerging Brent Local Plan identifies potential delivery of a minimum of 27,482 homes in the period 2019/20 – 2028/29. This is a significant increase and puts extra pressure on Local Authorities to encourage housebuilding. Whilst the comparative period differs, the per annum average target of 2,915 set out in the Draft London Plan (2017) is considerably higher than previous targets and recent delivery performance. Brent Council feels that the target is unachievable based on the over-emphasis of the potential of development on small sites, the limited availability of large sites, as well as unpredicted changes in market conditions²²⁰. Despite this, Brent Council does not anticipate the target to reduce significantly at all²²¹.

Moreover, the targets set in the Draft London Plan and the Brent Local Plan Preferred Options are far higher than historical housing delivery. The 10 year targets state London should be delivering around 66,000 additional homes per year over the next 10 year period, however from 2011 - 2016 an average of 20,000 homes have been built each year²²². To meet the targets set housing delivery would have to return to levels of the 1930s where an average of 61,500 were built per annum. Although the targets set in the Draft London Plan will not be confirmed until after the plan is adopted (scheduled for autumn 2019), the already severe supply and demand imbalance will dramatically worsen over the next 20-year period without a radical step change in delivery.

²¹⁹ Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

²²² Greater London Authority (2018) HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy, .

Affordable Housing

The Brent 2018, SHMA provides further evidence that additional affordable housing for 21,952 households is required over the period 2016-41. This is equivalent to an average of 878 households per year, which represents 52.3% of the demographic growth for Brent²²³. Over this period, the number of households in need of affordable housing will increase by 13,409, alongside an increase of 26,102 households looking for homes at market rates. This represents 33.9% of the total household growth projected based on demographic trends²²⁴. Any losses from the current stock (through demolition, clearance, or Right to Buy) would increase the number of affordable dwellings needed by an equivalent amount.

The demand for affordable housing is split between social rent, intermediate rent and shared ownership, social rent being the most prevalent in Brent. From 2014 to 2016, shared ownership had delivered additional housing for nearly 3% of the demand not met by the unassisted residential market. Also, Help to Buy has contributed an additional 8% to the sales market²²⁵. The promotion of low cost home ownership within London has continued to develop over recent years with additional help provided by the 2008 creation of the 'First Steps' programme. The 'First Steps' programme sets out an eligibility criteria predetermined by income to help individuals and families within London onto the property market. In June 2015, 27,000 homes had been delivered through the programme, which has helped around 42,000 Londoners²²⁶. Like London, the Brent 2019 SHMA sets out a need to increase the supply of affordable housing through intermediate products including shared ownership and affordable rent ²²⁷.

Social rent represents the main supply of affordable housing in Brent. Social housing stock constitutes nearly a quarter of the housing stock in the borough, the council is still the largest single owner and manager of social housing in the borough, but, the decline in local authority housebuilding and transfer of larger council housing estates in the 1990s and 2000s, means the majority of social housing is now owned and managed by Registered Providers. PWC estimates social renters will decrease to 21% of household tenures in London by 2025²²⁸.

Current planning policy in Brent requires more social rented housing to meet local needs in new affordable housing developments. A ratio of 70% social rent/London Affordable rent and 30% intermediate is required for new affordable housing development in Brent's Local Plan²²⁹. This policy option is driven by the relatively lower incomes of individuals and households in Brent. In July 2015 the GLA estimated Brent had the lowest household mean income at ward level across London, (Stonebridge, £32, 250)²³⁰. In 2018 the Office for National Statistics estimated that residents median total weekly income in Brent to be £575, the second lowest out of the 33 London Boroughs²³¹. There is a significant difference between the affordability

²²³ Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.p52

²²⁴ Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.p51

²²⁵ Savills PLC (2016) *Spotlight: Shared Ownership*, London: Savills PLC

²²⁶ London Assembly Housing Committee (2015) *First Steps on the Ladder? An appraisal of Shared Ownership in London*, London: Greater London Authority

²²⁷ Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

²²⁸ Greater London Authority (2017) *HOUSING IN LONDON: 2017 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

²²⁹ Opinion Research Services (2016) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

²³⁰ Greater London Authority (2015) *Household Income Estimates*, London: Greater London Authority. Available at: https://data.london.gov.uk/apps_and_analysis/gla-household-income-estimates/

²³¹ Annual Survey of Hours and Earnings (ASHE) (2018) *Resident based median earnings (GBP) (Hourly and Weekly), by Full time/Part time, or Gender*, London: ASHE, ONS. Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/datasets/placeofresidencebylocalauthorityashetable8>

of social rent and other affordable discounted rents to local people in Brent, such that social rented housing is required to meet local housing needs. Government capital grants for social rent housing, however, fell dramatically, by approximately 60%, under the coalition government in 2010 and has not returned to previous levels. New affordable rented housing at up to 80% of market rents (inclusive of service charges) has provided some new supply, however the Brent 2018 SHMA outlined affordable rent properties in Brent set at 80% of market rents are unaffordable to anyone other than relatively high earning households, marginalising many in the borough²³². With the introduction of the Overall Benefits Cap, the GLA and the Council have sought to cap new affordable rents at Local Housing Allowance levels.

Moreover, tenure mix of properties built in the borough is not in line with affordable housing targets. For example although in 2014/15 of the 1557 homes completed, 707 were affordable, 45% of total housing delivery; in comparison, in 2016/17 housing completion delivery decreased to 1306 additional units, with only 281 being affordable, 28% of total delivered; furthermore, in 2017/18, there was a dramatic decline in total units completed, reducing to 693 additional units, with 110 affordable – equating to 15.87%²³³. These more recent figures are less than both the 50% target by Brent and the 35% viability threshold²³⁴. Restrictions within existing legislation permits developments with less than ten units to not have any affordable obligations, also permitted development sites are limiting the percentage of affordable housing delivered in Brent to around 25%²³⁵. Brent is mirroring London in affordable delivery with the GLA finding the number of affordable homes delivered in London dropped sharply in 2015/16 to 5,790 which is the lowest figure in 25 years. In 2016/17 there was a 20% increase on this, reaching 6,960²³⁶.

Trend 3: Increasing Unaffordability

Housing demand is outweighing supply which is having a knock on effect on affordability. At the same time, the affordability of shared ownership, low cost home ownership schemes and affordable rent programmes is being questioned. In 2015, whilst the median London wage was £28,000; the median household income for new shared owners across London was £39,300 in 2013/14²³⁷. Furthermore, there is a lack of ability to purchase more of your property within shared ownership (known as 'stair casing') leading to many individuals staying at the percentage they first buy at²³⁸.

The disparity between wages and housing costs has been happening across the UK and is projected to continue. Figure 117 shows how the percentage of annual wage has been decreasing over time in comparison to the increases in House prices.

²³² Opinion Research Services (2018) *London Borough of Brent Strategic Housing Market Assessment: Report of Findings*, London: s.n.

²³³ Brent Council (2017) *Authority Annual Monitoring Report & Housing Trajectory: 2017/2018*, London: Brent Council

²³⁴ Ibid

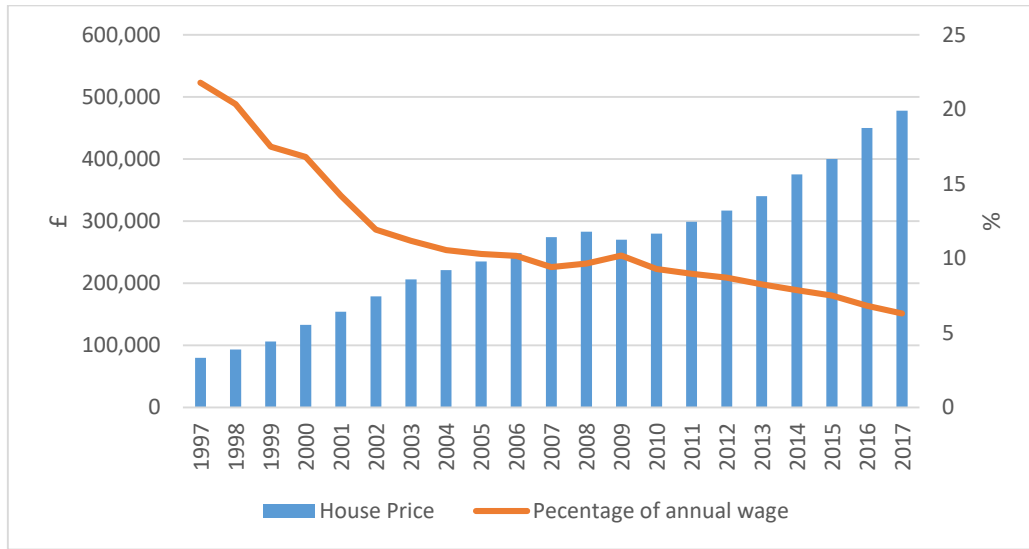
²³⁵ Brent Council (2018) *Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation*, London: Brent Council

²³⁶ Greater London Authority (2018) *HOUSING IN LONDON: 2018 The evidence base for the Mayor's Housing Strategy*, London: Greater London Authority.

²³⁷ London Assembly Housing Committee (2015) *First Steps on the Ladder? An appraisal of Shared Ownership in London*, London: Greater London Authority

²³⁸ Ibid

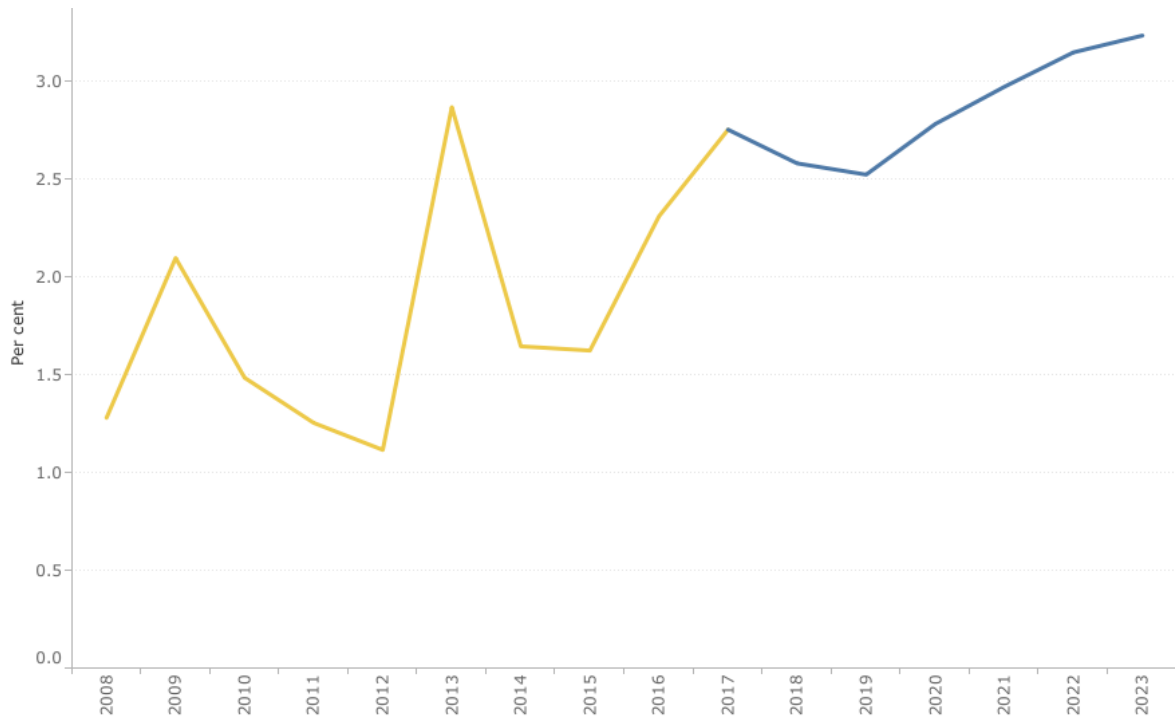
Figure 117: Changes in House Prices and % of annual wage 1997-2017



Source: ONS: Ratio of house price to workplace-based earning 1997-2017.

In relation to house prices, wages have not risen at the same rate. The median annual wage in 2017 covered 6% of the cost of a house compared to 21% in 1997. The annual wage in 2017 covered 6% of the cost of a house, compared to 21% in 1997. Forecasts show that this trend is likely to continue. Wage growth is projected to be 3.1% in 2022, in comparison rental prices will increase by 18% and house prices by 10% between 2019 and 2023.²³⁹

Figure 118: Average Earnings Growth %



Source: Office for Budget Responsibility

²³⁹ CBRE Residential (2019) *Five Year Forecasts*, London: CBRE. Available at: <https://www.cbresidential.com/uk/en-GB/content/five-year-forecasts>

There is a clear and established trend that housing costs are outstripping wages at a high rate.

One outcome of unaffordability is that Key Workers are unable to afford decent accommodation. Keyworkers are public sector employees who provide a vital frontline service in areas of health, education and community safety. A 2016 report by the London Chamber of Commerce and Industry (LCCI) found that 54% of “blue light” emergency service staff (police, ambulance staff and paramedics) now live outside London²⁴⁰.

London Councils’ research found that London senior leaders identified staff recruitment as one of the major issues facing schools in London, with 71% of London Primary school respondents stating recruiting classroom teachers is much harder, compared to 52% outside of London. Moreover, 94% of London school leaders agree that local house prices make it very difficult for teachers to continue teaching in London²⁴¹. Wage freezes in the public sector and increasing housing costs mean that this is likely to continue to be a key issue.

Social housing lettings to new tenants in England declined from 364,000 per year to 212,000 per year between 1995/6 to 2014/15²⁴². This means that an increasing number of low income households must now find a private tenancy. However increased competition for private rentals means landlords and letting agents can be more discerning about who their tenants are, favouring ‘young professionals’ who are considered ‘good tenants’. A 2016 survey of private landlords by Shelter’s found that 63% of landlords would prefer not to let to LHA claimants, with 42% operating an outright bar. Further, Shelter’s survey of private renters revealed that more than a fifth (21%) of those claiming housing benefit said they had been discriminated against because of their LHA status in the last five years²⁴³. As demand in the private sector increases, it will become harder for LHA claimants to find affordable housing in the private rented sector.

There has also been sustained increases in social rents within Brent, partly driven by the introduction of new affordable rents, from both the Council as well as Private Registered Providers (Figure 234 & 235). Whilst this increase is in line with neighbouring boroughs of Camden and Barnet, it highlights issues surrounding affordability for those at the very bottom of the housing market.

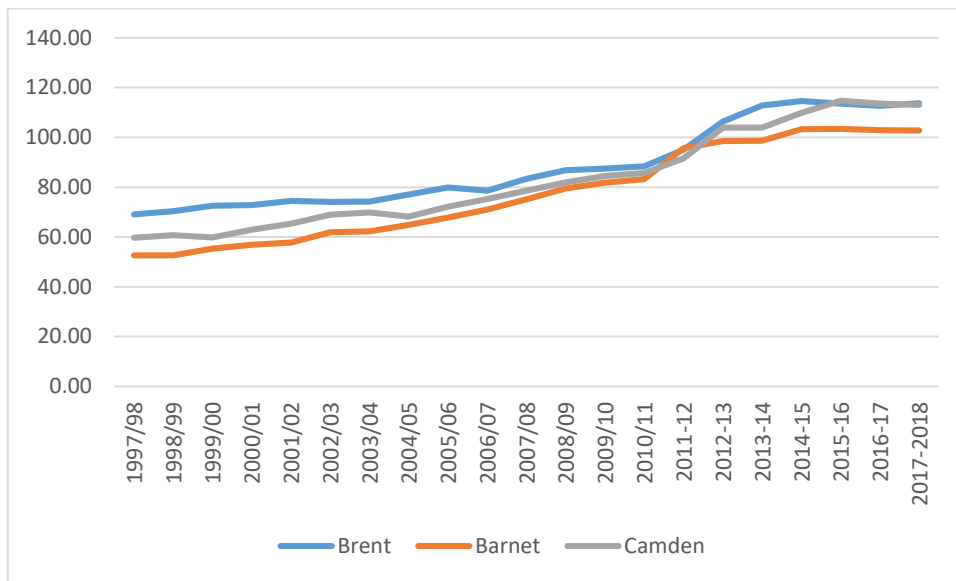
²⁴⁰ London Chamber of Commerce and Industry (2016) *Living on the edge: Housing London’s Blue Light Emergency Services*, London

²⁴¹ London Councils (2017) *Talking Heads: The views of London’s school leaders on future challenges*

²⁴² Shelter (2017) *Shut out: The barriers low income households face in private renting*, London: Shelter

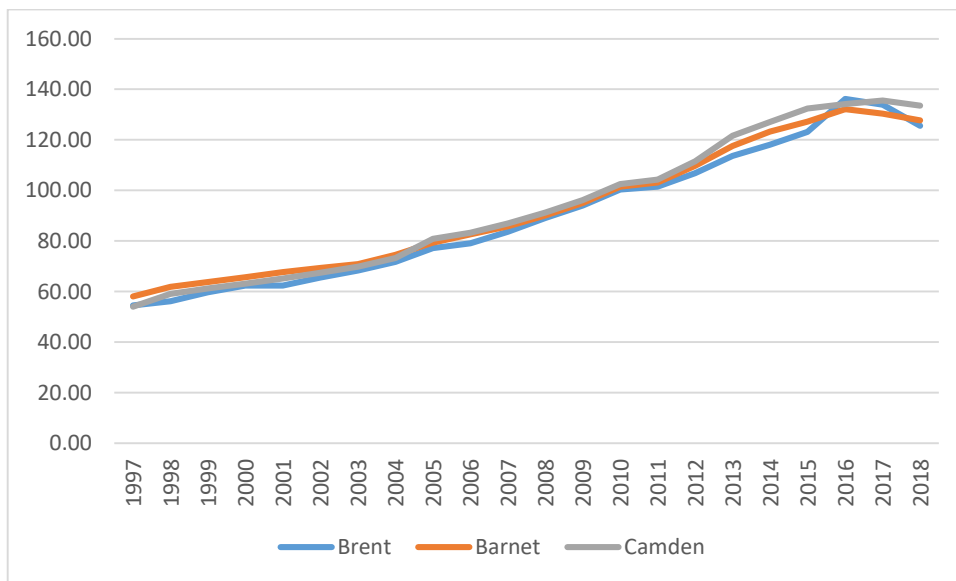
²⁴³ Shelter (2017) *Shut out: The barriers low income households face in private renting*, London: Shelter

Figure 119: Local Authority Average Weekly social rents 1997 – 2018



Source: DCLG, Table 702: January 2019

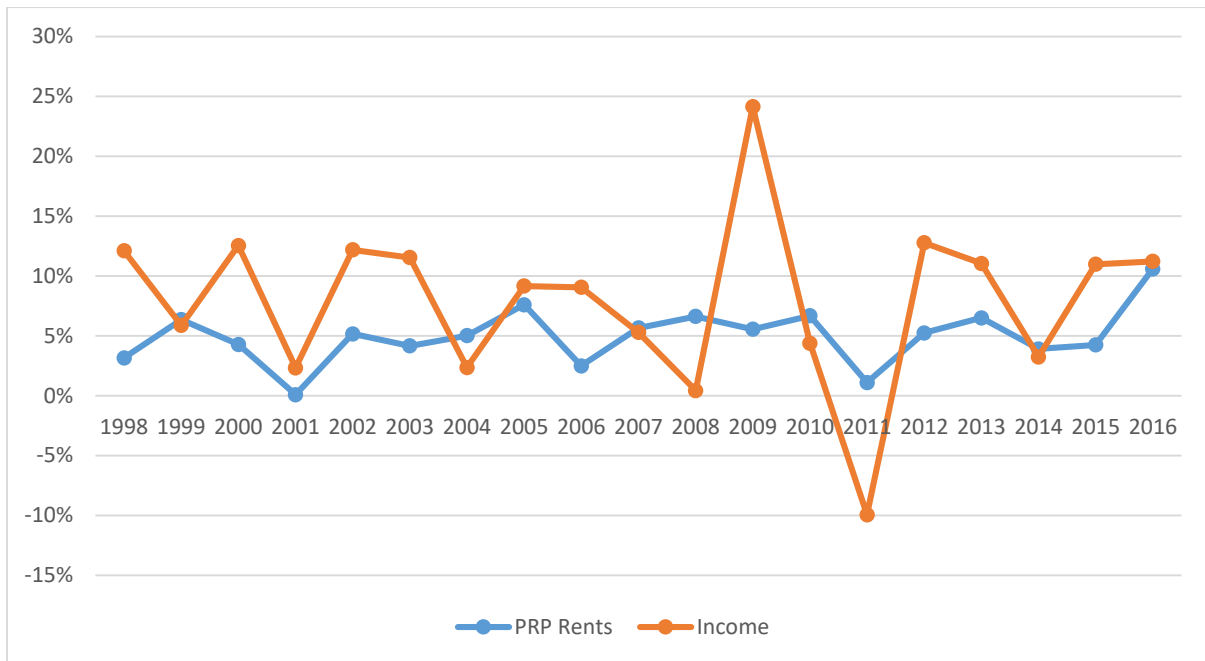
Figure 120: Registered Social Landlord weekly rents



Source: DCLG Table 704: January 2019

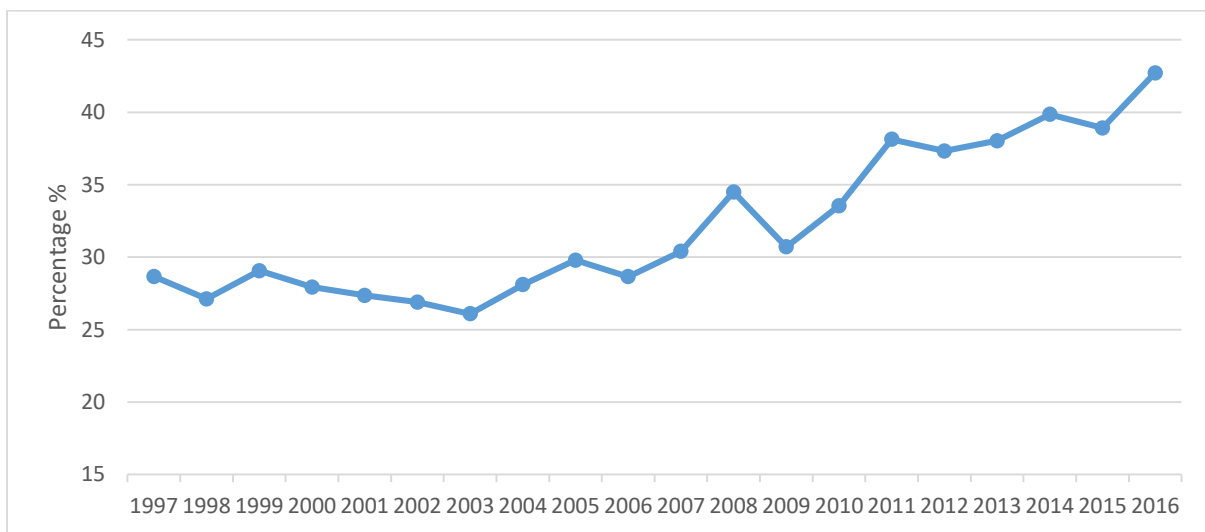
Whilst social rents have been increasing, the tenth percentile gross weekly salary in Brent (the percentile in which most individuals within socially rented properties are) has not increased at the same rate. Whilst Private Registered Provider average weekly rents have increased by circa 150% from 1997 to 2016, in the same period, gross weekly salary has increased by only 68% (Figure 121). The ONS estimates that in Brent, the average weekly social housing rent for PRP makes up 42.71% of tenth percentile gross weekly salary in Brent, an increase of around 14% from 10 years previous (Figure 122) The continued increase in social rents, combined with the lack of supply meeting demand could lead to an increase in overcrowding and reduction in quality and suitability of housing.

Figure 121: Comparative percentage change in PRP social rents to 10th percentile weekly income 1997 to 2016



Source: ONS Housing Summary Measures: 2017

Figure 122: Average weekly social housing rent for private registered providers as a percentage of tenth percentile gross weekly salary, 1997 to 2016



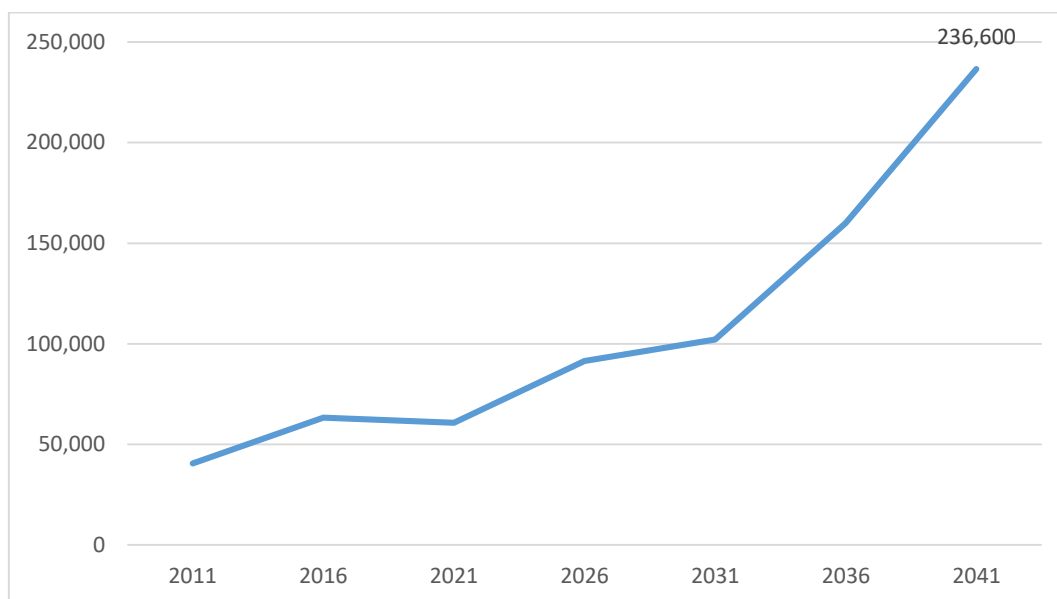
Source: ONS Housing Summary Measures: 2017

Increased homelessness is another outcome of increased unaffordability. The welfare cuts introduced in this decade, and those planned for introduction in the coming years will cumulatively reduce the incomes of poor households in and out of work by some £25 billion a year by 2020/21. Homelessness is projected to increase between now and 2041²⁴⁴. In Greater London, homeless households are projected to reach nearly a quarter of a million people by

²⁴⁴ Fitzpatrick, S., Pawson, H., Bramley, G. & Wilcox, S. (2017) *The homelessness monitor: England 2017*, London: Crisis

2041, almost 4 times the number in 2016 (Fig. 123); increasing at a faster rate than levels across England, Wales and Scotland.

Figure 123: Projection of Number of Homeless Households in Greater London



Source: Homelessness projections: Core homelessness in Great Britain 2017

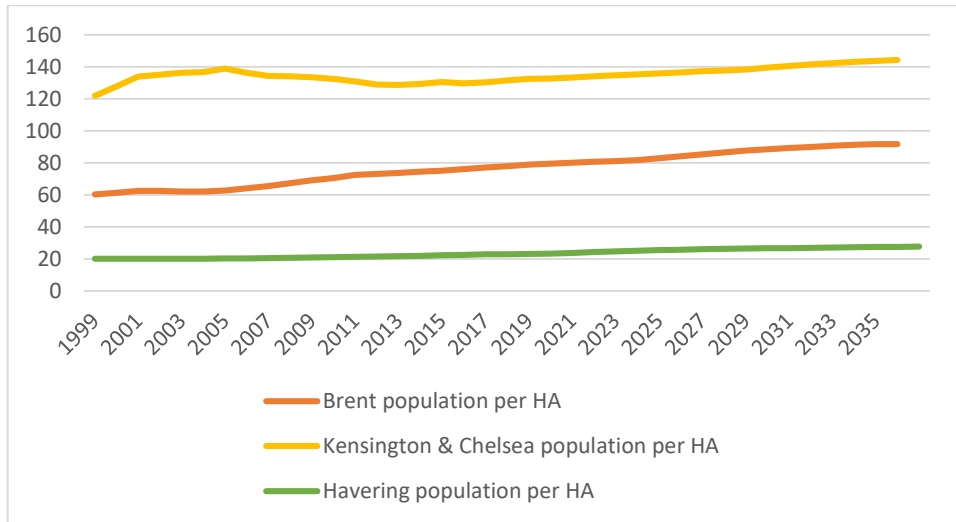
Fuel poverty (the inability to adequately heat a home) is another impact of unaffordability as it is caused by both low incomes and high costs. Fuel poverty is more common amongst ethnic minority groups with 16.4% living in fuel poverty in comparison of 10.4% of the white population in the UK in 2015. 37.6% of all fuel-poor households are in the private rental sector. In Brent, 13.1% of households experienced fuel poverty, higher than London at 10.1% and England at 11%. This is in the context of existing welfare cuts, economic trends and higher housing costs associated with the growth of private renting have already increased poverty amongst members of working families to record levels.

Trend 4: The need for increased densification

Given London's scarce land supply and competing demands for land use, including demand for new homes to accommodate London's growing population, it is vital that higher density is achieved. The ONS anticipate population per HA in Brent to increase by 50% from data in 2000 by 2039, around an 19% increase from 2019 levels. Brent's density is in the mid-range of all London Borough's, far higher than Havering (where half of all land is green space) but almost half the density of Kensington & Chelsea (Figure 124). Inner London densities are higher compared to outer London boroughs and the Greater London average, however they are relatively low compared to some European capitals. The Department de Paris has a population density of 213 per HA and whilst Madrid's Centro district has a population density of 286 per HA²⁴⁵. Going forward maximising density will be integral to housing delivery.

²⁴⁵ London First, Savills PLC (2015) Redefining Density: Making the best use of London's land to build more and better homes, London: Greater London Authority.

Figure 124: Population density per HA

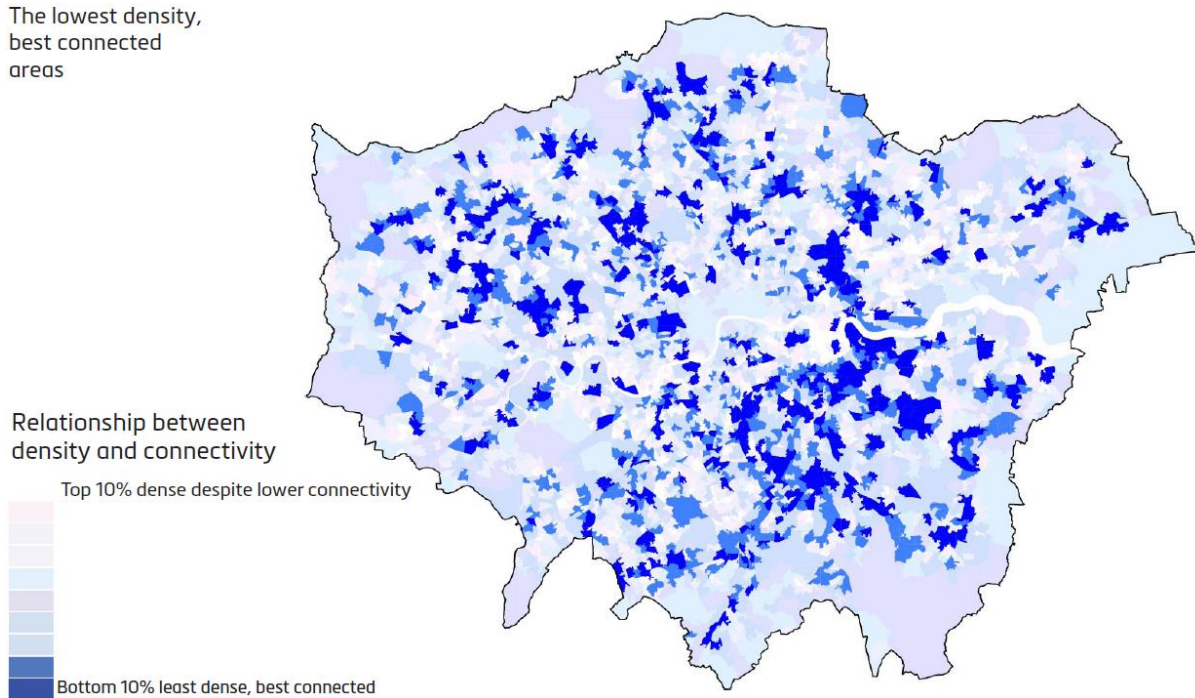


Source: GLA: March 2018

Observed density of development across London is the output of a broader range of factors such as transport connectivity, the location and characteristics of the site and social infrastructure requirements (Figure 125). Ensuring these factors are properly balanced and, in particular, that new homes (including new homes in mixed-use development) are well-designed and of a high-quality, allows for higher densities to be achieved. The GLA report on redefining density shows us the opportunities if connected areas with a low housing density were to match the density of similarly connected but higher density areas, this would – in principle – create approximately 1.4 million new homes across London. This is around 1 million more new homes than the current 10 year London Plan house building target.

Figure 125: Relationship between density and connectivity map in London

The lowest density, best connected areas



Source: Savills analysis from Redefining Density

Brent Council has established growth areas where new housing, commercial and office space will be developed, as well as, new transport connections. The 5 established growth areas in Brent are Wembley, Alperton, Church End, Burnt Oak & Colindale and South Kilburn. In the Local Plan Preferred Options, 3 new growth areas have been identified in Northwick Park, Neasden Station and Staples Corner. All established and emerging growth areas are anticipated to accommodate increased levels of housing density.

Moreover, GLA's current housing strategy outlines the importance of higher density homes across the city, including in outer London²⁴⁶. To accommodate a growing need for densification in London, new areas for development have to be identified, with sufficient supporting infrastructure and connectivity to ensure development is sustainable. Two ways that have been identified by the GLA are through Opportunity Areas (or growth areas) and the better utilisation of Town Centres and High Streets. Design will also place a crucial role to maximising density with London. Often there is an association between increasing density and high-rise buildings. Whilst high-rise buildings do have a place in certain areas where they fit in with the landscape, they are not the only solution. For outer-boroughs, like Brent, mix of mid-rise buildings, mansion blocks and terraced housing along more traditional street patterns will help increase density and make efficient use of land²⁴⁷. The Draft London Plan (2017) sets out new density targets for developments to make sure it has optimal capacity.

Trend 5: Maximising land use through mixed use development

Lifestyle changes such as, working from home, the need for smaller spaces (due to young people living by themselves and not having children) as well as the need of proximity to basic infrastructure and services, leads to new housing typologies. The population growth anticipated in London over the coming year's demands additional homes however an additional requirement will be the need for additional office and employment space. Some projections state the growing number of employees in London will require an additional 20m sq. ft. of office space over the next five years – the equivalent of increasing the City of London by 25%²⁴⁸. Increasingly developers are proposing mixed use development, combining residential, infrastructure and commercial uses, to make better use of the land. Mixed use developments can range from a single building to an entire neighbourhood, and are typically developed to be responsive to a specific environment. Mixed use developments are able to adapt to changing lifestyles and needs of and within London, improving employment infrastructure opportunities as well as increasing access to necessary amenities all within close proximity. Planning for mixed-use developments in all parts of London will spread the success of London's economy and create stronger communities.

Current growth in Brent has showed the demand for mixed use development in its 5 established growth areas and 3 emerging growth areas (Figure 126). The Core Strategy, 2010 and the Wembley Area Action plan outlined the initial concentration of regeneration in Wembley, with the overarching aim of transforming the Wembley Link area into a sustainable mixed use community. The transformation of Wembley provides evidence to the growing trend towards the benefits of mixed use developments, with Wembley Park having constructed 7,000 new homes and more than 8,640 new jobs (excluding those within construction)

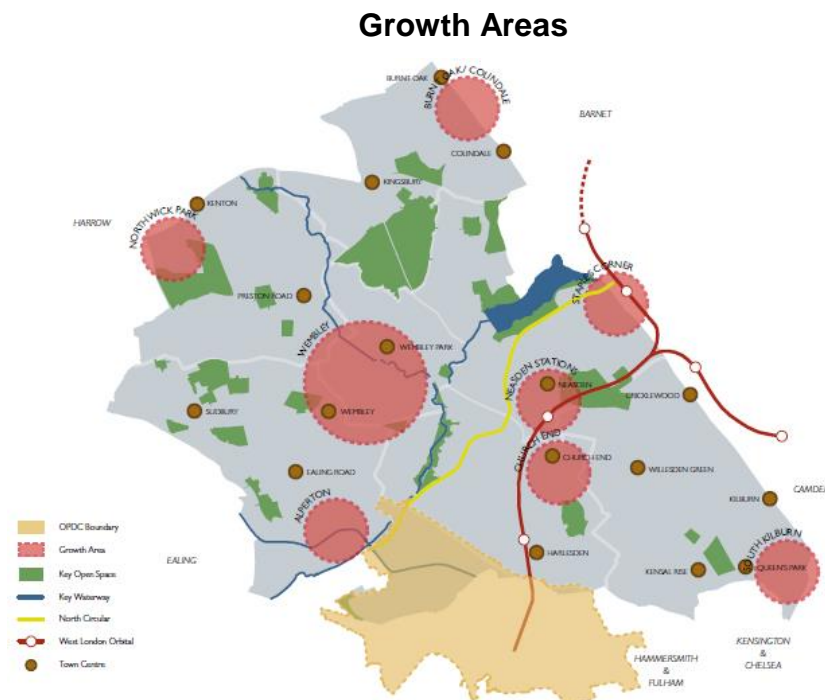
²⁴⁶ Greater London Authority (2017) *London Housing Strategy: Draft for Public Consultation*, London: Greater London Authority

²⁴⁷ London First, Savills PLC (2015) *Redefining Density: Making the best use of London's land to build more and better homes*, London: Greater London Authority.

²⁴⁸ Savills PLC (2016) *Spotlight: London Mixed Use Development*, London: Savills PLC

created²⁴⁹. Mixed use development is being utilised in all of Brent’s current growth areas and in estate regeneration, with South Kilburn expected to deliver 2,400 additional homes (including 1,200 for social tenants) as well as new retail, leisure, education and health facilities²⁵⁰. The benefits mixed use developments bring will continue to make them at the forefront of regeneration programmes.

Figure 126: Growth areas in Brent



Source: Brent Local Plan Preferred Options, 2018

Vacant industrial land has been identified for both mixed-use development, residential development and office and retail space in London. The London Plan (2011) set policies that adopted a rigorous approach to industrial land management including the transfer of surplus industrial land to other uses, especially housing. Alongside this the GLA Supplementary Planning Guidance set benchmarks for the release of industrial land for non-industrial uses²⁵¹. However past trends in industrial land release show an accelerated rate of release significantly above these benchmarks. The trend rate of release for 2010 to 2015 was 105ha per annum, compared with the SPG recommended rate of release of 37ha per annum. The GLA have anticipated that if these trends continue then the total stock of industrial land in London will decline by 33% from 2015 to 2041; from around 6,980ha in 2015 to around 4,700ha by 2041²⁵² (Figure 127).

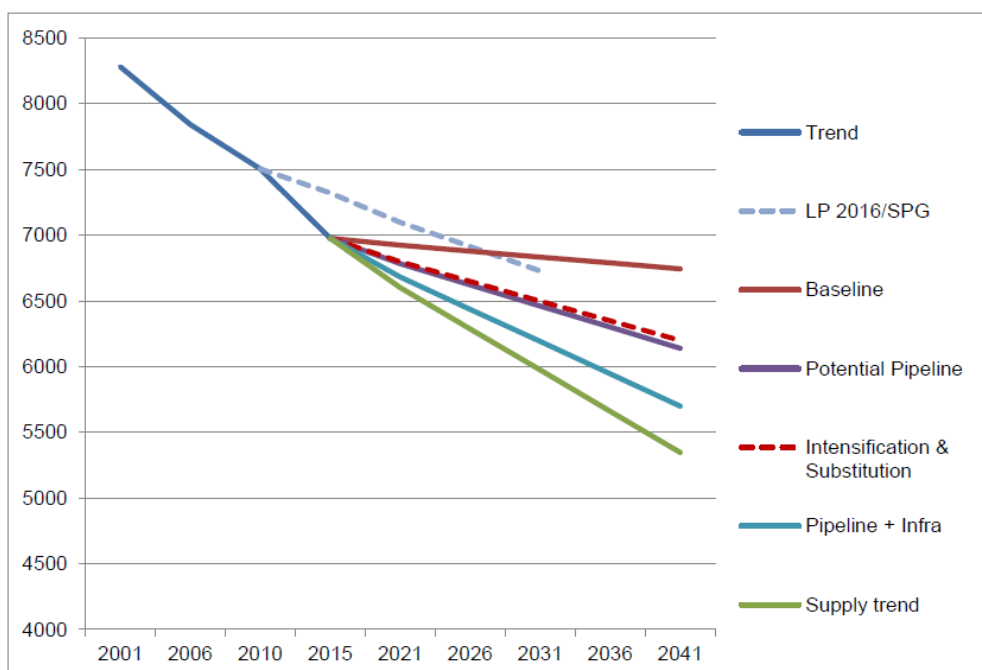
²⁴⁹ Quintain (2018) Wembley Park. Available at: <http://www.quintain.co.uk/wembley-park>

²⁵⁰ Brent Council (2016) South Kilburn Masterplan Review, London: Brent Council

²⁵¹ Greater London Authority (2012) *Land for industry and Transport: Supplementary Planning Guidance*, London: Greater London Authority

²⁵² Greater London Authority (2016) *London Industrial Land Supply and Economy Study*, London: Greater London Authority

Figure 127: Trend in total stock of industrial Land and industrial land release scenarios (ha) 2016-2041



Source: London Industrial Land Demand – CAG Consultants

There is now a strong policy response that if more industrial and employment land is to be released moving forward, then there must be greater co-location and closer adjacency of residential and employment use, which is something planning has previously sought to separate in London. The Draft London Plan (2017) outlined the relaxation of restrictions on Strategic Industrial Locations (SIL) and Local Significant Industrial Sites (LSIS) (formerly protected for industrial land use) to allow intensification, co-location and substitution moving forward. The Draft London Plan (2017) indicates development plans and local plans should facilitate best use of SIL and LSIS to offer residential, industrial and other non-industrial use²⁵³. In 2015 Old Oak and Park Royal Development Corporation was launched as the major regeneration project in West London – significant to Brent as Park Royal is a strategic industrial location. The regeneration programme incorporates intensification, co-location and substitution and aims to create a new urban neighbourhood at Old Oak, supporting a minimum of 24,000 new homes and an additional 1,500 in non-industrial locations in Park Royal; support the creation of 55,000 new jobs at Old Oak and a further 10,000 at Park Royal; protect and enhance Park Royal as a strategic industrial location²⁵⁴.

Wembley, Neasden and Church End are identified as central growth areas within the borough, planned for concentration and co-location of new office, commercial, industrial and residential development. Intensification of these areas would capitalise on key assets and infrastructure, including the proposed West London Orbital line, and build on existing plans for investment, development, accessibility and branding.

²⁵³ Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

²⁵⁴ Old Oak and Park Royal Development Corporation (2017) *OPDC Local Plan: Revised draft for Regulation 19 Consultation*, London: Old Oak and Park Royal Development Corporation

Trend 6: Increased use of Town Centres and High Streets for Housing delivery

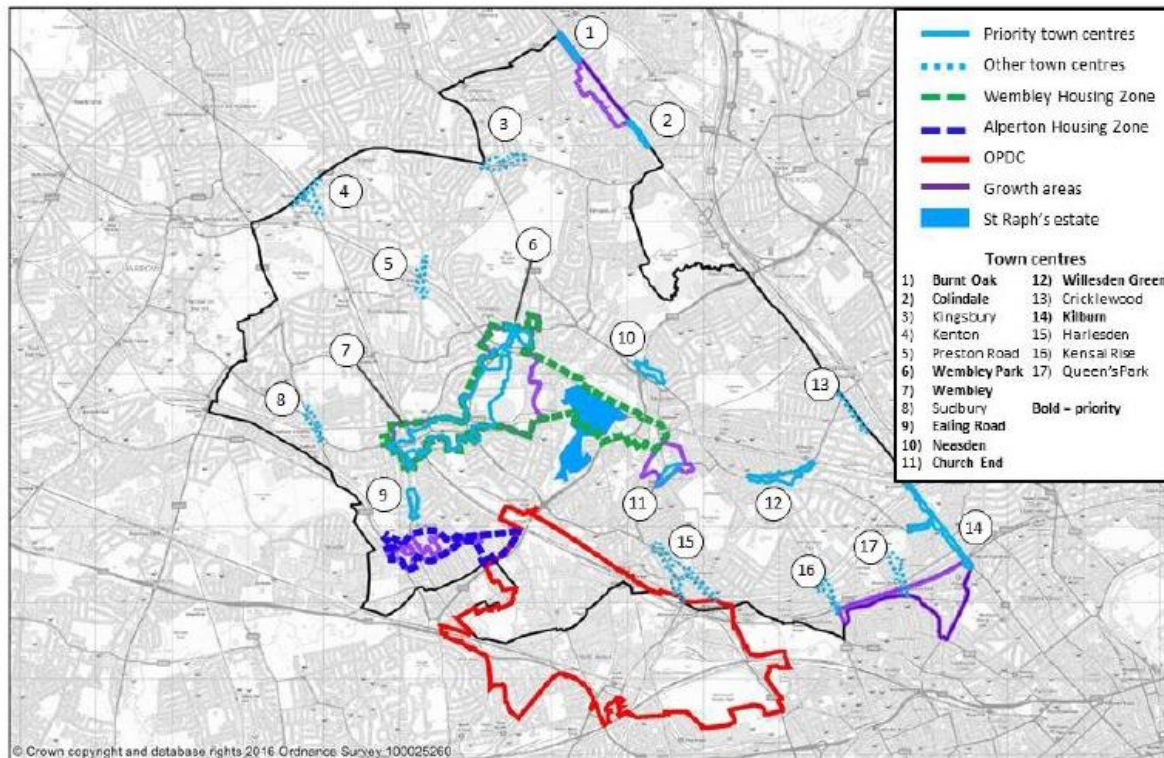
Nearly every person in Brent lives half a mile from a high street. They form the heart of the borough, with great diversity and character (Figure 128) have become opportunity areas for not only vibrant commercial and office space but for housing as well. Due to their centrality and connectivity to the rest of the borough High Street demand for housing will continue to grow. The Draft London Plan (2017) highlights the growing importance of Town Centres laying out their unique position to support the clustering effect of businesses known as ‘agglomeration’²⁵⁵. However, with the growth of online retail markets and out of town retail centres, town centres have an increasingly difficult market to generate income and stay vibrant attractions in our towns, despite their often good transport links. The Draft London Plan (2017) identifies that Town Centres will need to adapt to these challenges which includes becoming locations for housing development. The London Strategic Housing Land Availability Assessment supports this notion and identified Town Centres to be able to deliver 3,369 large sites with the capacity for 155,137 new dwellings from 2015 to 2025, the equivalent of 15,500 homes per annum²⁵⁶. Within their assessment, Cricklewood and Wembley as two key areas in which Town Centre development could be utilised – delivering 4,200 and 4,810 homes respectively. Brent Council have identified nine high streets for development including Harlesden, Kilburn High Road, Church End, Neasden, Burnt Oak, Colindale/The Hyde and Willesden with a key area of focus being to accommodate future housing needs and growth²⁵⁷. The centrality of Town Centres will continue to make them an ever-increasing attractive area for residential development, helping to increase housing supply but also revitalise high streets in challenging environments.

²⁵⁵ Greater London Authority (2017) The London Plan: The spatial development strategy for Greater London, Draft for public consultation, London: Greater London Authority

²⁵⁶ Greater London Authority (2014) Accommodating Growth in Town Centres, London: Greater London Authority

²⁵⁷ Brent Council (2017) Cabinet Report: Town Centres Action and Investment Plan, London: Brent Council

Figure 128: Brent's High Streets and Town Centres



Source: Brent GIS Mapping: 2017

Trend 7: Increase of the Private Rented Sector (PRS)

Deregulation of private rents from the 1980s has driven the costs for tenants in the private rented sector over time, and also had a feedthrough effect on social rent levels which are set in part with reference to prevailing market conditions.

London's Private Rented Sector (PRS) has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025²⁵⁸. There are a variety of policy responses and demographic trends which show that the PRS will grow and become an even bigger part of the housing market. The vast majority of homes in the private rented sector are owned by small scale, amateur landlords which allows for disparity in renting experience²⁵⁹. However large scale 'Build to Rent' developments have increased significantly in the last couple of years and are now driving the growth in the private rented sector²⁶⁰. Build to rent is not a new product in London – institutional investors owned mansion blocks in central London in the 60s & 70s, but due to increasing controls on rent, most of these were sold off. Europe and North America have well established build to rent sectors that house a wide variety of household types²⁶¹. Build to Rent is therefore an effective way to deliver a mix of housing for a variety of households.

²⁵⁸ Future of London (2017) *Engaging London's Private Rented Sector*, London: Future of London

²⁵⁹ London Councils, London First, Turley (2017) *Everything you need to know about build to rent in London*, London: London Councils, London First, Turley

²⁶⁰ Ibid

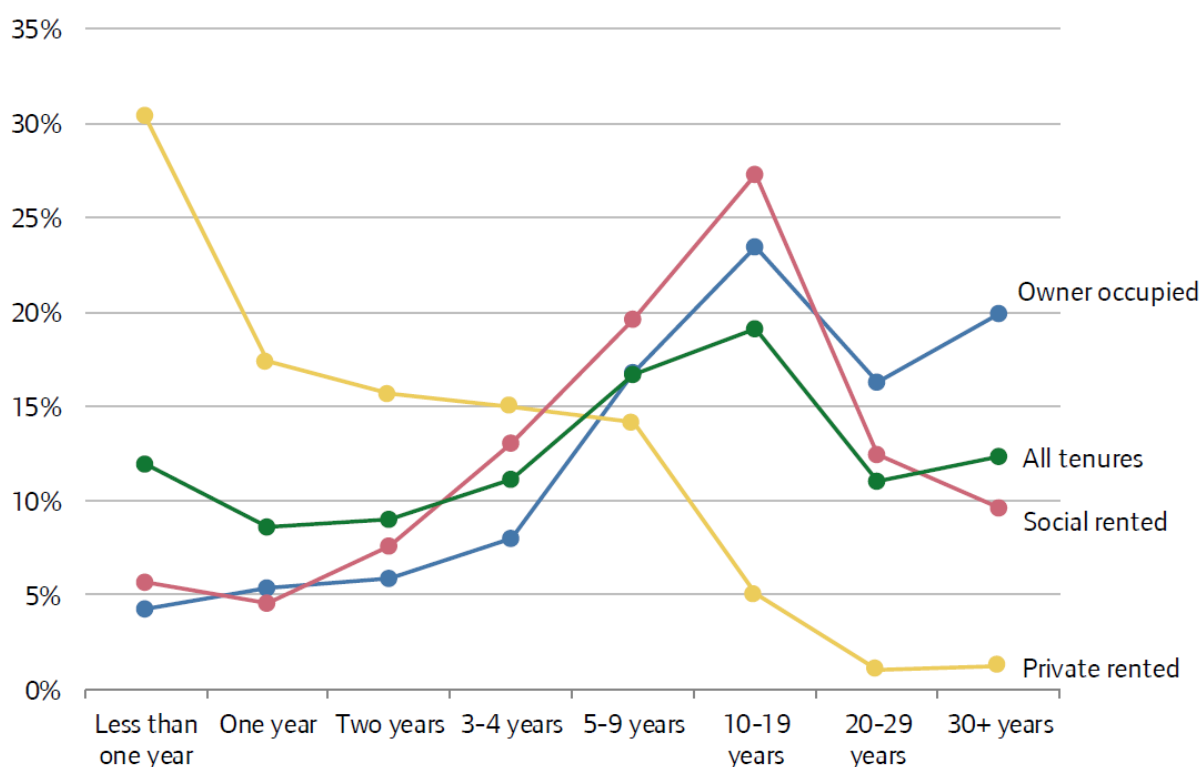
²⁶¹ Ibid

Build to Rent (BTR)

Just as in London, Brent has started to take advantage of the emerging purpose-built private rental sector or Build to Rent (BTR) to help increase housing delivering while keeping housing units affordable. BTR can also support the development of new tenure typologies for private renters and help relieve a housing market that relies largely on build for sale-led developments. BTR decreases the waiting period for housing delivery as they have a broader demand – demand for renting is higher than for new build sale²⁶². As of 2016, just over 10,000 build to rent homes had been built, with another 9,500 under construction. In 2017 Quintain, the developers leading house building in Wembley, announced plans to develop 5000 PRS homes around Wembley Stadium, becoming the largest build to rent site in the UK²⁶³.

The specialist Build to Rent company Tipi – Quintain’s rental company – have introduced a new kind of housing concept. The focus of the new management company is to take the hassle out of renting by including all utility bills in the rent and to provide an offering that is flexible, with no agent or end of tenancy fees to pay. The flexibility will also reflect the trend towards shorter tenancy periods as the GLA estimate that one in eight London households and one in three private renters have lived in their current home for less than a year (Figure 129)²⁶⁴

Figure 129: Length of time in current home by tenure, London



Source: GLA Housing in London: 2018

²⁶² Greater London Authority (2017) HOUSING IN LONDON: 2017 The evidence base for the Mayor’s Housing Strategy, London: Greater London Authority.

²⁶³ Quintain (2017) *Wembley Park set to become the largest build to rent development site in the UK* (Published 7th February 2017) Available at: <http://www.quintain.co.uk/news-and-media/press-releases/2017/07-02-2017>

²⁶⁴ Greater London Authority (2017) HOUSING IN LONDON: 2017 The evidence base for the Mayor’s Housing Strategy, London: Greater London Authority.

The Tipi model will accommodate the increased level of mobility within London which allows flexibility for individuals within the private rented sector but also focuses on improving the quality of supply including assurances surrounding security of tenancy. Brent Council recognises a need to focus on improving the quality and security of the private rented sector and, alongside plans and commitments made by the London Mayor. The Mayor wants to further encourage institutional investors to make private renting better for tenants²⁶⁵. The focus on the development of the quality and security of the private rented sector will continue to grow as PwC estimated in 2016 that a 20-39 year old on average income who was looking to buy their first home would need 19 years to save the £115,000 (average deposit required to buy a property in 2035) without having any additional funds from other sources²⁶⁶. Also Brent's changing pattern of diversity is an important factor. For example, the White Other group has grown, mainly as a result of inward migration from Eastern Europe, with the private rented sector the main source of housing²⁶⁷.

The Government and the Mayor of London are pressing for further investment in the BTR sector. The BTR fund was set up from 2012 to 2016, which is now incorporated in to the wider Home Building Fund. The Housing SPG (2017) and Draft London Plan (2017) understands the need to look at BTR differently from traditional developments and sets alternative planning guidance through five principles in the BTR pathway. BTR is key in delivering affordable housing and the pathway includes guidance on affordable housing delivery in which affordable homes are kept under single management to encourage discounted market rent, preferably at London Living Rent levels²⁶⁸.

BTR is however not a silver bullet to the housing crisis as the impacts of 'Generation Rent' are becoming apparent. PwC project that by 2025 an additional 1.8 million households will be in PRS, amounting to a total of 7.2 million or about 1 in 4 households, with the majority of renters being in the 20 – 39 age bracket²⁶⁹. Projections by Scottish Widow indicate that one in eight retirees, equating to over 1 million people, will be living in rental accommodation in 15 years and crucially 67% of renters aged 50 – 64 who plan to rent in retirement say they have no plans to increase their pension contributions²⁷⁰. At the same time the proportion of retiree income spent on rent is projected to significantly increase, particularly in London (Figure 130). The widening gap in income and rent for an increasing number of retiree renters' leads many to believe there will be an increase reliance on state intervention.

²⁶⁵ Brent Council (2018) Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation, London: Brent Council

²⁶⁶ PwC (2016) 3 – UK Housing market outlook: the continuing rise of Generation Rent, London: PwC

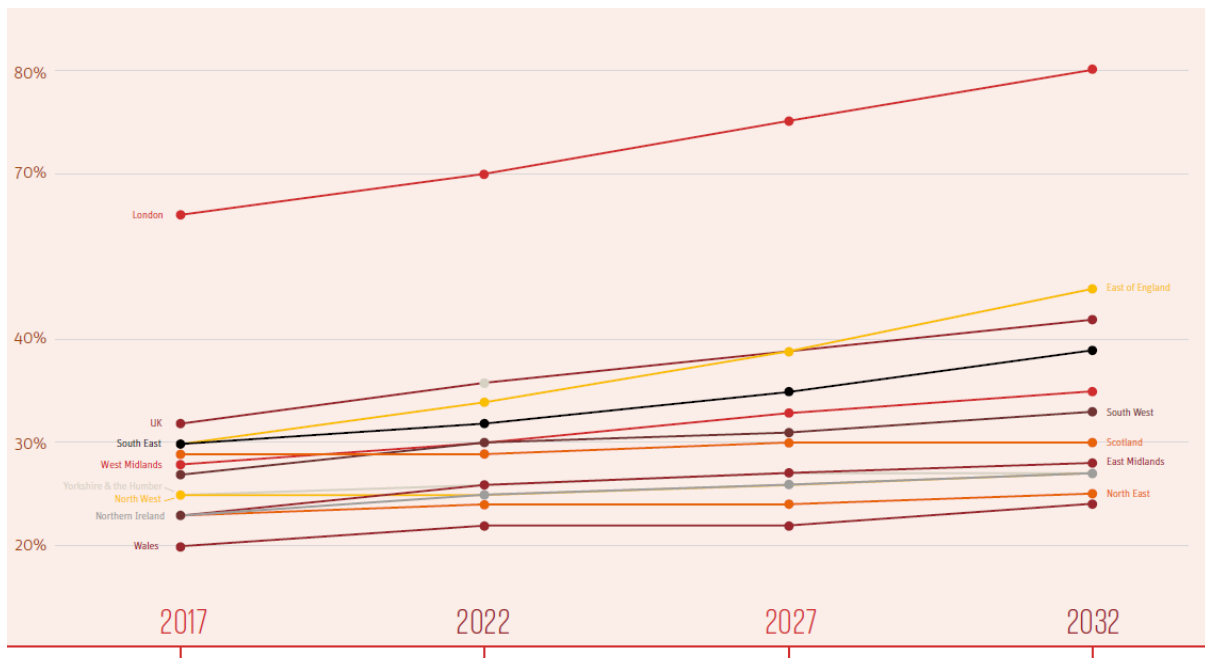
²⁶⁷ Brent Council (2018) CMT Report: Housing Supply and Affordability, London: Brent Council

²⁶⁸ Greater London Authority (2017) Homes for Londoners: Affordable housing and supplementary planning guidance, London: Greater London Authority

²⁶⁹ PwC (2016) 3 – UK Housing market outlook: the continuing rise of Generation Rent, London: PwC

²⁷⁰ Scottish Widows (2017) Retirement Report 2017 – Renters in Retirement, UK: Scottish Widows

Figure 130: Proportion of Pensions income spent on rental payments



Source: Retirement Report 2017, Scottish Widows

Greater access to affordable homes, routes into home ownership and mobility between tenures need to be encouraged to counter-balance the risks associated with an increased dependence on PRS.

Responses

Brent must make important policy changes if it is to meet housing demand over the next 20 years. Following the Mayor's Housing Strategy; Registered Providers, Local Authorities, institutional investors, and small builders will all need to play a far greater role if a step change in housing delivery is to be realised.

Response 1: Change in Demographic Structure and Household Mix

Brent will have to deal with a shifting age population and new housing typologies should be studied and developed. Brent's NAIL programme should continue and expand its stock to provide proper housing options for the ageing and elderly population. This is important as the built environment has a huge impact on the experience of ageing.

The Build to Rent industry, which targets younger professional sharers, could create new designs for older people. These could be for couples looking to downsize, or single people. These places could look to address issues faced by older people by for example creating communal spaces that help prevent social isolation²⁷¹.

There are increasing numbers of multigenerational households in the UK. Multigenerational living is when there are three or more generations of the same family living together, or where there are two generations consisting of parents and one or more adult children. To date, multigenerational living in the UK has mainly been driven by a lack of affordable family homes and has mostly been informal. Multigenerational living is also used as solution for ageing relatives needing support. There are some examples of purpose built intergenerational housing in Europe where similar issues are faced in relation to housing: young people struggle to afford housing and isolation and loneliness are affecting quality of life for older people. Intergenerational housing solutions are emerging as symbiotic, mutually beneficial, solutions to these issues.

In Alicante, Spain a scheme has provided 244 affordable, intergenerational housing units in central urban areas. The project, which started in 2003, is run by the Municipal Project for Intergenerational Housing and Community Services. Alicante's intergenerational model has been successful in allowing older residents to remain in their homes in later life. It aims to address the housing problems of low-income old and young people. The young people spend a few hours per week with four older people, liaising with the facilities management team if additional help is needed. The young people are selected based on income and their suitability for the social programme. The project was shortlisted for the Building and Social Housing Foundation's World Habitat Awards in 2012²⁷².

Other similar schemes have taken place in Deventer, Holland, students enjoy free board at Residential and Care Center Humanitas. The success of both schemes is their ability to provide clear benefits to both demographics. This boosts social interaction, while students share time and skills in exchange for low or free rent and access to facilities which would normally be outside their budgets.

Although the ageing population is a pressing issue, the majority of Brent's population in 2040 will be of working age. There will be an increased need to provide accommodation suitable for working professionals. An example, of a project that has tried to address this is The Big Blue

²⁷¹ Future of London (2017) *Engaging London's Private Rented Sector*, London: Future of London

²⁷² Ibid

programme by Network Homes converted an IBM office complex to a 270-unit PRS development in Sudbury Hill, Harrow. It will offer studio, one-bedroom and two-bedroom homes, all at 80% discount market rents. GLA made a £20.8m loan through its London Housing Bank, an initiative set up in 2014, meaning the Big Blue is the first Build to Rent development to receive loan funding. The project is the first of Network Homes' SmartRent schemes, which aim to deliver well-connected, purpose-built homes for professionals. As the model relies on retaining tenants and minimising vacant units, eligibility criteria include a minimum salary (though also a ceiling of £90,000 per annum) and no history of rent arrears. Applicants must also live or work in London²⁷³.

Build to Rent Schemes can be used to ensure that homes are built with specific demographics in mind, having a clear vision of what the borough will need in 2040.

Response 2: Demand & Supply Imbalance

As stated in the baseline, the construction and development of new housing and growth areas is in the hands of just a few companies, slowing down housing supply. Brent Council should encourage the diversification of the housebuilding industry, increasing the number of actors on the stage, including Registered Providers, small and medium sized builders, resident's self-building and the Local Authority itself.

Brent has already taken steps to diversify supply of temporary accommodation. The Temporary Accommodation reform plan adopted in 2016 outlined the Council's commitment to purchasing units in the private rented sector, i4B Holdings Limited was created to carry out this function and Brent Council being its sole shareholder. The Council should continue to invest in the acquisition of properties through i4B and offer guarantees of affordable rents for households that the Council has a responsibility to. This is particularly important because of the lack of supply of larger properties required for temporary housing.

The London Housing Strategy set out aims to encourage the diversification of the homebuilding industry, through the 'Small Sites, Small Builders' programme and other initiatives²⁷⁴. One way Brent Council could encourage this is by identifying small sites, land and assets suitable for development by small and medium sized homebuilders and housing associations to facilitate the delivery of additional homes for Brent. Brent Council could encourage small and medium sized homebuilders to access initiatives like Housing Growth Partnership which aims to provide small and medium sized homebuilders with much needed funding for new projects. The Council could also develop joint ventures with small and medium sized house builders on identified small sites. In 2017 Birmingham City Council launched a new programme to support small and medium-sized house builders. The 4-year programme will see small and medium sized house builders working for Birmingham City Council's housebuilding arm – Birmingham Municipal Housing Trust. The programme has been set up to make the most of the land sites available and to address the issue of small sites²⁷⁵. The schemes allow Birmingham City Council to work with smaller companies that are best placed

²⁷³ Network Homes (2018) *Network Homes to create 270 homes in first Build to Rent development on 'Big Blue' site*, Available at: <https://www.networkhomes.org.uk/news/latest-news/2017-news/network-homes-to-create-270-homes-in-first-build-to-rent-development-on-big-blue-site/>

²⁷⁴ Mayor of London, London Assembly (2018) *Mayor launches small homebuilders scheme with TFL* (Published 6th February 2018) Available at: <https://www.london.gov.uk/press-releases/mayoral/mayor-launches-small-homebuilders-scheme-with-tfl>

²⁷⁵ Local Authority Building & Maintenance (2017) *Birmingham City Council launches new programme to support small and medium-sized housebuilders* (Published 29th March 2017) Available at: <http://labmonline.co.uk/news/new-programme-supports-small-housebuilders/>

to build on smaller plots of land. The new system will see homes built on designated small sites of up to 15 houses.

A further step the council could take is setting up its own development company to support the building of homes. The London Borough of Croydon did this when they set up Brick by Brick Croydon Limited (BxB), with the council acting as sole shareholder. It aims to deliver high quality, new, residential-led development on a range of sites across the borough. As well as being able to make sure the borough fully benefits from land value uplift and development returns, Brick by Brick will be able to deliver directly and act quickly to new opportunities in the market place²⁷⁶.

The company was setup with loans taken from the council. The interest charged on loans made to BXB are projected to generate £17.7m for the Council. In addition, the company also covers the estimated £927k annual cost of the Council's in-house Development team (which all provide services to BXB). It also currently contributes an estimated £362k per annum to cover the costs of various services that it buys from the Council (such as accommodation, ICT, HR, etc.)²⁷⁷.

Response 3: Increasing Unaffordability

Homelessness

The Homelessness Reduction Act 2017 (HRA) requires councils to provide homelessness assistance to any UK citizen or person with the right to reside. This was due to be implemented in April 2018 in preparation the Council has implemented the Single Homelessness Service and the Single Homelessness Prevention Service (SHPS) to support vulnerable adults in housing need²⁷⁸.

The London borough of Southwark has been piloting the act and the new approach has delivered positive effects. Numbers of households being put up in temporary homes have halved in a year, and the use of unsuitable and expensive bed and breakfast accommodation has been eliminated²⁷⁹. Other approaches to tackling forms of housing should also be explored. Project 99 a new Housing Scheme launched and will house 10 homeless young people by the New Horizon Youth Centre. The project is designed to overcome the problems that keep these young people trapped in homelessness, with no requirement for a deposit, affordable rent and acceptance for those in receipt of housing benefit. Included in this project is a year of targeted support at New Horizon Youth Centre for all residents, from emotional and mental health assistance to help with education and employment, giving them everything they need to begin living independently after their tenancy. In general, Shelter recommends that all Local Authorities should consult with an expert panel of people with personal experience of seeking homelessness assistance in their area when planning how to implement their new duties²⁸⁰.

²⁷⁶ BXB Development (2018) Available at: <http://www.bxbdevelopment.com/>

²⁷⁷ London Borough of Croydon (2016) *New homes for Croydon: Frequently asked questions*, London: London Borough of Croydon

²⁷⁸ Brent Council (2018) *Equalities Committee: Homelessness Reduction Act: Equality Impact Analysis*, London: Brent Council

²⁷⁹ Southwark Council News

²⁸⁰ Shelter (2017) What service users need from assessments and personalised housing plans – Homelessness Reduction Act, London: Shelter

Access to PRS for LHA claimants

To approach the barriers young, single LHA claimants have in accessing the private rented sector Brent Council should improve the awareness of welfare policy and reform with private landlords. One way The London Borough of Croydon has done this is through working with private landlords directly. London Borough of Croydon has established, through tender, a panel of eight private sector landlords that will act as managing agents for houses in multiple occupation, for placement of homeless households. The private sector landlords will spread the word about the scheme – the guarantee of income and expected standards – and bring forward suitable properties. The Council have implemented a monitoring system to ensure performance²⁸¹.

Fuel Poverty

Tackling fuel poverty is another way to help reduce unaffordability in Brent. Action on fuel poverty can improve people's lives while helping to reduce demands on public spending. Households living in or on the brink of fuel poverty often face very difficult trade-offs between meeting their fuel bills, spending on other essentials such as food and falling into debt, all of which can exacerbate physical and mental health problems.

One way some Local Authorities have been tackling fuel poverty is through setting up council run energy suppliers. Nottingham City Council set up the not for profit company Robin Hood Energy in 2015 with the aim to make energy affordable for all. Robin Hood Energy differs from other arrangements as the council is acting as administrator and supplier buying directly from the grid, with no third party involved. Robin Hood Energy has made partnerships with Leeds City Council to establish White Rose Energy, providing affordable energy in Leeds and Yorkshire²⁸². In October 2017, the London Borough of Islington launched Angelic Energy, London's first not for profit energy company in partnership with Robin Hood Energy²⁸³. This model reinvests any income into providing good value energy to help the poorest households that are often on 'pay as you go' rates.

Mix of Tenure

There is a need for a diverse supply of new housing. Delivering additional homes is important but should be achieved with a balanced mix of tenures including market, intermediate and social rent. Diversity in tenure type requires diversity in funding sources and variety of delivery models involving the private and public sectors. By ensuring a mix of housing tenures, output for housing delivery is more productive long term and resilient to market fluctuations²⁸⁴. The Draft London Plan (2017) commits to a long-term strategic plan to maximise the delivery of affordable housing and ensure that half of all new homes in London are genuinely affordable to the people who live in London. It is recognised the private sector will be unlikely to be able to deliver the required affordable housing and the Mayor of London intends to support affordable housing delivery through investing more, bringing forward more public sector land for development, and by increasing the amount of affordable housing delivered through the planning system²⁸⁵.

²⁸¹ Local Government Association (2012) *Shaping and Improving your private rented sector*, London: Local Government Association

²⁸² Leeds Council (2018) *Heat your home for less – White Rose Energy* Available at: <https://www.leeds.gov.uk/your-council/planning/heat-your-home-for-less/white-rose-energy>

²⁸³ Islington Council Media Centre (2017) *Angelic Energy: Islington Council launches new, fairer energy provider for London*, London: London Borough of Islington. Available at:

²⁸⁴ Shelter (2014) *In the mix: the need for a diverse supply of new homes*, London: Shelter

²⁸⁵ Greater London Authority (2017) *The London Plan: The spatial development strategy for Greater London*, Draft for public consultation, London: Greater London Authority

Brent Council should ensure a variety of both intermediate, affordable and social rent to meet its housing need through new schemes set out by the Mayor of London including incentives for developers to deliver affordable housing such as grant and public funding. Making use of a variety of new affordable initiatives, such as London Affordable Rent, London Living Rent, London Shared Ownership, is crucial to offer routes into home ownership and mobility between tenures to counter-balance the risks associated with an increased dependence on PRS.

Response 4: Densification

There are various ways the density of housing in the borough could be increased. Below the examples of Estate Redevelopment or Infill, Increased density in Suburbs and making use of transport links are provided to show how densification could be used.

Estate Redevelopment or Infill

The redevelopment of council estates could be a way to put more homes into Brent in a systematic way.

Challenges with this method include finding accommodation for existing tenants whose homes need to be demolished, and reducing the number of times that people have to move as the estate is remodelled. Community infrastructure also needs to be planned alongside the redevelopment – many estates include schools or health centres that need to be rebuilt without disruption to users. Councils are major landowners in London, much of it in housing estates. Redeveloping their land already used for homes at higher densities is while also tackling problems of ageing social housing stock i.e. energy efficiency.

Increasing Density in the Suburbs

In London 20% of the population occupies 40% of residential land. If the number of homes in these low density suburbs could be incrementally increased by 10%, still well below the current average London density, it would deliver around 75,000 homes. Brent Council Issues and Options paper identifies the north of the borough having retained a 1920-30s lower density typology of 'Metroland' suburbia offering opportunities to increasing housing delivery but around the existing character of the area²⁸⁶.

While Londoners as a whole are generally supportive of new housebuilding, research has found outer Londoners much less supportive, which makes it more difficult to add density to the suburbs quickly. However, there are methods which can increase housing provisions with minimal disruption to a neighbourhood's local character. The London Borough of Wandsworth took this approach and delivered 238 homes over ten years with its 'hidden homes' initiative. The hidden homes initiative transforms empty or derelict areas such as old laundries, store sheds, garages, parking, space under existing residential blocks and boiler rooms into new homes. Traditionally, most hidden homes have been built at the ground and lower ground level. But the council's approach has delivered flats in an elevated position to the rear of a block, on roofs and as lateral extensions²⁸⁷. Development like this can help sustain the local economy, creating a vibrant neighbourhood. Likewise, adding additional levels to blocks of

²⁸⁶ Brent Council (2018) Shaping Brent's Future Together, Local Plan Issues and Options: Regulation 18 Consultation, London: Brent Council

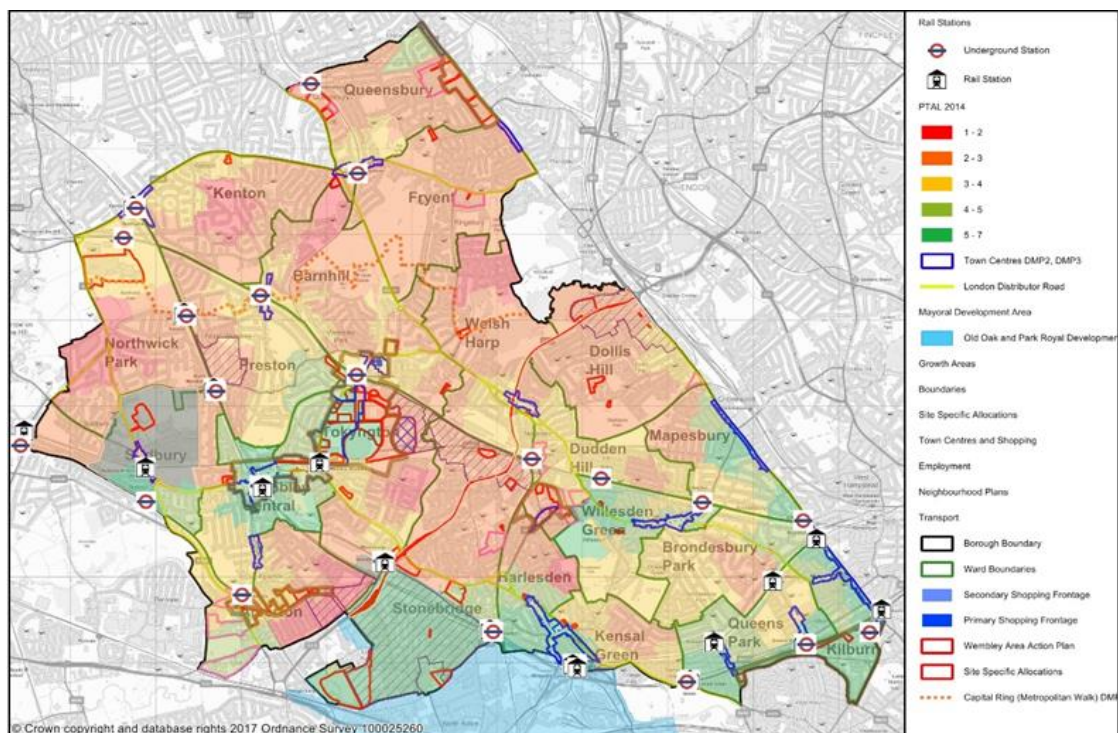
²⁸⁷ London Borough of Wandsworth (2018) *Hidden Homes*. Available at: http://www.wandsworth.gov.uk/info/200561/resident_involvement/247/hidden_homes

flats offers a good way to make better use of existing stock in a manner that causes minimal disruption to the local community.

Transport

Public transport is of central importance to unlocking land opportunities and support housing delivery. The development of public transport must be done alongside a move toward the majority of short trips being walked or cycled to support higher densities and vibrant places. The map below (Figure 131) shows proposed transportation and current transport stops and the PTAL levels, if housing is to be built or refurbished in areas with low PTAL level the council needs to work alongside TFL for better connections.

Figure 131: proposed transportation and current transport stops



Source: Brent GIS Mapping

Engaging local communities is an essential step in redeveloping an area. Commonly local communities worry about densities increasing in their area due to the effect on surrounding social and physical infrastructure, local amenities, the size of homes, and adequate open space, both public and private²⁸⁸. The council needs to make a case for the benefits of redevelopment. Highlighting how making better use of land can also help deliver more and better transport infrastructure, which denser urban neighbourhoods require, by creating increases in land value²⁸⁹. A way to do this may be integrating sites into the existing fabric of the areas or ensuring that community services are provided.

An additional way Brent Council could densify transport locations is through exploring above and around station development. TfL have embarked on a programme of retail, commercial

²⁸⁸ London First, Savills PLC (2015) Redefining Density: Making the best use of London's land to build more and better homes, London: Greater London Authority.

²⁸⁹ Ibid

and residential developments at a number of Elizabeth line stations in central London. Plans are in place for 12 major property developments over and around the new Elizabeth line stations and construction sites. In total, the development plans cover more than three million square feet of office, retail and residential space between Paddington and Woolwich²⁹⁰.

TfL have identified further sites for potential development including at the new 'Nine Elms' station on the extension of the Northern Line. Lambeth Council granted Transport for London (TfL) planning permission for a new development above and around the new 'Nine Elms' station being built as part of the extension of the Northern line. The development will see the delivery of 332 new homes, 84 of which will be affordable across four blocks, three of which would be above the new underground station²⁹¹. TfL development programme offers opportunities to build homes around the transport hubs and want to work with Local Authorities to do so. Other identified sites include Harrow on the Hill and Northwood stations.

Challenges for these types of development include complicated logistics and public resistance to disruption of station services, as well as commercial challenges. However, Centre for London believe developing above and around stations delivers multiple benefits: from the creation of new land, new homes and new commercial centres in a space-constrained city, to the emergence of exciting new civic eco-systems and public realm²⁹². A Centre for London study identified potential stations sites suitable for densification by selecting station areas that are well connected, but had lower residential densities than would be expected from their dominant local character. The 40% least dense well-connected stations were in a predominantly 'central' setting, with Kilburn being identified as a potential station site for densification in Brent²⁹³. TfL and Network Rail are among the largest landowners in London and both have plans to release or construct their landholdings within the next 5 years, looking to develop joint venture partnerships to facilitate housing delivery^{294,295}.

Response 5: Town Centres, High Streets and Mixed Use Development

The Draft London Plan (2017) sets out the priority to develop Opportunity Areas, brownfield land, and surplus public sector land, sites which are well-connected by existing or planned Tube and rail stations, sites within and on the edge of town centres, and small sites. Intensification of sites should facilitate the delivery of residential and other uses, as well as develop social infrastructure and contribute to town centre and high street renewal²⁹⁶. The increase delivery of housing in town centres and high streets has been identified as a trend moving forward and one way of realising this is through higher density mixed-use or residential development. Through this, councils will be able to capitalise on the availability of services within walking and cycling distance, as well as excellent public transport links. The diversification of town centres and high streets is important as the Centre for Retail Research

²⁹⁰ Transport for London (2018) Property development above Elizabeth Line stations to create jobs, growth and revenue. (Published March 2018) Available at: <https://tfl.gov.uk/info-for/media/press-releases/2018/march/property-development-above-elizabeth-line-stations-to-create-jobs-growth-and-revenue>

²⁹¹ Transport for London (2016) *TfL given the greenlight for development above future Nine Elms Tube station*, London: Transport for London. Available at: <https://tfl.gov.uk/info-for/media/press-releases/2016/march/tfl-given-the-greenlight-for-development-above-future-nine-elms-tube-station>

²⁹² Hanna, K. & Bosetti, N. (2017) *Ideas above your station: exploring the potential for development at London's stations*. London: Centre for London

²⁹³ Ibid

²⁹⁴ Transport for London (2017) *Property Development*. Available at: <https://tfl.gov.uk/info-for/business-andcommercial/property-development?intcmp=3440>

²⁹⁵ Network Rail (2016). Network Rail to unlock land for 12,000 new homes by 2020. Available at:

<https://www.networkrailmediacentre.co.uk/news/network-rail-to-unlock-land-for-12000-new-homes-by-2020>

²⁹⁶ Greater London Authority (2017) *The London Plan: The spatial development strategy for Greater London*, Draft for public consultation, London: Greater London Authority

underlines that across the UK, the share of consumer spending occurring on high streets will have declined from 50% in 2000 to 40.2% by the end of 2018. This decline is mostly in part to the rise of online retail and out of town shopping centres²⁹⁷.

High Streets then present an opportunity to meet London's housing needs through growth and intensification but any development on or around high streets needs to be carried out in a way that does not compromise a high street's ability to deliver both its economic and social functions. Instead the focus needs to be on rejuvenating areas, increasing footfalls and consolidating core retail in conjunction with increasing housing supply.

The Mayor of London has indicated a desire to explore new incentives that could help encourage landowners to consider redeveloping sites that are currently used inefficiently – these include surface car parks and single-storey low density retail centres and stores. Brent should utilise inefficiently used land for housing delivery within town centres to foster renewal and increase footfall. Whilst shifting towards town centre housing can be controversial, Brent Council will need to work with both private developers, residents and housing associations as well as TFL to maximise the opportunity. The Culture and the Night Time Economy SPG highlight Wembley and Kilburn as priority town centre locations that can diversify to support their vitality and viability. Focusing on potential residential and office uses as well as cultural facilities, such as restaurants, galleries and cinemas, in these areas will help deliver additional dwellings, potentially increase employment opportunities and develop the night time economy.

The London Borough of Hammersmith and Fulham took this approach with the King's Mall scheme in Hammersmith town centre. The developer St George West London Ltd re-developed office buildings and car park to provide a mixed-use development comprising of 418 residential units and over 500 square metres of commercial floor space, with replacement car parking and amenity space²⁹⁸. The scheme demonstrates the potential to accommodate housing growth in town centres through intensification.

Response 6: Increase of the Private Rented Sector

There is currently a lot of political momentum in the private rental sector, with the letting fee ban coming into force June 2019. Build to Rent is becoming more prevalent and the Mayor is championing a London Living Rent. The PRS is growing and is increasingly impacting more varied demographics, therefore, a coordinated response is required to ensure that the opportunities related to the PRS are utilised.

Partnership working

One step the council could take is to work more closely with Landlords. This is currently being done through licensing all private rented houses in multi-occupation (HMOs) in Brent and all privately rented properties in the wards of Harlesden, Wembley Central and Willesden Green require a licence. The Selective licensing has been extended to include all privately rented properties in Dudden Hill, Kensal Green, Kilburn, Mapesbury and Queen's Park and this scheme will come into effect on 1st June 2018. The information gathered through this should be used by the council to understand the makeup of the PRS in Brent.

From here the council can create a working relationship with landlords in the borough. This could be used to provide better information for landlords and agents to ensure that they are compliant with regulations. A way of providing information could be through an online platform,

²⁹⁷ Greater London Authority (2017) *High Streets for all*, London: Greater London Authority

²⁹⁸ Greater London Authority (2017) *Town Centres Supplementary Planning Guidance*, London: Greater London Authority

similar to GetRentr. This is a property tech platform designed to help agents and landlords fulfil their compliance obligations and better serve their tenants. This was created after recognising that landlord regulation is operated independently by each local authority, the company researched every UK local authority website and source of information to determine if they operate PRS licensing schemes and assess the accessibility and volume of online information. It found that Local Authorities in England operate over 500 schemes, with inconsistencies in the information available. GetRentr has aggregated this data and mapped every licensing scheme in the country. Their software automatically tracks new consultations and schemes, and when existing schemes are renewed or expire²⁹⁹. The service informs registered agents and landlords whether properties are compliant with regulation in seconds.

Tenancy options

In term of the supply of the PRS in Brent is at the forefront of the Build to Rent sector with the largest site in the UK. This momentum should be used to create other similar sites across the borough, potentially looking to create properties focused on key demographics such as the elderly.

There is also scope for Brent to try and provide rental properties that charge discounted market rents and also to promote the London Living Rent as a route to home ownership. The Sugar Works development at Royal Wharf, Silvertown, is the first place in London to offer London Living Rent. The L&Q housing association is delivering this and providing 243 London Living Rent homes. Rents in The Sugar Works are up to 50% cheaper than local market rents, leading to savings of between £573 and £1,077 a month for tenants. Tenants are offered a 3 year fixed-term Assured Short hold tenancy with L&Q and towards the end of the fixed-term tenancy, they are given the option to purchase the home at its full market value through Shared Ownership or outright sale, depending on what they can afford³⁰⁰.

Brent should also use planning policies to compel developers to offer longer tenancies with tenant break clauses. Build to Rent developments should offer longer tenancies as standard. This benefits both the developer and the tenants – minimising periods when properties are empty; while also giving tenants the security of a long tenancy in a well-designed and managed home³⁰¹. Some developer-operators are taking the lead, for example Get Living London offer this as standard in their East Village neighbourhood.

Homeshare

Alternative options to building additional homes is to find ways to minimise under occupation in the borough as well as tackle social issues such as social isolation in an ageing population. Homeshare (also known as ‘Host Homes’) brings together two unrelated people to share a home for mutual benefit. Both the Homesharer and Householder have something they need and something they can give to each other. Typically, an older Householder with a room to spare, will be carefully matched with someone who needs low cost accommodation and can provide an agreed amount of support in exchange. The type of support provided might include help with daily tasks such as shopping or enabling reengagement with the local community and social activity³⁰². Homeshare makes effective use of homes that are not fully occupied and offers alternative housing options without relying on increased development or disruption to the borough.

²⁹⁹ Future of London (2017) Engaging London’s Private Rented Sector, London: Future of London

³⁰⁰ L&Q (2018) Get Priced in with L&Q: The Sugar Works at Royal Wharf, E16. Available at: <https://lqpricedin.co.uk/london-living-rent-properties/>

³⁰¹ Future of London (2017) Engaging London’s Private Rented Sector, London: Future of London

³⁰² Sharedlives Plus (2017) The UK Network for Homeshare: Executive Summary 2017. Available at: [Homeshare UK](https://www.sharedlivesplus.org.uk/)

Funded initially by the Big Lottery, Homeshare Isle of Wight was launched in 2017, and is run by, Age UK Isle of Wight, providing the reassurance of thorough vetting (including uptake of references and DBS checks) in order to arrive at compatible, enjoyable and mutually beneficial home sharing matches. Age UK Isle of Wight Homeshare coordinators' work with health and social care colleagues and other Age UK projects, to recruit and thoroughly screen householders and sharers³⁰³. Their role is to guide householders and sharers to arrive at a compatible, lasting and enjoyable blueprint for living together. This takes account of practicalities, personalities, lifestyle and routines.

³⁰³ Homeshare Isle of Wight, Available at: <http://www.homeshareiow.org/>

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Brent Inclusive Growth Strategy (IGS): Infrastructure

2019-2040

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Executive Summary

The next twenty years will bring significant changes to Brent in response to population growth and climate change pressures. In order to accommodate growth, meet environmental requirements, and align with national and local policies in London, Brent must consider the current capacity of existing infrastructure, projected future demands and future policy changes.

