

## Place Shaping Waltham Forest

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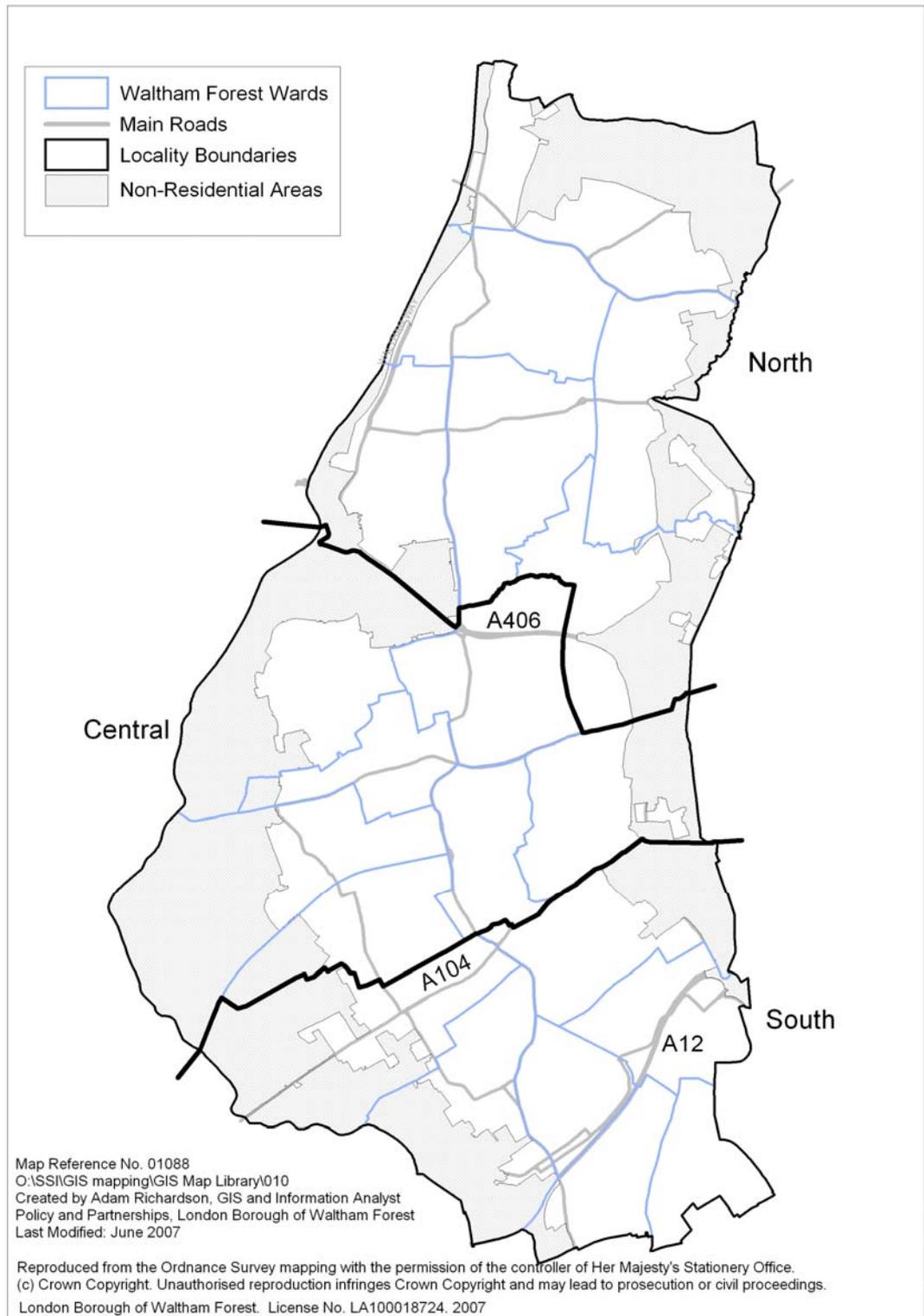
## **SECTION A: An Introduction to Waltham Forest and to Place Shaping**

### **The Borough of Waltham Forest**

- I Waltham Forest is an outer London Borough comprising 3,860 hectares (10,000 acres) with a population of 226,000. Chingford lies to the north of the borough, the central area is Walthamstow and to the south are the areas of Leyton and Leytonstone.
- II Where this report makes reference to the north, centre and south of the borough it is broadly referring to Chingford, Walthamstow and Leyton/Leytonstone. The map opposite this page delineates the 3 areas. The borough boundaries are with Epping Forest District Council to the north; the London Boroughs of Hackney and Newham to the south; Redbridge to the east and Enfield and Haringey to the west.
- III Waltham Forest is a part of the Upper and Lower Lea Valley Opportunity Areas and within the London – Stansted – Cambridge Corridor both of which offer potential economic, social and environmental benefits for the borough. Waltham Forest is also at the northern end of the Lower Lea Valley feeding into the Thames Gateway; and is one of the 5 Olympic boroughs hosting the London 2012 Games.
- IV Connectivity is a significant plus for those living, working or indeed visiting Waltham Forest. There are underground connections to Central London and Stratford via the central line at Leyton and Leytonstone and the west end is only 20 minutes away via the Victoria Line at Walthamstow Central and Blackhorse Road. Chingford and Higham Hill have rail access to Liverpool Street but no underground and unlike the remainder of the borough those areas in the north are not well served by bus routes.
- V In overall terms the borough is very well served for open space largely because of the Lea Valley Park on the western side of the borough including the two reservoirs and Epping Forest to the north and east.
- VI The majority of housing is Victorian and Leyton, Leytonstone and Walthamstow are dominated by Victorian terraces. But Waltham Forest does have later 20<sup>th</sup> century housing estates including some high rise blocks and there is a good deal of sought after post war housing in Chingford. There is variation in choice and cost from the smaller terraced properties in Leyton, to larger more expensive houses in north Leytonstone and then again the more modern housing in “suburban” Chingford including some detached and semi- detached. Walthamstow has a mix of its own including blocks of flats, small and large Victorian terraced properties, Warner flats and some large detached/semi-detached houses.

VII Waltham Forest is a small business economy dominated now by the service industry sector. A large proportion of the working population in Waltham Forest commute to the City and the West End.

Fig. 1: Map of Waltham Forest



## Place Shaping

- VIII “Place Shaping” is now seen by central government as the primary function of local government in its role of community leadership.
- IX Place Shaping is about clarifying an area’s distinctive identity. Some areas do have a clear identity which has been well thought through, is supported by evidence and is well marketed on that basis. But they are exceptional. Most, at best have clarified what sort of identity they want; whilst others have an identity they do not want; some places mean different things to different people; and some have no identity at all. Part of the place shaping process is to clarify what identity the area currently projects, what the preferred identity for the future is and shaping the place in that mould.
- X The duty of place shaping is essentially that local government should take responsibility for the well being of the area and its communities, reflecting its distinctive identity and promoting its interests and future prosperity. It involves a focus on developing the economic, social and environmental well-being of the local community and the local area. The responsibility therefore goes beyond the Council’s narrowly defined service responsibilities. In line with the modern role of local government reinforced and extended by the recent White Paper (“Strong and Prosperous Communities”) Councils are obliged to take a lead on place shaping but to facilitate the participation of key stakeholder partners (this would include broad engagement via the Local Strategic Partnership) both in defining the sense of place and in putting into effect the actions necessary to achieve it.

## The Task

- XI Waltham Forest Council appointed the consortium of Renaisi, Shared Intelligence and Hawkins Brown at the end of April 2007 to help us (the Local Strategic Partnership) develop a place shaping vision for the borough examining the issues and options for physical, economic and social change.
- XII The vision sought is for the next 10-20 years and to serve as a preparatory first stage towards the development of the Sustainable Community Strategy (SCS) and the Local Development Framework (LDF). (These will be the borough’s key policy and land use documents which will guide the shaping of Waltham Forest for the foreseeable future.) The intention is that the place shaping vision and evidence base will also feed into the ‘Issues and Options’ paper for the LDF Core Strategy.
- XIII The intention is that the end product of this place shaping exercise will facilitate the development of a vision for the borough that is robust and long-term with social, economic and environmental issues identified and reconciled rather than there being conflicting aspirations. The expectation is that, pending the development of the SCS and LDF, this more proactive and considered approach to place shaping will inform decisions on the development of resources (finance, staff and other assets) and help social policy to be viewed in spatial terms.

## Our Approach to the Task

XIV Our methodology has had three key stages:

- **Stage 1: Where we are now** – a baseline position produced by our consultants through desk top research into current social, economic and environmental factors, trends, policies and plans.
- **Stage 2: Key drivers of change** – a report that looked at the key social, economic and environmental pressures and trends including those that derive from regional, national and international policies and considerations; and which examined also the spatial dimension of the key drivers and the impact on connectivity. The report took into account evidence from 27 interviews with us as key stakeholders on an individual basis with the primary purpose of drawing out what for us are key drivers of change. The report facilitated the key debate about where Waltham Forest wants to be as a borough and the key issues in getting there.
- **Stage 3: The scenario workshops** – these workshops were used to review the stage 1 and 2 reports; build a shared understanding of the drivers of change in Waltham Forest; consider how the borough was likely to develop were we to carry on as we are; agree our preferred scenario for the future direction of Waltham Forest and what further work we needed to do in order to ensure that our preferred scenario could be achieved and embedded in our sustainable community strategy and our LDF core strategy.

## The “Where we are now” Exercise

XV The “Where we are now” section tells the current story of the borough in terms of the economic, social and environmental issues that appear to be relevant to the exercise of place shaping. For the most part we have relied on hard data collected from existing sources. We have however included some anecdotal evidence where it appears sufficiently important and relevant not to be omitted. We have not undertaken primary research but we have commented where we believe that is necessary and acknowledged relevant studies due to report in the near future.

XVI The “Where we are now” report is exactly that. Whilst reference is made in the document to very significant and influential developments such as the 2012 Olympic and Paralympic Games and Stratford City, they do not form a major focus for this section – we see these issues as “drivers for change” and their significance for place shaping is covered in that section of our report.

## **The “Key Drivers” Exercise**

XVII The key drivers of change section describes the main pressures and trends that will impact upon Waltham Forest over the next 10-20 years. The drivers are based on robustly forecast trends from available hard evidence. The choice of were researched by our consultants and those identified by us as stakeholders with expertise in our particular relevant fields.

