Building an Evidence Base, Paper 2:
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OUTCOMES RELATED TO PLACE: HOUNSLOW'S NATURAL, BUILT AND ECONOMIC RESILIENCE

INTRODUCTION

This paper offers a summary of the key issues and trends related to aspects of 'place' such as:

- The environment in which people live, work and play;
- The infrastructure that supports these activities; and
- The degree to which people and organisations feel safe and secure to thrive and grow.

For a place to be resilient it needs to be capable of withstanding stresses and shocks, only likely if relevant factors are healthy and preferably improving. This paper, therefore focusses on issues where this is not necessarily the case or where there are known uncertainties ahead by:

- Reviewing key trajectories and emerging issues in Hounslow;
- Identifying areas of risk and vulnerability; and
- Highlighting some of the key challenges and opportunities, which may affect outcomes for place as we plan for the next 20 years.

The paper should be read in conjunction with the Local Plan, Housing Needs Assessment and Local Economic Assessment amongst others.

ENVIRONMENT

Quick overview

- Hounslow has large amounts of green space, important for biodiversity and leisure activities but increasing development pressures will threaten them.
- Waste reduction and recycling remain a key area for action, with activity underway to increase rates of recycling
- Air quality is improving but we need to mitigate and prepare for more frequent extreme weather events resulting from climate change.

Biodiversity and green spaces

Hounslow is eighth in the list of London's leafiest boroughs and boasts 1,225 hectares of Green Belt and 1,123 hectares of open space. It is considered to be 39.6% 'green' when including private gardens, allotments and other undeveloped land, although this is slightly lower than the average for Outer London Boroughs (42.5%). Hounslow's waterways include the rivers Thames, Brent, Crane, and Londford River and canals.

There are 60 wildlife sites of national/local importance with the majority of sites of regional and borough-wide significance being to the west of the borough.

In the longer term, the pressures of housing need and economic development have the potential to threaten some open spaces. The Biodiversity Action Plan is aimed at ensuring the future of these spaces as they offer places for recreation, leisure, and escape from the intensity of urban living, all important factors in peoples' resilience. The proposal for a Greater London National Park City, if it gains traction, may be a further opportunity to secure and improve the quality and biodiversity of Hounslow's green heritage.

Waste

A key challenge to resilience is that of waste, be-it at a personal, community, organisational, or environmental level as it represents lost economic opportunities as well as indicating future threats of pollution and limiting resources. In Hounslow, **household waste** continues to creep slowly upwards (0.55 tonnes per household/0.2 tonnes per person in 2016) with **recycling levelling** at 34.5% and below the national average. The **growing population** places significant pressures on the removal and recycling of waste in the borough.

Air Quality and climate change

Total **carbon emissions** (per household) in Hounslow are 0.012 kT CO_2 (London average is 0.01 kT). Nonetheless, air quality is gradually improving and by 2030 land use and transport planning strategy will have produced a range of major and minor projects and decisions that will together mitigate and avoid some of the impacts arising from road vehicles and aviation.

In the longer term, the potential shift to **electric road vehicles** may result in a significant improvement in urban air quality. With the **Heathrow expansion**, Gross Noise and air pollution from planes passing over Hounslow may increase, however net improvements in air quality are possible, if abatement, aircraft and engine design, flight times and flight pathways are actively geared towards noise and pollution reduction.

Climate change means that extreme events such as **flooding and heatwaves** are likely to become more common in England which may result in peaks in damage to infrastructure or even excess deaths. The resilience of the borough will depend on the extent to which people and organisations put in place measures to mitigate the effects of such events and make plans to respond to them.

ECONOMY & BUSINESSES

Quick overview

- Hounslow has shown good economic growth and a significant business base growth.
- The business mix is varied, however, 100 companies employ 42% of the total workforce. Many self-employed and microbusiness tend to remain under the radar.
- There is concentration of jobs are in the ICT sector, and connected to the airport and the diversity of the business base may not be sufficient
- Strategic plans in place to attract inward investment
- Brexit, new technologies and changes in London or the Thames Valley have the potential to impact on the future of the borough's economy.

Hounslow is one of the capital's largest boroughs and one of largest economies in London covering 56 square kilometres. Hounslow town centre is designated as a Metropolitan Centre in the London Plan; Chiswick as a Major Centre; and Brentford and Feltham as important District Centres. There are also large neighbourhood centres in Hounslow West, Bedfont, Isleworth, Cranford, Hanworth, Heston and Old Isleworth, and 36 small neighbourhood centres.

Hounslow has exhibited **employment growth** of 12% between 2008 and 2013 as well as **business base growth of over 20%** between 2009 and 2014. The “Golden Mile” which is 2.4 miles in length, extends along the Great West Road (A4) from Gillette Corner to Chiswick Roundabout is a key area for economic growth.