The infrastructure chapter of the Inclusive Growth Strategy (IGS) analyses four main sub-themes that will shape future considerations in the borough. Current areas of stress and deficiencies are considered together with the provision of infrastructure capacity related to transport, digital, water, energy and land available to increase future housing and employment density. These sub-themes are analysed in the ongoing report, considering the current situation in Brent and London; its economic and population growth projections; technological changes; environmental requirements and future policy directions at national and local level. Consideration includes Brent's minimum target to deliver 1,525 new homes a year, which has now almost doubled in the Draft New London Plan to 2,915 new homes a year.

Baseline

Headline findings from base analysis of infrastructure provision in Brent include:

- Brent is an Outer London Borough which is well-connected to Central London, but is poorly connected to other Outer London Boroughs, and to London Heathrow Airport, despite relatively close geographic proximity.
- Public Transport Accessibility Levels (PTAL) are higher in identified growth areas, although Church End and Alperton have some lower PTAL areas. The northern part of the borough has an overall lower PTAL.
- Proposed transport projects such as a Crossrail spur from Old Oak Common to stop at Wembley Central station and the West Coast Mainline, and the West London Orbital Line, with stops at Staples Corner, Neasden and Harlesden, would improve business and labour links, accessibility and demand for housing and commercial uses, and improve PTAL and reduce reliance in motorised vehicles.
- There are 92,100 cars registered in Brent with an average 0.7 cars per household.
- 7% of Brent's principle road network length was in poor condition in 2018.
- Compared with Outer London, Brent has the largest percentage of daily trips by public transport, and one of the lowest for motorised vehicles. However, 45% of daily trips in the borough are by car or motorcycle, increasing management pressure of parking spaces, congestion and pollution.
- Only 1% of Brent's commuters preferred transport mode is by bicycle. 12,600 trips are realised in Brent by cycling. Although TfL identified currently Brent's residents could realise more than 300,000 trips by cycling.
- There are 688 plug-in electric vehicles registered in Brent, 0.6% of the total cars, vans and motorbikes licensed in the borough.
- Around 13% of the Electric Vehicle Charging Points (EVCP) in London are provided in Brent, however almost 17% of EVCP have technical problems.
- Brent has the third highest broadband accessibility amongst the West London Partnership boroughs and one of the best in London, though there are some "not-spots" where connectivity is still poor, including Church End and Park Royal. Ultrafast broadband connections are limited or null in most of the borough
- Since 2013 water usage in London is classified with a demand "seriously stressed" designation and Thames Water indicate demand is reaching current available supply.

- Thames Water Corporation data indicates current domestic water consumption is above target levels for new properties, and Brent is also identified as one of the boroughs in London with serious problems of sewer flooding and pollution.
- Over half of energy consumption is in the domestic sector. Brent Council is committed to promote sustainable energy and increased energy efficiencies in the borough, although there is not enough information about current sustainable energy supplied.

Trends

Assessing and planning to meet future infrastructure demands requires analysis of key trends that will shape the future of the UK and London, and resultantly impact Brent's citizens. These trends inform the Responses section of the infrastructure chapter, outlining policy options that can accommodate the infrastructure needs of the growing population and ensure that necessary infrastructure will be provided in Brent to 2040. In the context of the demographic, economic and environmental changes, the IGS identifies the key infrastructure aspects that will affect urban growth in Brent as:

1. Increased demand for public transport
2. Increased cycle and walking transport modes
3. Transportation technology for motorised vehicles
4. Increased technological requirements
5. SMART Infrastructure
6. Growing water demand
7. Increased demand for sustainable energy sources

Responses

This report concludes with proposals that Brent Council could take forward to address the challenges and seize the opportunities in order to provide infrastructure according to the environmental, economic and health requirements of Brent's growing population, aligned with national and local policies in London.

Modal shift away from motorised vehicle use is fundamental. Brent should continue to lobby for better links into HS2, Crossrail and Thameslink networks, and the West London Orbital Railway. In parallel, infrastructure is needed to support and encourage active transport modes – including untapped potential for cycling in the borough – and dialogue increased with TfL and the Mayor through Healthy Streets for London, to improve cycling, walking and bus infrastructure, attract local investment into Brent, and develop already-identified potential new routes and pathways.

Brent has a digital strategy to make Brent a digital place and promote digital inclusion amongst its population. Digital requirements should be embedded within planning policy and regeneration strategies, and private partnerships agreed to rollout of 4G, 5G and superfast/ultrafast broadband. Brent should build on its current pilot of SMART infrastructure to monitor air quality and parking, and embrace the role big data can play in understanding population needs and asset management in an urban environment.

Brent supports Thames Water's plans to provide major new water infrastructure, rollout metering and water efficiency measures, and reduce leaks. Locally, Brent should raise awareness of the need for water efficiency, including options to retrofit existing buildings, use planning policy to secure blue infrastructure and mitigate flood risk, enforce planning and building control regulations for new development, including use of Sustainable Urban Drainage Systems (SuDS) and green roofs, and require water management plans for larger strategic regeneration schemes.

Introduction

Physical and digital infrastructure in Brent is required to underpin minimum projected population and business growth in the area, maintain the wellbeing of the population, and enhance the competitiveness and attractiveness of the borough as a place for its residents, business and entrepreneurs. Infrastructure provision will strengthen Brent's relations with Outer London and the West London partnership.

Special focus is required on current areas of stress and deficiencies in infrastructure capacity related to transport, digital, water, energy and land available to accommodate future housing and employment densities. These sub-themes are analysed within the context of the economic and population growth projections, environmental impacts, technological changes and future policy directions and national and local level in Brent and London. This includes Brent's target to deliver a minimum 1,525 new homes a year, which has almost doubled in the Draft London Plan to 2,915 new homes a year, and the target to convert London to a Zero Carbon city by 2050.

Infrastructure in Brent is analysed with focus on areas that are seeing an increase in residential, commercial and mixed use development, and that have potential to accommodate future growth. Identified growth areas in Brent include Wembley, Alperton, Church End, Burnt Oak/Colindale and South Kilburn, as well as Old Oak and Park Royal. Emerging growth areas identified in the Local Plan preferred options include Northwick Park, Neasden Station and Staples Corner.

The Old Oak Park Royal Development Corporation (OPDC) was founded on 1st April 2015. The OPDC acts as the planning authority for Old Oak and Park Royal, located within Brent, Hammersmith & Fulham and Ealing. The Old Oak and Park Royal opportunity area will have a significant impact on infrastructure demands for Brent, as a result of plans for around 14,000 new homes and 37,000 new jobs for the area. Large scale infrastructure projects such as Crossrail and the new High Speed 2 station in Old Oak Common will help shape London's future. Although this regeneration project is managed by the OPDC, the IGS analyses probable constraints on Brent's boundaries due to expected increase demand for transport, water, energy and digital infrastructure. The investment opportunity that OPDC could bring to Brent is also great, including the potential link to the West Coast Mainline (WCML) at Wembley Central station, and the more general political and developer attention that OPDC is attracting to the area.

The expansion plan for Heathrow is analysed due to the positive economic benefits that could flow to Park Royal, increasing business links and improving international access. This project will require significant new infrastructure to relieve pressure on the public transport network, with an expected increase in public transport demand of more than 250%.

The Wembley area is one of the Mayor's Opportunity Areas for growth with a target for 11,500 new homes and 11,000 jobs to be delivered over the next 15 years, and is analysed due to transformational changes in density that will increase the demand for infrastructure capacity in terms of water, energy, digital connectivity and public transport. Particularly for transport, this report includes the potential development for Crossrail WCML Link station at Wembley Central.

This report is divided into three sections, analysing the main infrastructure capacity and demand pressures currently in Brent, with particular attention to the “growth” areas previously mentioned.

- The first section describes the current baseline information, considering the most up to date information and data available for infrastructure in London and Brent. This section also includes an analysis of Brent compared with Outer London.
- The second section includes trends that may affect the specific sub-themes according to planning policy changes, technological improvements, environmental targets and population and economic growth.
- The third section briefly suggests some policy responses to the challenges and opportunities presented in this report, for measures that could meet future infrastructure requirements and reduce capacity deficiencies.

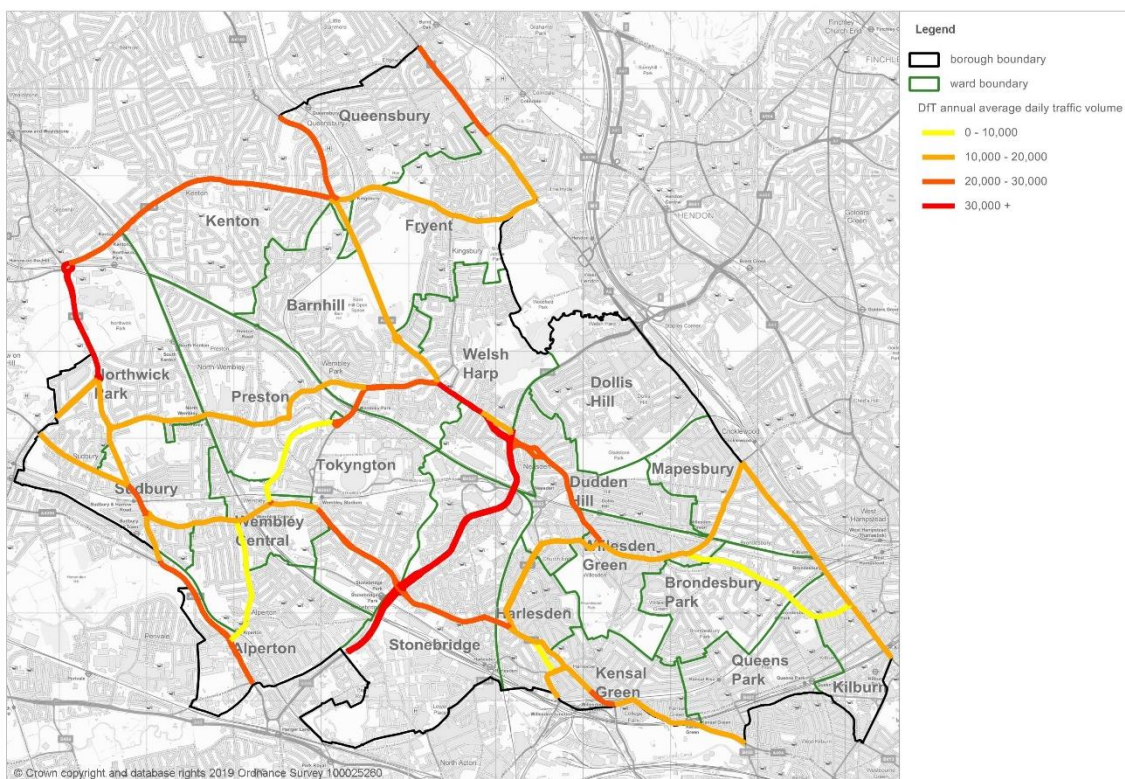
Baseline Transport

Provision of adequate transport infrastructure that considers anticipated levels of population and employment growth is essential in order to reduce environmental impacts, delays to private, business and public transport, and resultant decreases in wellbeing and productivity levels. In London and Brent the main aims for transport infrastructure are to reduce congestion and encourage the use of sustainable modes of transport.

Road Network

Brent is well-connected by road to central and other parts of West London. Average vehicle delays are lower in Outer London than Inner or Central London, although heavy road transport and pockets of localised congestion continue to put pressure upon parts of the borough and network. Traffic congestion is especially concentrated in central wards and along the North Circular Road. High levels of congestion reduce the quality of life of Brent residents and have a negative effect on economic growth. The map below shows daily traffic flow, where red indicates the most congested roads (Figure 132).

Figure 132: Annual Average Daily Traffic Volume All motor vehicles

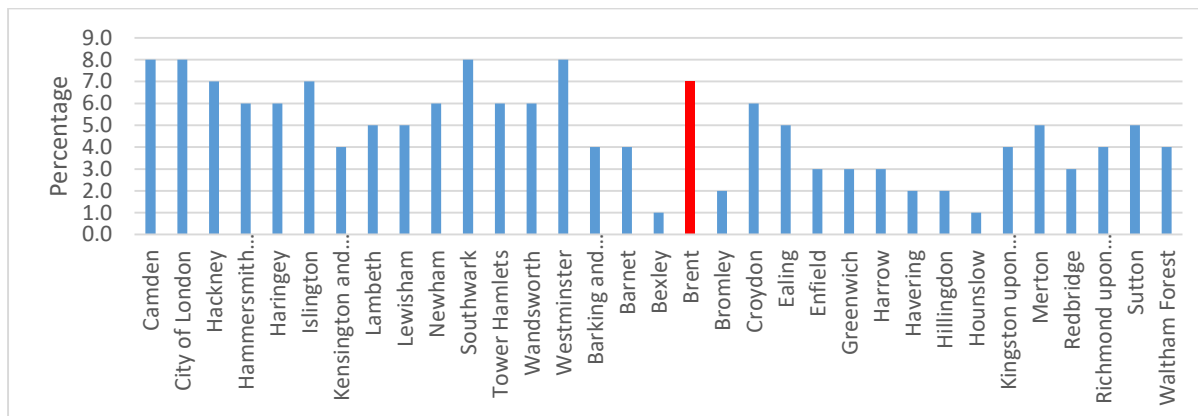


Source: Ordnance Survey

To reduce congestion in Brent it is important to encourage alternative sources of transport, and provide adequate road network maintenance. Brent has recently improved the condition of its highway assets, which is important for freight services that rely on this network and serve a number of industrial estates located in Brent. In 2013 around 40% of main roads were in poor condition, but this dropped to 21.6% in 2016, and only 7% in 2018. Brent still

however has a higher percentage of road network in poor condition compared with some London boroughs. (Figure 133).³⁰⁴

Figure 133: Highway Asset Condition – % of principal road network which requires maintenance 2017/18.



Source: Department for Transport statistics (2019)

Cars

In London, the increasing use of private cars and reduction of road space are the main causes of congestion, a problem that costs £4 billion a year to the UK economy. In 2012 air pollution had a total cost of up to £2.7 billion, impacting UK productivity³⁰⁵. Strategic solutions are needed to reduce traffic and congestion, improve sustainable modes of transport, and provide alternatives to motorised vehicles, in order to reduce these significant costs to the economy.

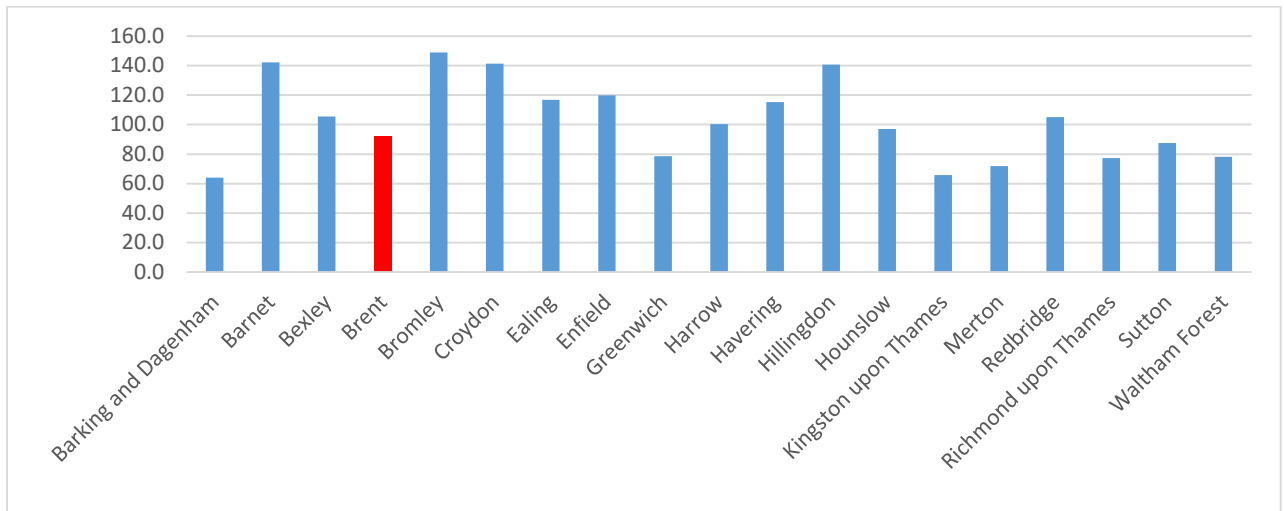
In 2017, there were 2.6m cars registered in London, 73% of which were registered in Outer London and 3.4% registered in Brent. Brent has the 12th highest cars registered out of the Outer London boroughs (Figure 134)³⁰⁶ however this number has increased considerably between 2012 and 2016 and fallen slightly since then (Figure 135).

³⁰⁴ TfL (2017) Travel in London 9 & TfL (2017) Borough Local Implementation Plan (LIP) performance indicators. *Department for Transport statistics (2019)*

³⁰⁵ DEFRA & DT (2017) UK plan for tackling roadside nitrogen dioxide.

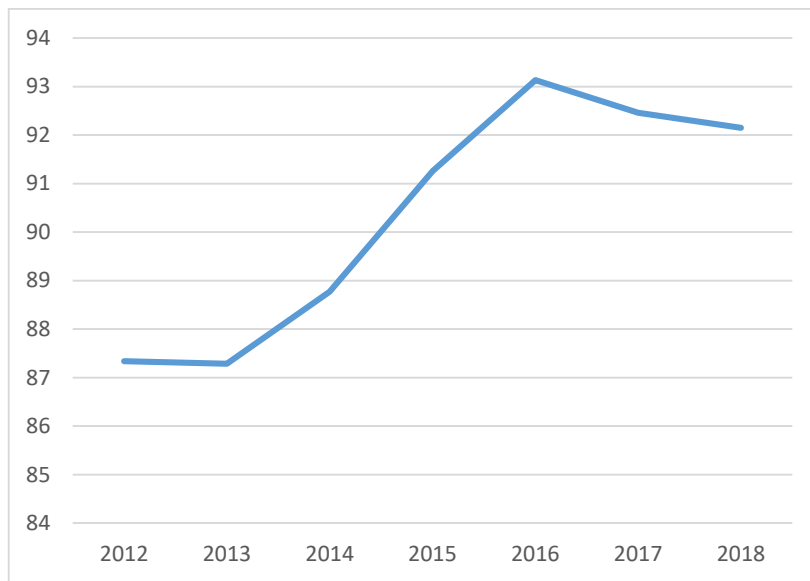
³⁰⁶ DfT (2018) Number of Licensed Vehicles 2017.

Figure 134: Cars registered 2018 Outer London (000s)



Source: Department for Transport Statistics Vehicle Licensing Statistics 2019.

Figure 135: Number of Licensed Cars Registered in Brent



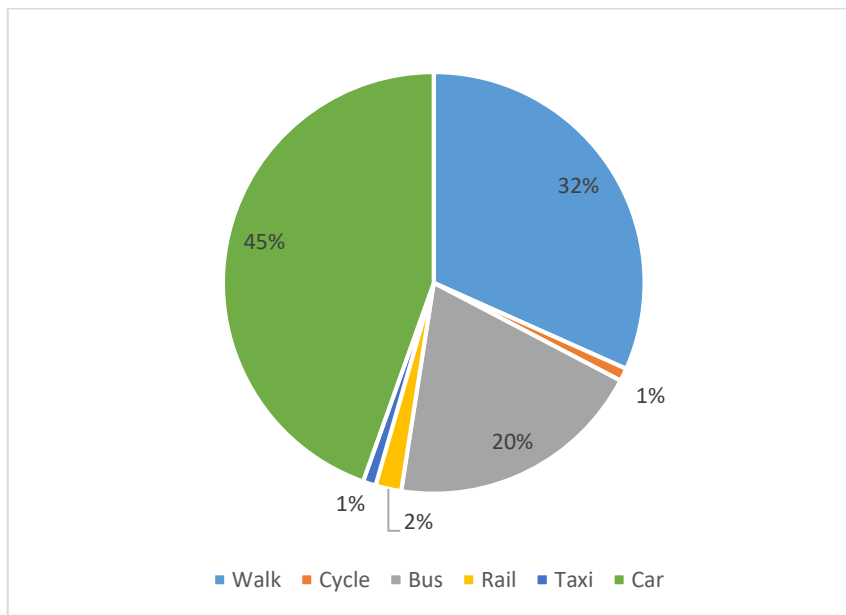
Source: Department for Transport Statistics Vehicle Licensing Statistics 2019.

Compared with Outer London, Brent has the largest percentage of daily trips by public transport (Rail, Underground, Bus), and one of the lowest for motorised vehicles. From 565 daily trips realized in the borough, 45% are made by private motorised vehicles, 20% by bus, 32% walking and only 1% cycling (Figure 136).³⁰⁷ In comparison to London as a whole, a lower proportion of trips are by car (35%) and by walking (25%).³⁰⁸

³⁰⁷ TfL (2017) Travel in London 9 supplementary information & TfL (2017) Borough Local Implementation Plan (LIP) performance indicators.

³⁰⁸ TfL (2018) Travel in London Report 11

Figure 136: Modal Split 2017

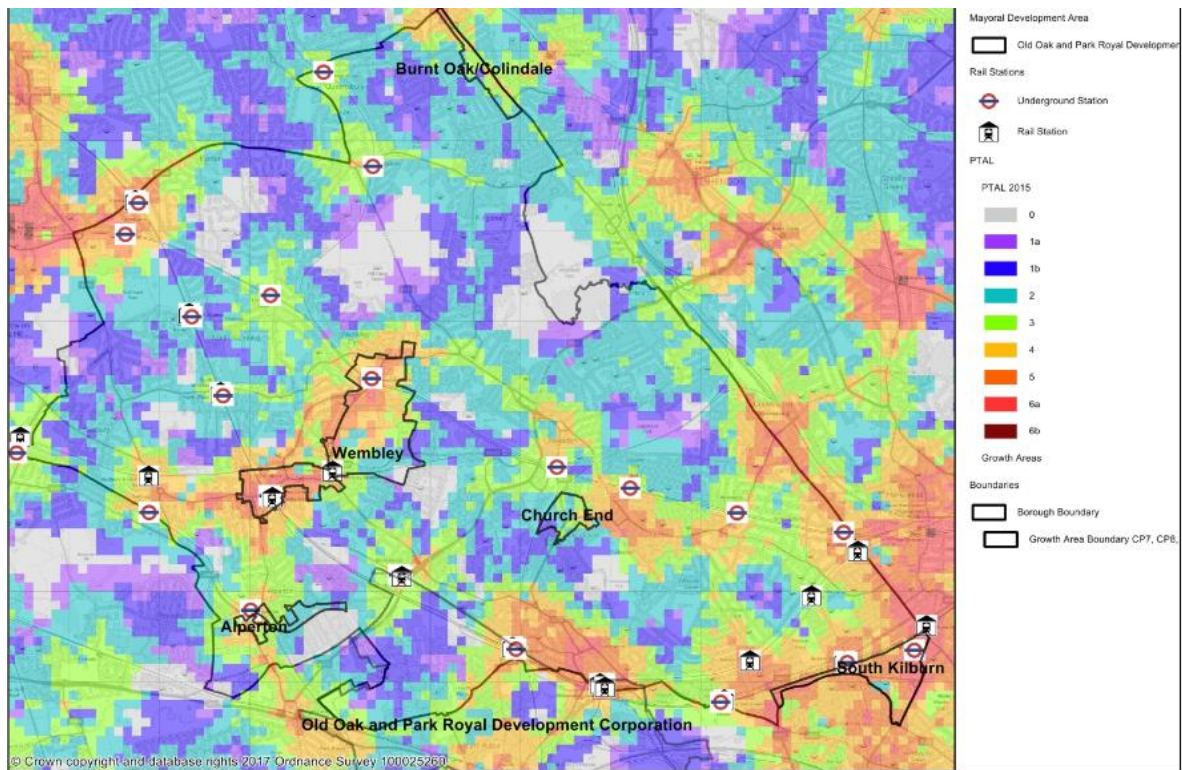


Source: Brent Local Implementation plan 2018

Public Transport

Car dependency can be reduced when people are offered efficient public transport alternatives. Although London's transport network is controlled and financed by Transport for London (TfL), the Council can seek to manage the location of new developments. In Brent, identified growth tend to have the highest Public Transport Accessibility Level (PTAL) levels, particularly around Wembley and in the southern part of the borough. Burnt Oak/Colindale also has good PTAL around 3, as does Church End and Alperton, although these latter two areas have some areas with lower PTAL around 2 and 1 (Figure 137).

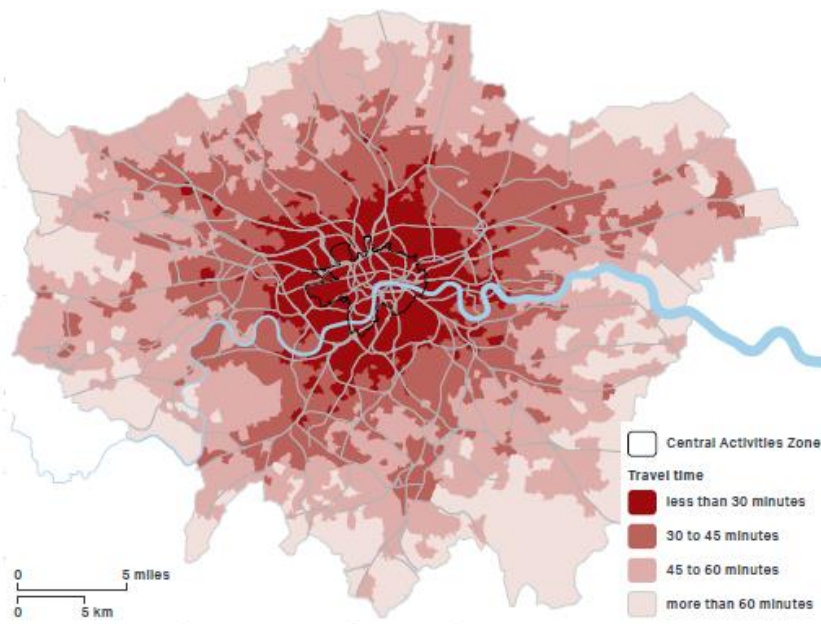
Figure 137: Brent's PTAL 2015



Source: Ordnance Survey

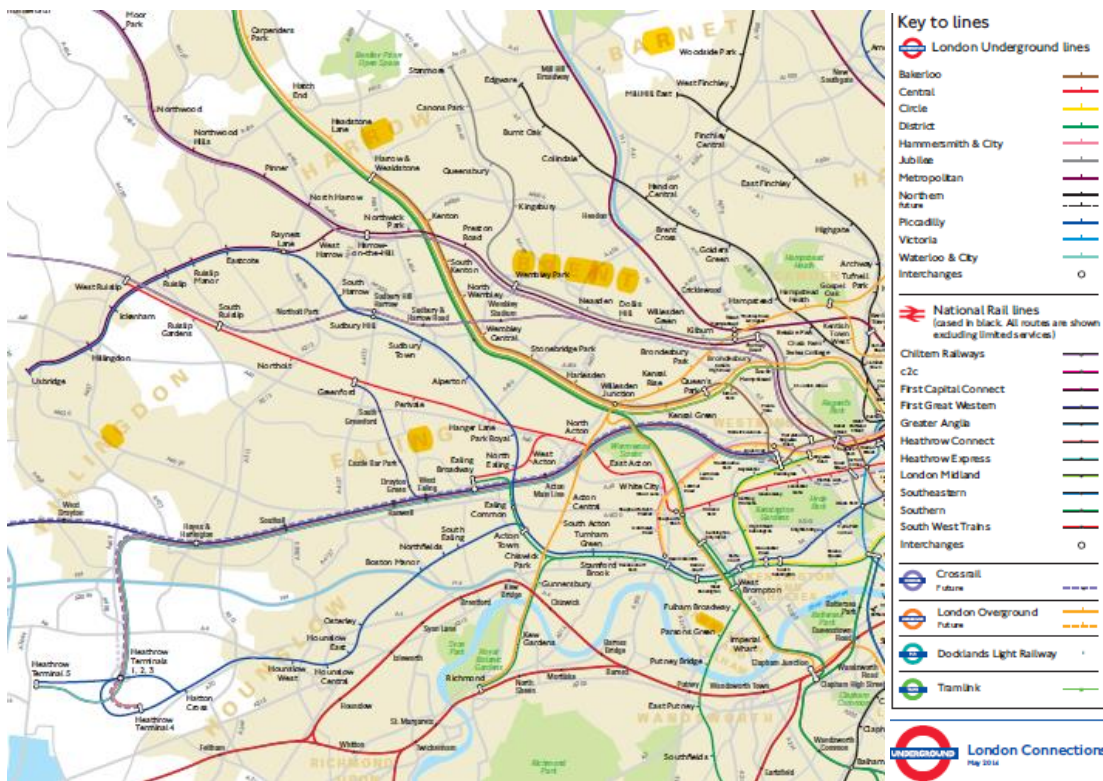
Brent is one of the Outer London Boroughs with higher accessibility by public transport (Figure 138). Brent is well connected to Central London, however is poorly connected to Outer London Boroughs, and to London Heathrow Airport, despite relatively close geographic proximity. Brent is therefore seen to have strong radial public transport links to Central London, but much weaker local orbital ones to the other West London boroughs. The proposed West London Orbital line therefore offers great potential to address these weaker orbital links. Brent is currently connected with the West and Outer London only through orbital road routes such as the A406 (North Circular Road), A4006 (Kingsbury Road) and A417 (Sudbury Court Drive), and improved bus routes and frequency would also help strengthen orbital transport links (Figure 139).

Figure 138: Public Transport Travel Time to the Central Activities Zone, 2015



Source: GLA (2018) Mayor's Transport Strategy

Figure 139: Central and West London underground and line connections map



Source: TfL (2014) London connections map

Public transport in Brent includes:

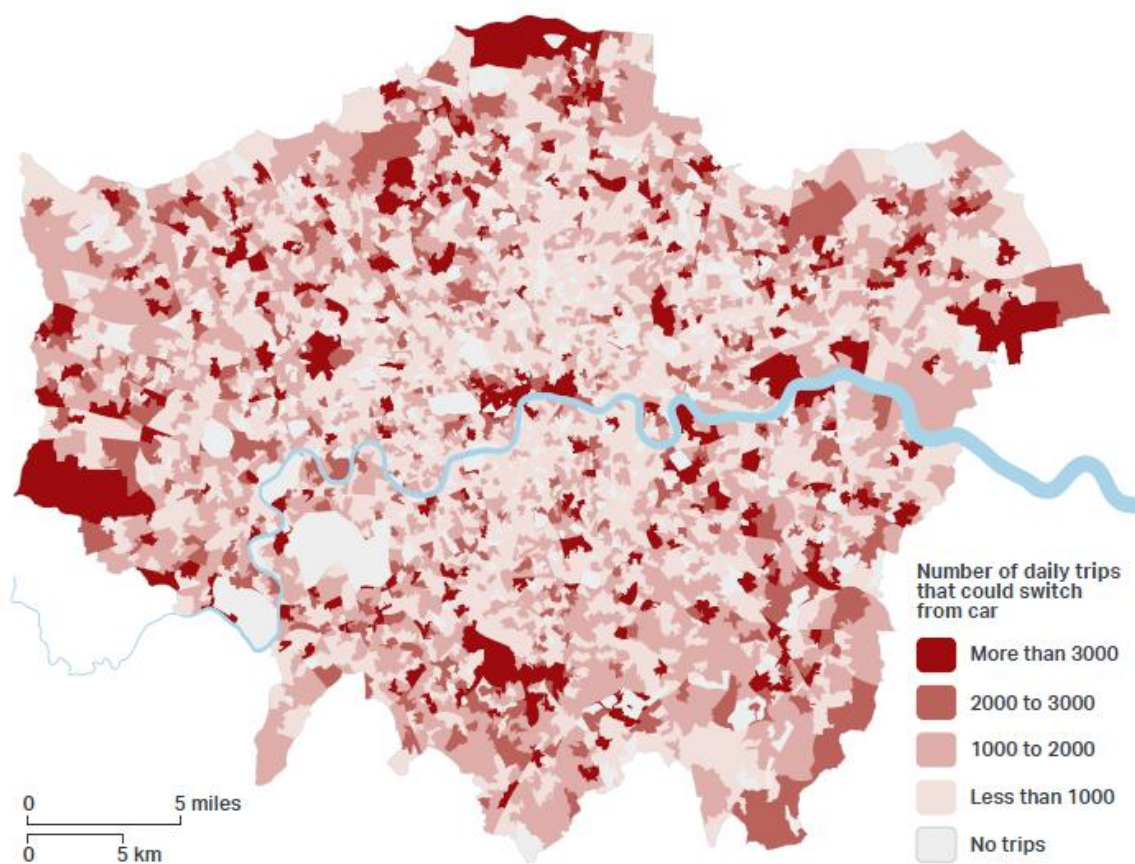
- 58 bus routes, 7 of which are night buses.
- 25 Underground stations, with currently only 3 stations with step free access at Wembley Park, Kingsbury, and Kilburn (and step free access now planned for Park Royal). Brent

has direct access to Jubilee, Piccadilly, Metropolitan and Bakerloo Underground lines. Jubilee line with night service during weekends.

- 3 Overground stations with access to Euston-Watford Junction and Richmond/Clapham Junction Overground routes.
- 4 National Rail stations offering direct links to Marylebone and out-lying destinations such as Birmingham/High Wycombe.

According to recent TfL analysis, an important proportion of residents in Brent could switch journeys currently made by car to journeys by foot, bicycle or by public transport, particularly for short trips (Figure 140)³⁰⁹.

Figure 140: Volume of car trips that could be made by walking, cycling and public transport



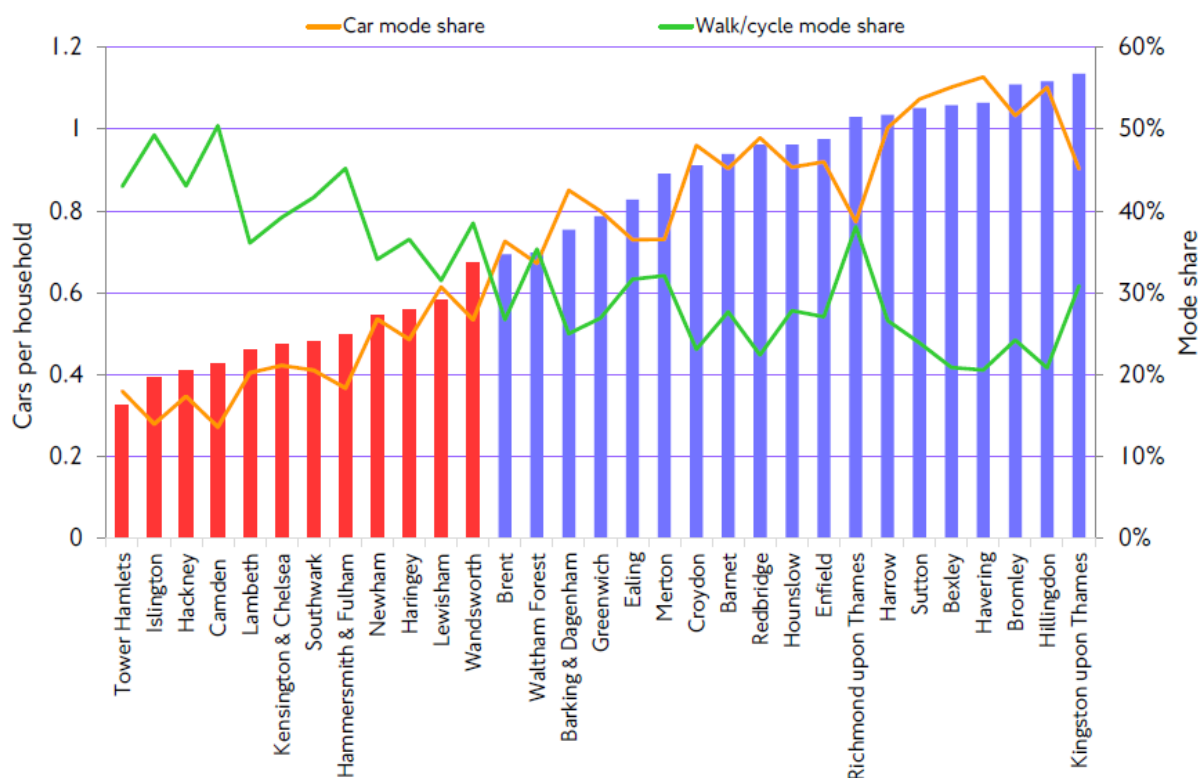
Source: GLA (2018) Mayor's Transport Strategy.

³⁰⁹ TfL (2017) Transport Classification of Londoners and GLA (2017) Mayor's Transport Strategy.

Cycling

Cycling in London has grown significantly over the past 15 years. There are now more than 670,000 cycle trips a day in London, an increase of over 130% since 2000. However, car dependency is higher in Outer London when compared with Inner London, and the numbers of trips by bike are lower (Figure 141)³¹⁰. Although, there are some boroughs such as Richmond upon Thames with cycle levels above 7%, in Brent only 1% of trips are realised by this mode.³¹¹

Figure 141: Car ownership rates by borough of residence. Average number of cars per household, car mode shares and active travel mode share compared, 2013/14-2015/16.



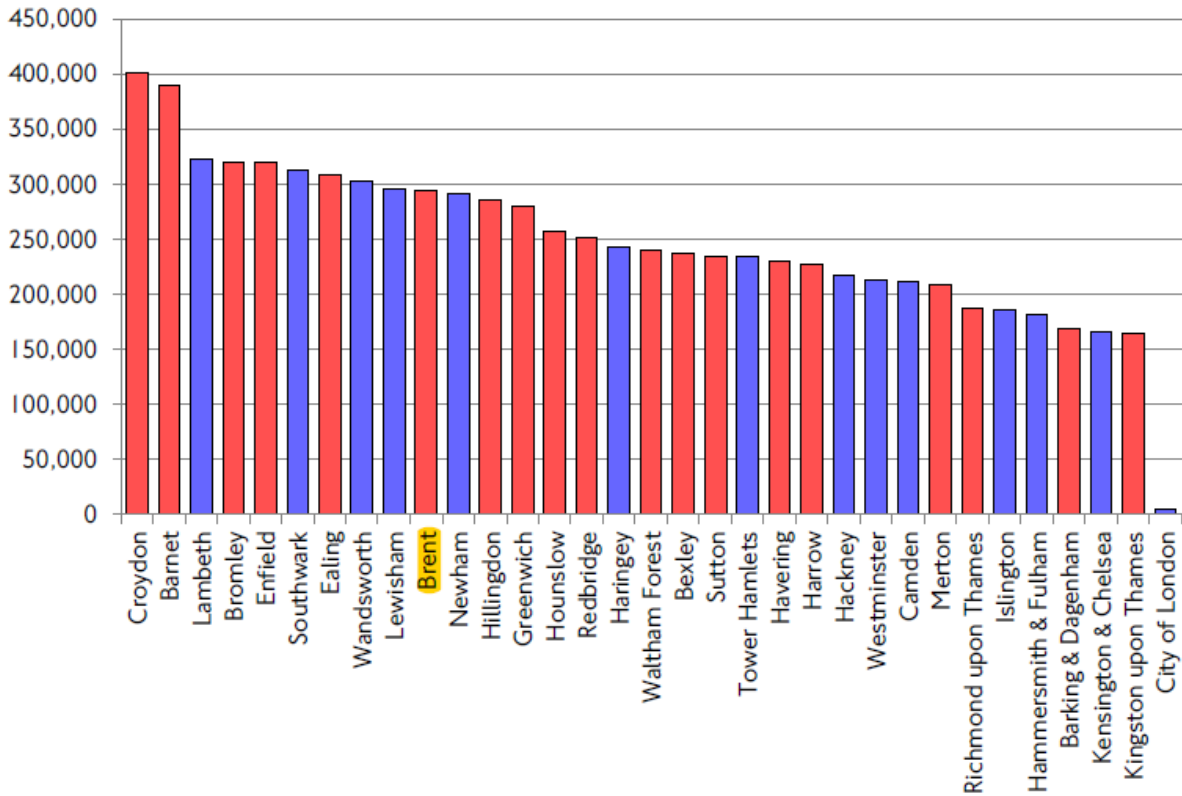
Source: TfL (2017) Travel in London 9 supplementary information.

Londoners make 8.17 million daily trips by motorised modes that could instead be made by bike. Current National and Local policies encourage cycle trips, rather than use of motorised vehicles. TfL recently evaluated cycle behaviour in the city to identify opportunities to increase the rates of cycling. TfL indicate that in Brent only 12,600 trips were realised by cycle, though cycling has potential to realise almost 300,000 trips by bike. Compared with Outer London, Brent is the borough with the 6th highest potential to increase its daily cycle-able trips (Figure 142).

³¹⁰TfL (2017) Travel in London 9 supplementary information & TfL (2017) Borough Local Implementation Plan (LIP) performance indicators.

³¹¹TfL (2017) Borough Local Implementation Plan (LIP) performance indicators & London Datastore (2014) Travel to Work by Bicycle. Brent Local Implementation plan 2018

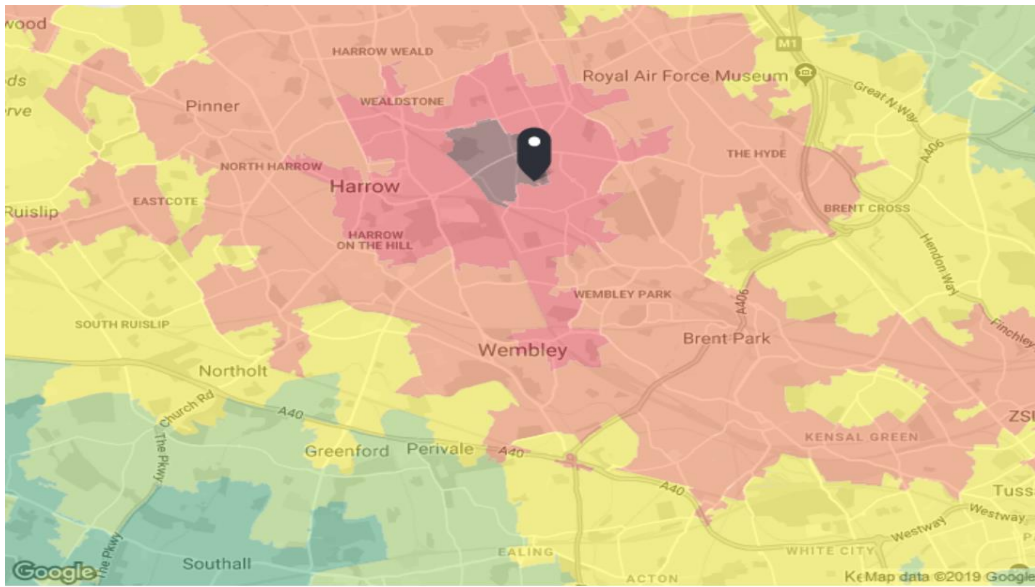
Figure 142: Potentially cyclable trips by borough of residence



Source: TfL (2017) Analysis of cycling potential 2016

Public transport is a preferred alternative to discourage the use of private cars, however as TfL control investment, Local Authorities have little control over improving infrastructure. Instead Local Authorities can focus on improving and promoting green transport models in areas with lower PTAL levels and for short trip distances. The case map below analyses areas with PTAL between 0 and 2 within Kenton with the potential to develop walking and bicycle trips (Figure 143).

Figure 143: Kenton TIM 2019

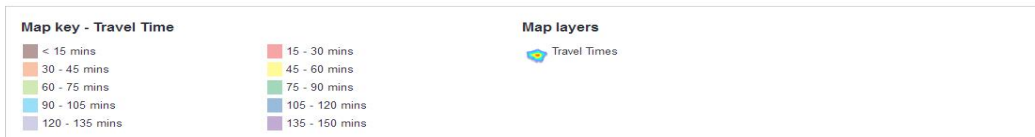


TIM output for Base Year

Scenario: Base Year Mode: All public transport modes, Time of day: AM peak, Direction: From location

HA3 0LT
 Ebrington Rd, Harrow HA3 0LT, UK
 Easting: 517747, Northing: 188253

Code: NT086A05A

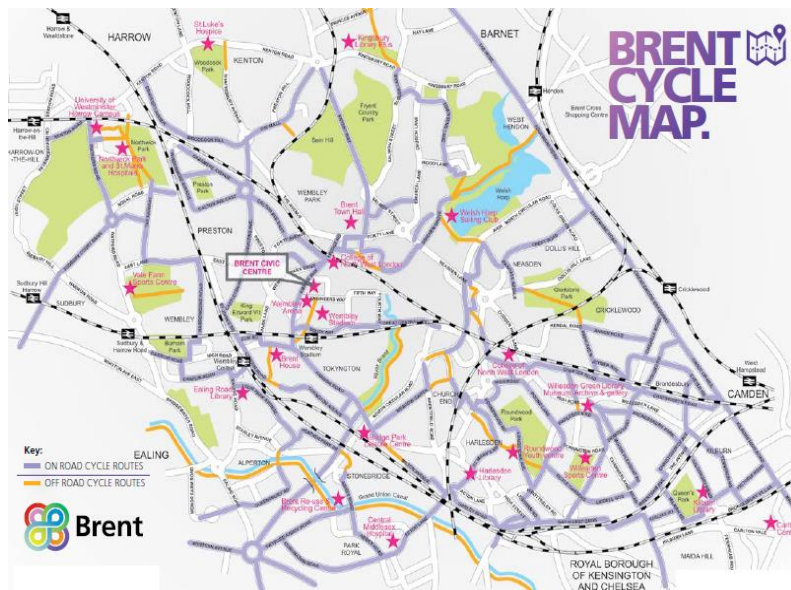


Source: TfL (2019) WebCAT

Brent provides some cycle parking facilities located close to public transport and cycle pathways, as well as some cycle pathways (Figure 144)³¹²

³¹² Brent (2017) Brent your guide to Cycling in Brent.

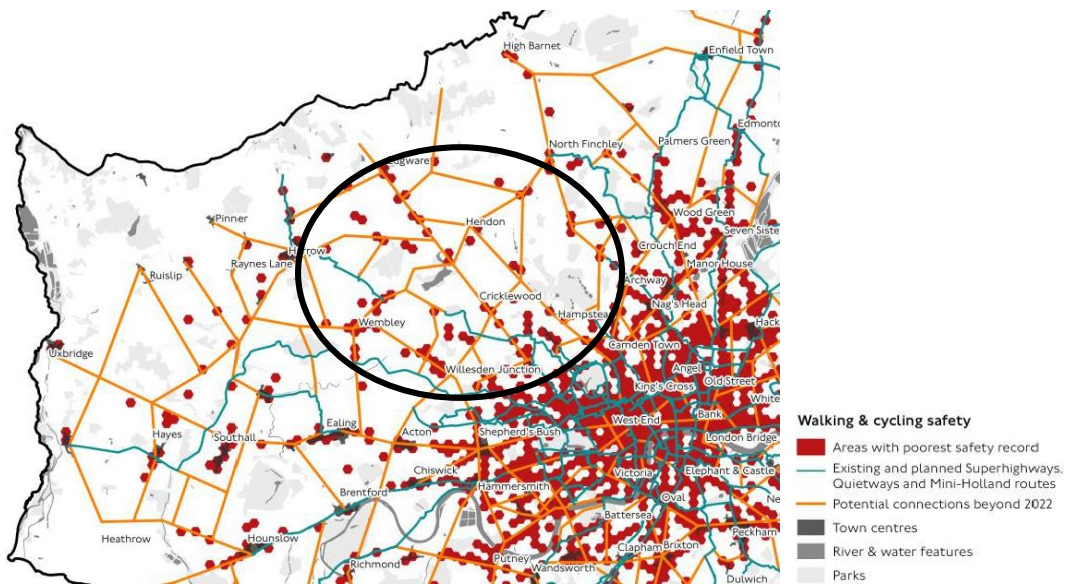
Figure 144: Brent Cycle Map



Source: Brent (2017) *Brent your guide to Cycling in Brent*.

Survey data indicates the most frequent reason that discourages people from cycling in London is concern about road safety and the probability of having a collision³¹³. Recent TfL analysis of walking and cycling infrastructure, shows Wembley, Cricklewood and Willesden Junction are located within areas with the 20% poorest safety records in London, based on the total number of collisions involving people walking or cycling (Figure 145). Similarly, on this analysis, TfL identified Wembley and Cricklewood in the top percentage of areas with higher growing population and employment in London, highlighting the importance to increase current levels of safety to encourage the use of green modes of transport.³¹⁴

Figure 145: Walking and cycling safety in London



Source: TfL (2017) *Strategic Cycling Analysis*.

³¹³ Brent (2016) *Brent Cycle Strategy 2016-2021*

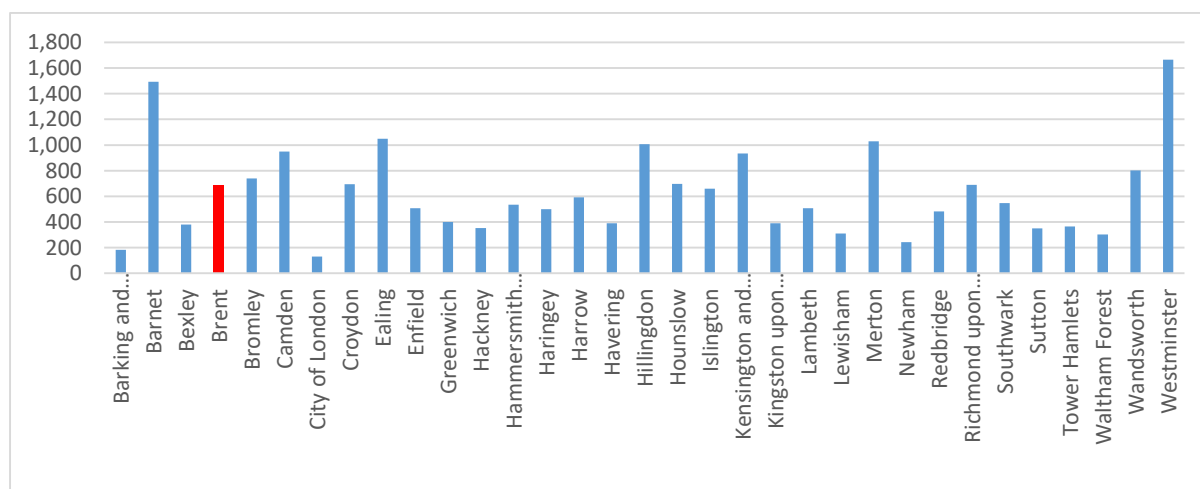
³¹⁴ TfL (2017) *Strategic Cycling Analysis: identifying future cycling demand in London*.

Electric Vehicles

Since 2011, the UK government has implemented a programme to improve air quality generated by motorised vehicles, promoting the use of clean technologies such as charging stations for Ultra Low Emissions Vehicles (ULEV). This program includes infrastructure for buses, vans and cars that are electric or hybrid.

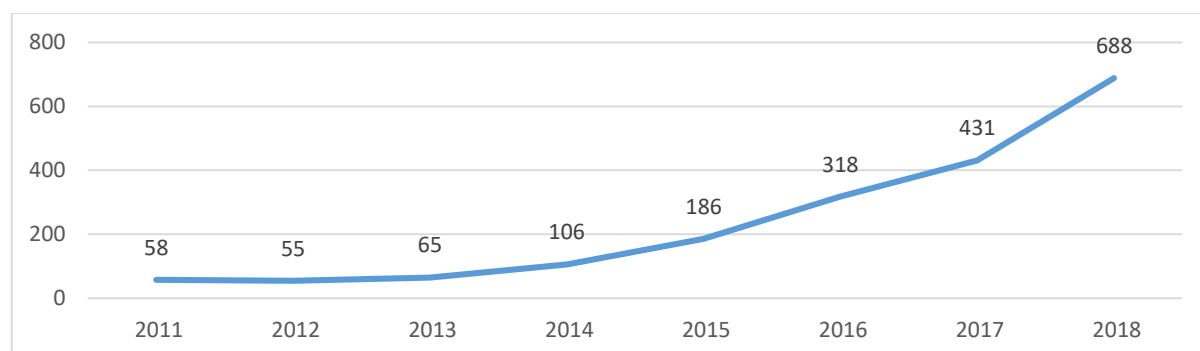
Brent has the 10th highest number of plug-in vehicles in London with 688 registered at the end of 2018 (Figure 146) which has increased by 679% since 2011 and makes up 0.6% of the total number of vehicles registered in Brent (Figure 147).

Figure 146: Plug-in vehicles registered in London 2018



Source: DfT (2019) Vehicle licensing statistics

Figure 147: Plug-in vehicles licensed registered in Brent

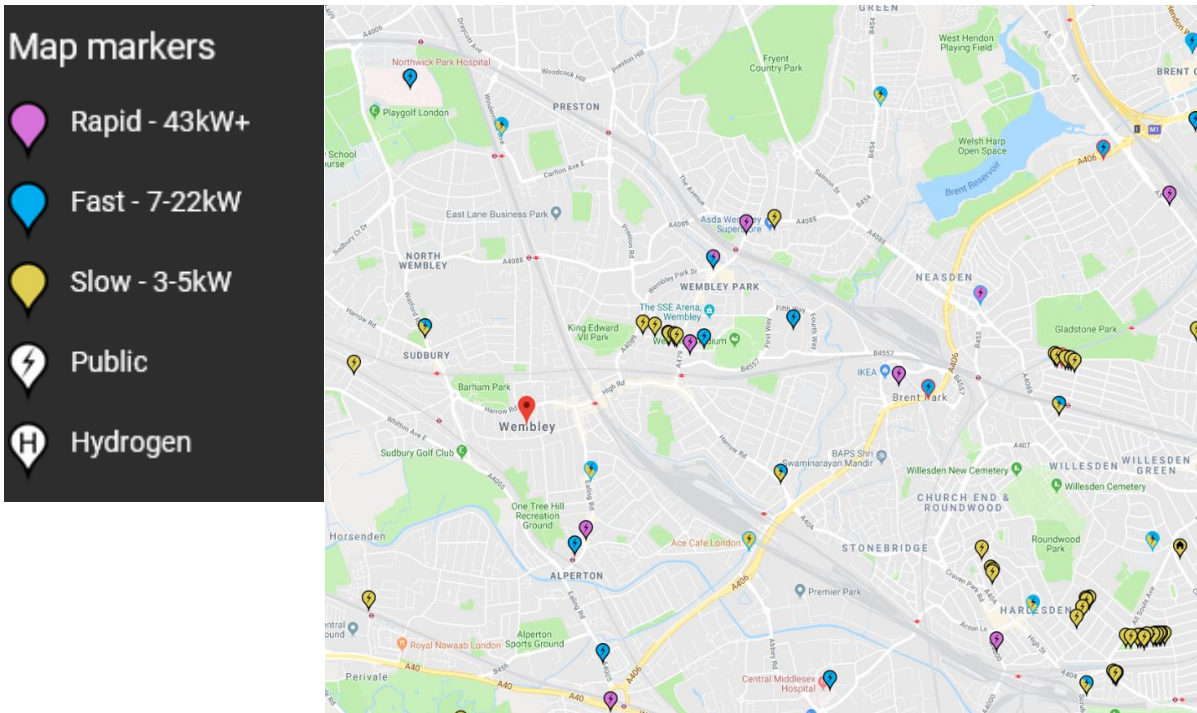


Source: DfT (2019) Vehicle licensing statistics

In 2017, Brent Council installed 33 charging points for electric cars in 24 locations. According to the online platform EVCPs zap-map, Brent has 13% of the connectors available in Greater London. 74 charging points in 13 locations mainly in supermarket areas, such as Morrisons and Costco circled in purple in the map below (Figure 148). Of the current EVCPs, 19% are out of service or have performance issues reported, including the five stations located at Wembley Stadium.³¹⁵

³¹⁵ Zap-Map (2018) Consulted 8 January 2018

Figure 148: Electric Vehicle Charging Point (EVCP) Locations



Source: Zap-Map (2019)

	SLOW 3kW	FAST 7 kW	RAPID 50kw	SUPER 120kw	HYDROGEN	TOTAL
Available to use	8	52				60
Reported issue		1				1
Out of service	4	7	2			13
TOTAL	12	60	2			74

Source: Zap-Map (2018) Consulted January 2018

Charging points at Brent can provide full daily charge for 265 to 469 EV users³¹⁶. This capacity and charging time associated with EVCP depends on the power level associated in Brent as is shown in Figure 149:

- 3kW provide a full charge between 7 and 8 hours and is most suited for overnight charging at or near home or work. With capacity for 1 or 2 users in a 24 hour.
- 7kW typical full charge electric vehicles in 3-4 hours, meaning that 3 or 4 users a day could fully charge.
- 50kW a higher power rapid charging option ideal to charge EV quickly, provide full charge between 30 and 40 minutes, allowing between 36 and 48 users per day³¹⁷.

Figure 149: Power Level EVCP in Brent

	3kW	7kW	50kW
Subtotal	12	60	2
% Total EVCP	16%	81%	3%

Source: Zap-Map (2018) Consulted 8 January 2018

³¹⁶ Scenario considering all the 74 EVCP at Brent available to use.

³¹⁷ TfL (2017) Electric vehicle charging infrastructure: Location guidance for London.

In addition to the charging stations, there are 6 off-street parking spaces provided exclusively for electric vehicles. There are also 47 off-street parking spaces provided for electric vehicles in Brent Civic Centre, available as general parking when not in use for vehicle charging. Electric vehicle parking is very limited in comparison with the infrastructure and off-street parking spaces for standard motorised vehicles (Figure 150).³¹⁸

Figure 150: Brent’s off-street parking spaces

Normal Car	650
Electric Vehicles	53

Source: Brent (2018) Parking Annual Report 2017-2018

Funding and securing electrical connections is one of the biggest barriers to maintaining and installing new EVCPs.³¹⁹ Investment requirements depend on the type of charging point and location³²⁰:

- Public on-street EVCPs cost in the region around £6k - £10k for installation and equipment.
- Private off-street EVCPs, costs are generally between £0 – £2.5k for installation and equipment.
- Cost of electricity averages £1.80 per charge (60 miles) for a standard domestic rate.

Parking

Demand for parking is high in Brent. Although the Council has introduced a number of parking control measures, due to current levels of car traffic and with limited space available, the pressure to manage kerb space is noticeable.

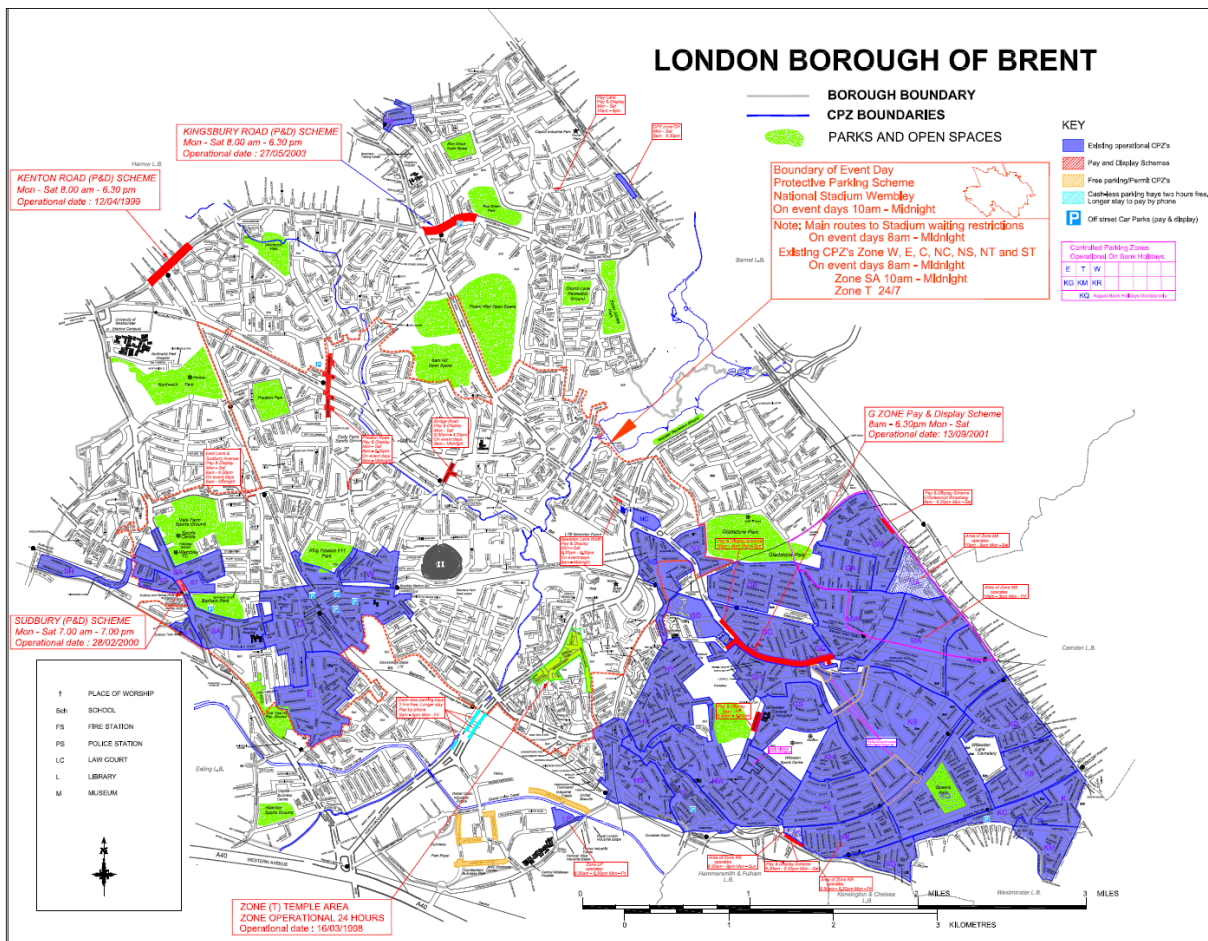
Parking management is delivered in partnership with Serco, a private company that provides services such as off-street parking enforcement; CCTV for public space and traffic enforcement; vehicle removal; pay and display machine maintenance and cash collection; and provision of parking IT and back office services. On-street parking spaces are managed through 40 Controlled Parking Zones (CPZs) across Brent (Figure 151). With operation times specific to location, 33,000 parking spaces are provided serving 56,000 households.

³¹⁸ Brent (2016) Parking Strategy 2015.

³¹⁹ Brent (2016) Cabinet Report from the Strategic Director Regeneration and Environment.

³²⁰ RGP (2017) Electric Vehicle Charging Points.

Figure 151: Controlled Parking Zones



Source: Brent (2018) *Parking Annual Report 2017-2018*

Overall, CPZs are designed to prevent commuters from parking in residential streets, and to encourage them to instead use pay and display facilities or use alternative means of transport. A recent parking consultation expressed views to extend current CPZs and loading restrictions, interventions that are currently considered by the Council for implementation mainly in areas with high level of public transport accessibility.³²¹

Parking permits are issued in CPZs according to the type of user. Permit price goes up with 1) higher emissions, 2) additional permits per household. Priced parking, particularly in CPZs and areas with good public transport, is designed to discourage car use and remove disincentives to use public transport. The 35% drop in visitor parking permits between 2016 and 2018 (Figure 152) is considered a result of the parking service introducing new visitor parking charges in all Controlled Parking Zone (CPZ) areas 29th November 2016 in an effort to reduce excess demand for parking spaces.³²²

³²¹ Brent (2017) *Parking Annual Report 2016-2017*.

³²² Brent (2018) *Parking Annual Report 2017-2018*

Figure 152: Brent Parking permits in CPZ

Permits Issued	2014/15	2015/16	2016/17	2017/18
Resident Permit	34,427	31,132	31,098	33,450
Visitor Parking	411,000	451,000	420,000	272,000
Business Permits	627	589	691	788
All Other Permits	5,164	5,140	5,095	-

Source: Brent (2018) Parking Annual Report 2017-2018

Digital

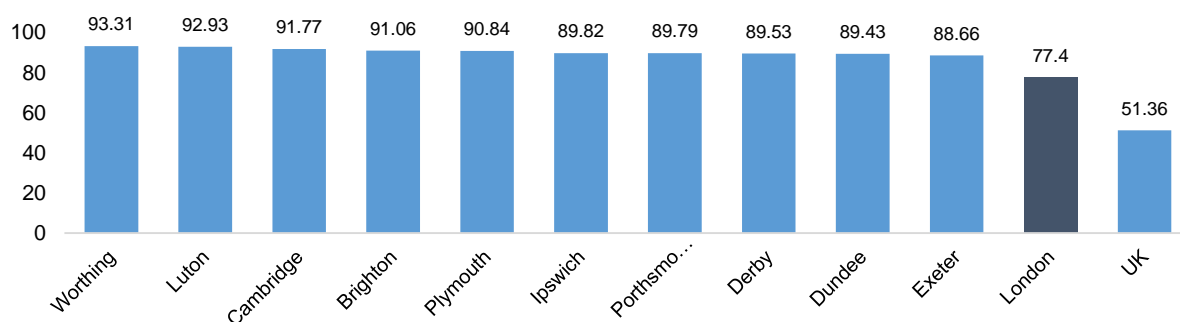
Accessibility to technology is a crucial influence in people's lives; connectivity drives productivity and innovation. In order to realise the benefits of technology in Brent, it is important to ensure access to digital infrastructure that meets the requirements of residents and businesses located in the borough. Digital capacity includes broadband connections, speeds, Wi-Fi public hotspots, and self-service terminals.

The Universal Service Obligation (USO) introduced in 1984 has as its aim to ensure that basic fixed line telecom services be made available at an affordable price to all UK customers. This basic line considers broadband technology below 10Mbps: technology that is still limited, to cover the basic needs of business and entrepreneurs working in a global environment.

In London, the development of optical fibre has considerably increased broadband speeds above the USO minimum, allowing more places to be connected with access to superfast (above 30Mbps) and ultrafast (above 100Mbps) broadband. However, there are places in London that still have poor digital connectivity, a situation that limits city economic productivity, international competitiveness and new investment.

London ranked 30 amongst 63 surveyed cities in 2016, with 77.4% of properties in general covered by ultrafast broadband, above the national average of 51.4%, but below cities with a lesser number of residents and business (Figure 153)³²³.

Figure 153: Percentage of premises covered by ultrafast broadband (>100 Mbps) at the end of 2016.



Source: Thinkbroadband.com and Centre for Cities in London Assembly (2017) Regeneration Committee: Digital Connectivity Report.

In July 2018, Central Government set a goal of delivering full-fibre to 15 million premises by 2025 with delivery to all premises by 2033³²⁴. Full-fibre broadband coverage in the UK has risen since to around 7% of premises in Spring 2019, an increase of over 300,000 premises, an increase of 4% since 2017. This increase mainly reflects the commercial roll-out of Fibre to the Property (FTTP) by BT Plc, Virgin Media and KCOM and a range of other providers including Hyperoptic, CityFibre and Gigaclear³²⁵.

³²³ London Assembly (2017) Regeneration Committee: Digital Connectivity Report.

³²⁴ Ofcom (2018) Connected Nations

³²⁵ Ofcom (2019) Connected Nations Update

IT operators in UK have completed implementing a major 4G rollout programme and the coverage of these higher-speed data services has increased significantly, with geographic coverage from all operators. The launch of 4G voice call services by EE and Three has had a beneficial effect on their voice network coverage, in particular by improving indoor coverage.

In 2018, the Government had achieved its goal of 95% superfast broadband coverage for homes and businesses in the UK with the support of BT Plc. In Brent, broadband capacity significantly improved over 2016 and 2017 as a result of £50m BT Plc investment to deploy fibre broadband in the borough³²⁶. BT Plc investment increased connection speeds, widening accessibility to broadband over 30Mbps from 92.8% to 99% of hotspots. After this investment, Brent reached the third highest broadband accessibility amongst the West London Partnership (Figure 154) and one of the best in London (Figure 155).

Figure 154: BT Superfast Broadband access (>30Mbps) 2015/2017 across West London Partnership

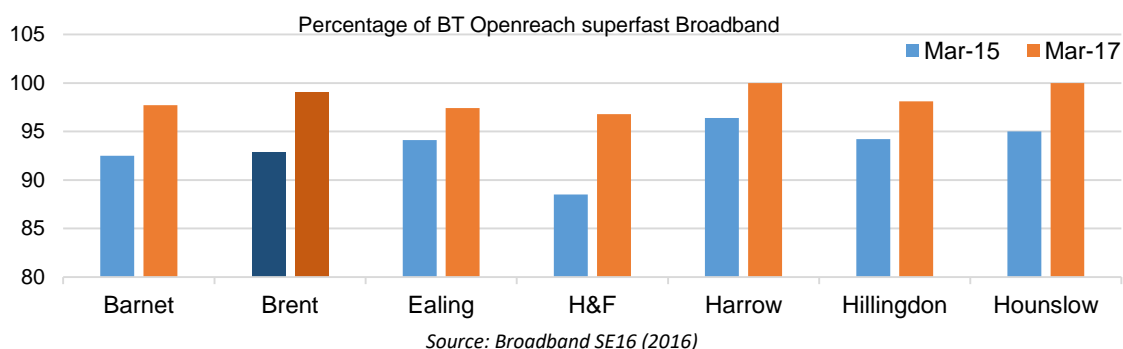
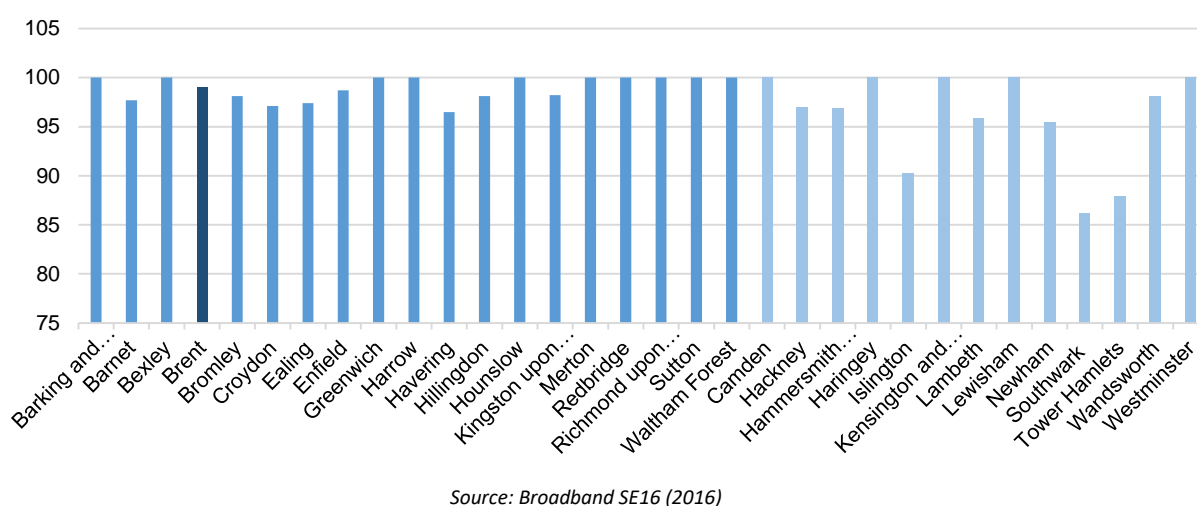


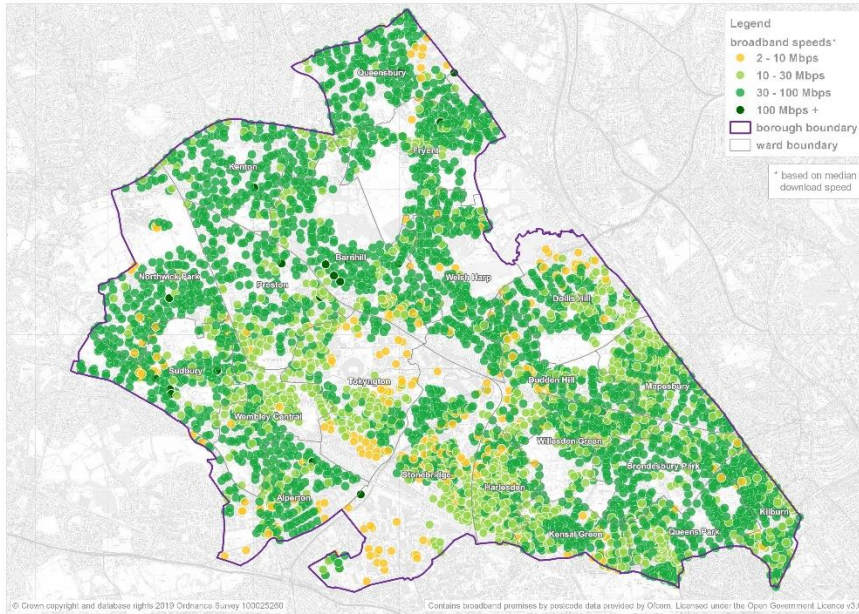
Figure 155: Percentage of BT Superfast Broadband in London (March 2017)



Although this investment increased the competitiveness of Brent among other boroughs, there are ‘not-spots’ where connectivity is still poor, shown as red dots on the map below. Areas with low connectivity include “growth” areas expected to accommodate new housing and employment such as Wembley, Burnt Oak/Colindale and OPDC, where requirements for faster broadband could be higher than in other parts of the borough (Figure 156).

³²⁶ Brent & Kilburn Times (2015).

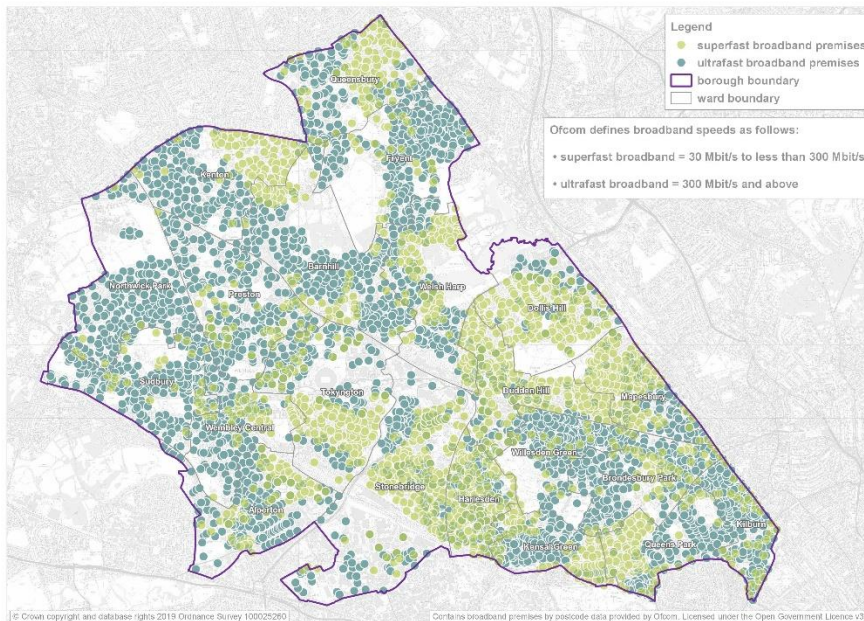
Figure 156: Broadband speeds by postcode in Brent 2016



Source: Ordnance Survey.

Ultrafast broadband connections are limited or null in most of the borough. The map below includes future investments in ultrafast broadband technology (>100 Mbps), and show ultrafast coverage only in the areas of Wembley and Alperton. Important hubs of employment such as Park Royal are not included (Figure 157).

Figure 157: Ultrafast Broadband Premises in Brent 2016.



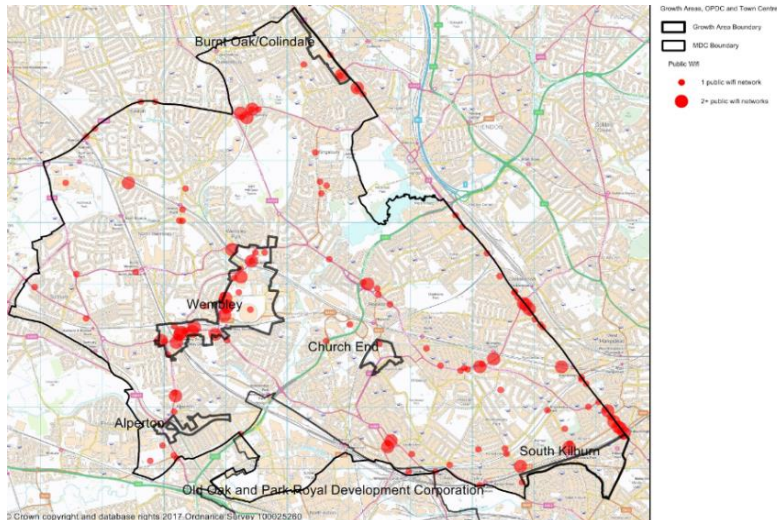
Source: Ordnance Survey.

SMART City strategies integrate big data understanding, physical infrastructure and digital infrastructure. SMART Cities aim to solve cities challenges, create a better environment for the future, and deliver resources efficiencies and better capital asset management. Brent Council's Digital Strategy seeks to align with the London SMART Cities agenda, and plans for

digital infrastructure for the borough from 2017-2022. The strategy aims to improve access to information and services to ensure digital inclusion for all Brent's residents and businesses.

All Council services are currently accessible online, and 61% of Brent households have an account. Digital access in Brent still has deficiencies however, such as: limited free Wi-Fi spots (Figure 158), and broadband speeds that limit business development (Figure 156).³²⁷

Figure 158: Public Wi-Fi in Brent.



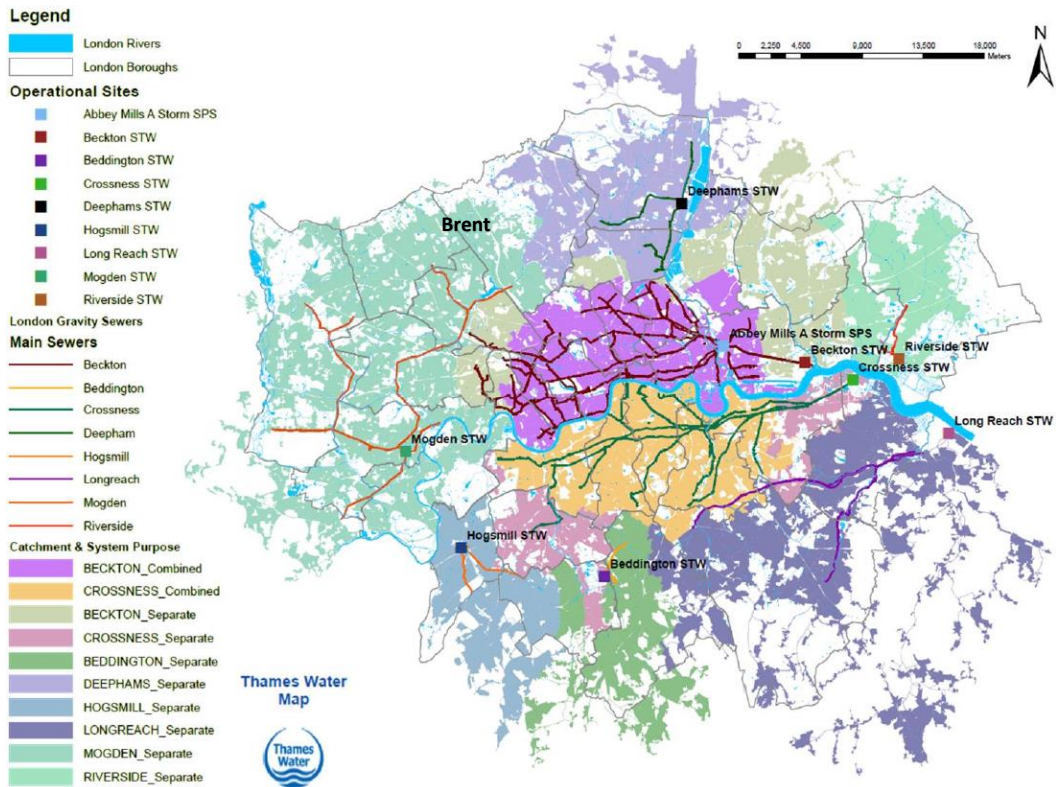
Source: Ordnance Survey.

Water

Thames Water Corporation is the main authority in charge of public water supply and waste water treatment in London. In Outer London, there are mainly separate systems that bring rainwater into local tributary rivers, and foul water to sewage treatment works (Figure 159).

³²⁷ Brent (2017) Digital Strategy 2017-2020.

Figure 159: Combined and separated sewer systems.



Source: GLA (2016) London Sustainable Drainage Action Plan.

Brent’s population is served by three sewage works: Beckton, Mogden and Deephams that treat water from the Thames and River Lee; and this sewage infrastructure also serves other boroughs (Figure 160).

Figure 160: London’s sewage treatment works for selected boroughs including Brent.

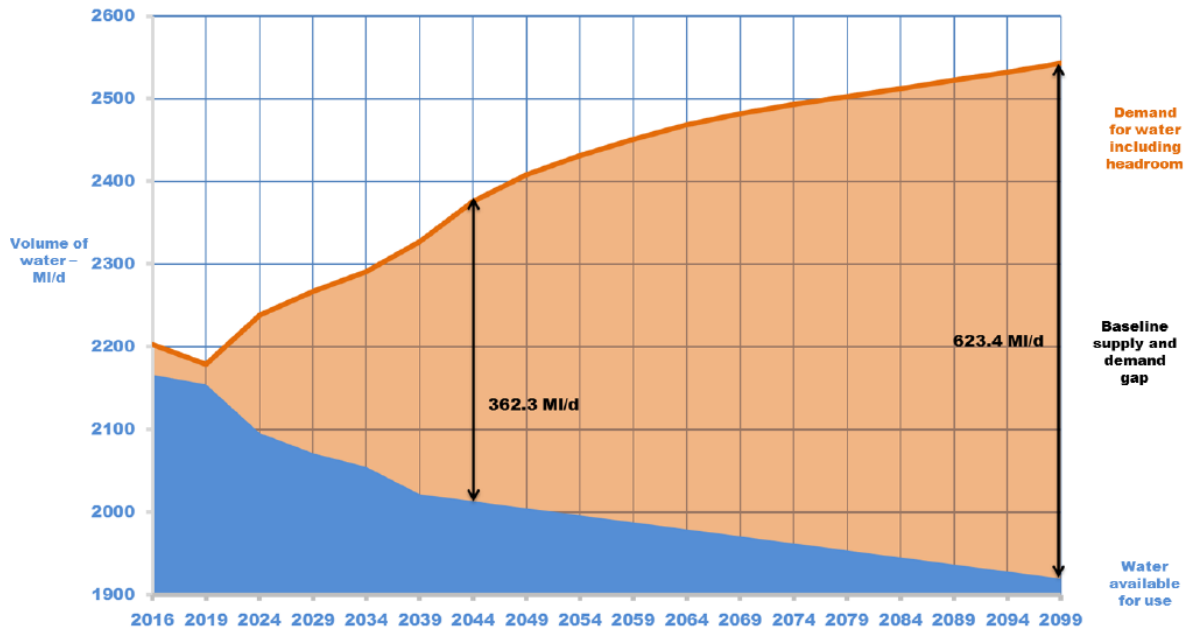
Sewage treatment works	Water course	Catchment	Population served (000s)	Consented flow* (m3/d)
Beckton	Thames Tideway	Barking & Dagenham, Brent, Camden, City of Westminster, City of London, Ealing, Hackney, Hammersmith & Fulham, Haringey, Islington, Kensington and Chelsea, Newham, Redbridge, Tower Hamlets, Waltham Forest	1,420,000	3,300
Mogden	Upper Thames Tideway	Barnet, Brent, Ealing, Harrow, Hillingdon, Hounslow, Richmond Upon Thames, and parts of Berkshire, Buckinghamshire and Hertfordshire	690,000	1,860
Deephams	River Lee via Salmon Brook	Barnet, Brent, Enfield, Haringey, Waltham Forest and parts of Essex and Hertfordshire	443,000	852

Source: GLA (2011) Securing London’s Water Future: The Mayor’s Water Strategy.

London’s water supply is in deficit, with the deficit growing from 7.6M litres per day (l/d) in 2016-17 to 40.1Ml/d in 2017-18. Over 2017-18, London’s annual water consumption per capita

was 120.8 l/d for households in measured (metered) areas, and 159.4 l/d for households in (unmetered) unmeasured areas.³²⁸ Thames Water indicates that London's overall water supply capacity is below consumption patterns. Growth in demand from an increasing population, and falling available supply due to climate changes, changes in bulk supply and increased third party abstraction from the River Thames, means the gap is predicted to widen if no action is taken, with insufficient water to meet London's needs.

Figure 161: Thames Water, Water Deficit Prediction (MI/d) 2016-2100 under dry year average.