## **The “Implications of Doing Nothing”**

XVIII During one of the scenario-planning workshops we spent time considering the multiple and wide ranging implications of failing to alter the direction of travel for Waltham Forest i.e. leaving the key drivers of change that develop from global, national and regional as well as local considerations, to dictate the future of Waltham Forest. We did also look at other scenarios. As it turned out the “do nothing” scenario turned out to be our “nightmare” scenario. It is described in Section D of this report.

## **The “Preferred Scenario”**

XIX We also developed at one of the workshops our preferred scenario. But before adopting it, we required some testing of key assumptions. The scenario vision is ambitious but achievable. It will result in 20 years time in a vastly improved borough and a much better quality of life for local people. But it is realistic in acknowledging that even then, there will be room for further improvement. The preferred scenario is described in Section E.

## **A Summary**

XX We have produced separately a short summary of this report, which will be specifically helpful and practical for consulting with a wider audience on this place shaping vision. That summary will not however include the essential hard evidence in this report which informs our choice vision for the future and why we have confidence that, ambitious though it is in looking forward to a much improved borough and quality of life, it is achievable. Anyone who feels the need to see that evidence should study this report.

## **SECTION B: Where we are now**

### **Contents**

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## Chapter 1: Our Community

1.1 This section describes the population profile of Waltham Forest today. The section also examines recent and current demographic trends in Waltham Forest. We also look into levels of deprivation and inequality across the borough. The chapter is split into:

- **Population profile of the borough**
- **The population: migration and churn in Waltham Forest**
- **Inequalities and deprivation within the borough**

## Population Profile

### Summary

1.2

- **Waltham Forest's population has been increasing since 1991 in line with London**
- **The population, in a similar pattern to London, is younger and more diverse than England and parts of London**
- **The north is older and less ethnically diverse whilst the south and centre are younger and more ethnically diverse**
- **Areas in the south and centre form part of a wider sub-regional 'arc of ethnic diversity' stretching from east to north east London**
- **There is limited information on other minority groups, such as people with disabilities.**
- **Community Cohesion is generally seen as a strength of the borough**

### In Detail

#### The Population of Waltham Forest

1.3 The population has been steadily increasing over the past twenty years as London has begun to grow. According to GLA high level population estimates, the population has grown by over 11,000 persons since 1991; this growth is line with the rest of London. The table below presents the borough's population changes over the past twenty-six years:

Fig 1: Population Growth in Waltham Forest

Year	Waltham Forest	London
1981	217,200	6,805,000
1991	215,900	6,829,300
2001	222,000	7,322,400
2005	224,100	7,457,000
2007	226,000	7,503,000

- 1.4 According to the GLA's '2006 Round' high level population estimate, there are 226,000 persons living in 93,000 households in Waltham Forest.
- 1.5 Information from ONS Mid-Year estimates (2001-2005) indicates that natural increases in population, some international migration were responsible for this growth. Migration from the rest of the borough to the rest of the UK has been a net loss for the borough.
- 1.6 The population is also set to expand over the next ten to twenty years due to rising birth rates, less deaths and more international migration. For details on future population changes, please see the 'key drivers of change' section.

**Age Structure of the Borough**

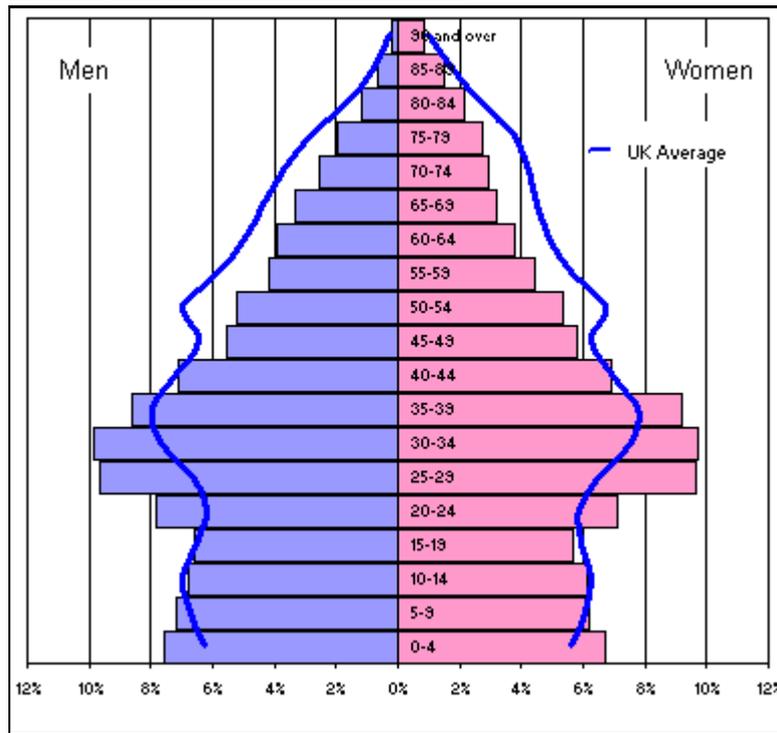
- 1.7 Like London, Waltham Forest has a higher proportion of people of working age than the rest of the UK. The table below, based on 2001 census, demonstrates that the borough is much closer in age profile to London rather than England.

Fig 2: Age Structure of Waltham Forest

Age	Waltham Forest (%)	London (%)	England (%)
0-24 Children & Young People	33.81	32.26	31.07
25-64 Working Age	54.50	55.31	53.05
65+ Older People	11.70	12.44	15.89

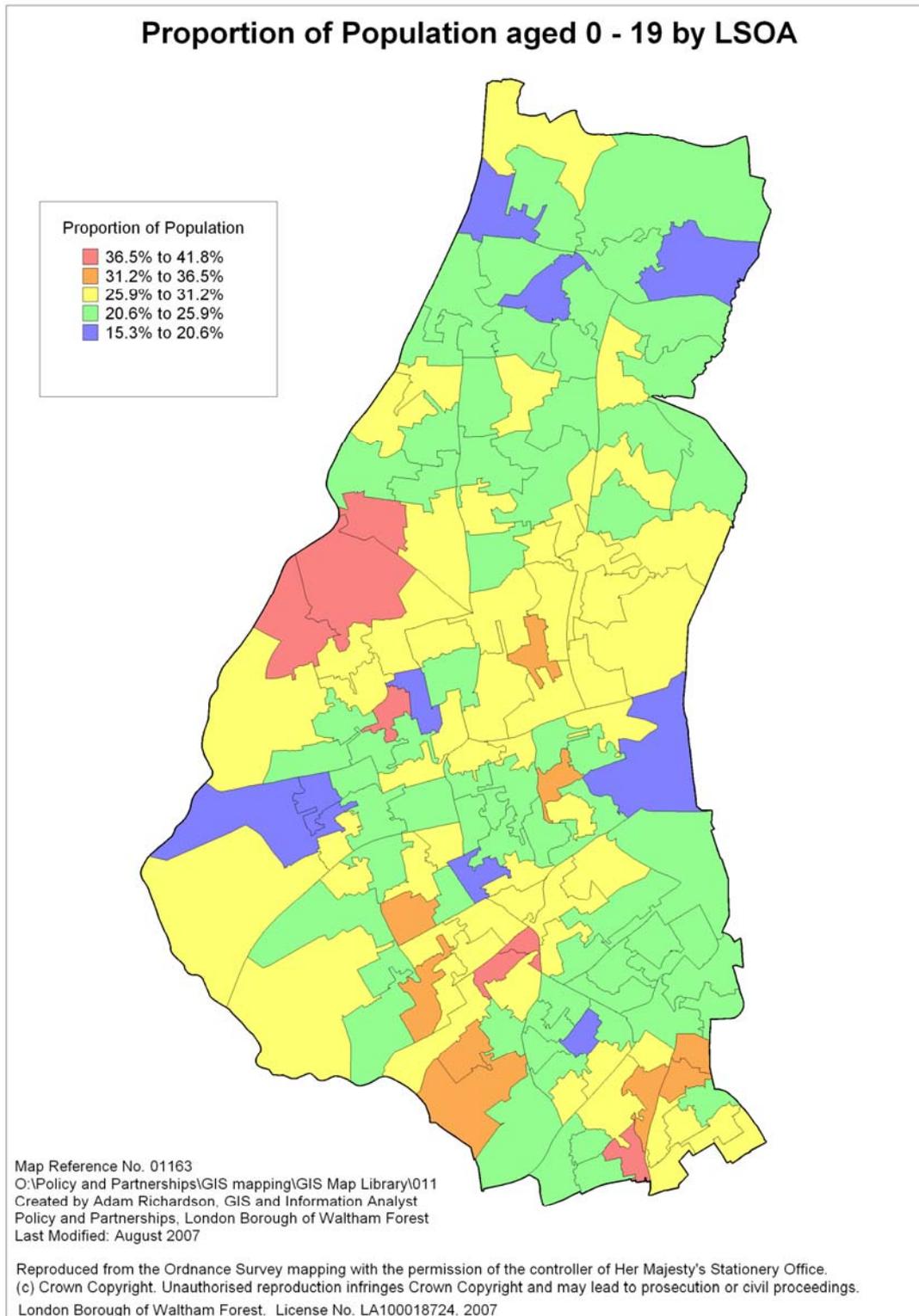
- 1.8 The population pyramid graph below describes its age profile in more detail against a UK comparison. The pyramid illustrates that Waltham Forest has more people of working age, particularly persons in the 20-39 years categories.