The **business mix** in Hounslow is skewed towards businesses employing less than 20 employees which accounts for 9200 companies (93% of businesses). 1500 businesses employ between 20 and 250 people (6%) and 100 (1%) employ more than 250, although these larger businesses account for 42% of the workforce. Hounslow also has a significant business count of **self-employed and micro businesses** that fall under the radar that could double the official count.

As mentioned in Paper 1, the **employment rate** is strong at 74.2% which is higher than the London average (72.9%) and is expected to remain high compared to London and UK averages. Youth Unemployment is low at 2.9% compared to the 3.6% London average. There is currently a skills gap in Hounslow such that people living outside the borough with higher skills are more likely to gain employment in Hounslow. Research suggests that future rates of inward and outward commuting will have reduced compared to 2015 levels as more borough residents secure higher value employment within the borough or close by.

Hounslow has the second highest concentration of **ICT and digital jobs** in London with over half of those relating to software development and consulting (12,900 jobs). The number of businesses operating in ICT and digital activities in Hounslow increased by 51% between 2011 and 2014 and largely classify as micro, with 94% of firms employing between 0 and 4 people. This is an extremely high proportion of micro businesses compared with the average of 74.2% across Hounslow’s business base mentioned above.

The ICT sector is supported by a number of local assets including the cluster of TV broadcast channels and platform operators, with large employers in this sector in Hounslow, including Cisco Systems, IBM, SAP and EMC Computer Systems. Whilst the benefits of this sector are without question, from a resilience point of view, **over-reliance on one sector** will carry certain risks. Opportunities for alternative sector growth might also be found by looking to other key UK corporations and European and International Headquarters in Hounslow such as GlaxoSmithKline (GSK), JCDecaux, BP, Birds Eye Iglo, Lindt Chocolate and Fullers Brewery.

Through the **Regeneration and Economic Development Strategy**, partners are working proactively on projects and work streams to generate inward investment in the borough; retain and grow business, deliver sector development, particularly in creative, digital and technology, create more high quality jobs and provide a highly skilled workforce. More housing and some significant transport infrastructure developments (see below) are considered essential in creating the investment necessary to address and resolve the regeneration challenges in the borough

A number of strategic plans with the **potential to bring inward investment** will serve to bolster the regions resilience:

- **The London Plan:** This emphasises the rejuvenation of Feltham as a town centre and develop the borough's strategically important industrial offer. It commits the Mayor of London to work with Hounslow on a new Opportunity Area in the Great West Corridor.
- **Heathrow Opportunity Area**: This is one of the 38 opportunity areas and covers the west of the borough and Hillingdon. The area has an indicative employment capacity of 12,000 new jobs and a minimum 9,000 new homes.
- **Hounslow Infrastructure Delivery Plan (IDP) 2015 – 2030:** Developed to encapsulate the majority of the borough's significant infrastructure requirements across a range of sectors, the IDP is a living document and will be reviewed and updated regularly.
- **Hounslow Community Infrastructure Levy Charging Schedule:** Set by the Borough Council on 24 July 2015, the Council has been collecting funds through the Community Infrastructure Levy (CIL) to support necessary infrastructure from new developments.

Looking forward, **automation, artificial intelligence, robotics** and new innovations have the potential to change the nature of work, affect the types of job opportunities and demand new skills. These new technologies poses a challenge and opportunity for businesses in the borough and have the potential to shift the business base and the economy.

The **impact of Brexit** on the economy is uncertain. There is much debate on its effect on the availability of skills in the medium term and a potentially extended period of stagnation. The impact of Brexit on London and the Thames Valley, key drivers for Hounslow, may be quite different. Research indicates that the London economy may be 2-4 times less dependent than other parts of the UK suggesting it may be more resilient as the UK leaves the EU.

HOUSING

Quick overview
- Hounslow population is growing and there is an increasing demand for housing particularly family sized homes in the social housing sector.
- Despite efforts to increase the housing stock homelessness will remain a challenge.
- The number of private rental properties is increasing but safeguards will be needed to enable people to feel more secure and put down roots in the community.

There are 97,274 homes in the borough. Of these 35% are flats, 29% are semi-detached and 23% are terrace homes. Approximately half of households are home owners, single persons represent the highest proportion of householders in Hounslow (27%). Overall there is demand for more **family sized homes particularly in the social rented sector**. The Residents Survey indicated affordable housing was the third highest issue for residents.

There has been considerable growth in the **private rental sector** in Hounslow with 31% of the population in 2014 living in private rental property, higher than the London average (27%, the 9th highest out of 32 boroughs) and other outer London boroughs (25%). This has grown by approximately 67% since 2008 (32 600 people). When looking at the numbers of households in this sector, 26% rent from a private landlord (a 60% increase since 2008) above the London average (25%) and the outer London average (22%). This increase, good in terms of supply, also carries particular concerns such as lack of security of tenure, rent hikes and overcrowding (22% of households are classified as overcrowded in Hounslow) leading to insecurity and the inability of people to put down roots, threatening the resilience of these households.