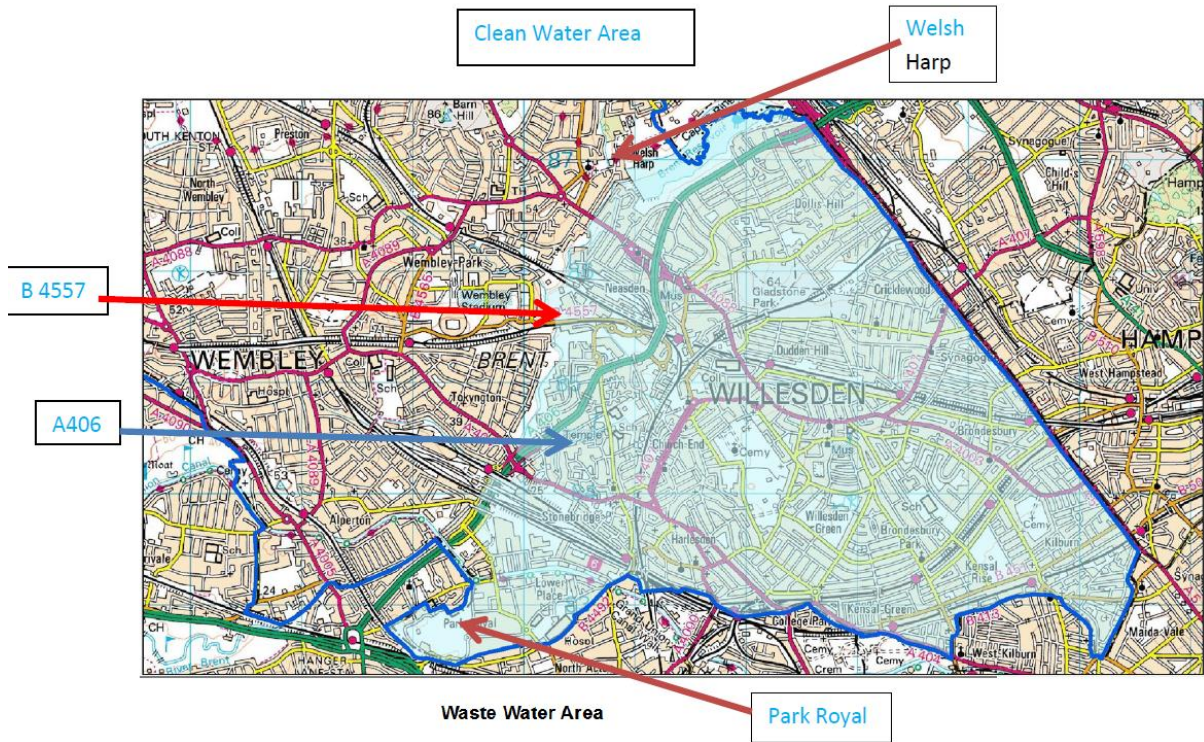
Source: Thames Water Revised Draft Water Resources Management Plan 2019

At a local level, Thames Waters are able to provide some limited detail on water demand and consumption in the District Meter Area which covers half of Brent south and east of the River Brent and Welsh Harp Reservoir.³²⁹

³²⁸ Thames Water (2017 & 2018) Environment Agency Annual Review 2016-17 and 2017-18

³²⁹ Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

Figure 162: District Meter Area in LB Brent



Source: Thames Water (2018) Environmental Information Request Response 12/091

Taking latest data for 2016-17 and 2017-18 provided by Thames Water below, household water consumption per capita is noted to be higher than the Thames Water 125 l/d standard³³⁰ or the London Plan³³¹ 105 l/d standard set for new domestic properties. Assuming an LB Brent average household size of 2.8 persons as per Census 2011, latest data indicates daily annual water consumption per capita fell from 152 l/d to 139l/d for households in the LB Brent District Meter Area between 2016-17 and 2017-18. Over the same period 2016-17 and 2017-18 the number of domestic properties metered in the area rose from 28% to 47% and this increase in metering is considered the main driver for the fall in water consumption. Clear variance is observed between daily water consumption per capita at both the London and Brent levels, with water consumption 30% higher at 156 l/d in unmeasured (unmetered), compared to 120 l/d in measured (metered), domestic properties in Brent over 2017-18.³³²

³³⁰ CLG / DEFRA (2007) Water Efficiency in New Buildings

³³¹ Mayor of London (2016) London Plan : Chapter Five : London's Response to Climate Change

³³² Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

Figure 163: Household and Commercial Water Consumption 2016-17 & 2017-18

		Property Count ¹	Average Daily consumption m ³	Average per property consumption l/d
Households	Measured	16457	5554.56	337.51
	Unmeasured ²	41451	19165.55	462.36
Commercial	Measured	2708	5426.57	2003.90
	Unmeasured ³	579	183.3	316.58

		Property count	Average Daily Consumption (ADC)	Average consumption per property
Household	Measured	27318	9207.34	337.043
	Unmeasured	30934	13530.88	437.4113
Commercial	Measured	2776	5302.4	1910.086
	Unmeasured	716	188.51	263.2821

Source: Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

The Environment Agency classified the water usage in London for 2013 as “seriously stressed” and demand will remain as such into the 2050s. This classification means that more than 20% of the population served by Thames Water is using water from areas classed as under serious stress by limited capacity.³³³

Thames Water have responded by implementing various measures to maintain water resources, including the “Thames Water’s metering” programme of water efficiency and leakage detection. This programme started in 2015, reducing water usage by 2.5 million litres per day, and was rolled out in Brent at the beginning of 2017.

In terms of infrastructure, in 2010 Thames Water opened the UK’s first large desalination plant at Beckton, which serves 150 million litres of drinking water daily to the population in North London, including one small part of Brent. Thames Water highlights the importance of implementing more initiatives to reinforce water supply, particularly in times of drought, and mentioned in its last strategy report that it is evaluating some other technical options for London, but does not specify any future investment in Brent.³³⁴ Current water infrastructure lies under most streets, which are subject to large-scale and widespread excavations.

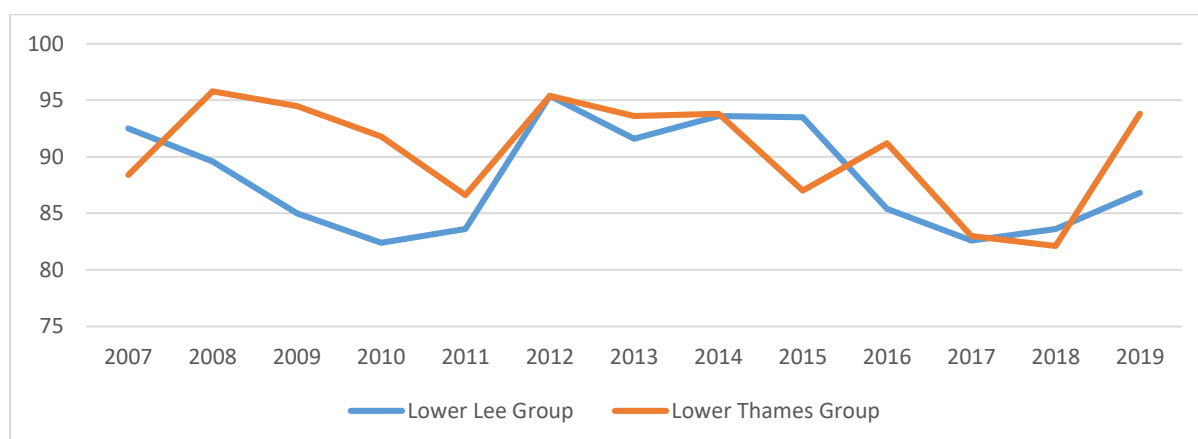
London has two main water reservoirs used to provide potable water to the population. In the last 10 years the capacity of those reservoirs has been above 80%. In the Lower Thames Group that satisfies water demand for Brent, capacity has been above 85% (Figure 164). This is not enough to provide water resources to London’s population, and more efficient use of the resource is required. Thames Water aim to improve the capacity and reliability of major treatment water works and deliver 100% compliance with drinking water quality standards.³³⁵

³³³ Environment Agency (2013) Water stressed areas: 2013 classification.

³³⁴ Thames Water (2017) WRMP19 Resource Options

³³⁵ Corporate Thames Water (2013) Our long-term strategy 2015-2040.

Figure 164: London Water Reservoir capacity level %



Source: Data London, Dataset London Reservoir Levels.

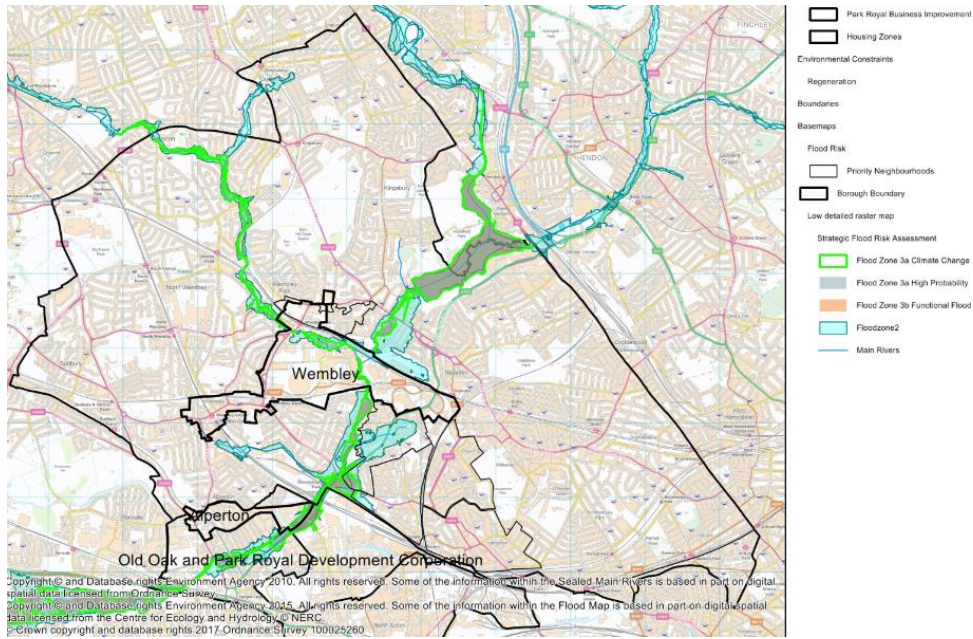
Since 1974, there has been no major increase in London’s strategic reservoir storage facilities. The last project built was the Queen Mother Reservoir in West London. In addition to the constraints on water supply, Thames Water must deal with widespread problems of pollution and flush impacts that severely impact on water quality. One of the main causes is that the drainage system is separate (Figure 160) and as a result, it is more complex and expensive to increase the capacity of London’s stressed drainage systems. Brent falls within an area of serious water stress that could generate future water shortages.

Concurrent to the water shortage issues explained, some areas in Brent have a high risk of surface water and sewer flooding. In 2016, Thames Water Corporation identified serious problems of sewer flooding and pollution in Brent.³³⁶

Particular attention must be paid to the sewage requirements in the Tokyngton and Harlesden wards, due to flood zone classifications, and Housing Zone areas and priority neighbourhood designations. Current sewage infrastructure, including sustainable drainage technologies, must be developed to support proposed growth and new development in these areas.

³³⁶ Corporate Thames Water (2016) Brent and Harrow.

Figure 165: Brent Flood Zones



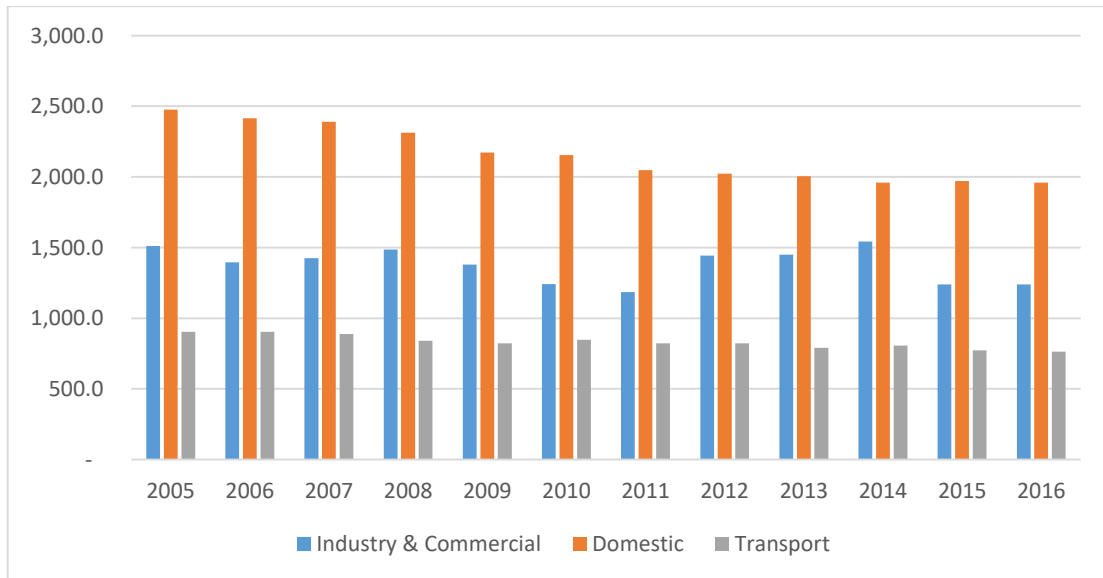
Source: Ordnance Survey.

Energy

Energy capacity in London is reaching the limit to satisfy the minimum requirements to maintain a working city. With 94% of energy supplied from sources outside the city, the GLA are analysing and promoting different measures to provide alternatives, and encourage energy efficiencies, particularly in buildings and transport.³³⁷

In Brent more than half of the energy used is in people’s homes. In spite of a growing population, domestic energy consumption has steadily declined since 2005 (Figure 166).³³⁸

Figure 166: Energy Consumption in Brent



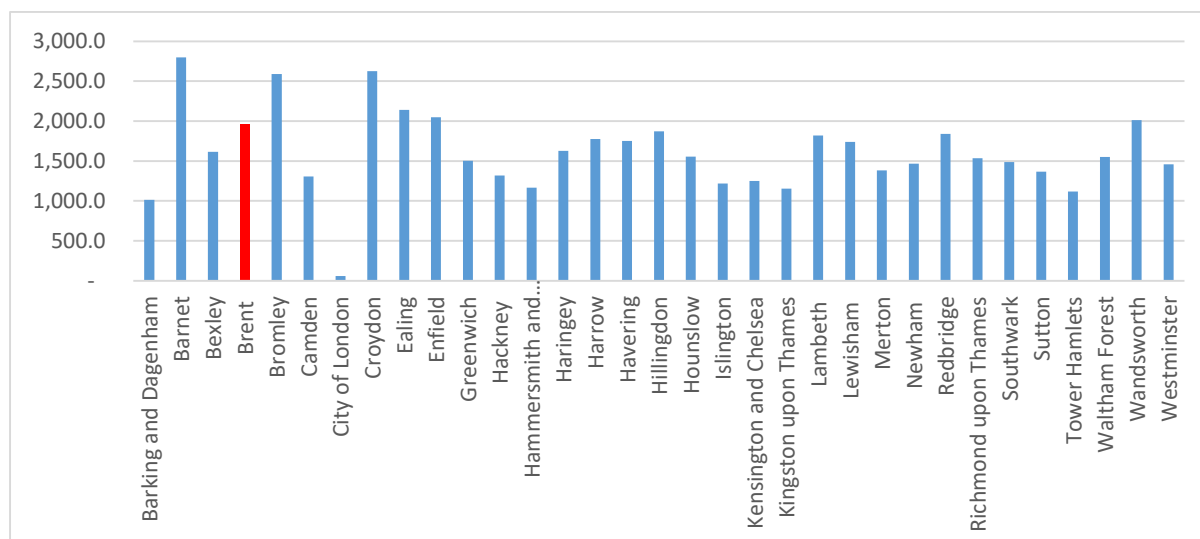
Source: BEIS (2019) Total final energy consumption at regional and local authority level.

³³⁷ GLA (2017) London Environment Strategy. Draft for public consultation.

³³⁸ BEIS (2017) Total final energy consumption at regional and local authority level.

According to the latest data available from the Department for Business, Energy & Industrial Strategy (BEIS), Brent was the 7th largest consumer of domestic energy in London (Figure 167).³³⁹ This underlines the pressure for the borough to develop infrastructure for sustainable energy provision, and align with the Mayor’s zero carbon objective by 2050.

Figure 167: Domestic Energy Consumption by borough in 2016



Source: BEIS (2019) Total final energy consumption at regional and local authority level.

Most of Brent’s energy is consumed from burning fossil fuels. Natural gas accounted for 47.8% of energy use in 2016; while electricity represented 31.3% and petroleum products 20.3%.³⁴⁰ Natural gas is mainly used to heat spaces and water for domestic consumers. Electricity is mainly used for commercial and industrial users, and petroleum used for road transport.

To understand current and future energy infrastructure requirements in Brent, besides analysis of energy consumption patterns, it is important to consider the environmental impact of demand. In London, electricity consumption accounts for almost half of total CO² emissions, while gas use contributes 30% of total emissions. National and local policy is to decarbonise energy, with generation from renewable sources, retrofitting of existing buildings and regulations to ensure new developments satisfy emissions limits.

Since 2007 Brent Council has implemented a Carbon Management Programme (CMP) which aims to reduce Council-generated emissions by 15%, by reducing energy used by Council assets. This programme has included introducing street lamp posts with LED technology and implementing energy efficiency systems on Council buildings. In 2017/2018 the Council had exceeded its 4 year 15% target reductions in CO², achieving 15.6% savings³⁴¹.

Brent has solar photovoltaic technology (PV) on some public buildings and schools, although there is no specific information about how much energy is produced from these assets, nor the amount of PV infrastructure on private buildings.

The Council is currently analysing further implementation of PV Solar panels and mapping potential areas to install sustainable energy plant. The Council is also planning to implement district Energy networks in some growth areas and regeneration schemes which would supply thermal energy to buildings and businesses from central energy centres by moving water

³³⁹ BEIS (2019) Total final energy consumption at regional and local authority level.

³⁴⁰ BEIS (2019) Total final energy consumption at regional and local authority level.

³⁴¹ Carbon Management Programme (CMP) CO₂ Emissions Report 2017/18

through a network of underground pipes. This technology will allow to business and households to use local waste-heat and low carbon fuels rather than generate their own heat or cooling onsite through burning fossil fuels.

Initiatives to bring more efficiency to domestic energy consumption include the “Big London Energy Switch” programme, a collective switching scheme working since 2013 over 20 London Boroughs. The scheme works by bringing together a large group of residential consumers to secure better deals from energy suppliers in an auction process through increased collective bargaining power. Since the scheme began in Brent, over 2,600 households have signed up, with savings on energy bills over £200 a year for those residents that have switched suppliers in the last five auctions.³⁴²

³⁴² Brent (2017) Big London Energy Switch.

Key Trends

The GLA projects London's population and economy will continue growing. Growth will mean changes in economic activities, demographics and lifestyles that will impact future infrastructure requirements. Brent's population is projected to increase 17% between 2019 and 2040 to reach 400,000 people. The Draft London Plan (2017) sets a new target of 29,150 additional homes to be delivered in Brent over the period 2019/20 to 2028/29, an average of 2,915 per annum³⁴³.³⁴⁴ These growth projections should be considered in line with the main trends and changes anticipated in relation to infrastructure across London and in Brent.

Trend 1. Increased Demand for Public Transport

Brent's population growth will increase demand for an efficient transport system that connects housing, jobs and cultural facilities. Achieving an efficient transport network is one of the Mayor's priorities to create the conditions for London's global economy to flourish. Efficient transport aligns with the London Environment Strategy, which encourages the use of public transport and green modes of transportation, with the aim to reduce carbon emissions in the city.

In London, some parts of the city have been predominantly planned around the car, making an inefficient use of road space relative to the number of people that could be moved by sustainable transport modes. Buses can move 70 people in the same amount of space taken up by about three cars. Many trips that people make by car, which they may not want to make by foot or bike, can be switched to the bus. These measures could free up street space and reduce the dominance of motor vehicles that negatively impact the street environment.

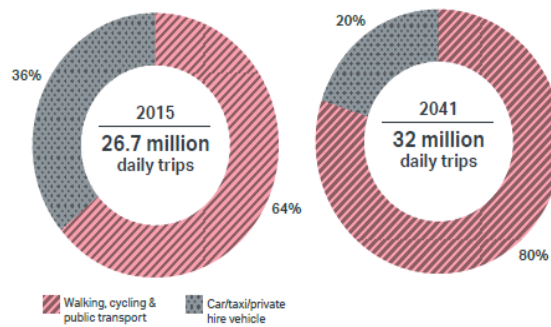
Outer London is more dependent on the car than Inner London. In Brent, 40% of commuters use cars and motor vehicles. Current infrastructure support for car use has contributed to an increase in poor public health as result of pollution, congestion and dangerous places to walk and cycle. Tube, rail and bus services can, however, be overcrowded and sometimes unreliable and indirect, meaning there is no appealing alternative to car use for many people.

In London it is expected population growth will generate more than 5 million additional trips each day by 2041. The GLA expect that without further investments from TfL, 71% of travel on London Underground and 65% of travel on National Rail in the morning peak will be in crowded conditions. In order to reduce these problems, the Major's aim is to improve the transport system as well as improve green infrastructure such that by 2041 80% of Londoners' trips would be on foot, by cycle or by using public transport (Figure 168).

³⁴³ GLA (2017) Draft London Plan

³⁴⁴ GLA (2015) Statistics. Expected employment growth in Brent 2017-2036

Figure 168: Mode share 2015 and 2041 expected.



Source: GLA (2017) Mayor's Transport Strategy.

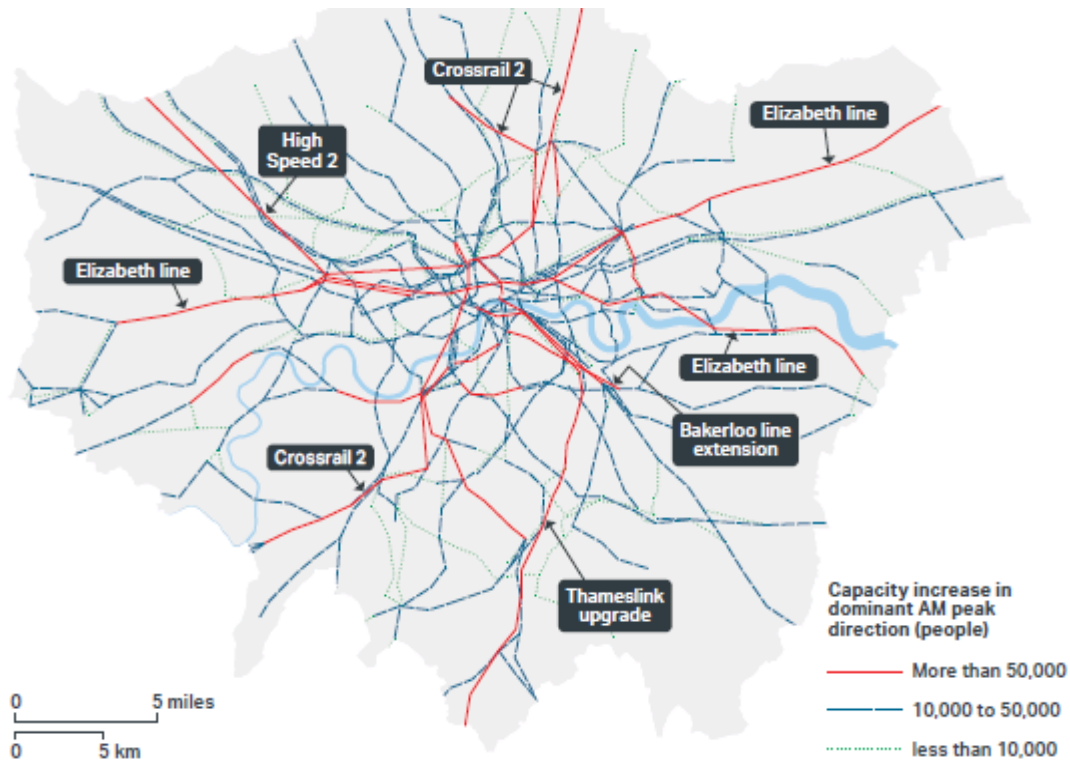
Given projected growth in population and jobs in Brent, it is essential to consider current and future transport infrastructure for rail, bus, cycling and walking, in order to reduce private vehicle dependency, and create places that people of all backgrounds and incomes can enjoy living in. Without new investment, transport routes will become increasingly overcrowded, air quality will worsen and streets and public places will become ever-more dominated by motor traffic.

Consultation undertaken when drawing up Brent's Transport Strategy indicated citizens main concerns surround accessibility within the borough, air quality, congestion and road safety, and proposed increases in walking and cycling and public transport accessibility³⁴⁵.

In London, employment growth will generate an increase in travel by all rail modes of more than 50% by 2041 (Figure 169). As a result of investment in some of the major strategic projects under development by TfL to support this employment growth, transport connections will be improved in specific areas including some within Brent.

³⁴⁵ Brent (2016) Long Term Transport Strategy 2015-2035.

Figure 169: Proposed rail and tube capacity increases, 2015-2041 morning peak hour.



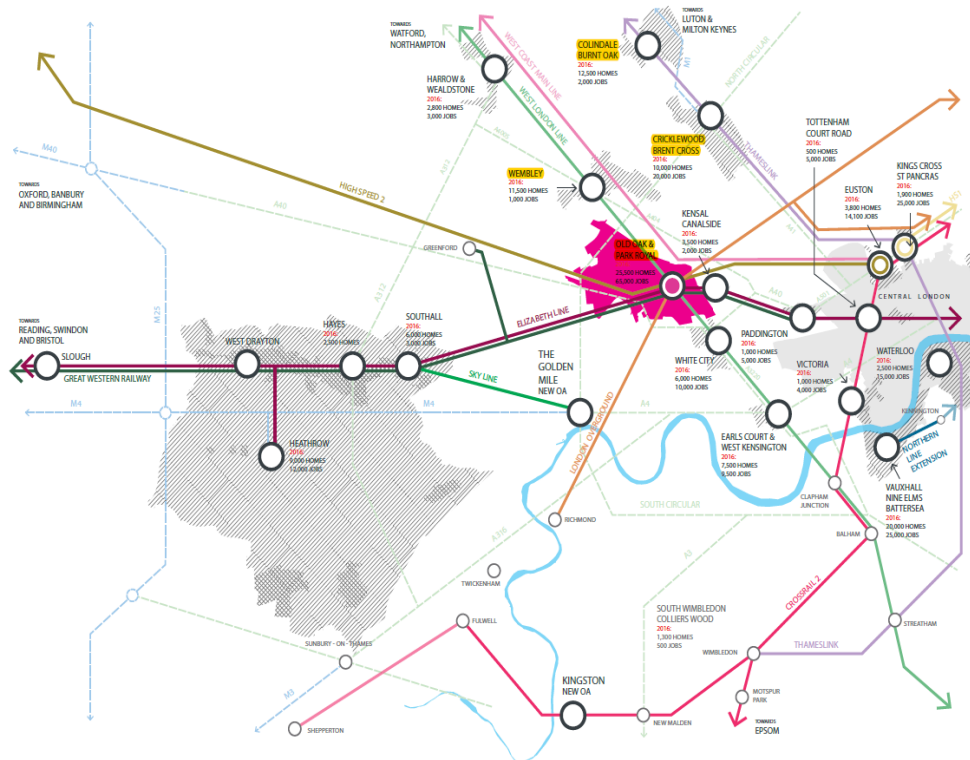
Source: GLA (2018) Mayor's Transport Strategy.

The GLA aim to provide a projected 70% increase in rail and tube capacity serving 1.5 million new homes by 2050. Future improvements for Brent could include:

- Thameslink extension in Colindale and Cricklewood that will connect with Crossrail;
- Crossrail Old Oak Common Station in Hammersmith and Fulham that will increase connectivity in the south of Brent and the area of Park Royal.
- Crossrail spur from Old Oak Common to stop at Wembley Central station and the West Coast Mainline
- West London Orbital Rail that will improved the connection with Outer London with stops considered in Neasden and Harlesden.

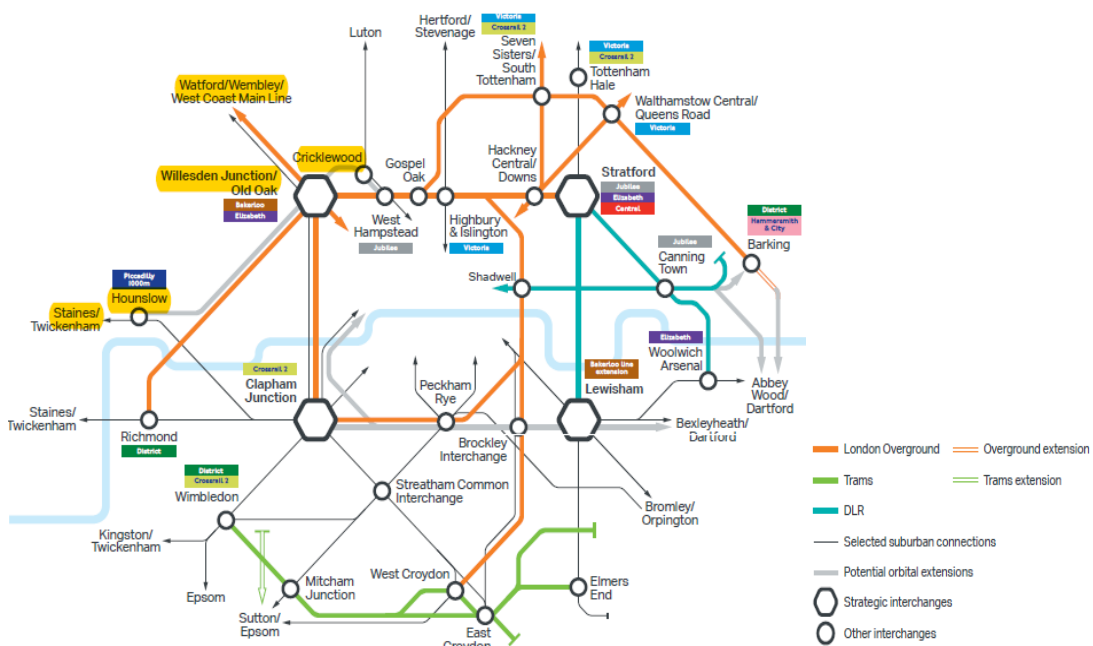
Planned new transport capacity and improvements in West London includes growth areas such as Park Royal and Wembley, which will receive direct benefits, and improve connections with both Outer and Central London (Figure 170 & 171).

Figure 170: Transport connections West London



Source: OPDC (2017) Local Plan Revised Draft

Figure 171: Potential and improved Orbital Rail Links in Inner and Outer London



Source: GLA (2018) Mayor's Transport Strategy

Old Oak and Park Royal

The new Crossrail Elizabeth Line 1 due to open in 2020, will increase network connectivity close to Brent, however at the same time raise congestion challenges. The Elizabeth Line station at Old Oak Common will be the only place where High Speed Two (HS2) connects with Crossrail (Figure 172). The station will have capacity for 250,000 passengers a day and is set to become the most connected place in the UK. It will be 8 minutes from Heathrow, 10 minutes from the West End, and 38 minutes from Birmingham.

Figure 172: Map of Elizabeth Line

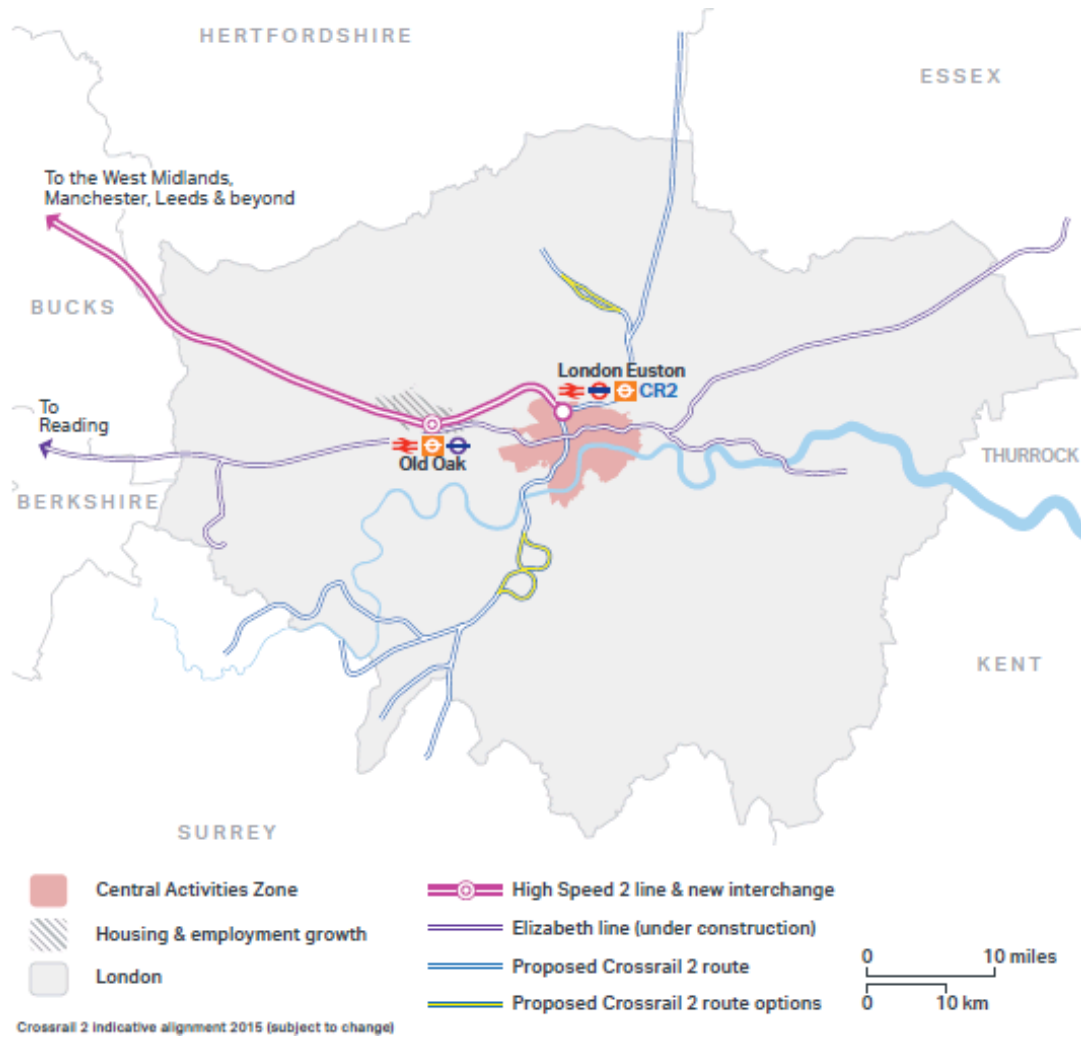


Source: GLA (2018) Mayor's Transport Strategy.

HS2 will increase the connectivity of London and reduce travel times to Birmingham, Manchester and Leeds. The first phase will have two stations in London. Old Oak Common station will be located in Old Oak & Park Royal in the borough of Hammersmith and Fulham, close to the Brent borough boundary. Old Oak Common will be a strategic station that increases connectivity in West London to and from the West End, the City and Canary Wharf, and westwards to Heathrow through Crossrail.³⁴⁶ Strategic rail connectivity will therefore be increased close to Brent, but this will also create challenges to avoid and mitigate increased road congested close to the station (Figure 173).

³⁴⁶High Speed Two (HS2) limited (2017) Interactive map.

Figure 173: HS2 Connections

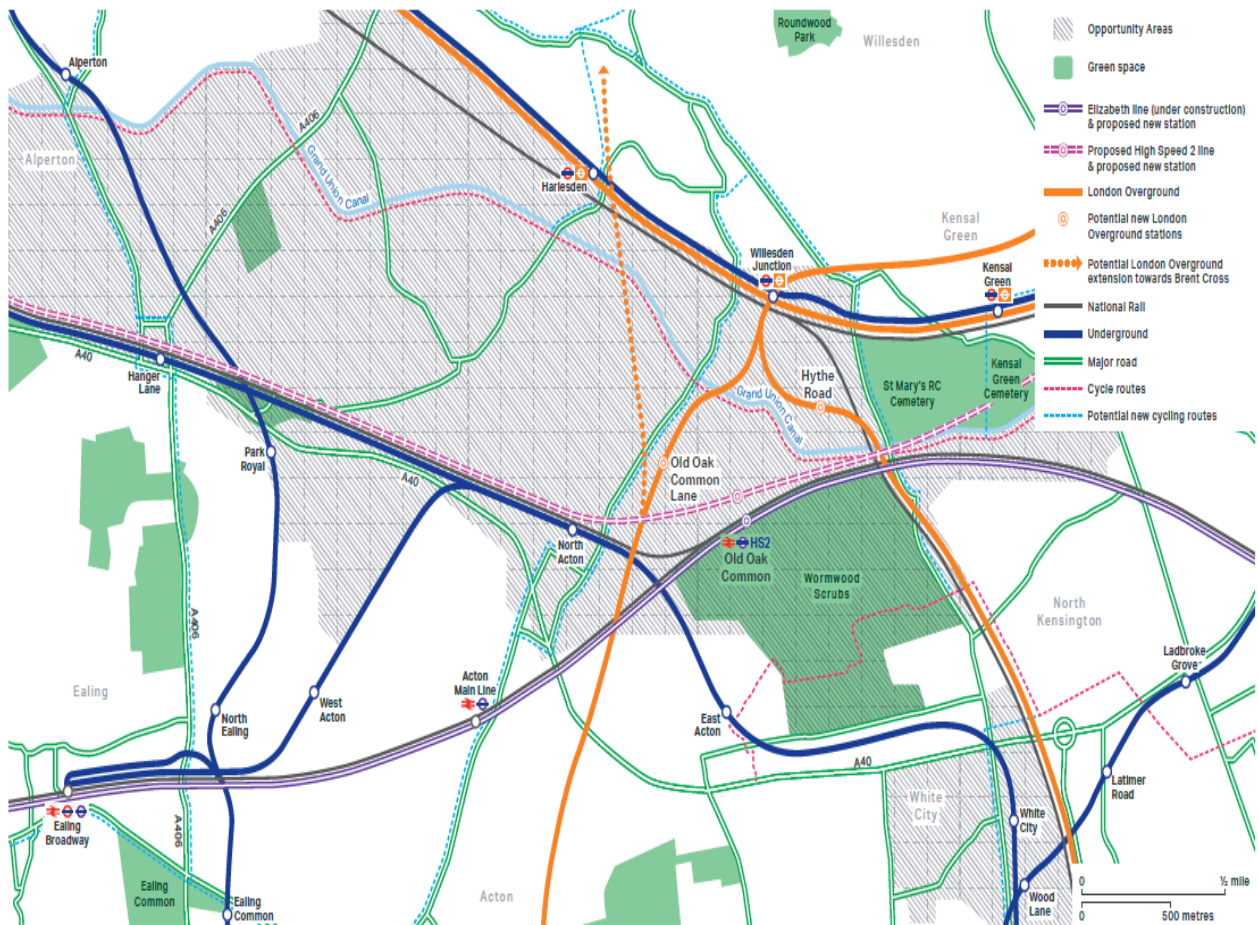


Source: GLA (2018) Mayor's Transport Strategy

GLA expect the regeneration of Old Oak & Park Royal to develop a new mini-city at a scale not seen since Canary Wharf. Around 37,000 jobs and 14,000 new homes are possible at the 650-hectare site in what is the UK's largest regeneration scheme.

The transport improvements in Old Oak Common will increase opportunities for Brent, notably with an extension in the London Overground line, particularly towards Brent Cross. New infrastructure will also include bus route extensions and cycle lanes, some of which will benefit Brent directly (Figure 174).

Figure 174: Transport proposal for homes and jobs at Old Oak and Park Royal



Source: GLA (2018) Mayor's Transport Strategy

Crossrail West Coast Mainline at Wembley Central.

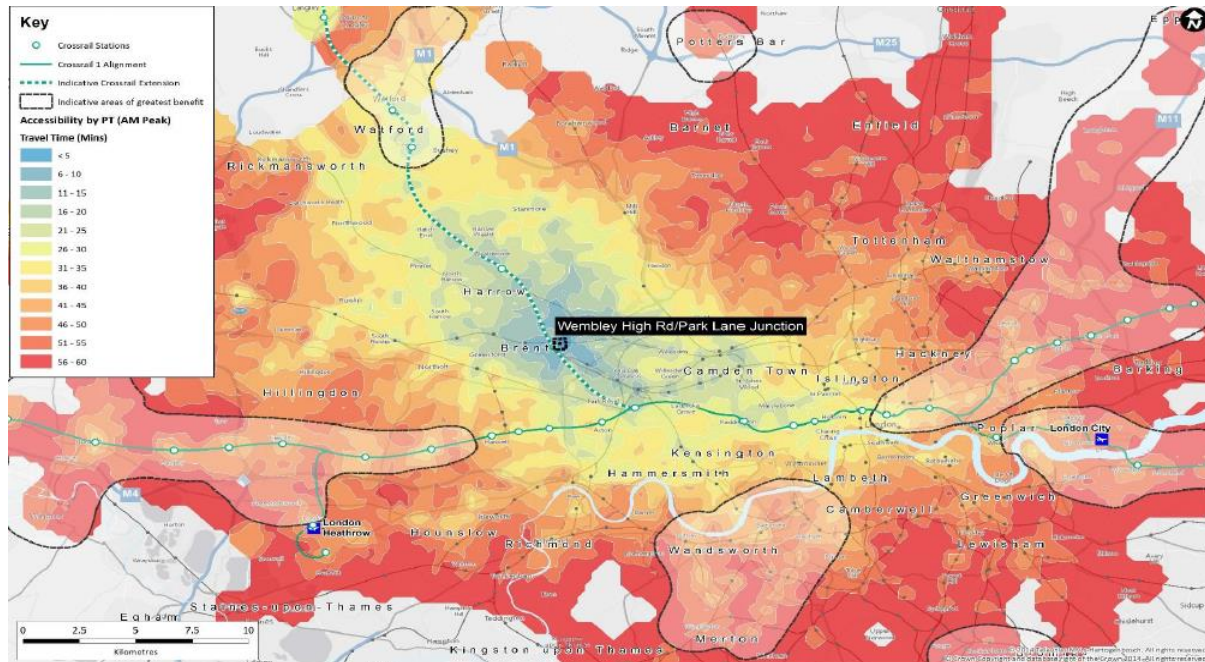
The proposed Crossrail 2 extension could be delivered with the Crossrail West Coast Main Line Link (Crossrail WCML Link), connecting with the main Crossrail Line Elizabeth 1, and including the station at Old Oak Common and a stop at Wembley Central. This delivery option would increase public transport capacity to Brent and improve connections with Heathrow, Central and Outer London³⁴⁷. The extension would reduce journey times, improve Wembley business access to a wider labour pool, and attract more day visitors to Wembley and wider Brent. Crossrail would improve accessibility and demand for housing and commercial uses in Wembley Growth area. The overall catchment area for 60-minute travel time from Wembley Central would be enlarged, and Crossrail would also improve accessibility towards Reading and Heathrow, as well as London City Airport and other destinations along the eastern section of Crossrail 1 (Figure 175).

A Crossrail spur from Old Oak Common to stop at Wembley Central station and the West Coast Mainline would bring economic benefits, including an estimated £50m per year in additional Gross Value Added (GVA) benefits, supporting 750 additional end-use FTE jobs and £118m in additional one-off construction related GVA. The incremental end-use net GVA

³⁴⁷ Brent (2015) Employment skills and enterprise strategy 2015-2020 page 7.

at £50m that could be stimulated with the Crossrail WCML Link Wembley Central station could offset a sizable proportion, if not all, of the development costs involved.³⁴⁸

Figure 175: Areas accessible from Crossrail WCML link extension stopping at Wembley Central.



Wembley Central Crossrail Spur
 Areas Accessible to Analysis Point within 60 Minutes: 2031 Crossrail Case (Rail, Bus, Underground)
 Source: SQW (2015) Assessing the Business Case for a Crossrail West Coast Main Line Link stop at Wembley Central Report to the London Borough of Brent

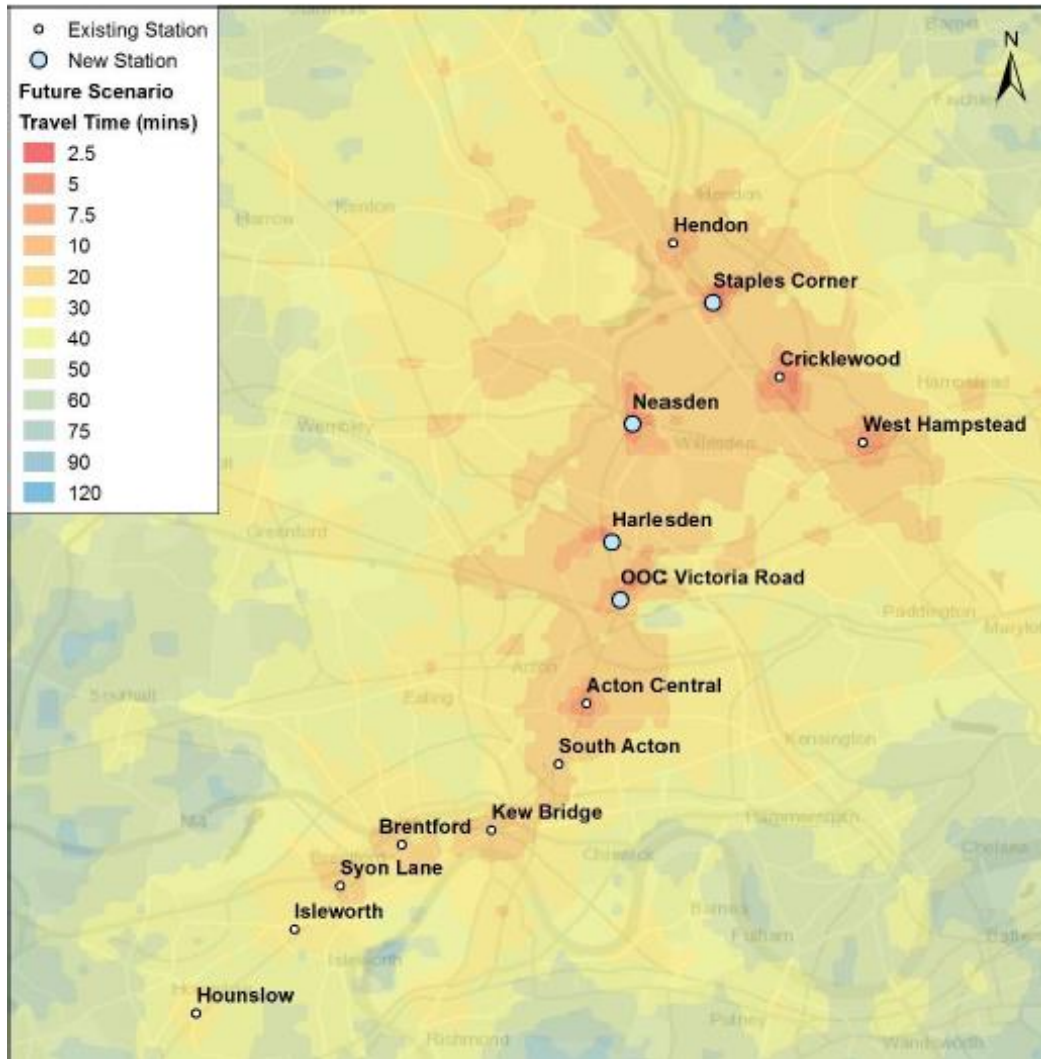
Wembley is identified as an Opportunity Area expected to deliver at least 11,500 new homes and 11,000 new jobs. Wembley Stadium is a centrepiece, with capacity for 90,000 people and hosting around 30/31 events per annum, and the national stadium reinforces London’s world city status. Improving transport infrastructure with the Crossrail WCML Link to Wembley would increase the wellbeing of residents, bring economic benefits, increase attractiveness and demonstrate international connectivity to Heathrow and London City Airports.

West London Orbital (WLO)

The Dudding Hill Line is an existing 4-mile long railway line in north-west London running from Acton to Cricklewood, used mainly by freight, with no electrification and a 30 miles per hour speed limit. The West London Orbital line would extend the London Overground, restoring rail passenger services on the Dudding Hill Line and the Kew – Acton link. The line is identified in the Mayors Transport Strategy (2018) and could include three stations within Brent: Staples Corner, Neasden and Harlesden (Figure 176).

³⁴⁸ SQW (2015) Assessing the Business Case for a Crossrail West Coast Main Line Link stop at Wembley Central Report to the London Borough of Brent.

Figure 176: Accessibility of new West London Orbital line



Source: WSP (2017) West London Orbital Rail. Technical Analysis and conclusions.

Neasden and Harlesden stations are considered integral to the re-opening of the northern stretch of line from Old Oak Common to West Hampstead/Hendon. The cost of these 2 stations has been estimated as £12m. While the station of Staples Corner is optional, depending on the scenario chosen, that station could cost an estimated £5m. The total capital cost of the WLO including new platforms, stations is estimated at £146m, plus a risk/contingency allowance of 80%, which would push total costs towards £300m. Initial analysis from WSP indicates that the Community Infrastructure Levy (CIL) from potentially 15,000 to 20,000 new homes planned in West London could create around £150m to fund the capital cost of the WLO.³⁴⁹

The WLO line would accommodate additional passenger demand resulting from population growth and employment across West London; provide an additional public transport route; contribute to reduced reliance on private car use; and, alleviate congestion on the A406 North Circular Road. The WLO would support an intensification of housing development to be delivered across West London particularly concentrated in Neasden and Church End, as well as address public transport requirements for the corridor between Hounslow and West Hampstead/Hendon (Figure 177).

³⁴⁹ WSP (2017) West London Orbital Rail. Technical Analysis and conclusions.

Figure 177: PTAL scores with and without WLO rail services.



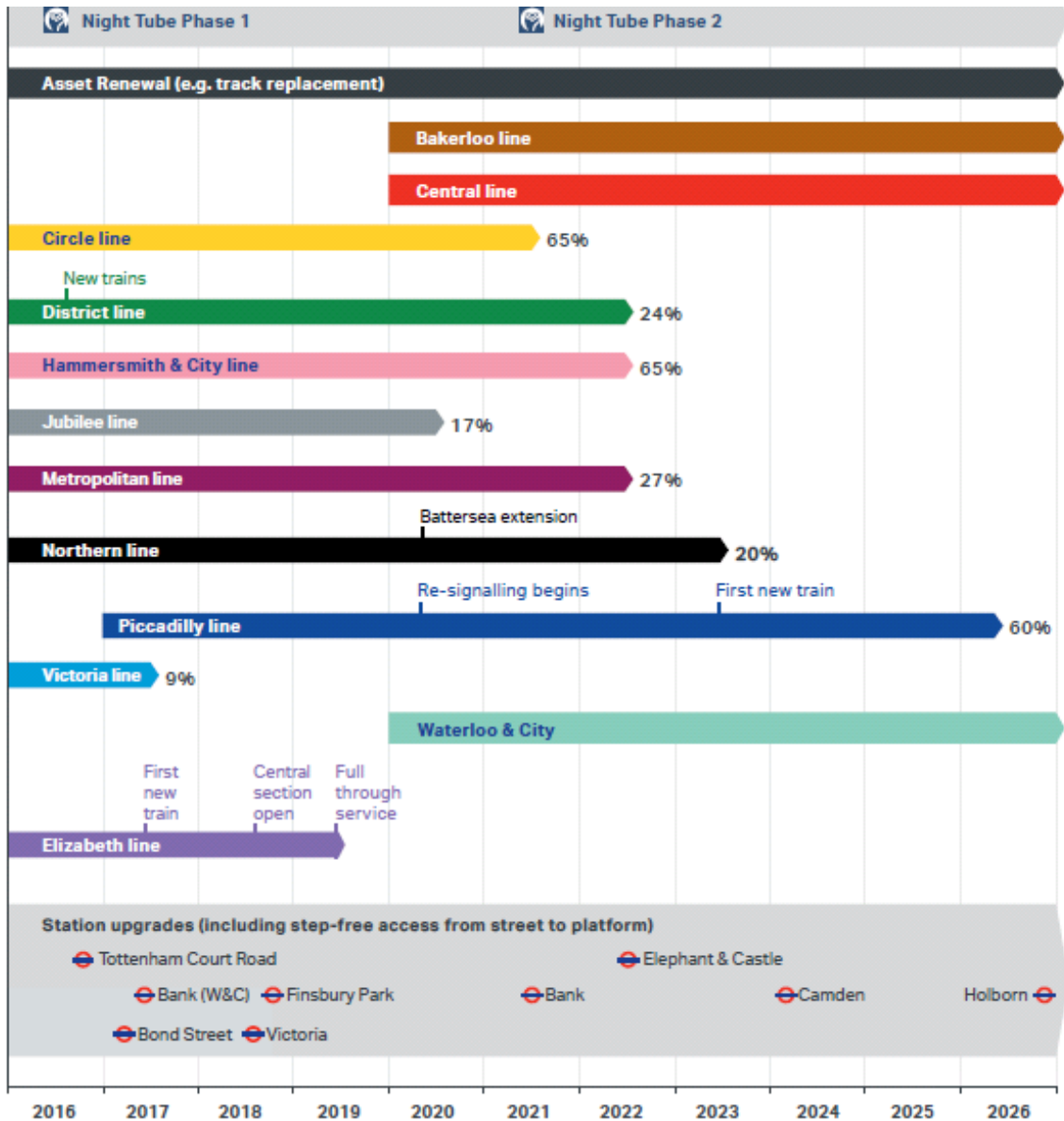
Source: WSP (2017) West London Orbital Rail. Technical Analysis and conclusions.

Underground

The GLA plan increased underground train frequencies from the current maximum of 34 up to 36 trains per hour, across the Jubilee, Piccadilly and Northern Lines by 2035. These changes will increase the peak capacity of these lines by 20-50%, and Brent businesses and residents would expect to benefit from the increase in capacity of the Jubilee Line which runs across the borough. Brand new, air-conditioned, walk-through trains will also add capacity and improve passenger comfort. The planned extension to the Bakerloo Line south, will also improve connectivity from North to South London.

The 24-hour transport system for bus and underground is also planned to be extended, complementing the existing network. This will be accompanied by out-of-hours freight deliveries to ensure London has a transport system that supports a 24/7 city (Figure 178).

Figure 178: Night Tube Improvements 2016-2026



Source: GLA (2017) Mayor's Transport Strategy.

Currently only 3 underground stations in Brent have step free access. TfL is committed to accessibility programmes and to increase the number of Underground stations across the network from the current 27% to 40% by 2022 (with Park Royal station part of the latest £200m programme to introduce step free access at 13 stations by 2022³⁵⁰). The TfL target is that two thirds of public transport journeys will be step free by 2050.

Heathrow expansion

In 2016 Central Government announced its preference for a new northwest runway at Heathrow Airport with the aim to deliver additional airport capacity in the South East of England by 2030. The subsequent approval and formal designation of the Government Airports National Policy Statement in June 2018 paves the way for Heathrow to submit a formal

³⁵⁰ Mayor of London Press Release (2018/01/19)

planning application. This project would increase airport capacity by more than 50% from 480,000 flights to 740,000 flights per year.³⁵¹

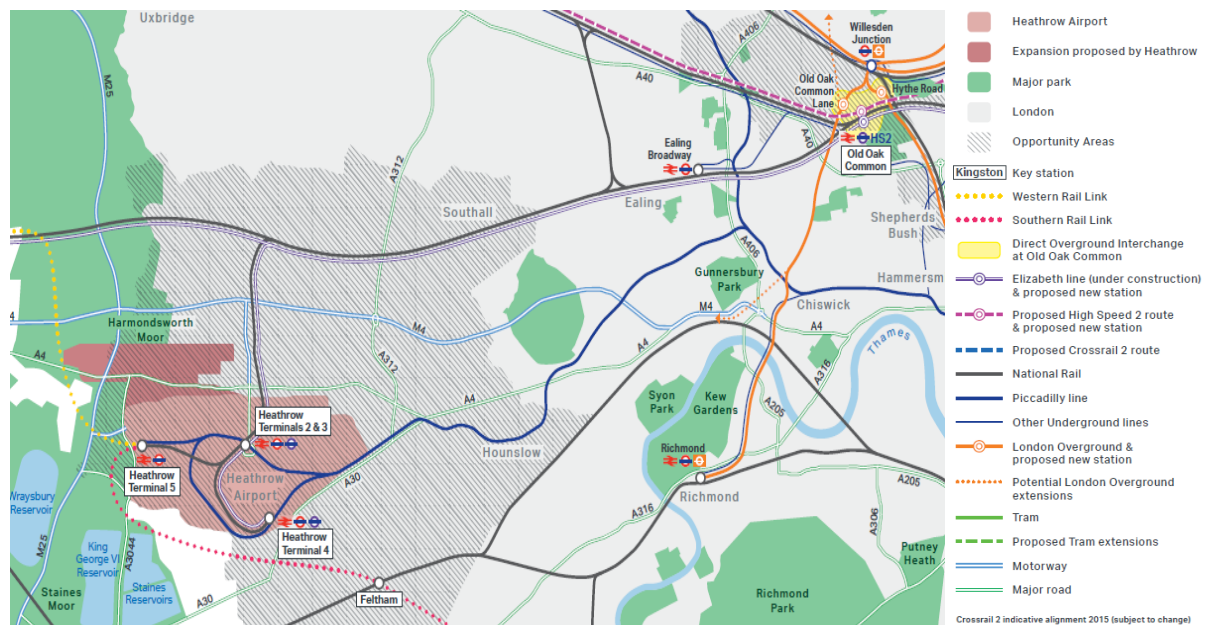
Heathrow expansion is justified as required to maintain the competitiveness of London and the UK. The Government estimates that to not increase airport capacity would cost the UK economy between £30 billion and £45 billion over 60 years.³⁵²

Heathrow expansion will require significant new infrastructure to relieve pressure on air quality, due to the additional highway trips expected, increasing the pressure on congested roads and traffic. Forecasts indicate that with the proposed airport expansion, public transport trips would increase more than 250%, a level of demand not sufficiently accommodated by existing and planned infrastructure improvements such as the Elizabeth Line and Piccadilly line upgrade.

National government aims to ensure highway traffic will not rise, expecting to achieve a public transport mode share of at least 50% by 2030, and at least 55% by 2040, for passengers³⁵³. The Mayor’s Transport Strategy indicates that the transport projects shown in Figure 179 would need to be delivered in order to support increased public transport for the Heathrow expansion:

- Western Rail Link to Heathrow-direct services from the Thames Valley: Slough, Maidenhead and Reading.
- Southern rail link to Heathrow – direct services via a route with sufficient spare capacity from central, south and south west London, as well as Surrey.
- London Overground extension, including a direct Overground interchange at Old Oak common.
- Improvements to bus, cycling and walking infrastructure serving the airport

Figure 179: Additional surface access requirements for expanded Heathrow Airport.



Source: GLA (2017) Mayor’s Transport Strategy.

³⁵¹ GLA (2017) Mayor’s Transport Strategy

³⁵² DfT (2017) Revised Draft Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England.

³⁵³ ⁴² Department for Transport (2017) Revised Draft Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England.

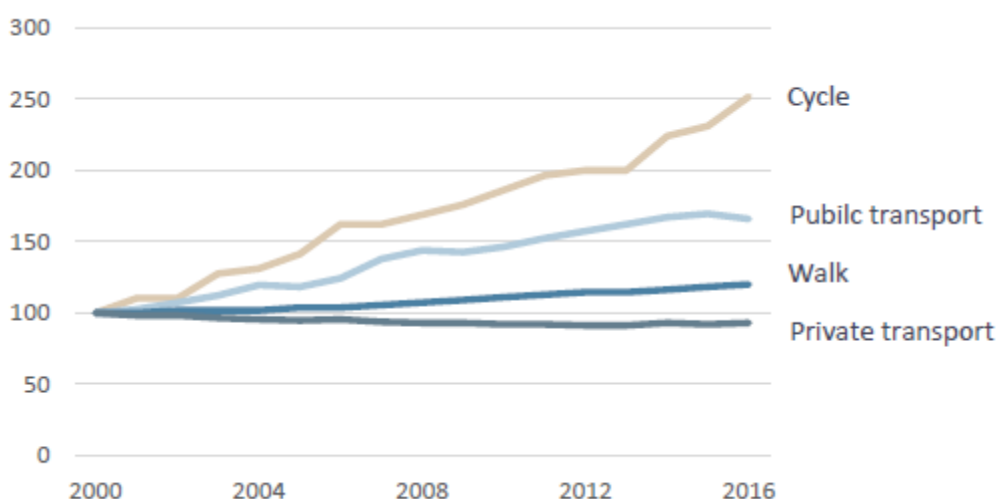
The expansion plan for Heathrow could bring benefits to Brent and Park Royal, with the potential connectivity that will bring to the Old Oak Common Station, and the airport increasing business links and improving international access. Similarly, a Crossrail WCML station at Wembley Central would connect through to an expanded Heathrow, opening a new employment hub for Brent residents. Central government predict that Heathrow expansion will generate up to 21,000 new local jobs by 2030 and 60,000 new local jobs by 2050.³⁵⁴

Trend 2. Increased Cycling and Walking Transport Modes

To reduce the negative effects of motorised cars, it is important to provide greener and more efficient transport alternatives that discourage car dependency across the borough.

One of the most recent and pronounced trends has been the growth in cycling and walking – a return to more ‘human-centred’ modes of travel. Examples of initiatives that encourage cycling and walking include: the provision of secure and dry cycle parking; cycle lanes and pathways separated from cars; loans for bicycle purchase; city bike club schemes; and freedom to carry bicycles on bus and trains services.

Figure 180: Cycling is the fastest-growing mode of transport in London



Source: London Assembly (2018) London's Cycling Infrastructure

The benefits of increasing the uptake of cycling and walking in London are significant in terms of improved air quality, less congestion and a fitter and healthier population. The Mayor set out a long term plan to reduce the number of cars and increase alternative use of walking, cycling and public transport. The Mayor's aim is to achieve a 400% increase in levels of cycling by 2026, resulting in an average 5% mode share for cycling across London³⁵⁵. This plan includes a comprehensive network of cycle routes for all types of journey and cyclists, including 200 kilometres of new Dutch-style cycle highways, at least five new major pedestrian, cycle or green bridges, and inter-regional cycle corridors connecting London to towns outside such as Cambridge. The Mayor has committed to spend £169m per year on cycling as part of the £2.2 billion budget for Healthy Streets over 2018-2023³⁵⁶.

³⁵⁵ Brent (2016) Brent Cycle Strategy 2016-2021

³⁵⁶ London Assembly (2018) London's Cycling Infrastructure

Although Brent has some cycling infrastructure, that remains below London levels, and below other Outer London boroughs that have received direct support from the Mayor. Since 2001, TfL has worked with London boroughs and other partners to improve London's cycling infrastructure, starting with the London Cycle Network (LCN) and London Cycle Network+ (LCN+), then Cycle Hire and the first generation of Cycle Superhighways, and more recently the second generation of Cycle Superhighways and first Quietways and Mini-Hollands.

Strategies to encourage cycling, walking, and the bus as transport modes, such as the Healthy Streets agenda, are planned in London to increase infrastructure provision and improvements for these modes. The target is to triple the proportion of Londoners living within 400m of one or more of these cycle routes to around 35% by 2022.

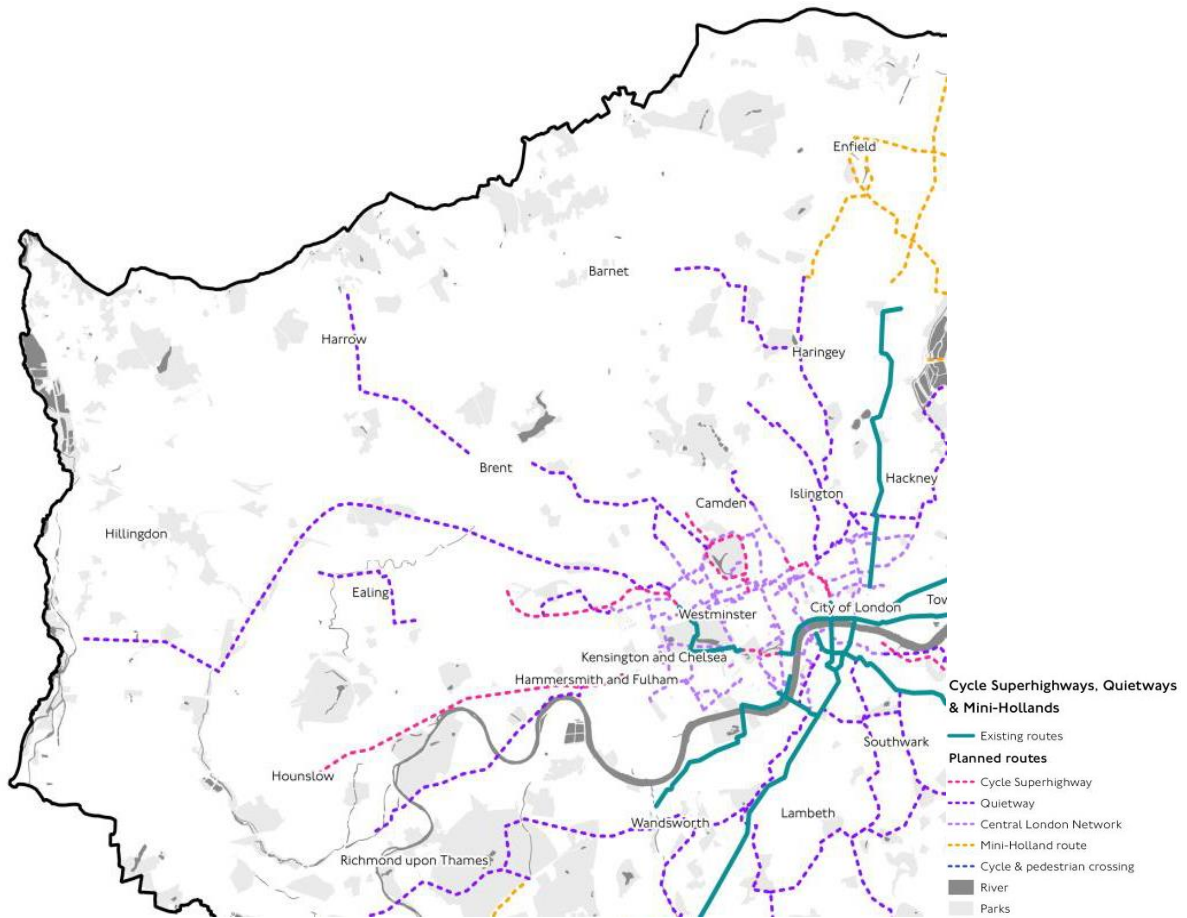
By 2022, TfL is planning to invest in more than 340 km of cycle network focusing on current demand, areas with potential for people to switch from motorised trips to cycling, and areas with the highest growth in population and employment. TfL have identified the overall cycling connections to provide for a larger number of cyclable trip based on potential demand.³⁵⁷

The current TfL investment plan includes a Quietway that could go through Wembley in Brent (Figure 181). Additionally, TfL identifies strategic cycling connections based on their potential to address cycle needs, including Wembley, Cricklewood and Willesden Junction in Brent as top potential connectors (Figure 182). In 2018 the Mayor announced a 5km north-west London's first major cycle route, connecting Wembley, Stonebridge Park and Willesden Junction. Future sections will connect to planned infrastructure in west London such as CS9 and CS10.³⁵⁸

³⁵⁷ TfL (2017) Strategic Cycling Analysis

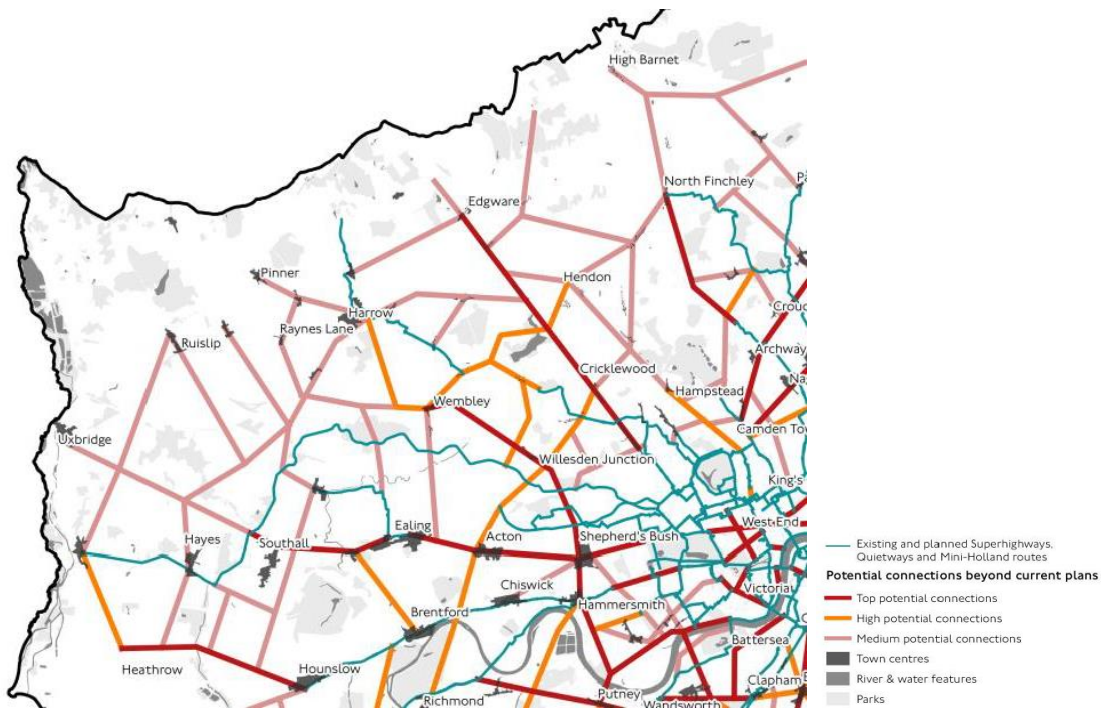
³⁵⁸ Green light for development of six new cycle routes across London

Figure 181: TfL Business Plan for Cycling Routes by 2022



Source: TfL (2017) Strategic Cycling Analysis

Figure 182: Prioritised Strategic Cycling Connections



Source: TfL (2017) Strategic Cycling Analysis

Trend 3. Transportation Technology for Motorised Vehicles

Electric Vehicles

The UK is currently the leader in European manufacture of electric cars. In 2011, the UK was the first country in the world to announce plans to ban the sales of conventional petrol and diesel engine cars and vans by 2040, switching to a zero emission vehicle strategy by 2050. To achieve this target, Government has committed £2.7 billion investment to a plan that includes³⁵⁹:

- £1 billion for UK's charging infrastructure for ultra-low emission vehicles (ULEVs) that includes hybrid and electric car and van;
- £0.29 billion for new buses, bus retrofits, plug in taxi programme that includes £80 million for ULEV charging infrastructure.
- £1.2 billion for cycling and walking infrastructure from 2016-2021
- £0.1 billion for national road networks air quality improvements.
- £89 million for 1,200 new low carbon buses on roads under the Green Bus Fund.
- £27 million to retrofit almost 3,000 of the oldest vehicles (mainly buses).
- £11 million to help Local Authorities improve air quality through the Air Quality Grant scheme.

The Air Quality Grant programme, implemented since 1997 aims to help Local Authorities tackle air pollution and is accessible to Brent. Between 1997 and 2019, over £57m has been awarded through the programme, focused on support schemes to tackle NOx. In 2018-/19 just over £3 million was granted to different initiatives including: £0.24m for retrofits for electric buses in York; £0.42m to reduce emissions from the delivery of goods and services, including trialing EV use, in Inner London boroughs; and, £0.05m for canal electric vehicle charging point (EVCP) infrastructure in Islington.³⁶⁰

In London TfL is making available the "plug-in car grant", a government programme to encourage drivers to switch to electric cars and vans, providing a discount of up to £4,500 for eligible pure electric cars and £2,500 for eligible plug-in hybrids; and up to £8,000 for eligible vans. There are also significant tax incentives for making the switch to electric for business users. Brent also offers free or reduced-charge parking for electric vehicles.³⁶¹

TfL and the GLA were awarded £13m in 2016 and £4.5m in 2017 from the Central Government's Office for Low Emission Vehicles' Go Ultra Low City Scheme (GULCs). Up to 1,500 standard-speed on-street charging points will be installed in the residential areas of 25 London boroughs by the end of 2020. Brent received £0.15m GULCs funding for 50-60 on-street residential charge points in lamp columns which on the basis of usual 3kW to 7kW power levels would charge between 180 and 240 EVs daily in 2018. These installations allow residents to charge their electric vehicles overnight and close to home which is an important factor in encouraging more residents to purchase electric vehicles. In June 2018, 50 requests for on-street charging facilities had been received from residents. The Council's £50,000 match funding for this project was sourced from S106 developer contributions in specific wards, Neighbourhood CIL and TfL Local Implementation Plan Funding³⁶².

³⁵⁹ DEFRA & DT (2017) UK plan for tackling roadside nitrogen dioxide.

³⁶⁰ DEFRA (2019) Air Quality programme 2018 to 2019 <https://www.gov.uk/government/news/3-million-boost-for-innovative-local-air-quality-improvements--4>.

³⁶¹ TfL (2017) Electric vehicles & rapid charging.

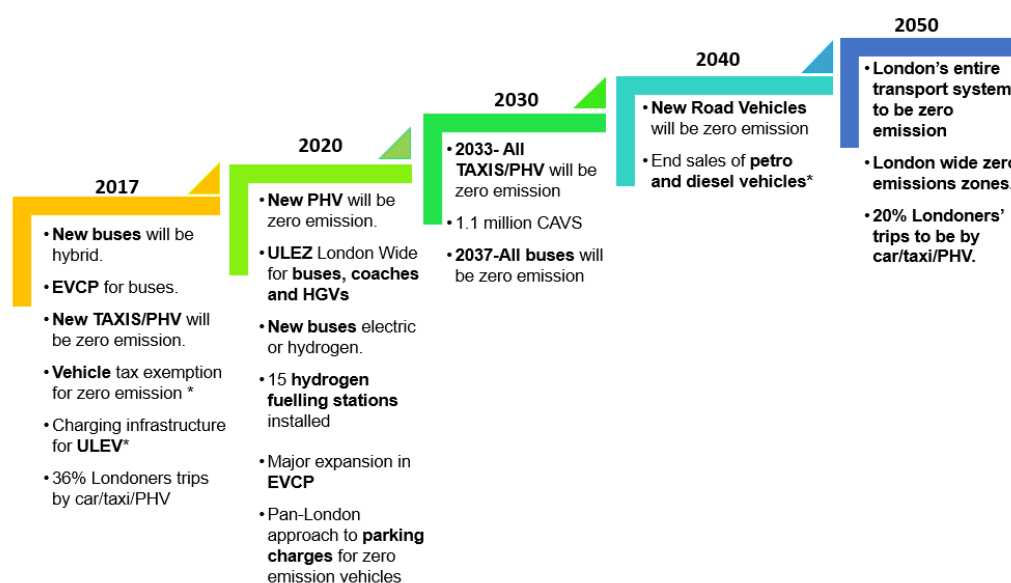
³⁶² Brent (2018) Air quality improvement measures: Electric vehicle charging infrastructure – Cabinet variation report

In 2016 Brent Council also received approval to enter into a contract with Bluepoint London network operator to provide 30 active charge points and associated electric vehicles. In February 2019 the number of Source London members had increased in Brent by 22% and the number of requests from members for charging points has also increased. Phase one of the programme is nearly complete and all of the 25 charging points are now operational³⁶³. Depending on power levels, these future EVCPs will provide capacity to charge between 90 and 1440 EVs daily.³⁶⁴

In December 2018, Lime, the urban mobility company launched their electric bikes at Brent's civic centre 1,000 Lime e-bikes were located in Brent & Ealing initially. The dockless, electric-assist bikes are equipped with a 250-watt motor and have a maximum assisted speed of 14.8 miles per hour. The electric battery reduces the effort required to cycle, making the bikes suitable and accessible for people of any age or fitness level.³⁶⁵

The Mayor of London is committed to implement a zero emission road transport program that will be completed in 2050. The main initiatives of this program and National measures to achieve a zero emission transport that will have an impact on the current infrastructure of the city and Brent are shown in figure 183.³⁶⁶

Figure 183: Mayor's Zero Emission Transport Plan



Note: (*) Measures included in the National Policy for zero emissions. Source: GLA (2017) Mayor's Transport Strategy

In London and Brent, the number of ULEVs has increased despite the limited EVCP infrastructure available. Based on employment levels, historic hybrid sales and income in Brent, the GLA estimates that by 2020 there could be between 1,208 and 2,293 ULEVs, representing 1-2% of the number of vehicles on Brent's roads, if numbers continue increasing at today's rates. By 2025 there could be between 4,786 and 8,551 ULEVs, representing 3.8%-6.8% of the number of vehicles on Brent's roads today.³⁶⁷ Despite current and forecasted

³⁶³ Brent (2019) Parking and Electric Vehicle Charging

³⁶⁴ EVCPs estimations are based on power level capacity for TfL (2017) Electric vehicle charging infrastructure: Location guidance for London and projects planned in Brent (2017) Air Quality improvements measures: electric vehicle charging infrastructure.

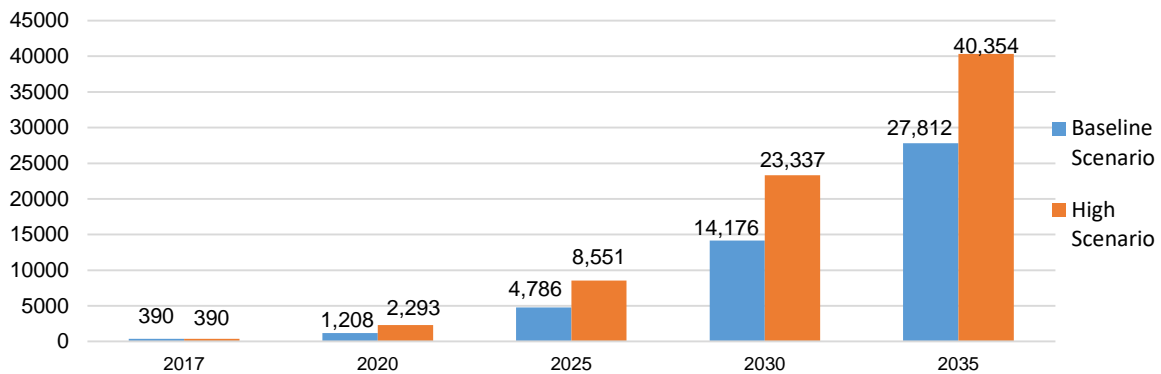
³⁶⁵ Brent (2018) Dockless electric-assist bikes cycle to Brent Press Release

³⁶⁶ GLA (2017) Mayor's Transport Strategy.

³⁶⁷ TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London: cleaner vehicles for a cleaner city.

growth in ULEVs in Brent, these numbers are still too low to meet the target that all road transport is ULEV by 2050, as shown in Figures 184 and 185.³⁶⁸

Figure 184: Forecast ULEVs in Brent 2017-2035



Source: DTS (2017) Vehicle licensing statistics VEH0131 & TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London: cleaner vehicles for a cleaner city

Figure 185: % Cars, Motorcycles and Vans ULEVs in Brent, forecast for 2017-2035 and target by 2050

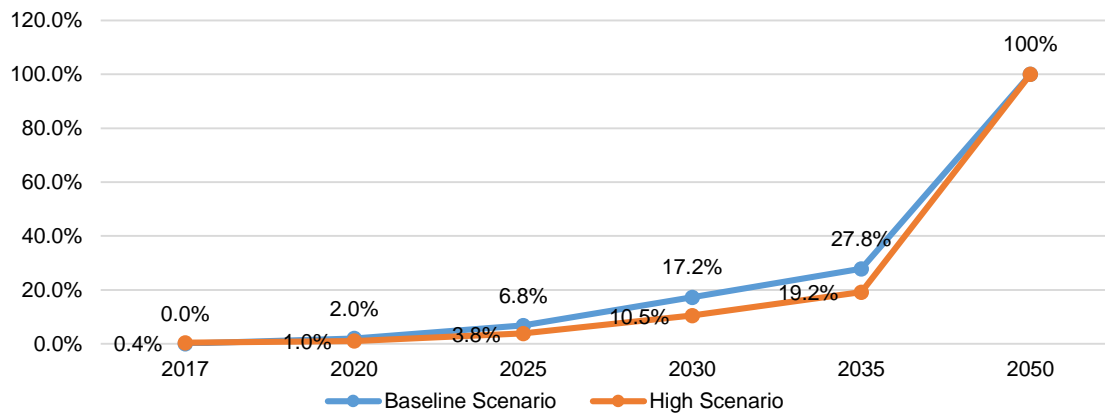


Figure 54. % Cars, Motorcycles and Vans ULEVs in Brent, forecast for 2017-2035 and target by 2050

Source: DTS (2017) Vehicle licensing statistics VEH0131 & TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London: cleaner vehicles for a cleaner city

A robust EVCP network could support increased EV ownership in Brent. ECVP infrastructure will be key to unlocking zero emission target by 2050, and intermediate stages such as zero emission capable (ZEC) for taxis and private vehicles (PHV). Given the expected number of EVs in Brent for 2020-2050 (Figure 185), forecast EVCP requirements according to power level, assuming all registered EVs in the borough are charged daily is as below (Figure 186).

³⁶⁸ Forecasts not consider a transport mode shift, only took into account economic variables that impact the consumption patterns and historical growth rates

Figure 186: Forecast EVCP in Brent, according power level, charging time and scenarios

	3kW				7kW				50kW			
	Max charging time		Min charging time		Max charging time		Min charging time		Max charging time		Min charging time	
	Baseline	High	Baseline	High	Baseline	High	Baseline	High	Baseline	High	Baseline	High
2020	403	764	352	669	201	382	151	287	33	63	25	48
2025	1,595	2,850	1,396	2,494	798	1,425	598	1,069	132	235	100	178
2030	4,725	7,779	4,135	6,807	2,363	3,890	1,772	2,917	390	642	295	486
2035	9,271	13,451	8,112	11,770	4,635	6,726	3,476	5,044	765	1,110	579	841
2050	50,324	50,324	44,034	44,034	25,162	25,162	18,872	18,872	4,152	4,152	3,145	3,145

Source: Estimations based on TfL (2017) *Electric vehicle charging infrastructure: Location guidance for London*, TfL (2015) *An Ultra-Low Emission Vehicle Delivery Plan for London: cleaner vehicles for a cleaner city* & DfT (2017) *Vehicle licensing statistics VEH0131*

Forecasts should be considered carefully as charging point usage will vary according to journey purpose and lifestyle. Not all EV owners will need to charge every day. EV ranges currently vary between 120 and 300 miles, depending on the size and battery capacity, some users may only need to charge once or twice a week, while others will need to either fully charge overnight or top up on a more frequent basis, such as taxis and PHV. Therefore, charging infrastructure should best provide a mix of residential, rapid and destination/top-up charging to serve all types of users. Planning for the locations and types of charge point needed, should consider street types, housing types, potential future uptake, likely target markets, and local priorities such as air quality hotspots.³⁶⁹

Connected and Autonomous Vehicles

Another technology promoted by central and local government is connected and autonomous vehicles (CAV), a market that is estimated will be worth £50 billion to the UK economy by 2035, with 1.1 million units sold, including cars, vans, HGVs and buses.³⁷⁰ These self-driving cars could reduce delays by 40% on the national road network, and 30% in urban areas, while making road travel safer. CAVs could also eliminate the number of road incidents caused by human error, which in 2016, was responsible for 85.9% of vehicle collisions.³⁷¹

Driverless cars are capable of sensing their surroundings and navigating without the need for human involvement, offering the potential to make better use of road space, reduce costs and increase the efficiency of goods distribution. Intelligent vehicles could bring economic and social benefits to the UK of £51 billion per year by 2030, save over 2,500 lives and prevent more than 25,000 serious accidents. Consumers will experience the greatest benefit due to the ease of travelling, which will generate wider economic benefits such as fewer accidents, improved productivity and increased trade.³⁷²

National measures to support the development of CAV technology in the UK includes:

- MERIDIAN investment programme funded jointly by Central Government and industry to accelerate the development of CAV, funding a cluster of driverless car testing along the M40 corridor between Coventry and London.

³⁶⁹ TfL (2017) *Electric vehicle charging infrastructure: Location guidance for London*, TfL

³⁷⁰ Centre for Connected and Autonomous Vehicles (2017) *Market Forecast: for connected and autonomous vehicles*.

³⁷¹ DfT (2017) Centre for Connected and Autonomous Vehicles. *Boosts for electric and driverless car industry as government drives forward green transport revolution*.

³⁷² KPMG (2015) *Connected and Autonomous Vehicles-The UK Economic Opportunity*.

- Automated and Electric Vehicles Bill proposal to install charge points across the UK and ensure safe and effective insurance for self-driving cars.³⁷³

Trend 4. Increased Technological Requirements

Central Government intervention under the Broadband Delivery UK (BDUK) initiative aimed to deliver download speeds of 24Mbit/s or more to 95% of the UK by the end of 2017, and to complete the roll-out of 4G and superfast broadband by 2020. Central government consulted on BDUK initiative in 2018 and the duties and primary objectives under the act are as follows³⁷⁴:

- to deliver the USO as quickly as possible, so consumers benefit as soon as possible;
- to ensure any designated provider can deliver services that meet the USO specifications; and
- to ensure the cost of delivery, and therefore impact on industry and consumers, are minimised.

In order to remain competitive and attractive to residents and business, London and Brent must ensure the availability of affordable high-speed internet. Though this relies on private investment, it is anticipated that demand in areas with employment concentrations such as Park Royal will exceed current broadband provision, requiring new superfast broadband networks.³⁷⁵ To deliver new broadband infrastructure it is critical to initiate dialogue with private telecommunications networks including BskyB, BT, Colt, Instalcom, Verizon, Virgin Media, Cable & Wireless and Vodafone. These companies can then deliver adequate public Wi-Fi and mobile access, secure cloud technologies, smart grid linked sensors, 5G networks and fibre connections for ultrafast broadband in Brent.

The GLA is concurrently preparing to upgrade digital infrastructure in the city to globally competitive Gigabit City standards, improving the access to residents and business and making use of ultrafast digital connections. Although, 4G coverage is not complete for the UK, London would potentially become the first capital city in the world to deploy 5G by 2020. This technology is as much as 250 times faster than 4G and can download an 800-megabyte film in one second.

The GLA commitment for 2020 is to rollout the current 4G and 3G network for 5G. To implement this change it will be important to meet the following minimum requirements indicated by the International Telecommunications Unit (ITU)³⁷⁶:

- 20Gbps peak download rate
- 10Gbps peak upload rate
- 30bps/Hz peak spectral efficiency downlink
- 15bps/Hz peak spectral efficiency uplink
- 100Mbps user experienced download rate
- 50Mbps user experienced upload rate

The GLA is similarly committed to build high-quality communication networks to provide high-speed internet access. As part of the GLA plan, partnership opportunities with communication providers, developers and others will be investigated in the early planning and delivery of the Opportunity Areas with currently low levels of connectivity.

³⁷³ Parliament (2017) Automated and Electric Vehicles Bill 2017-19.

³⁷⁴ Ofcom (2018) Consultation on designation regulations

³⁷⁵ OPDC (2016) Development Infrastructure Funding Study (DFIS): Local Plan Supporting Study

³⁷⁶ ITU (2017) ICT facts and figures 2017.

Openreach is partnering with Huawei and Nokia to support its planned rollout of broadband technology to over 10 million homes and businesses across the UK by 2020. 5G has the potential to deliver download speeds up to 330Mbit/s over Openreach's existing copper-based network.

Technology long range very-high-bit-rate digital subscriber line (VDSL) has the potential to deliver superfast speeds over longer distances than can be achieved using current fibre to the cabinet (FTTC) technologies. In theory, download speeds of up to 40Mbit/s and upload speeds of up to 10Mbit/s could be delivered using this technology to premises that currently receive much lower speeds due to the distance to their serving VDSL cabinet.

Virgin Media is in the process of upgrading its network and is beginning to offer services with download speeds of 300Mbit/s. Later versions of the technology used could support, in theory, download speeds of up to 10Gbit/s and upload speeds of up to 1Gbit/s.

Trend 5. SMART Infrastructure

The SMART city model has been conceptualised as an overarching solution to bring sustainability to cities by making them "smarter", using digital and technological infrastructure, and where access and adequate management of big data play a key role to understand population needs. Although there is not a universal definition for "SMART infrastructure" it has been framed as a system that provides evidence for informed decision-making.³⁷⁷ Therefore SMART infrastructure could provide systems that could reduce journey-times through traffic management systems; offer remote monitoring to facilitate asset management with use of specialised software and drone technology; as well as to help to find solutions to climate change mitigation, providing monitoring information about air quality, water and energy grids.