Fig 3: Age Pyramid of Waltham Forest



1.9 Different geographical areas of the borough have different age profiles. Importantly, the north of the borough is characterized by the highest average ages. The south and to some extent parts of the centre of the borough have a younger age profile. The map overleaf illustrates how young people are more concentrated in certain areas of the south and centre of the borough:

Fig 4: Age Structure of Waltham Forest by Geography



### Ethnicity in Waltham Forest

- 1.10 Waltham Forest has been following wider regional demographic trends. The proportion of Black, Asian Minority Ethnic (BAME) groups increased from 10%, in 1981, to more than a third in 2001. The table below presents the proportions of BAME groups in the borough, London and England:

Fig 5: BAME Groups in Waltham Forest

(2001 Census)	BAME Population (%)
Waltham Forest	35.51%
London	28.85%
England	9.08%

- 1.11 A more detailed breakdown reveals that the borough, in comparison to England and to some extent London, has a much higher proportion of people from a Black or Asian background:

Fig 6: Ethnic Groupings in Waltham Forest

Ethnic Grouping (2001 Census)	Waltham Forest (%)	London (%)	England (%)
White British	55.74	59.79	86.99
White Irish	2.34	3.07	1.27
Other White	6.41	8.29	2.66
Mixed race	3.55	3.16	1.31
Asian or Asian British	14.75	12.09	4.57
Black or Black British	15.42	10.91	2.30
Chinese	1.79	2.7	0.89
Other Ethnic Group	1.13	1.58	0.44

### Diversity amongst Young People

- 1.12 Waltham Forest's school aged children (aged 5-16) are far more diverse, in terms of ethnicity, compared to the total population. According to data from the 2001 Census and Pupil Level Annual School Census<sup>1</sup> (PLASC), the proportion of white British children has fallen from 50.8% to 41.2% from 2001 to 2006. The table below shows the changing ethnicity of the school age population in the borough:

<sup>1</sup> PLASC contains information about each pupil including name, UPN, ethnic code and other information

Fig 7: Changes in Ethnicity Among the 5-16 Cohort

<b>Ethnic Group</b>	<b>Census 2001 %</b>	<b>PLASC 2003 %</b>	<b>PLASC 2004 %</b>	<b>PLASC 2006 %</b>
<b>1. White</b>	50.8%	45.5%	44%	41.2%
<b><i>White British</i></b>	45.7%	36.0%	34%	30.2%
<b>White Irish</b>	0.8%	1.0%	1%	1.1%
<b>White Other</b>	4.3%	8.5%	9%	9.9%
<b>2. Black Caribbean</b>	9.0%	9.7%	9.8%	9.2%
<b>3. Black African</b>	7.6%	8.5%	9%	9.3%
<b>4. Black Other</b>	3.1%	2.9%	2.8%	3.0%
<b>5. Indian</b>	4.0%	3.8%	3.6%	3.3%
<b>6. Pakistani</b>	12.0%	14.3%	14.5%	15.3%
<b>7. Bangladeshi</b>	1.5%	1.6%	1.7%	1.8%
<b>8. Chinese</b>	0.4%	0.5%	0.5%	0.4%
<b>9. Other (inc Other Asian)</b>	3.8%	4.4%	2.7%	3.8%
<b>10. Dual Heritage</b>	7.8%	7.7%	8.1%	8.7%
<b>11. Not Known</b>	Data not available on all datasets			

1.13 Although comparisons of absolute figures between Census and PLASC data are difficult, due to inconsistent age bands, proportionate breakdowns offer a helpful comparison. These figures suggest that BAME groups have an increasing profile amongst the 5-16 cohort growing from in the region of 49% in 2001 to 55% in 2003.

### **The Geography of Ethnicity**

1.14 As the map overleaf illustrates, areas in the south and centre of the borough have a far higher proportion of people who are from a non-white British ethnicity/background. Some of these wards contain some of the highest proportions of ethnic diversity in London. Leyton, Lea Bridge and Cathall are in the top 50 most ethnically diverse wards in England under the 16 ethnic groups division.

1.15 Moreover, a recent GLA report claimed that these wards form part of a wider east to north east London 'arc of ethnic diversity' in London. The map below illustrates this pattern:

Fig 8: the Arc of Ethnic Diversity in East-North East London

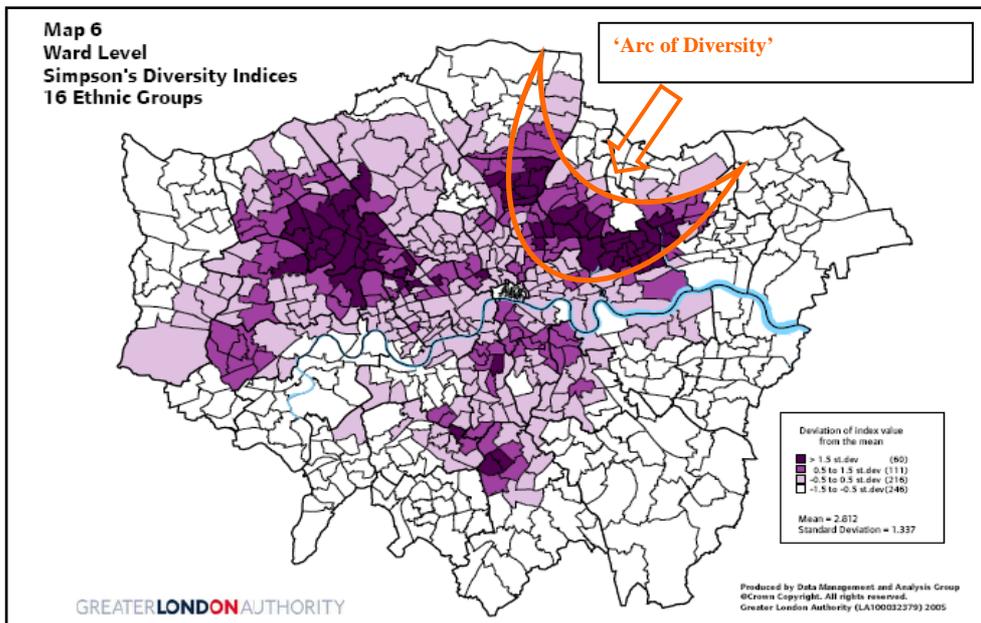
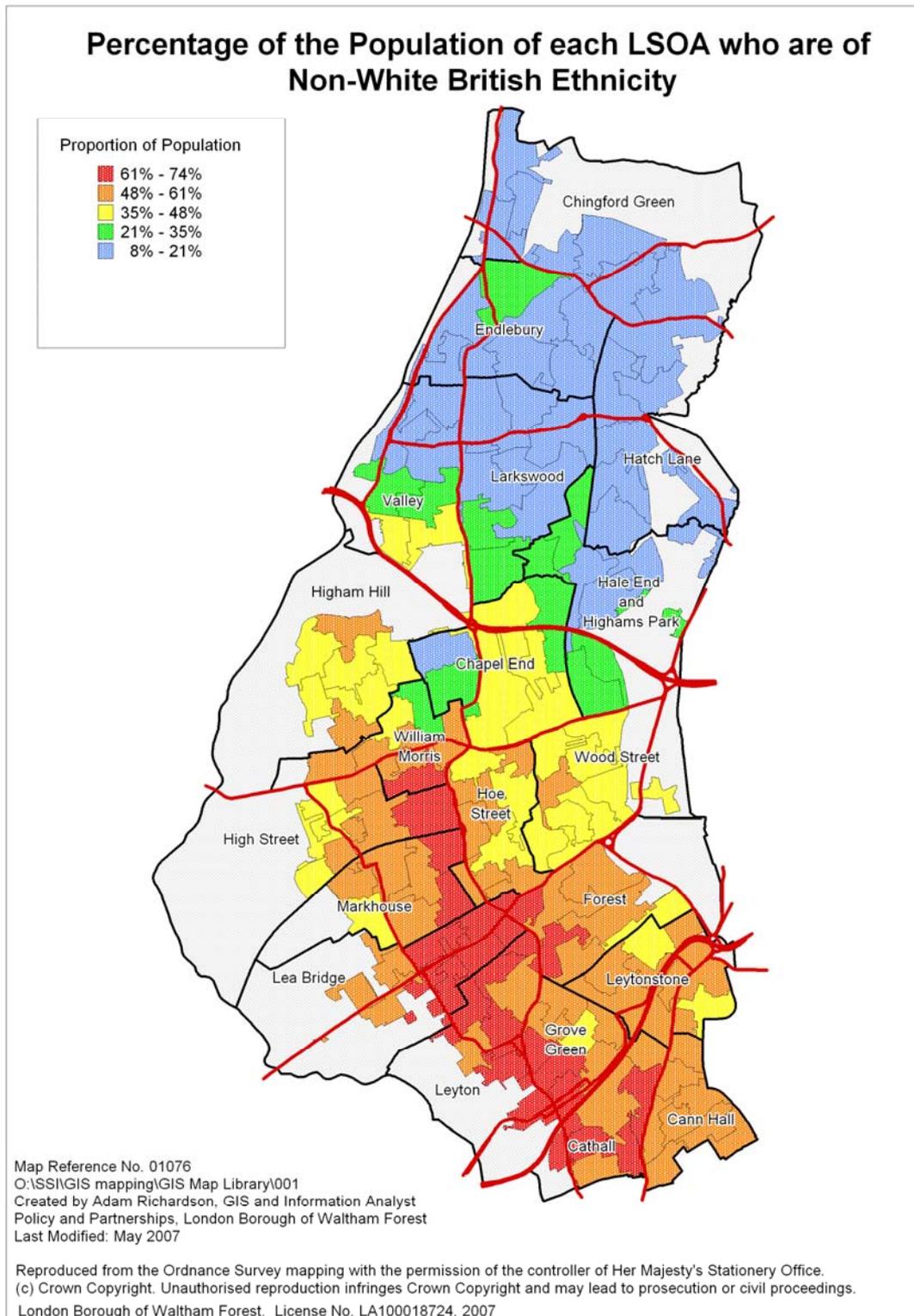


Fig 9: BAME People in Waltham Forest by Geography



## Religion

- 1.16 The borough also has a very diverse population in terms of its religious groups. The major difference compared to London as a whole is that the borough has a higher than average proportion of persons from a Muslim faith, as the census 2001 data outlines below, showing that just over 15% of LBWF's population are as Muslim as opposed compared to just over 8% for London:

Fig 10: Religion in Waltham Forest

People stating religion as:	LBWF	London	England
Christian	56.8	58.23	71.74
Buddhist	0.44	0.76	0.28
Hindu	1.83	4.07	1.11
Jewish	0.66	2.09	0.52
Muslim	15.07	8.46	3.10
Sikh	0.57	1.45	0.67
Other religions	0.39	0.51	0.29
No religion	15.36	15.76	14.59
Not stated	8.89	8.66	7.69

## People with disabilities

- 1.17 According to the London Development Agency (2006), there are no absolute answers about how many people with a disability there are in Waltham Forest. There is limited information at borough level in relation to disability. However, the 'London and Sub-Regional Strategy Support Studies' found that in 2005 an estimated 13% of London's households contain at least one person who is frail elderly, physically disabled or has a learning disability, mental health problem or severe sensory disability. This could translate into 12,129 households, in Waltham Forest, having at least one disabled person in their household.
- 1.18 According to the Council's 'Disability Equality Scheme', 25,000 people of working age have a disability in Waltham Forest. The table below presents the findings of this scheme:

Fig 11: Disability in Waltham Forest

Type of Disability	No. of People in Waltham Forest (Approx)
Sensory/Visual	8,250
Health problems relating to blood and circulation	8,250
Other (Not Known)	8,500

- 1.19 746 pupils in Waltham Forest are registered as 'disabled pupils' which works out to be 2% of all pupils. The existing evidence does not inform us that there are any significant variations according to ethnic group or geography.