It is predicted that between 2015 and 2030 over 12,300 net additional homes will have been completed to add to the stock of 98,000 (in 2011). Despite this, the number of households accepted as homeless and provided with temporary accommodation has increased from 331 in 2008/9 to 638 in 2012/13 an increase of 93%**.** Of these 472 (72%) had dependent children.

Looking forward, the aim is to maximise the **supply of housing** in the borough to meet housing need in a manner consistent with sustainable development principles and ensure major developments provide significant amounts of affordable housing.

Additionally, there is a need to encourage more **privately-rented homes** to help meet housing demand whilst at the same time strengthen regulation of private rented housing, and support those based in this sector who are either vulnerable or struggling. Also as the resident **population grows older** and greater amount of people survive into old age, there is a greater demand for housing that can be adapted for care and mobility requirements and suitable for accommodation for frail and disabled. Cold homes due to fuel poverty contribute to a range of health issues amongst elderly and vulnerable.

COMMUNITY SAFETY

Quick overview

- Although levels of crime are relatively low, certain types of crime have increased.
- Ambulance emergency response times are slowly worsening.
- More local influence of police resources will enable greater focus on key issues for Hounslow.
- New forms of crime such as cyber-crime will affect service response.

In Hounslow, crime rates (79.2/thousand population) are lower than the London (average of 84) but higher than outer London (average of 69.4). Since 2014/5, there has been a 105% increase in the number of **business crime reports**, a 13% increase in **sexual offences,** a 17% increase in **domestic abuse** offences and a 46% rise in number of reported **hate crimes**. Additionally the number of victims of serious **youth violence** has increased by 20% since 2015. **Fear of crime** remains proportionately higher than actual crime although peoples' fears are gradually becoming more realistic with 90% feeling safe in the daytime and 60% at night.

Hounslow sees less **fires** at 2.1 per thousand population (2014) than London (2.3) with response times staying at around 7 minutes. Ambulance incidents are running at 12.1 per hundred population (2014) lower than London (average 12.3), although, **ambulance response times** appear to have worsened with 72.2% Category A calls hitting their target response time in 12/13 down from 76.5% in 2007/8.

The **Community Safety Partnership** is developing a business crime partnership of businesses and retailers working together to reduce crime and anti-social behaviour. They are also leading Violence against Women Schemes, targeting road safety engineering and working in partnership to reduce youth crime.

Looking forward, there are **proposals to devolve** the gearing of police resources to local areas which may give partners greater influence to address local issues and be more responsive to emergent issues as well as raise **awareness and increase their involvement** in various initiatives. The growth in **cyber-crime** targeted at both the individual and commerce is becoming increasingly significant and will require unified partnership responses.

INFRASTRUCTURE AND TRANSPORT

Quick overview
• In Hounslow, car ownership is high and public accessibility is lower than London averages. • The transport strategy and changes in the Lane Rental Charges and street works management service may provide more opportunities to affect local modes of travel. • Supporting transport infrastructure is required to meet local demands.

The number of cars per household in Hounslow is on average higher than the London average. 16% of adults in Hounslow cycle at least once per month (2014/15) which is more than London as a whole (14.7%). However, Hounslow's **Average Public Transport Accessibility** score in 2014 was 3.0, which is poorer than that across London (3.8).

Looking forward the Borough's **Transport Strategy** aims to reduce car use, increase share of walking and cycling which will benefit from the support of partner organisations in providing facilities and incentive and raising awareness. It is also likely that the scope of the **Lane Rental Charge** will be extended, with the same powers being extended to London local authorities, and a new street works management service will provide more opportunities to affect modes of travel in Hounslow.

There are also major public transport infrastructure developments in the pipeline including:

- the Southall Crossrail link,
- the golden link between Hounslow and Willesden junction (linking to High Speed 2 and London Overground); and
- Southern Rail Access via Feltham and Bedfont to Heathrow Airport.

Hounslow will need to work with partners to secure investments to existing and future London underground, rail, bus and cycle services.

The growth in population and need for housing (see above) brings with it the need for supporting infrastructure such as schools, health facilities, community facilities, transport and ICT infrastructure. **Pressure on budgets** will require new and imaginative ways to provide these, making optimal use of available capacity in the **public and commercial sectors** and also taking advantage and meeting the new challenges of technologies such as **self-driving vehicles and drones**.

CONCLUSION

This paper focuses on those aspects of place that may have a bearing on the Natural, Built and Economic Resilience of Hounslow. Overall, the evidence suggests that Hounslow is becoming more resilient and whilst there are many issues of concern, these are generally acknowledged and are being addressed. Looking forward, the expansion of Heathrow, the move away from the internal combustion engine and the ways people access and connect with services and people connect will need to be embraced. The next 20 years, however, is going to be a period of exceptional uncertainty, unlike anything experienced in the recent past. The pace of technological change and our departure from the EU in particular make the future harder to predict than ever before. Hounslow's resilience will depend on the extent to which people and organisations are informed about and prepare for the challenges and opportunities of new technology and Brexit and have the capacity to manage the unexpected.