UN-Habitat indicates that in order to ensure future success of "SMART technologies", SMART city approaches should be people-centred rather than technology driven, reflecting the needs and intelligence of communities.³⁷⁸ Similarly, the SMART city strategy in London includes digital engagement with the community to understand population concerns about the city, gathering its feedback to help to improve the services offered.³⁷⁹

For SMART infrastructure, Brent's Digital Strategy aims to increase digital inclusion among its population, and transform Brent into a digital borough. The strategy includes plans to invite bids to work in partnership on radical pilot initiatives that include the use of sensors, monitors and drones in areas such as wellbeing, transport and environment³⁸⁰. Similarly, it is important to increase people and business participation through the use of social media and digital tools such as the Cleaner Brent App using data generated to design and improve future infrastructure.

Trend 6. Growing Water Demand

Water is a vital resource for any city, and frequently one that is taken for granted. Given projected population growth, London is expected to require an extra 200 million litres of potable water per day by 2025. A six-month drought order could cost businesses between £0.75 billion and £1.7 billion³⁸¹. Given the water supply is currently under stress, and the

³⁷⁷Royal Academy of Engineering (2012) Smart infrastructure: The future

³⁷⁸ World Urban Campaign (2016). The city we need 2.0

³⁷⁹ GLA (2016) The future of Smart: Harnessing digital innovation to make London the best city in the world. Update report of the Smart London Plan.

³⁸⁰ Brent Digital Strategy 2017-2020

³⁸¹ London First (2017) Water scarcity and security in London.

projections of increased pressures on the city's drainage and water supply systems, new creative approaches are required, alongside new infrastructure.

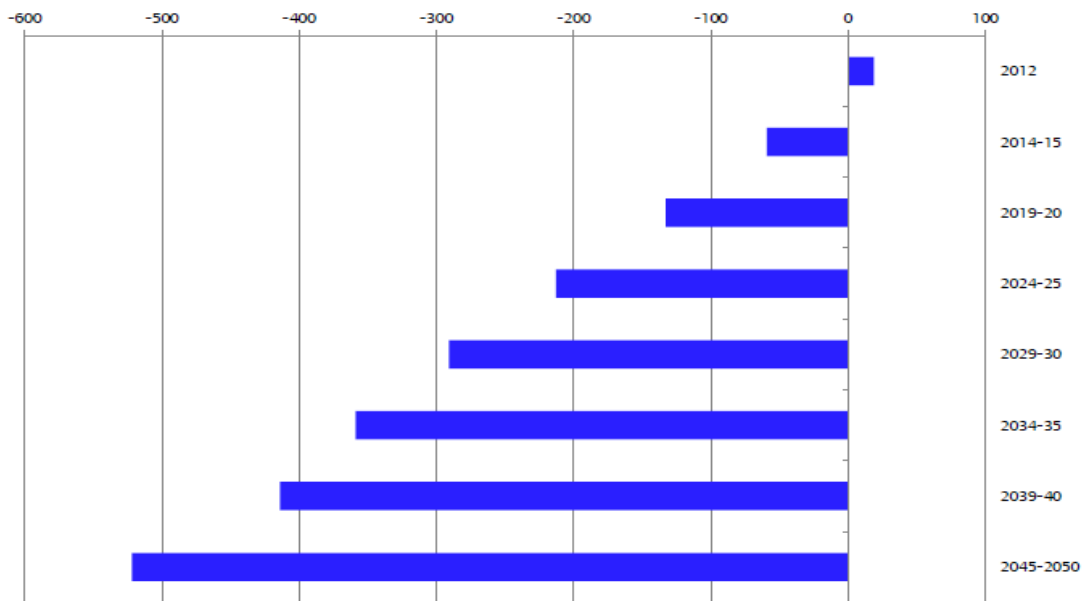
Information about Brent's future water supply and demand at a local level is not readily available, however Thames Water predicts that there will be a water shortfall of 133 million litres daily in London by 2020, equivalent to water provision for 850,000 people.³⁸² This scenario is due to worsen, with water demand predicted to exceed capacity by 10% by 2025, and by 21% by 2040.³⁸³ The GLA similarly predict that given population growth projections, without intervention, London will have a water supply deficit of over 500 million litres daily by 2050 (Figure 187).³⁸⁴

³⁸² Thames Water (2017) Media. Thames Water brings smart water meters to Brent and Hackney.

³⁸³ ICE (2016) Water Infrastructure and London's Successful Growth

³⁸⁴ GLA (2016) Economic Evidence Base.

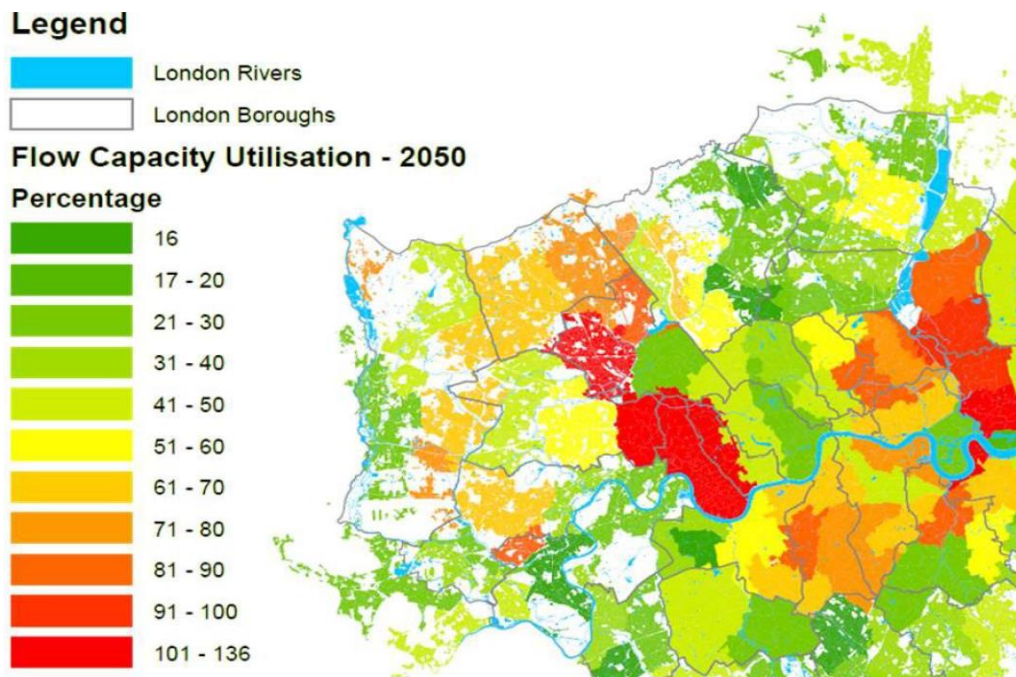
Figure 187: Expected deficit in water supply in London (million litres per day)



Source: GLA (2016) London Sustainable Drainage Action Plan with information from Thames Water

If the foul and sewer capacity of London remains constant, the risk of overflow will be critical in some areas by 2050, including the North and West areas of Brent, which would have insufficient drainage or sewage infrastructure to manage expected flows. As a result, this would lead to an increasing risk of surface water and sewer flooding. Wembley, currently the largest growth area in the borough and expected to support significant housing growth, is notably identified as an area where sewer capacity is modelled at a critical level. Figure 188 below shows flow capacity by 2050 where areas highlighted in red exceed its capacity and some flooding should be expected.

Figure 188: Modelled foul and combined sewer capacity for the 2050s.



Source: GLA (2016) London Sustainable Drainage Action Plan with information from Thames Water

OPDC additionally recognise that the future development of Park Royal will further increase the demand for potable water in the area that includes Brent.³⁸⁵

The SMART water meters implemented in Brent in 2017 will help to increase the efficiency of water use, as well as identify leaks in pipes, and thereby prevent water waste in the borough. It is however also important for Thames Water to improve the efficiency of the strategic water treatment works, water reservoirs and pumping stations.

To bridge the gap between future demand and current supply, the GLA consider that the following will be required:

- Improving water efficiency of existing development by retrofitting water efficient devices
- Incentivising people to become more water efficient by raising awareness
- Developing innovative tariffs and smart tariffs
- Including better water efficiency standards in new developments
- Encouraging innovative leakage detection and fixing.

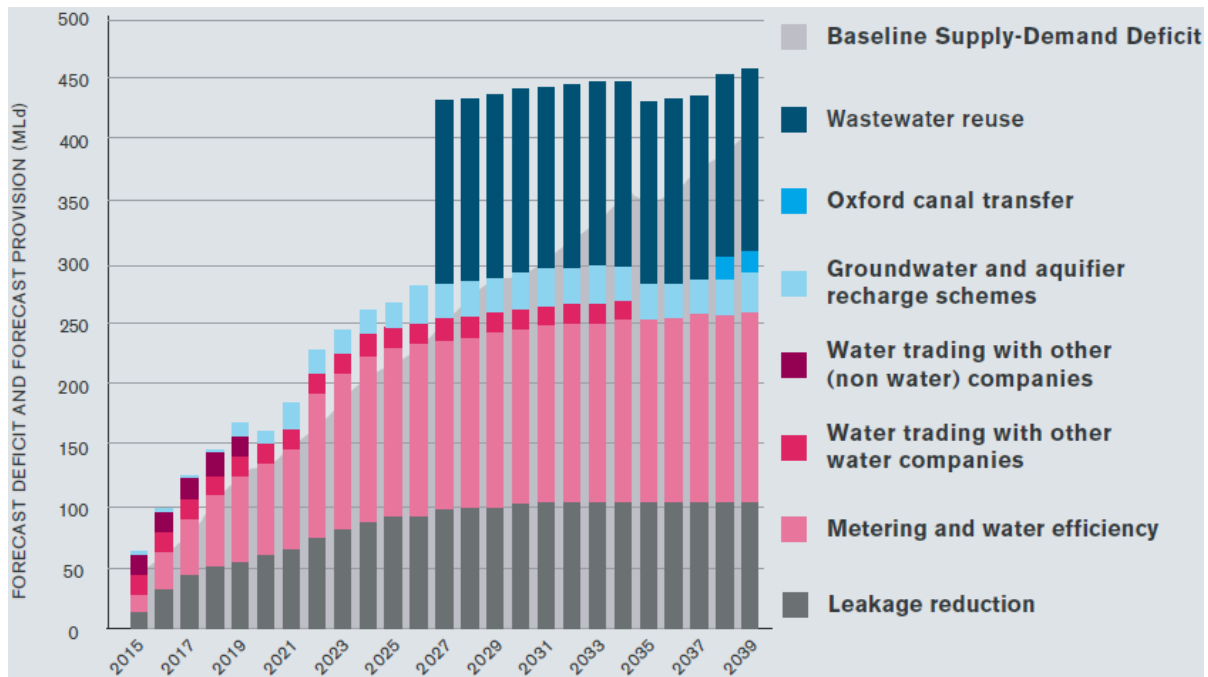
Both Central and Local Government must also encourage Thames Water to develop 25-year plans for wastewater and drainage, which should include how they plan to use sustainable drainage to extend the life of the Thames Tideway Tunnel.

Thames Water propose some measures to balance supply and demand (Figure 189) to 2020, and elaborate on their longer term plans to manage supply from 2020 to 2045. Three main options are identified to provide the major new water resource needed in the late 2020s. This will include among other projects:

- Pipeline or canal from the River Severn to “top up” London’s water supply;
- New reservoir in Abingdon
- Wastewater reuse site at Deephams or Beckton Sewage Treatment works.

³⁸⁵ OPDC (2017) Infrastructure Delivery Plan.

Figure 189: Thames Water’s proposed measures to 2020 (in million litres per day)



Source: GLA (2015) London infrastructure plan 2050

Flood risk is due to increase due to a combination of climate change, ageing flood defences, more impermeable surfaces from new development and more people and assets in areas at risk. The Mayor is set to work with the Environment Agency, London Boroughs and other stakeholders to develop a prioritised 25-year flood risk management and investment plan for each catchment area in London, covering all flood sources.

Thames Tideway is one of the projects that by 2023 will significantly reduce the pollution of the River Thames through a system that will prevent discharges from London’s overloaded sewer system into the Thames.³⁸⁶

The GLA consider green infrastructure is a requirement to mitigate the impacts of surface-water flooding and the urban heat island effect. The GLA plan to model and map the potential for retrofitting sustainable drainage across London, including green roofs, modified green spaces and increased tree canopy cover; as well as to model the likely impact of increased development on the urban heat island effect and identify the green infrastructure interventions required to avoid increased ambient temperatures³⁸⁷.

Trend 7. Increased Demand for Sustainable Energy Sources

The supply of energy to homes and businesses is critical to the functioning of the city, daily activities and the economy. Population and economic growth in London are likely to lead to an increase in energy demand and rising pressure on the energy supply.

London has some of the oldest and most energy inefficient building stock in Europe and it is expected that 80% of these buildings will still be standing in 2050. There is a need to retrofit this building stock through insulation to reduce levels of energy consumption.

³⁸⁶ Corporate Thames Water (2016) Our long-term strategy 2015-2040.

³⁸⁷ GLA (2015) London Infrastructure Plan 2050

Current national and local policy approach is to provide energy with the lowest environmental impact to achieve carbon emissions targets. This approach will increase the demand pressure of particular sources of energy, such as electricity due to future plans for the electrification of heat and transport. Energy provision and capacity from external sources is also expected to be stressed from projected population and economic growth leading to an increase, in the demand for sustainable energy sources.

Many energy storage and production methods have the potential to be used in Brent, including batteries and thermal storage, as well as solar photovoltaic (PV) technology. Council plans include the development of technologies such as a District Energy System in South Kilburn, which is a top priority project and would supply thermal energy to residential and commercial business from central energy centres. The South Kilburn project is planned to set a standard and be replicated in other growth areas after the implementation.

The Council also plans to implement solar technology on Council buildings and its housing stock. Although, solar energy could potentially balance domestic supply, investments on residential buildings are planned to be phased due to technological and investments barriers.

By 2050 London will require a 20% increase in energy supply.³⁸⁸ The GLA strategy for achieving self-sufficient energy and increased climate change resilience, includes some projects that will encourage a change of smart grid technologies towards efficient urban energy system technologies.

London is expecting to produce more than 20MW of electricity and a similar amount of heat through the implementation of heat networks capable of storage, combined heat, power plant, and 82,000 m² of solar photovoltaic panels by 2050.³⁸⁹

³⁸⁸ GLA (2016) The Future of Smart: Harnessing digital innovation to make London the best city in the world. Update report of the Smart London Plan.

³⁸⁹ GLA (2015) London infrastructure plan 2050.

Responses

Considering population growth, economic and environmental changes projected to impact Brent, its residents and businesses to 2040, and the Local Authority strategic role to plan for infrastructure to support sustainable growth; the following responses are aimed to address the main issues with current capacity and expected demand in relation to infrastructure:

- Encourage jobs and housing densification in areas with current good levels of PTAL and social infrastructure, and which will benefit from future transport improvements already planned by TfL. Continue to lobby TfL and national government to target new investment in already densely developed areas and those with potential to accommodate new growth. Brent must promote the Crossrail West Coast Mainline Link and stop at Wembley Central station, due to the significant economic benefits that would accrue from connecting into Old Oak Common, an expanded Heathrow and beyond, and the requirements to accommodate the expected density of growth in the area. In partnership with West London Alliance, Brent has successfully lobbied for the West London Orbital Railway to form part of the Mayor's new Transport Strategy, and must now press for investment and delivery to connect Neasden, Harlesden and Staples Corner, support population and employment growth across a swath of West London, and by strengthening orbital links provide a transport alternative connecting Outer London and reducing reliance on private car use.
- Transform more streets into greener public realms, where active modes of transport, walking and cycling are given greater priority. Cycling has huge untapped potential to replace many of the shorter car trips in Brent. It is important to increase dialogue with TfL and the Mayor through the Healthy Streets program that aims to improve cycling, walking and bus infrastructure, to attract local investment into Brent and develop already identified potential new routes and pathways. The Council should promote and support campaigns for road safety education, cycle loans schemes, education campaigns about personal budget savings, health benefits, and time reductions associated with walking and cycling.
- Changes in car technologies such as electric and automated cars must be planned for and associated benefits identified which include an improvement in air quality. Such technologies do not however themselves reduce the number of cars and remove congestion from the roads, and as a result could reduce productivity in the borough. To more directly address congestion, the promotion of car sharing and renting schemes could be prioritised as strategic model to make more efficient use of vehicles, particularly those with capacity to provide ULEV.
- To reduce air pollution from cars and align with the zero emission policy that aims to increase the number of ULEVs and ban petrol and diesel cars, it is important to increase participation and take up of national and local grants that are awarded directly to Local Authorities to provide appropriate EV infrastructure in Brent. Brent should similarly promote and increase communications about current available EV infrastructure in the borough. TfL future investment in EV infrastructure by borough may well correspond to levels of demand. It is therefore important to encourage the change of vehicle technology to more environmental sustainable, to increase the registration of ULEVs. Future EVCP provision should consider the cost, type and mix of technology required to satisfy the expected up to 40,000 EV users by 2038, where EVCP requirements could be up to 13,000 for slow charging points or up to 840 with rapid charging points. To minimise the investment barrier, cost should be met by operators as far as possible, particularly in more attractive and commercially viable locations, rather than subsidized by the Council³⁹⁰. In the short-term however, financial support could be required to install and operate in other areas. It is

³⁹⁰ Element energy and WSP Parsons Brinckerhoff (2016) Plug-in electric vehicle uptake and infrastructure impacts study.

therefore important to establish and develop partnerships with technology providers, such as Bluepoint London, maximise take up of national and local funding schemes, and access Community Infrastructure Levy resources. TfL funding allocations are based on perceived demand and electric vehicle take up, it is therefore important that Brent encourage EV use beyond ensuring appropriate infrastructure requirements are in place, by promoting government incentives to switch to electric cars and vans and raising awareness of the EV market so people can understand the options and benefits of EV ownership.

- Delivering ultrafast broadband speeds and technology in Brent is important to satisfy business requirements. Although, some investment is planned for denser business centres such as in Wembley and Alperton, further investment is needed in other employment hubs such as Park Royal, to maintain competitiveness and attractiveness among other boroughs. London and Brent needs the right digital infrastructure and access to realise its economic potential and benefits, which are currently failing in some areas as result of the failure of private operators to rollout digital infrastructure, and in particular broadband. It is essential that Brent lobby the GLA, BT and other operators to make this happen, encourage investment in technology and increase broadband capacity, providing evidence of 'not-spots', in order to ensure enough capacity to increase competitiveness in business areas such as Wembley, Park Royal and Kilburn. It is also important to agree new private partnerships and focus Council investment in key areas according to current and future density levels. For example, the London Borough of Camden has implemented some digital programmes in partnership with GLA and private sector that could be replicated in Brent.
- Improve water grid efficiency: Water demand information at a local level is limited and therefore it is important to increase dialogue with Thames Water to better understand the location of main water stress areas and plan to avoid future shortages. Available consumption data shows lower water consumption in metered compared to unmetered properties. With a rising deficit in water supply projected across London, the local authority has a role to play in raising awareness and changing behaviours to help people become more water efficient, as well as to ensure appropriate planning conditions and building regulations are applied and enforced for new developments, and more comprehensive water management plans drawn up for larger strategic regeneration and development.
- Increase Sustainable Urban Drainage Systems (SuDS) in new buildings and green technology. A best practice example with learnings that could be replicated in Brent is the Woodberry Downs regeneration project in Hackney, which will contain green infrastructure features including SuDS and green roofs, together with better links with nearby reservoirs and green spaces. New development however typically affects only 0.5% land each year³⁹¹ and therefore it is critical that the tide of impermeable surfaces is rolled back and SuDS integrated into existing built environments. DRAIN London have supported the design, planning and construction of 5 best practice SuDS retrofit projects across London.³⁹²
- Domestic energy use must be reduced to achieve national and local targets. Many types of energy storage and production have the potential to be used in Brent to achieve this, including solar and thermal. It is understood that technological and investment barriers could block or delay the implementation of these technologies, particularly on existing housing stock and business premises, and the Council is analysing how to overcome them. Therefore, it is important to include in this analysis potential partnerships with private developers, community leaders, charities or private investors in order to accelerate the investment on renewable sources of energy for storage and production.

³⁹¹ Mayor of London (2016) Sustainable Drainage Action Plan

³⁹² DRAIN London (2016)

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Brent Inclusive Growth Strategy (IGS): Environment

2019-2040

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Executive Summary

Looking forward to 2040, the state of the environment in Brent will be heavily influenced by both a growing population and the effects of climate change, which will increase resource demand and exacerbate resource scarcity. Without intervention, the mismatch between resource supply and demand has the potential to leave Brent residents without adequate environmental services and resources, such as water and energy.

Baseline

To adequately understand the current and future environmental conditions in Brent, the Environment Theme of the Inclusive Growth Strategy first identifies the current baseline position of Brent's environment considering: Climate Change, Energy Use, Transport & Network Management, Biodiversity & Green/Blue Infrastructure Management, Waste, and Enviro-Crime & Environmental Protection. Key findings from this analysis include:

- Half of energy consumed in Brent is for domestic use, representing the main source of CO² emissions at 44%.
- Most of Brent's energy is consumed from burning fossil fuels. Natural gas accounted for 48% of energy use in 2016; while electricity represented 31% and petroleum products represented 20%.
- In 2017-18 Brent Council exceeded its 4 year 15% target reductions in CO² over 2014-18, achieving 15.6% savings.
- Air quality in London and Brent has improved in recent years. However, updated pollution concentration data still shows exceedances of the annual EU limit values.
- Greatest roadside annual mean NO² concentrations occur along the North Circular Road
- Motorised vehicles are the main mode of transport in Brent: latest 2017 data shows 45% were made by private motorised vehicles, 20% by bus, 32% walking and only 1% cycling
- From 2009 to 2016 the number of vehicles registered in Brent increased by 4.5%. Although, from 2013 to 2016 Brent has the lowest car ownership rate in Outer London with an average of 0.7 cars, and the number of vehicles registered in Brent decreased by 1.1% between 2016 and 2018.
- Brent has a lower percentage of green space when compared to the London average, at 21.9% in Brent versus 38.2% across Greater London.
- Over 50% of Brent households live further away from the nearest green space than the 400m maximum recommended distance in the London Plan.
- 36% of household waste in Brent was sent for recycling/compost in 2017-18.
- Brent is amongst the top 4 London boroughs with the highest rates of employment in the circular economy.
- 195,000 tonnes of waste is managed in Brent per annum, representing 3.4% of London's waste.
- Last year in Brent, there were more than 315 enforcement actions to tackle ASB, the most common including: casual labour market activities, street drinking, drug dealing, prostitution and begging.

Trends

In the context of growth projections, changing demographics and income levels, regeneration of the borough, Brent's diversity and changing lifestyles, anticipated trends must be considered for the Inclusive Growth Strategy (IGS) to understand how the environment will be impacted in the future and how the borough may reduce such impacts. Key trends that will affect environmental aspects of inclusive urban growth in Brent include:

1. Climate change, rising temperatures and environmental impacts
2. Increased resource consumption
3. Increased demand for sustainable transport and car use
4. Increased demand for environmental recreation
5. Low Carbon Circular Economy
6. Data use to improve climate change through Smart Cities technology
7. Reduced enviro-crime and ASB working with communities

Although these trends pose significant challenges to Brent, it is possible to reframe these challenges as opportunities through the provision of innovative green infrastructure and sustainable urban design in the future. By embracing the challenge of climate change and addressing environmental needs in Brent, the borough can simultaneously gain health, connectivity and economic benefits, making Brent a better place to live and improving well-being for all residents.

Responses

This report concludes with proposals that could be taken forward to address the challenges and seize the opportunities to integrate environmental sustainability into urban growth. Proposals highlight the need to research and capture data on environmental conditions moving forward, to ensure the borough can adequately respond to the challenges of climate change, growing populations, and resource scarcity and provision into the future. Headline responses surround the need to deliver sustainable transport, tackle climate change reduce carbon emissions and pollution, oversee a transformation in the energy mix, develop the circular economy, and support blue and green infrastructure. Responses include:

Construction represents a growing source and proportion of air pollution. It is therefore critical to reduce the pollution generated both on and off construction sites. New clean technology has the potential to replace ageing fleets of diesel diggers, excavators and inefficient generators and lighting rigs. Offsite factory manufacture can drastically reduce waste materials, noise, dust and litter on site – and reduce defects and shorten build times. The Council can better recognise innovation in building technology and cleaner construction when procuring development partners to deliver regeneration and development across the borough.

The circular economy model shows positive impacts in London, including Brent, building economic, natural and social capital, and having the scope to reduce CO² emissions and environmental impacts. Potential innovations include increasing emphasis on reducing carbon emissions through the use and reuse of resources before they become waste, including the manufacture of goods to higher quality standards, and the establishment of clean-tech hubs in borough strategic industrial locations including Park Royal and Wembley.

To deliver a zero carbon city by 2050. Brent must not only maximise energy efficiency in the built environment and encourage behavioural change in energy use by consumers, but oversee a transformation in the energy mix. The Council has the opportunity to take a leadership role by increasing the use of renewable energy sources on its own assets, and in securing more localised and sustainable energy networks in major new regeneration and development schemes.

Introduction

Looking forward to 2040, the state of the environment in Brent will be heavily influenced by both a growing population and the effects of climate change, which will increase resource demand and exacerbate resource scarcity. Without intervention, the mismatch between resource supply and demand has the potential to leave Brent residents without adequate environmental services and resources, such as water and energy.

For the environment, Inclusive Growth in Brent means finding sustainable solutions to provide adequate resources and environmental services to Brent's residents, while minimising resource consumption and utilising environmental resources as efficiently as possible, to ensure that the needs of Brent's population will be met in 2040 and beyond. Particular consideration must be given to climate change, energy use, transport & network management, biodiversity & green/blue infrastructure management, waste and enviro-crime & environmental protection.

These sub-themes are addressed separately in this document, although it is essential to understand that each of them have significant overlap. The suggested solutions for future development must also take cross-theme integration into account, and the other chapters in the Inclusive Growth Strategy are inter-related. Economy, Infrastructure, Education, Housing, Health and Culture must all be considered in conjunction with environmental issues in Brent, in order to adequately improve environmental resources in the borough.

To formulate proposed solutions, this report analyses the Environment Theme of the Inclusive Growth Strategy in three sections:

- The first section describes the current baseline position of Brent's environment.
- The second section identifies and analyses anticipated changes in the form of environmental trends and projections in Brent and wider London.
- The third section, based on the trends identified, suggests policy responses and actions that could be taken to address the challenges and seize the opportunities to protect, enhance and enjoy the environment in the future.

Baseline

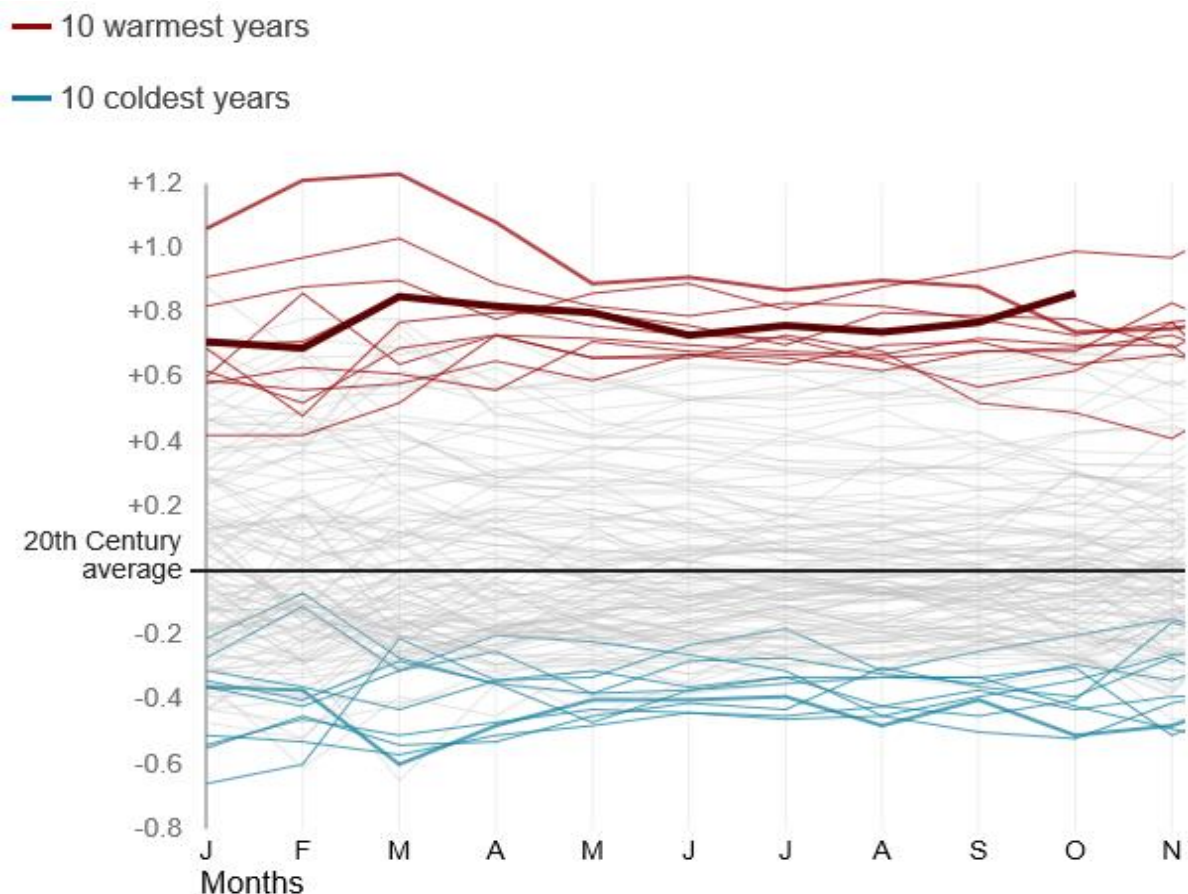
As the population and economy continue to grow, London and Brent face several environmental challenges that threaten the future of its citizen's health and wellbeing, and economic performance. The city is forecast to have more frequent and intense episodes of extreme weather, detriments in its air quality; risk of water shortages, over-reliance on fossil fuels, gradual loss of green space, increased demand for energy and the infrastructure required to distribute it.

To understand the scale of the environmental challenges to be addressed as we move forward to 2040, this section analyses the present environment situation for Brent and London.

Climate Change

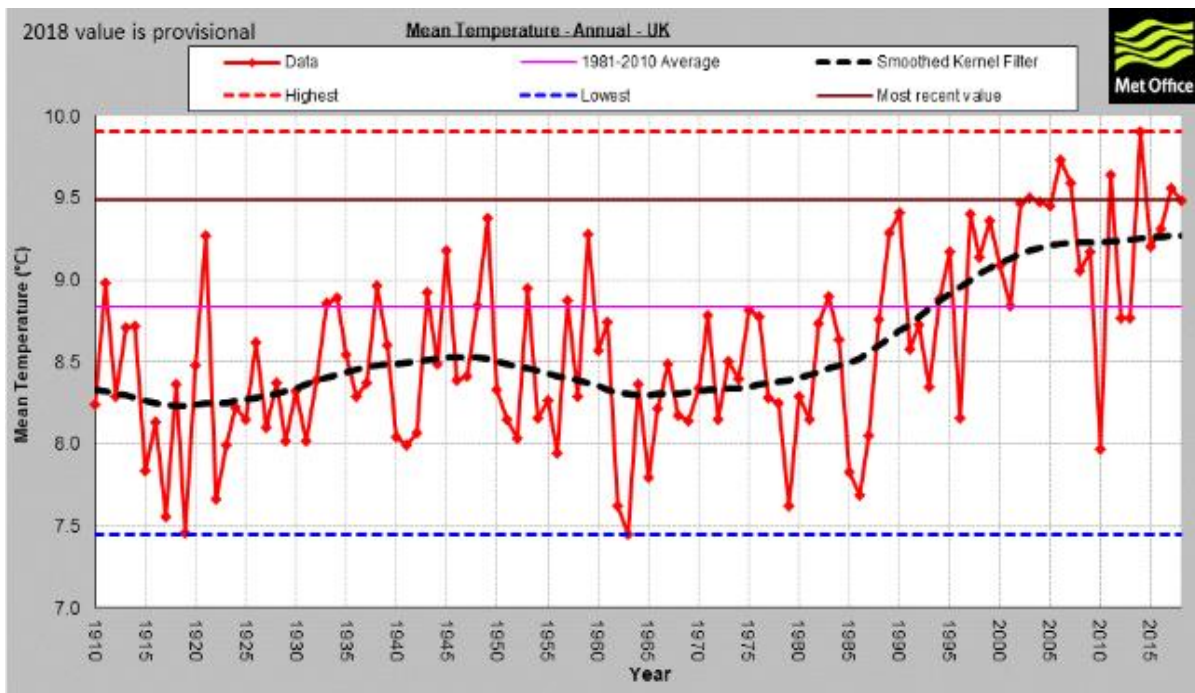
In London climate conditions are already changing and are expected to continue with warmer, wetter winters, and hotter, drier summers. The consequences of climate change have far reaching implications that affect aspects of everyday life, through flooding, heat risk and drought. The 20 warmest years on record have been in the past 22 years, with 2015-2018 making up the top four.

Figure 190: How years compare with the 20th Century average global



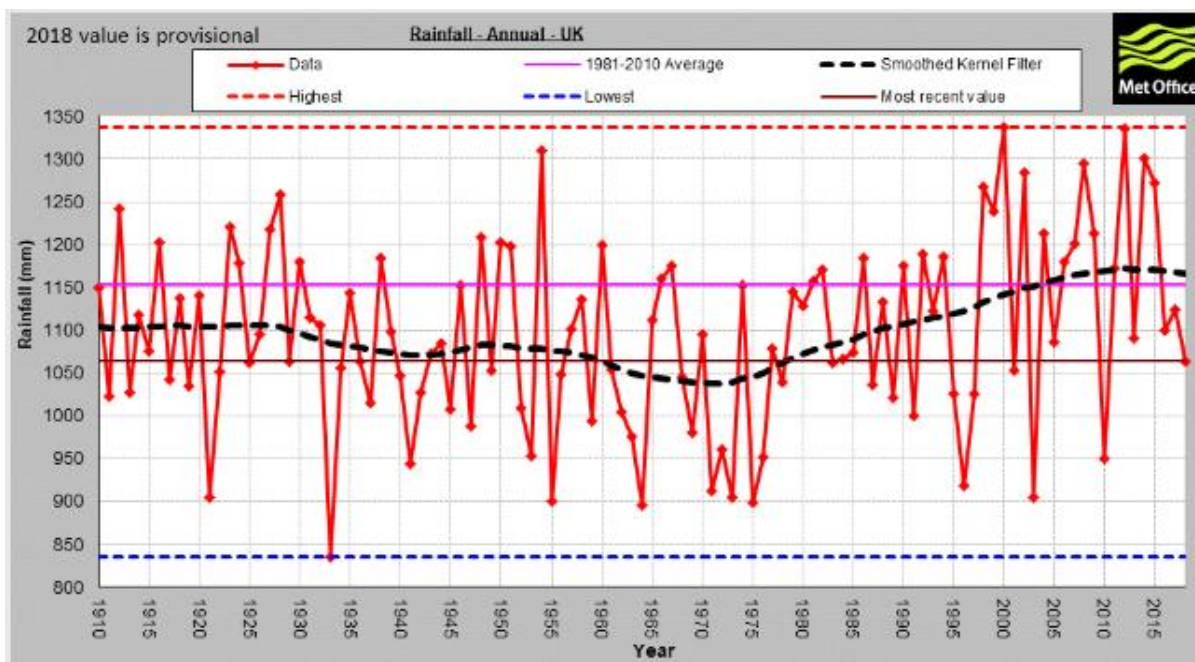
Source: Met Office

Figure 191: Annual Mean Temperature 1910-2015 England



Source: Met Office

Figure 192: Annual Rainfall UK 1910-2015 England



Source: Met Office

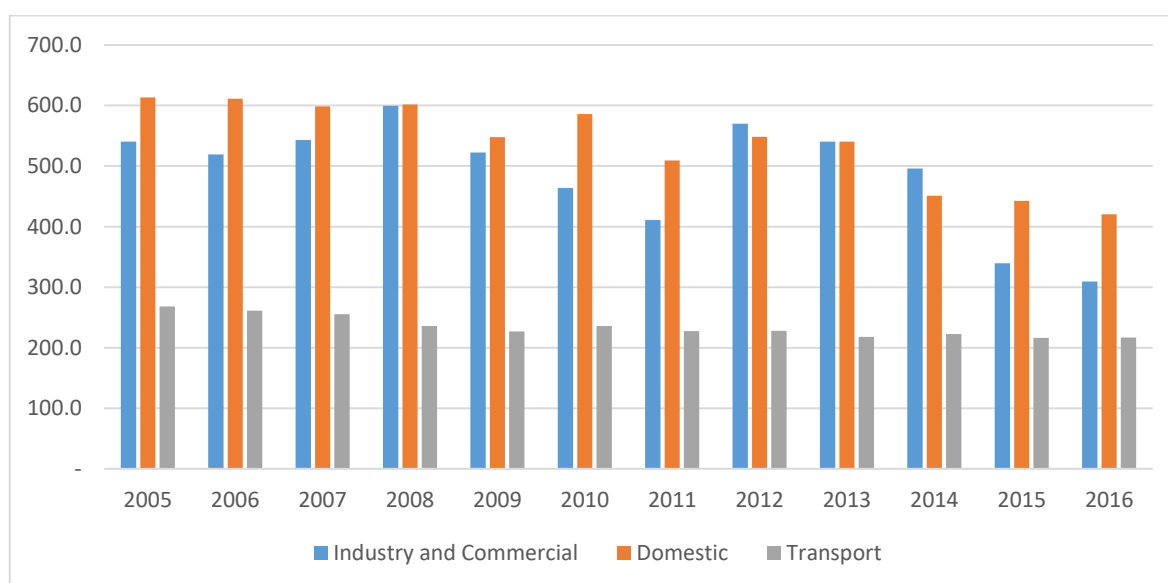
Greenhouse gas emissions (GHG), which have historically caused climate change, are being reduced in UK and London. However, current over-reliance on fossil fuels for energy production and transport use and resultant carbon dioxide (CO₂) emissions is now the main contributor to climate change. London is responsible for 8.7% of national emissions and Brent for 0.8%.³⁹³

³⁹³ BEIS (2018) UK local authority and regional and carbon dioxide emissions national statistics.

In London, Mayoral and central government policy targets an 80% reduction of CO₂ emissions by 2050, relative to 1990 levels. In line with the Paris Environmental Agreement, central government has also indicated it intends to set a UK target for reducing domestic emissions to net zero. In London and Brent, homes and workplaces are currently the biggest-emitting sectors, with transport responsible for less than a quarter of emissions. The Mayor's Climate Change Mitigation and Energy Strategy (CCMES) states that all sectors must reduce emissions, with homes and workplaces to reduce the most, and transport to reduce the least.³⁹⁴

In 2016, Brent CO₂ emissions had declined 31% over the past 10 years (Figure 193) and accounted for 3% of London CO₂. In 2016 the domestic sector represents the largest source of emissions, accounting for 44.4% of carbon emissions in Brent. Industrial and commercial emissions accounted for 32.6%, while transport accounted for 22.9% of emissions.³⁹⁵

Figure 193: Historic CO₂ emissions for sector in Brent



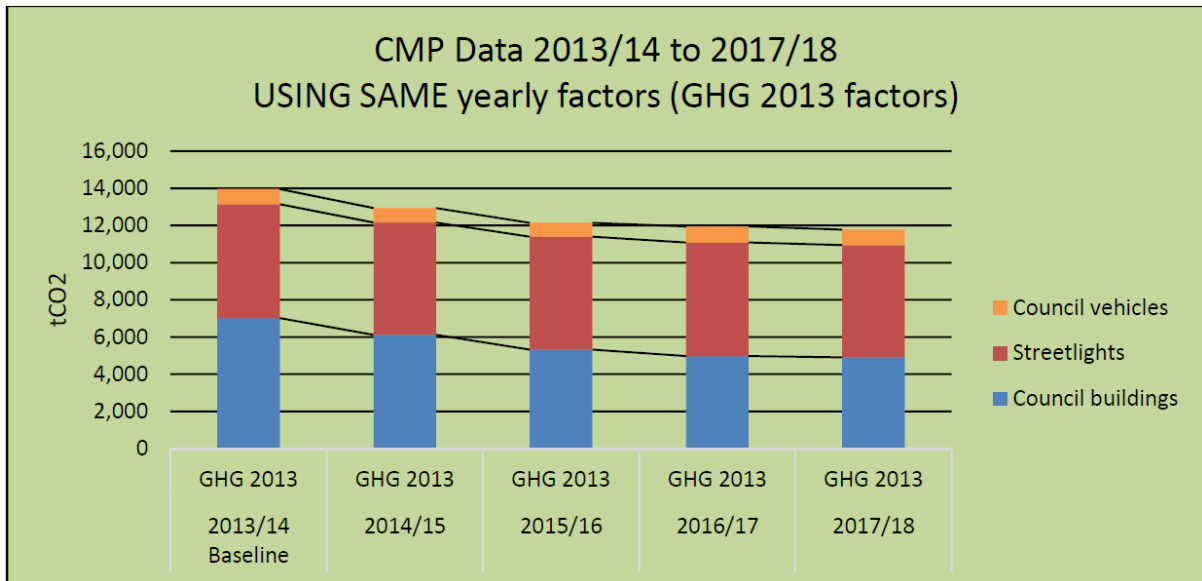
BEIS (2018) UK local authority and regional and carbon dioxide emissions national statistics.

Brent Council is concerned about the importance of reducing CO₂ emissions to meet national and international environmental targets. Therefore, in line with national and local policies, since 2007 Brent has implemented a Carbon Management Programme (CMP) which aims to reduce emissions from Council assets. This programme has included introducing street lampposts with LED technology, reducing electricity energy consumption. Council housing stock is also targeted for this programme, but the cost of management and design are the main barriers delaying implementation. Brent's CMP targeted a 15% reduction in CO₂ over the 4 years 2013/14 to 2017/18. The Council has slightly exceeded this target (Figure 194) and has achieved 15.6% savings over the period.

³⁹⁴ The Mayor's Climate Change Mitigation and Energy Annual Report, 2013-14

³⁹⁵ BEIS (2018) UK local authority and regional and carbon dioxide emissions national statistics.

Figure 194: Brent Carbon Management Programme

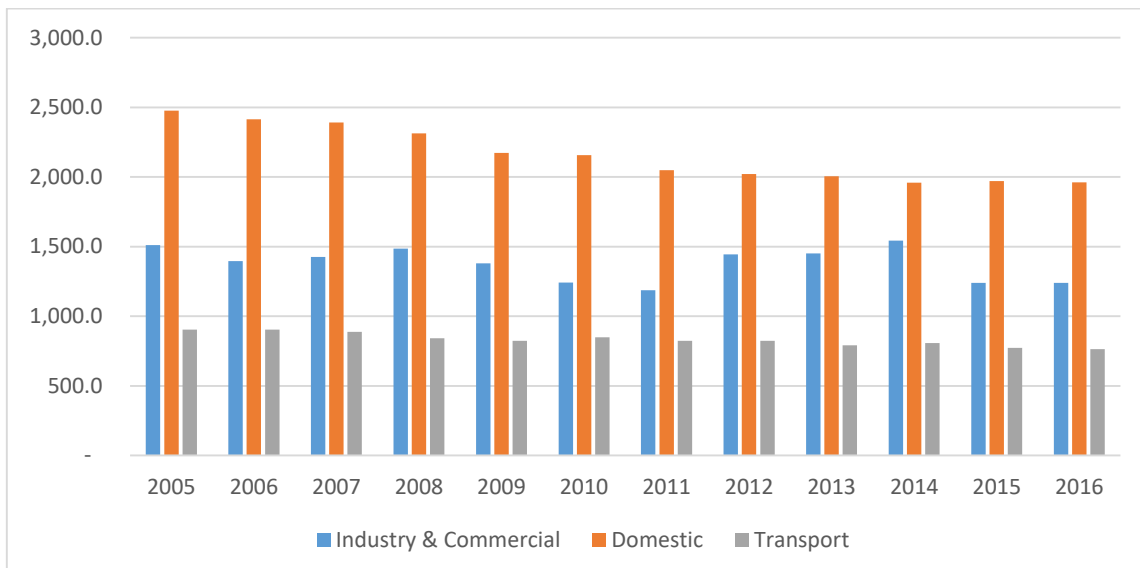


Source: Brent (2018) Carbon Management Programme CO2 Emission Report 2017/18.

Energy use

In Brent, energy consumption has reduced over the past 10 years (Figure 195), however reliance on fossil fuels still drives CO₂ emissions. In 2016, approximately 44.5% of all energy was consumed in people’s homes, 32.6% in industry and commerce and 22.9% in transport. Brent was the 7th largest consumer of domestic energy in London.

Figure 195: Historic Energy Consumption in Brent



BEIS (2019) UK local authority and regional and carbon dioxide emissions national statistics.

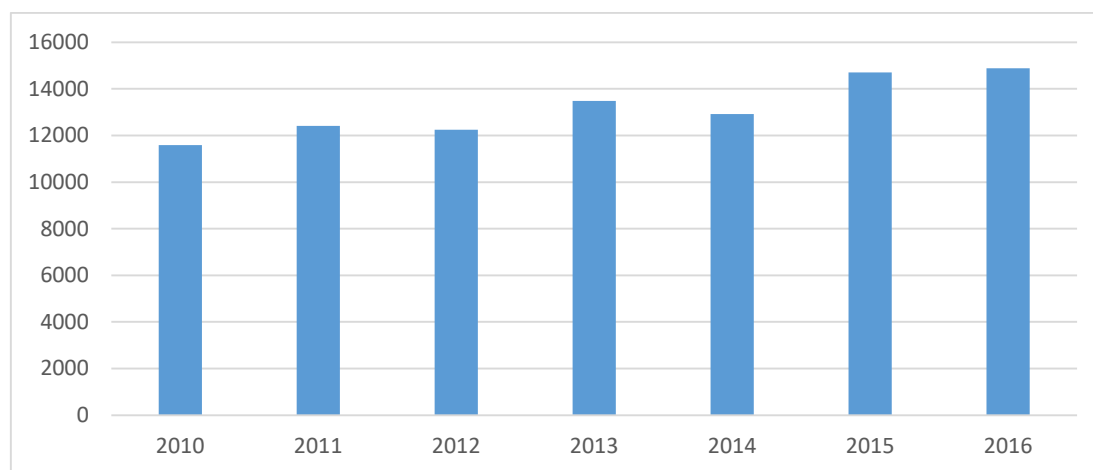
Most of Brent’s energy is consumed from burning fossil fuels. Natural gas accounted for 47.8% of energy use in 2016; while electricity represented 31.3% and petroleum products

represented 20.3%.³⁹⁶ Natural gas is mainly used to heat spaces and water for domestic consumers. Electricity is mainly used for commercial and industrial users, and petroleum used in road transport.

Brent Council is also committed to tackling fuel poverty in the borough, and developing a Fuel Poverty Strategy to address this issue. Households are considered by the Government to be in fuel poverty if they would have to spend more than 10% of their household income on fuel to keep their home in 'satisfactory' condition. According to the Department of Energy and Climate Change, there are three main factors which lead to fuel poverty: poor energy efficiency in the home, high energy prices, low household income. The elderly, children and those with a disability or long-term illness are particularly at risk of poor health outcomes as a result of living in a cold home. Evidence shows the significant impacts that cold housing can have on the population in terms of cardio-vascular and respiratory morbidity.³⁹⁷

In Brent the proportion of total households living in fuel poverty reached 12.9% in 2016, increasing 22% between 2010 and 2016 (Figure 196). It is important to consider measures that could reduce this rate moving forward.³⁹⁸

Figure 196: Number of fuel poor households in Brent



Source: BEIS (2018). Sub-regional fuel poverty data 2018.

Therefore, in line with the London Environment Strategy, Brent is committed to reduce carbon emissions, increase the efficiency of its energy sources, and encourage the implementation of green technology. Additional to the CMP, since 2007 the Council has received more than £700,000 of funding from NPO Salix Finance to provide energy efficiency through 61 projects saving 1,325 tonnes of annual CO₂. Since 2004 Brent has also been a beneficiary of the REFIT programme funded by the GLA and the European Regional Development Fund. This funding was utilised for the installation of Energy Conservation Measures (ECMs) in three schools and four corporate buildings at Brent, with an investment of more than £300,000, although this only represents 33% of the total loan approved 13 years ago.³⁹⁹

Air Quality

Air quality directly impacts people's health and the economy, therefore in London and Brent cleaner air has been a priority to increase community wellbeing and address climate change. For the last 15 years Brent Council has implemented several measures, which include the

³⁹⁶ BEIS (2018) Total final energy consumption at regional and local authority level.

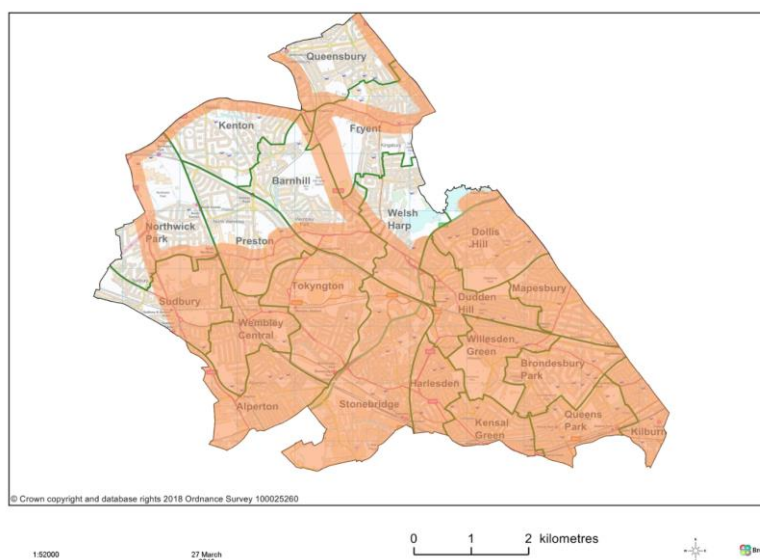
³⁹⁷ Brent (2016) Joint Strategic Needs Assessment (JSNA) 2015/2016.

³⁹⁸ BEIS (2017) Sub-regional fuel poverty data 2018.

³⁹⁹ Brent (2014) Report from the Strategic Director of Regeneration and Growth. Brent REFIT Programme.

establishment of specific areas to monitor through the Local Air Quality Management (LLAQM) programme (Figure 197) which covers the vast majority of London.

Figure 197: London Borough of Brent Air Quality Management Areas (AQMA)



Source: Ordnance Survey.

Air quality in London and Brent has improved in recent years, as a result of policies to reduce emissions, primarily from road transport, and is projected to improve moving forward to 2030. Policies implemented in Brent include improving cycling infrastructure with the development of the first lightly segregated route on Carlton Vale; parking permit charges modified where the most polluting vehicles pay more; and, upgrades to local air quality monitoring points⁴⁰⁰. Future policies are included in Brent's Air Quality Action Plan 2017-2022⁴⁰¹.

The largest contributors to poor air quality in Brent are road transport, construction and local energy generation. Although road transport emissions have reduced in recent years, updated pollution concentration data in Brent still shows exceedances of the annual national and EU limit values for Nitrogen Dioxide (NO₂) and Particulate Matter (PM₁₀) (Figure 198)⁴⁰². NO₂ and PM₁₀ are linked to 9,500 early deaths in London each year.⁴⁰³

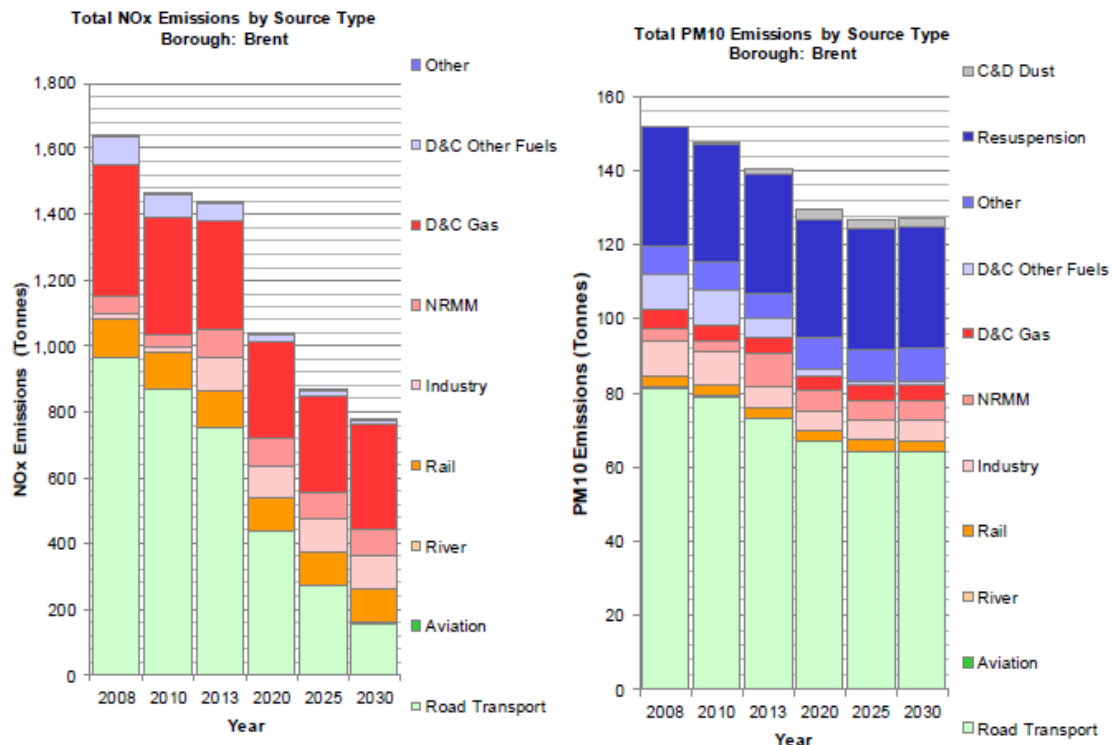
⁴⁰⁰ Brent (2017) Report from the Strategic Director of Regeneration and Environment. Air Quality Action Plan (2017-2022).

⁴⁰¹ Brent (2016) Air Quality Action Plan (2017-2022).

⁴⁰² London Datastore (2016) LLAQM bespoke borough by borough 2013 air quality modelling and data. April 2016 update.

⁴⁰³ Kings College London (2015) Understanding the Health Impacts of Air Pollution in London

Figure 198: Brent Air Quality Management



Concentrations of NO₂ and PM₁₀ occur in several hotspots in the borough that correspond to known traffic congestion areas. Model results from the Air Quality Assessment and Air Quality Management Areas (AQMA) reviewed in 2016 indicate that the greatest roadside annual mean NO₂ concentrations occur on the North Circular Road A406 (Figure 199).⁴⁰⁴

Figure 199: NO₂ annual mean concentrations 2016 (base year 2013)

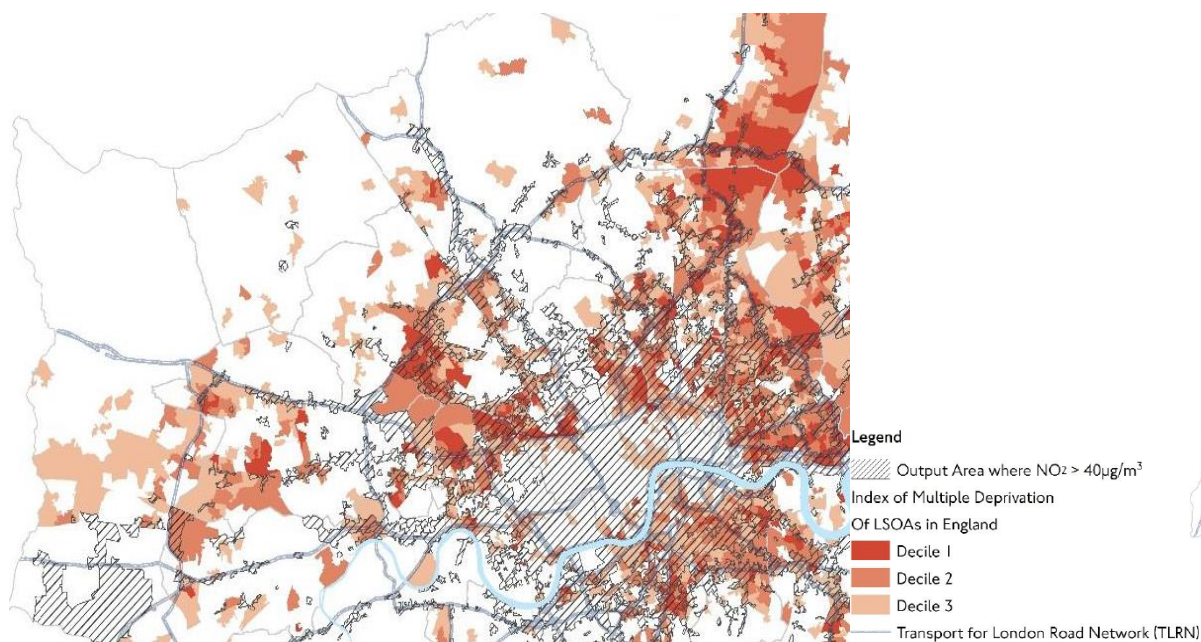


Source: Data Store (2016) London London Atmospheric Emissions Inventory 2013 Air Quality Focus Areas - 2016 update.

⁴⁰⁴ London Datastore (2016) London Atmospheric Emissions Inventory (LAEI) 2013 Air Quality Focus Areas - December 2016.

Analysis of air pollution in London indicates that 11% of the schools and educational institutions in Brent are in locations where average concentrations exceeded the NO₂ EU limit value (40 µg/m³ annual average) and 68% of the most deprived population were exposed to the worst air quality areas in the borough (Figure 200)⁴⁰⁵.

Figure 200: Locations of 30% most deprived LSOAs vs. locations of exceedances to NO₂ limit value, 2013



Source: Aether (2017) Updated London Air Pollution Exposure.

Diesel vehicles are currently the highest contributor to road transport pollution in London, emitting local particulates such as PM₁₀ and PM_{2.5} which are known to be significant contributors to ill health. Reducing private car dependence and switching to more sustainable modes of transport are the main methods targeted to reduce diesel emissions and particulate matter. It is also important to reduce emissions from freight by encouraging a switch to lower emissions vehicles, and to adopt practices that reduced freight movements.

Transport for London (TfL) has introduced initiatives to reduce air pollution caused by road transport. The Emissions Surcharge or Toxicity Charge, commonly known as the T-charge programme, discouraged the use of older polluting vehicles, through charging those not meeting minimum European emissions standards circulating in central London. The T-charge was the forerunner to the Ultra-Low Emissions Zone (ULEZ), a 24-hour charging zone programme that came into force on the 8th of April 2019 in Central London. Current plans propose that from the 25th of October 2021 the ULEZ boundary will be extended to create a single larger zone bounded by the North and South Circular Roads. This extensions would include the whole of south of the borough.

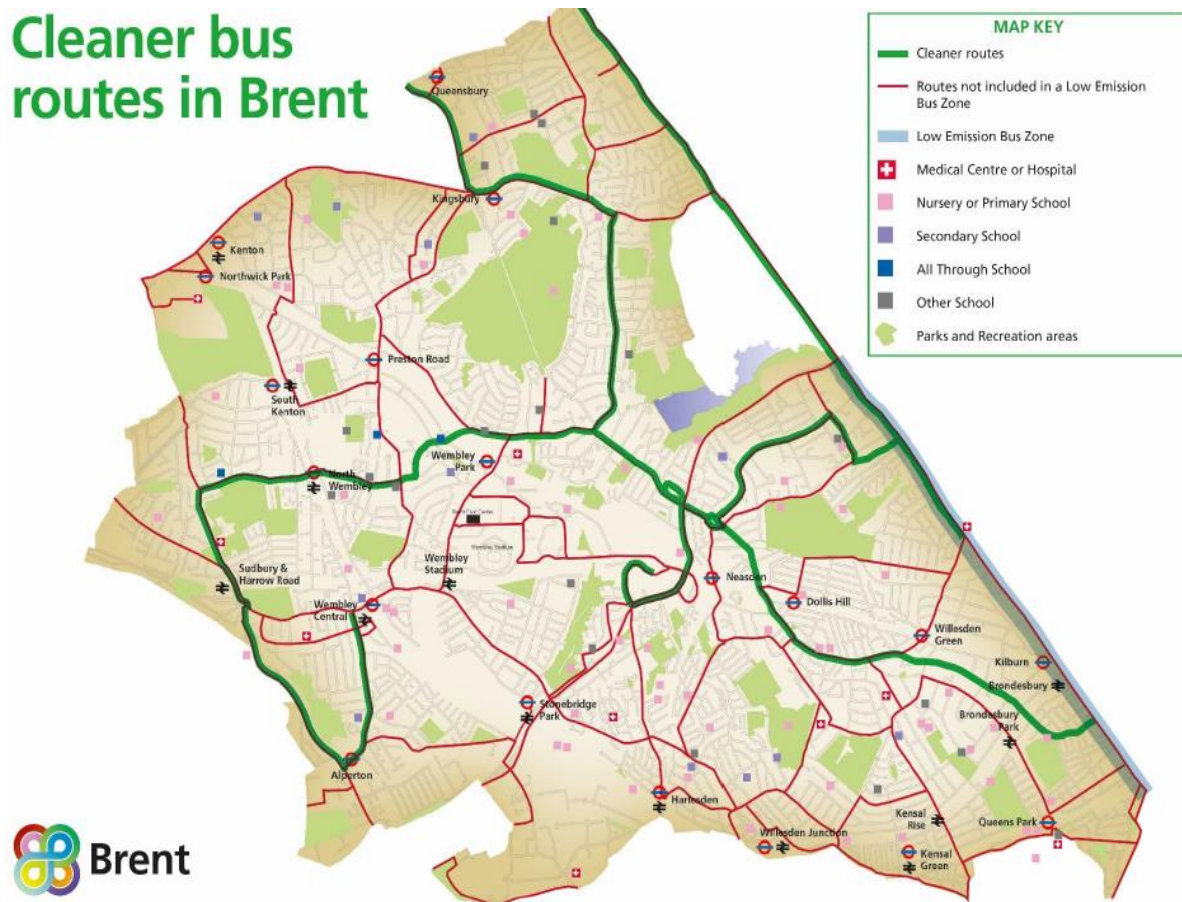
Reducing private car dependency and switching to more sustainable modes of transport is the main objective to achieve a modal shift towards a more environmentally-friendly transport mix. However, it is also important that current public transport modes become more environmental friendly. TfL has therefore started a programme of technology transformation to extend cleaner bus routes, mainly in areas considered to be hotspots of harmful emissions, some of which are in Brent. This programme is due to complete by 2020 and will include 17% of Brent's bus

⁴⁰⁵ London Datastore (2016) Analysing Air Pollution Exposure in London.

routes using cleaner buses in Low Emission Bus Zones (LEBZs), including the Edgware Road route in Brent's boundary; the route from Cricklewood Broadway via Shoot-Up Hill to Kilburn High Road. 5% of the Brent's bus routes will be served by the Ultra-Low Emission Zone (ULEZ) and by hybrid vehicles. Consequently, nearly a quarter of Brent's routes will be low emission buses (Figure 201) ⁴⁰⁶

Figure 201: Cleaner Bus Routes in Brent

Cleaner bus routes in Brent



Source: Brent 2017 Cleaner and greener bus routes.

Transport & Network Management

Transport in Brent is responsible for a significant proportion of both carbon emissions and air pollution, and encouraging the use of clean vehicles and green modes of transport is a government priority. Brent residents make 2.3 trips per person per day, with only 30% of trips made on public transport.

Public transport in Brent includes:

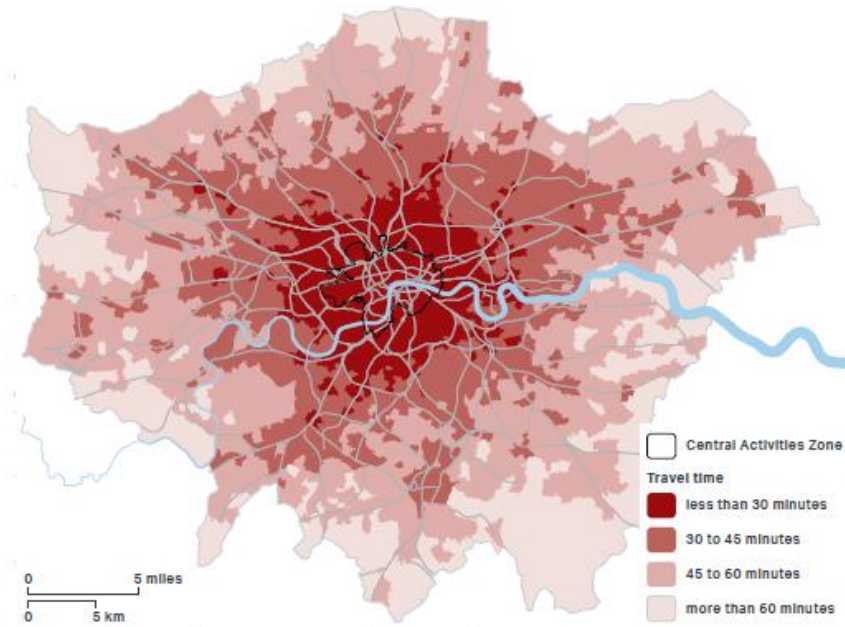
- 58 bus routes, 7 of which are night buses.
- 25 Underground stations, with currently only 3 stations with step free access at Wembley Park, Kingsbury, and Kilburn (and step free access now planned for Park Royal). Brent has direct access to Jubilee, Piccadilly, Metropolitan and Bakerloo Underground lines. Jubilee line with night service during weekends.
- 3 Overground stations with access to Euston-Watford Junction and Richmond, Clapham Junction Overground routes.

⁴⁰⁶ TfL (2017) Improving buses.

- 4 National Rail stations offering direct links to Marylebone and out-lying destinations such as Birmingham/High Wycombe

In Brent, public transport allows relatively high accessibility by public transport within 45 generalised minutes (Figure 202).

Figure 202: Public transport travel time to the Central Activities Zone, 2015

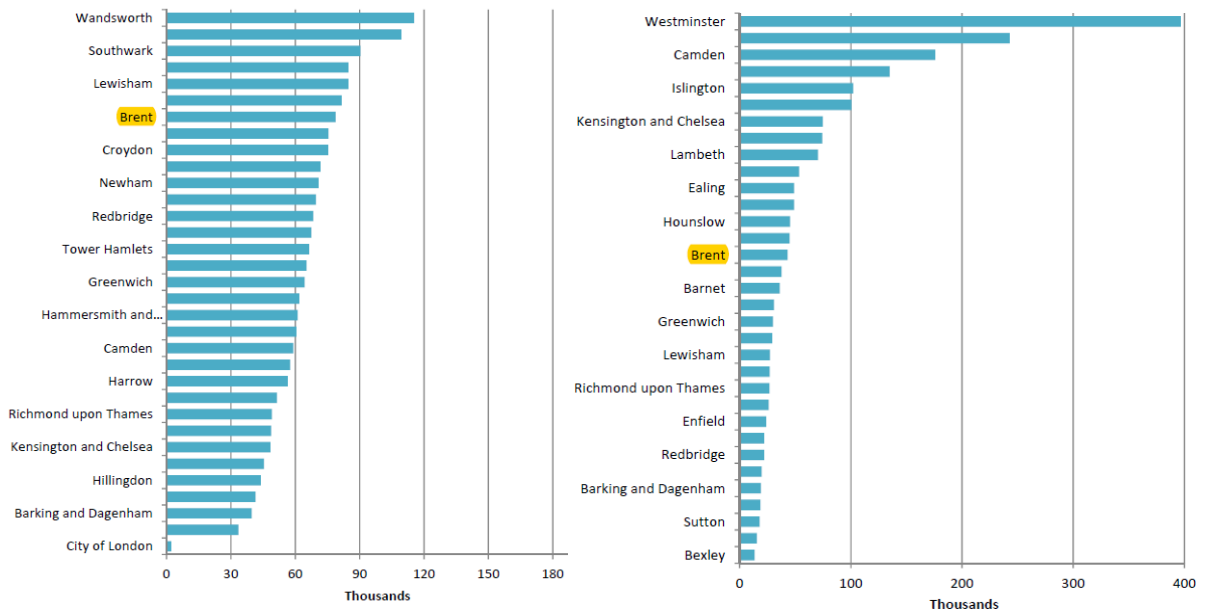


Source: GLA (2018) Mayor's Transport Strategy

Brent is well connected to Central London, however it is poorly connected to other Outer London Boroughs and to London Heathrow Airport, despite relatively close geographic proximity. Brent is therefore seen to have strong radial public transport links to Central London, but much weaker local orbital ones to the other West London boroughs.

The distance of trips by underground originating in Brent are on average 11.75 km, representing a large outflow of commuter trips to Central London. Census data shows commuting outflow in Brent heavily outweighs commuting inflows, ranking 7th out of the 33 London boroughs for commuting outflows (Figure 203).

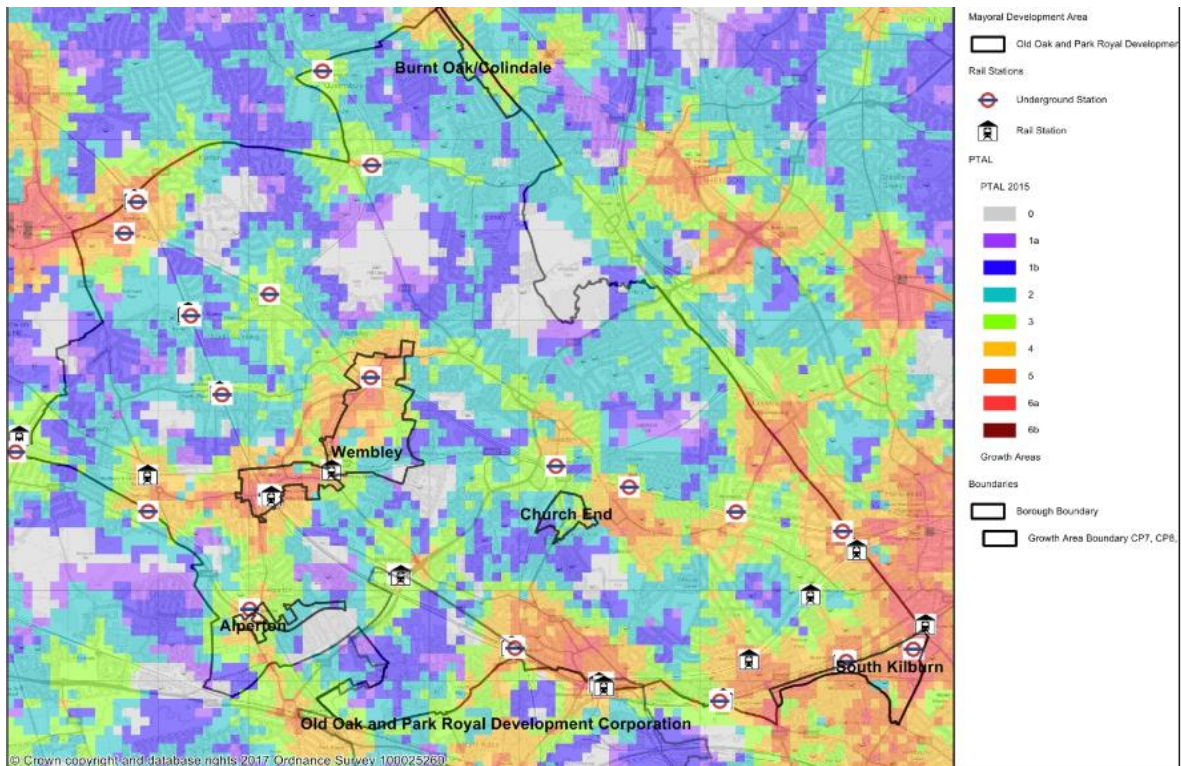
Figure 203: Commuting outflows (left) and inflows (right) within London



Source: GLA Intelligence (2014) *Commuting in London Report 2014*, 2011 Census table WU01EW

Transport access in London and in Brent is measured by Public Transport Accessibility Levels (PTAL) which indicate a significant difference in accessibility within the borough, with the central and southern wards of Brent in red and orange representing the best connected neighbourhoods. While northern wards in blue have lower PTAL (Figure 204).

Figure 204: Brent PTAL 2015

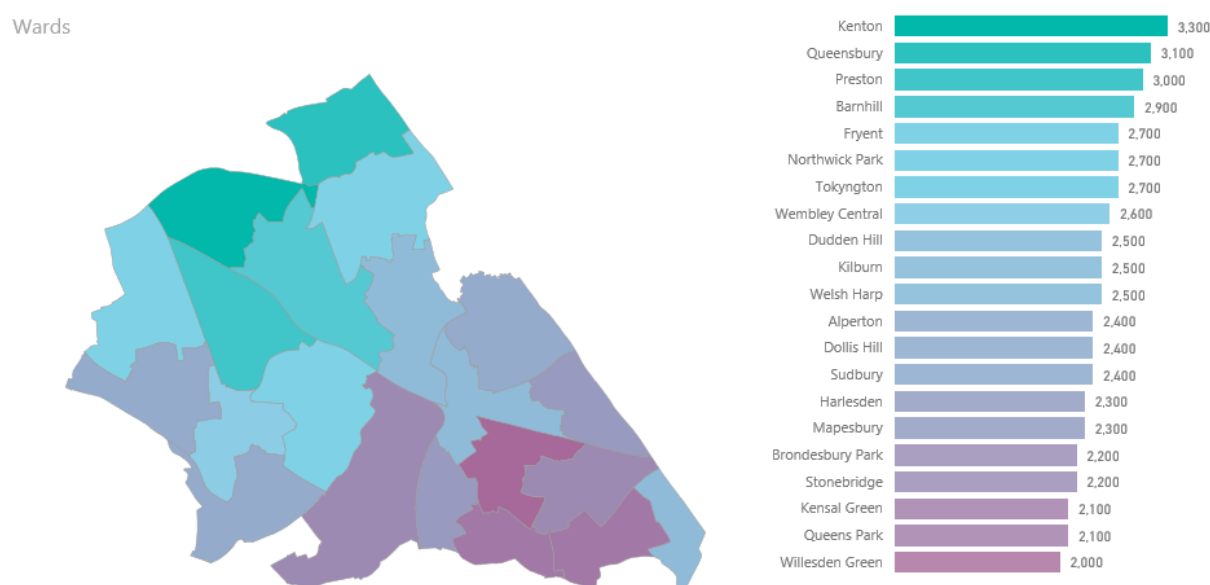


Source: Ordnance Survey.

PTAL and safety is particularly important for the elderly population, who with increasing age are more likely to use the car (mainly as a passenger) as first choice for travel. In London the main barriers to increased public transport use amongst older people are concern about crime and antisocial behaviour; as well as, health problems that limit their ability to travel.⁴⁰⁷ In the UK, the most frequent reason for not using public transport is that it is not convenient and does not go where those 60 and over want to go.⁴⁰⁸

Around 16% of Brent's population are over 60 and therefore have access to free travel on public transport, either through the Freedom Pass (available from the state retirement age) or the London-only 60+ Oyster Photocard (available from age 60)⁴⁰⁹. The older population in the borough is mainly concentrated in the north of the borough, 28% of older people live in Kenton, Queensbury, Preston, Barnhill and Fryent (Figure 205). 2 of the 3 step-free stations in Brent are located in the north of the borough; and PTAL levels are lower compared with southern wards (figure 280).

Figure 205: Brent's population over 60



Source: Ordinance Survey with GLA estimates for 2017, rounded to nearest 100.

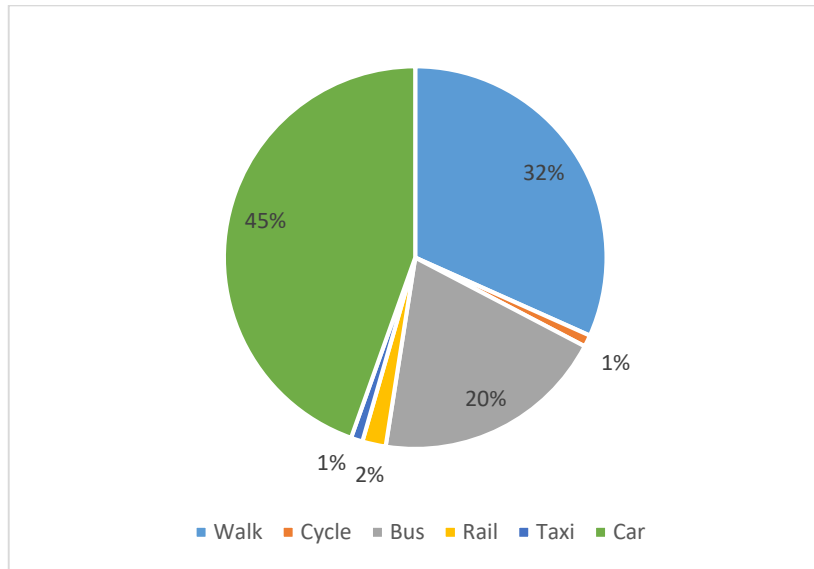
Lack of transport accessibility in Outer Brent therefore contributes in part to high car usage in the borough. Use of buses and underground in Brent are equal highest amongst Outer London boroughs, however a majority (40% of trips) originating in Brent are still by way of car, with 18% by bus, 8% by underground, and 2% by rail. For active transport, walking represents 29% of trips in Brent, but cycling represents only 1% (Figure 206).

⁴⁰⁷ TfL (2012) Understanding the travel needs of London's diverse communities.

⁴⁰⁸ ILC (2017) The Future of Transport in an Ageing Society.

⁴⁰⁹ Population GLA estimates for 2017, rounded to nearest 100.

Figure 206: Modal Split 2017

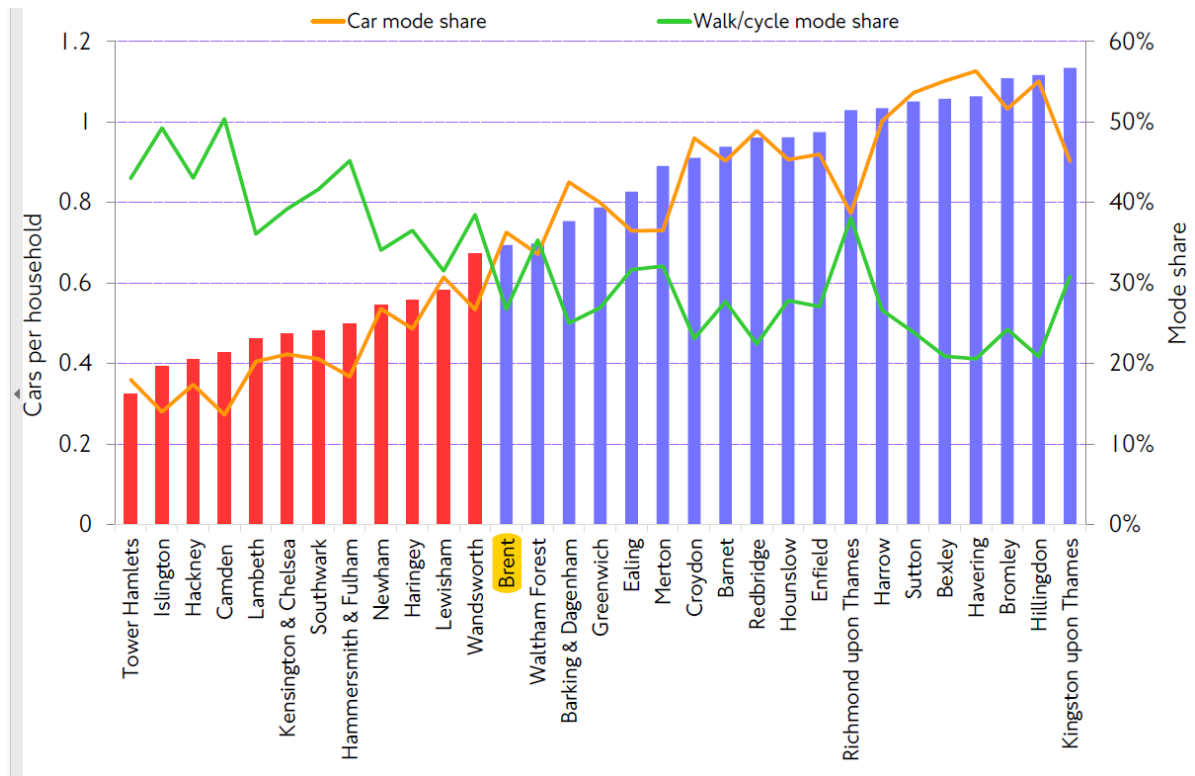


Source: Brent Local Implementation plan 2018

Cars

From 2013 to 2016, Brent had the lowest car ownership rate in Outer London with an average of 0.7 cars per household. However, Brent had a lower walk and cycle mode share (29%) compared with other boroughs with a similar car ownership rate⁴¹⁰ (Figure 207).

Figure 207: Car ownership rates by borough of residence. Average number of cars per household, car mode share and active travel mode share compared.

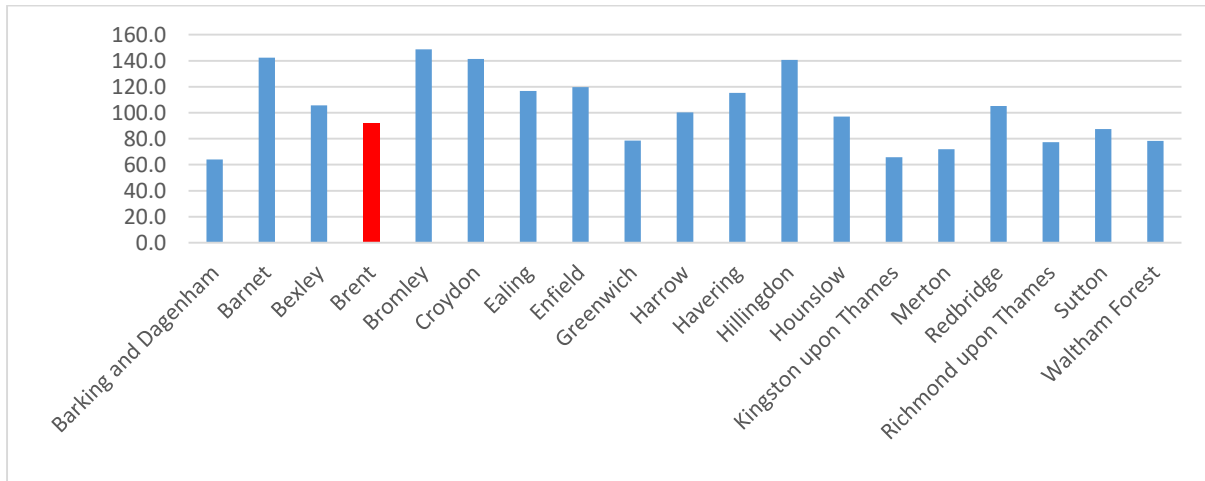


Source: TfL (2017) Travel in London Report 9.

⁴¹⁰ TfL (2017) Travel in London Report 9.

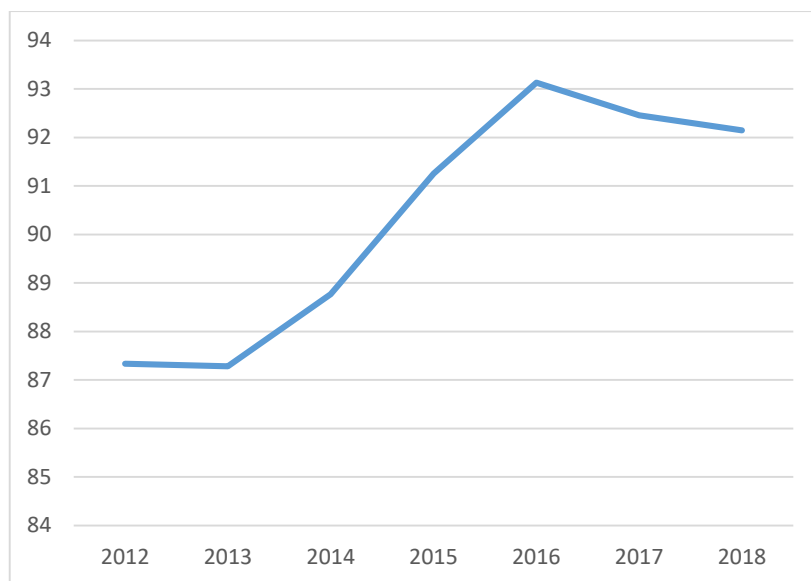
Although, in Brent there are less cars per household than in other Outer London boroughs, latest data shows that Barking and Dagenham is the borough with lowest cars registered (Figure 208). From 2009 to 2016 the number of cars registered in Brent increased by 4.5%, however has subsequently between 2016 to 2018 decreased by 1.1%. (Figure 209).

Figure 208: Cars registered 2018 Outer London (000s)



Source: Department for Transport Statistics Vehicle Licensing Statistics 2019.

Figure 209: Number of Licensed Cars Registered in Brent (000s)

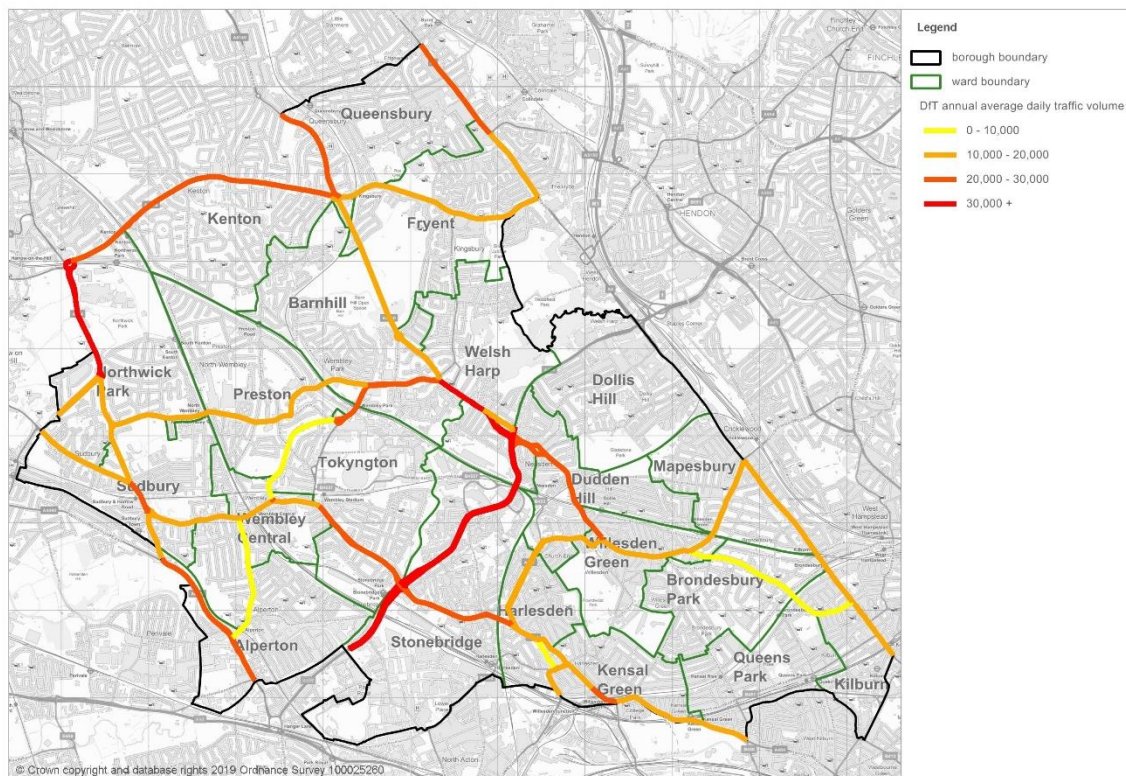


Source: Department for Transport Statistics Vehicle Licensing Statistics 2019.