## Asylum Seekers

- 1.20 Waltham Forest, in comparison to other London Boroughs, does not contain a large number of Asylum seekers. At the last count it had the 12<sup>th</sup> highest number of Asylum seekers with 172 people in total. The table below compares Waltham Forest with the 5 London boroughs that have the highest number of asylum seekers:

Fig 12: Asylum Seekers Across London

Asylum Seeker Figures (May 2007)	
Borough	Total Asylum Seekers
Croydon	1,206
Hillingdon	1,080
Haringey	315
Newham	261
Lambeth	255
Waltham Forest	172

## Community Cohesion

- 1.21 Waltham Forest is made up of strong cohesive communities. In the light of increasing ethnic diversity, social cohesion is a great strength of the borough. 76% of respondents in the Best Value Performance Indicator Survey 2006/7 (BVPI) stated that they thought that Waltham Forest was a place where people from different backgrounds 'got on well together'. This is in line with the London average, as a whole, and slightly better than the outer London average of 74%. Anecdotally, the borough is known to be a relatively tension-free place, which was demonstrated by the lack of incidents following the arrests last year in relation to allegations of terrorism.

## The Population: migration and churn

### Summary

1.22

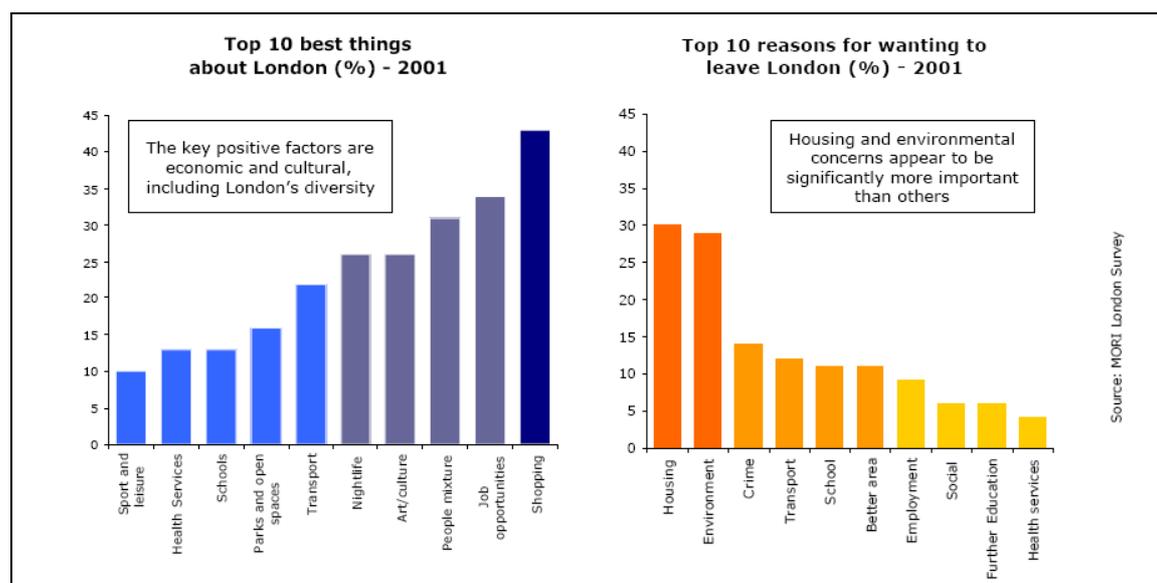
- **Higher and middle income families are moving out of the borough to neighbouring suburban boroughs in London and the south east.**
- **First time buying couples, families and young single people are moving into the borough from London and the rest of the world.**
- **There is a high population churn amongst persons living in the south and centre of the borough living in private rented accommodation**
- **The borough is increasingly a gateway into London for international migrant groups**

## In Detail

### Key factors affecting the decision to stay or leave

- 1.23 Most research, such as that carried out by the Joseph Rowntree Foundation, claims that providing the right sort of housing at the right price is crucial to retaining people<sup>2</sup>. Cleaner, safer and greener streets and public spaces with low levels of crime are also cited as an important factor in retaining people<sup>3</sup>. Schools and neighbourhood facilities can be considerations for people making decisions about moving within or outside an area<sup>4</sup>. Although culture, nightlife, shopping and entertainment are important concerns, they relate more to the city-region of London rather than just the local level.
- 1.24 The London Report outlines the best things about London<sup>5</sup>. Unsurprisingly, shopping, jobs and the cultural mix of London rank as the top three. Environmental problems, housing and crime are rated as the top three concerns about living in London.

Fig 13: The Best and Worst Things About London Life



### Movement within the borough

- 1.25 The borough had the 5<sup>th</sup> highest rate of internal migration within the borough. Information taken from the 2000-01 census snapshot, presented below, indicates that 5% of the population moved within the borough in that year:

<sup>2</sup> Joseph Rowntree Foundation 'mixed income communities' (2005)

<sup>3</sup> Greater London Enterprise (2005)

<sup>4</sup> Joseph Rowntree Foundation 'mixed income communities' (2005)

<sup>5</sup> Prime Minister's Strategy Unit 'London Report' (2004)

Fig 14: the Highest Rates of Internal Movement Within London Boroughs

<b>The Highest rates of Internal Movement within London Boroughs</b>			
	<b>Persons moving within their Borough</b>	<b>% of Persons moving within their Borough</b>	<b>Rank</b>
<b>Wandsworth</b>	16,508	6.3%	1
<b>Kingston upon Thames</b>	8,321	5.7%	2
<b>Camden</b>	10,970	5.5%	3
<b>Croydon</b>	17,786	5.4%	4
<b>Waltham Forest</b>	11,501	5.3%	5

- 1.26 The table below outlines that the highest rates of churn were in the south and centre of Waltham Forest in 2003/04. It implies that there are actually 20% more people moving out of the borough than moving in and that is all down to the centre and the south of the borough where the figure is closer to 30%. Population growth is therefore the result of higher birth rates and longer lives.

Fig 15: Churn in Waltham Forest

	<b>All Persons 03-04 inflow per 1,000 popn</b>	<b>All Persons 03-04 outflow per 1,000 popn</b>	<b>All Persons 03-04 diff Per 1,000 popn</b>
North	77.4	77.5	-0.1
Middle	90.7	117.7	-27.0
South	92.5	122.3	-29.8
Borough	87.5	107.9	-20.3 <sup>6</sup>

### Movement into and out of the borough

- 1.27 Census information below profiles the movements of people into and out of the borough in 2000-01:

Fig 16: Population Inflows and Outflows

	<b>Inflow</b>	<b>Outflow</b>
London	11,391	13,268
UK	181	208
International	2,318	Not available

- 1.28 Data from GP registrations can provide a more detailed picture on where people are moving in from within the UK, and where they are moving out to. Registration data from 1999-2005 indicates that the **major population influxes** were from Newham, Hackney, Haringey, Tower Hamlets, Islington and Enfield. The **major outflows** were

<sup>6</sup> ONS Census Information

to Redbridge, Newham, Barking and Dagenham, Enfield and Hackney. The table below gives the London-wide patterns of migration to and from Waltham Forest:

Fig 17: GP Registrations To and From Waltham Forest

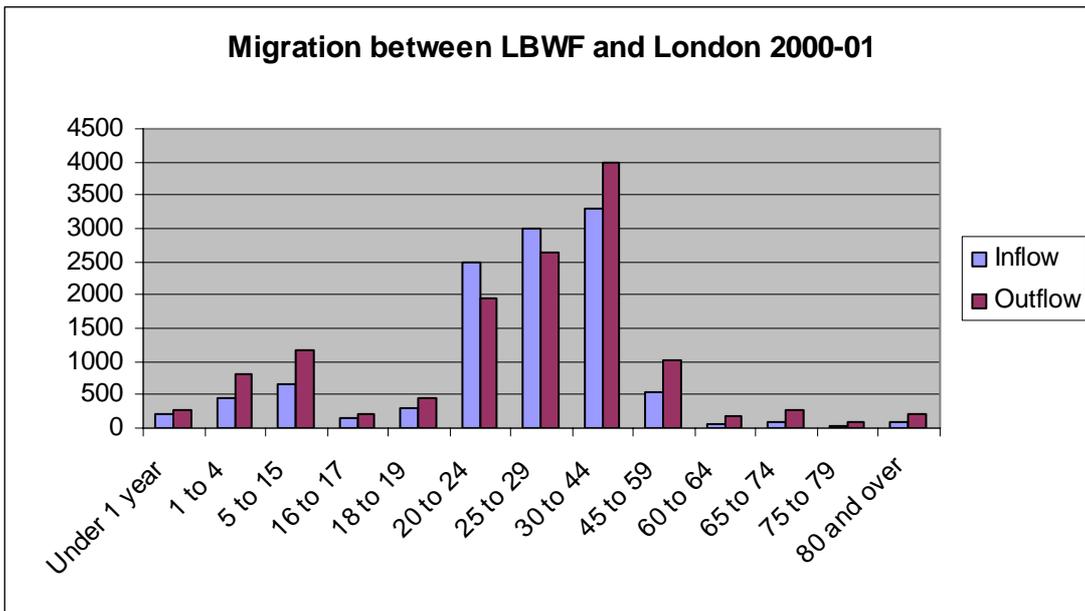
<b>GP Registrations 1999-2005</b>			
	<b>Total 1999-2005</b>	<b>Total 1999-2005</b>	<b>Total 1999-2005</b>
Camden	1,650	1,020	630
City of London	60	80	-20
Hackney	8,040	3,310	4,730
Hammersmith and Fulham	780	500	280
Haringey	5,130	2,750	2,380
Islington	3,210	1,470	1,740
Kensington and Chelsea	550	410	140
Lambeth	1,770	1,300	470
Lewisham	990	1,140	-150
Newham	7,100	7,670	-570
Southwark	1,340	1,250	90
Tower Hamlets	3,170	2,120	1,050
Wandsworth	1,010	890	120
Westminster	1,270	920	350
Barking and Dagenham	1,230	3,360	-2,130
Barnet	1,410	1,360	50
Bexley	170	490	-320
Brent	1,710	1,080	630
Bromley	340	530	-190
Croydon	570	660	-90
Ealing	1,010	1,000	10
Enfield	3,190	3,150	40
Greenwich	580	980	-400
Harrow	360	560	-200
Havering	720	2,480	-1,760
Hillingdon	330	500	-170
Hounslow	410	590	-180
Kingston upon Thames	220	330	-110
Merton	380	470	-90
Redbridge	5,610	12,170	-6,560
Richmond upon Thames	230	310	-80
Sutton	110	240	-130

- 1.29 Information taken from National Insurance Number registrations, within a GLA report, indicate that the major international migrant groups arriving in the borough - between 2002 and 2006 - were from Eastern Europe with significant numbers also from South Africa and Pakistan.