Traffic Congestion

High rates of car use cause traffic congestion in Brent, which is especially concentrated in central wards, and along the North Circular Road. The map below shows daily traffic flow where red indicates the most congested roads (Figure 210). High levels of congestion reduce the quality of life of Brent residents and have a negative effect on economic growth. They also suppress the uptake of active travel modes by degrading the environment for cyclists and pedestrians.

Figure 210: Annual Average Daily Traffic Volume All motor vehicles



(Units=vehicles per day)
Source: GIS Map

Parking

Demand for parking in the London Borough of Brent is high. Over time the Council has introduced a number of measures to control the demand for kerb space. Parking in the south-eastern part of the borough, which is closest to central London, is regulated through Controlled Parking Zones (CPZs) where residents have the option of purchasing resident permits. Other parts of the borough also have parking controls, typically in and around busy high street locations, or near railway stations where there may be a demand for parking from commuters.

Another key feature is the presence of Wembley Stadium. On major event days the local area receives an extremely high number of visitors, placing significant pressure on local parking. For this reason, the area surrounding the Stadium also has parking controls to protect parking for local residents and businesses.⁴¹¹

In 2018 the Council operated 11 public car parks providing 714 off-street parking stock (including motorcycle spaces), allocated as follows⁴¹²:

- 650 standard car parking spaces:
- 18 disabled spaces
- 26 business spaces
- 10 P2W spaces
- 4 parent & child spaces
- 53 electric vehicle spaces

⁴¹¹ Brent (2015) Parking Strategy 2015.

⁴¹² Brent (2018) *Parking Annual Report 2017-2018*

There are also over 700 spaces in privately-run car parks available to the public on a “turn up and pay” basis. There are large numbers of parking spaces associated with shopping centres, supermarkets etc., although these are often intended for customers only.

There are 33,000 on-street parking spaces managed through 40 Controlled Parking Zones (CPZs) across Brent.

Car Clubs

Car Clubs provide an alternative to private and commercial car ownership and/or use, with cost-effective benefits for the user, and reduce parking pressures to the borough, freeing up residents parking spaces. Car Clubs can reduce overall car dependence by making access to cars more flexible, reducing pressure on road space and encouraging sustainable transport. Car Clubs can help to support low-car, car-lite or car-free developments. Members have access to vehicles on a pay-as-you-drive basis. Cars tend to be located in clusters, allowing access to another car within a short walk if the car in the first location is not available.⁴¹³

Car Clubs are now well-established in Brent, with 87 fixed Car Club bay spaces through two companies Zip Car and City Car Club. The fleet of these Car Clubs includes both diesel and electric vehicles, although the number of vehicles with green technology are lower.

In 2018 Brent Council resolved to implement a flexible car club. Currently Brent Council promotes car club use through the planning system requiring S106 monies to fund car club spaces near new developments as a means of increasing densities through reducing parking requirements.⁴¹⁴ Car clubs can be beneficial in the borough for their ability to improve its public realm, reduce congestion, increase the number of electric vehicles and supporting regeneration.

Electric Cars

Electric vehicles (EVs), Plug-in hybrid electric vehicles (PHEVs) and hydrogen fuel cell electric vehicles (FCEVs) are road transport solutions to reduce the environmental impact on air quality caused by conventional vehicles. EVs produce zero direct NO₂ and CO₂ emissions. PHEVs produce evaporative emissions from the fuel system and tailpipe emissions only when operating on gasoline. FCEVs produce CO₂ only when converting natural gas into hydrogen, and could otherwise use electricity from renewable sources.

National, regional and local government all encourage the use of EVs due to the environment benefits that they bring in urban areas. However, in London to date, take-up of EVs by the general public has remained low, and there have been problems with the maintenance and reliability of some of the charging points installed across the City.⁴¹⁵

Brent Council, in line with Mayor’s environment policy, recognises the importance and promotes the use of EVs in the borough, as one of the measures to tackle poor air quality across the city. There are 26 electric charging points in Brent with an expectation to install 100 more in 2019.

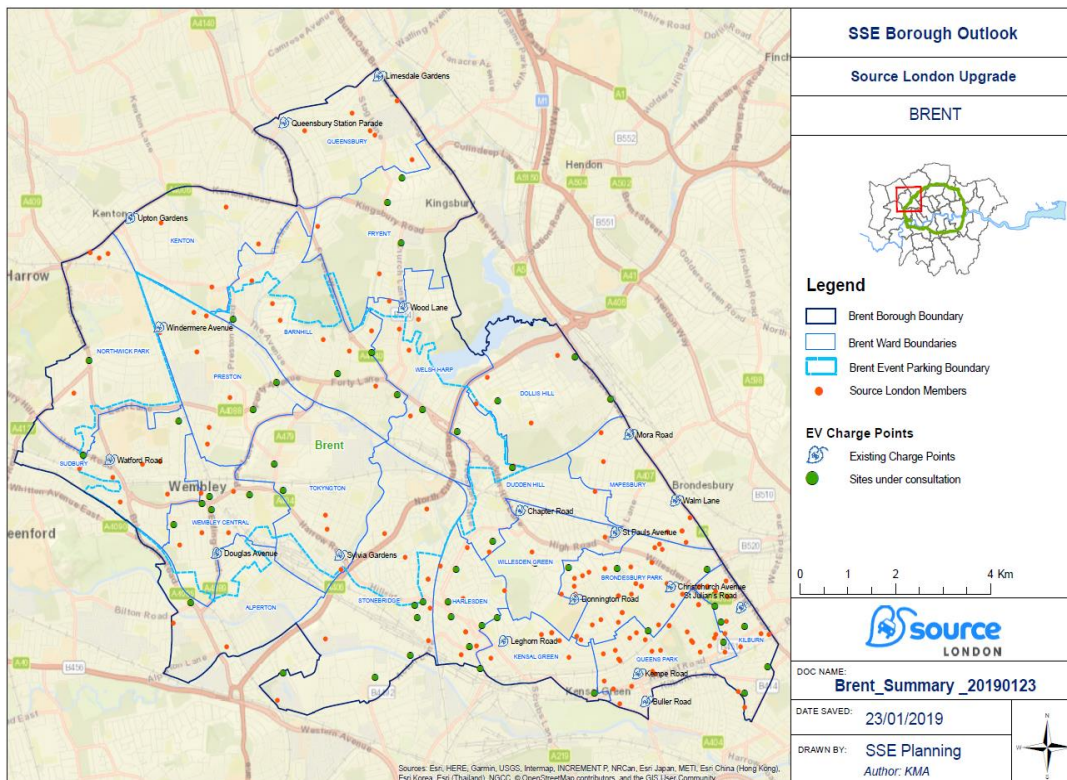
There are currently 40 CPZ’s in the borough providing around 33,000 on-street parking places to some 56,000 households. CPZs cover around 35% of the borough with the Wembley Stadium Protective Parking Scheme (WSPPS) covering a further 35%. Approximately 30% of the borough does not have area wide parking controls.

⁴¹³ TfL (2015) A Car Club Strategy for London: Growing car clubs to support London’s transport future.

⁴¹⁴ Brent (2018) Cabinet Paper Flexible Car Clubs

⁴¹⁵ Brent (2015) Parking Strategy 2015.

Figure 211: Brent's charging points



Source: Zap-Map (2019)

Cycling

Cycling as a mode of transport reduces pollution, congestion and emissions, improving air quality and delivering additional health benefits from increased physical activity. The Mayor's strategies and Brent Council therefore seek to encourage everyone who lives and works to cycle through provision of cycle training schemes, and cycle infrastructure including cycle pathways and cycle parking.

In developing the Brent Cycling Strategy 2016-2021 extensive engagement with residents indicated that the most significant barrier to cycling is considered to be road safety, followed by the cycling environment, and the need to develop a network of quiet, on-road, routes avoiding major links, to encourage cycling and reduce concerns over road safety.⁴¹⁶

As part of the Cycling Strategy and the Air Quality Action Plan Brent Council has implemented different mechanisms to reduce barriers to cycling including the lightly segregated cycle route in Carton Vale; a Quietway from Gladstone Park to Regents Park; free cycle training sessions planned in 50 schools and 20 nurseries; as well as, cycling and walking strategies to assist residents to actively choose to make journeys by cycle⁴¹⁷.

Cycle training in London has proved particularly successful in encouraging people to cycle more, with a positive impact on confidence and safety.⁴¹⁸ In 2013, the Mayor's Vision for Cycling in London was launched, including financial support to encourage more people to cycle through the Borough Cycling Programme (BCP). In 2016 TfL approved £128,700 for

⁴¹⁶ Brent (2016) Cycle Strategy 2016-2021.

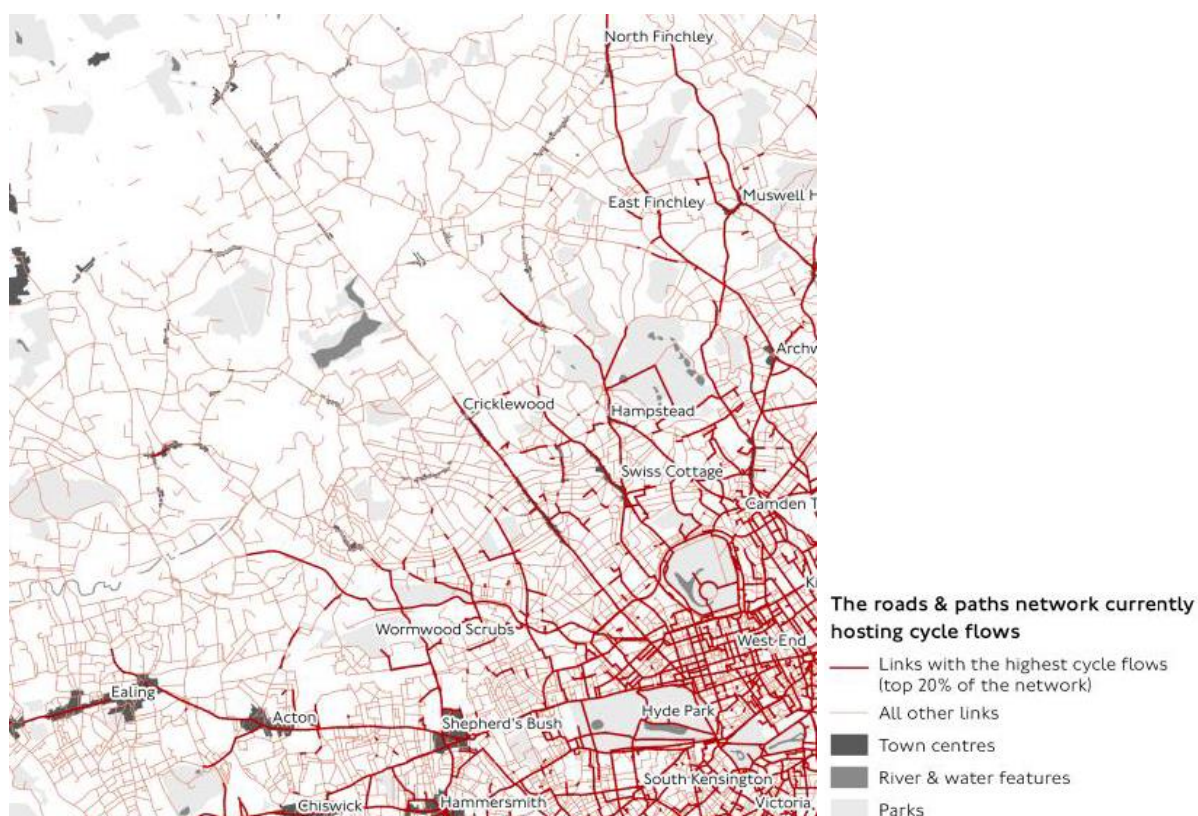
⁴¹⁷ Brent (2017) Air Quality Action Plan 2017-2022.

⁴¹⁸ TfL (2015) Adult Cycle Training Monitoring.

BCP in Brent to finance training, parking and staffing to support the initiative.⁴¹⁹ That year, Brent's cycle training programme reached 285 adults and 956 children.⁴²⁰

In Brent, 2% of all trips were made by bicycle, and around 32% of households own at least one bicycle. Uptake of cycling in the north of the borough lags behind that in the south. In the south of the borough, cycling constitutes 2-5% modal share of journeys, whereas in the north only 0-1%.⁴²¹ The map below shows that most cycle flows in Brent are along the A5 and in the south of the Borough (Figure 212). Difference on rate trips could be due in part to population demographics within Brent – 77% of adults between 20 and 49 with a higher preference to cycle live in central and southern wards, while the older population live mainly in the north of the borough. East London benefits from higher cycle flows, and also has greater cycle infrastructure investments, with 6 existing cycle superhighways, Quietways and mini routes.⁴²²

Figure 212: Roads and paths hosting the highest current cycle flows.



Source: TfL (2017) Strategic Cycling Analysis: Identifying future cycling demand in London.

Walking

Most journeys start and end with walking. Encouraging walking is key to encouraging more sustainable and active modes of travel, whether for part or all of a journey. Pavements and footpaths are essential for all (including wheelchair users) to allow access to local places and to create the street environments where daily life is played out. With Brent's growing population, an increase in walking is essential to ensure other transport networks continue to function efficiently, as well as delivering public health improvements for Brent residents.⁴²³

⁴¹⁹ TfL (2017) Borough Cycling Programme Funding for 2016/2017.

⁴²⁰ Brent (2017) Cabinet report 24 April 2017. Report for the Strategic Director Regeneration & Environment.

⁴²¹ Brent (2015) Long Term Transport Strategy 2015-2035

⁴²² TfL (2017) Strategic Cycling Analysis: Identifying future cycling demand in London.

⁴²³ Brent (2017) Walking Strategy 2017-2022

Biodiversity & Green/Blue Infrastructure Management

The environment is fundamental to the health and quality of life of Londoners, but also has an important role in the function of the London economy. In London public parks are estimated to have a gross asset value of over £91 billion due to their value for recreation, health and environment, benefiting individuals, public services and business. 61% of this economic value is attributed to increased residential property prices, 19% physical and mental health benefits, 19% recreational value, and 1% temperature regulation and carbon storage. For public services, the economic contribution of green areas are most particularly from the health benefits received.⁴²⁴ Other green areas similarly have relevant environmental value that can too often be overlooked, with a range of benefits including: mitigating flooding, improving air and water quality, cooling the urban environment, absorbing carbon dioxide, providing shade from UV radiation to reduce skin cancer risks, supporting biodiversity, encouraging walking and cycling, and enhancing biodiversity and ecological resilience.

Open Spaces within Brent include green spaces such as parks, tree-lined streets, allotments, natural habitats, recreation grounds, playing fields, burial grounds, woodlands, farmland, amenity space and children's play areas (Figure 213). Fryent Country Park (103 ha) and the Brent Reservoir (102 ha, of which approximately 50 ha are in Brent), are the two largest wildlife sites in the Borough. The Grand Union Canal (12 ha in Brent) also provides a valuable habitat for fish, waterbirds, aquatic plants and invertebrates.⁴²⁵

Brent has 4,300 ha of green spaces and 600 ha of parks areas, a lower percentage of green area compared to the London average, at 14% in Brent versus 20% in Greater London⁴²⁶. Brent Council is however committed to increase and protect green areas, through the Tree Management Policy that looks manage and maintain tree stock on public highways, housing estates, parks and cemeteries; enhance the role of trees in mitigating climate change; plant new trees and protect threatened trees in conservation areas.⁴²⁷

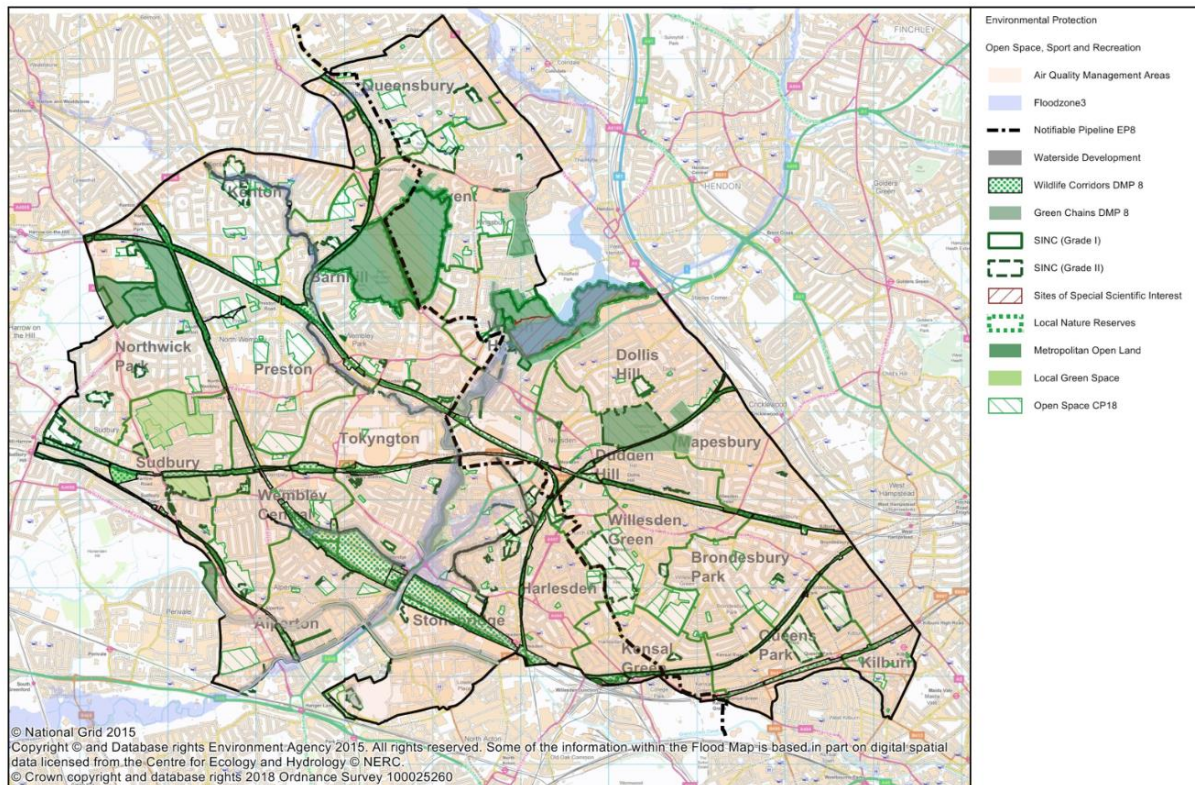
⁴²⁴ GLA (2017) Natural capital accounts for public green space in London.

⁴²⁵ Brent (2007) Open Space and Biodiversity LDF 2007.

⁴²⁶ GLA (2017) Natural capital accounts for public green space in London.

⁴²⁷ Brent (2017) Tree Management Policy.

Figure 213: Open Space



27 March 2018

1:52000

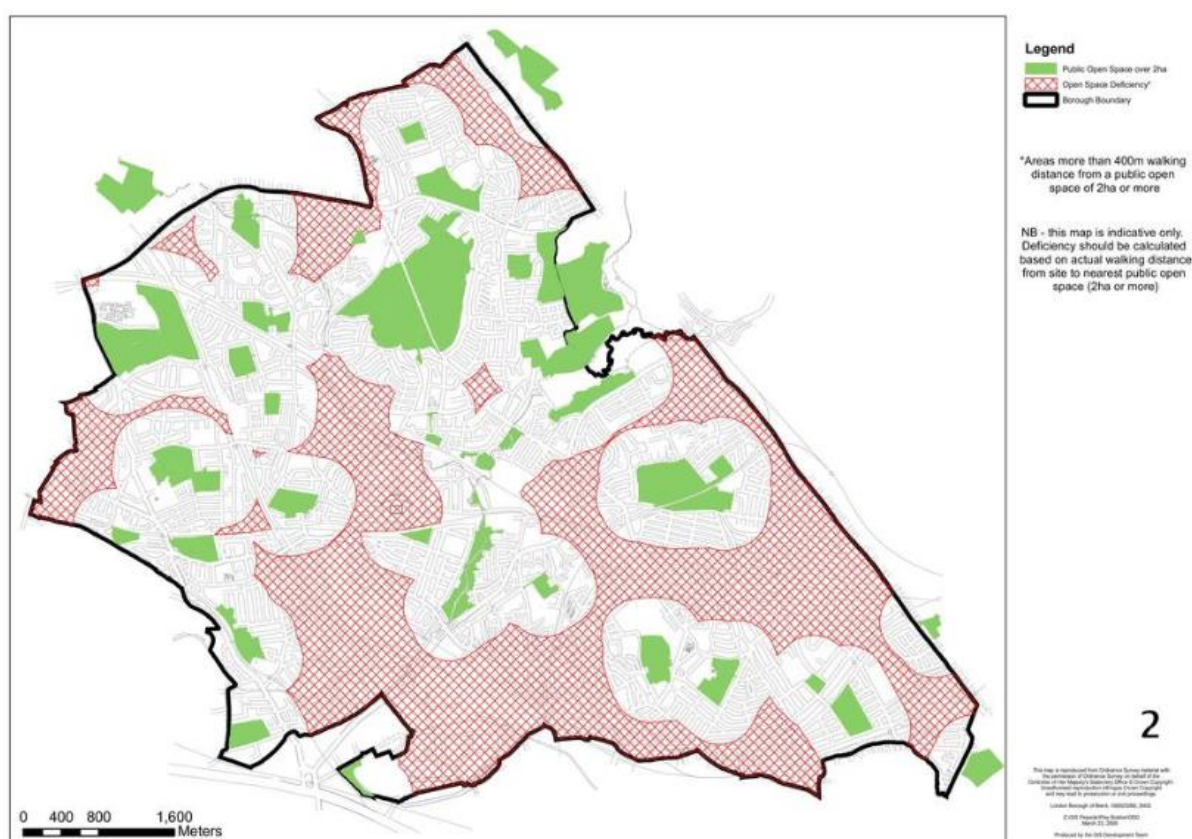
0 500 1000 metres



Source: Ordnance Survey.

Given Brent's smaller proportion of public Green space, the borough is characterised by areas of open space deficiency (Figure 214). More than half of Brent households live further away from the nearest green space of more than 2 hectares than the maximum recommended distance of 400m in the London Plan.

Figure 214: Local Open Space Deficiency Areas



Source: Ordnance Survey.

Brent Council has worked with communities to maintain current green spaces and increase the number of trees, including the £0.12m funding received in 2016 from Mayor’s “Community Green Space” and “Community Tree Planting” grants, including planting 590 trees with 4 different community groups.⁴²⁸

Though Brent is characterised by a lower percentage of public green space, the borough has a higher percentage area of domestic gardens than in Greater London, at 30.34% versus 23.85%.⁴²⁹ Private gardens occupy approximately a fifth of the Borough by land area. There are 1,108 allotment plots in the Borough managed by Brent Council Parks Service and a number of private allotments. These areas provide opportunities for relaxation and exercise; for growing food and providing seasonally changing vegetation; in reducing urban flooding and helping to store carbon dioxide; and provide wildlife and biodiversity on the doorstep.

Biodiversity

A wide range of habitats are associated with trees. In Brent these include broadleaved woodland, lowland mixed deciduous woodland, wet woodland, street trees, veteran trees, orchards, hedges and hedgerows, and scrub. Trees and other vegetation are net absorbers of carbon during their lifetime which has the effect of reducing atmospheric carbon; and of potentially providing a carbon-neutral source of energy to substitute the combustion of fossil fuels. Trees can also reduce winter heat loss around buildings; and provide summer shading for both buildings and people. Brent Council manages trees in streets and parks; and through the planning system has a role in encouraging an appropriate stock of trees in the Borough.

⁴²⁸ GLA (2017) Tree planting grants 2016-17.

⁴²⁹ London Datastore (2014) Land use by Borough and Ward.

Blue Infrastructure Management

Adequate management of the blue infrastructure in the borough will relieve environmental threats that increase risks of flooding and droughts, as well as meet the drainage and water provision demands of a growing population.

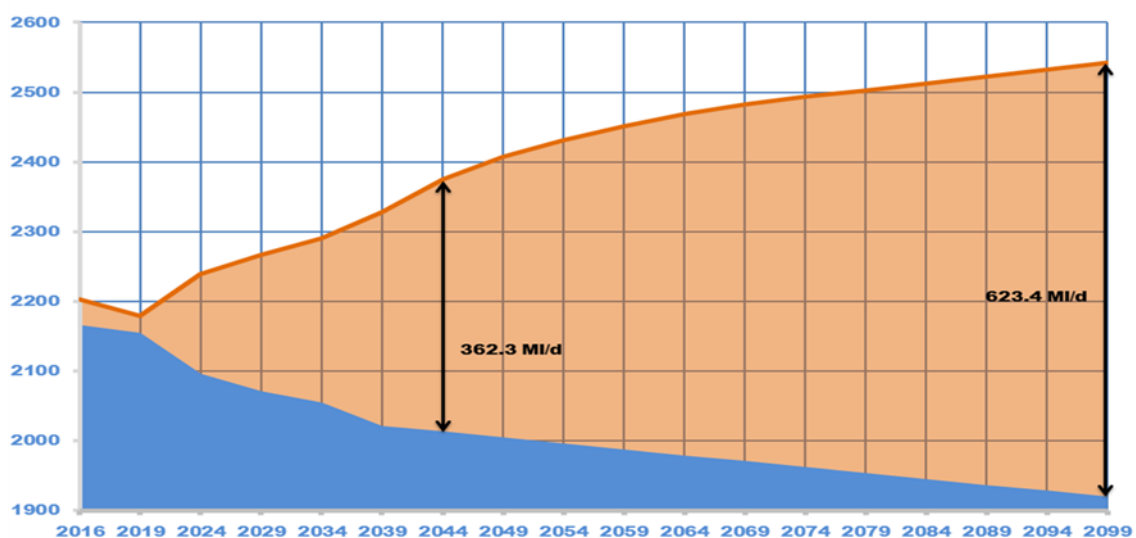
Thames Water Corporation is the main authority in charge of the public water supply and waste water treatment in London and Brent. Blue infrastructure serving Brent includes sewage treatment plants, sewer systems and catchments which are controlled by Thames Water. The existing water supply in Brent is composed of 77% surface water and 23% groundwater. To evaluate if the current blue infrastructure meets population and environment requirements, water consumption patterns, drainage capacity and flood risk areas should be analysed.

Water Consumption

The South East of England is classified by the Environment Agency (EA) as being in “serious” water stress. This means that in an average year more water is abstracted from the environment to meet our demands than is sustainable in the long term. Many water companies in the South East have been set ‘sustainability reduction targets’ by the EA to reduce the amount of water they take from the environment. This serious water stress, together with climate change and population growth, have led Thames Water to estimate that by 2050, without further action, London’s demand for water will exceed the available sustainable supply by 522M litres per day (l/d) by 2050.⁴³⁰

London’s water supply is in deficit, with the deficit growing from 7.6M (l/d) in 2016-17 to 40.1Ml/d in 2017-18. Over 2017-18, London’s annual water consumption per capita was 120.8 l/d for households in measured (metered) areas, and 159.4 l/d for households in (unmetered) unmeasured areas.⁴³¹ Thames Water indicates that London’s overall water supply capacity is below consumptions patterns. Growth in demand from an increasing population, and falling available supply due to climate changes, changes in bulk supply and increased third party abstraction from the River Thames, means the gap is predicted to widen if no action is taken, with insufficient water to meet London’s needs.

Figure 215: Thames Water, Water Deficit Prediction (Ml/d) 2016-2100 under dry year average.



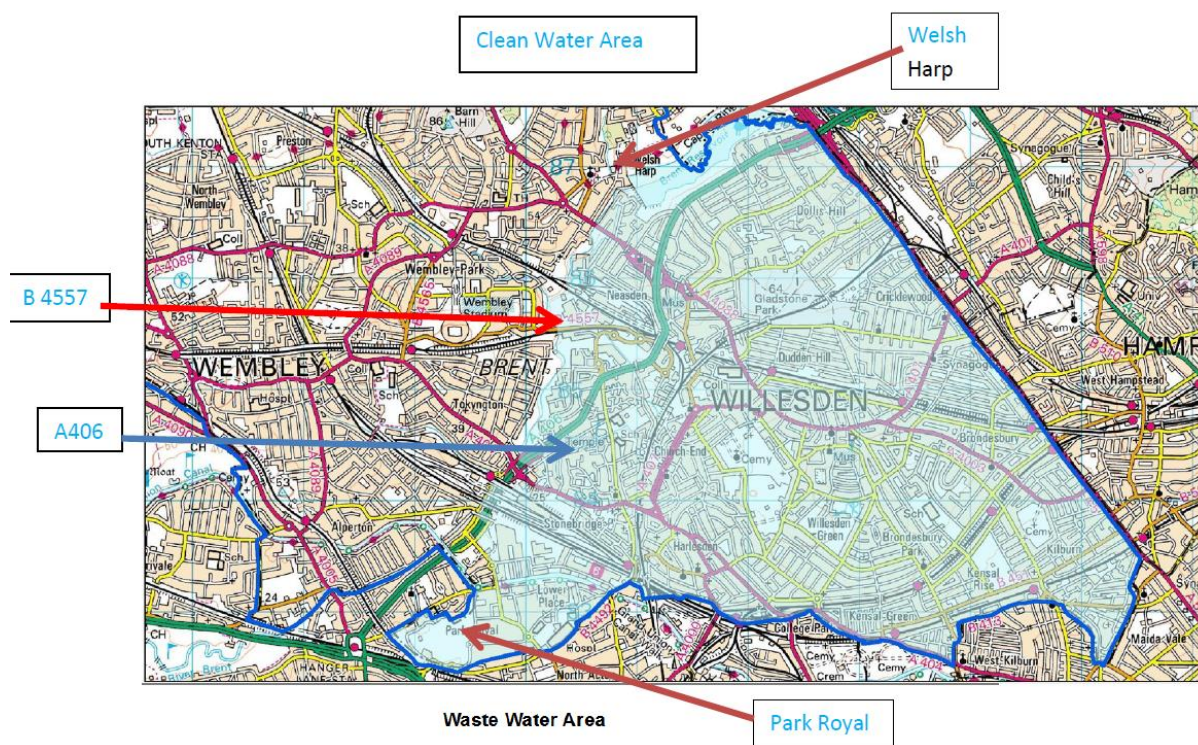
Source: Thames Water Revised Draft Water Resources Management Plan 2019

⁴³⁰ GLA (2016) Economic Evidence Base for London 2016.

⁴³¹ Thames Water (2017 & 2018) Environment Agency Annual Review 2016-17 and 2017-18

At a local level, Thames Waters are able to provide some limited detail on water demand and consumption in the District Meter Area which covers half of Brent south and east of the River Brent and Welsh Harp Reservoir.⁴³²

Figure 216: District Meter Area in LB Brent



Source: Thames Water (2018) Environmental Information Request Response 12/091

Taking latest data for 2016-17 and 2017-18 provided by Thames Water below, household water consumption per capita is noted to be higher than the Thames Water 125 l/d standard⁴³³ or the London Plan 105 l/d standard set for new domestic properties⁴³⁴. Assuming an LB Brent average household size of 2.8 persons as per Census 2011, latest data indicates daily annual water consumption per capita fell from 152 l/d to 139 l/d for households in the LB Brent District Meter Area between 2016-17 and 2017-18. Over the same period 2016-17 and 2017-18 the number of domestic properties metered in the area rose from 28% to 47% and this increase in metering is considered the main driver for the fall in water consumption. Clear variance is observed between daily water consumption per capita at both the London and Brent levels, with water consumption 30% higher at 156 l/d in unmeasured (unmetered), compared to 120 l/d in measured (metered), domestic properties in Brent over 2017-18.⁴³⁵

⁴³² Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

⁴³³ CLG / DEFRA (2007) Water Efficiency in New Buildings

⁴³⁴ Mayor of London (2016) London Plan : Chapter Five : London's Response to Climate Change

⁴³⁵ Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

Figure 217: Household and Commercial Water Consumption 2016-17 & 2017-18

		Property Count ¹	Average Daily consumption m ³	Average per property consumption l/d
Households	Measured	16457	5554.56	337.51
	Unmeasured ²	41451	19165.55	462.36
Commercial	Measured	2708	5426.57	2003.90
	Unmeasured ³	579	183.3	316.58

		Property count	Average Daily Consumption (ADC)	Average consumption per property
Household	Measured	27318	9207.34	337.043
	Unmeasured	30934	13530.88	437.4113
Commercial	Measured	2776	5302.4	1910.086
	Unmeasured	716	188.51	263.2821

Source: Thames Water (2018 & 2019) Environmental Information Request Responses 12/091 and 19/20/014

Flood Risk

Flood risk poses a significant threat to a large proportion of Brent, with 4% of properties lying directly within a floodplain. The percentage of properties in Brent with a significant chance of flooding is 2.7%, and the percentage of properties in Brent with moderate and low chances of flooding are 0.4% and 1.4% respectively.⁴³⁶ The probability of flooding is considered likely to grow as climate change increases the frequency of extreme weather. Brent is very fortunate not to have experienced major flooding incidents in the last two decades, only in 2007 and 2010 did flooding extend to the highway, open spaces and gardens.⁴³⁷

According to the Environment Agency's national Flood Map for Surface Water (FMfSW) dataset, approximately 35,500 residential properties and 4,400 non-residential properties in Brent could be at risk of surface water flooding of greater than 0.1m depth during a rainfall event with a 1 in 200 probability of occurrence in any given year (0.5% Annual Exceedance Probability, AEP). 12,600 residential properties and 4,400 non-residential properties are estimated to be at risk of flooding to a depth of greater than 0.3m during the same modelled rainfall event.⁴³⁸

Waste

In 2015, London produced around 18 million tonnes of waste, 17% from household, 28% commercial and industrial waste, and 54% of construction, demolition and excavation. London has lower rates of recycling compared to England as a whole. Around one-third of households recycle, which is approximately 10% lower than the national average.⁴³⁹

⁴³⁶ Thames Water (2017) Annual Review 2016-17

⁴³⁷ Brent (2015) Flood risk Management Strategy.

⁴³⁸ Environment Agency, Flood Map for Surface Water (FMfSW) (2017).

⁴³⁹ GLA (2016) Economic Evidence Base for London 2016.

Latest published data (2019), indicates that in 2016 London produced 18.7 million tonnes of waste and Brent produced 0.94 million tonnes of waste, categorised as below:

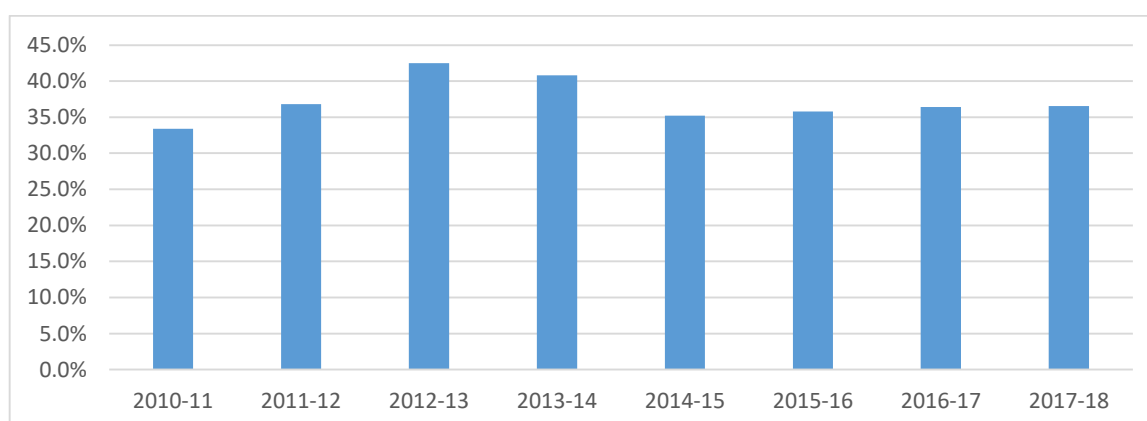
Figure 218: London and Brent Waste 2016 (millions of tonnes)

London		
Household/Industrial/Commercial	7.9	42%
Construction & Demolition	10.4	56%
Hazardous	0.4	2%
	18.7	
Brent		
Household/Industrial/Commercial	0.4772	50.6%
Construction & Demolition	0.4658	49.4%
Hazardous	0.0008	0.1%
	0.9438	

Source: Environment Agency (2019) Waste Data Interrogator 2016

Household recycling in Brent has generally improved since 1998, and in 2017/18, 36.5% of household waste in Brent was sent for recycling/compost (Figure 218).

Figure 219: Percentage of household waste sent for reuse, recycling or composting



Source: DEFRA (2018) Local Authority Collected Waste Statistics - Local Authority data

In 2015, Brent adopted the West London Waste Plan, partnering with the London Boroughs of Ealing, Harrow, Hillingdon, Hounslow, Richmond upon Thames and the Old Oak and Park Royal Development Corporation (OPDC) to manage waste.⁴⁴⁰ The West London boroughs agreed to co-operate to produce a single waste plan for their combined area that now forms part of each of their Local Plans and the OPDC development plan. A significant amount of waste is transferred outside of London for treatment or disposal (Figure 219 & 220).

⁴⁴⁰ WLWP (2015) West London Waste Plan 2015.

Figure 220: Quantity of waste produced in West London (tonnes per annum)

	2011	2016
MSW arisings	796,000	826,000
C&I waste arisings	1,287,000	1,258,000
Total (MSW and C&I waste) arisings	2,085,000	2,084,000

Figure 221: West London Waste Capacity Requirements (tonnes per annum)

	2011	2016
Apportionment	1,399,000	1,595,000
Total existing waste management capacity	1,636,000	1,636,000

Source: WLWP (2015) West London Waste Plan 2015.

Circular Economy

A circular economy differs from traditional ‘take-make-use-dispose’ approaches and offers a solution to the problem of waste management, particularly for waste generated by construction and demolition, which accounts for more than half of waste production in London. Movement towards a circular economy in London with greater reuse, recycling and re-manufacture can help address negative externalities associated with increased waste and provide opportunity for new economic activity in the capital.⁴⁴¹

This model is particularly important as a growing population will increase household waste, and in regeneration areas, where projects generate a demand for new materials and demolition of existing buildings creates large volumes of waste. Brent manages around 3.4% of waste managed in London, 195,000 tonnes per annum.⁴⁴²

Enviro-Crime & Environmental Protection

Environmental crime is generally used to describe any illegal activity that harms the environment and that has serious human health and social impacts. Some definitions link it to other types of serious crime related with Anti-Social Behaviour (ASB).

In Brent, graffiti, fly-posting, fly-tipping, litter, dog fouling and waste burning are all activities related with enviro-crime. Tackling Environmental ASB in the borough is important due to its negative impact on the environment and because the quality of the local environment contributes to people’s satisfaction with the conditions within which they live.

Brent Council works in partnership with the Metropolitan Police, Safer Neighbourhood Teams, charities and the community to deal with ASB. Current measures implemented include: the street cleaning programme, online platform to report street problems through the Council website, Cleaner Brent App, and financial penalties.

Improper disposal of waste can contaminate land, water and air, and is often linked to organised crime, the convenience of fly-tipping in areas with poor tip access, and lack of public awareness about negative environmental impacts⁴⁴³ In Brent, the number of reported fly tipping incidents has increased each year, with a rise of 169% from 2012 to 2017 (figure 298).⁴⁴⁴

Brent Council explains that this growth is partly due to the introduction of the Cleaner Brent App in 2015, which encourages members of public to report incidents. Incidents can range from a few black bags placed around a tree, to a large deposit of DIY or building material, and

⁴⁴¹ GLA (2016) Economic Evidence Base for London 2016

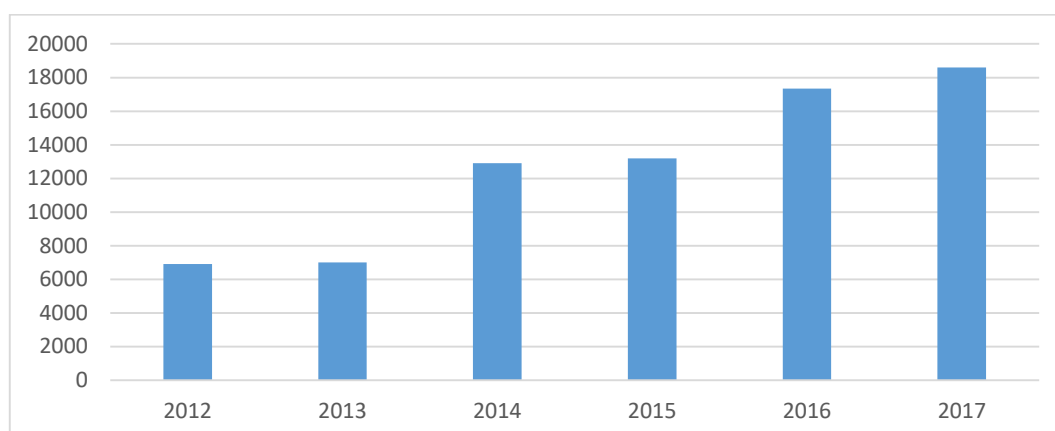
⁴⁴² GLA (2016) Further Alterations London Plan. Table 5.3.

⁴⁴³ POST (2017) Environmental crime.

⁴⁴⁴ DEFRA (2017) ENV14. Fly tipping incidents and actions taken, reported by Local Authorities in England 2012 to 2017.

offences can carry a £75,000 (individual) and £95,000 (business) maximum fine or 5 years imprisonment. Any vehicles used in such offences can be seized by the Council.⁴⁴⁵

Figure 222: Fly Tipping incidents reported in Brent



Source: DEFRA Waste and recycling statistics (2018) Fly tipping incidents and actions taken, reported by Local Authorities in England 2012 to 2018.

Environmental ASB leads communities to view and consider their neighbourhoods negatively and can be argued to result in social disorganisation.

Brent tackles wider Anti-Social Behaviour (ASB) activity through a specific strategy included in the Safer Brent Partnership 2014-2017, that seeks to protect vulnerable locations, manage prolific offenders of ASB and safeguard vulnerable victims. The aim is to create a new model of community safety, reducing demand, identifying and addressing behaviours that make people feel uncomfortable or unsafe in our shared public spaces.⁴⁴⁶

Total Anti-Social Behaviour Cases opened 16/17 = 275
Total case actions 16/17 = 1943

Overlaying the Council, Police and Ambulance data and licensing reviews, 12 areas have been identified as drinking hotspots. The areas identified are; Neasden, Sudbury, Ealing Road, Kingsbury, Harlesden, Willesden, Wembley, Wembley Park, Cricklewood, Kensal Rise, Kilburn and Queens Park.

Since the ASB Crime and Policing Act was implemented in 2014 to date, the Council has registered 409 enforcement actions, 315 in the last year which includes:⁴⁴⁷

- 5 Criminal Behaviour Order (CBO) issued by the criminal court against people convicted for ASB offences.
- 8 Crack House Closure Orders related with drug use, production or supply.
- 40 Community Protection Notice (CPN) warnings issued by the Council to stop offenders from committing ASB related with kerb crawling, pitching tents on public land, drug related and nuisance behaviour.
- 14 CPN for ASB related with drugs, kerb crawling and operate coach without authorisation.
- 84 Fixed Penalty Notice (FPN) for breach of CPN.
- 141 Public Space Protection Order (PSPO) warnings related with street drinking 70% of them occurred in Ealing Road and Neasden.
- 23 PSPO FPN for street drinking, 78% of them occurred in Neasden.

⁴⁴⁵ Brent (2017) Illegal rubbish dumping.

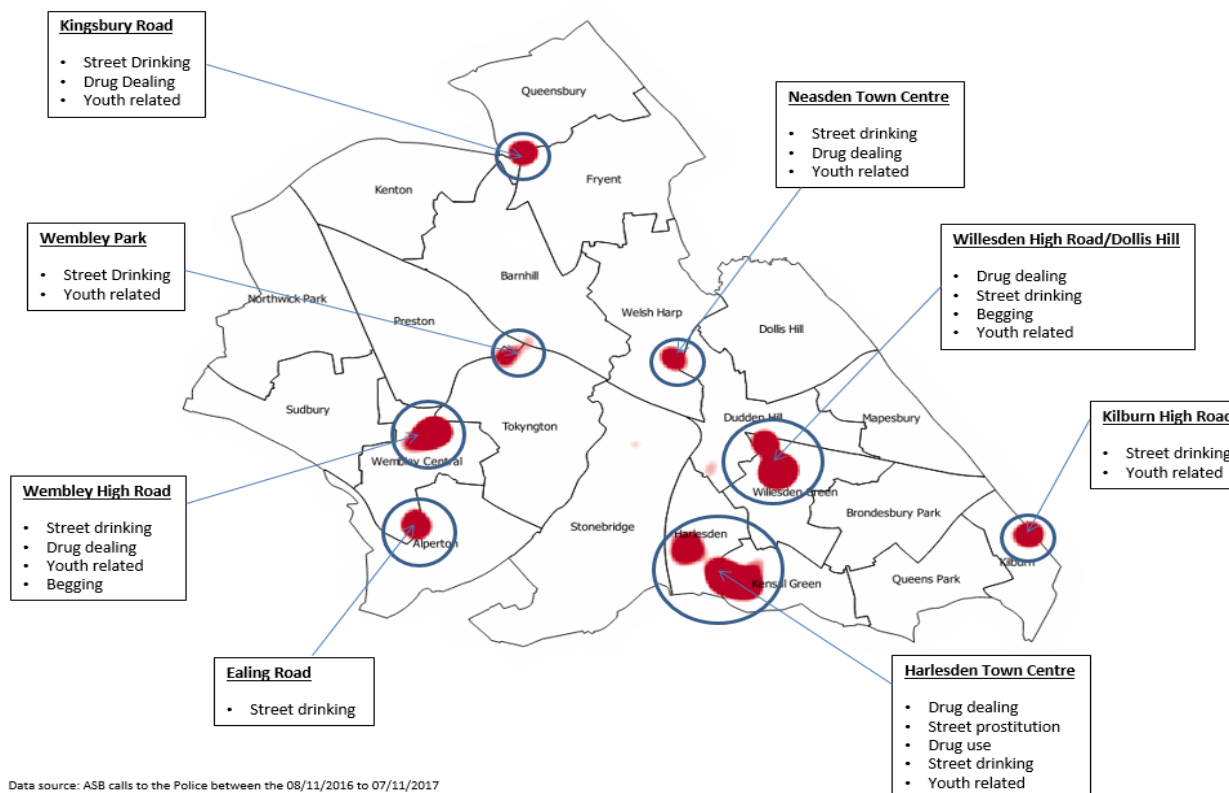
⁴⁴⁶ Brent (2017) Safer Brent Partnership. Annual Report 2016-2017.

⁴⁴⁷ ASB LB Brent, information updated to November 2017.

- 5 PSPO FPN for casual labour market activities in Honeyplot Lane, Queensbury Ward.

In Brent, ASB is more commonly observed in town centre and high street locations. ASB activities are mapped by the Community Safety Analyst who prioritises enforcement and engagement in the 21 wards in Brent, coordinating efforts of the three Local Joint Action Groups (LJAG), the local police and Safer Neighbourhoods Team (SNT) (Figure 223).

Figure 223: ASB Hotspot Areas 2016-2017



Data source: ASB LB Brent, information updated to November 2017.

Brent's strategy to prevent and tackle ASB includes the following additional measures:

- More targeted use of Criminal Behaviour Orders to deal with high level ASB offenders.
- Public Spaces Protection Orders (PSPOs) to tackle street drinking over the borough and nuisance. PSPOs are particularly implemented to deal with labour market problems in areas with higher rates such as Cricklewood, Kingsbury and Queensbury.
- Partnerships with Charities such as St Mungo's, Change Grow and Live to deal with issues related with prostitution, drug and alcohol addiction.
- London police partnership to identify brothels, gangs, Child Sexual Exploitation (CSE) and violence against women and girls in Brent.
- Current use of Community Protection Warnings and Notices used to tackle low level ASB.
- Management groups to ensure better coordination of approach, with multi-agencies and internal departments, across ASB, Waste Enforcement, Private Housing, Noise Nuisance and Regulatory services.

Key Trends

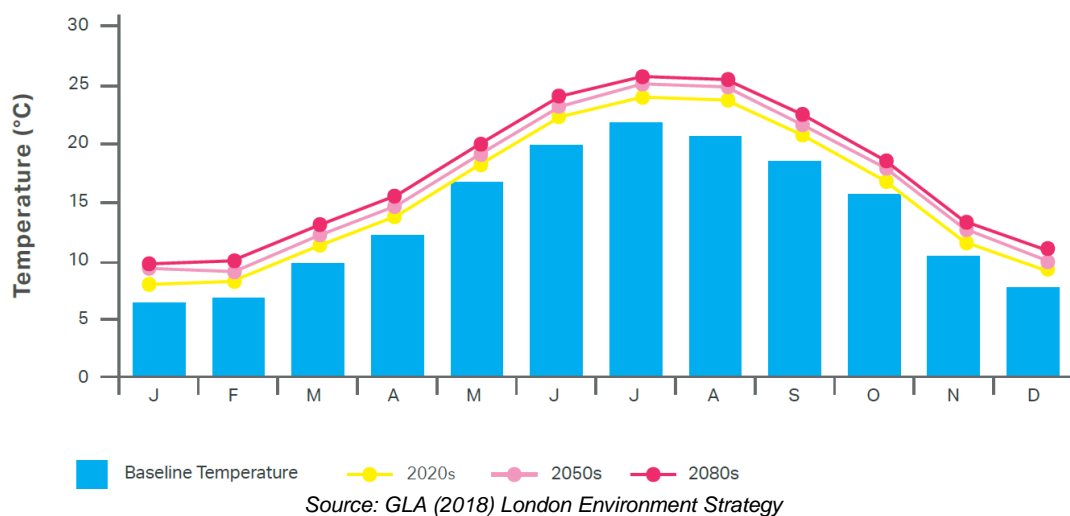
In the context of the growth projections, changes in demographics and income levels, regeneration of the borough, diversity of Brent and changing lifestyles, anticipated trends must be considered for the Inclusive Growth Strategy (IGS) to understand how the environment will be impacted in the future and how the borough may reduce such impacts.

Trend 1: Climate Change, Rising Temperatures & Environmental Impacts

The effects of climate change may leave Brent at risk of extreme weather, increased flooding, and associated health and safety risks for residents. London is already vulnerable to extreme weather, in the form of floods, droughts, heatwaves and very cold weather. Without action, further climate change, London's population growth, changes to the make-up of London's population and land cover, and other factors, will increase the risk of severe impacts.

London and UK has already experienced a temperature increase of approximately 1°C since the late 19th century, and it is likely that global emissions of GHG have contributed to this rise. By 2050 it is projected average monthly temperatures will increase 5-6°C in summer and winter, compared with current levels (Figure 224).⁴⁴⁸ Extreme weather, such as heatwaves and very heavy rainfall is expected to become more frequent and intense. Very cold winters will still occur, though they will become less frequent. Sea levels are due to rise for centuries.⁴⁴⁹

Figure 224: Average monthly temperatures (°C) in London over the century



Urban areas with a concentration of higher and denser buildings could have warmer temperatures due to the increasing amount of heat absorbed. GLA forecast that in urban areas with high-rise buildings and limited access to green space, the urban heat island (UHI) effect can be up 10°C warmer than in other areas in London. Therefore, high temperatures have a bigger impact in built up areas in Brent. High temperatures also affect people at work, particularly those who work outdoors (e.g. construction or parks staff), within confined spaces (e.g. in workshops or garages) or in vehicles (e.g. taxi, delivery, bus, train or tube drivers).

Heavy thunderstorms and intense winter downpours are forecast to become more common. Because most of Brent is built-up, almost all rainfall ends up in drains, which were not designed to cope with sudden, very heavy rainfall. The resulting flash foods could block roads, cause

⁴⁴⁸ GLA (2018) London Environment Strategy.

⁴⁴⁹ GLA (2011) London Climate Change Adaption Strategy.

damage and lead to prolonged disruption to the local economy. Sea levels will also gradually rise, increasing the risk of major flooding in London.

Brent Council is committed to improve the environmental quality of the borough and wellbeing of its citizens in line with national and local policies such as the Climate Change Strategy, the Carbon Management Strategy and the Energy Statement & Strategy.⁴⁵⁰ These strategies look at how the borough can cope and respond to the challenges and opportunities that climate change brings. There are two main responses to the challenges that arise from climate change: to slow it down by cutting emissions of greenhouse gases (mitigation) and to cope with the changing climate by adapting to changes in the weather (adaptation).

London and Brent's greenhouse gas emissions are dominated by buildings and transport. As the population continues to grow, so too will the levels of decarbonisation required to improve air quality and tackle public health inequalities. Addressing climate change requires specific actions to be implemented, such as adoption of tighter PM_{2.5} limits, reduction of the number of vehicle kilometres, a modal shift to walking, cycling and public transport, reduction of black carbon emissions by switching to zero emission vehicles, replacement of inefficient boilers, increase in the energy efficiency of buildings, and increased use of renewable energy.⁴⁵¹

Reducing Carbon Emissions

Reducing GHG emissions to tackle climate change is a national and local priority. Carbon dioxide (CO₂), is the most common GHG emitted by human activity and is now the main contributor to global warming and climate change. The UK is the world's 8th largest emitter of this pollutant, Brent is responsible for 0.3% of national CO₂ emissions and 3% of London CO₂ emissions. The Council is committed to reduce its emissions and contribute to achieving national and local targets.

The UK's long-term target is to reduce at least 80% of GHG emissions by 2050 to maintain global average temperature at around 2°C above pre-industrial levels⁴⁵². The Mayor's carbon emissions target is 60% by 2025, with the aim to achieve zero carbon city by 2050. Policy intervention and action to meet current national and local targets is essential. The Mayor forecasts that implementing existing policies, the UK and London could achieve a 25% GHG reduction on 1990 levels by 2050. An extra 45% GHG reduction is shown to be achievable through decarbonisation of energy grids and other actions at a UK level in line with policies and proposals needed to achieve UK carbon budgets. The final extra 30% GHG reduction would be met through new policy and additional action at city level (Figure 225).⁴⁵³

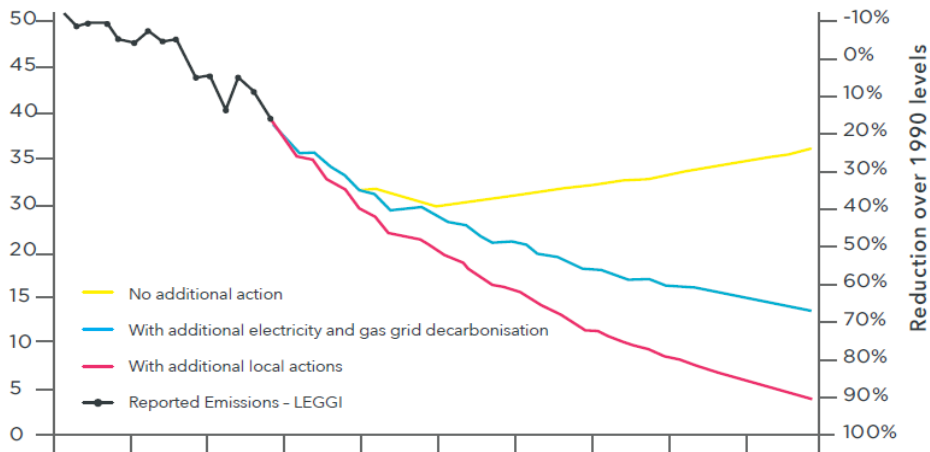
⁴⁵⁰ Brent (2017) Report from the Strategic Director of Regeneration and Environment. 11 December 2017.

⁴⁵¹ GLA (2017) London Environment Strategy. Draft for public consultation.

⁴⁵² Committee on climate Change (2016) UK climate action following the Paris Agreement.

⁴⁵³ GLA (2017) London Environment Strategy. Draft for public consultation. Appendix 2. Evidence base.

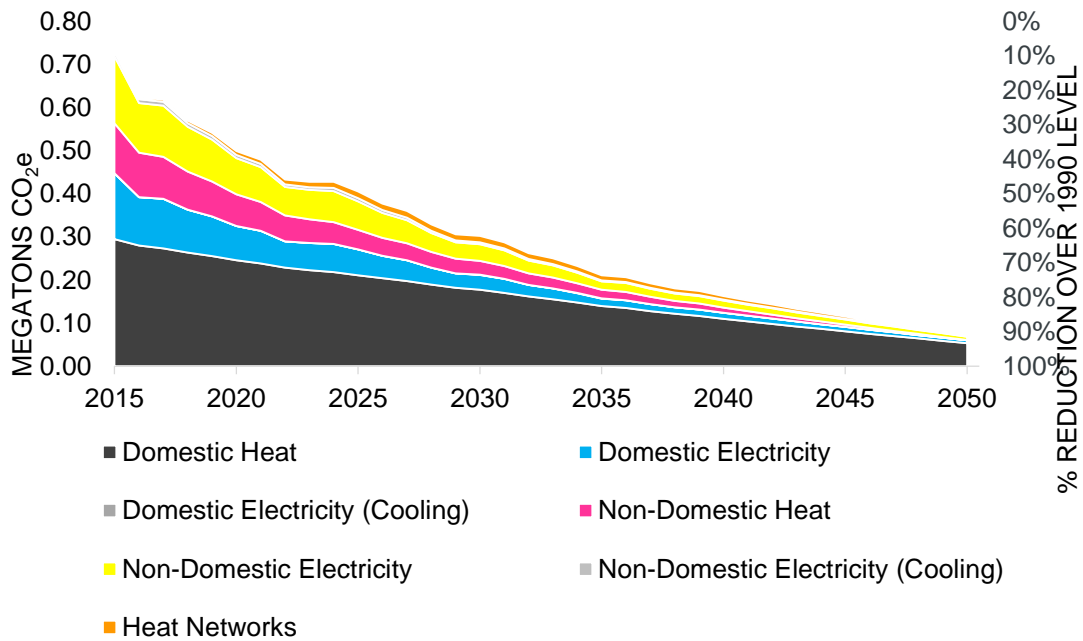
Figure 225: London's GHG emission trajectory to zero carbon



Source: GLA (2017), Modelling including BEIS and Committee on Climate Change datasets

Therefore, based on projected future energy demand, technological change and changes in energy supply mix, the GLA have developed an expected pathway to achieve zero carbon emissions in Brent by 2050 as is shown in figure 226.

Figure 226: Brent Carbon Emissions - Projections



Source: London Datastore (2017) London's Zero Carbon Pathways Tool.

Decarbonisation of homes and workplaces, and the development of clean and smart energy systems using local and renewable energy resources, should be prioritised to reduce carbon emissions. The planned revision of the AQMA in 2020 for Brent will also support requirements to achieve the carbon emissions projections. Brent currently has an Air Quality Action Plan 2017-2022 (AQAP) to reduce pollution from local industry, transport and construction that complements the AQMA monitoring, with four Air Quality Action Areas (AQAA). The AQAP sets specific strategies to reduce traffic volumes and levels of emissions, with focus in areas of air deficiency: Neasden town centre, Church End, Kilburn Regeneration Area and Wembley

& Tokyngton.⁴⁵⁴ The strategies include: management of emissions from current and new development, community education, increasing green space, planting new trees, identifying low emission neighbourhoods, encouraging Car Clubs, car free initiatives.

Public transport is the third contributor of NO_x emissions in Brent. To fully achieve London's decarbonisation target, the Mayor plans a zero emission transport network by 2050. This plan includes electrifying all rail lines and new energy-efficient trains with on-train management systems and regenerative braking. New trains are to be piloted on the Elizabeth line, then rolled out on the Piccadilly, Waterloo & City, Bakerloo and Central lines from the mid-2020s.⁴⁵⁵

Further consideration to reduced vehicle emissions, particularly in Outer London, will include the implementation of local zero emission zones in town centres by 2050. For construction emissions, consideration is being given to create a Non-Road Mobile Machinery (NRMM) Low Emission Zone, with minimum emissions standards to control the NRMM used in the construction and infrastructure building sector⁴⁵⁶. In Brent, construction is one of the largest contributors to air pollution and this initiative could have positive impacts on air quality. Offsite manufacturing (OSM) techniques and new building technologies provide further opportunities to cut construction site traffic, emissions and build programmes.

Trend 2. Increased Resource Consumption

Brent's growing population will put increased strain upon available resources, including energy and water in the borough. To avoid a looming energy crisis and decarbonise our energy supply, it is imperative Brent make a change in future use of resources (energy, water and waste): balancing population growth and ensuring a good environmental quality.

Energy Demand

Approximately 94% of energy demand is sourced from outside of the city. As the largest proportion of energy use in Brent and London occurs from the domestic sector; the population increase will put significant strain on the domestic energy supply if measures are not taken to improve energy efficiency. It is important to consider that even by reducing energy demand and generating more renewable energy, due to limited space in the city, it will be difficult to achieve full energy self-sufficiency. To reduce energy supply pressures however, it is crucial to encourage developments whenever possible provide on-site renewable technologies, solar energy installations, energy efficiency measures, drainage technologies to reuse and recycle water, and sustainable waste facilities to recycle and recover waste.

In London, electricity accounts for almost half of the total CO₂ emissions. Therefore, in line with decarbonisation policies and targets, GLA project that renewable energy will increase in the following years, reducing carbon base energy and improving energy efficiency. The graphs below indicate GLA energy demand and supply projections for Brent to achieve the zero carbon target for the City, reducing the proportion of fossil fuels resources 60-70% by 2038, and 80% by 2050, and increasing the proportion of renewable energy used by 500%, to reduce 69% of total domestic carbon emissions by 2038 and 87% by 2050, while non-domestic carbon emissions would reduce 88% by 2038 and 97% by 2050 (Figure 227 & 228).

⁴⁵⁴ Brent (2016) Air Quality Action Plan 2017-2022.

⁴⁵⁵ GLA (2018) Mayor's Transport Strategy

⁴⁵⁶ GLA (2018) London Environment Strategy

Figure 227: Projected Brent Energy Supply

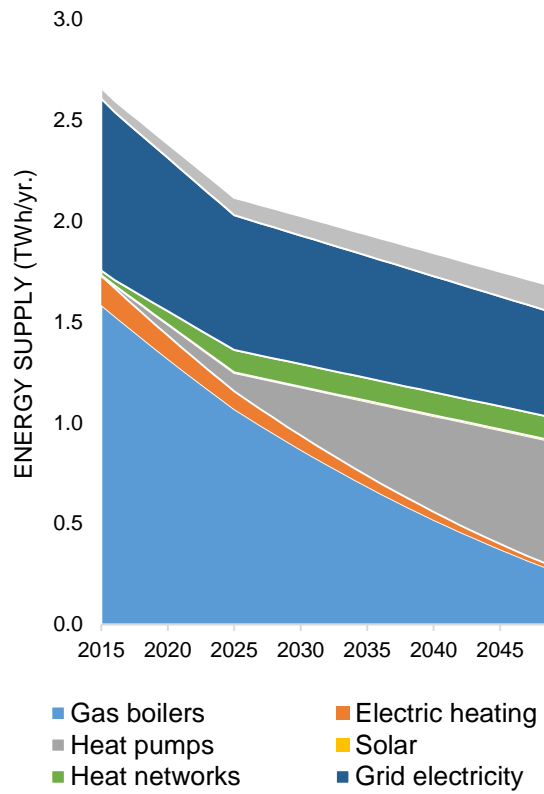
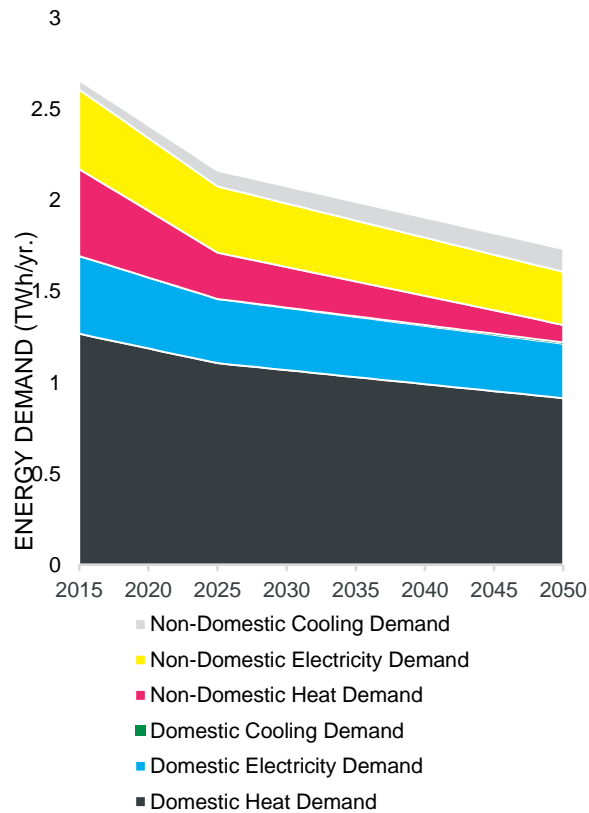


Figure 228: Projected Brent Energy Demand



Source: GLA (2016) Zero Carbon Pathways Tool.

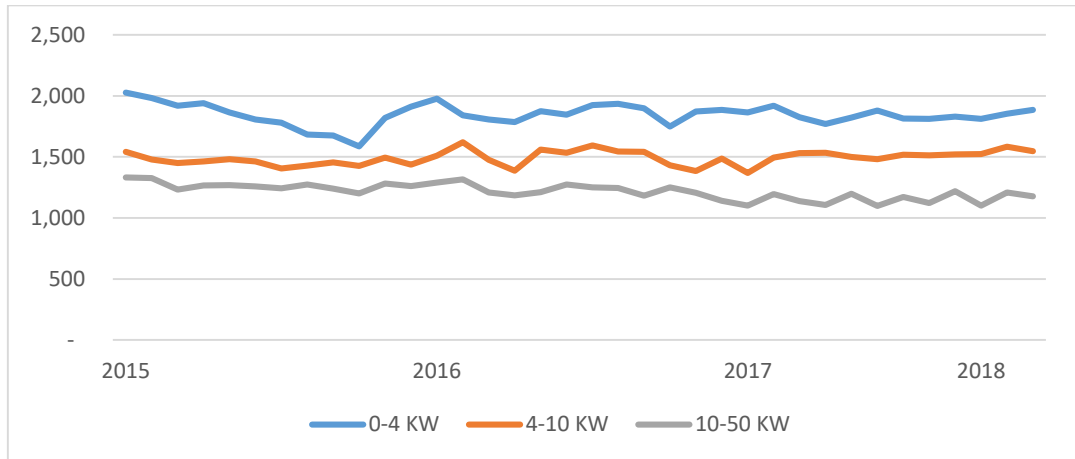
Gas use in London represents around half of total energy consumption. Over 70% of energy is used for heating space and water in homes and work places, 90% of which is from gas-fired boilers, which produce NOx emissions. The Mayor's Energy for Londoners programme will support the transition from old inefficient gas boilers to new ultra-low NOx gas boilers through a cashback scheme. This initiative to replace and improve existing less efficient heating systems could directly benefit Brent, however it is also important to analyse how to optimise energy use and efficiency on new developments, and encourage more renewable and sustainable energy heating systems, such as solar energy, to reduce demand for grid electricity, and combine electricity storage technologies, such as batteries, with solar energy generation.

One of the main barriers to investment in solar technology has been the relatively high cost of installation. Globally, Solar PV use is rising and prices have plummeted over the last three decades, with use up 90% as result of an increasing supply.⁴⁵⁷ In the UK the cost for domestic solar PV installations has followed the same global trend, although with slightly lower growth recently, due to a decrease in demand and a reduction in UK government financial support for solar, and in particular the 64% reduction in feed in tariffs for solar arrays less than 4 kw announced in 2015 (Figure 229).⁴⁵⁸ As a result of this, UK solar capacity grew less during the last two years compared with rates before 2015 (Figure 230).

⁴⁵⁷ The Economist (2012) Science and technology. Sunny uplands.

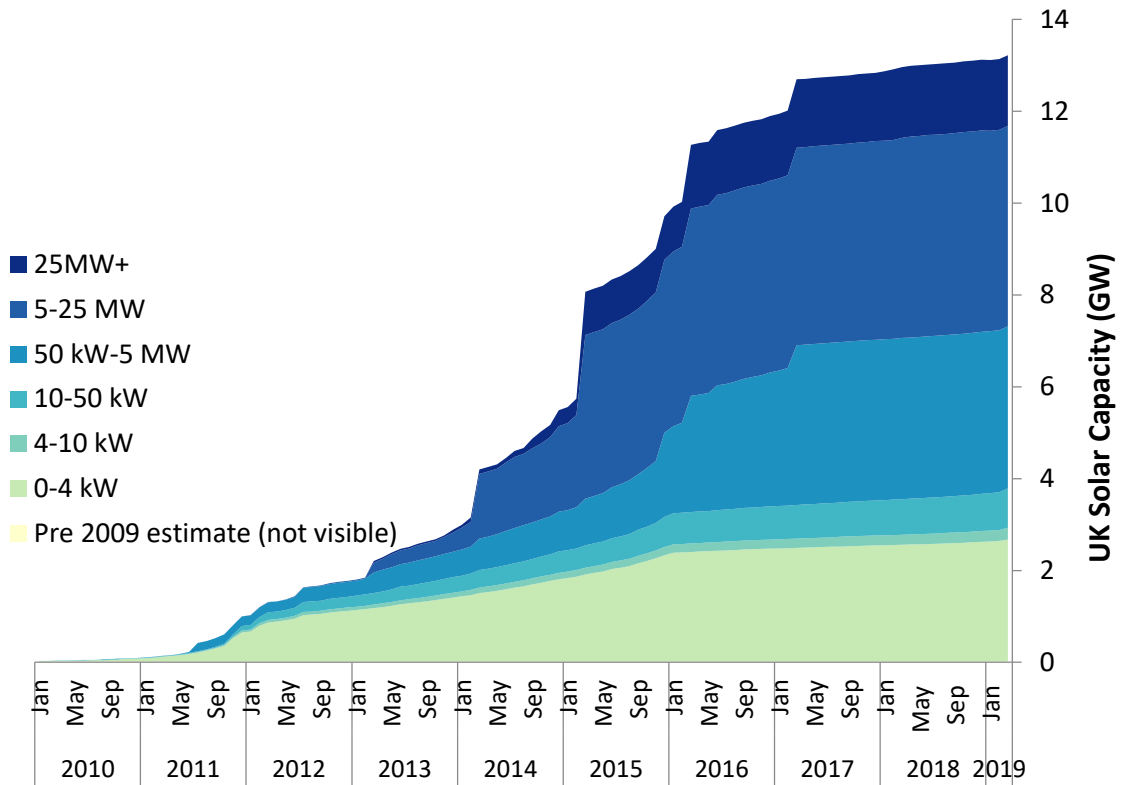
⁴⁵⁸ BEIS (2017) Solar PV cost data.

Figure 229: Solar PV cost per kW installed by size band £ in UK (mean)



Source: BEIS (2018) Solar photovoltaics deployment

Figure 230: UK Solar Deployment by Capacity



Source: BEIS (2019) Solar PV cost data 2019

In current circumstances, lower investment in solar energy on existing UK domestic properties is expected, particularly where the property owner does not directly benefit, such as landlords of private rented homes. Other barriers to investment and installation of solar in London include denser developments and taller buildings leading to shading and lack of suitable space for solar installations, as well as competing development uses for precious roof space, such as amenity spaces and brown, green and blue roofs.

Existing solar generation capacity in London is one of the lowest at national level. The Mayor aims to double London's solar capacity from 95MW to 195MW by 2030, which is the minimum

requirements for solar energy to achieve the zero carbon city target by 2050. GLA estimates London requires solar energy installation with capacity to generate around 1GW by 2030 and 2GW by 2050. The Mayor is therefore encouraging Local Authorities to ensure that new developments include solar energy through the planning process, as well as promoting installation on existing properties, particularly public buildings and major developments.⁴⁵⁹ Brent Council has installed solar PV technology on recently-constructed Council buildings such as John Billam Resource Centre, Willesden Green Library Centre and Roundwood Youth Centre, and some public schools.

Brent Council similarly recognised the importance of increasing energy efficiency, implementing projects such as:

- CMP, carbon management programme to reduce emissions from Council assets.
- REFIT programme funded by the GLA and the EU to help make London’s non-domestic public buildings and assets more energy efficient by implementing retrofit projects through free of charge technical support and guarantees of energy service and cost savings.
- SALIX independent, publicly funded, not-for-profit company, providing 100% interest-free capital finance for energy efficiency in the public sector.

Future plans consider investment in solar panel technologies, primarily on Council assets. Moving forward, investment decisions in residential areas and on private buildings must balance the high cost of investment and execution against increasing demand for energy resources, particularly from domestic use. Specific programmes, such as the proposed District Energy Network in South Kilburn, could have direct effects on energy mix and demand rates in particular areas.

Water Demand

Demand for water is increasing as London’s population grows, and climate change is likely to reduce the amount of water available when we need it most – in the summer. Overall, the London wide baseline demand forecast for annual water demand (before intervention) is expected to increase by 134 MI/d in the period of 2019-2040. This represents a significant challenge, particularly in the face of reductions in water supply capability. Thames Water predict a cumulative deficit of 416 MI/d by 2040 (Figure 231)⁴⁶⁰

Figure 231: Water supply-demand balance for London

WRZ	Item	Volume (MI/d)					
		2019/20	2024/25	2029/30	2039/40	2074/75	2099/00
London (DYAA)	Demand	2020	2068	2093	2154	2326	2376
	Headroom	122	134	136	137	130	130
	Supply	2155	2096	2071	2022	1962	1920
	Balance	12	-106	-158	-269	-494	-587
	(WRMP14)	-133	-213	-292	-416		

Source: Thames Water Revised Draft Water Resources Management Plan 2019

London must reduce the level of water consumption per person to remain sustainable. London’s water supply is in deficit. Over 2017-18, London’s annual water consumption per capita was 120.8 l/d for households in measured (metered) areas, and 159.4 l/d for

⁴⁵⁹ GLA (2017) Draft Solar Action Plan.

⁴⁶⁰ Thames Water (2016) WRMP19 Resource Options.

households in (unmetered) unmeasured areas, and similar consumption levels are observed in Brent.⁴⁶¹ Household water consumption per capita is therefore higher than the Thames Water 125 l/d standard⁴⁶² or the London Plan⁴⁶³

Growth in demand from an increasing population, and falling available supply due to climate change, changes in bulk supply and increased third party abstraction from the River Thames, meaning the gap is predicted to widen if no action is taken, with insufficient water to meet London's needs.

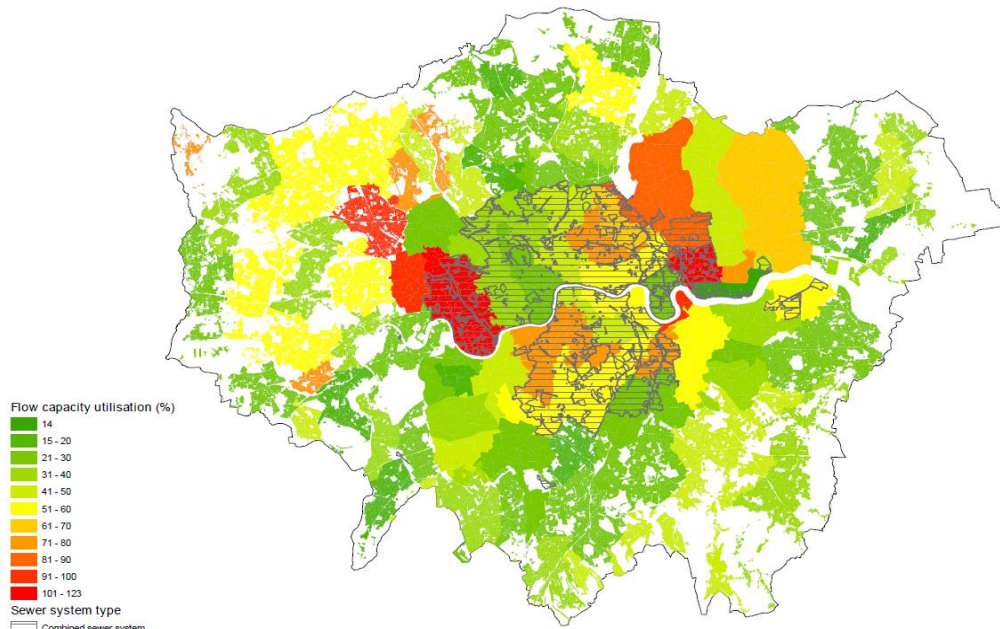
New strategic water resources are therefore required. Water demand and the need for new water infrastructure is exacerbated by climate change predictions of more sporadic and intense rainfall and a higher likelihood of droughts, as well as the need to protect the water environment by implementing the Thames River Basin Management Plan requirements. Thames Water, which provides over three-quarters of Londoners with water, projects a significant and growing capacity deficit moving forward.

To ensure London's future water security, the prudent use of water will be essential: all new development will need to be water efficient. Residential development should be designed so that mains water consumption would meet a target of 105 l/d per capita, excluding an allowance of 5 l/d per capita for external water use.⁴⁶⁴

Drainage and sewerage network

London's tributary rivers suffer poor maintenance, pollution from road run-off and water treatment and sewer infrastructure problems. Parts of the drainage and sewerage network in London have limited capacity, which is predicted could lead to increased risk of surface water and sewer flooding if no actions are taken. The map below highlights in red the areas where GLA predict sewage capacity will exceed requirements, including in Brent (Figure 232).

Figure 232: Capacity of the drainage Network-Thames Water



Source: GLA (2018) London Environment Strategy

⁴⁶¹ Thames Water (2017 & 2018) Environment Agency Annual Review 2016-17 and 2017-18

⁴⁶² CLG / DEFRA (2007) Water Efficiency in New Buildings

⁴⁶³ Mayor of London (2016) London Plan : Chapter Five : London's Response to Climate Change

⁴⁶⁴ GLA (2016) London Plan, Chapter 5: London's Response to Climate change.

Waste

The London Plan highlights the importance of managing and reducing waste, and supporting the circular economy. The New London Plan therefore sets recycling targets for construction, excavation and demolition waste at 95% by 2020, and municipal waste at 65% by 2030.⁴⁶⁵

The London Plan projects how much municipal waste and commercial and industrial waste is likely to be generated in the capital over 2021 to 2041. Each borough is allocated an amount of London's waste that it is required to positively plan for and manage. This includes ensuring that sufficient capacity is identified to meet the apportioned targets in the London Plan. By each borough meeting its apportionment, London can dramatically reduce its reliance on landfill and move towards being net self-sufficient overall. Waste arising for Brent and partner boroughs in the West London Waste Plan are indicate in Figure 233. The percentage share of London's total waste to be managed by Brent and the West London partnership is indicated as apportionment in Figure 234.

Figure 233: West London forecast arising of total waste (000's tonnes)

	2021	2041
Brent	260	274
Ealing	291	306
Harrow	188	205
Hillingdon	347	367
Hounslow	260	276
Richmond	180	191
London	8216	8726

Figure 234: West London Borough-level total apportionments (000's tonnes)

	% London waste to manage	2021	2041
Brent	5.0	412	438
Ealing	6.6	543	576
Harrow	1.9	151	170
Hillingdon	5.1	423	450
Hounslow	5.0	407	432
Richmond	1.8	148	157
London	100.0	8,216	8,726

Source: GLA (2017) *The London Plan: The Spatial Development Strategy for Greater London. Draft for public consultation.*

For the West London Boroughs to meet the New London Plan apportionment targets for household and commercial & industrial waste, the West London Waste Plan indicates additional capacity of 448,000 tonnes will be required by 2021, and 587,000 tonnes by 2041 (Figure 235). The land required to provide this additional capacity was calculated based on previous figures from West London Waste Plan.⁴⁶⁶

Figure 235: West London capacity requirements for target years based on the New London Plan

	2011	2016	2021	2041
Apportionment (000's tonnes)	1399	1595	2084	2223
Total existing waste management capacity (000's tonnes)	1636	1636	1636	1636
Additional capacity required to meet the apportionment (000's tonnes)			448	587
Land Required to address the capacity gap (Has)			6.9	9.1

Source: GLA (2017) *The London Plan: The Spatial Development Strategy for Greater London. Draft for public consultation &*, WLWP (2015) *West London Waste Plan.*

⁴⁶⁵ GLA (2017) *The London Plan: The Spatial Development Strategy for Greater London. Draft for public consultation.*

⁴⁶⁶ WLWP (2015) *The West London Waste Plan 2015.*

Trend 3: Low Carbon Circular Economy Model

The circular economy model has shown positive impacts to London, including Brent, although there is more to improve, particularly reducing environmental impacts. The circular model builds economic, natural and social capital. Innovation to the current circular model includes increasing emphasis on reducing carbon emissions through the use and reuse of resources before they become waste; including the manufacture of goods to higher quality standards.

As a result of the Paris Agreement on Climate Change and the 2030 Agenda for Sustainable Development, the UK together with over 150 countries has agreed to decarbonise their economies and make them more climate-resilient, opening increasing export opportunities for the goods and services needed in a low-carbon economy. In London this sector is expected to grow over 6% a year by 2020.⁴⁶⁷ In the EU, it is estimated this model could reduce CO₂ emissions by 8.2% and save 219 billion cubic metres of water by 2020.⁴⁶⁸ Worldwide global exports for low carbon good and services could be worth £1-1.8 trillion a year by 2030, equivalent to 7 to 12 times more than today.⁴⁶⁹

The potential of the circular economy model is to extend from the clean technology sector to other sectors including transport, industry, consumer products and services. Such growth could bring environmental and economic benefits in Brent, which has been observed to have a relatively strong existing circular economy compared to other London boroughs. Old Oak and Park Royal is identified as having potential to develop SMART and sustainable districts.

The New London Plan indicates that low carbon circular economy principles should be taken into account on new developments at every stage, starting with the design process, ensuring waste reduction, using materials that can be re-used and recycle, and building in layers to facilitate maintenance and repairs.⁴⁷⁰

Trend 4: Increased Demand for Sustainable Transport and Car Use

Road transport is one of the main sources of air pollution, and it is therefore important to reduce road transport and promote a mode shift to walking, cycling & public transport. London's Councils are responsible for 95% of roads, therefore they have a major role to play in finding innovative actions to tackle this issue. Brent expects high levels of growth over the next 20 years, with the population due to increase by 66,000 people, and 21,500 new homes built. Growth makes it imperative trips to and from development areas are carried out by sustainable transport modes to limit impacts on the transport network and the environment. Growth areas should continue to be selected so that new development is co-located with more highly accessible public transport, and to minimise the need for residents to own a private vehicle. Adequate transport investment is required to ensure development takes place on a sustainable basis, is accessible for all users, and does not place undue pressure on transport networks. Improved connectivity and junction improvements, as well as developing more bespoke strategies and frameworks, is required to support these growth areas.

The London Environment Strategy 2018 aims to transform London's air quality to become the best of any major World City by 2050, controlling current emission sources, mainly related with road transport. This strategy sets out specific initiatives that will have direct effects on Brent's air quality, such as transforming London's bus fleet to zero emission by 2040. The current bus fleet transformation plan only covers 17% of Brent's Bus Routes to 2020. All taxis are planned

⁴⁶⁷ GLA (2018) London Environment Strategy.

⁴⁶⁸ EU (2017) Policy levers for a low-carbon circular Economy.

⁴⁶⁹ Carvalho and Fankhauser (2017) UK export opportunities in the low-carbon economy.

⁴⁷⁰ GLA (2017) The London Plan: The Spatial Development Strategy for Greater London. Draft for public consultation & LWARB (2017) London Circular Economy Route map.

to reach zero emissions by 2033, and all vehicles to reach zero emissions by 2050.⁴⁷¹ In addition, it is proposed to expand the Ultra-Low Emission Zone (ULEZ) London-wide for buses, coaches and lorries by 2020, and to the North Circular Road for cars, minibuses and motorbikes by 2021.⁴⁷² The North Circular is the busiest, most congested and polluted road in Brent, with NO₂ values exceeding allowable limits. However, the North Circular Road only represents 1% of London road network, and in order to secure air quality improvements in the shortest possible time, the Mayor encourages targeted local measures such as local road closures and vehicle restrictions, particularly on fossil-fuelled vehicles; as well as work with London Councils on possible changes to the London Control Scheme.

The London Infrastructure Plan 2050 sets out plans to provide a projected 70% increase in rail and tube capacity serving London's economic heart, serve 1.5 million new homes, improve the capital's international connectivity and dramatically improve transport's contribution to Londoners' quality of life.⁴⁷³ As a borough, Brent has little control over TfL new strategic infrastructure investment and expansion to address the transport and accessibility needs across London and within the borough. Brent does however have an important role to play in reviewing the evidence, identifying priorities and lobbying GLA and TfL, and in delivering Local Implementation Plan (LIP) projects. Brent can also focus on increasing capacity at existing stations within the borough, enabling and improving the number of trains that can run in Brent.

Given current car use rates, if accessibility is not improved in areas with lower PTALs, it is projected licensed car registered in Brent could increase by up to 21% by 2038, generating additional demand for parking in the borough, and negative environmental impacts from increased traffic, congestion and pollution. To curb car use, sustainable modes of transportation should be encouraged, especially active modes of transportation. The expected levels of growth over the next 20 to 30 years will place more pressure on the road network, so if it is to be accommodated without affecting the quality of life of Brent residents, more journeys must take place by sustainable modes. These include walking, cycling and public transport.

Brent's population projections also indicate an increasingly ageing population. Transport accessibility should be considered in light of accessibility parameters, including step free access that caters to a population whose current preferred mode of transport is the car.

Car Clubs

Car Clubs have a significant potential for growth in Outer London where there is high private car ownership. Such schemes could help to meet city mobility needs, reducing reliance on private and commercial cars, reducing parking pressures and addressing environmental problems through more efficient use of cleaner vehicles. There is evidence that Car Club members drive significantly fewer miles than other drivers, and are early adopters to changing patterns of mobility using public transport, walking and cycling.

The Council's Long Term Transport Strategy includes a commitment to draw up a Car Club Management Plan that will aim both to provide encouragement for Car Clubs in Brent, and provide a framework by which space on the highway can be equitably allocated between competing Car Club operators and private vehicle owners.

In 2018 Brent Council resolved to implement a flexible car club. Car Clubs are able to provide a number of benefits, in London, a single Car Club replaces at least 10 cars. In 2016, for each round-trip using Car Clubs, 10.5 cars were removed from the road as a result

⁴⁷¹ GLA (2017) London Environment Strategy. Draft for public consultation.

⁴⁷² TfL (2017) Press release. GLA Mayor plans to introduce ULEZ in April 2019.

⁴⁷³ GLA (2014) London Infrastructure Plan 2050.

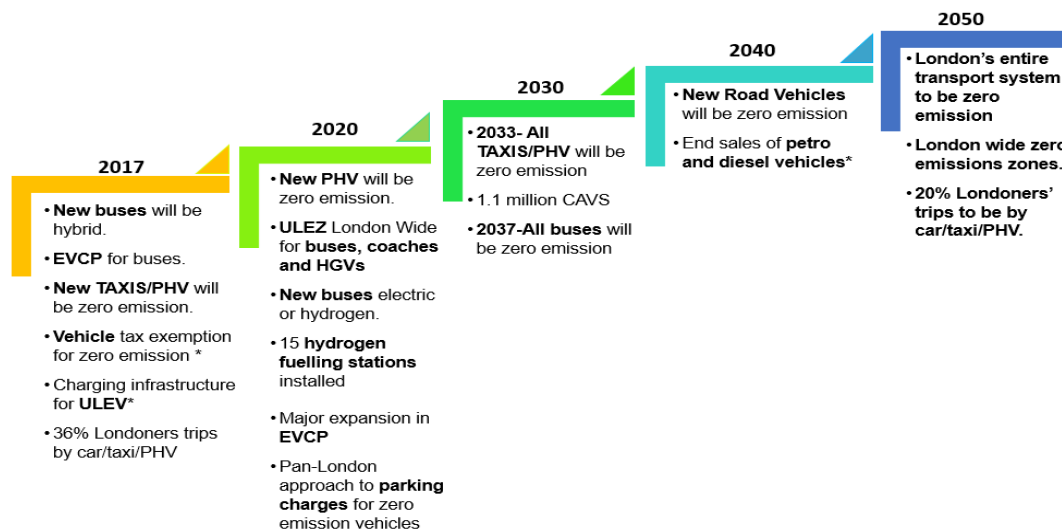
of a Car Club members selling their cars, equating to almost 26,400 fewer vehicles in the city.⁴⁷⁴ A study found that the average age of vehicles disposed of by its members was 14.4 years. The removal of older vehicles will assist in improving the air quality of our streets and making them more pleasant environments. In addition, trends also indicate a widening of the flexible car club member profile to include a larger proportion of older members and those with families⁴⁷⁵.

The Council facilitates the provision and enforcement of on-street Car Club bays in the borough, and will seek to increase their number where there is a clear demand. The Long Term Transport Strategy includes a target to increase the number of Car Club vehicles available to Brent residents by 20% by 2035.⁴⁷⁶

Electric Vehicle and Charging Stations

Electric Vehicles and adequate supporting charging stations infrastructure will play a key role to achieve national and local environmental targets, particularly zero emission road transport planned to be completed by 2050 as is shown in Figure 236 below.

Figure 236: Mayor’s Zero Emission Transport Plan



Note: (*) Measures included in the National Policy for zero emissions. Source: GLA (2018) Mayor’s Transport Strategy

In London and Brent the number of ULEVs has increased despite the limited EVCP infrastructure available. Based on employment level, historic hybrid sales and income in Brent, GLA estimates that by 2020 there could be between 1,208 and 2,293 ULEVs, which would represent roughly 1-2% of the number of vehicles on Brent’s roads, if numbers continue increasing at today’s rates. By 2025 there could be between 4,786 and 8,551 ULEVs, which would represent roughly 3.8%-6.8%, of the number of vehicles on Brent’s roads today⁴⁷⁷. Despite current and forecasted growth in ULEVs in Brent, these numbers are still too low to meet the target that all road transport is ULEV by 2050, as shown in Figures 237 and 238.⁴⁷⁸

⁴⁷⁴ TfL (2017) Car Clubs

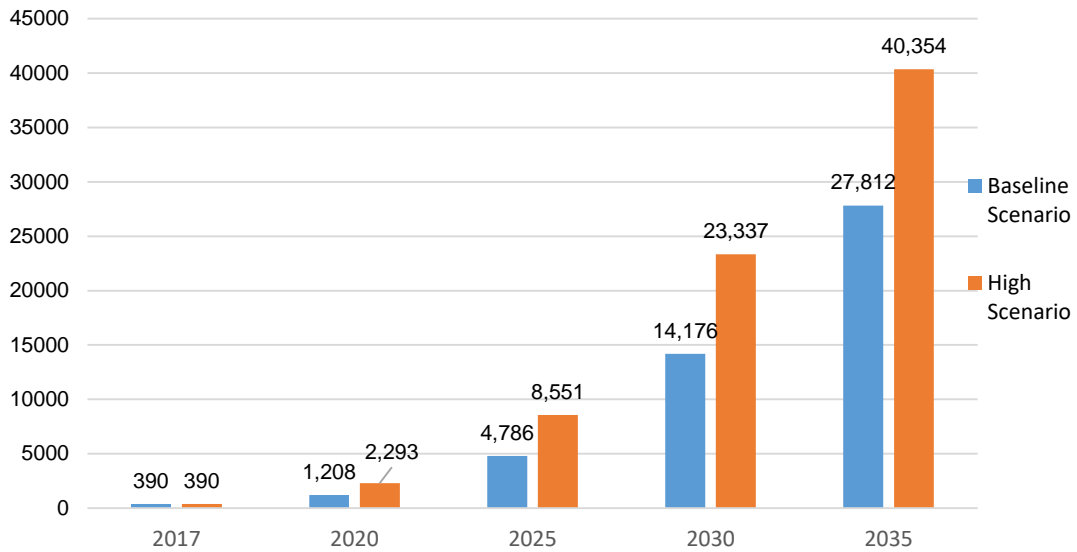
⁴⁷⁵ Brent (2018) Cabinet Paper Flexible Car Clubs

⁴⁷⁶ Brent (2015) Parking Strategy 2015

⁴⁷⁷ TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London: cleaner vehicles for a cleaner city.

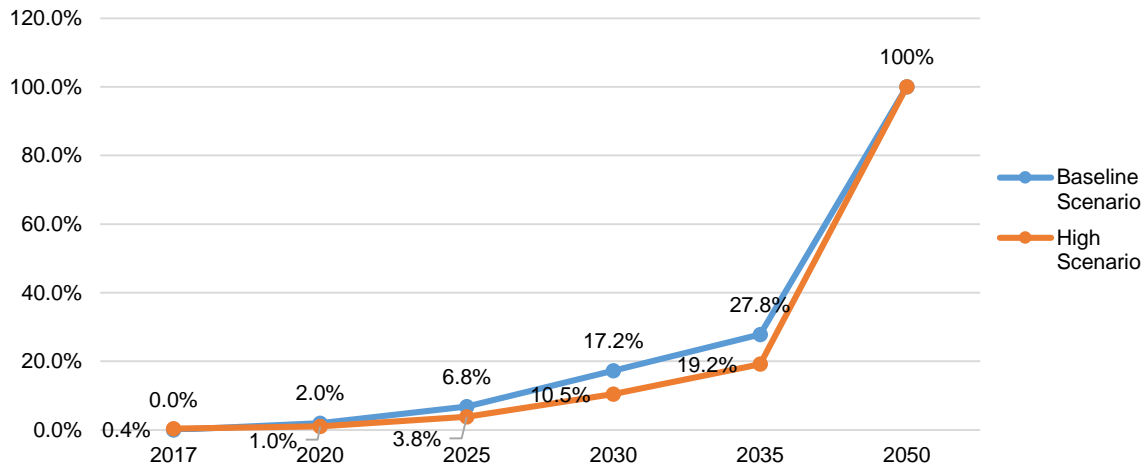
⁴⁷⁸ Forecasts not consider a transport mode shift, only took into account economic variables that impact the consumption patterns and historical growth rates

Figure 237: Forecast ULEVs in Brent 2017-2035



Source: DfT (2017) Vehicle licensing statistics VEH0131 & TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London

Figure 238: % Cars, Motorcycles and Vans ULEVs in Brent forecast for 2017-2035 and target by 2050



Source: DfT (2017) Vehicle licensing statistics VEH0131 & TfL (2015) An Ultra-Low Emission Vehicle Delivery Plan for London

Higher local incomes and availability of charging infrastructure for electric cars would significantly increase the number of EVs. Additional measures implemented in European cities to support increased take up of environmental friendly vehicles include: differentiated charging roads schemes for diesel cars and EVs, free parking for vehicles with zero emission, permission for EVs to use restricted road spaces such as those for buses, different tax incentives that reduce the initial financial outlay required to buy a new electric car.

Car Clubs provide an important benefit in improving air quality, and electric Car Clubs have the potential for even greater benefits. The Car Club fleet on average emits 29% less CO₂ than the average vehicle, and 99% of Car Club cars are compliant with the ULEZ in London⁴⁷⁹. If EVs are used in the fleet there is both the potential to drive down emissions further and

⁴⁷⁹ Steer Davies Gleave (2017) Carplus annual survey of car clubs 2016/17.

increase familiarity with the use of cleaner vehicles to a wider audience. Currently however only 5% of the Car Club fleet available in Brent uses this technology⁴⁸⁰.

BlueCity is an electric Car Club and part of French company Bolloré's planned to put 3,000 units on London's streets by 2018. BlueCity started operations in Hammersmith and Fulham and currently operates in 18 London boroughs, but not in Brent. BlueCity hopes to deliver its service in all 32 boroughs, however, argues expansion has been delayed over agreements with Local Authorities to provide supporting infrastructure such as EV parking bays.⁴⁸¹

Cycling

Cycling has been prioritised within the Mayor's Transport Strategy as a zero emission and congestion-reducing transport mode that has benefits for both society and the individual. Cycling on London's main roads has risen by 173% since 2001. GLA plans to double cycling over the next 10 years, with significant investment is required to support this growth, Analysis shows that more than half of the potentially cyclable trips in the Capital are in Outer London. These total around 2.4 million a day, most of which are made by car.

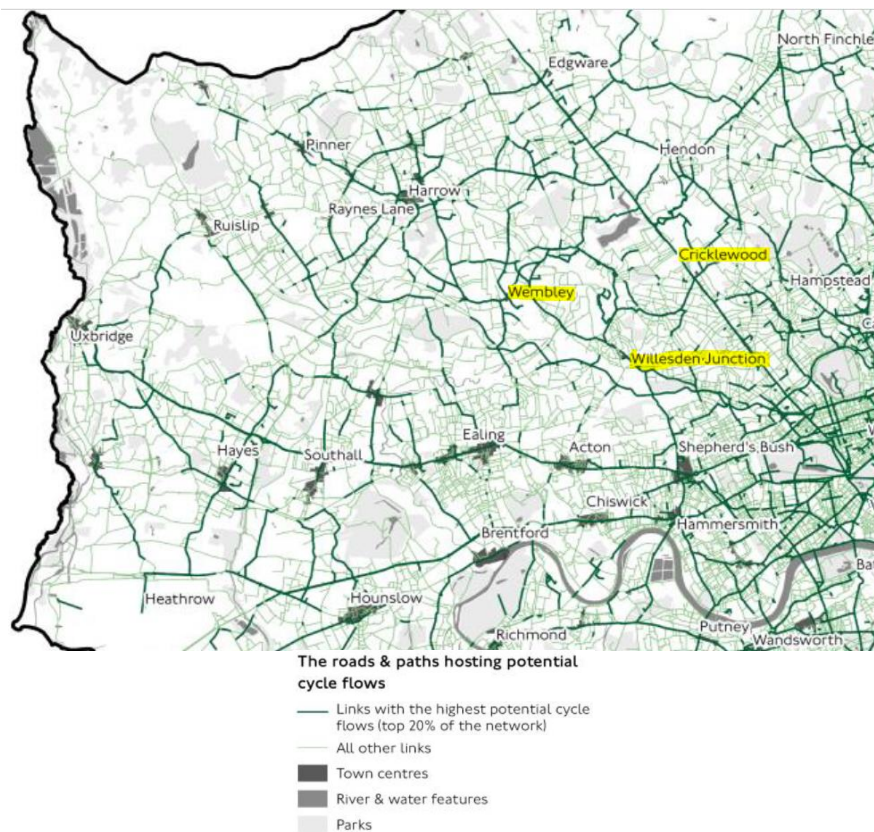
The Mayor of London aims to achieve a 400% increase in levels of cycling by 2026 (from a base year of 2000), resulting in an average 5% mode share for cycling across London. To help achieve this, a focus has been placed on the Outer London Boroughs, including Brent.⁴⁸² Further, in 2016 TfL implemented the Mayor's Healthy Streets strategy to reduce car use, and increase walking, cycling and use of public transport, including identifying potential routes where cycle flow could be increased such as the North Circular Road (Figure 239).

⁴⁸⁰ TfL (2017) Car Clubs

⁴⁸¹ Blue city (2017) News.

⁴⁸² Brent (2016) Cycle Strategy 2016-2021

Figure 239: Roads and paths hosting the highest potential cycle demand



TfL (2017) Strategic Cycling Analysis: identifying future cycling demand in London.

Walking

Trips undertaken by walking instead of private vehicles reduce the number of car journeys and therefore lower CO₂ emissions. Walking combined with use of public transport also assists the reduction of both air and noise pollution and delivers a wide range of personal health benefits. These modes work together to improve air quality and help to lower the causes of climate change. Walking in town centres also supports local businesses and jobs.

The careful design of Brent's streets within a wider public realm is essential to creating vibrant, safe and accessible places that encourage walking. To enhance the experience of walking in Brent, the Walking Strategy will work alongside the Brent Placemaking Guide and best practice industry standards of good urban design.⁴⁸³

Trend 5: Increased Demand for Green Areas and Environmental Recreation

Given the population projections over the next 20+ years, pressure on resources and the natural environment will continue to grow. Accessibility to green spaces is sometimes limited, increasing inequalities of opportunities for leisure and health outcomes. To maintain and improve quality of life for Londoners, as well as safeguarding economic growth, interventions to protect the natural environment will therefore need to be undertaken. Investment in public parks represents exceptional value for money. Additional to the environmental benefits, for each £1 spent by Local Authorities and partners, citizens could enjoy at least £27 in value. In

⁴⁸³ Brent (2017) Walking Strategy 2017-2022.

London, recreational activities have an estimated value of £926 million per year, and also contribute to temperature regulation and carbon storage.⁴⁸⁴

To ensure access to green space, green and blue infrastructure in Brent must be protected from urban development, and the quality of space must be improved. Improved quality of green space may additionally have spill-over effects on other areas of environmental significance, such as air pollution. The economic and health benefits of quality green and blue infrastructure are wide ranging. A study undertaken by Natural England estimated that the savings to the NHS through having increased access to green space for every household in England equated to £2.1 billion per annum. Access to green space has considerable distributional effects for households and land owners, with previous analysis from GLA Economics modelling that house prices within 600 metres of a regional or metropolitan park were between 1.9% and 2.9% higher.⁴⁸⁵

Green infrastructure is essential to provide economic, social and environmental benefits, although restriction in open space suitable for green areas is the main barrier. The London Plan encourages planned, designed and managed green and open spaces for new and current developments. Brent Council commits to this aim by implementing open space and tree management policy. However, the Mayor's long term target to make more than 50% of London Green⁴⁸⁶ challenges current thinking and strategies in Brent, considering the limited land available and development pressures for new housing. The Mayor encourages new provision or improved access in areas with limited or deficient access to public open space.

The Mayor's target is for tree cover to be increased by 10% by 2050. London's existing trees and woodlands are valued at £133 million per year, due to their environmental benefits, such as trapping air pollutants, storing carbon, provide shading, absorbing rainwater and filtering noise. The cost of replacement is calculated at £6.2 billion, and Brent Planning consider adequate compensation and replacement of loss of trees according CAVAT or i-Tree Eco mechanisms as indicated by the London Plan.

Trend 6: SMART Sustainable Cities

Issues surrounding rising population growth and climate change can be managed through information and communication technologies (ICTs), addressing urbanisation challenges and ensuring sustainability. ICTs could assist by improving energy and water efficiency, minimising resource consumption and operating and managing urban infrastructure.

The SMART city model has been conceptualised as an overarching solution to bring sustainability to cities by making them "smarter", using digital and technological infrastructure, and where access and adequate management of big data play a key role to understand population needs. Although, there is not a universal definition "SMART sustainable city" could be defined as *an innovative city that uses ICTs and other means to improve quality of life, efficiency of urban operation and services, and competitiveness, while ensuring that it meets the needs of present and future generations with respect to economic, social, environmental as well as cultural aspects.*⁴⁸⁷ This concept highlights the importance of using ICTs to improve operational efficiency, generating new economic value to the city and Local Authorities, as well as social and environmental wellbeing.

Brent Council has a Digital Strategy that includes some plans within a "SMART sustainable model" by looking to capitalise on the Internet of Things (IoT) using sensors and monitors to

⁴⁸⁴ GLA (2017) Natural capital accounts for public green space in London.

⁴⁸⁵ GLA (2016) Economic Evidence Base for London 2016, Chapter 7: The economics of London's environment.

⁴⁸⁶ GLA (2017) The London Plan: The Spatial Development Strategy for Greater London. Draft for public consultation.

⁴⁸⁷ UNECE (2015) United 4 Smart Sustainable Cities

promote self-care and help vulnerable residents live more confidently and independently in their own homes for longer. In addition, by introducing drones into housing services we will perform quicker and cheaper inspections of high rise aerials, cables and roof gutters, eliminating the need for scaffolding and improving response times for issues reported by residents⁴⁸⁸.

The future of SMART sustainable cities is linked with data management; what data is obtained and how it is used to improve resource and asset management. Information obtained from current technologies implemented in Brent include SMART meter and grid technologies to manage demand and supply of water and energy, the “cleaner app” to inform about fly-tipping in the borough, which should be upgraded and complemented with additional innovative ICTs moving forward.

Examples of ICTs used in SMART sustainable models that have direct benefits to the environment include: 3D visualisations of infrastructure, reducing unnecessary road works, CCTV to detect traffic incidents and queuing alerts, open data to inform road traffic to users that could choose alternative routes including different modes of transport⁴⁸⁹, drones to report situation surveillance to data systems or remotely-placed human operators.⁴⁹⁰

Trend 7: Reduced Enviro-Crime and ASB: Working with Communities

Local authority budgets for street cleaning are often restricted, and therefore it is important to involve contractors, business, volunteers and individuals who work with local communities to manage street cleaning. Working in partnership with local residents improves community cohesion and increases the quality of the environment. Research suggests that such efforts should be reinforced in areas with higher deprivation and lack of access to green spaces, which often have a poor quality local environment and higher ASB rates.⁴⁹¹

Some best practice initiatives implemented in England that could be analysed on introduced into Brent include:

- Developing an increased sense of community ownership. e.g. LB Islington cleaned 1,000 m² of graffiti in two days by inviting local young people to paint an agreed mural; LB Lambeth implemented a community-driven initiative named “Community Freshview” where residents propose ideas to improve the quality of the environment and the Council helps them to implement them with the support and direction of two Council officers who provide advice and all the necessary tools and materials required.⁴⁹²
- Training programmes that involved community with experts. e.g. the “citizens juries” programme realised in the south of England that increased the rate of waste recycling
- Map common enviro-crime problems to tackle more effectively hot spots such as the one realised for ASB in Brent. e.g. LB Hackney mapped ‘grot spots’ that impact on street cleanliness perception, such as cigarette litter and commercial waste from office buildings and bars; the City for London reduced urination and vomit by officers mapping out the locations where this occurs and installing porta-loos in affected areas.
- Campaign to create awareness about waste crime and its negative implications to health and environment. e.g. LB Barking and Dagenham initiative to change resident behaviour with education, publicity and community volunteering to clean-up streets.

⁴⁸⁸ Brent Digital Strategy 2017-2020

⁴⁸⁹ GLA (2016) The Future of Smart: Harnessing digital innovation to make London the best city in the world. Update report of the Smart London Plan.

⁴⁹⁰ Jensen O B (2016) Drone city-power, design and aerial mobility and aerial mobility in the age of smart “cities”

⁴⁹¹ Keep Britain Tidy (2015) How clean is England. The Local Environmental Quality Survey of England 2014/15.

⁴⁹² London Councils (2011) Enviro-crime busters: Best practice on LEQ enforcement in London.

In the UK, fly-tipping or illegal waste activities costs over £60 million in clean-up costs and enforcement actions, with 70% of Local Authorities describing these activities as a growing problem. Although the budget for cleaning is restricted, investment into tackling waste crime could have a direct return to the public sector finances. A recent report by the Environmental Services Association suggested that for every £1 invested on tackling waste crime there could be a £4.40 return.⁴⁹³ Effective and targeted resource allocation is key.

Community-led initiatives should also be encouraged to tackle ASB. In Brent, current thinking is to implement “the community watch model”, a programme that promotes the recruitment of community members to self-police their own neighbourhoods, with potential positive effects including developing a sense of community and increasing levels of social awareness and involvement in local issues.

⁴⁹³ POST (2017) Environmental crime.

Responses

Previous sections have examined the current baseline and future trends for the Environment in Brent. Much information is framed within the context of climate change as presenting difficult challenges to be addressed in order to supply resources and deliver environmental services to the residents of Brent. Many of these challenges can however be reframed as opportunities through the provision of innovative green infrastructure into the future. By addressing the environmental challenges in Brent, the borough can simultaneously seize opportunities to secure health, connectivity and economic benefits for its residents, protecting and enhancing the environment and making Brent a better place to live for all.

Brent must focus on creating urban developments that are planned, designed and managed so as to deliver a range of benefits, including: healthy living, mitigating flood risk, improving air and water quality, cooling the urban environment, encouraging walking and cycling, reducing resource consumption, and enhancing biodiversity and ecological resilience.

Sustainable Transport

Accessible and frequent public transport and high quality facilities for walking and cycling influence the way people travel. Encouraging their use would reduce environmental impacts and parking and traffic management pressures generated by the use of private motorised vehicles. Adapting sustainable transport capacity to meet the needs of a growing population will be a significant challenge for Brent. London's transport network is controlled and financed by TfL, however the Council can seek to plan and manage the location of new developments and growth in areas well-connected to public transport. The Council can also analyse transport needs in more densely populated areas, identify strategic and local priorities, and lobby GLA and TfL for targeted investment, including under the Local Implementation Plan (LIP). Brent must also create strategies to facilitate modal shifts in order to adapt to increase capacity and encourage sustainable transport use, rather than continued use of motorised vehicles.

Trips by tube originating in Brent are currently an average distance of 11.75 km, and commuting out of the borough far outweighs commuting trips in. Distances of 11.75 km are not likely to be entirely shifted to walking or cycling, but it is possible to encourage inter-modality, so that more parts of trips are taken via bicycle or walking in connecting with a transit station. Road safety is one of the main barriers to increase the number of people cycling and potential users indicate that training could reduce this barrier, therefore increased training campaigns in combination with the specialist cyclist from the community that use current paths, could increase the number of cyclist in roads. Promotion of current cycle paths and improved cycle facilities and infrastructure, would also help facilitate this modal shift.

Retention of local employment and jobs within the borough also importantly limits the amount of out-commuting and strain on the transport system, while supporting local commuting distances that are short enough to be appropriate for walking and cycling. To accommodate the inevitable rise in tube and train journeys occurring in Brent, the borough should work to improve the capacity at existing stations and continue to lobby GLA and TfL with respect to expansion of local transport infrastructure.

Demographic shifts toward an ageing population must also be considered when designing a sustainable transport strategy. Older populations in Brent are currently more likely to choose the car as their primary choice of transport and future technological improvements such as driverless cars could enable older people to continue driving. Issues relating to mobility impairment, such as lack of step free access at tube stations, must be addressed in order to meet the transport needs of an ageing population. In order for an ageing population to be able to access everyday needs, improving the walkability of existing urban developments

and properly planning for the walkability of new developments, including easily accessible goods and services, must be a focus for the borough. The Council should encourage walking and cycling whenever possible, to provide health benefits and reduce social isolation, and to that effect age friendly infrastructure with an integrated approach to the planning and design of road networks, cycle lanes, safe crossing and level pavements is recommended.⁴⁹⁴

Given the population pressures, a focus on sustainable and accessible urban design that includes dense, multi-use high street developments would enable modal shifts towards walking and cycling while reducing carbon emissions and improving air quality. A shift towards active modes of transportation would likely lead to improved health in the borough by improving accessibility to everyday physical activity and simultaneously reduce air pollution related illness.

Climate Change

To achieve the Mayor's carbon emission reduction target of 60% by 2025 and national carbon emission reduction targets of 80% by 2050 relative to 1990 levels, and to move towards a zero carbon city, Brent already implements some actions in line with the Mayor Environment Strategy (MES). Brent should intensify related transport infrastructure provision and management improvements, such as street parking permit charges based on vehicle emissions, car free developments and EVCP infrastructure; and energy provision and efficiency. Brent could also move to pilot and deliver others interventions mentioned in the MES and implemented in other boroughs, such as restriction on fossil fuel vehicles through road charging schemes similar to the Congestion Charge and Low Emission Zone, or selective local road closures in areas with increasing levels of congestion or where public transport is accessible, such as town centres, housing estates and high streets. Other proposed fiscal measures could include increasing surcharges on resident parking permits with diesel vehicles, and reducing tariffs for those with electric vehicles.

Construction represents a growing source and proportion of air pollution. It is therefore critical to reduce the pollution generated both on and off construction sites. New clean technology has the potential to replace ageing fleets of diesel diggers, excavators and inefficient generators and lighting rigs. Offsite factory manufacture can drastically reduce waste materials, noise, dust and litter on site – and reduce defects and shorten build times. The Council can better recognise innovation in building technology and cleaner construction when procuring development partners to deliver regeneration and development across the borough.

SMART technologies could be harnessed to achieve environmental targets working together with industry, academia and citizens, with ICTs providing solutions in an effective manner.⁴⁹⁵ The current pilot planned in Brent to measure air quality would effectively monitor carbon emissions, but more ICTs could be used such as current drone infrastructure for aerial mapping and monitoring, plant conservation, planning and regulation enforcement activities.⁴⁹⁶

Energy Mix

Population growth and the electrification of the heat and transport sectors will increase energy demand in Brent. In order to achieve the national and local carbon emission targets, and support decarbonisation of electricity and gas, Brent must not only maximise energy efficiency in the built environment and encourage behavioural change in energy use by consumers, but oversee a transformation in the energy mix. It is important to encourage the

⁴⁹⁴ ILC (2015) The future of transport in an ageing society.

⁴⁹⁵ BEIS (2013) The Smart City Market: Opportunities for the UK.

⁴⁹⁶ Sensefly (2017) Drones for environmental protection & Conservation.

use of clean and renewable energy sources such as energy from waste, solar PV and thermal systems, as well as combined electricity storage technologies such as hot water cylinder to store heat, batteries to store electricity generated off-peak or solar CHP concentrating solar PV-thermal hybrid technologies.⁴⁹⁷

To deliver increased solar energy generation it is important to work with the Mayor, homeowners and landlords, developers, businesses, charities and private investors. Planning permissions for new developments are fundamental to securing the use of these kind of technologies, requiring developers to deliver new on-site renewable energy. Brent should also promote to households and businesses the financial, social and environmental benefits of generating electricity and hot water with renewable sources. Benefits include local and national grants available for installation cost, and for delivery on the existing built environment, and help and advice for households and businesses to make informed decisions about investment in green energy technologies. The Council could also replicate the RE:FIT London Programme at a local level to provide an expert free of charge, but working with academia and communities to support citizens to get energy renewable projects up and running.

Delivery of district energy programmes planned in Brent such as for South Kilburn and Wembley should be prioritised and accelerated, then rolled out and implemented in more opportunity areas and major new developments, including business and industrial areas, in order to reduce domestic and commercial energy consumption. These programmes should consider the new combined heat and power system (CHP) criteria and the London Environment Strategy to reduce Atmospheric Emissions such as through ultra-low NOx gas boilers.⁴⁹⁸ Combined cycle gas turbines can achieve 70-80% heating efficiency, maximising power production⁴⁹⁹. Similarly, the New London Plan indicates that boroughs should ensure that all developments maximise opportunities for on-site electricity and heat production from solar technologies including photovoltaic and thermal. Major developments should also deliver communal heating systems that use clean heat or zero power emission sources.

Circular Economy

The circular economy model shows positive impacts in London, including Brent, building economic, natural and social capital, and having the scope to reduce CO2 emissions and environmental impacts. Potential innovations include increasing emphasis on reducing carbon emissions through the use and reuse of resources before they become waste, including the manufacture of goods to higher quality standards, and the establishment of clean-tech hubs in the boroughs strategic industrial locations including Park Royal and Wembley.

Waste management, including provision of adequate disposal facilities that work effectively for residents, should be addressed in new residential developments from the design stage. Construction accounts for half of the waste production, while households account for 17% waste production, in London. With an increasing population and the proposed New London Plan 2,915 annual housing target for Brent, the Council must prioritise waste management and explore the potential to generate low-carbon energy from suitable remaining waste.

Green & Blue Infrastructure

For green and blue infrastructure management, issues related to flooding, water supply, and green space maintenance should be integrated into a comprehensive strategy. To address flooding, river and sewage flooding should be addressed through further integrated sustainable urban drainage systems (SUDS) and green spaces should be designed and

⁴⁹⁷ Kalam, King, Moret et al (2012) Combined heat and power systems: economic and policy barriers to growth.

⁴⁹⁸ GLA (2018) London Environment Strategy.

⁴⁹⁹ Kalam, King, Moret et al (2012) Combined heat and power systems: economic and policy barriers to growth.

adapted to accommodate flood water during heavy rainfall events. Gray water recycling, green roofs, and swells should be better integrated into urban design to retain rainwater and put less strain on the drinkable water supply. Existing green spaces can provide further benefits through retrofitting, improving quality and increasing accessibility. Improving green spaces in the borough has the potential to lead to public health improvements and help mitigate against heat island effects from climate change. Increasing the number of trees in the borough in highly urbanised areas could extend the benefits of green spaces, created shade and improving air quality along busy traffic corridors. It is important to continue working with communities to encourage their participation in Mayor's grants such as "Community Tree Planting and Green Space", and the maintenance of the trees and green areas in their neighborhood. As Brent is densified and population increases, the need for quality accessible green space will become more intensified. Green space improvements for recreation and health should be integrated with environmental management to address flooding, air quality, and biodiversity issues in the borough.

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Brent Inclusive Growth Strategy (IGS): Health

2019-2040

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Executive Summary

The report is divided into three parts: **Baseline**; an overview of the fundamentals of health in Brent, **Trends**; emerging trends and forecasts for the health sector now and moving forward to 2040, and **Responses**; identifying some policy interventions that could help to mitigate the potential issues and take advantage of the opportunities expected to impact Brent.

Baseline

- Brent is one of London's most ethnically diverse boroughs, with 66.4% of the population belonging to different BAME groups. The vast majority of residents described their health as very good, and healthy life expectancy levels are similar to the national average (63.9 years).
- The three biggest causes of premature deaths (below 65 years old) in Brent are cancer, cardiovascular diseases and heart disease. The mortality rate from cardiovascular disease was at 91 per 100,000 people in 2015-17, and ranked 120th out of 150 Local Authorities.
- In 2016, Brent was named as the fattest London borough (Kilburn Times). In 2017/18, 56.4 % of adults (aged 18+) were classified as overweight or obese, which was below the level for England (62%). In 2017/18, children entering Reception year overweight or obese was at 28.5% and those leaving in Year 6 is 43.3%, far higher than the levels for London and England
- 73 schools are signed up to the GLA's Healthy Schools Programme, but only 3 have been awarded Gold Status. The mortality rate for cancer in Brent is 118 per 100,000 which is relatively low, ranked 19th out of 152 Local Authorities and far lower than the rate for England.
- Mental health remains the single largest cause of morbidity within Brent, affecting one quarter of all adults at some time in their lives. In Brent, one out of 5 people reported high anxiety levels in 2013/14. Social isolation can also have negative effects on mental health.
- Asthma emergency admissions to hospitals were 271.5 per 100,000 in 2013/14
- Asthma hospital admissions were 205 per 100,000 for under 19 year olds in 2017/18.
- In 2016/17, 0.3% of residents used cycling for travel and 25.3% walked for travel at least 5 times a week. In comparison, 0.7% of residents cycled for leisure and 5.3% walked for leisure at least 5 times a week.
- Around half of all pupils walk to school in Brent, with most residents living within 1,500m of a primary school. Use of green space for health reasons or exercise in the borough is low (3 out of 20).
- Fuel poverty (the inability to adequately heat a home) is caused by low incomes and the high costs of heating energy inefficient properties. In Brent in 2017, it was estimated 14.9% of households experienced fuel poverty, higher than London at 11.8% and England at 10.9%.
- Health is the second largest economic sector in Brent. In 2016, 18,000 people worked in the Health and Social activities sector, representing 15% of employment in Brent, higher than the London (9.8%) and UK (13.3%) averages. There are currently 51 GP practices in Brent. London North West University Healthcare NHS trust, which includes Central Middlesex, Ealing, Northwick Park and St Marks hospitals, employs over 9,500 clinical and support staff. The health sector has recruitment and retention issues, which is a problem across London, mainly due to high living costs.
- Formal Adult Social Care in Brent consists of the Council commissioning private provider of home care supported living.

Trends

- Brent's population is projected to grow by 17% between now and 2040, when it will nearly exceed 400,000 people. At the same time, the population will age significantly. By 2040, 28% of people over 65 years old, will be over 81 years old or greater, and therefore require increased care provision.
- Due to the growing and ageing population, the number of older people with higher dependency is predicted to rise by 62% between 2015 and 2035. By 2020/21 public spending on social care would need to increase by a minimum of £1.65 billion, to a total of £9.99 billion, in order to manage the impact of demographic and unit cost pressures alone.
- Increasing elderly people with care needs is expected to increase the number of people having to provide informal care, and has led healthcare organisations to focus on measures to better integrate health and social care.
- 11.6% of Brent's population were estimated to have diabetes in 2017, significantly higher than the 8.7% of London's population. Diabetes rates are predicted to increase to 13.6% in 2035. Moreover, a potent mix of an ageing population, high number of obese residents, and higher number of people likely to be affected due to their ethnic background, is predicted to cause an even higher prevalence of diabetes moving forward.
- The prevalence of common mental disorders is expected to remain relatively flat, however the number of people suffering from dementia will rise significantly.
- Poor housing conditions and rising housing costs all have an impact on health. Poor housing conditions are much more prevalent in rental accommodation, a million people living in the PRS in poverty. The past 20 years. London's PRS doubled in just over a decade and continues to rise and 40% of London's households could be private renters by 2025.

Responses

This report concludes with proposals that Brent Council could take forward to address the challenges and seize the opportunities presented by the future trends in health. Responses include:

Neighbourhoods in Brent are transforming in order to accommodate population growth. While increasing density of development is necessary to accommodate growth, careful attention must be paid to good design, infrastructure, management arrangements and place-making, to ensure denser development is sustainable and supports health and wellbeing. At a grassroots level the council could offer health based initiatives targeted in wards with poor health outcome.

Improvements in diabetes care has come from better treatment options, especially in relation to complications associated with the disease. Clinical studies suggest that specialist diabetes inpatient teams can reduce prescribing errors; improve patient outcomes; reduce length of stay; increase day case rates and reduce the number of admissions. Economic modelling for NHS Diabetes suggests that the savings from introduction of these teams can substantially outweigh the cost of the team.

Mental wellbeing deserves greater consideration, particularly as urban planners and government often focus more upon physical health. Mental health is affected by the design of the built environment, and better consideration for mental health at planning stage is emerging as a key trend.

The use of technology in healthcare has a variety of potential uses. For example, remote consultations offer potential advantages to patients (who are spared the cost and inconvenience of travel) and the healthcare system (as they may be more cost-effective).

Instead of differentiating between health and social care, it could improve the efficiency of these services to take a more holistic approach to care for certain population groups. The NAIL project provides a good example. If financial pressures on the NHS and other areas of the healthcare system continue to grow, unmet demand for care will need to be covered by volunteers and friends and family members of people requiring care, or, more starkly, standards of care will fall or demand for care remain unmet.

Social determinants of health are largely outside the scope of those who deliver healthcare, with risks driven by individual behaviour (smoking, diet, exercise) in the context of societal influences (housing, schools, employment) and environmental factors (air quality, physical environment). Work can be done by the council to shape societal influences. Other Local Authorities have promoted IT literacy in the elderly as a way of addressing social isolation, help young people develop positive and healthy behaviours, by engaging them in sport as a distraction from crime, providing volunteering opportunities and work experience, developing key employability skills and introduce mandatory traffic light labelling and nutritional information on menus in all restaurant and food outlet chains in London, by using their byelaw and licensing powers. Using its power, knowledge and resources, the council should seek to create integrated approaches to societal issues to positive impact health outcomes for its residents.

Introduction

London is set to grow significantly over the next 20 years. As London's economy and population grows as a whole, Outer London boroughs will need to develop and evolve in order to benefit and accommodate as they grow with it. Health in the context of the city is multifaceted, requiring an understanding of demographics and the many social and environmental factors and behaviours that are determinants of health, alongside the health and care systems that are expected to deliver the services and treatments to address ill health and disease. Health inequality and lifestyle choices, including travel and consumption behaviours, have significant impacts upon our chances of enjoying good health. The increasing densification of the urban built environment within which the population lives and works, including an increasing amount of older people, presents particular challenges in design and planning to ensure places are accessibility and support people's physical and mental health. The healthcare sector faces increasing demand and funding pressures, which concurrently provide economic opportunities including for employment and technology. Health directly impacts residents throughout their lives and therefore strategies need to consider the short, medium and long term.

This report is divided into three sections **Baseline**, reviewing evidence on the current picture of people's health in Brent, including health demographics, the causes of premature death, aspects of physical and mental health, health inequalities and the wider determinants impacting health, and the health and social care sector, including systems and provision that supports people's health and delivers health services in Brent. **Trends**, identifying some of the most pressing considerations for the health of the city moving forward, including the changing demographics, ageing population, funding pressures, new and emerging approaches to healthcare provision, and wider determinants that impact health including housing, employment and the importance of urban design and infrastructure to people's health and wellbeing. **Responses**, finally highlights some of the potential pathways to follow that can ensure that the borough is best equipped to address future pressures and impacts on health and health needs.

Baseline

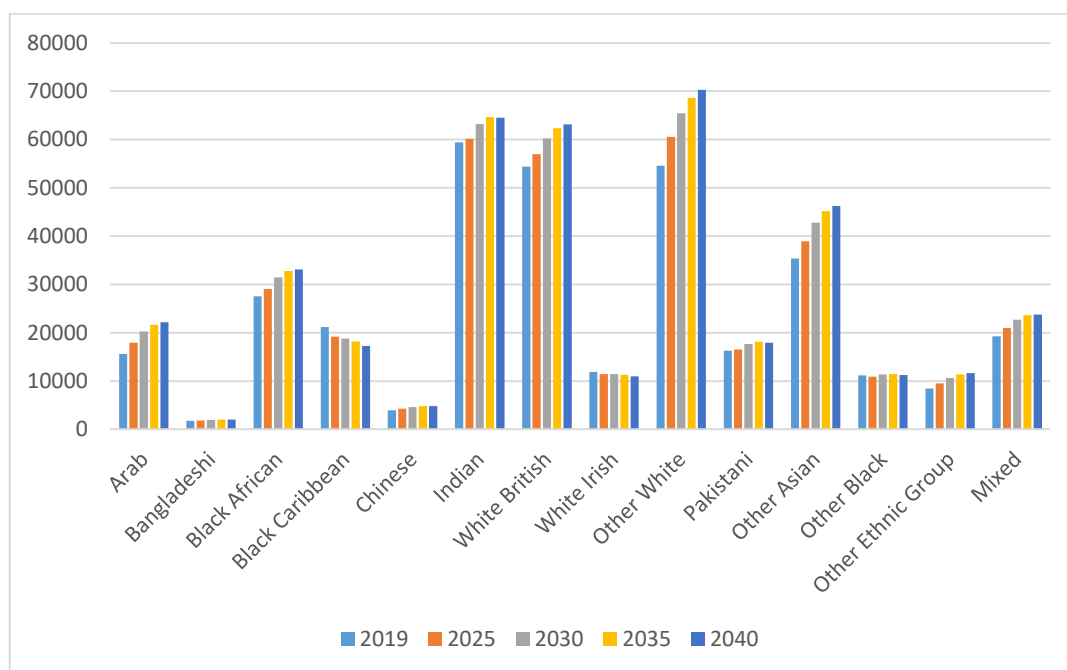
This section will outline the current situation in Brent. Firstly, looking at the boroughs demographics, health and providing an overview of the population. Secondly, looking at current areas of interest relating to health in Brent including; premature deaths and obesity, mental health, diabetes and other illnesses. Then going on to the wider determinates of health and the Health and Social care sector in the borough.

This will provide an overview of the current situation and key themes to focus on in the future.

Demographics

Brent is one of London’s most ethnically diverse boroughs, with 66.4% of the population belonging to different BAME groups⁵⁰⁰. The population is young, with 22.9% of residents being under 18 years and 35.1% aged between 20 and 39⁵⁰¹. Diversity is spread across all age brackets, with 46% of residents over 75 years belonging to BAME groups.⁵⁰²

Figure 240: Ethnicity Change



Source: Diversity in Brent Profile 2018

In the 2011 Census, the vast majority of people in Brent (83%) described their health as “very good” or “good”, a similar picture to England and Wales as a whole (81%). Only 5% described their health as “very bad” or “bad”; with the remaining 12% saying it is “fair”.⁵⁰³

In Brent, healthy life expectancy (i.e. number of years an individual can expect to live in good health) for males in 2015 - 17 was 62.4 years. This was similar to the average in England which was 63.4 years. Healthy life expectancy for females in 2015-17 was 65.0 years

⁵⁰⁰ JSNA 2015 Brent Overview Report

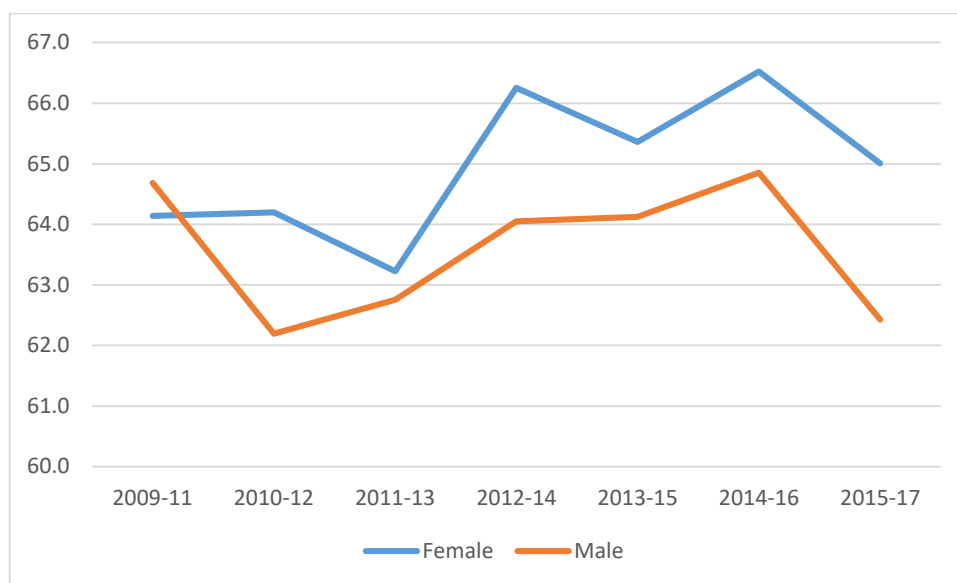
⁵⁰¹ Ibid.

⁵⁰² Annual report of the director of public health for Brent 2014

⁵⁰³ JSNA 2015 Brent Overview Report

(England: 63.8 years).⁵⁰⁴ The 2015-17 healthy life expectancy decreased by 1.5 years from 2014-16 for females and by 2.5 years from 2014-16 for males.

Figure 241: Healthy Life Expectancy in Brent

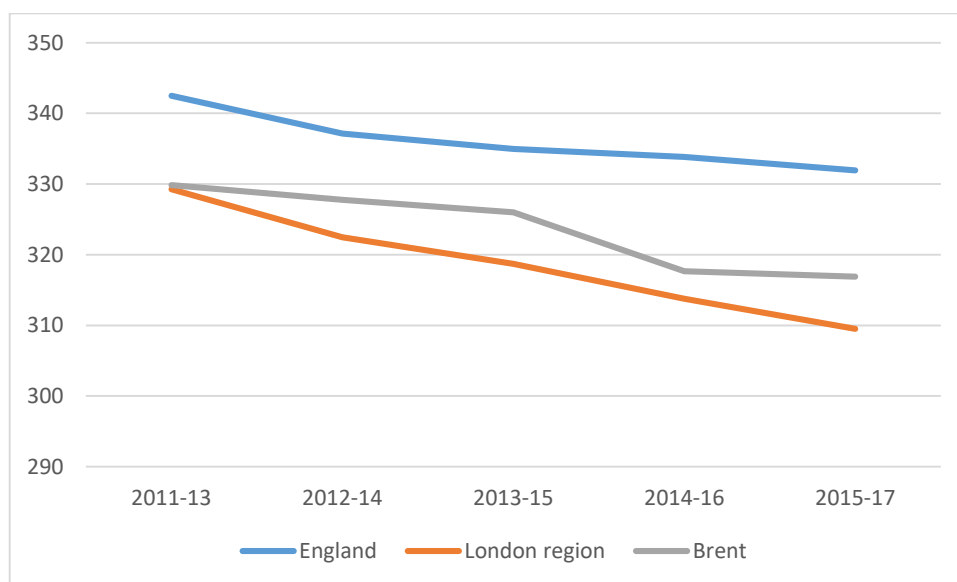


Source: Health state life expectancies, UK: 2015 to 2017 ONS

Priority Health Considerations

The rate of premature deaths in Brent was 317 per 100,000 populations, between 2015-17. Brent is ranked 56th out of 150 Local Authorities⁵⁰⁵.

Figure 242: Under 75 age standardised mortality rate (all causes) per 100,000 population



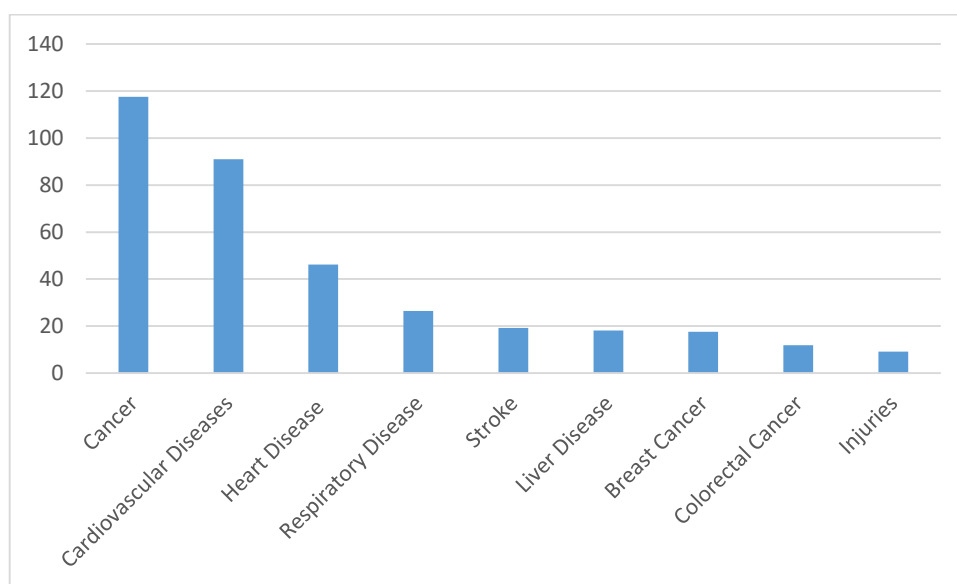
Source: Public Health England Healthcare and Premature Mortality

⁵⁰⁴ Office for National Statistics (2018) Healthy state life expectancy – all ages, UK. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/healthstatelifeexpectancyallagesuk>

⁵⁰⁵ Public Health England Local Authority Health Profile 2018

The three most prevalent causes of premature deaths (before the age of 75) in 2015-17 were cancer, cardiovascular and heart disease.⁵⁰⁶

Figure 243: Causes of Premature Death 2015-2017



Source: Public Health England, [Mortality Rankings](#), Brent

The most common cause for premature death in Brent is cancer. The mortality rate for cancer is 118 per 100,000 Brent is ranked 19th out of 152 Local Authorities and is far lower than the rate for England.⁵⁰⁷

The mortality rate from cardiovascular disease in Brent was at 91 per 100,000 people in 2015-17, and ranked 120th out of 152 Local Authorities. When reviewing the historical data, it is striking that whilst the rate for Brent has decreased since 2013-15, across London and England, the rate has been continually decreasing since 2001-03 and at a much faster rate⁵⁰⁸.

Finally, the premature mortality rate from heart disease in Brent was at 46.2 per 100,000 people in 2015-17, and ranked 102nd out of 152 Local Authorities, slightly higher than the rate for London (38.5) and England (38.7)⁵⁰⁹.

Obesity

Obesity can have wide ranging effects on health and quality of life. Beyond causing obvious physical changes, obesity can lead to a number of serious health conditions, including diabetes, heart disease, some forms of cancer and strokes. Obesity can additionally lead to psychological problems, such as depression and low self-esteem⁵¹⁰.

⁵⁰⁶ Public Health England Mortality rankings <http://healthierlives.phe.org.uk>

⁵⁰⁷ PHE Local Authority Profiles

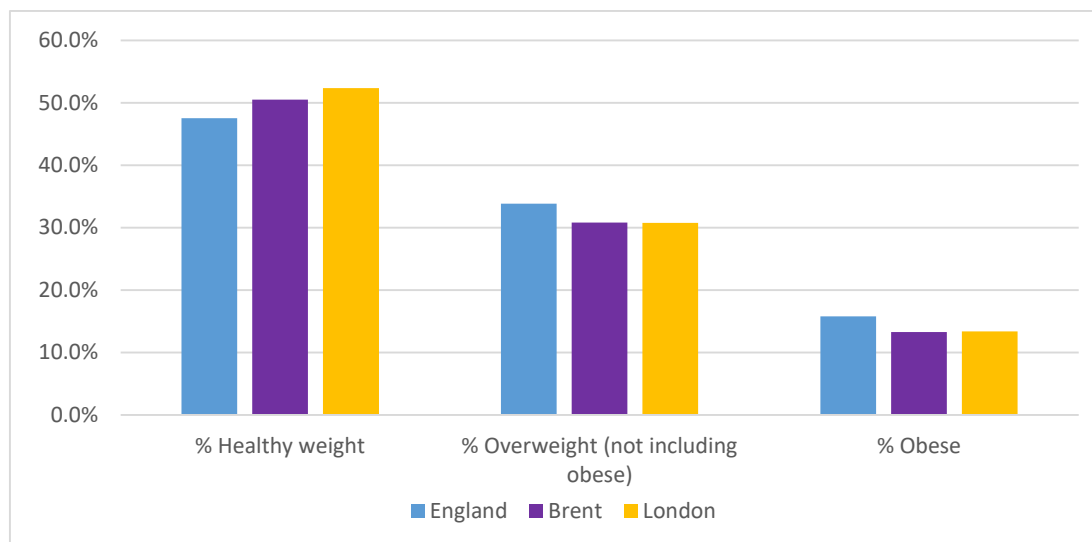
⁵⁰⁸ Ibid. <https://fingertips.phe.org.uk/profile/mortality-profile/data#page/4/gid/1938133009/pat/6/par/E12000007/ati/102/are/E09000005/iid/40401/age/163/sex/4>

⁵⁰⁹ Annual report of the director of public health for Brent 2014

⁵¹⁰ NHS Obesity Overview

In 2016, Brent was named as the fattest London borough (Kilburn Times⁵¹¹). In 2017/18, 56.4% of adults (aged 18+) were classified as overweight or obese, which was below the level for England (62%)⁵¹². These levels have broadly stable since 2016, as they have in London and England⁵¹³.

Figure 244: Obesity Levels



Source: Public Health England weight among adults at local authority level for England 2013-15

Childhood obesity in the borough is especially high, which is problematic as early years' obesity is the biggest determinate of obesity in later life. In 2017/18, in Brent 28.5% of children entering Reception year were classified as overweight or obese and 43.3% of children leaving in Year 6 were overweight or obese, far higher than the levels for London and England (Figure 245)⁵¹⁴. From 2007/8 to 2017/18, the prevalence of overweight (include obese) reception children has increased by 29%; in the same period, the prevalence in London and England has been stable, with slight decreases of 4% and 1% respectively⁵¹⁵. Many children start school carrying excess weight, and the proportion who are overweight or obese increases during primary school years⁵¹⁶.

⁵¹¹ Kilburn Times, 05 May 2016, Brent named as the 'fattest borough' in London. Accessible at <http://www.kilburntimes.co.uk/news/brent-named-as-the-fattest-borough-in-london-1-4523843>

⁵¹² PHE percentage of adults (18+) classified as overweight or obese 2017/18

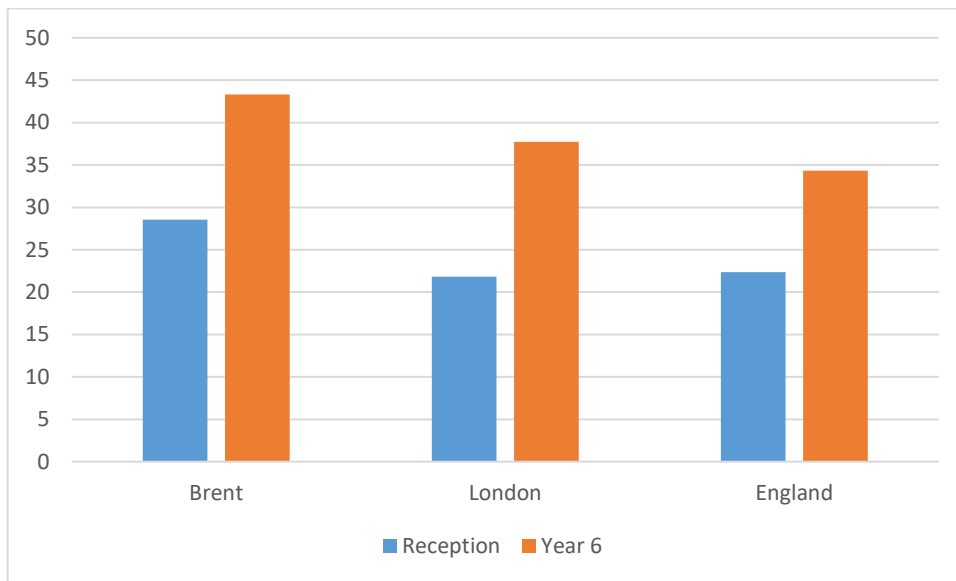
⁵¹³ PHE percentage of adults (18+) classified as overweight or obese 2017/18

⁵¹⁴ Public Health Outcomes Framework accessed: <https://fingertips.phe.org.uk/profile/public-health-outcomes-framework/data#page/4/gid/1000042/pat/6/par/E12000007/ati/102/are/E09000005/iid/20601/age/200/sex/4>

⁵¹⁵ Public Health Outcomes Framework accessed: <https://fingertips.phe.org.uk/profile/public-health-outcomes-framework/data#page/4/gid/1000042/pat/6/par/E12000007/ati/102/are/E09000005/iid/20601/age/200/sex/4>

⁵¹⁶ Ibid.

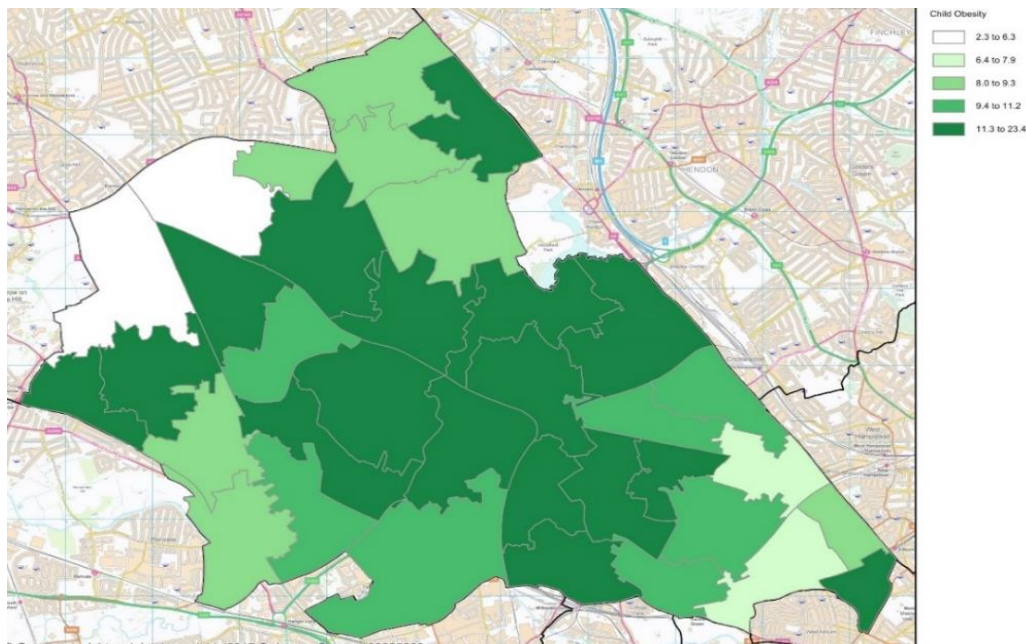
Figure 245: Percentage of children who were overweight or obese in Reception and Year 6



Source: Public Health England: Public Health Profiles 2017/18

There is a clear correlation between deprivation and childhood obesity. In Brent, about 23% (15,500) of children live in low income families⁵¹⁷. The most deprived children in Reception Year and Year 6 are two times as likely to be obese than the least deprived children in both these years.

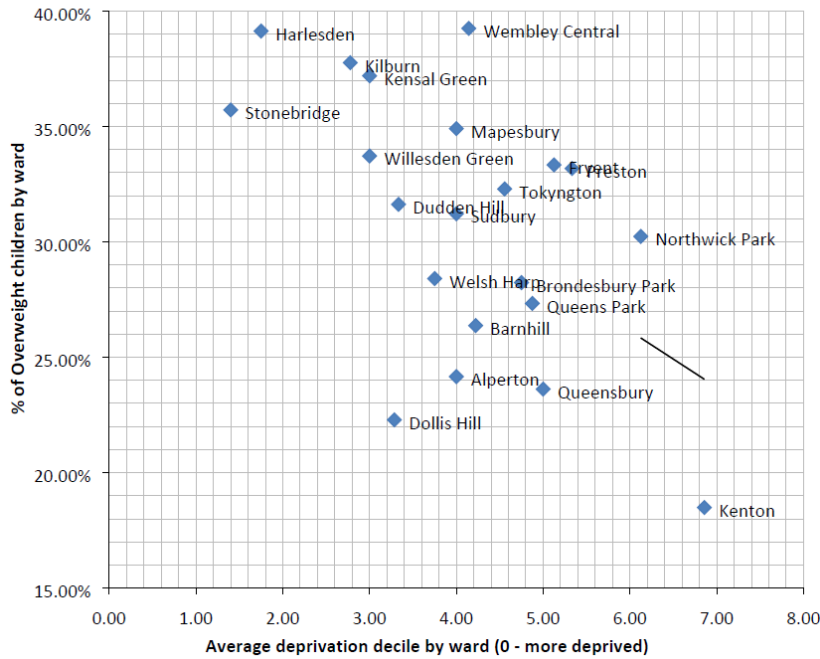
Figure 246: Child Obesity distribution in Brent



Source: Brent GIS Council Mapping Service

⁵¹⁷ Public Health England Brent Health Profile 2017

Correlation between Obesity and Deprivation



These trends in overweightness and obesity can be attributed to two factors: insufficient physical activity and unhealthy nutrition patterns.

The Active People 8 survey shows over half (51.6%) of Brent’s adult population do not undertake sport or physical activity, the highest level of inactivity in West London, and above the London average. The same survey shows only 18.5% of Brent’s population are achieving the recommended level of moderate intensity sports or active recreation per week.⁵¹⁸ Although the sample was relatively small (507 respondents) this highlights some trends in physical activity in Brent. The table below further outlines trends in physical activity.

Figure 247: Physical activity in Brent across age groups

Age Range	16-34 years	35-54 years	55+ years
Oct 2011 – Oct 2013	26.1%	17.1%	8.2%
Oct 2012 – Oct 2014	25.2%	18.4%	11.6%
April 2013 – Mar 2015	24.9%	15.9%	11.9%
Oct 2013 – Oct 2015	23.1%	17.1%	12.1%

Source: Brent Physical Activity Strategy

Physical activity decreases by age. However, while activity levels over 2011 to 2015 have decreased for the 16 to 34 year olds, activity levels have increased in the 55+ year age group.

⁵¹⁸ JSNA 2015 Brent Overview Report

Nutrition

Only 47.1% of the population in Brent were meeting the recommended 5-a-day fruit and vegetable intake in 2014. This was below the London (50.3%) and England (53.5%) averages.⁵¹⁹

The Healthy Schools London scheme is a GLA sponsored programme to enhance children's health and wellbeing. In 2019, 2112 schools were registered to the scheme, with an additional 2133 schools receiving awards. The scheme awards recognise school achievements in supporting the health and wellbeing of their pupils on a bronze, silver gold ranking system. In Brent, 73 schools are registered with the scheme, out of which 43 were awarded bronze and 16 silver statuses and 3 Brent school have been awarded a gold status⁵²⁰. This is far behind our neighbouring boroughs of Barnet, Ealing and Harrow (Figure 248).

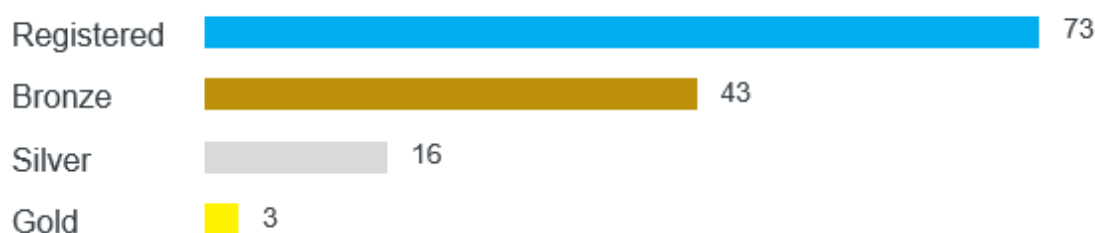
Figure 248: Healthy Schools in Brent and selected boroughs

Borough	Registered	Bronze	Silver	Gold
Brent	73	43	16	3
Barnet	114	63	39	21
Camden	56	45	23	7
Ealing	90	71	71	23
Harrow	54	33	20	12
Hillingdon	64	33	16	4
H&F	53	39	22	7
Westminster	55	37	26	12

Source: Healthy Schools London

Figure 249: Healthy Schools in Brent

Brent



Source: Healthy Schools London Website

Diabetes

Diabetes is a condition where there is too much glucose in the blood because the body cannot use it properly. People with Type 2 diabetes do not produce enough insulin, or the insulin they produce does not work properly. About 90% of people diagnosed with diabetes have Type 2. Diabetes accounts for about 10% of the NHS budget and 80% of these costs are due to complications. Demographic changes and the high obesity rate mean that, if the costs of treating a patient with diabetes stay the same, the overall costs of diabetes are set to grow over the next 20 years, when it is projected to account for 17% of the entire NHS budget. Diabetes is expensive. It costs the NHS £10 billion each year. This is mainly because of its

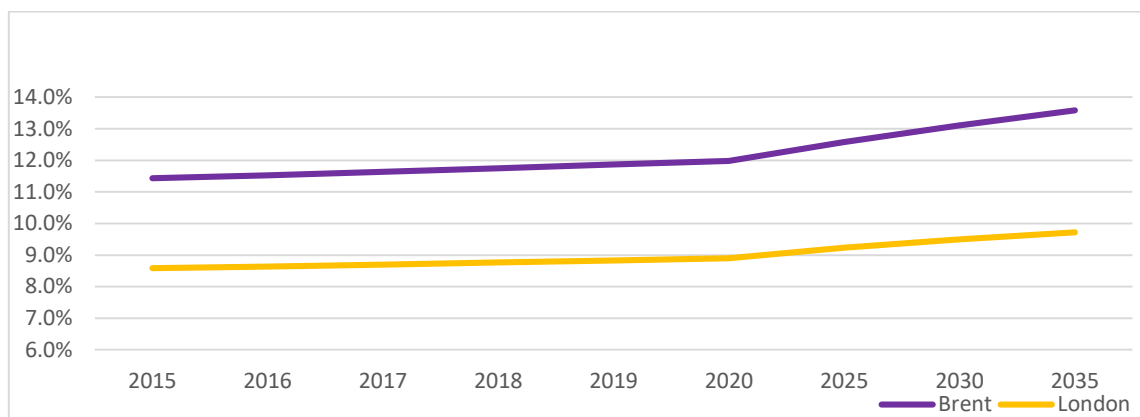
⁵¹⁹ JSNA 2015 Brent Overview Report

⁵²⁰ Healthy Schools London Website, Brent

complications, such as amputation, kidney failure and strokes. Diabetes causes 24,000 people in the UK to die early each year and is also the leading cause of blindness in people of working age⁵²¹.

Brent's diabetes estimated prevalence was 11.8% in 2017, higher than the London prevalence estimated prevalence of 8.7%⁵²². The real number is assumed to be higher due to unreported cases⁵²³. Moreover, the mix of an ageing population, high number of obese residents, as well as a high number of people who are more likely to be affected due to their ethnic background, is predicted to cause an even higher prevalence of diabetes in the future ⁵²⁴.

Figure 250: Diabetes Prevalence



Source: Public Health England: National Cardiovascular Intelligence Network 2016

Mental Health

Mental health remains the single largest cause of morbidity within Brent, affecting one quarter of all adults at some time in their lives. ⁵²⁵ In Brent, one out of 5 people reported high anxiety levels in 2013/14⁵²⁶. 10.9% of respondents to 2016/17 Brent GP patient survey reported having some form of depression or anxiety, lower than the level for London and for England⁵²⁷. Social isolation can also have negative effects on mental health. There were more than 30,000 single-person households in the 2011 census, out of which 29% were aged 65 and older⁵²⁸. In Brent in 2017/18, only 39% of adult social care users reported that they have as much social interaction as they would like, lower than the rate for London and England and 7th lowest out of the 33 London Boroughs. Brent also has a higher than average level of prevalence of severe mental illnesses, with just over 1%⁵²⁹. One in eight (12.8%) children and young people aged between five and 19 had a mental disorder in England in 2017⁵³⁰.

⁵²¹ The Cost Of Diabetes: Report

⁵²² National Cardiovascular Intelligence Network 2016

⁵²³ Annual report of the director of public health for Brent 2014

⁵²⁴ Ibid.

⁵²⁵ Brent Health and wellbeing Strategy 2014-2017

⁵²⁶ Annual report of the director of public health for Brent 2014

⁵²⁷ Public Health Profiles 2019 <https://fingertips.phe.org.uk/profile-group/mental-health/profile/common-mental-disorders/data#page/3/gid/1938132720/pat/46/par/E39000018/ati/165/are/E38000020/iid/90647/age/168/sex/4>

⁵²⁸ JSNA 2015 Brent Overview Report

⁵²⁹ Annual report of the director of public health for Brent 2014

⁵³⁰ <https://digital.nhs.uk/data-and-information/publications/statistical/mental-health-of-children-and-young-people-in-england/2017/2017>

Dementia

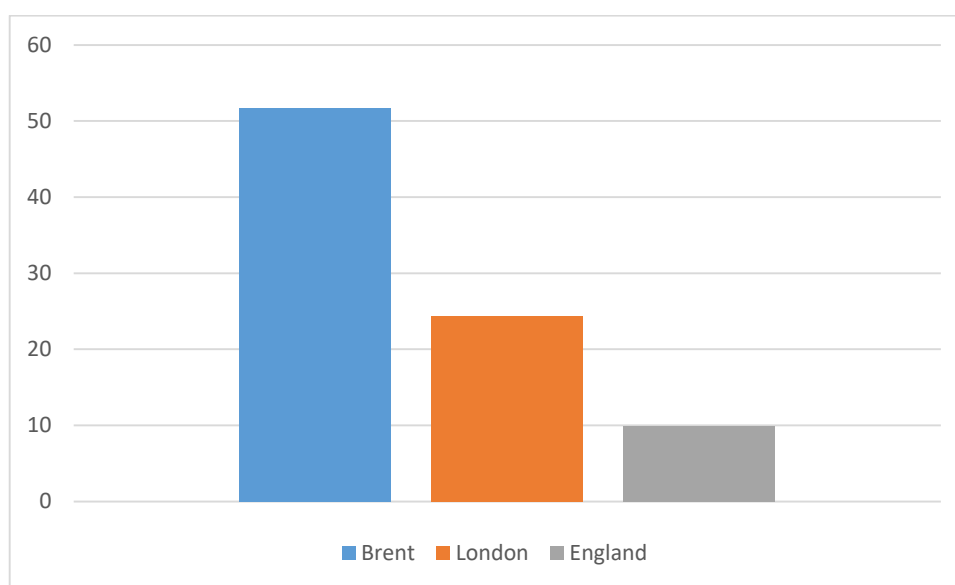
The recorded prevalence of dementia in people aged 65 years and over in December 2018 was 4.65%, higher than the England average of 4.33% and the London average of 4.5%⁵³¹. Brent Council has committed to becoming a dementia friendly borough by 2020. Brent Council, NHS Brent CCG and Community Action Dementia Brent (amongst other partners) have committed to the pledge and are developing a five-year dementia strategy focusing on prevention, diagnosing and living well, caring and dying well, carers and training⁵³².

There are eight dementia cafes in Brent that offer a social environment for people with dementia and their carers to discuss memory loss and the impact that this has on their lives.

Other Illnesses

Other health issues at the moment include one of the poorest oral health records among children in London. There is a high prevalence of tuberculosis (TB) per 100,000 in Brent (51.7), compared to levels across London (24.3) and England (9.9)⁵³³. However, there has a downward trend in the prevalence of TB in Brent particularly since 2009-11.

Figure 251: TB Incidence per 100,000 2015-17



Source: Public Health England: TB Strategy Monitoring Indicators

Brent also has a higher than average rate of new STI (sexually transmitted infections) diagnoses per 100,000⁵³⁴.

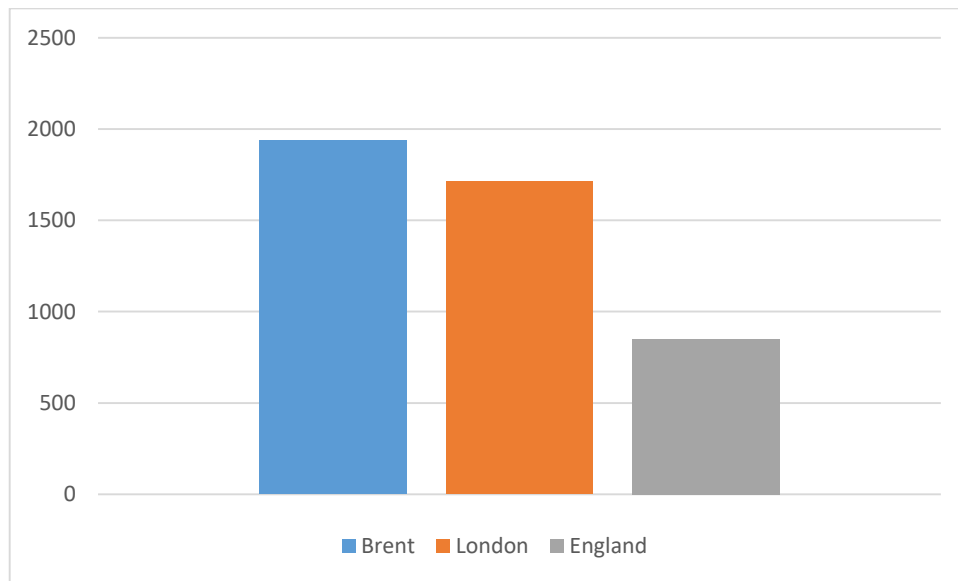
⁵³¹ Public Health Profiles 2019 Accessed: <https://fingertips.phe.org.uk/profile-group/mental-health/profile/dementia/data#page/3/gid/1938133052/pat/6/par/E12000007/ati/102/are/E09000005/iid/91891/age/27/sex/4>

⁵³² Community Action on Dementia. Accessed: <https://cad-brent.org.uk/brent-2020/>

⁵³³ PHE TB Strategy Monitoring Indicators Accessed 2019: <https://fingertips.phe.org.uk/profile/tb-monitoring/data#page/4/gid/1938132814/pat/104/par/E45000001/ati/102/are/E09000005>

⁵³⁴ Public Health Profile 2019 Accessed: <https://fingertips.phe.org.uk/profile/SEXUALHEALTH/data#page/3/gid/8000057/pat/6/par/E12000007/ati/102/are/E09000005/iid/91306/age/182/sex/4>

Figure 252: Number of New STI Diagnoses (excl. chlamydia) > 25 Per 100,000



Source: Public Health England Sexual and Reproductive Health Profiles 2015-17

Wider Determinants of Health

Often the social determinants of health are largely outside the scope of those who deliver healthcare, with risks driven by individual behaviour (smoking, diet, exercise) in the context of societal influences (housing, schools, employment) and environmental factors (air quality, physical environment).

Health and Environment

In Brent, graffiti, fly-posting, fly-tipping, litter, dog fouling and waste burning are activities related with enviro-crime. Tackling Environmental ASB in the borough is important due to its negative impact on the environment and because the quality of the local environment contribute to people's satisfaction with the conditions within which they live⁵³⁵.

It is essential to be aware of the impact of the living environment, as this has serious human health and social impacts. Some definitions link it to other types of serious crime related with Anti-Social Behaviour (ASB). Scores for wellbeing in the borough in 2011-14 ranked were similar to the national level. Values for life satisfaction (Brent: 7.3 out of 10; England: 7.5), were reported on a scale from 0 to 10.

Air Quality

Brent meets all national air quality targets except for two pollutants - Nitrogen Dioxide (NO₂) and Particulate Matter (PM₁₀)⁵³⁶. Loss of life expectancy for women due to exposure to NO₂ is 15.5 months and 17 months for men⁵³⁷.

⁵³⁵ Brent (2017) Illegal rubbish dumping

⁵³⁶ LBB Air Quality Action Plan 2017-2022

⁵³⁷ Understanding the Health Impacts of Air Pollution in London Kings 2015

Air quality in Brent has been improving but for the future the council will need to take action if we are to meet national targets set for NO₂. In addition, there is no threshold below which there are no ill health effects from pollutants and Local Authorities are required to take steps to reduce these emissions where possible⁵³⁸.

Some areas of the Borough are more likely to be affected by poor air quality than others as the wider problems of poverty; deprivation and general poor health make some people more vulnerable to the effects of pollution than others.

In Brent, there were 207 emergency admissions of children for asthma in 2013/14, which equates to 271.5 per 100,000 and exceeds the national average rate⁵³⁹. In 2017/18 there were 205 (per 100,000) hospital admissions for asthma for under 19 year olds⁵⁴⁰. Exposure to air pollution has a range of impacts on health. Short term exposure mainly affects people who are already classed as 'vulnerable'. It can exacerbate asthma, affect lung function and lead to an increase in hospital admissions for people with respiratory and cardio-vascular conditions⁵⁴¹.

The costs of air pollution include: resource costs i.e. medical treatment costs; opportunity costs, in terms of lost productivity; and dis-utility i.e. pain or suffering, concern and inconvenience to family and others. In the UK, exposure to particulates and nitrogen dioxide is linked to around 40,000 early deaths each year, and costs to individuals and society add up to more than £20 billion every year⁵⁴². In 2019 the Department for Environment, Food and Rural Affairs published the Clean Air Strategy 2019. The strategy sets out the government's aim to reduce particulate matter emissions by 30% by 2020, and by 46% by 2030⁵⁴³. The Strategy outlines the responsibilities of Local Government including the role partnership working with neighbour authorities.

Transport

In 2016/17, 0.3% of residents used cycling for travel and 25.3% walked for travel at least 5 times a week. In comparison, 0.7% of residents cycled for leisure and 5.3% walked for leisure at least 5 times a week⁵⁴⁴. Encouraging the use of green modes of transport such as Walking and Cycling is one of the Mayor's strategies to improve air quality and deliver health benefits. Brent Cycling Strategy indicates that the most significant barrier to cycling is road safety, followed by the cycling environment, and the need to develop a network of quiet, on-road, routes avoiding major links, to encourage cycling and reduce concerns over road safety⁵⁴⁵. The accident statistics for Brent shows that 1,067 people in Brent were injured as a consequence of road traffic accidents in 2014. Out of these, 83 were serious injuries and there were 2 deaths. Despite a significant reduction in the last 13 years, injuries from road traffic accidents in the borough still exceed the London average.

⁵³⁸ Ibid

⁵³⁹ Future drivers of the health of Londoners

⁵⁴⁰ Public Health Profile 2019 Accessed:

<https://fingertips.phe.org.uk/search/asthma%20admission#page/4/gid/1/pat/6/par/E1200007/ati/102/are/E0900005/iid/90810/age/220/sex/4>

⁵⁴¹ City of London Air Quality Strategy 2015-2020

⁵⁴² Every Breath We Take: The Life long Impact of air pollution February 2016

⁵⁴³ Department for Environment, Food and Rural Affairs (2019) Clean Air Strategy 2019

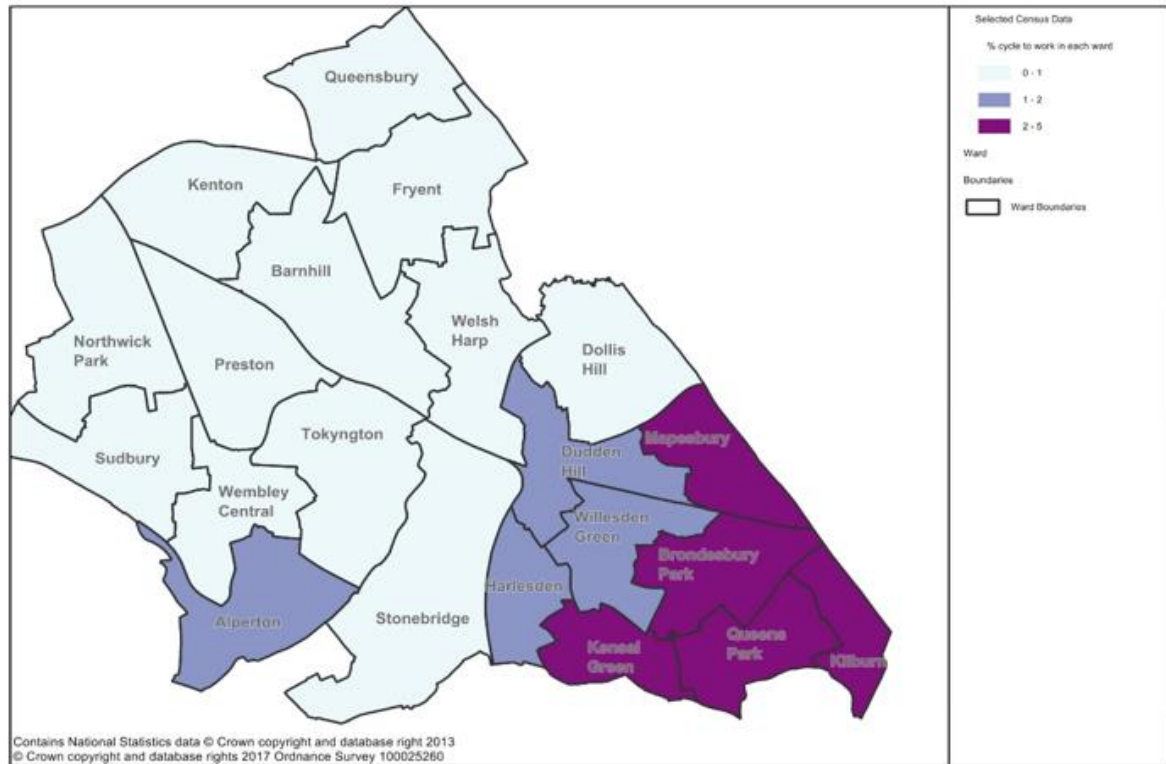
⁵⁴⁴ Walking and cycling statistics, England: 2017, Table CW0302 & CW0303 Accessed:

<https://www.gov.uk/government/statistics/walking-and-cycling-statistics-england-2017>

⁵⁴⁵ Brent Cycling Strategy 2016-2021

Pavements and footpaths are also essential for all to allow access to local places. With Brent's growing population, an increase in walking is essential to ensure other transport networks continue to function efficiently, as well as delivering public health improvements for Brent residents.⁵⁴⁶ Encouraging active travel (i.e. walking or cycling) which is attributed to healthier lifestyles and reduced risks of certain illnesses.

Figure 253: People in Brent regularly cycling to work



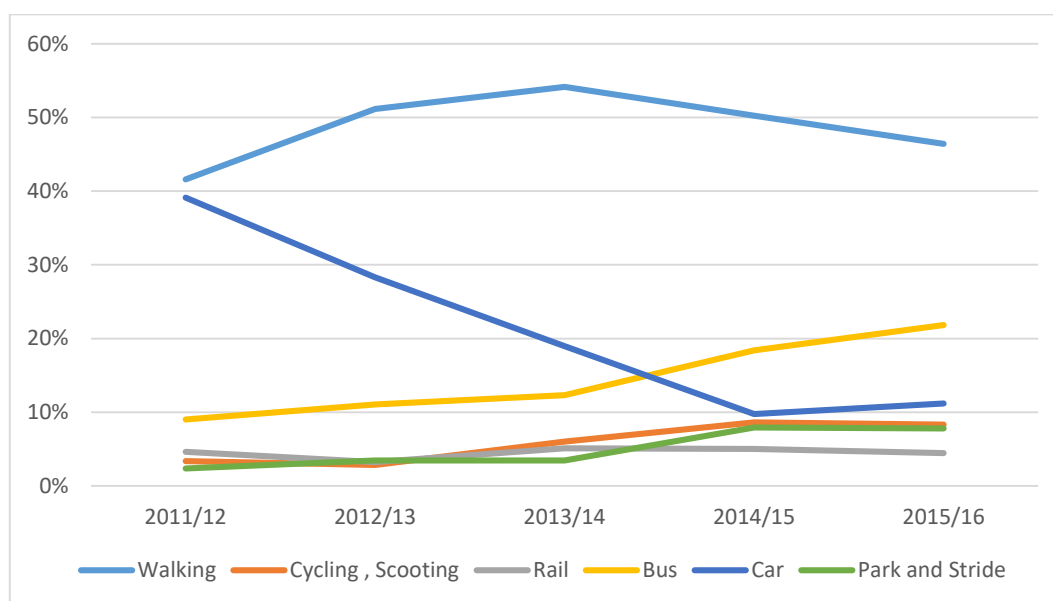
Source: Brent Council GIS Mapping Service

The above map shows the percentage of people cycling to work on a ward level. Cycling to work is much higher in the south of the borough, in comparison in the north of the borough, where only between 0-1% cycle to work.

About half of Brent pupils regularly walk to school and the number of those cycling has increased in past years. Most people in Brent live within 1,500m from a primary school. Especially for young children, it is important that they regularly undertake physical activity, and walking to school is a good start.

⁵⁴⁶ Brent Walking Strategy 2017-2022

Figure 254: How pupils in Brent travel to school



Data Source: Brent Council School Travel Plan data (internally available)

Green Space

Green space and natural environments can provide a range of health benefits to the local population. Green spaces and infrastructure improve both mental and physical health and have been shown to reduce health inequalities. Between March 2013 and February 2014, 15.8% of people in Brent aged 16 years and over utilised outdoor space for either exercise or health reasons. This is lower than the England average, 17.1%⁵⁴⁷. More than half of Brent households live further away from the nearest green space of more than 2 hectares than the maximum recommended distance of 400m in the London Plan⁵⁴⁸.

This information is vital to understanding inclusive urban growth, and associated health and economic issues related to the environment in Brent. Improved quality and quantity of green space may additionally have spill-over effects on other areas of environmental significance, such as air pollution. For example, the presence of more street trees will assist in slowing traffic, providing shade on pavements during hot weather, and contribute to mitigating air pollution⁵⁴⁹. Trees form an integral part of the urban environment and provide a range of benefits, not limited to improving the general amenity of an area, and positively impacting the local environment. Improving access to and the quality of green space in the borough, as well as providing new green spaces through regeneration schemes and in new developments, will also contribute more generally to the Councils' commitment for improving health and wellbeing and tackling health inequalities.

Health Inequalities

Health inequalities are differences in people's health across the population and between specific population groups. They are socially determined by circumstances largely beyond an individual's control. This section will look at some of the causes of health inequalities⁵⁵⁰.