### Migration by age and household

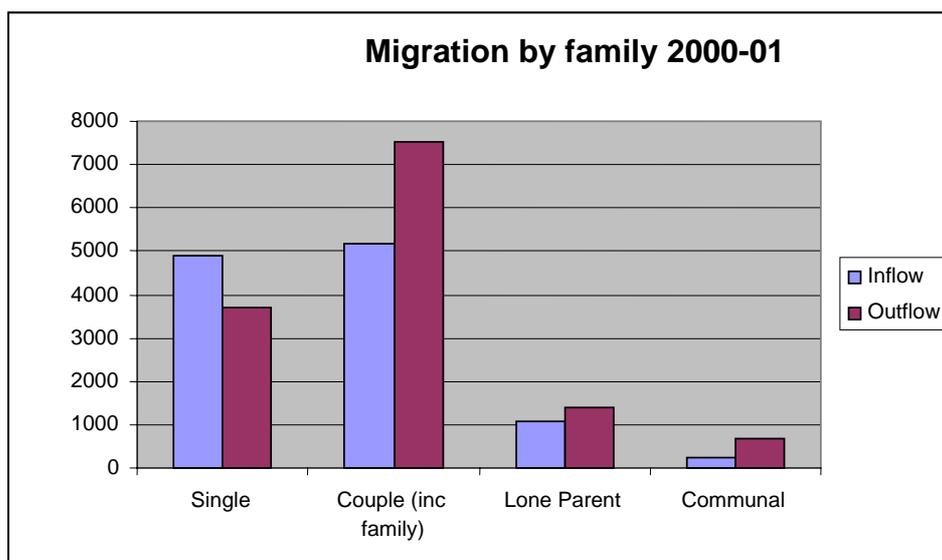
- 1.30 Using the same data from the 2000-01 census snapshot it is possible to understand what ages and households are moving into and out of the borough. During 2000-01 the largest movements of people in and out of the borough were those aged 20 to 44 years.
- 1.31 Young people aged between 1 to 15 years were also a major group to move in and out of the borough. The biggest outflow was people aged 30-44: 4,000 of these 30-44 year olds left the borough and 3,295 of these entered the borough.

Fig 18: Migration By Age 2000-01



- 1.32 Analysing the data in terms of households, the **biggest net influx** was **single people** and the **biggest outflow** were **couples with and without children**. In fact couples, with or without children, were the biggest group to move in and out of the borough. Overall, there was a slight net loss of this group. Lone parents were the most static excluding communal establishments. The graph below illustrates migration between the borough and London:

Fig 19: Migration by Family 2000-01



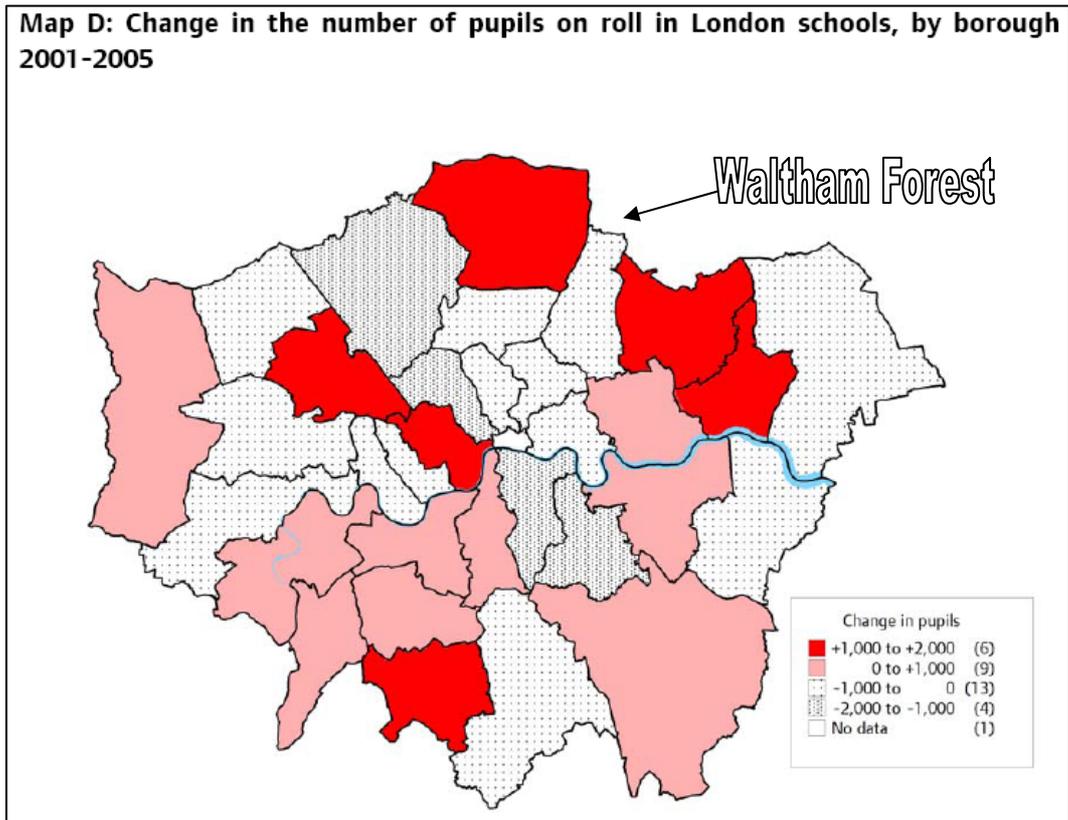
1.33 Data taken from school admissions (2001-05) indicates a slight net loss of families from the borough. School admissions data from 2001-05 indicates that the borough incurred an overall net loss of 70 children from its Local Authority maintained schools. This is surprising for an outer London borough. Overall outer London gained 480 pupils and inner London lost 3,620 pupils. Neighbouring outer London boroughs, such as Redbridge, gained pupils and most inner London boroughs, such as Hackney, lost pupils as the table below confirm:

Fig 20: Pupil Change in LA Maintained Schools

Borough	Pupil Change in LA Maintained Schools (2001-2005)
Redbridge	1,490
Enfield	1,550
Hackney	-490
Haringey	-580

1.34 The map below demonstrates the change in the number of pupils across London boroughs. The boroughs highlighted in red have gained 1,000 to 2,000 pupils and pink areas have gained 0 to 1,000 pupils.

Fig 21: Change in the Number of Pupils on Roll in London Schools



1.35 The data would suggest that some families are moving out of the borough into Redbridge. However, this data only suggests this pattern and does not confirm it.

### Migration by Socio-Economic Grouping

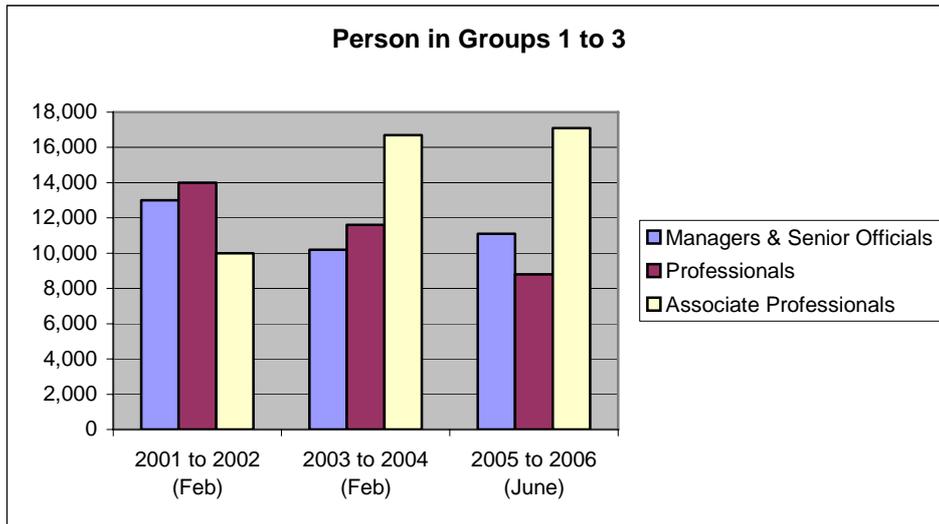
1.36 The rate of economically active people, during 2000-01, moving in and out of the borough was **roughly equal**. In fact the borough enjoyed a small net gain of people employed full time. The table below details these patterns during 2000-01.

Fig 22: Migration by Socio-Economic Grouping

<b>Economically active</b>	<b>8,137</b>	<b>7,996</b>	<b>141</b>
Employee - part-time	493	677	-184
Employee - full-time	5,757	5,488	269
Self-employed - part-time	158	191	-33
Self-employed - full-time	555	560	-5
Unemployed	540	562	-22
Full-time student	634	518	116
<b>Economically inactive</b>	<b>1,818</b>	<b>2,733</b>	<b>-915</b>
Retired	124	403	-279
Student	735	938	-203
Looking after home/family	381	685	-304
Permanently sick or disabled	176	248	-72
Other	402	459	-57
<b>Not aged 16 to 74</b>	<b>1,436</b>	<b>2,539</b>	<b>-1103</b>

1.37 However, data taken from the Labour Force Survey on socio-economic groupings major groups 1-3 suggests that managers, senior officials and professionally employed people have been proportionally leaving the borough. The largest decline was in professionals and, conversely, associate professionals have risen as the graph below demonstrates:

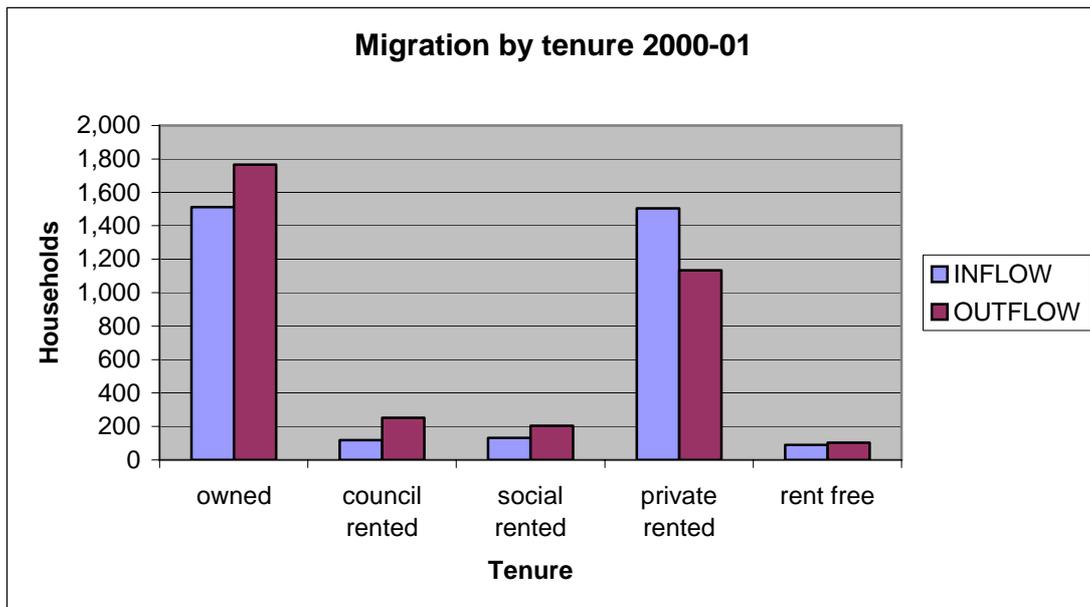
Figure 23: Changes in Waltham Forest's Socio-Economic Structure



### Migration by tenure

1.38 The number of migrant households amongst owner-occupiers and private renters is **substantially higher than those in social housing**. The graph below illustrates these characteristics:

Figure 24: Migration by Tenure

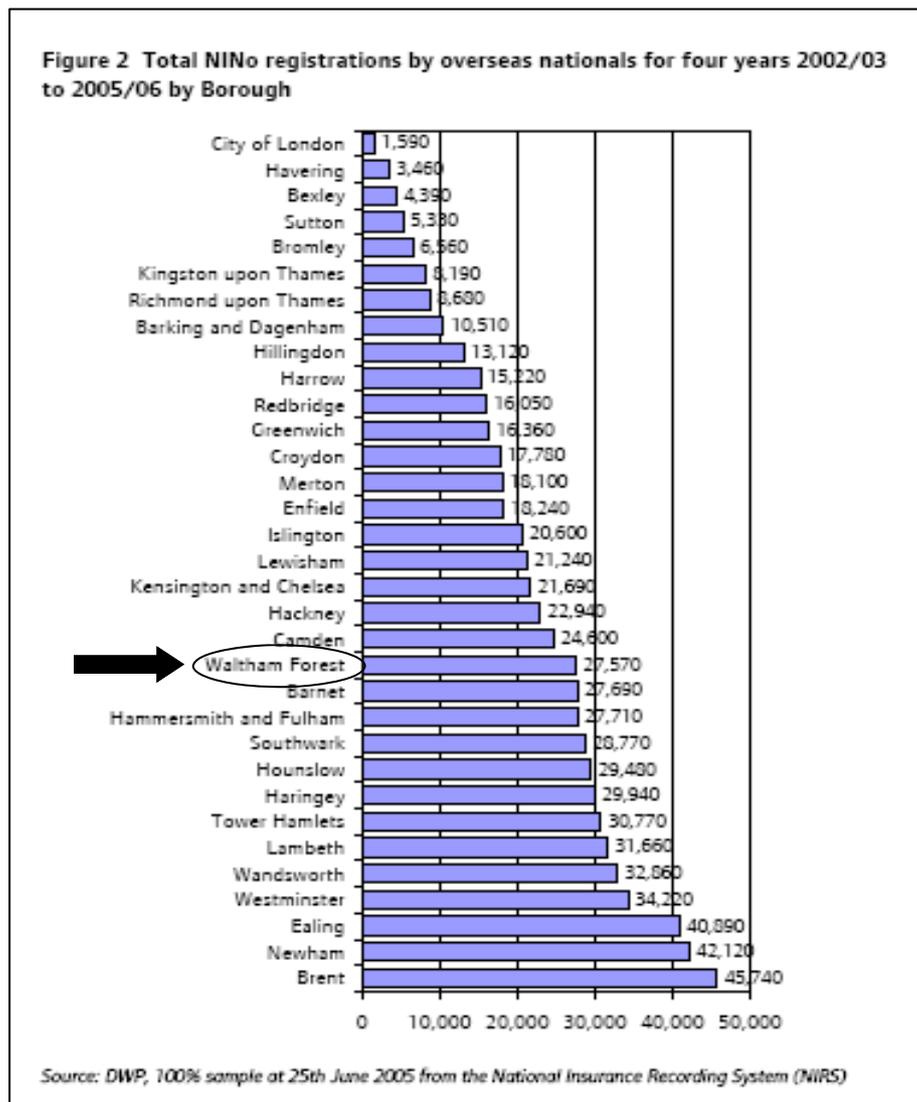


1.39 Moreover, the proportion of **migrant private sector rental households** to private households is much higher than it is for owner-occupied households. Although the private rental market made up 17.5% of all households in the borough in 2001, it **constituted 39% of all households moving in and out** of the borough. This indicates that persons living in the private rental sector have a higher rate of population churn and movement.

### International Migration

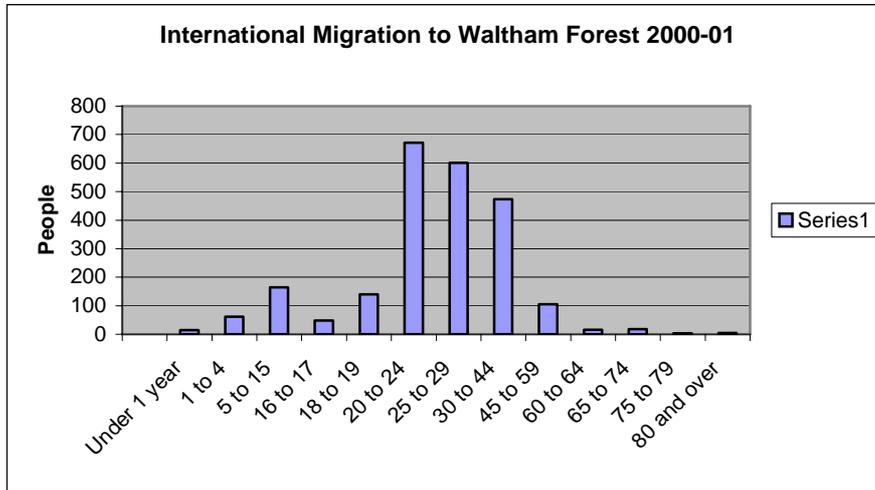
1.40 International migration is fraught with the most difficulties due to a lack of robust data. However National Insurance number registrations, taken from existing GLA research, indicate that there were 27,570 overseas national insurance registrations from 2002/03 to 2005/06 in Waltham Forest. This was the 13<sup>th</sup> highest in London. However, the borough had the 2<sup>nd</sup> largest increase in registrations per annum behind Ealing: **Waltham Forest had a 97% increase in registrations per annum between 2002/03 and 2005/06**. The figure below gives the comparison between Waltham Forest and the rest of London:

Fig 25: National Insurance Number Registrations in London



1.41 Information from the 2000-01 census reveals that most international migrants are aged between 20 and 44 years. Specifically, the largest group was aged 20-24:

Fig 26: International Migration in Waltham Forest



1.42 These conclusions about international migration to Waltham Forest are not definitive. A further bespoke study would be required to validate these conclusions beyond dispute.

## Inequalities and Deprivation within Waltham Forest

### Summary

1.43

- **Inequality and deprivation are more concentrated and focused in the parts of the south and centre of the borough.**
- **BAME communities tend to live in the most deprived geographic areas and, therefore, will suffer higher levels of deprivation than members of the white community who are more likely to live in comparatively affluent wards.**

### In Detail

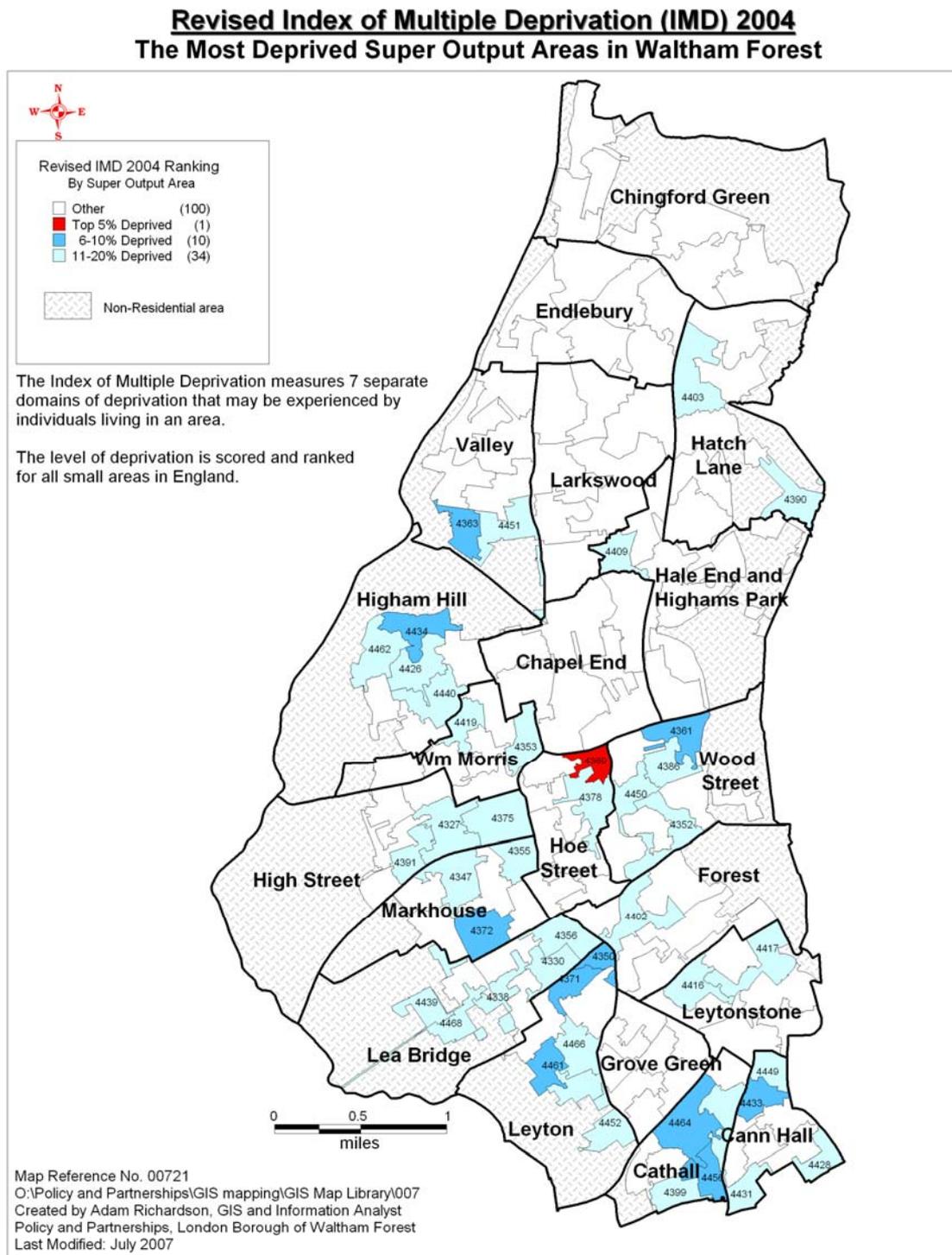
#### Inequality and Deprivation in Waltham Forest