⁵⁴⁷ JSNA 2015 Brent Overview Report

⁵⁴⁸ GLA (2017) Tree planting grants 2016-17

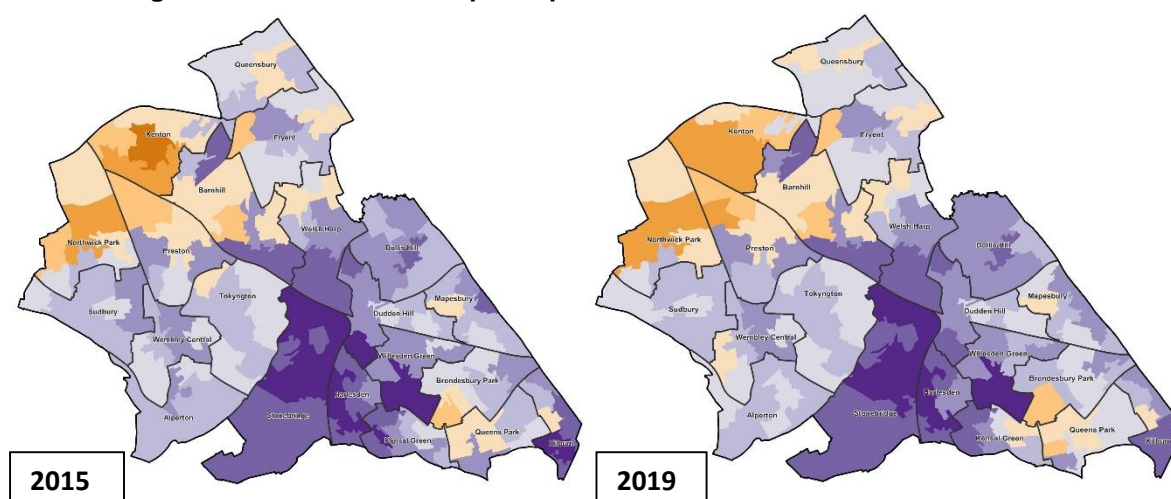
⁵⁴⁹ Brent Walking Strategy 2017-2022

⁵⁵⁰ NHS Health Scotland What are Health Inequalities

Deprivation

There is a strong correlation between deprivation and health in Brent. This is best illustrated by an almost 9-year difference in life expectancy between the most affluent and least affluent wards in the Borough. High levels of deprivation are also associated with low economic activity, high levels of unemployment, unhealthy lifestyles, low life expectancy, poor educational attainment and poor quality housing.⁵⁵¹

Figure 255: Indices of Multiple Deprivation Scores for Brent in 2015 and 2019

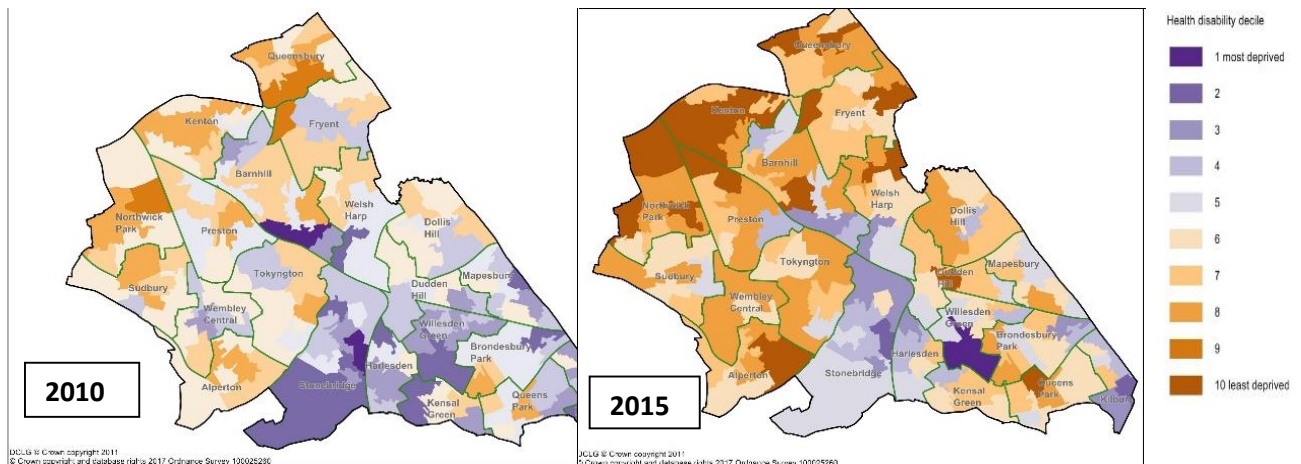


Source: Brent Council GIS Mapping Service

The Indices of Multiple Deprivation (IMD) show that deprivation levels in Brent have become less polarised between 2010 and 2019. From 2010 to 2015, whilst there were reductions in areas with concentrations of both very high and very low levels of deprivation, overall deprivation increased across the borough; however, from 2015 to 2019 deprivation levels have remained largely similar, with some LSOAs becoming relatively less deprived than 4 years ago. In addition, Brent ranked the 49th most deprived local authority in England in 2019, which improved upon the 39th ranking in 2015. Despite decreases in deprivation, Brent saw a comparatively smaller decline than other London borough's – with only a 3% point reduction compared to Tower Hamlets which saw a 22% reduction.

⁵⁵¹ JSNA 2015 Brent Overview Report

Figure 256: Health disability deprivation scores in Brent in 2010 and 2015



Source: Brent Council GIS Mapping Service

When looking at the 'health disability' indicator for the national IMD, it appears that health deprivation has reduced across the borough between 2010 and 2015.

Fuel Poverty

Fuel poverty (the inability to adequately heat a home) is caused by both low incomes and high costs due to energy inefficient properties. In 2015, 13.4% of London's population was fuel poor. Fuel poverty is more common amongst ethnic minority groups with 16.4% living in fuel poverty in comparison of 10.4% of the white population in the UK. 37.6% of all fuel-poor households are in the private rental sector. In 2017, it was estimated 14.9% of Brent's households experienced fuel poverty, higher than London at 11.8% and England at 10.9%⁵⁵².

The health impacts of fuel poverty for children include weight gain, high hospital admission rates, lower developmental status, and the severity and frequency of asthmatic symptoms. For older people it is associated with higher mortality rates and has a negative impact on physical health. For all age groups fuel poverty negatively impact mental health⁵⁵³.

Housing

Brent has for many years had one of the largest number of people living in temporary accommodation in the country for many years. In 2019, Brent Council reported 2,191 households in Temporary Accommodation, a total reduction of around 50.8% since 2004. In the 10-year period between the 2001 and 2011 Census, household overcrowding increased substantially. In Brent, there was an increase of 8,745 overcrowded homes, from 23,943 to 32,688 homes, around 6%⁵⁵⁴. In 2010, Brent 12.1% of households were overcrowded, which was the third highest level amongst London boroughs, and much higher than the London-wide overcrowding level which was 7.5%⁵⁵⁵. Mental health issues such as anxiety and depression have also been linked to overcrowded and unsuitable housing.

⁵⁵² Department for Business, Energy and Industrial Strategy (2019) Fuel Poverty Statistics Sub-regional poverty data. Accessed: <https://www.gov.uk/government/statistics/sub-regional-fuel-poverty-data-2019>

⁵⁵³ The Health Impacts of Cold Homes and Fuel Poverty

⁵⁵⁴ Brent Council (2013) *Brent 2011 Census Profile*, London: Brent Council

Employment

Employment plays an important role in supporting individual's mental health. Economic activity is at 72.5% in Brent compared to 78.1% in London. The lowest rates are amongst the Black population (58.3%) followed by Pakistanis/Bangladeshis (63.5%). The Indian population has rates just below the white population at 74.6% compared to 76.6%⁵⁵⁶. In addition, female economic activity in Brent has consistently been lower than the UK average it was at 65.1% in 2016. This is the 3rd lowest rate in London behind Newham and Tower Hamlets. Good quality work was associated with an improvement in mental health scores compared to remaining unemployed⁵⁵⁷.

Health and Social Care Systems

Alongside the health of residents, it is also relevant to examine the level, types and delivery of health provision in Brent.

Health as an economic sector is the second biggest in Brent after Wholesale and Retail. In 2016, 18,000 people were working in the Health and Social activities sector. This accounts for 15% of employment in Brent which is higher than the London (9.8%) and UK (13.3%) averages⁵⁵⁸. Currently there are 51 GP practices in Brent, who work together in groups across the borough⁵⁵⁹. London North West University Healthcare NHS trust, which includes Central Middlesex, Ealing Hospital and Northwick Park and St Marks hospitals employs 9,500 staff⁵⁶⁰.

The maps below show the distribution of health employers across the borough.

⁵⁵⁶ Annual Population Survey 2017

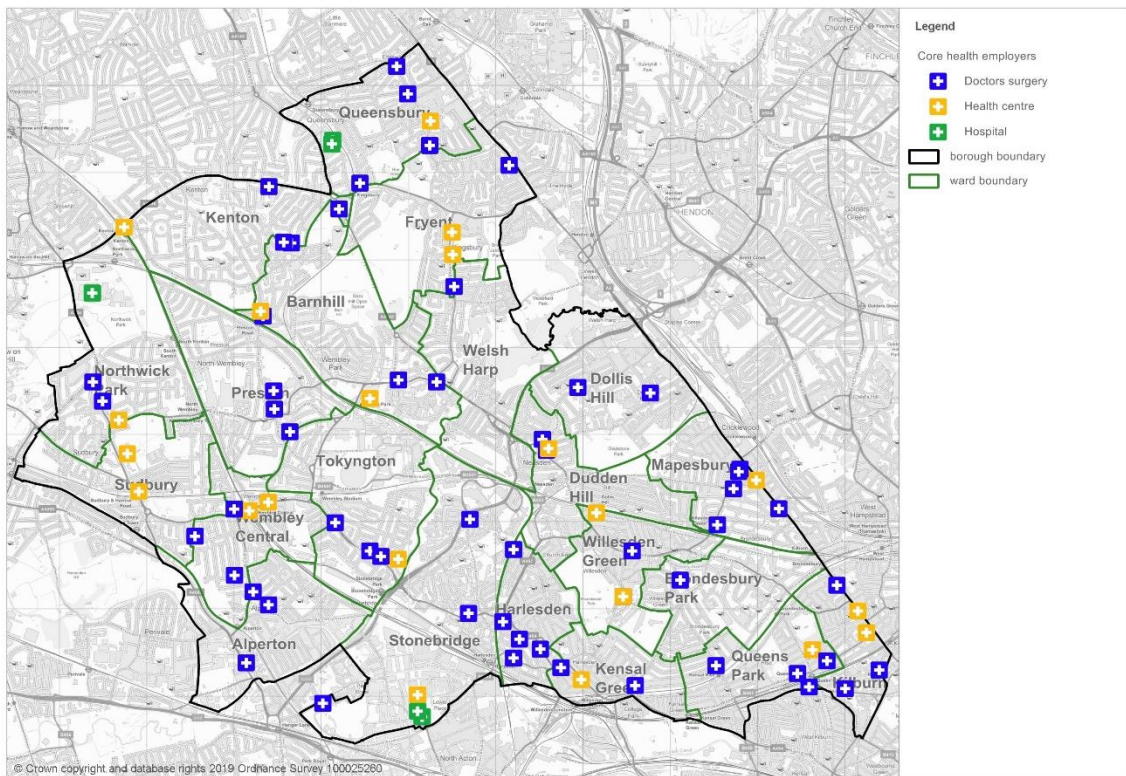
⁵⁵⁷ Having a bad job can be worse for your health than being unemployed Manchester 2017

⁵⁵⁸ Nomis, Official Labour Market Statistics, Labour Market Profile - Brent

⁵⁵⁹ Brent CCG Annual Report and Accounts 2017/18

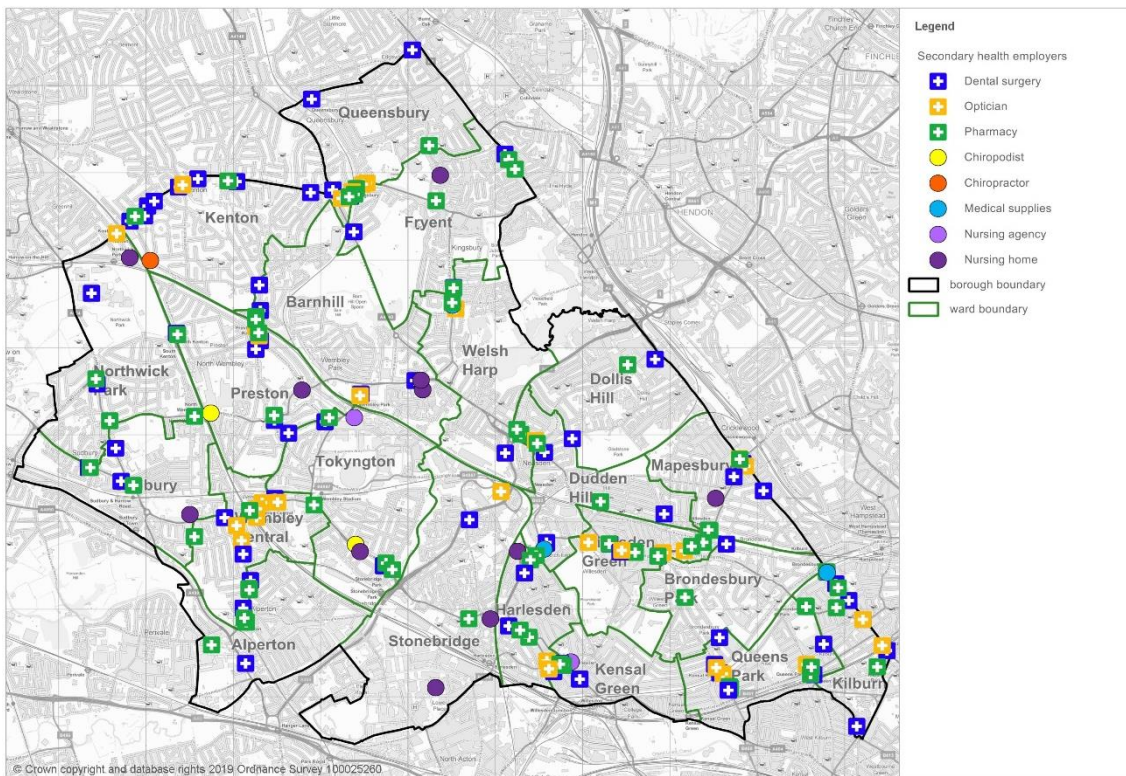
⁵⁶⁰ London North West Healthcare Annual Report 2016/17

Figure 257: Core Health Employers



Source: GIS Mapping Brent Council

Figure 258: Secondary Health Employers



Source: GIS Mapping Brent Council

There is evidence that Brent has issues with recruitment and retention of GPs and district nurses⁵⁶¹. This mirrors trends in London that show the health sector has low retention and high vacancy rates, and an ageing workforce in some professions. London has a higher proportion of GPs aged 60 and over, in school nursing, district nursing and health visiting, a significant proportion of the workforce are in their 50s. Vacancies in London in nursing and social care are higher than the national average, as is staff turnover in the NHS more broadly. This is partly due to the high cost of living and no clear policies to attract key workers⁵⁶².

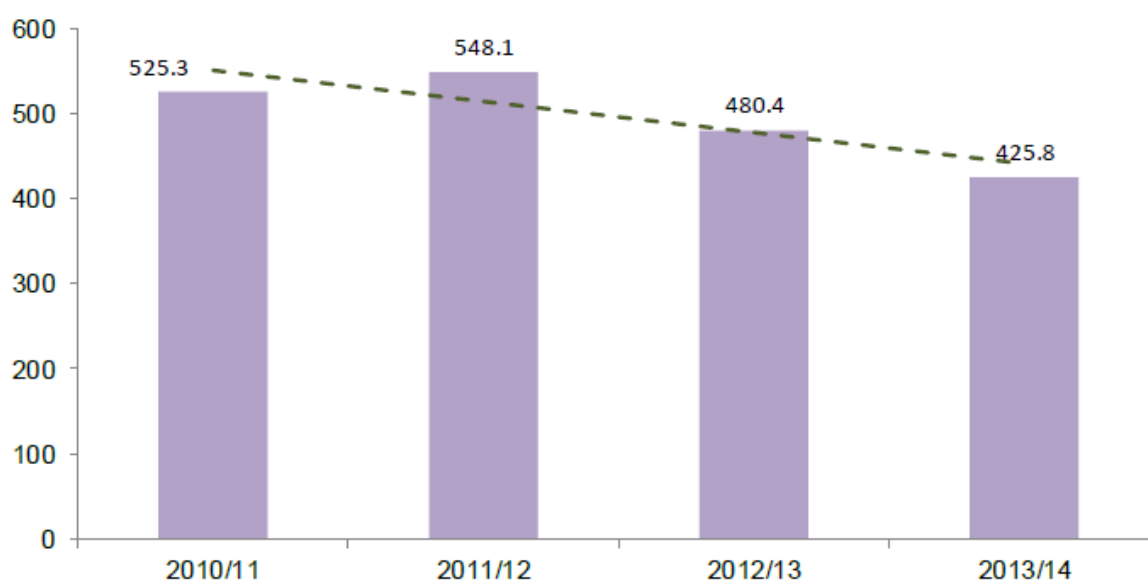
Brent possesses a strong drug and alcohol and treatment and recovery sector, which is in the top quartile nationally with 40% of alcohol treatments being completed successfully.⁵⁶³ Central Middlesex hospital is currently being transformed into a 21st century centre of excellence⁵⁶⁴. The ongoing financial pressures faced the NHS in the years ahead will in all likelihood have an impact in Brent.

It is important to note that funding across the NHS has changed since the introduction of the Health and Social Care Act 2012. Following this Clinical Commissioning Groups (CCGs) were created. The total CCG budget is allocated to each individual CCG according to a nationally agreed formula that is intended to reflect the care needs of each local population. The allocation varies significantly from one part of London to another. The funding in NHS Brent CCG in 2017/18 was £415.4m and in 2018/19 the allocation is £427.5m.⁵⁶⁵ Each year Brent CCG sets out priorities and outcomes of the year and services it wants to commission. Further detail on CCGs in the trends section.

Adult Social Care

Adult Social Care is going to remain a key issue going forward. Formal Adult Social Care in Brent consists of the Council commissioning private providers of home care supported living. Another option is constituted through 'floating support,' which enables people with just a few care needs to remain living on their own.

Figure 259: Rate of residential / nursing care home permanent admissions



⁵⁶¹ Access to extended GP services and primary care in Brent 2015

⁵⁶² Better Health for London 2014

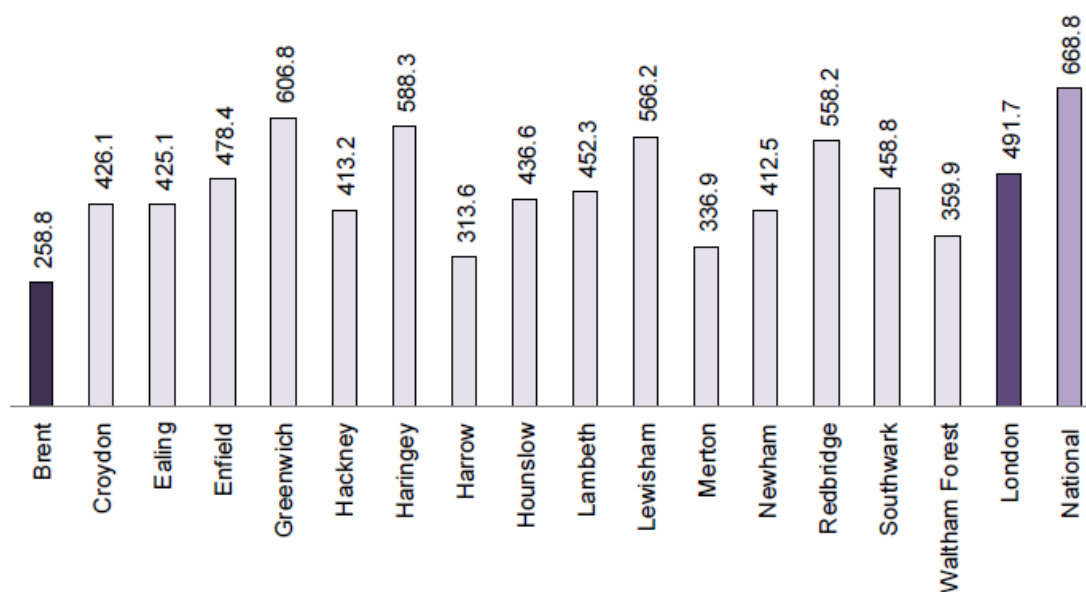
⁵⁶³ Annual report of the director of public health for Brent 2014

⁵⁶⁴ Brent and Healthcare plan

⁵⁶⁵ NHS CCG website <https://www.england.nhs.uk/publication/reviced-ccg-allocations-2018-19/>

The chart above shows the rate of permanent admissions of older people (aged 65 years and over) to residential and nursing care homes per 100,000 of the population over the period 2010-11 to 2013/14 in Brent. The rate of permanent admissions in 2013/14 was 425.8 per 100,000 people. This was below the national average rate of 625.8 per 100,000 people. In 2016/17, 714 individuals were in residential and nursing care in Brent. 120 of these were new admissions in 2016/17⁵⁶⁶.

Figure 260: London boroughs elderly people’s long-term support needs rate



The chart above shows the long-term support needs for elderly people (aged 65 and over) met by admission to residential and nursing care homes per 100,000 of the population.

NAIL Project

Brent is currently developing and rolling out its New Accommodation for Independent Living (NAIL) project, which aims to identify develop and acquire alternative forms of care to residential care for all vulnerable adult groups in Brent. There were originally 529 new units planned to be developed under the NAIL Programme, of which 387 would be delivered by external partner agencies. In 2016/17 the programme was projected to deliver cumulative savings to the Council of approximately £4.7m.⁵⁶⁷

The rationale behind NAIL is that it is preferable for elderly people to stay in their communities, rather than moving into residential care. Residential care is also very costly to the borough and the new forms of care explored in the NAIL project could be more cost-efficient, while providing for a higher quality of life, by encouraging independent living and more bespoke and personalised care packages.⁵⁶⁸ In 2017 it was estimated that NAIL would provide an average weekly saving of £332 per person, compared to accommodation provided in a care setting, and more recent operational figures indicate an average saving of £250 per person.

⁵⁶⁶ Brent Council (2018) Adult Social Care Local Account 2016/17

⁵⁶⁷ NAIL Programme Accommodation and Financial Mitigation Plan 2017

⁵⁶⁸ Update on New Accommodation for Independent Living (NAIL) project

The project uses knowledge from both Housing and Adult Social Care, with the aim of developing sustainable care plans. Whilst Adult Social Care officers have a strong understanding of the requirements of people who need accommodation and support, Housing colleagues have a stronger understanding of the regulations, processes and potential issues around building or converting accommodation, and Planning colleagues bring their expertise and input around planning processes and ensuring development is sustainable.

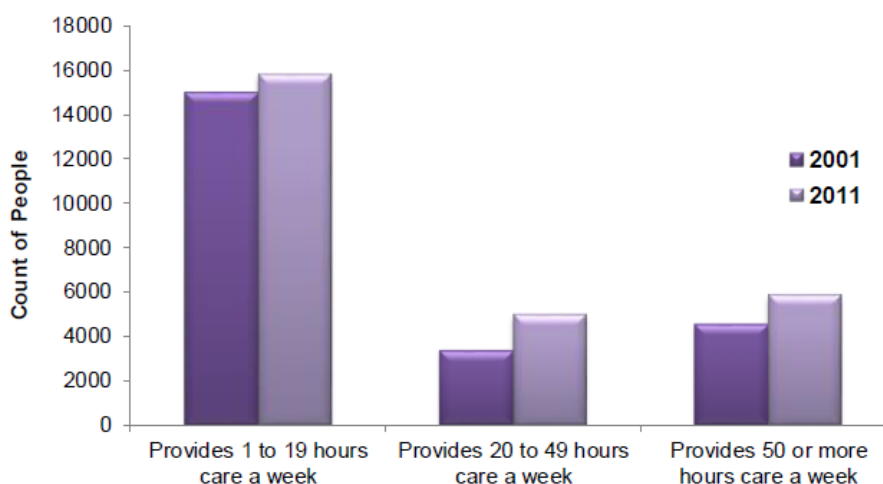
Long-term development plans are forecast to meet the NAIL Programme’s long-term targets, however an increased number of short term units are required to provide a more balanced and sustainable savings profile and meet Adult Social Care’s current accommodation requirements. To mitigate this, there was an acquisition of approximately 80 units (16 houses) and support on a number of leasing arrangements for the NAIL scheme this In March 2018.⁵⁶⁹

Informal Care

In 2011, 26,600 residents provided at least one hour per week of informal care. Overall, 8.6% of residents provided some form of informal care (Outer London: 9.2 %) ⁵⁷⁰.

Residents in Brent providing informal care for friends or family members are supported by the Brent Carers Centre through many different offers such as advice services on financial and legal issues, as well as emotional support.

Figure 261: Unpaid care Provider per week



Source: Brent Council GIS Mapping Service

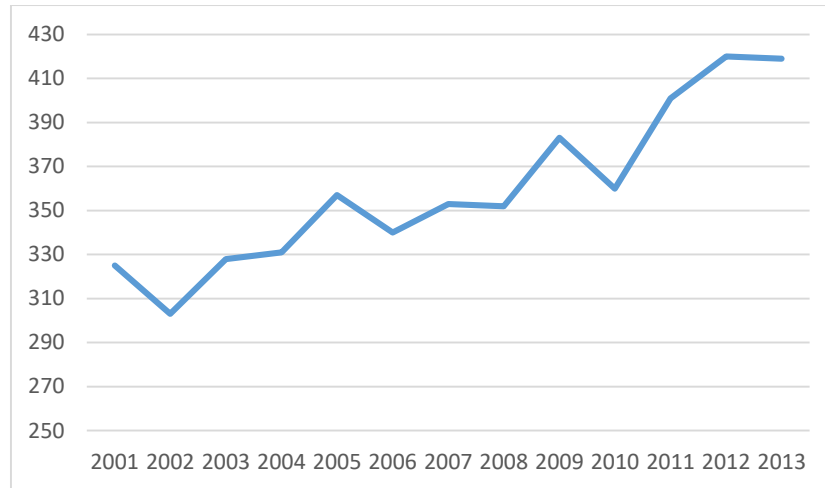
Multigenerational living could be viewed as another form of informal care. Multigenerational living is when there are three or more generations of the same family living together, or where there are two generations consisting of parents and one or more adult children. This phenomenon is mainly due to a lack of affordable family homes and has mostly been informal. However, it also is used as solution for ageing relatives needing support, as well as issues with child care. It is important to note that this was support rather than care. A study by the Cambridge Centre for Housing and Planning research showed that it did not replace other childcare arrangements or the need for carers, however, it may have reduced the need.

⁵⁶⁹ Ibid

⁵⁷⁰ JSNA 2015 Brent Overview Report

According to research conducted for *The Telegraph* by Barclays, two thirds of people surveyed believe it can be part of the solution to an ageing population. Currently, in the UK, there are a minority of people living in multigenerational homes. However, there is a growing trend since 2001.

Figure 262: UK Multigenerational Homes 2001-2013



Source: *Multigenerational living: an opportunity for UK house builders?*

Multigenerational homes are more prevalent in London and more common in ethnic minority families⁵⁷¹.

⁵⁷¹ Multigenerational living: an opportunity for UK house builders?

Trends

The following section looks at current and emerging trends relating to health. This will provide an overview of opportunities and difficulties facing Brent into the future. This section will be divided into 5 trends: ageing population, rise in obesity and diabetes, increased focus on mental health and wellbeing, increased demand on health and social care and impact of wider determinates of health.

Trend 1: Ageing Population

Brent's population is projected to grow by 17% between now and 2040, when it will nearly exceed 400,000 people. At the same time, the population will also age significantly. By 2040 28% of the over 65s, will be aged 81 plus, therefore requiring increased care provision.

Figure 263: Age range (65-80) (older)

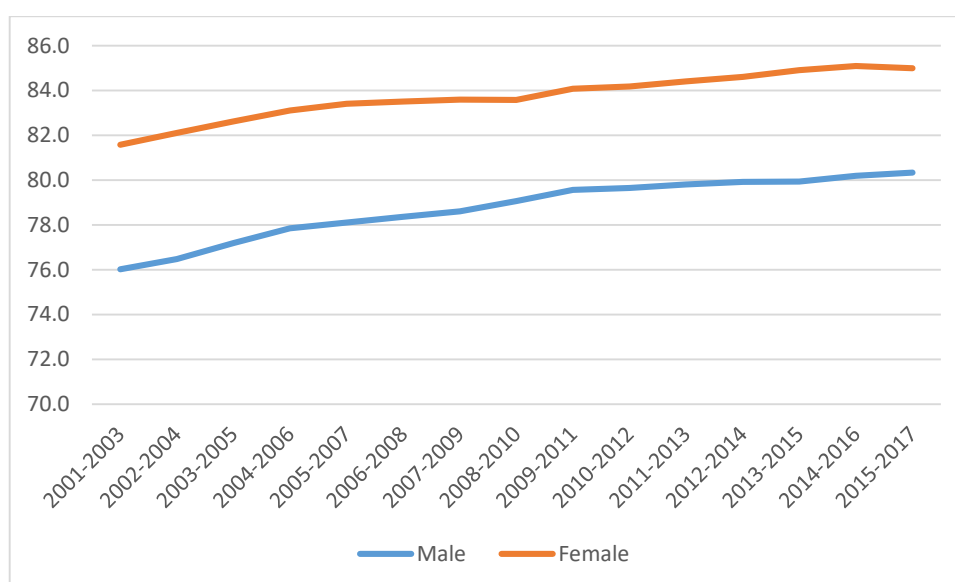
	2019	2040	2050
Brent	30,700	49,100	53,500
London	811,700	1,250,000	1,364,600

Figure 264: Age range (81+) (increased care needs)

	2019	2040	2050
Brent	9,800	18,900	24,500
London	265,900	490,200	639,800

Source: GLA Population Projections - Custom Age Tables: Housing Led Population Projection 2017

Figure 265: Life Expectancy in Brent

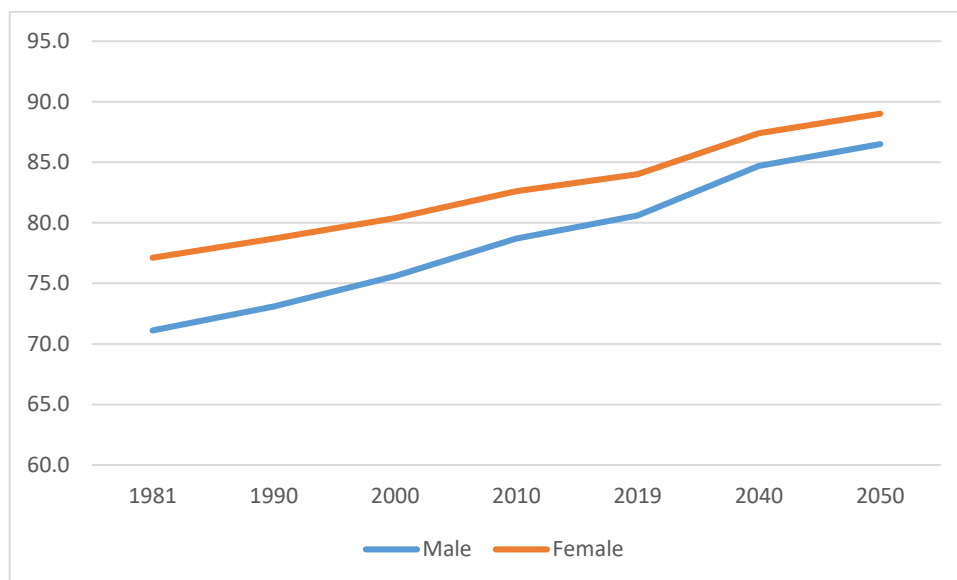


Source: ONS Life expectancies 2015-17

There has been a consistent improvement in life expectancy for the past 20 years. It is likely that this trend will continue as the amount of people living past 81 increases. Figure 266 shows

how life expectancy will increase by almost 15 years for males from 1981 to 2050 and around 13 years for females.

Figure 266: Life Expectancy projections, England



Source: Past and projected data from the period life tables, 2016-based, UK

Since 2009, data has been calculated on healthy life expectancy, the number of years of full health, fundamental to a person's quality of life and to reducing pressures on health and care provision. As this dataset is new it is hard to estimate the trends related to it. However, it is likely to be related to levels of premature death. In Brent the most prevalent cause of premature death is cancer (33%), followed by cardiovascular disease (25%). Public Health England states that the main causes of these illnesses are related to lifestyle including poor diet, smoking and alcohol consumption.

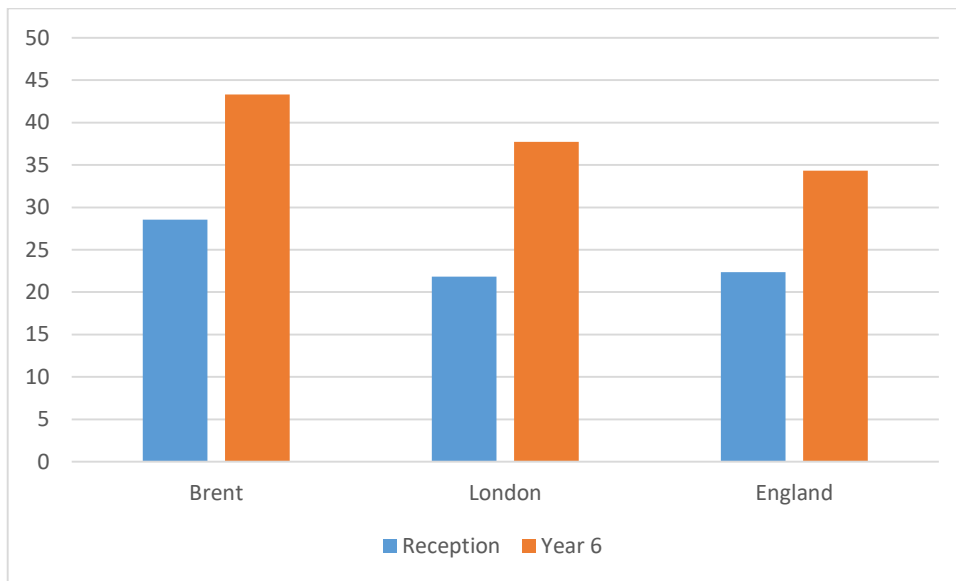
Tackling the issues relating to the wider determinants of health, as well as future developments in health research, screening and technology also have the potential to help extend the healthy life expectancy.

Trend 2: Rise in Obesity and Diabetes

Obesity

Obesity is arguably one of the most pressing issues in Brent with nearly 52% of adults being overweight or obese. Obesity is often the result of a combination of a lack of physical activity and unhealthy eating. Obesity is strongly influenced in the early years. This makes it particularly worrying to see that child obesity is at very high levels, and has been for the past years. Moreover, the rate of obese children per age segment increases between take in and year 6.

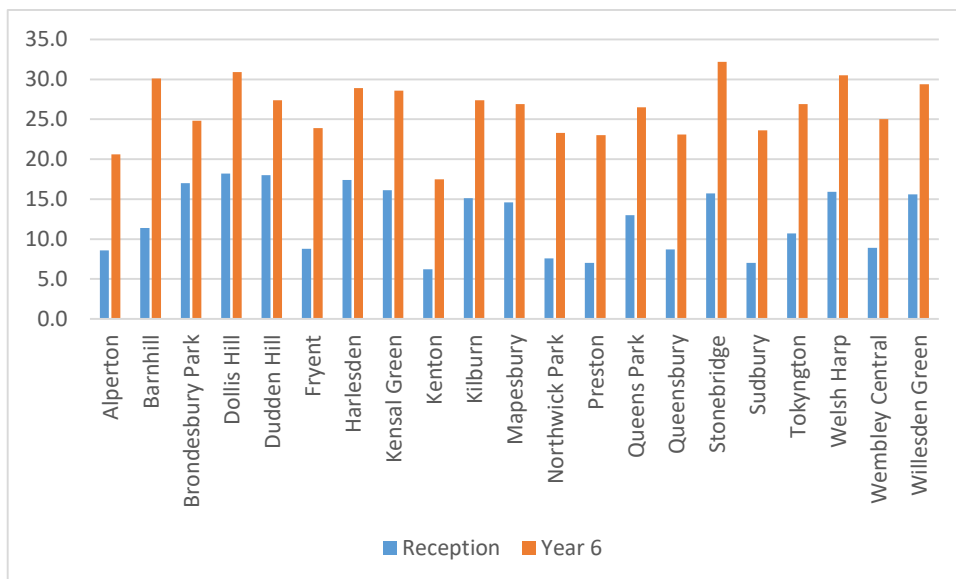
Figure 267: % Children who are overweight or obese in Year 6 compared to Reception



Source: The National Child Measurement Programme (NCMP) Local Authority Profile

Given this evidence, and the trend that obesity will continue to rise until 2040, it is essential to act on child obesity as soon as possible, as the children born now will be in the 16-24 age segment in 2040.

Figure 268: Childhood Obesity by Ward 2015/16 to 2017/18

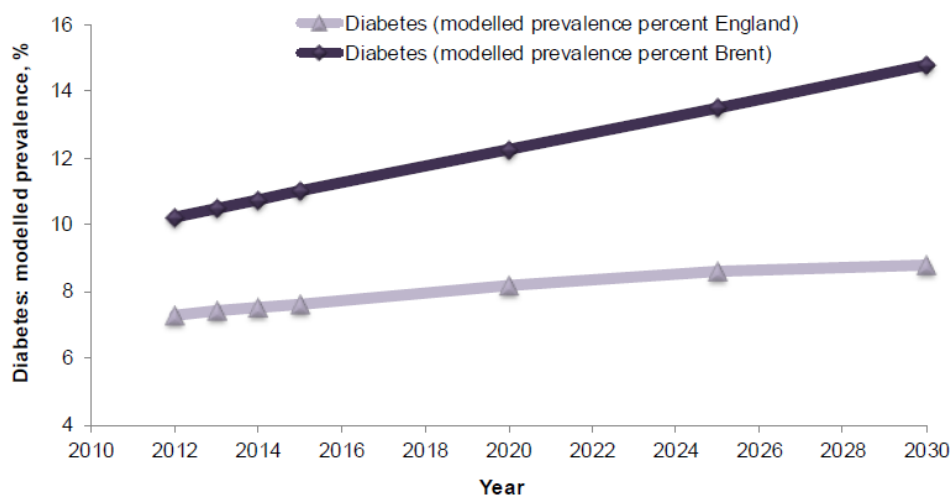


Source: Office for National Statistics

Diabetes

The mix of an ageing population, high number of obese and overweight people, as well as high number of people who are more likely to be affected due to their ethnic background, is also predicted to cause an even higher prevalence of diabetes in the future.⁵⁷²

Figure 269: Modelled estimated prevalence of diabetes 2012 - 2030



Source: JSNA 2015 Brent Overview Report

Diabetes rates in Brent were 11.6% in 2017 which is significantly higher than the London percentage of 8.7%. It is predicted to grow to 13.6% in 2035.

The Model for Local Authorities estimates that diabetes on both levels is going to increase in the future. However, the gap will widen significantly. This increase can be attributed to a mix of an ageing population, high levels of obesity, and as well as the BAME population's predisposition to the disease⁵⁷³.

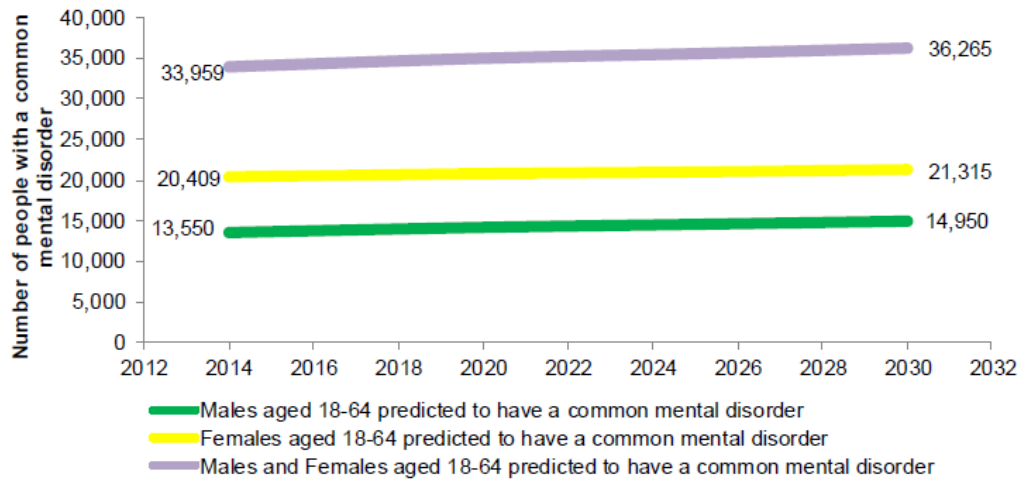
Trend 3: Increased focus on Mental Health and Wellbeing

Mental Health and Wellbeing are two areas increasingly gaining attention in health and urban planning. Brent has a high prevalence of mental illnesses, and the number of people affected is likely to grow over the coming years.

⁵⁷² Annual report of the director of public health for Brent 2014

⁵⁷³ Annual report of the director of public health for Brent 2014

Figure 270: Number of people with a common mental health disorder 2012 - 2032

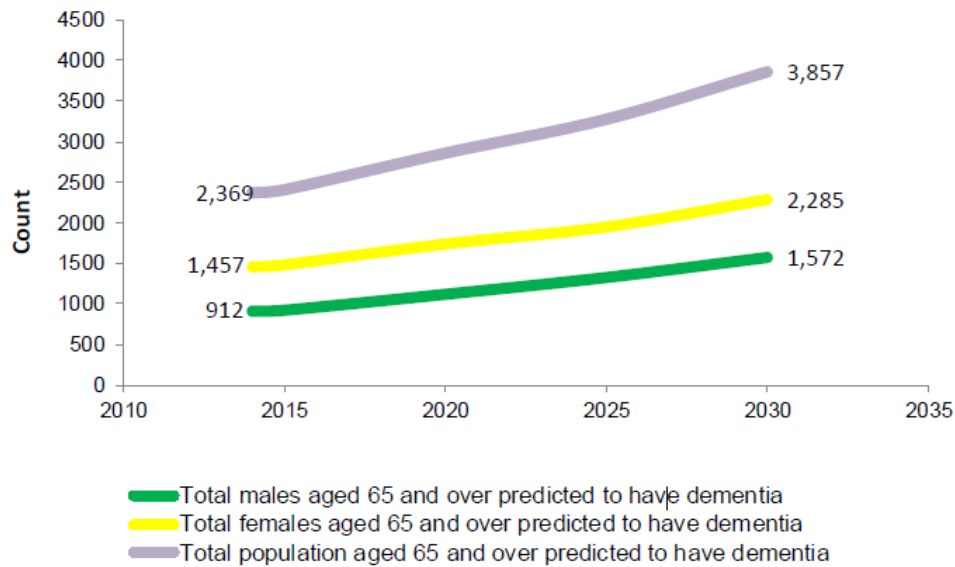


When looking at the number of people predicted to have a common mental disorder, the numbers increase marginally, which might also be attributable to the growing and ageing population. The incidence of psychotic mental disorders (i.e. schizophrenia, affective disorders with psychotic symptoms, etc.) is high compared with both other areas in the UK and in Europe, in particular among some migrant and minority ethnic groups (e.g. around five times higher in black Caribbean vs. white British populations).

Dementia

The number of people aged 65 and over predicted to have dementia is also forecast to increase significantly, with a 62% increase forecast over the period.

Figure 271: Dementia Projections 2010 - 2030



Source: JSNA 2015 Brent Overview Report

This stems from the population growth in the at risk age categories. Women are more likely to be effected by dementia than men. It is estimated that 61% of people with dementia are women and 39% are men⁵⁷⁴. This is likely to reflect the fact that women live longer than men and age is the biggest known risk factor for the condition.

While the experience of living with dementia varies from person to person, women and men have been shown to express the symptoms of dementia in different ways, indicating the possibility that male and female brains react differently to the diseases that cause it. Gender can also influence the benefits of activities that may potentially reduce the risk of dementia, such as exercise. In women, exercise has been shown to improve mortality, whereas in men the positive effect of exercise is in cognitive improvement⁵⁷⁵. Therefore, it is necessary to understand the need to vary treatment plans according to gender.

Trend 4: Increased Demand on Health and Social Care

Due to the growing and ageing population, the number of older people with higher dependency is predicted to rise by 62% between 2015 and 2035⁵⁷⁶. This trend is forecast at a time when we see growing financial pressures on the NHS and a growing mismatch between demand and funding is likely. This might lead to an increasing number of people having to provide informal care. This has lead healthcare organisations to looking to integrate health and social care. Within this approach rather than focussing on treating diseases in the healthcare system,

⁵⁷⁴ A Marginalised Majority **Alzheimer's Research UK**

⁵⁷⁵ Ibid

⁵⁷⁶ Kingston A, Comas-Herrera A, Jagger C for the MODEM project (2018). 'Forecasting the care needs of the older population in England over the next 20 years: estimates from the Population Ageing and Care Simulation (PACSim) modelling study'. *The Lancet Public Health*, vol 3, no 9, pp E447–55

more preventive measures could be taken to lower the occurrence of diseases. Also, new care models like NAIL, could be developed in new living arrangements.

The King's fund⁵⁷⁷ provides three key issues for trends in health and social care:

1. Funding pressures
2. The need for a patient centred approach
3. Increasing partnership working

Funding

Rising demand for healthcare, while funding rises more slowly than before, is creating a mismatch between demands and funding. Funding pressures are likely to continue over the next few years until at least 2021. There have also been changes in funding structures in 2012, following the Health and Social Care Act, Clinical Commissioning Groups (CCGs) were created. The responsibilities of CCGs are to assess local needs, decide priorities and strategies, and then buy services on behalf of the population from providers such as hospitals, clinics, community health bodies, etc. It is an ongoing process⁵⁷⁸.

Today, the total CCG budget is allocated to each individual CCG according to a nationally agreed formula that is intended to reflect the care needs of each local population. The allocation varies significantly from one part of London to another. There is clear pattern with inner London CCGs over-funded and outer London CCGs under-funded⁵⁷⁹.

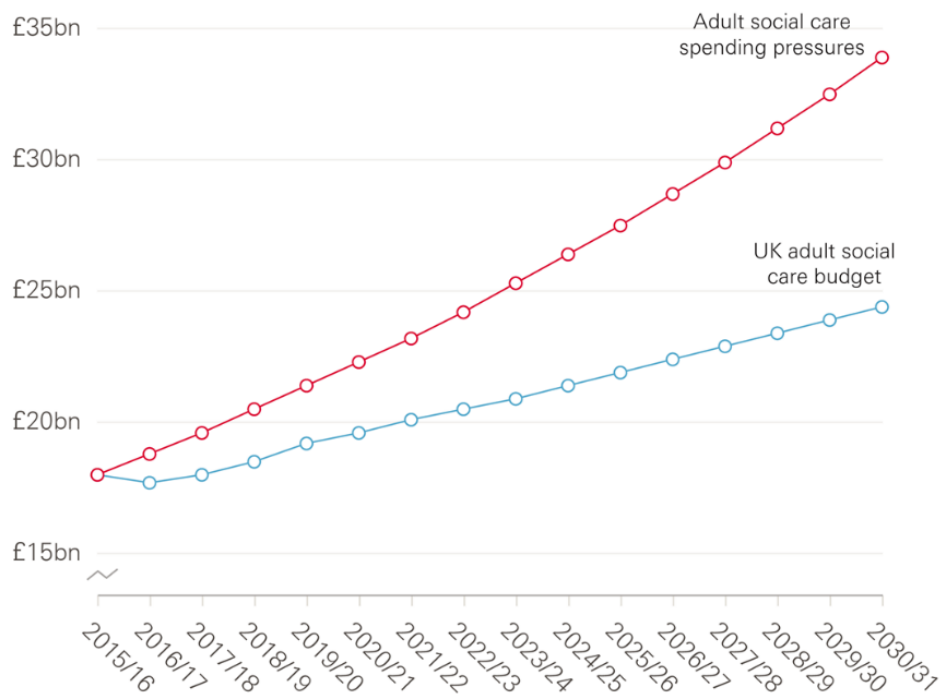
This alongside the growing demand for social care will impact NHS funding. By 2020/21 public spending on social care would need to increase by a minimum of £1.65 billion, to a total of £9.99 billion, in order to manage the impact of demographic and unit cost pressures alone. The graph below shows the gap projected.

⁵⁷⁷ King's Fund: What are the priorities for health and social care?

⁵⁷⁸ NHS CCG website

⁵⁷⁹ Better Health of London 2014

Figure 272: Social care funding gap 2015/16 – 2030/31



Source: The Health Foundation

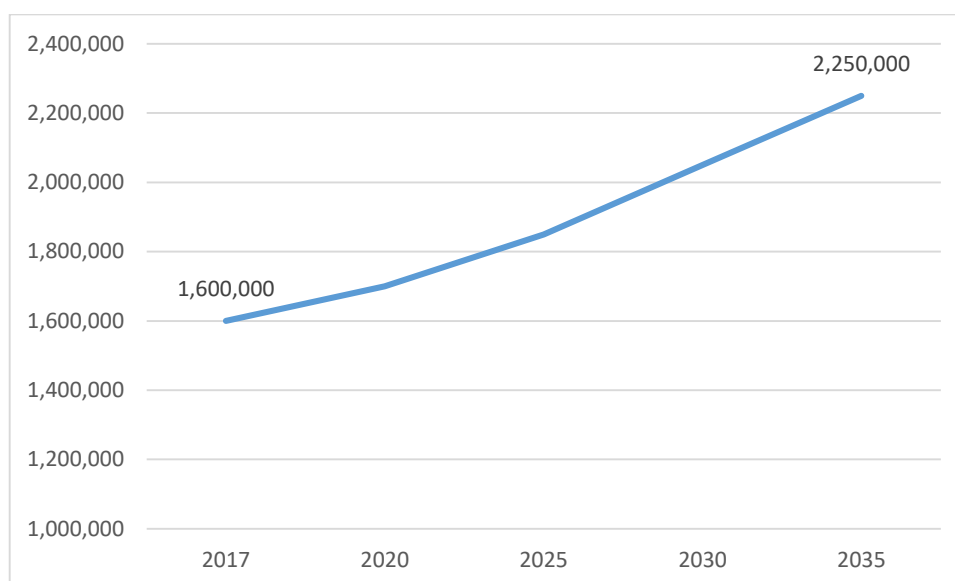
There has been an increase in the number of adult social care jobs in the sector of 21% from 2009 to 2017, however this growth rate has now slowed. There is also the issue of high vacancy levels in the adult social care sector. In 2016/17, the overall staff vacancy rate across the whole of the adult social care sector was 8% (up from 5.5% in 2012/13). Turnover rates for staff working in the adult social care sector in 2016/17 was 30.7%, an increase of 7.6% from 2012/13⁵⁸⁰. Recruitment and retention rates should be a key consideration going forward. The increase in turnover and vacancies combined with the slowed growth in the sector suggests that the sector is struggling to keep up with the demand as the population ages.

Despite this, it is estimated that based on population growth of individuals aged over 65, there may need to be 650,000 new jobs in the adult social care sector – a 40% increase (Figure 273)⁵⁸¹.

⁵⁸⁰ Skills for Care (2018) The state of the adult social care sector and workforce 2018. Accessed: <https://www.skillsforcare.org.uk/NMDS-SC-intelligence/Workforce-intelligence/publications/The-state-of-the-adult-social-care-sector-and-workforce-in-England.aspx>

⁵⁸¹ Ibid p99

Figure 273: Adult Social Care jobs forecasts between 2017 and 2035



Source: Skills for Care

Patient Centred

The ageing population, changing patterns of disease – with more people living with multiple long-term conditions – and rising public expectations mean that changes are needed to the way services are delivered. The key is to organise care around the needs of the patient by integrating primary and secondary care, physical and mental health services, and health and social care.

Patients are demanding more sophisticated, convenient, transparent, affordable and personalised service. As a result, an agile private sector has gained a strong foothold in the delivery and financing of healthcare. In a recent PwC consumer survey, almost half of respondents said they would consider having procedures like wound treatment, stitches or staples removed at a retail clinic or pharmacy.⁵⁸²

The clinician and patient should jointly create a personalised care plan which is shared with the right people at the appropriate moment. There is an increased use of technology in health by individuals which could be used by the healthcare sector. Myhealthlocker uses electronic personal health records at South London and Maudsley NHS Foundation Trust to allow patients to access their care plan online and give them control over their health information⁵⁸³.

Technology could also be used to improve efficiency and flexibility for healthcare professionals. An example of this is when district nursing staff at Whittington Health Trust, were given iPads which allowed them to do a variety of tasks on the go, therefore improving efficiency. Additionally, Managers found that their recruitment and retention figures improved since the iPads were introduced, suggesting that having access to new technology can attract and retain staff⁵⁸⁴. This is important to consider in light of issues with retention in Brent and London as a whole. As well as the potential for technology to make the healthcare provision more efficient.

⁵⁸² PwC The empowered consumer

⁵⁸³ Better Health for London 2014

⁵⁸⁴ ACAS 2017 Mind Over Machines

The use technology is already happening in some areas of Brent. Central Middlesex Hospital is pioneering the use of robotic surgery in knee replacement. Benefits of robotic surgery include: more accurate implant positioning, which can result in a more natural feeling after surgery; improved safety; reduced risk of injury to adjacent tissues and smaller incisions, which can mean a quicker recovery; shorter hospitalization; and less pain. The team at Central Middlesex has carried out more than 400 traditional knee replacements in 2017-18⁵⁸⁵. Remote consultations are another area that offers potential advantages to patients (who are spared the cost and inconvenience of travel) and the healthcare system (as they may be more cost-effective).⁵⁸⁶ A successful example is The Diabetes Appointments via Webcam (DAWN) project in Newham, East London, which demonstrated that the use of video conferencing software and computer and smartphone technology can support or even replace the traditional diabetes outpatient clinic meeting. Early results are positive, with a wide variety of improvements in patient-related factors, such as convenience, acceptability, satisfaction, a reduction in non-attendance rates and visits to Accident and Emergency⁵⁸⁷.

Improving Health and Social Care

Local government can improve the way social care, health and community services are brought together around the needs of older people. The council could play a role in creating a network of community services that will aim to support prevention of health problems through active living and social prescribing. Age UK's Integrated Care Programme has demonstrated 23% improvements in well-being for 100+ older people with complex conditions in Cornwall⁵⁸⁸.

More training should be delivered in the community. This will require Local Education and Training Boards (LETBs) to significantly increase the proportion of funding spent on training in these settings and maximise investment in ongoing staff development focusing training and development on capabilities to suit new models of care, such as generalist skills and supporting citizens to self-care.

Trend 5: Impacts of Wider Determinants of Health

Active travel

Physical activity rates have been changing differently for different age groups, but for young people (16-34 years) who still have most of their lives ahead of them, the trend has been decreasing. On the other hand, it is positive to see that physical activity rates in the 55+ segment have increased, although still only around 1 out of 8 people older than 55 is regularly active.

Cycling levels are very low, and it is one of the Mayor's key strategies to increase cycling in London. One important target is to have 70% of Londoners living within 400m of a high-quality and safe cycling route by 2041. Cycling is also supported as part of the Mayor's Healthy Streets Programme⁵⁸⁹.

⁵⁸⁵ London North West University Healthcare

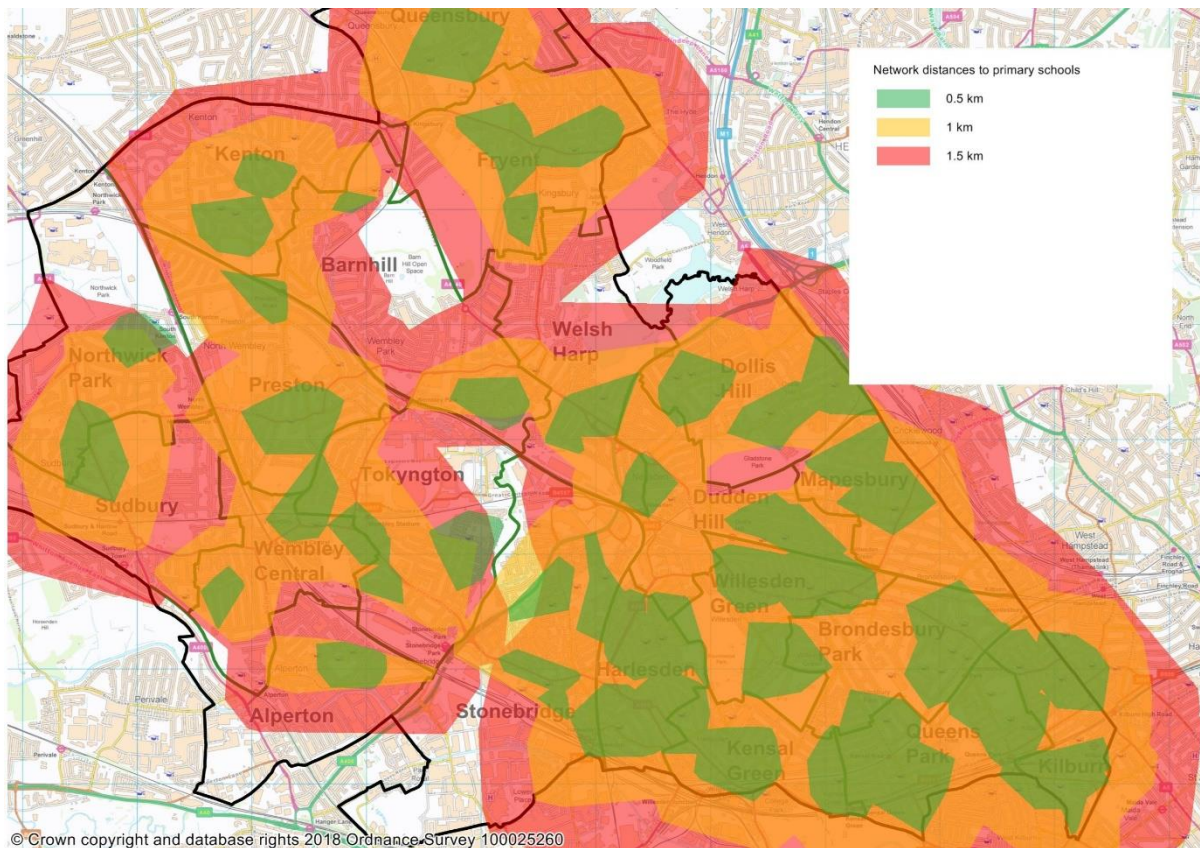
⁵⁸⁶ Virtual online consultations: advantages and limitations (VOCAL) study

⁵⁸⁷ Virtual diabetes consultations: meeting the IT governance challenge

⁵⁸⁸ Age UK Local Government's Role in Responding to an Ageing Population

⁵⁸⁹ Transport for London, Healthy Streets for London

Figure 274: Distance from Schools



Source: GIS Mapping Brent Council

The map above shows that most residential properties are within 1.5 km of a primary school.

Housing

Poor housing conditions, rising housing costs and housing insecurity all have an impact on health. Poor housing conditions are much more prevalent in rental accommodation, and 1 million people living in the Private Rented Sector (PRS) are living in poverty⁵⁹⁰. London's PRS has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025⁵⁹¹. Common problems such as damp are more prevalent in privately rented homes, and health issues associated with such problems are more likely to impact vulnerable groups, such as the young and the elderly. Rising housing costs and unaffordability, and housing insecurity, negatively impact people mental health.

Fuel Poverty

Fuel poverty is caused by a combination of factors including:

- Energy efficiency of the home.
- Fuel costs.
- Household income.

⁵⁹⁰ Future of London, Engaging London's Private Rented Sector

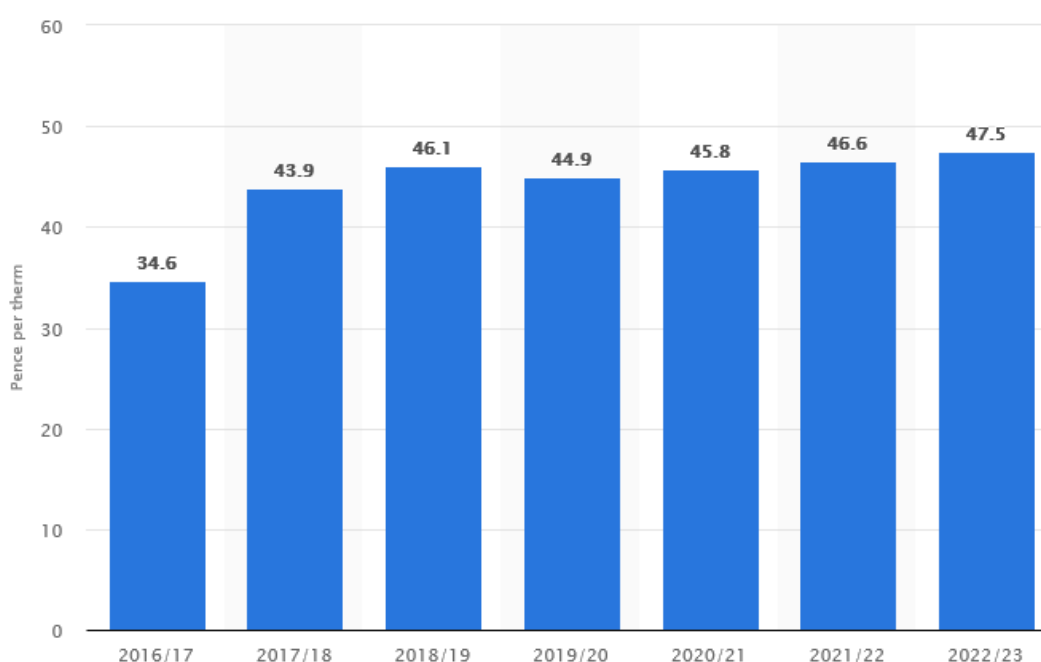
⁵⁹¹ Ibid

The consequences of fuel poverty may compound the ill health and suffering of those who are disabled or have a long-term illness. Fuel poverty is also likely to exacerbate existing problems and lengthen recovery times.

Cold homes may make it more difficult for carers to look after acutely or chronically sick people, more of whom will have to go into hospital needlessly - or go permanently into a nursing home⁵⁹².

Population projections and growth in the number of people aged over 65 years old and 80 years old, indicate a significant increase in the number of people who are vulnerable to cold weather, and fuel poverty presents the risk of increased winter deaths.

Figure 275: Gas prices 2016-2023



Source: The Statistics Portal

Figures released in March 2017, show that total household expenditure on energy in 2015 was £14.745 billion, down from £16.993 billion in 2013, however as indicated in the chart above the price of fuel is expected to rise moving forward. The price of gas is expected to rise in the coming years, and at the same time gas production levels are expected to fall. From 2016/17 to 2021/22, it is predicted that gas production will decrease by 3.3 billion therms (British Thermal Unit)⁵⁹³.

Employment

Employment plays an important role in supporting mental health. The trend in recent years of increasing levels of insecure work has been driven by globalization and technological

⁵⁹² The causes and effects of fuel poverty

⁵⁹³ Statista 2018

development, and facilitated by the concurrent deregulation of labour markets, labour market activation and the declining power of unions⁵⁹⁴.

The working environment also impacts health. Employers can take positive steps to support employee health, for example by working with employees to redesign environments and encouraging practices to make healthy choices easier. Supporting staff to become fitter, healthier and to build resilience would begin to address the high rates of sickness absence observed in recent years, and to enable staff to be at their best.

⁵⁹⁴ International Trends In Insecure Work: A Report For The Trades Union Congress

Responses

Response 1: Ageing Population

Brent will need to accommodate around 30,000 additional people aged over 65 years by 2040. Many of these people will have physical, social and health needs specific to this demographic. It will be important to pay attention to the design of the built environment to ensure affected people can easily find their way around.

Brent is characterised by diverse building typologies and variation in the scale of development. Ranging from the typical suburban streets and high streets of Outer London, to the much denser development of the 1960s South Kilburn estate, and the new mixed use regeneration clustered around Wembley Stadium. Neighbourhoods in Brent are undergoing transformational change in order to accommodate population growth. While increasing density of development is necessary to accommodate growth, careful attention must be paid to good design, infrastructure, management arrangements and place-making, to ensure denser development is sustainable. This is particularly relevant from health-related perspectives: the needs of an ageing population, physical activity and mental health and wellbeing.

Design of the built environment should consider people's physical abilities providing opportunities to and higher density of accessible bathrooms. Consideration of mental capacities need to be considered providing, easy wayfinding, clearly identifiable way points for the residents' mental maps. In terms of living arrangements, the NAIL project provides a good template and way forward. Brent's Local Plan should review policies to ensure the needs of an ageing population are given sufficient consideration both in terms of spatial planning across the borough, and in development management policies and requirements for the assessment of specific planning proposals for built development.

In the context of an ageing population, increasing demand for both adult social care and childcare, the increasing unaffordability of housing in London, work⁵⁹⁵.

Response 2: Risk of Obesity and Diabetes

Obesity

The top five items selected by Londoners that make it harder for children to lead healthy lives in their areas are:

1. Too many cheap unhealthy food and drink options (60%)
2. Too many fast food shops (44%)
3. Safety concerns about children (not letting them play outside unsupervised) (33%)
4. Too much advertising of unhealthy food and drink options (30%)
5. The cost of healthy food and drink (29%)

Many councils have taken steps to try and tackle these issues.

London Borough of Haringey for example established a 'healthy fast food restaurant'. The sugar, fat and salt content of the food is monitored and is significantly less than the high street average. Seasonal vegetables are also provided with every meal. This spring a food growing

⁵⁹⁵ Homeshare UK, the UK Network for Homeshare <https://homeshareuk.org/>

project with a local primary school will begin where herbs and salad for the restaurant will be produced at school and made with the children. The food is sold at fast food prices. For example, the restaurant offers £2 daytime 'junior specials' to young people, subsidised by evening trade with customers knowing they are supporting local young people to make positive food choices. The project was supported by £300,000 in loans and grants from the Haringey's Opportunity Investment Fund, which is run in partnership with the Mayor of London. Hundreds of individuals also made contributions totalling £55,000 through a crowd-funding website Kickstarter,⁵⁹⁶

The Tottenham Hotspur Foundation has set up a 10-week exercise programme for obese and overweight children, while Homes for Haringey, the council's housing management organisation, has reviewed all its 'no ball game' signs and started consulting with residents about taking these down along with investing in play facilities.

Across London, work has also continued to get outlets signed up to the London-wide Healthier Catering Commitment, a voluntary scheme promoted by Local Authorities to help caterers and food businesses make simple, healthy improvements to their food. This involves food businesses committing to certain standards, including frying food for shorter periods, reducing salt, using lighter mayonnaise and making salad the default option.⁵⁹⁷

Diabetes

Improvements in diabetes care have come from better treatment options, especially in relation to complications associated with the disease.

Clinical studies suggest that specialist diabetes inpatient teams can reduce prescribing errors; improve patient outcomes; reduce length of stay; increase day case rates and reduce the number of admissions. Economic modelling for NHS Diabetes suggests that the savings from introduction of these teams can substantially outweigh the cost of the team.

For example, the ThinkGlucose programme also reduces inpatient costs through better care that leads to a shorter length of stay. The programme aims to increase the awareness of diabetes in inpatients as well as staff through introducing early specialist involvement and publicising relevant guidelines to reduce prescription errors.

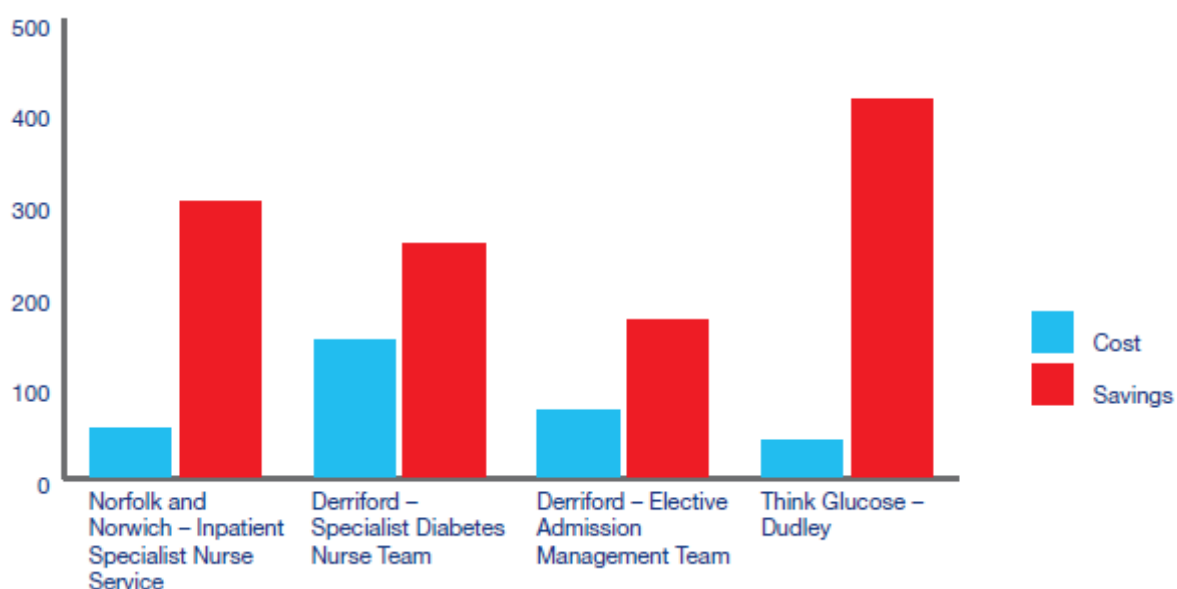
The Dudley Group of Hospitals NHS Trust report a reduction in average length of stay of 0.61 days, which was worth £411,000 to the Trust. The programme cost £38,000 to implement for staff time and programme support⁵⁹⁸.

⁵⁹⁶ Healthy weight, healthy futures Local government action to tackle childhood obesity

⁵⁹⁷ The Healthier Catering Commitment London Assembly

⁵⁹⁸ The Cost Of Diabetes 2014

Figure 276: Cost vs saving in inpatient care



Source: *The Cost of Diabetes 2014*

NICE guidance recommends an intensive lifestyle change programme for people with a high risk of Type 2 diabetes. This involves a programme of advice and support on physical activity, weight management and diet. The modelling suggests more intensive lifestyle-change programmes are more cost effective than cheaper, less intensive, programmes.

The chart below shows how specific interventions impacted diabetes care:

Figure 277: Diabetes Interventions

Intervention	Cost-effectiveness	Which organisation pays?	Which organisation saves?	Time Horizon
Specialist inpatient care	Cost-saving	Hospital	Hospital	Within a year
Footcare MDTs	Cost-saving	Hospital	Hospital and primary care	Within a year
Comprehensive footcare	Cost-saving	Primary and hospital	Whole system	Five Years
Patient education Type 1	Cost-saving	Primary care	Whole system	Breaks even after four years and then cost-saving
Patient education Type 2	Cost-effective	Primary care	Whole system	Lifetime
NHS Health Checks	Very cost-effective	Primary care	Whole system	Lifetime
Care planning in Year of Care	Cost neutral	Primary care	Whole system	Cost neutral to implement

Source: *The Cost of Diabetes 2014*

Overall, the NHS Health Check could produce a gross saving of £132 million a year over 10 years due to averted strokes, averted myocardial infarctions, prevention and early detection of Type 2 diabetes, and early detection of chronic kidney disease. These savings would grow over time as the pool of people who have had diabetes and other conditions detected and acted upon grows.

As well as specific interventions for people at high risk of developing Type 2 diabetes, Diabetes UK supports a 'whole system' approach to reducing obesity that is less about health service spending, and more about developing an environment in which it is easier to have a healthy weight.

An integrated IT system could be used so that all providers dealing with a patient have access to the most up to date data. Another approach is looking at collaborative care planning where clinicians and patients work together to agree goals, identify support needs and develop and implement action plans. These methods were proved to be successful by Diabetes UK.

Considering the prevalence of diabetes in the borough a targeted approach will reduce costs, improve patient experience and reduce risks of complications related to the diabetes. Policies that need to be pursued include: improved town planning, regulation of food marketing, and clearer labelling of food and drink.

Response 3: Increased Prevalence of Mental Health Issues

Mental wellbeing also needs to be taken into consideration, particularly as urban planners and government tend to place greater focus on physical health. Mental health is affected by the design of the built environment, and consideration for mental health in planning is emerging as a trend. The London-based think tank Centre for Urban Design and Mental Health suggests 5 key points in addressing mental health needs in the design of places:

1. Provide communal spaces
2. Provide accessible green spaces
3. Avoid creating hostile environments
4. Maximise public transport
5. Give homes good natural light and space

Looking at more recent developments, it becomes clear that these are important priorities to be considered when planning and granting permissions on new developments, particularly the provision of communal spaces and the need to avoid creating hostile environments. Ensuring a high quality of public spaces between buildings is fundamental, to make sure they are inviting spaces and provide opportunities to mix and mingle with other people, is key to preventing social isolation. Denser development will also mean public spaces are likely to be more intensively used, emphasising the importance of proper long term management and maintenance arrangements. Access to green spaces is fundamental for mental health and also allows for more physical activity. Brent in 2040 will ideally be a borough with a vibrant public life, where people of all walks of society integrate into the public realm without being deterred from it. Moving forward health cannot be thought of in isolation. By prioritising health through urban planning, there will be a number of benefits to the economy and the environment⁵⁹⁹.

Response 4: Increased Demand on Health and Social Care

Instead of differentiating between health and social care, taking a more holistic and integrated approach to care for certain population groups could improve the efficiency of these services. Further detailed research is necessary, but the NAIL project provides a good example. If financial pressures on the NHS and other areas of the healthcare system continue to grow as expected, then unmet demand for care will need to be covered by volunteers and friends and family members of people requiring care. More starkly, standards of care will fall or

⁵⁹⁹ RTPI (2014) *Planning Horizons – Promoting Healthy Cities*, RTPI: Glasgow

demand for care remain unmet. While the healthcare system should ideally seek to not be overly reliant on the provision of voluntary and informal care, a strong support/relief system through organisations and local government should be in place to ensure that health and wellbeing of those providing informal care next to their daily lives are not compromised on.

The Kings Report⁶⁰⁰ provides various suggestions as to what can be done on a London wide basis on Health and Social Care. For example, they suggested that councils should encourage the use of Section 106 planning obligations, potentially including the Community Infrastructure Levy, to help redevelop primary care premises. Developers and public health bodies should also work closer together to incorporate 'active living' into new developments, access to green spaces and parks, social interaction and other measures to benefit physical and mental health. An example of this approach is the planned new development at Canada Water, being developed by British Land. Working with the London Borough Southwark, and the local CCG, the developer is formulating plans for a new health centre on the site, as well as wider healthy elements in the plan, including safe and active walking routes, social interaction and access to green spaces.

Salford brought together staff from NHS organisations and the Council to create, Salford Together, one of the first Integrated Care Organisation (ICO) in England. The ICO has enabled 2,000+ health and social care staff (district nurses, social workers, hospital staff and mental health professionals) to work within one organisation, creating a more streamlined service for people who use their services. Following public consultation, Salford Together was established and the Council provided joint governance alongside the CCG.

Patients and service users now have faster access to services, there is a greater focus on mental health and long-term conditions and reduced duplication of assessments and tests. Staff have access to a broader range of health and care specialists and the ability to provide better continuity of care, leading to improved staff satisfaction. Salford Together work with staff to discuss patient needs and develop shared care plans to make sure they get the right care.

Another broader initiative suggested is a programme of improved intelligence for prevention and care through the use of data linked across different social and care platforms. A key element will be developing a consistent data set, with standards for child and adult health data definitions, to enable analysis.

Response 5: Impact of Wider Determinants of Health

The social determinants of health are largely outside the scope of those who deliver healthcare, with risks driven by individual behaviour (smoking, diet, exercise) in the context of societal influences (housing, schools, employment) and environmental factors (air quality, physical environment).

There are various initiatives that look to improved social aspects of people to improve knock on health impacts. The People's Health Trust is an organisation that funds resident-focused approaches as a means of addressing the underlying structural causes of health inequalities.

Social isolation

One example of the work the People's Health Trust do involves promoting IT literacy in the elderly as a way of addressing social isolation. The Bell Green Silver Surfers was an IT support

⁶⁰⁰ London 2030 and beyond Report of the King's Commission on London

group designed for people over 60, although most participants are in their 70s and 80s. The group control the focus of activities and the pace of the group. Many participants had tried IT courses at local colleges and community venues before, and consistently reported these to be too pressurised and structured.

Through their engagement with the project, older people have improved social links and ties, particularly with family living far away and grandchildren. This project is particularly interesting given its ability to improve inter-generational interactions and promote inclusivity using digital communication tools. The project has plugged a gap in local service provision, providing a free IT and social media course delivered in a format and at a pace that suits its client group.

The Brent Community and Voluntary Sector (CVS) in partnership with Brent Council and Brent CCG jointly funded the Social Isolation in Brent Initiative (SIBI) that aims to target and address social isolation in individuals who are over 18 and are identified as being at risk of or suffering from social isolation. SIBI signposts people to clubs, groups, classes and activities across Brent and can support people to discuss how they may overcome their social isolation.

Fitness

The People's Health Trust also funded Centre Spot a project based in the Friar Park Estate in West Bromwich, an area experiencing high levels of crime, unemployment and poor educational attainment. Beneficiaries have taken part in training and employability programmes for the local community and have used the sports facilities and mentoring support available.

The centre aims to help young people develop positive and healthy behaviours, by engaging them in sport as a distraction from crime, providing volunteering opportunities and work experience, developing key employability skills and working with young people to develop their confidence and self-esteem. Having developed strong links with the local housing association, youth service and fitness centre, Centre Spot also has access to a team of qualified sports coaches and instructors, locally based staff and volunteers.

Project staff, volunteers and beneficiaries felt that the project had helped to boost the local area through giving its beneficiaries improved self-confidence, creating better social links and ties and improving the community atmosphere on the Friar Park Estate.

These are two examples of how local groups worked to address some social determinants of health. There are also some more specific approaches that can be taken by the council to work on the societal influences.

Nutrition

London boroughs have the power to introduce mandatory traffic light labelling and nutritional information on menus in all restaurant and food outlet chains in London, by using their byelaw and licensing powers.

Employment

Employment can have a significant impact on an individual's mental health often relating to low pay. Brent is one of over 650 London employers that are fully accredited with the London Living Wage Foundation, paying all employees at least £9.15/hour. Brent should consider what

steps can reasonably be taken, including incentives that build on the current business rates relief scheme, to better encourage local employers to join up to the scheme.

Travel

The borough could also encourage active travel by investing in technology. Mobility technologies are changing, and out of the many competitors, it is up to Local Authorities to take a leadership role and action to shape how their future mobility mix will be expressed.

Currently, the perspective of electric and automated cars is very dominantly portrayed in imaginations of the city of the future. However, from a health perspective, sitting in cars has been attributed to low levels of physical activity. The electrification and automation of cars is not therefore likely to change this activity pattern.

A viable alternative is the prioritisation of active forms of transportation. Walking should be the preferred option of transportation for short trips, and planning could focus on identifying areas where short-term walking trips are not feasible due to the distance needed to cover. 'Walkable neighbourhoods' should hence be one of the main planning priorities. However, the decision to walk does not solely depend on the distance to the respective destination, but also on the quality of the public realm. Some of the approaches to make streets more walking-friendly have been laid out in the Mayor's Healthy Streets Programme.

Another trend that the borough could embrace is the emerging technology of electric bikes, more specifically pedelecs, which require riders to pedal at all times whilst gaining a speed boost from the electric engine. These increase the range an average person could cover by bicycle and hence the number of feasible bike trips. The health benefits of pedelecs have been explored in a study by Peterman et al (2016). Like walking, cycling also depends on the necessary infrastructure, and especially the quality and safety of it. Brent could explore options to increase its cycling infrastructure and the safety standards of it. Integration into the expanding city-wide network of cycling superhighways could also open up opportunities for people working outside the borough to commute by bicycle or pedelec. The average distance for commuters from Brent is 11km (approx. 30 min by pedelec), so potentially a share of these trips in the future could be covered through pedelecs if the appropriate infrastructure is in place. A further point of exploration might be the use of cycling and walking to get to and from transit stops and hence allow for a more active 'last-mile transportation'.

It would also be helpful to look at the potential in multi-borough partnership as Londoners move between boroughs for school, work, leisure and healthcare. This makes multi-borough working key to planning and delivering health and care services and to effective health promotion and prevention⁶⁰¹. Using its power, knowledge and resources, the council can create integrated approaches to societal issues which will likely have a positive impact.

⁶⁰¹ Better Health for London: One Year On

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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

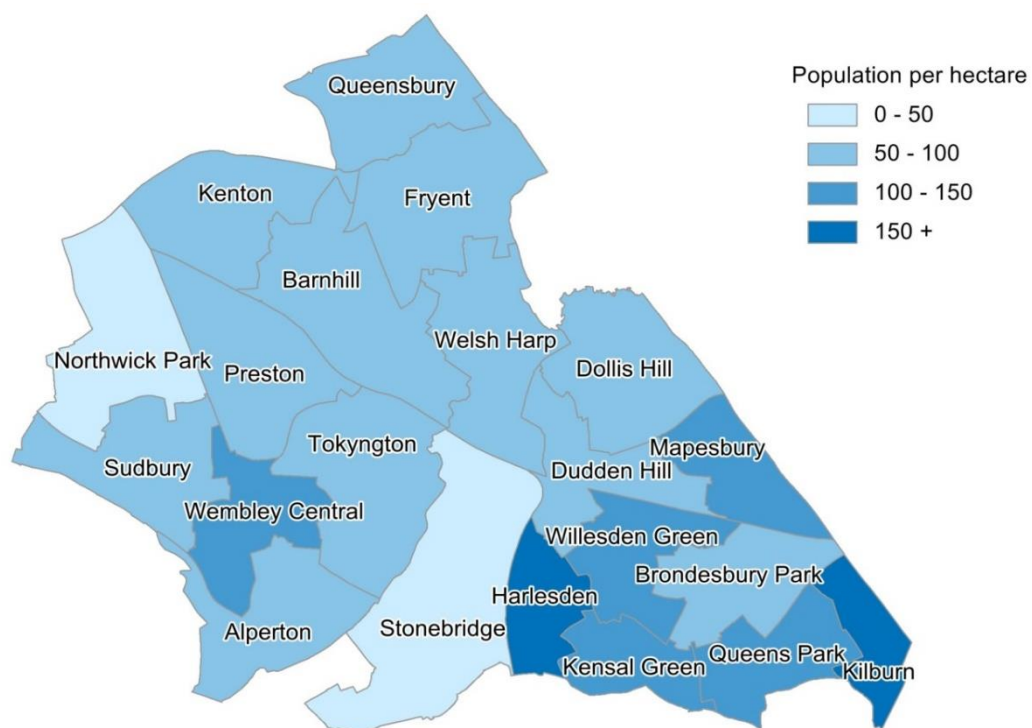
Demographics

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



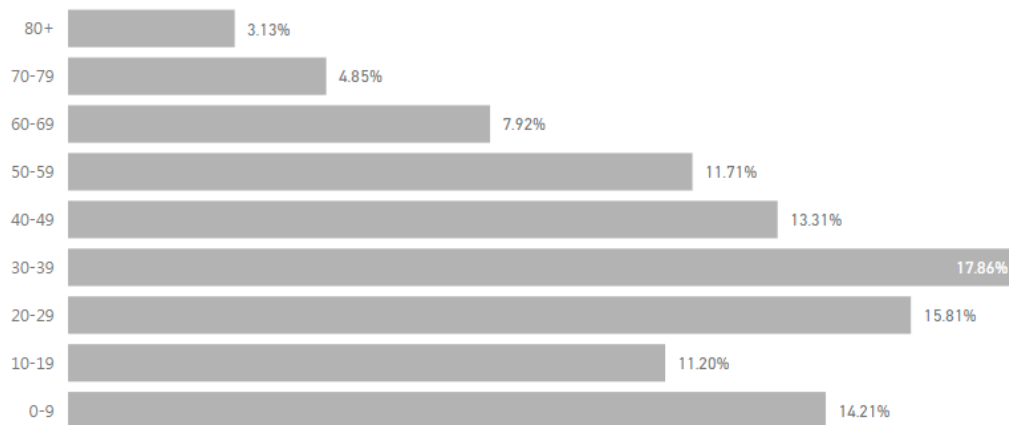
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Source: GLA Population Estimates (2017)

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.

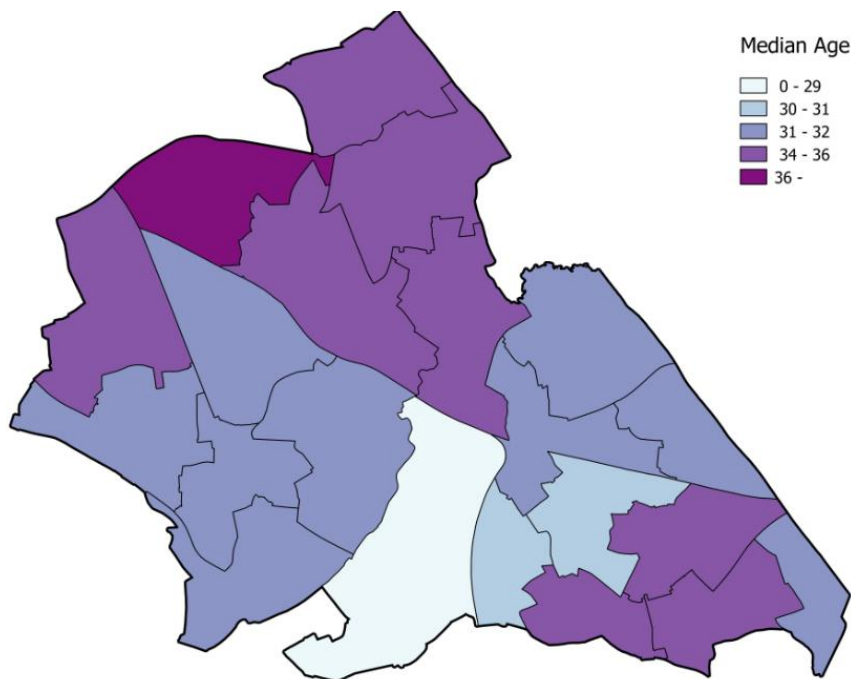
Figure 279: Brent's population by age as a percentage of total population



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



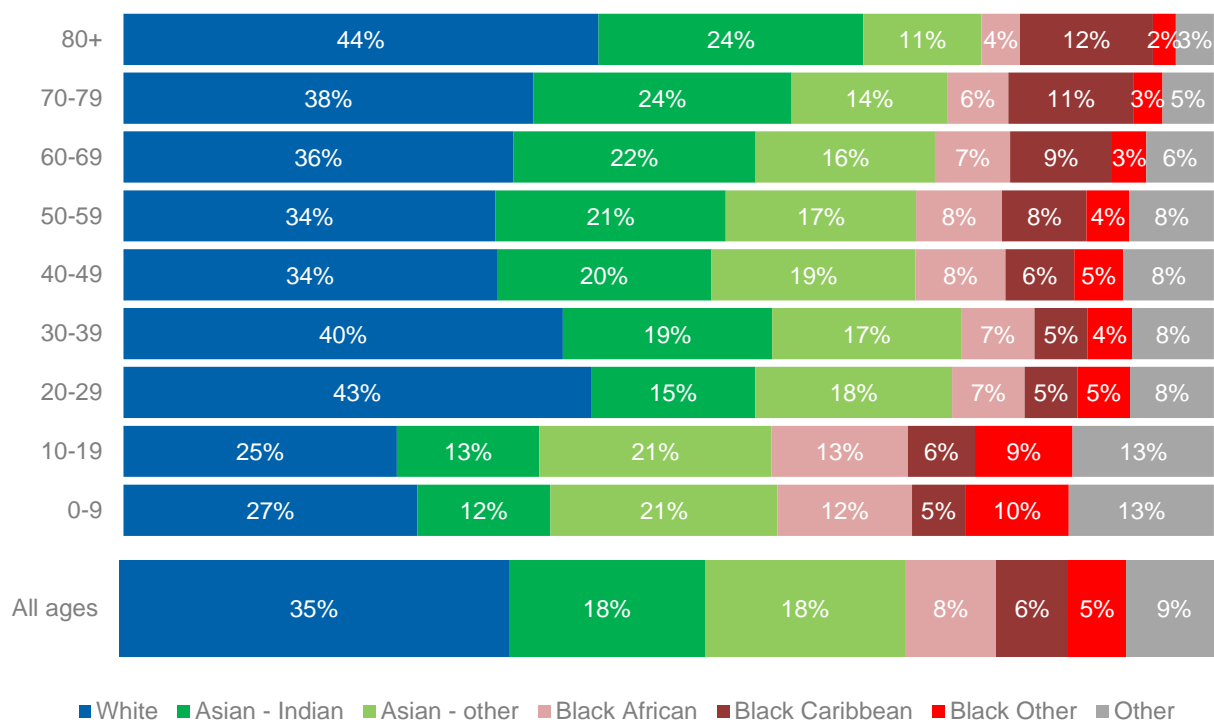
Source: GLA Population Estimates (2017)

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

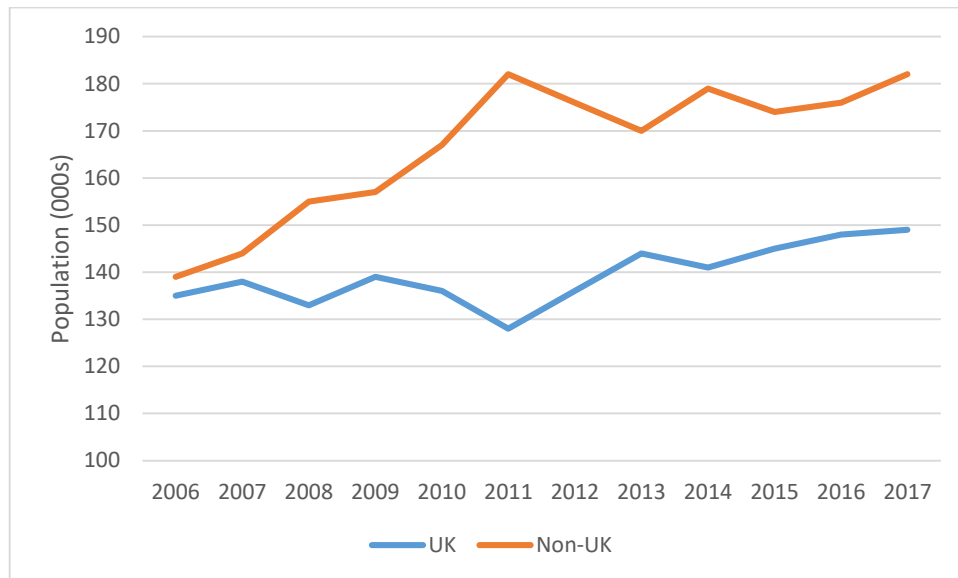


Source: GLA population Estimates (2017)

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.