1.44 Waltham Forest, as like other London boroughs and urban centres, experiences inequalities amongst certain groups and people living in certain areas.

The revised index of multiple deprivation (2004), based on a variety of social, economic and environmental benchmarks, indicates that areas in the south and parts of the centre are more deprived than areas in the north of the borough. The map overleaf illustrates that there are relatively few super output areas in the 20% most

deprived areas in the north of the borough, whereas there is a far higher number in the south

Fig 27: Inequality By Geography in Waltham Forest



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## Health Issues in Waltham Forest

- 1.45 The table below provides an overview of how Waltham Forest compares to London and the rest of the country on some key health issues:

Fig.28: Health Issues in Waltham Forest

Health Issue	LBWF	London	England
Life Expectancy Females (years)	80.3	81.4	81.1
Life Expectancy Males (years)	75.4	76.9	76.9
Coronary Heart Disease (Standardised Mortality Ratio)	99.1	94	100
Circulatory Disease (per 100,000)	113.6	96.8	90.4
Cancer (per 100,000)	117.4	116.9	119.0
Tuberculosis (Notification rate per 100,000)	52.2	46.3	14.7
Infant Mortality (per 1,000 live births)	5.7	5.2	5.1
Teenage Pregnancy (per 1,000 females aged 15-17)	47.70	44.60	41.10
Sexually Transmitted Diseases (per 100,000)	158	177	137
HIV Infection Rate (per 100,000)	252.8	278.3	77.4
Diabetes (% of the population)	4.37	4.37	4.4
Asthma (per 100,000)	125	126	126
Smoking (% of people)	30	22	31

### Life Expectancy

- 1.46 Information taken from the London Health Observatory, establishes that life expectancy is lower in the borough than in the rest of London and England. Life expectancy is lower in the centre and south of the borough. In short, you are more likely to live longer if you live in the north of the borough. The table below shows that life expectancy for men is three years less in the south than the north of the borough.

Fig 29: Life Expectancy in Waltham Forest

<b>Life Expectancy 2000-04 (years)</b>		
<b>Area</b>	<b>Male</b>	<b>Female</b>
North	76.32	80.63
Centre	74.13	79.87
South	73.89	79.06
Waltham Forest	74.73	79.73
London	76.08	80.87
England	76.32	80.76

### Coronary Heart Disease and Circulatory Disease

1.47 Coronary heart disease and circulatory heart disease is higher in Waltham Forest than it is across London. Rates of these diseases are also higher in the south and centre of the borough than they are in the north of the borough. For coronary heart disease this is unsurprising as it tends to be higher in more deprived areas and affects Asian men and Pakistani females who are more concentrated in the south and centre of the borough.

Fig 30: Coronary Heart Disease and Circulatory Disease in Waltham Forest

<b>Area</b>	<b>Coronary Heart Disease 2000-04 (Standardised Mortality Ratio)</b>	<b>Circulatory Disease 2000-04 (Standardised Mortality Ratio)</b>
North	110	102
Centre	127.7	125.5
South	139.9	124.5
Waltham Forest	120.9	111.6

### Tuberculosis

1.48 Rates of tuberculosis infection are higher in Waltham Forest than they are in both London and England. The rates are thought to be attributable to the higher than average numbers of international migrants in some cases and poor living conditions that persist in parts of the centre and south.

### Teenage Pregnancy

1.49 Rates of teenage pregnancy are marginally higher in the borough than they are in London, and significantly higher in the south and centre of the borough. The table below demonstrates the contrast:

Fig 31: Teenage Pregnancy in Waltham Forest

Area	Teenage Pregnancy Rate (per 1,000 females aged 15-17)
North	43.3
Centre	61.6
South	64
Waltham Forest	57.1
London	50.9

### Sexually Transmitted Diseases

- 1.50 Rates of sexually transmitted diseases are higher in London and Waltham Forest than they are in the rest of England. This is unsurprising given the much younger, international and more diverse population profile of London compared to England. A more worrying health inequality is over HIV infection rates per 100,000 people. Black African and Caribbean people make up 54% of HIV infected people, in Waltham Forest, but this cohort only makes up 15% of the total population.

### Health Infrastructure

- 1.51 At present the borough is in line with the national average for the number of patients per GP.

Fig.32: GPs per 100,000 in London

PCT	No. of GPs per 100,000
Waltham Forest	57
Barking and Dagenham	45
Enfield	58
Newham	63
Redbridge	51
<b>England</b>	<b>57</b>

- 1.52 Waltham Forest houses Whipps Cross University Hospital, one the major teaching hospitals in London offering A & E services and an extensive range of health facilities.

### Education Issues in Waltham Forest

- 1.53 The table below provides a short comparison of educational performance in the borough in 2006 as against London and England:

Fig 33: Educational Attainment in Waltham Forest

Education Issue (by Pupil)	LBWF %	London %	England %
Key Stage 2- Maths	72.3	76.1	79.3
Key Stage 2- English	80.9	86.2	86.2
Key Stage 3- Maths	68.0	71.0	74.0
Key Stage 3- English	75.0	74.0	74.0
Key Stage 3- Science	61.0	65.0	70.0
5 GCSE's A*-C (Key Stage 4)	53.1	57.9	58.5

- 1.54 The borough is behind London and England on most educational indicators. However, the rate of improvement suggests that Waltham Forest is closing the attainment gap in most areas. The big exception is in GCSE results.

Fig 34: Rate of Educational Improvement in Waltham Forest

Rate of Improvement 1997-2005			
Education Issue (by Pupil)	LBWF %	London %	England %
Key Stage 2- Maths	21	20	17
Key Stage 2- English	17	17	14
Key Stage 3- Maths	17	15	19
Key Stage 3- English	17	12	9
Key Stage 3- Science	14	16	14
5 GCSE's A*-C (Key Stage 4)	11	15.9	12.2

### GCSE Results- Key Stage 4

- 1.55 The attainment gap at GCSE level between the borough and the rest of the country is the most significant despite the fact that in 2006 over 50% of Waltham Forest pupil's attained five GCSEs at A – C grades for the first time. The percentage of pupils obtaining 5 A – C GCSEs is higher in the north than it is in south and parts of the centre. The selection of wards, in the table below, illustrates this trend with for instance pupils in Higham Hill, in the centre, achieving 35.67% and those in Hatch Lane, in the north, obtaining 59.31%.

Fig 35: GCSE Results at Ward Level in Waltham Forest

Ward Name <sup>7</sup>	% Pupils Obtaining 5 GCSEs A*-C (2004-06)
Higham Hill (Centre)	35.67
Hatch Lane (North)	59.31
Larkswood (North)	57.59
Leyton (South)	39.07
Waltham Forest	53.10
London	57.90
England	58.50

- 1.56 Poor educational attainment is not limited to geographical areas only. Although there have been improvements in attainment since 2003 amongst BAME pupils, Black African and Caribbean pupils remain under-achieving. The table below presents the 2006 GCSE results for pupils living in Waltham Forest:

Fig 36: GCSE Results by Ethnicity in Waltham Forest

Waltham Forest <sup>8</sup>	LBWF	London	UK
<b>% Pupils achieving 5 A* to C by ethnic grouping</b>	<b>2006</b>	<b>2006</b>	<b>2006</b>
White	53.0	57.6	57.2
Mixed	52.3	56.9	55.7
Asian	55.2	66.3	60.9
Black	41.8	48.2	47.9
Chinese	71.4	80.8	79.8

### Class Sizes- Waltham Forest

- 1.57 Class sizes are slightly above average in Waltham Forest compared to London and England. The increased rate of migration from for example Eastern Europe, could add further unexpected increases to class sizes.

Fig 37: Average Class Sizes in Waltham Forest

Average Class Size <sup>9</sup>	Primary	Secondary
LBWF	27.5	22.6
London	26.9	21.3
England	26.2	21.3

<sup>7</sup> Dept for Children, Families and Schools Statistics (2007)

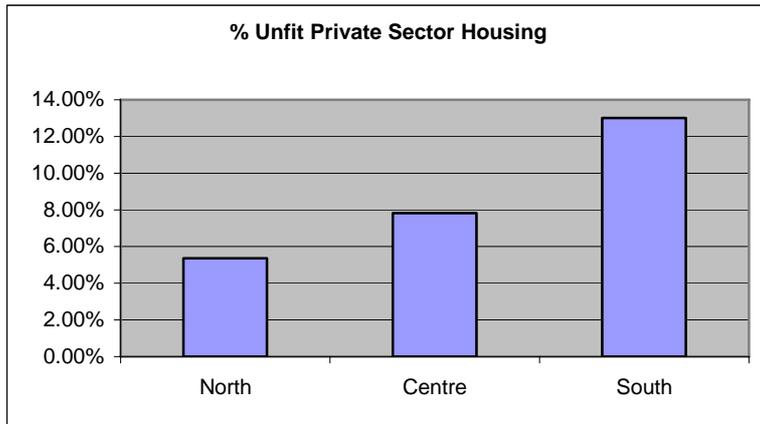
<sup>8</sup> Dept for Children, Schools and Families 'Statistics' (2007)

<sup>9</sup> Dept for Children, Schools and Families 'Statistics' (2007)

### Unfit Housing in Waltham Forest

1.58 Housing is also another key indication of the apparent deprivation in the centre and south of the borough. Whereas there are relatively low levels of housing deprivation in the north, due to high quality housing stock, parts of the centre, such as Wood St and Hoe St wards, and most of the south suffer from a higher proportion of unfit private sector housing. Unfit housing is not only bad for energy efficiency and household finance, but fuel poverty means serious risks for people’s health, especially older people. The graph below gives a snapshot of where unfit housing is located in the borough.