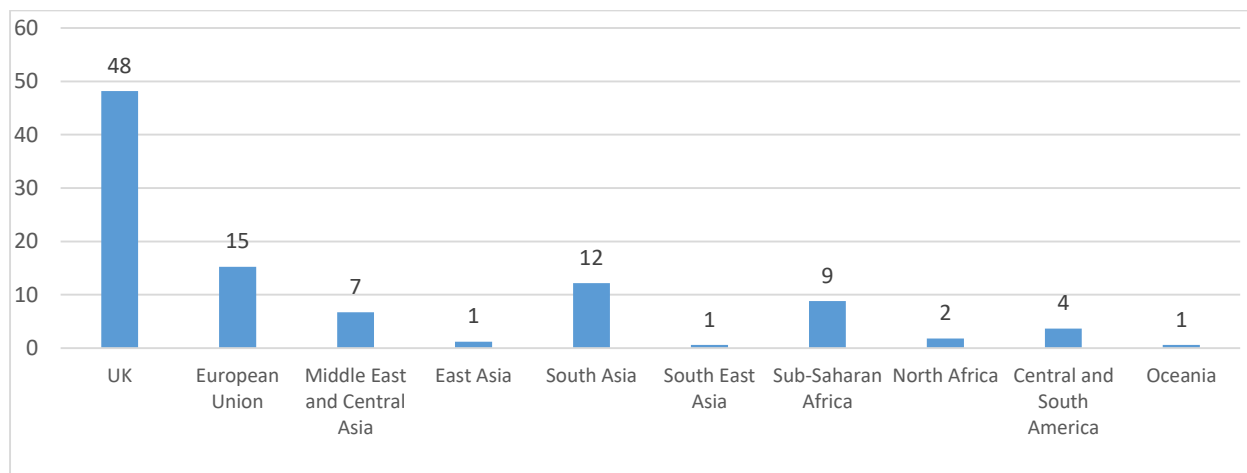
Figure 282: Brent's Population 2006-2017



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.

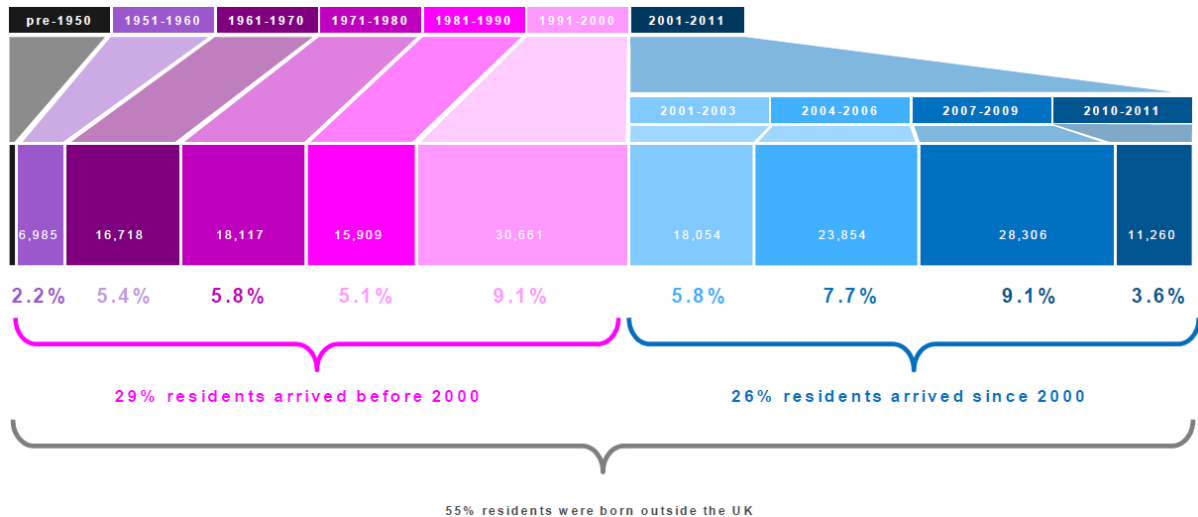
Figure 283: Brent's Country of Birth %



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)

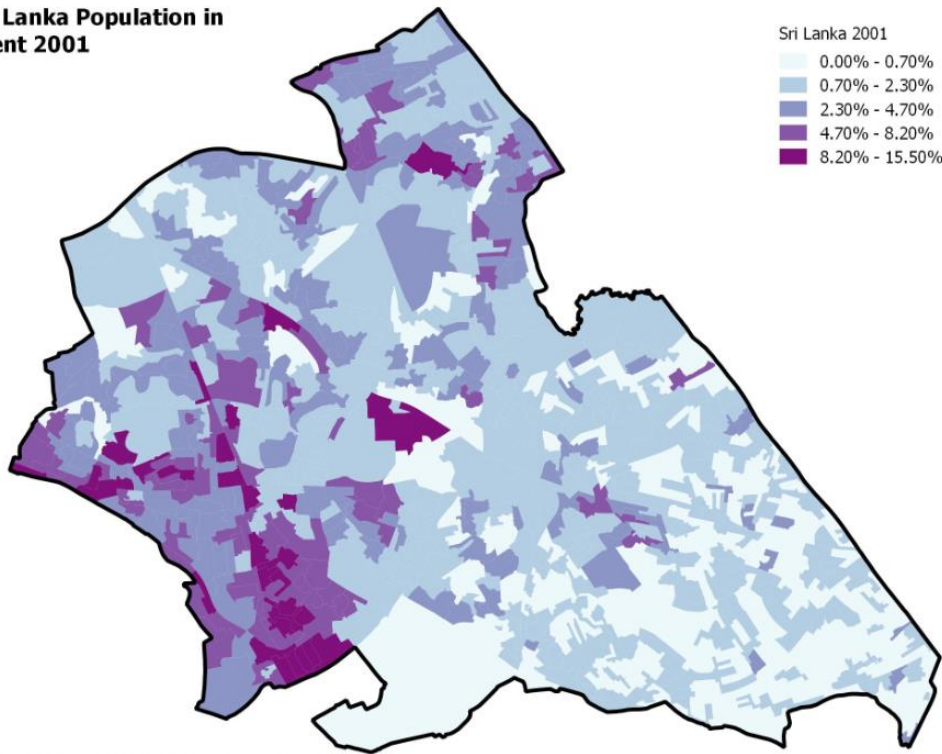
Significant immigrant populations within the borough include Sri Lankans (approx. 7,000) who tend to live in the north and west areas of the borough, a similar number of Somalians, who predominately live in Stonebridge and Harlesden, and ethnically Asian Kenyans, many of whom emigrated to the UK in the 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.

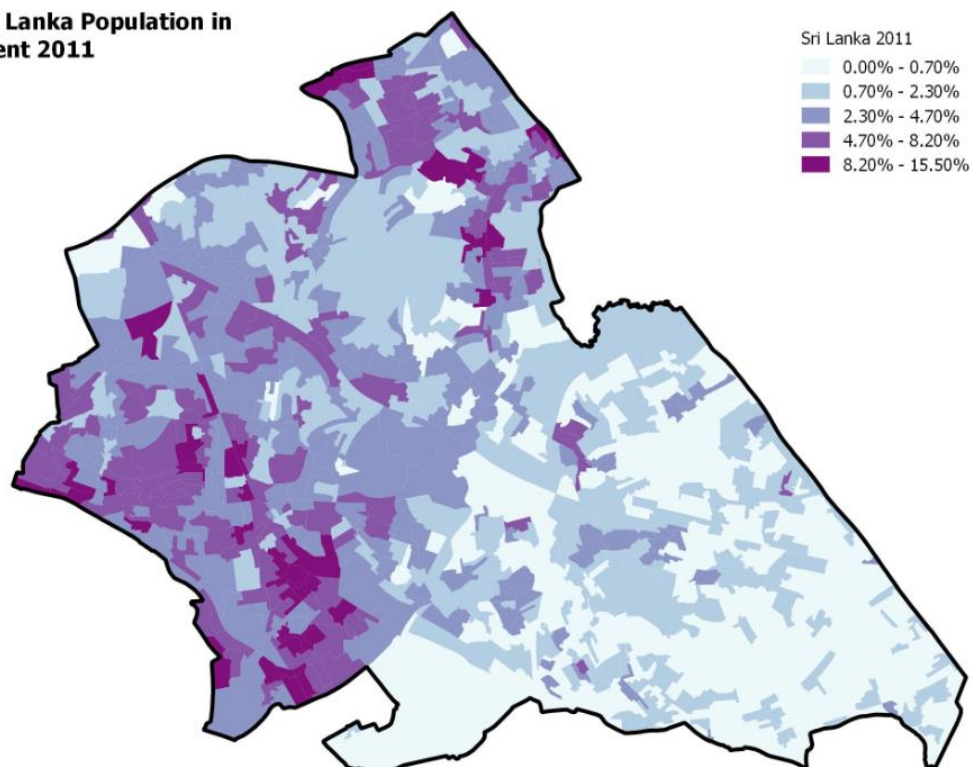
⁶⁰³ Trust for London (2011) No Longer Invisible: the Latin American community in London

Figure 285: Brent Residents by Country of Birth

Sri Lanka Population in Brent 2001

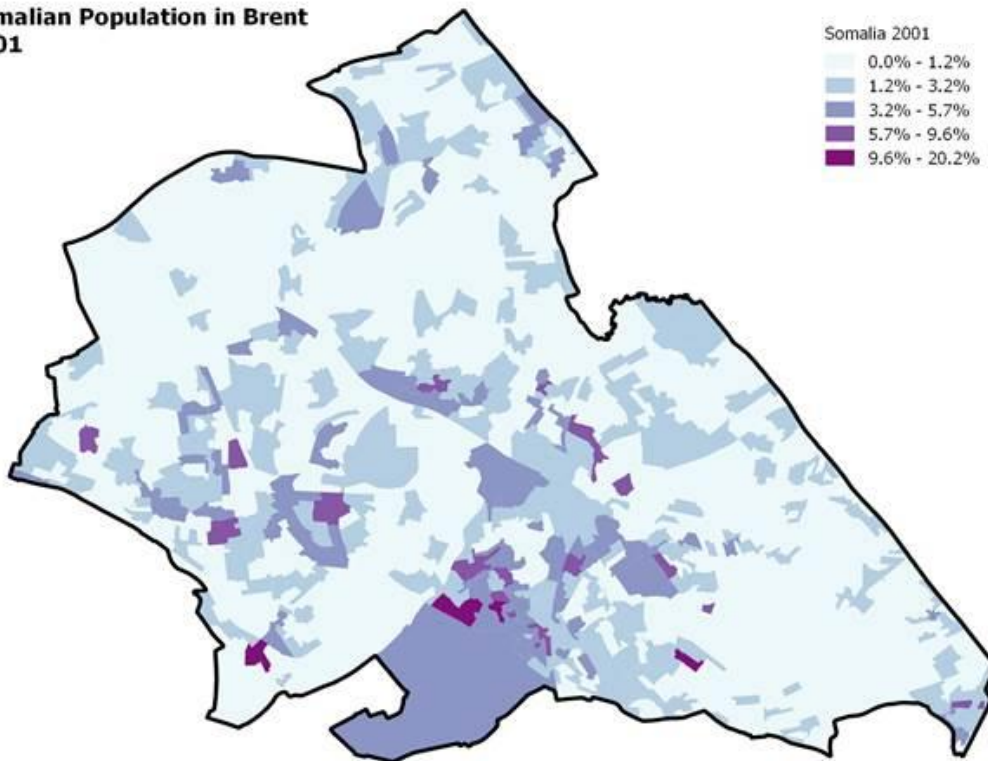


Sri Lanka Population in Brent 2011

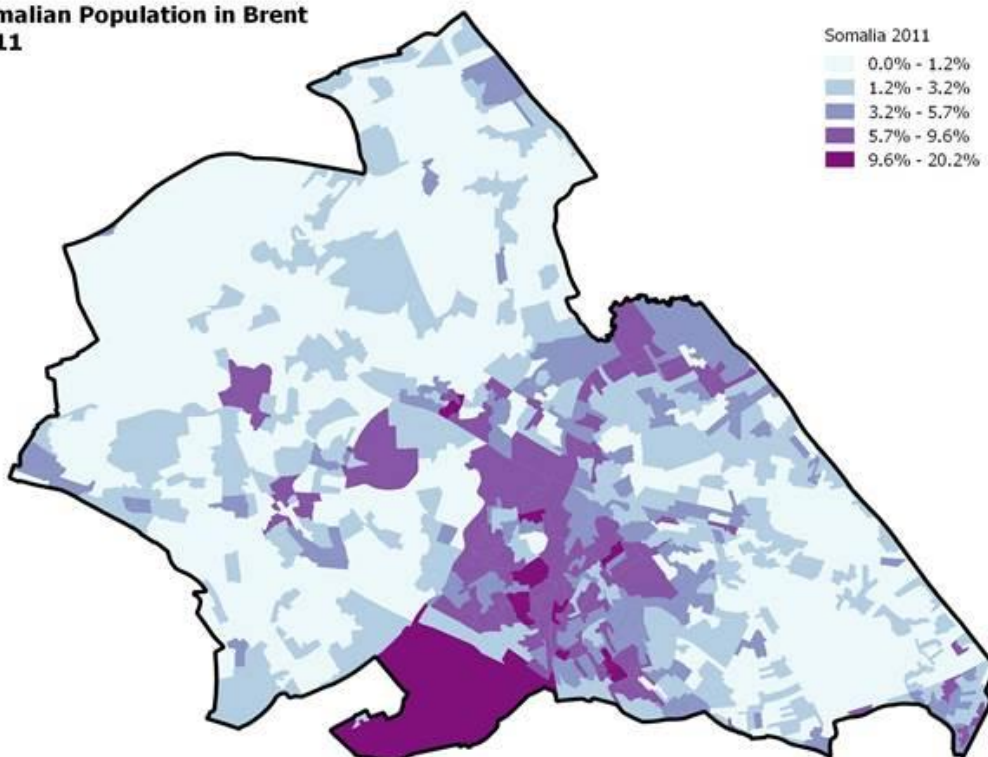


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**Somalian Population in Brent
2001**



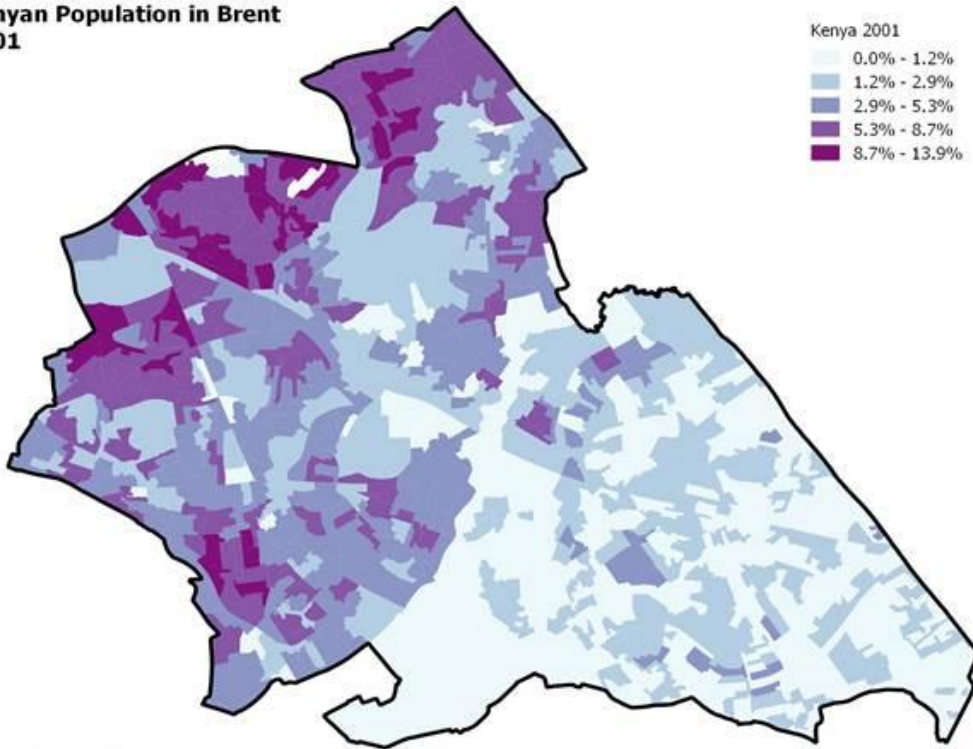
**Somalian Population in Brent
2011**



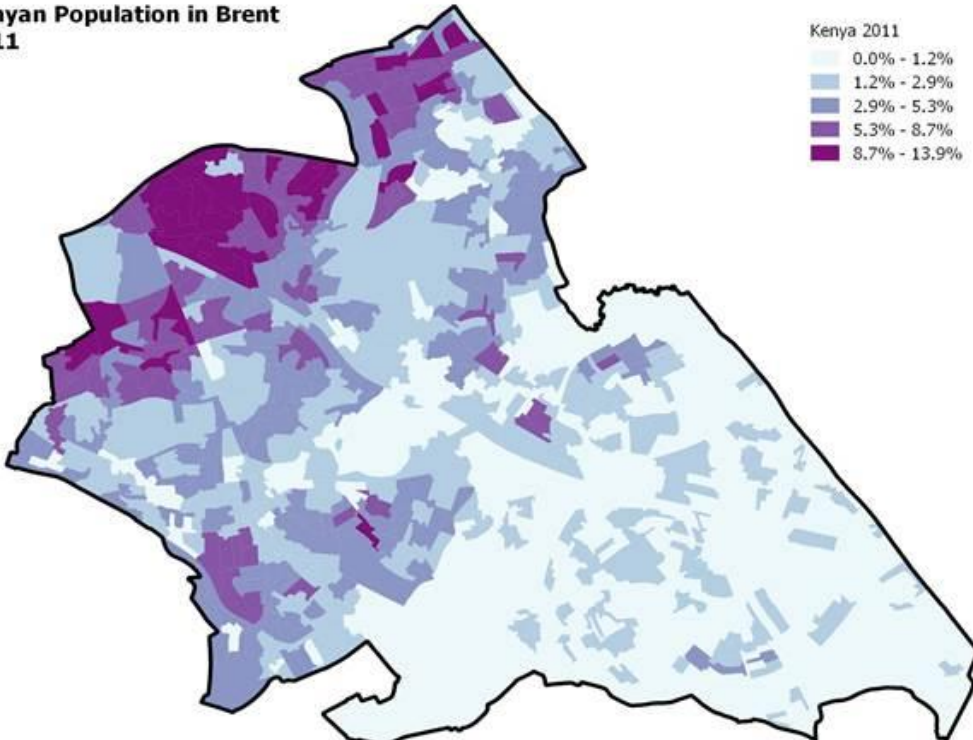
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**Kenyan Population in Brent
2001**



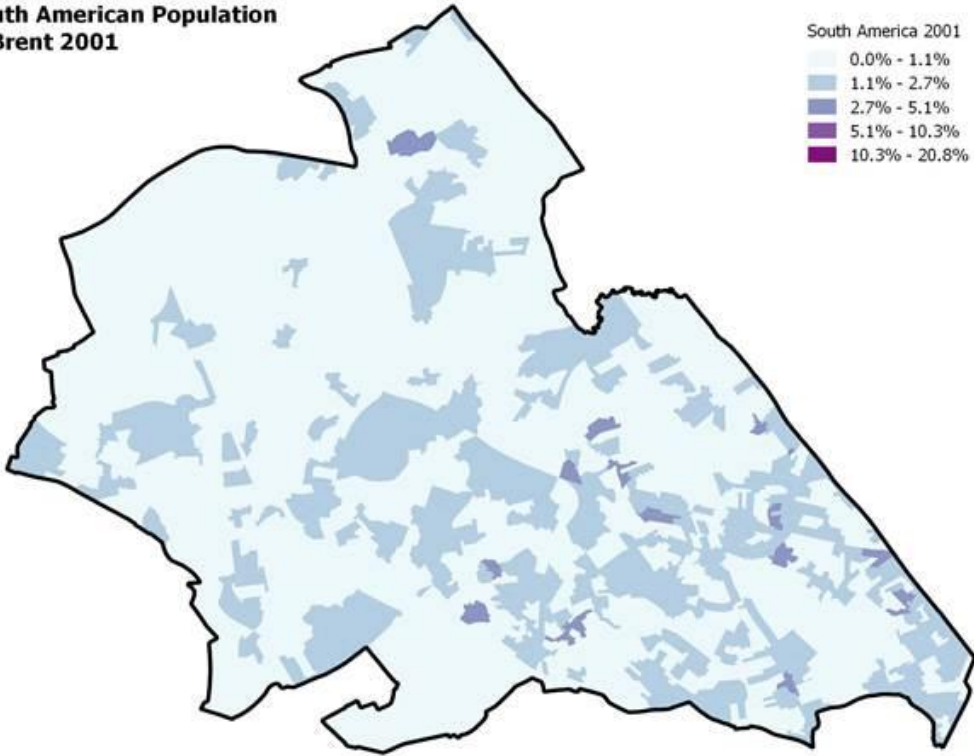
**Kenyan Population in Brent
2011**



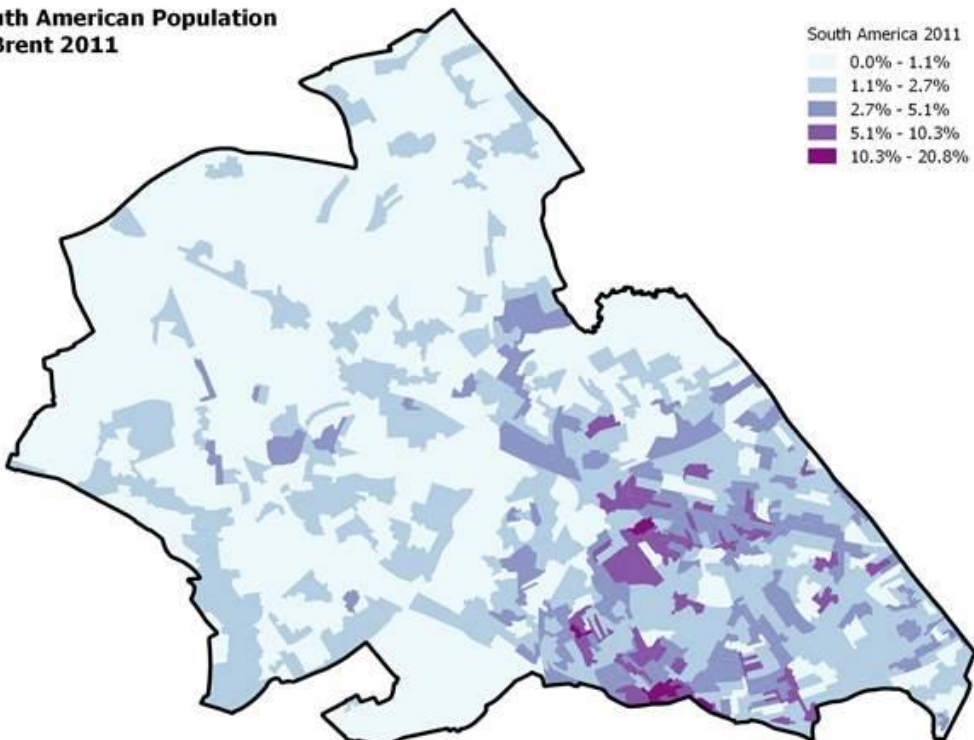
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**South American Population
in Brent 2001**



**South American Population
in Brent 2011**



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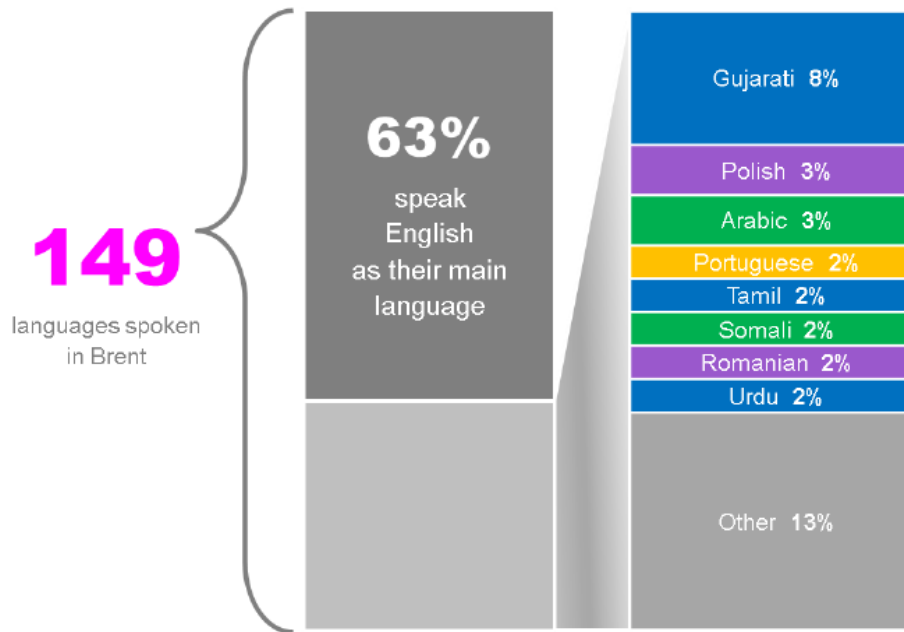


Source: Census (2001 & 2011)

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.

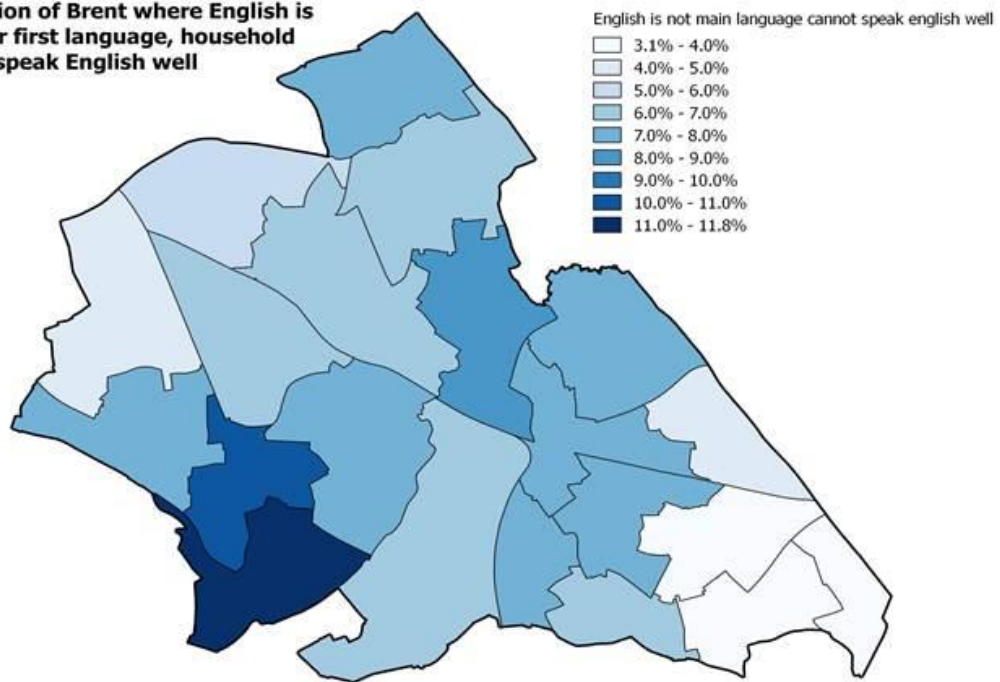
Figure 286: Languages Spoken in Brent



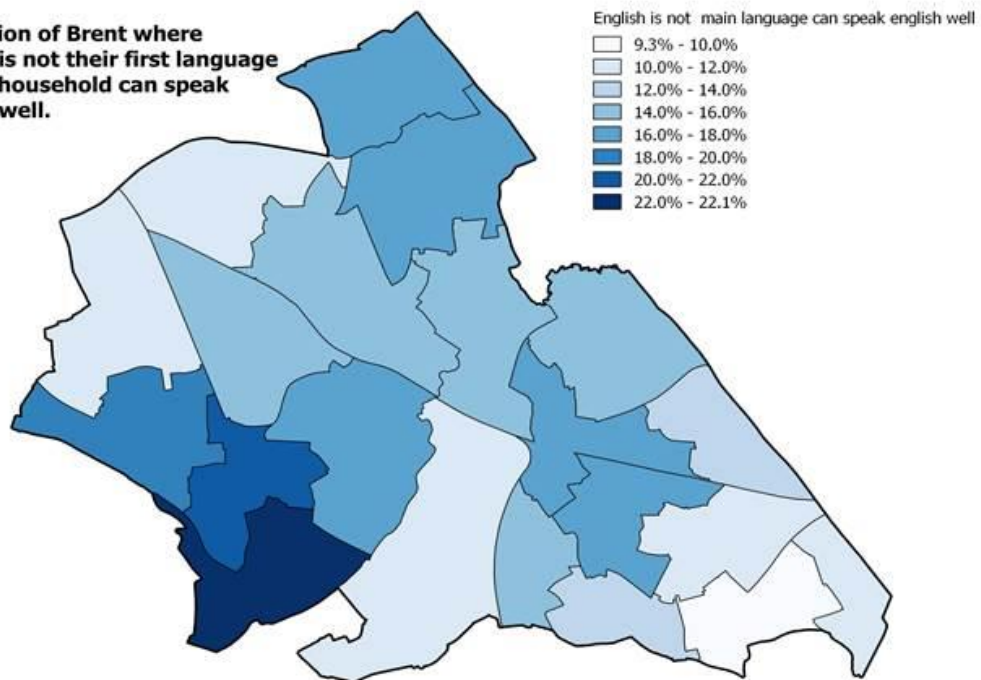
Source: JSNA 2015

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

Population of Brent where English is not their first language, household cannot speak English well



Population of Brent where English is not their first language but the household can speak English well.



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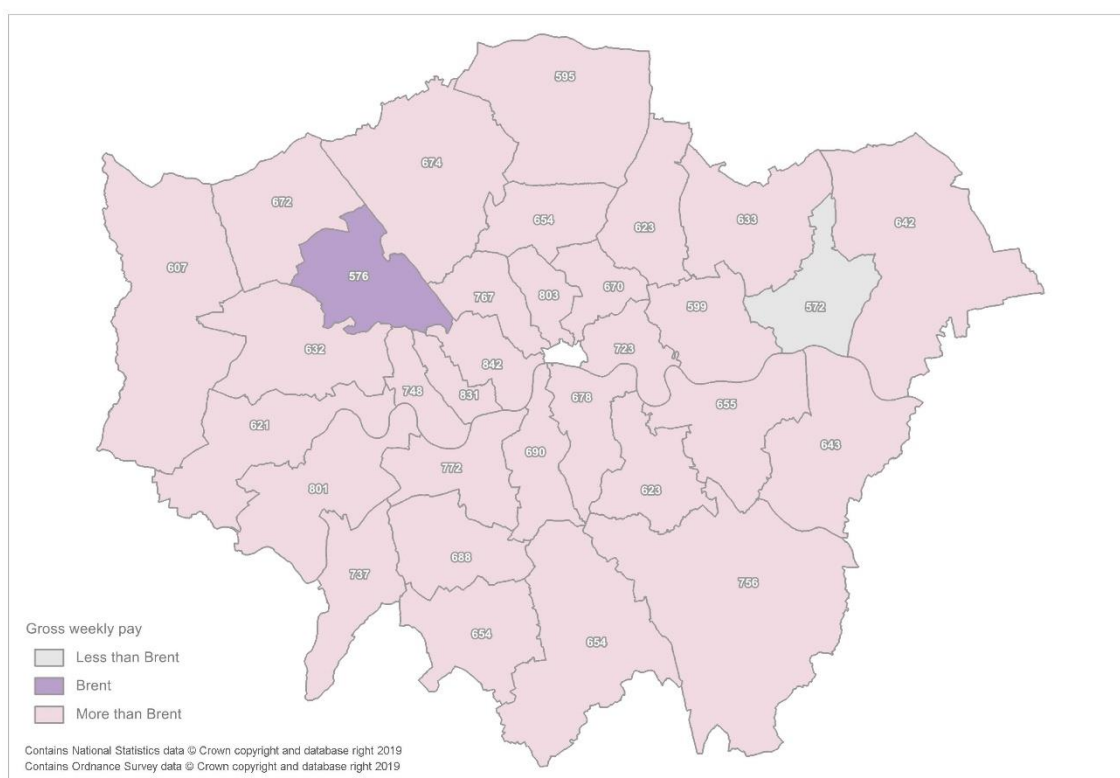


Source: Census (2011)

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



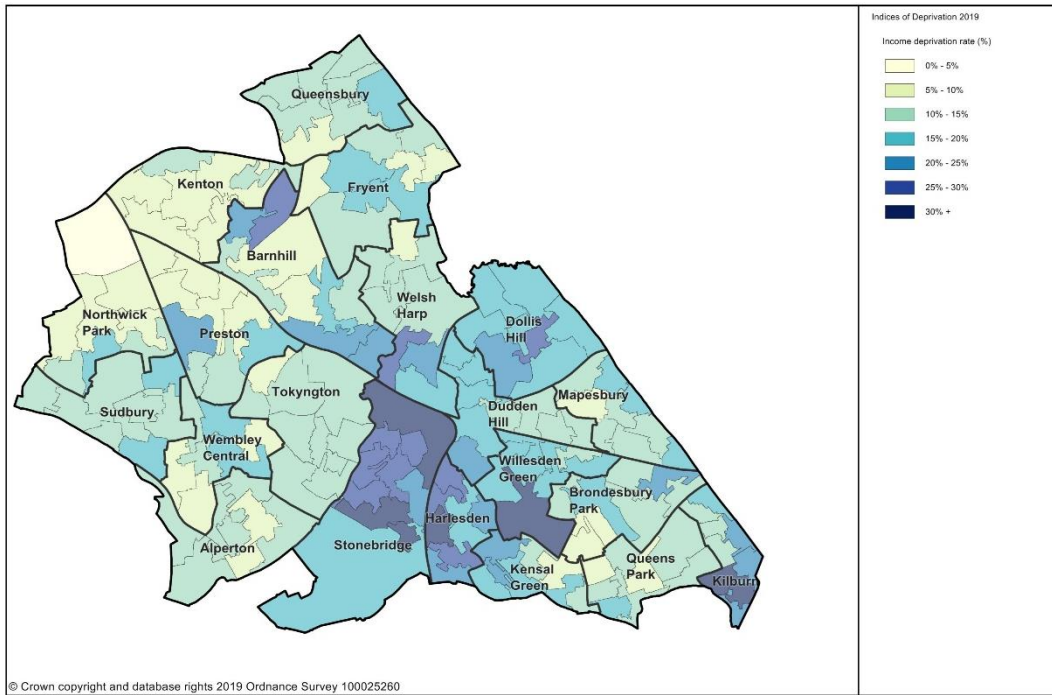
Source: ONS (2019)

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

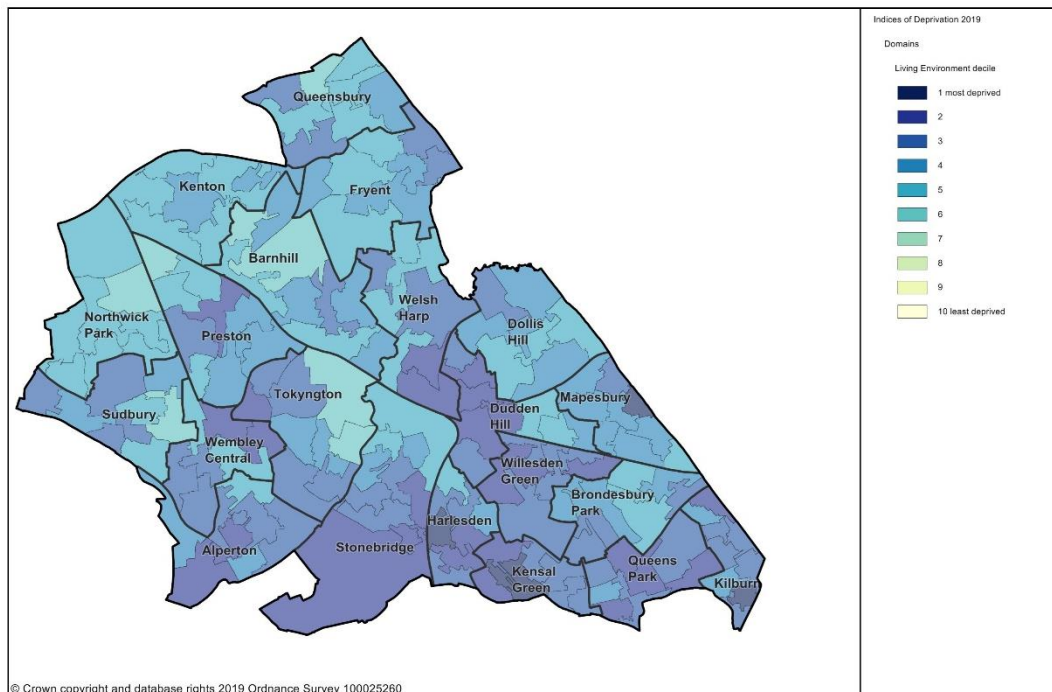
⁶⁰⁴ ONS 2018 Annual Survey of Hours and Earnings

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



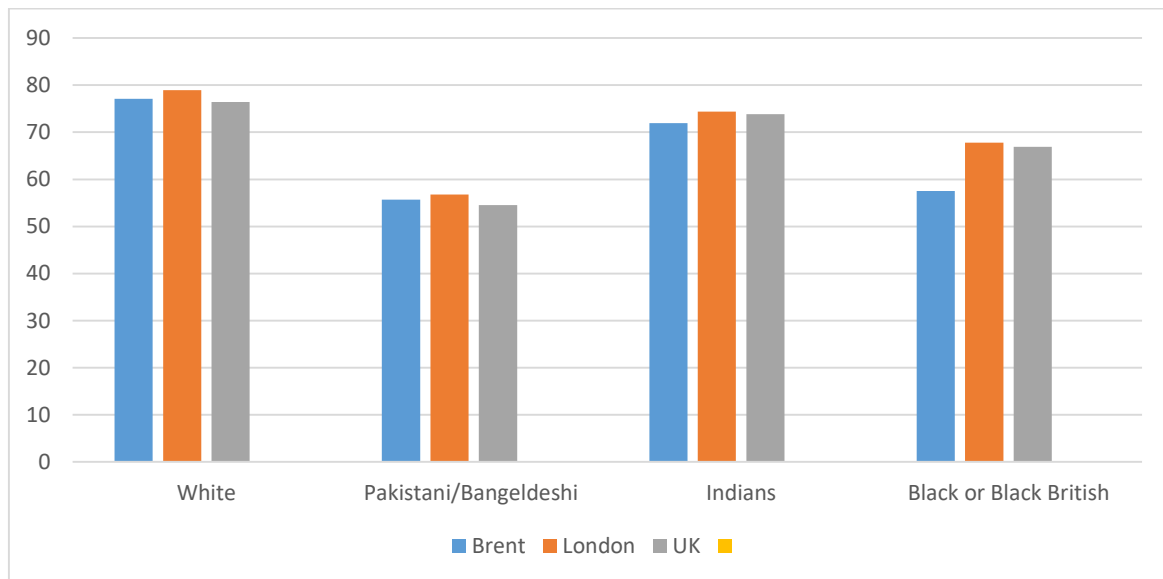
Source: ONS Indices of Multiple Deprivation GIS Mapping Service (2019)

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.

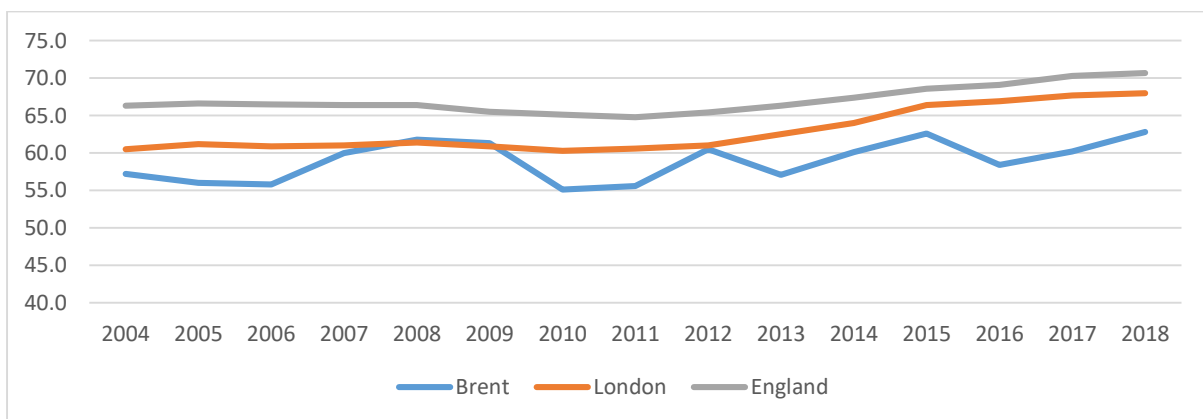
Figure 291: Employment rates by ethnicity 2017



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**

London Borough of Culture

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

Cultural Infrastructure Plan

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

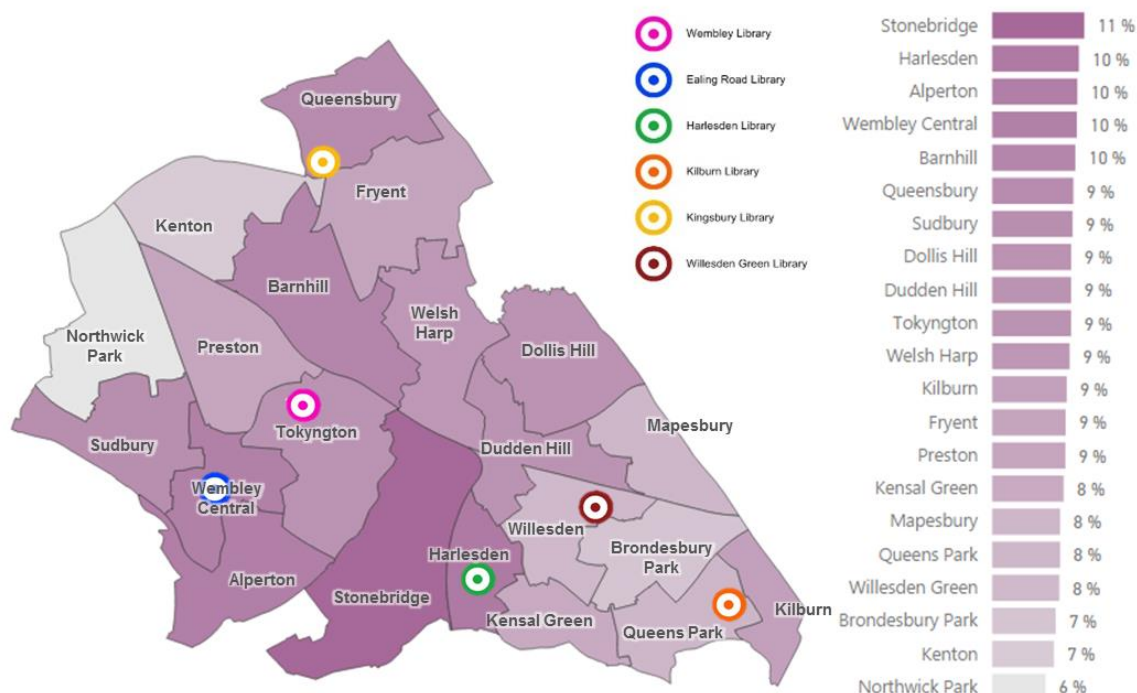
The respondents reported the highest levels of satisfaction with parks and open space, and the lowest levels of satisfaction with the libraries. However, the more recent 2017 YPLUS Survey discussed below reported that satisfaction with Brent's libraries is high amongst young users with an overall score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

Libraries

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.

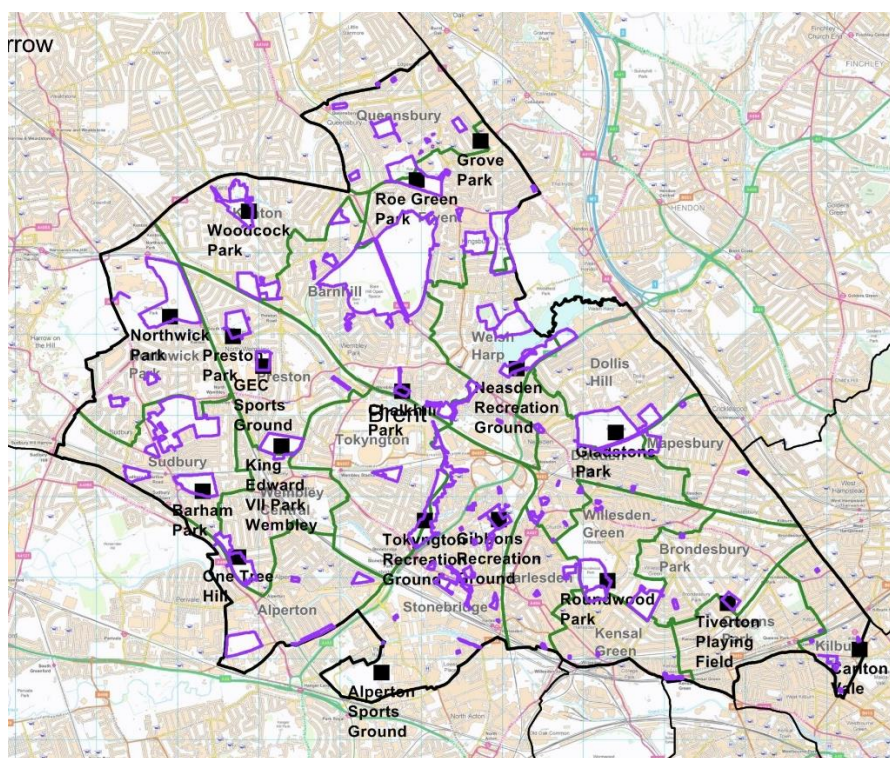
The 2012 Time Out Consultation Report reported that 25% of respondents had not participated in any sport or physical activity in the last 6 months, but that 75% said that they would like to

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%

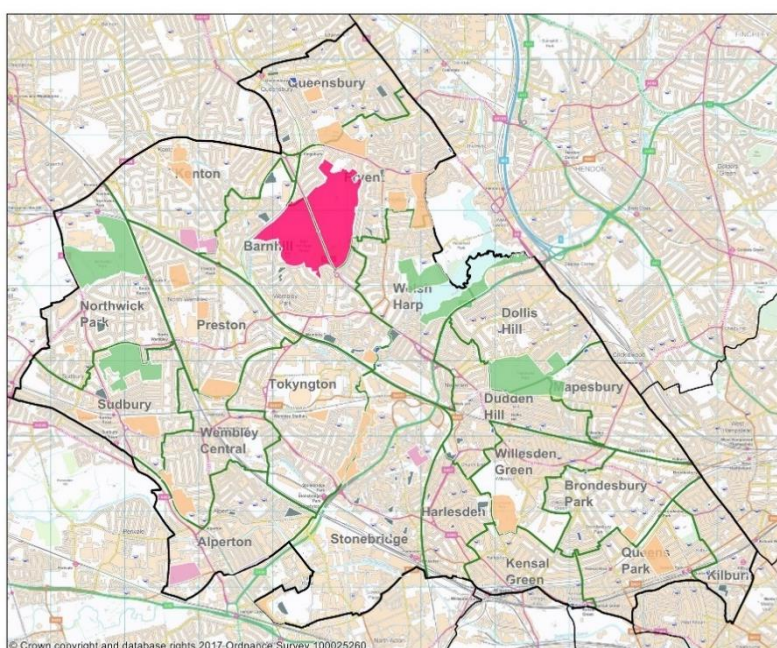
Walking was by far the most popular activity, followed by swimming, with cycling, aerobics, weight training and yoga or Pilates all receiving similar rate of response.

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 week⁶¹². 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

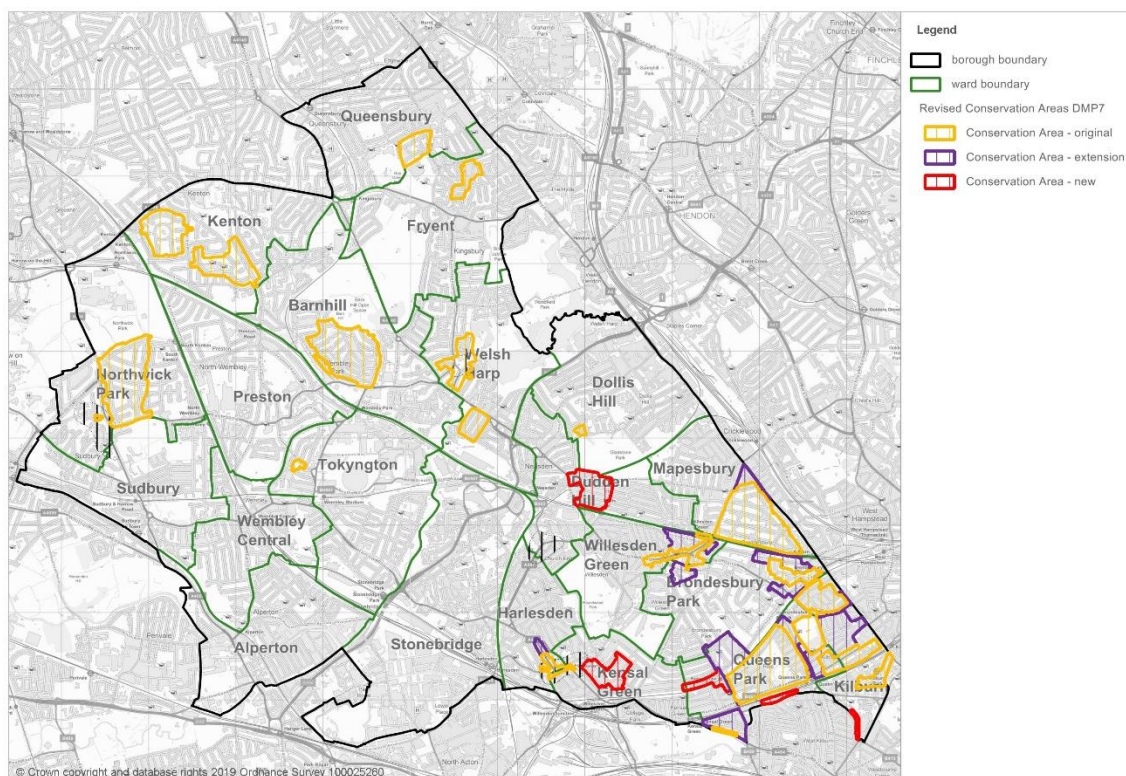
⁶¹⁴ GLA (2018) London Environment Strategy

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 appearance⁶¹⁷. 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 Cross⁶²³, 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.

Cinemas

Lexi Cinema

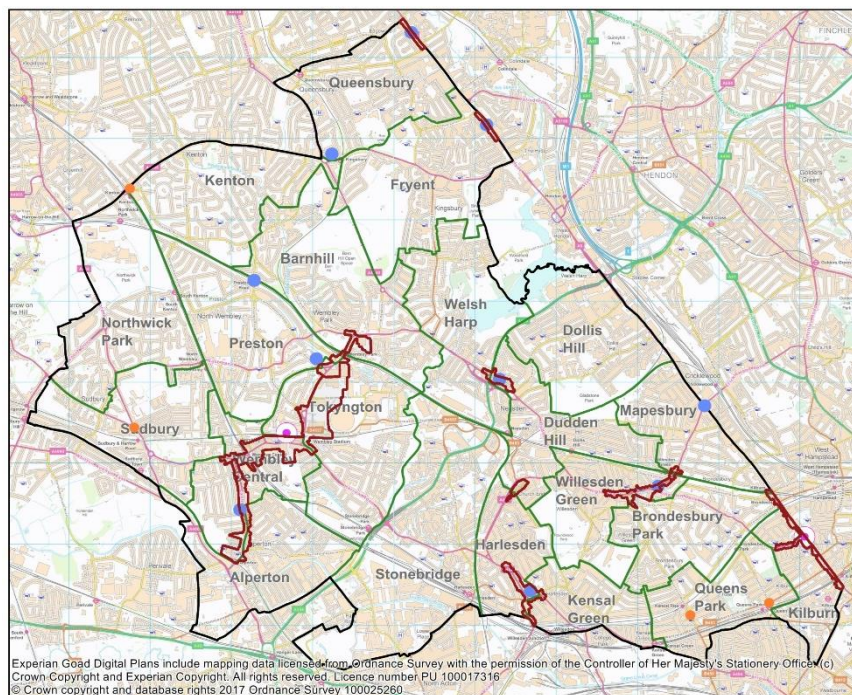
The Lexi Cinema as an independent organisation run mainly by volunteers. It shows mainstream films and live opera with all proceeds going to charity.

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

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

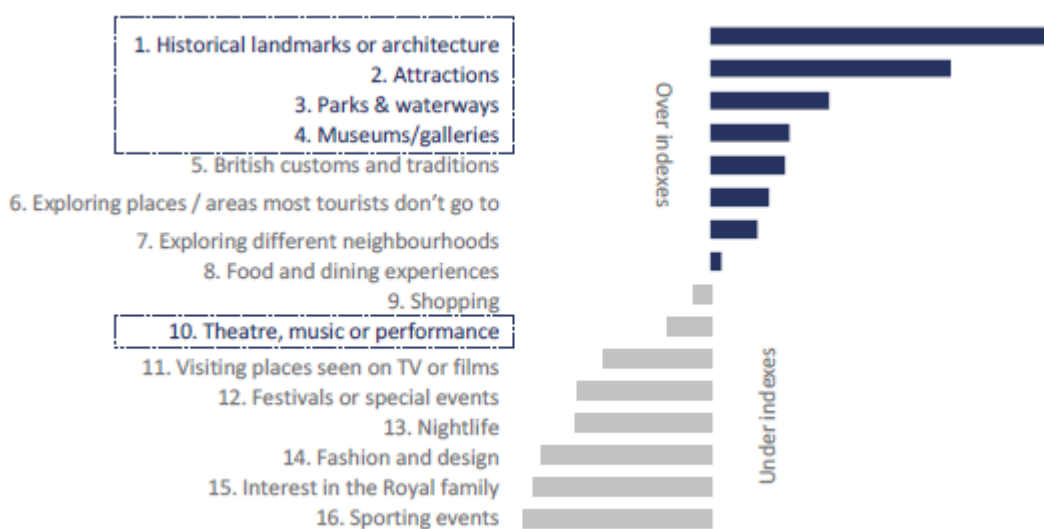
⁶³³ Brent (2018) Draft Local Plan Issues and Options

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

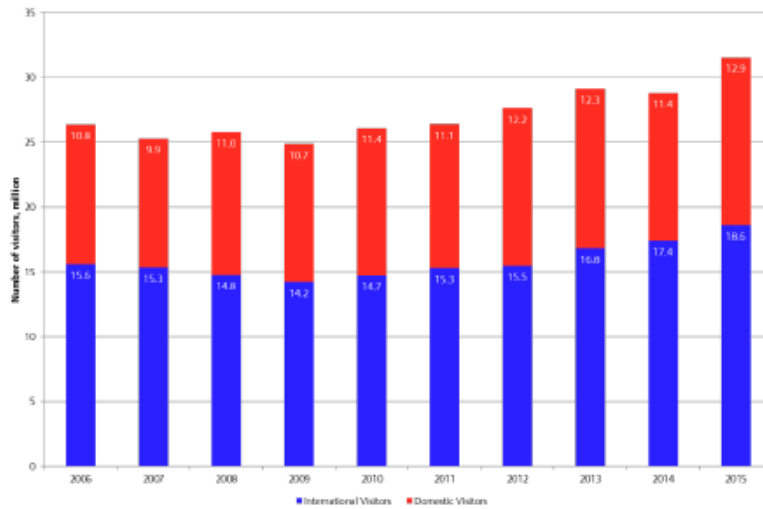
- Festivals
 - London Mela

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

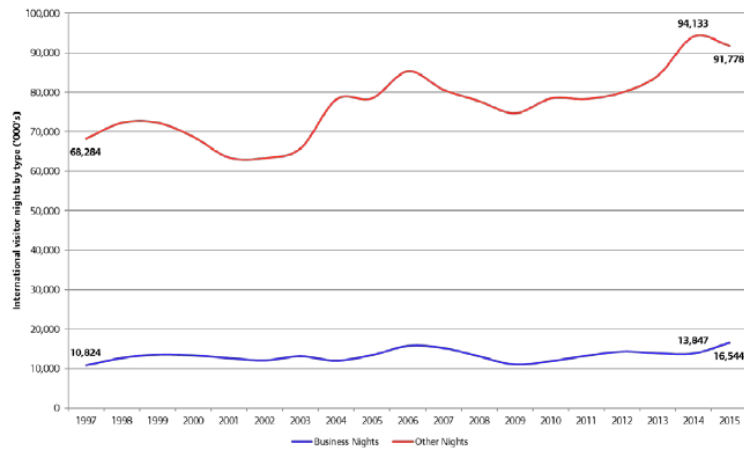


Source: International Passenger Survey, Great Britain Tourism Survey

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 cities, 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

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 share 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

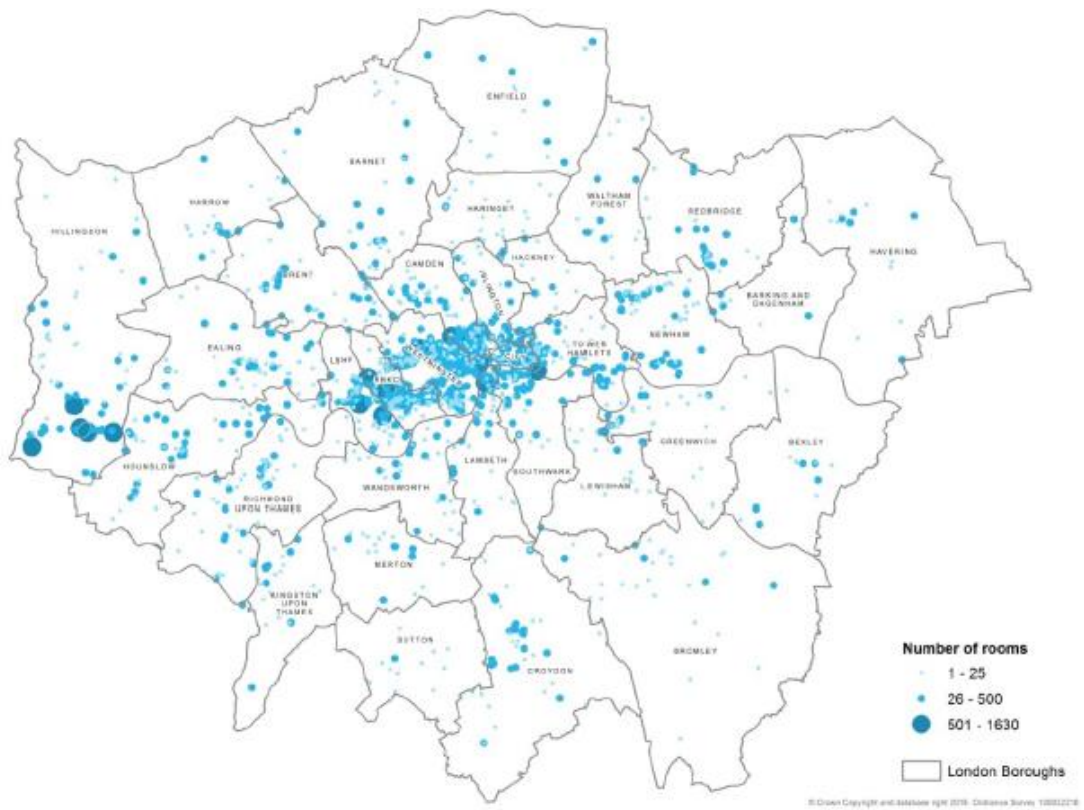
⁶⁴¹ GLA Economics (2017) Projections of demand and supply for visitor accommodation in London to 2050

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	604	0.3%
Camden	16,642	11.2%
City of London	7,319	4.9%
Croydon	2,629	1.7%
Ealing	2,347	1.6%
Enfield	696	0.5%
Greenwich	2,036	1.4%
Hackney	2,181	1.5%
Hammersmith and Fulham	4,466	3.0%
Haringey	391	0.3%
Harrow	581	0.4%
Havering	466	0.3%
Hillingdon	10,768	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	

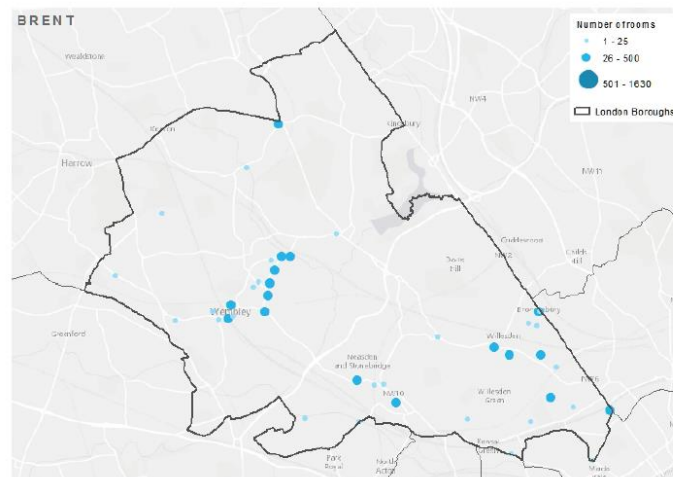
Source: London First Tourist Information

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

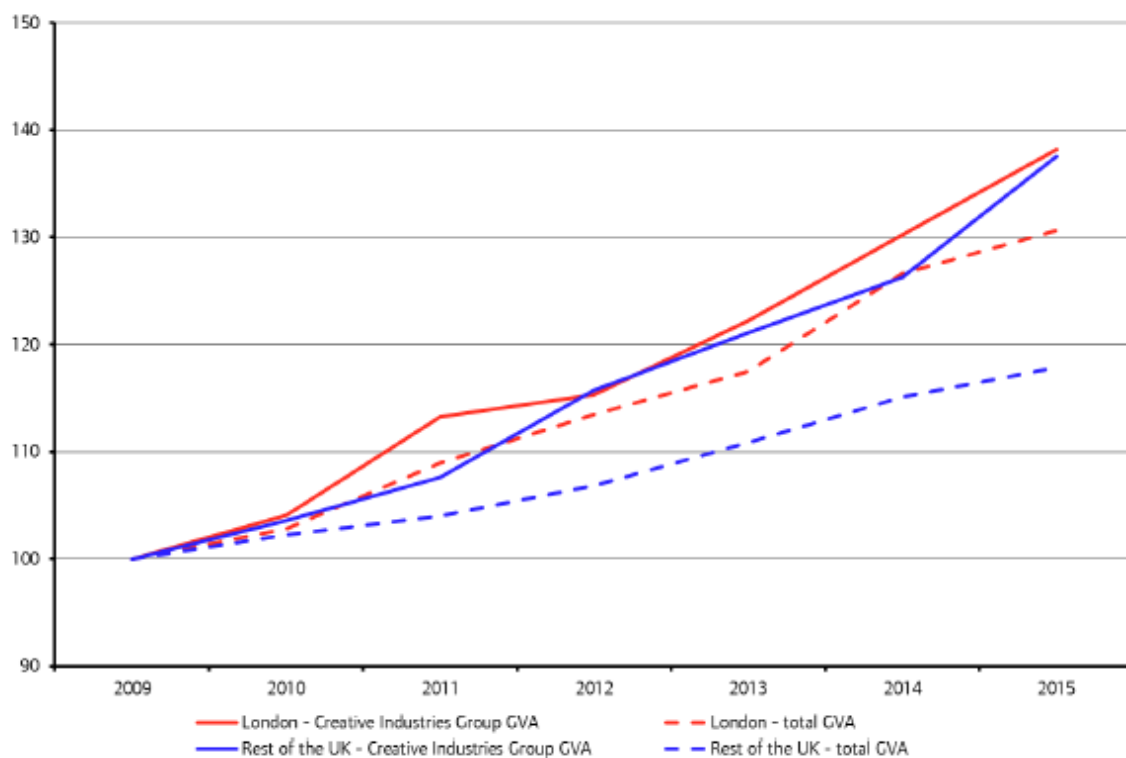
⁶⁴² GLA Economics (2017) London's Creative Industries, 2017 Update

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



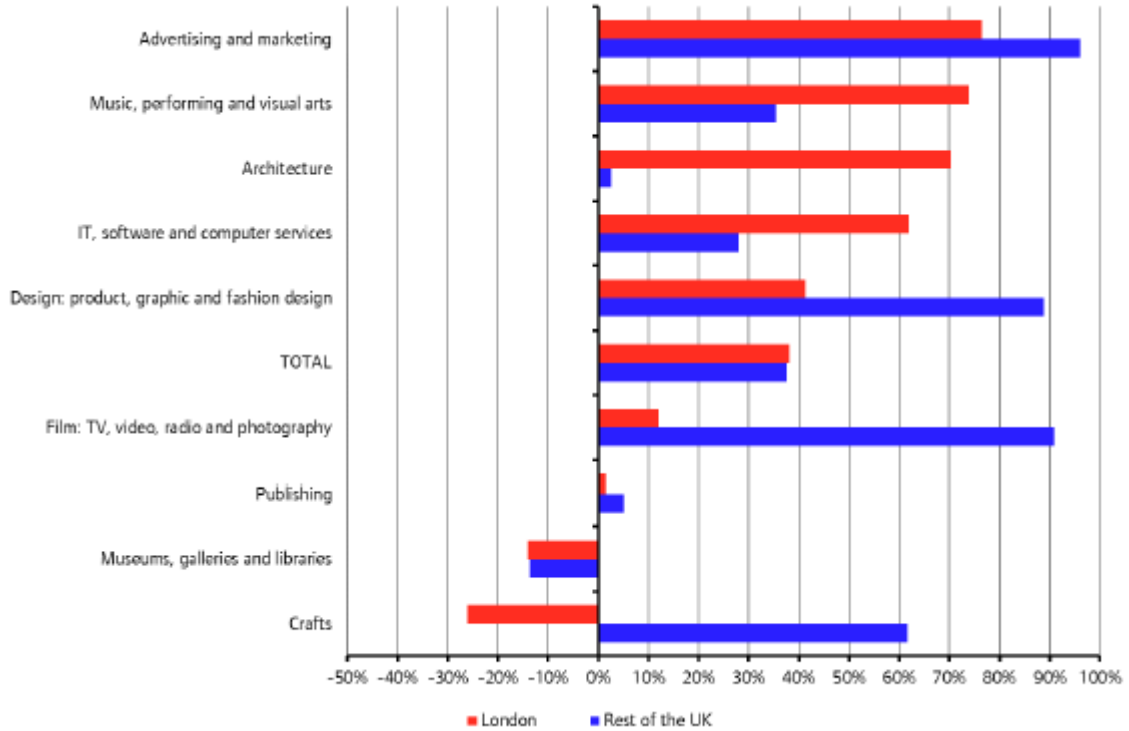
Source: GLA Economics calculations

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



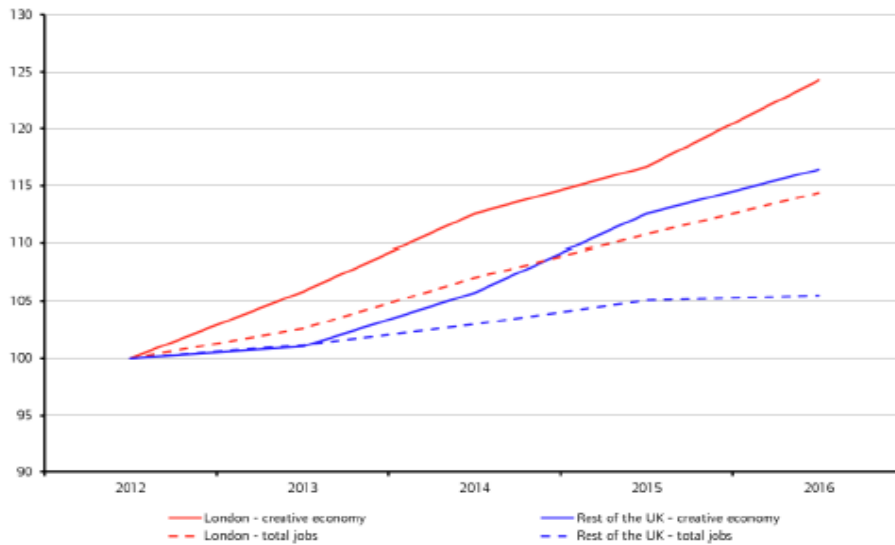
Source: GLA Economics calculations

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 nationals⁶⁵¹. 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 economy⁶⁵².

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

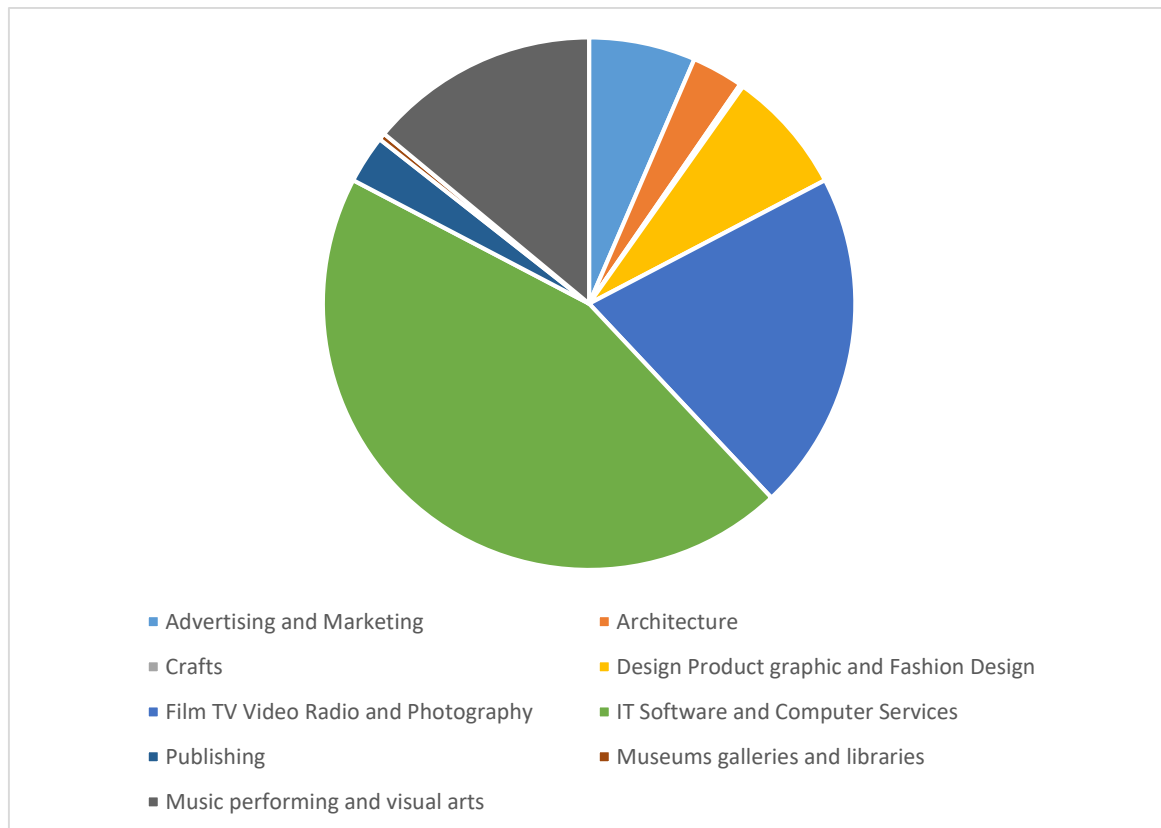
⁶⁵¹ ONS (2017) Breakdown of Creative Economy in London 2012 to 2016

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

Creative Workspaces

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

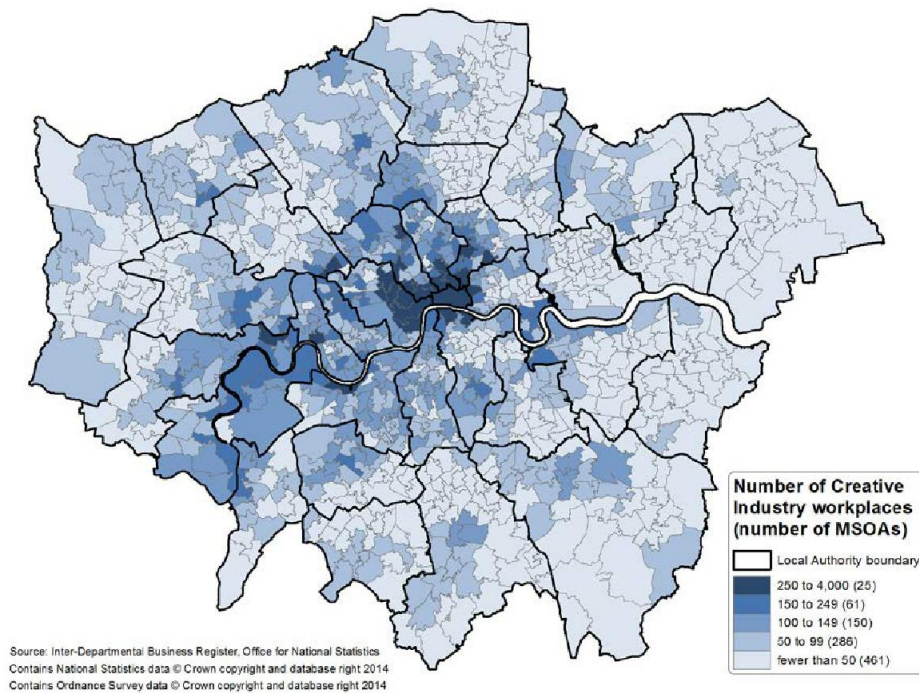
⁶⁵³ Regeneris Consulting, We Made That and PRD (2017) Brent Workspace Study

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 businesses⁶⁵⁷. While Brent was not amongst the first six CEZs designated by the Mayor in December 2018, it is still able to use its 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

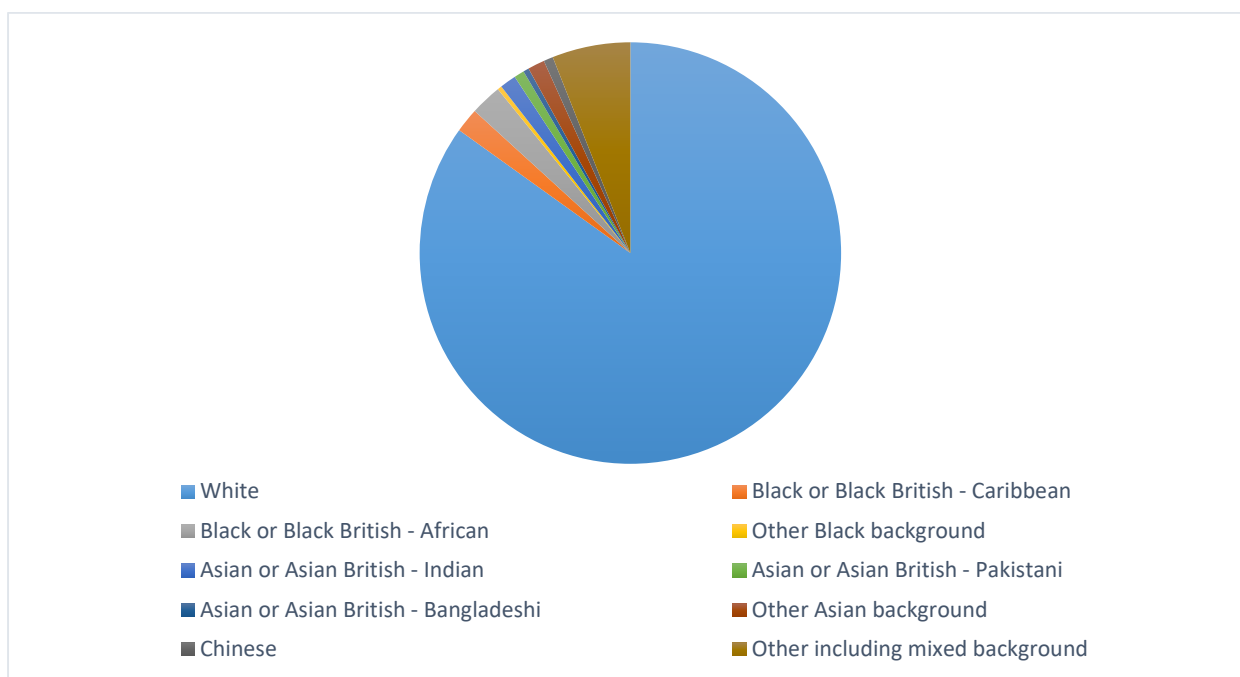
⁶⁶⁰ HEPI (2017) A crisis in the creative arts in the UK?

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 design⁶⁶⁴. 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 pupils⁶⁶⁵. 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 prospects⁶⁶⁶. 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 enols

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.

Creative Apprenticeships

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.

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.

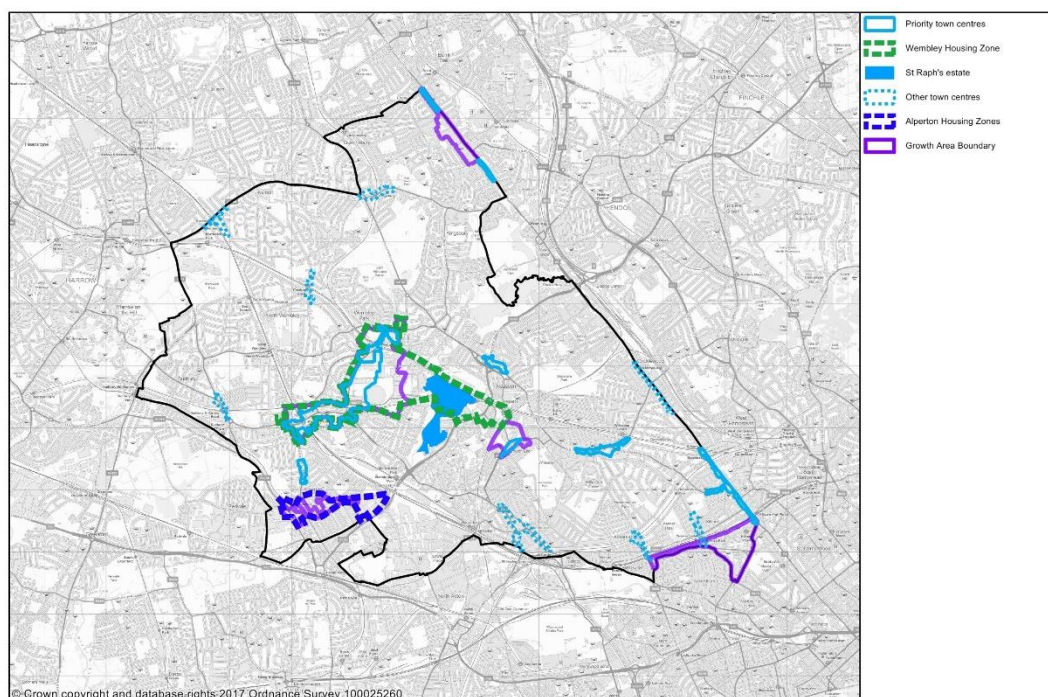
However, fewer organisations in 2017 were experimenting with digital technology than in 2013. The most reported barriers were lack of funds and staff time. It is telling that the four areas above consist of technology which has become easier to use or implement through innovations outside of the sectors 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 Brent⁶⁷⁶.

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

Major Projects

- 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.

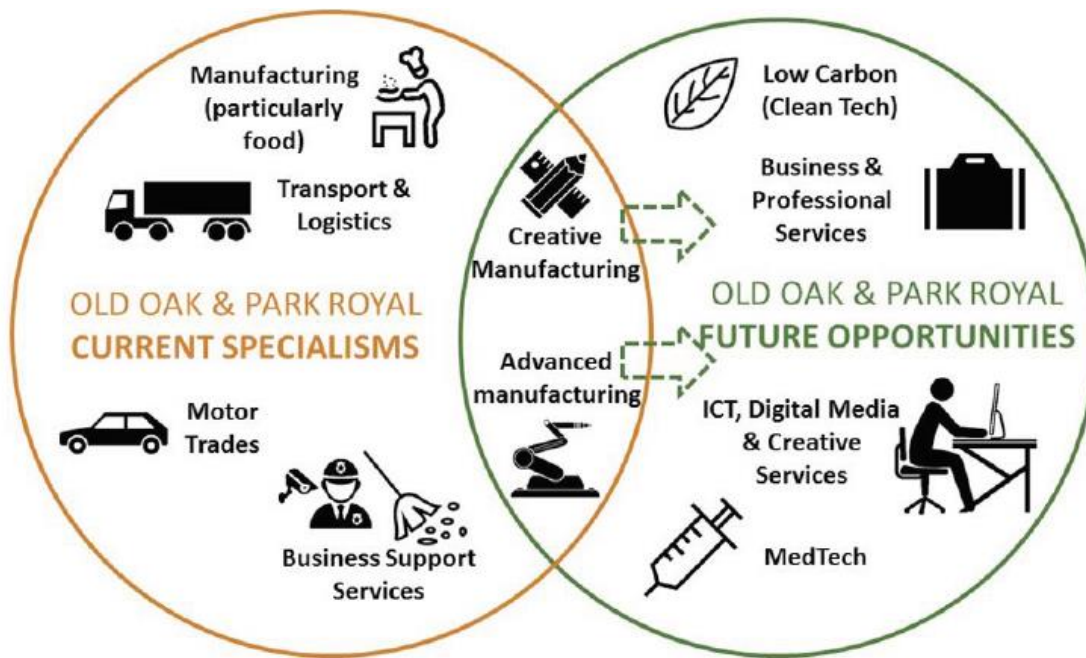
The draft OPDC Local Plan specifies that some sectors will need support to establish themselves, including access to micro and small, flexible/open or low cost workspaces.⁶⁷⁸ There are already a number of workshops and artist studios within the area and OPDC have committed to 'protecting and /or re-incorporating 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.

Night-time Economy

- *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 rates⁶⁸⁰. 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 general⁶⁸⁵⁶⁸⁶. 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 years⁶⁸⁹. 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 2041, 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

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 years⁷⁰⁹, 87% of highly creative occupations are considered to be at low risk of this⁷¹⁰.

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 Union⁷¹² 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

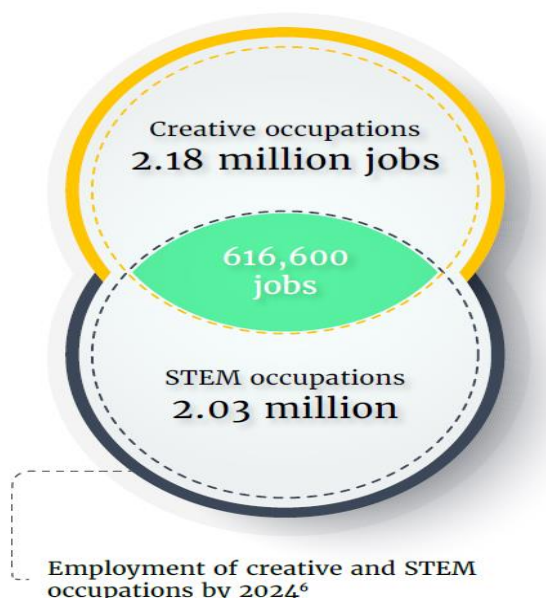
have “widespread, sustained and substantial opportunities...to make versions of culture” it has been shown that particular environmental conditions need to exist. Often being in the same room with others in a supportive social environment is crucial for people to realise their cultural capabilities. 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 studios⁷³⁶ and the Artists Studio Company (ASC) in Alperton includes 27 new affordable artist studios plus bench spaces⁷³⁷. 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 tea⁷⁴¹.

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

⁷⁴² My Max Card website

⁷⁴³ People's Palace Projects website

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