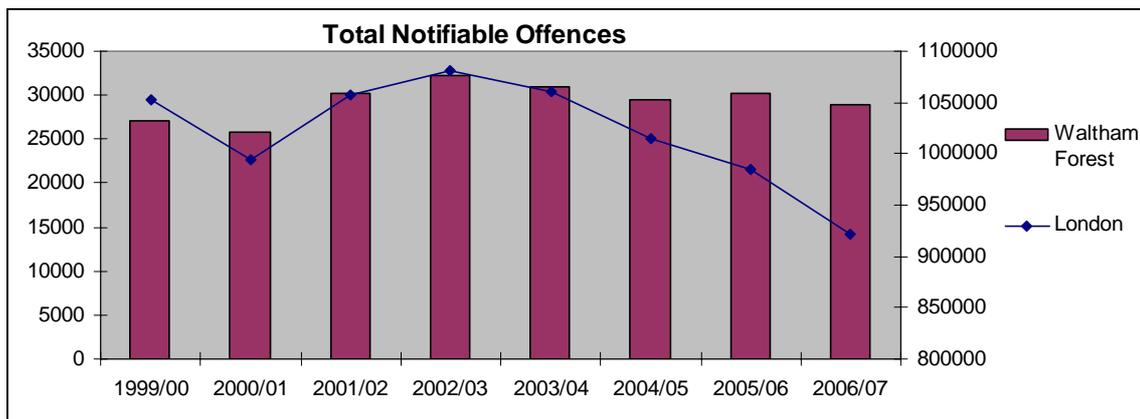
Fig 38: Unfit Private Sector Housing in Waltham Forest



### Community Safety Issues in Waltham Forest

1.59 Crime rates have reduced from the peak of 2002/03 but have not fallen at the same rate as they have in London:

Fig 39: Total Notifiable Offences in Waltham Forest and London



1.60 The table presented below demonstrates that the borough has cut back the rate of offences in some categories at a faster rate than the rest of the country. However in many instances the reduction is at a lower rate, or even worse it is rising:

Fig 40: % Changes in Notifiable Offences

Type of Crime	% Change in the No. of Notifiable Offences 2001-2006		
	LBWF	London	England
Violence Against the Person	+37%	+22%	+61%
Robbery	+11%	-15%	-21%
Burglary	-23%	-13%	-30%
Theft of a Motor Vehicle	-21%	-30%	-35%
Theft from a Motor Vehicle	-3%	-16%	-23%
Sexual Offences	-6%	+4%	+50%

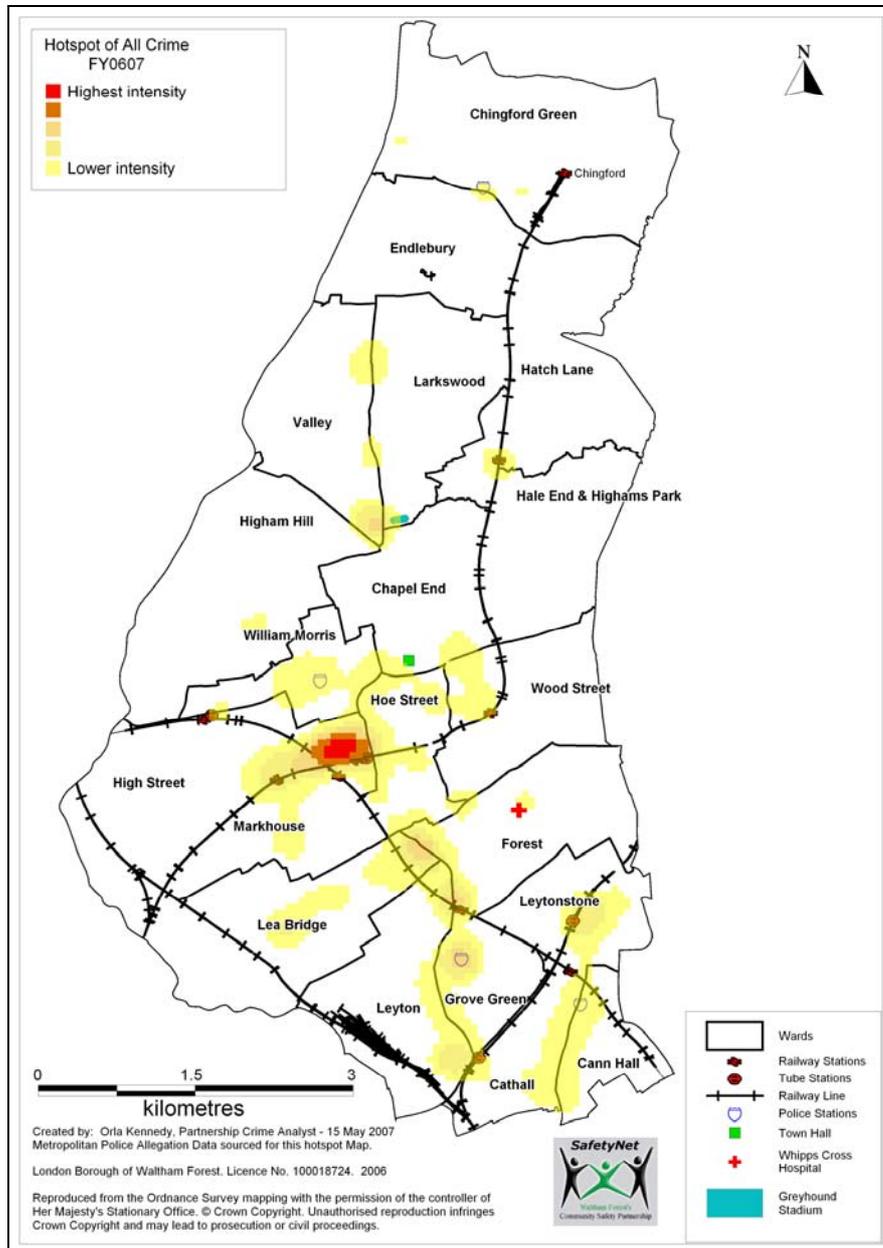
- 1.61 Areas in the south and centre of the borough have much higher rates of 'notifiable offences per 1000 population' than areas in the north as confirmed by the table below:

Fig 41: Crime Levels across Waltham Forest

Area	Total Notifiable Offences per 1,000 population
North	100
Centre	146
South	128
<b>Waltham Forest</b>	<b>127</b>

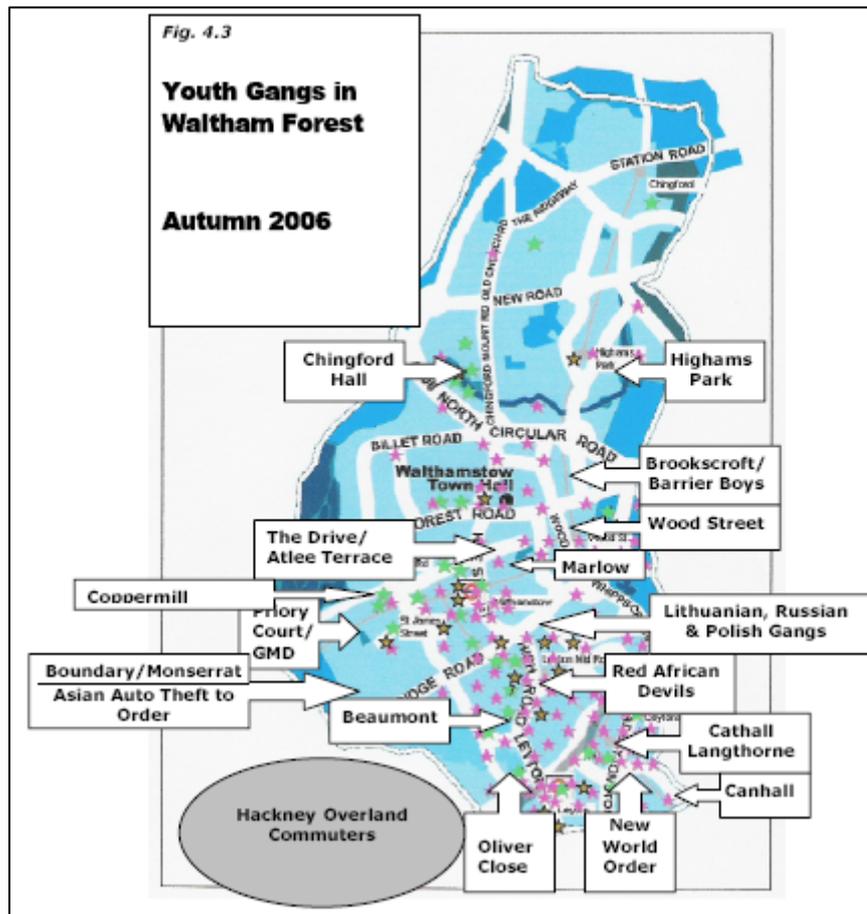
- 1.62 The particular map developed by SafetyNet (the borough's Crime Prevention and Disorder Partnership [CRDP]), demonstrates that crime is spatially concentrated in hotspots in the south and centre of the borough, and focused on its main thoroughfares.

Fig 42: The Distribution of Crime in Waltham Forest



1.63 In 2006 Waltham Forest commissioned Professor John Pitts to conduct a piece of research into youth gangs in Waltham Forest. Of roughly 16 gangs only 2 came from areas north of the 'North Circular'. The map below demonstrates these characteristics

Fig 43: Youth Gangs in Waltham Forest



1.64 Youth gangs are concentrated around areas with highest rates of criminal activity which suggests a correlation between criminal activity and the proliferation of youth gang activity.

### Violence Against a Person

1.65 The increase in the number of violence against a person offences in Waltham Forest was more severe than London: 37% compared to 22%. The maps below, representing the distribution of common assault and actual bodily harm offences in Waltham Forest, demonstrates that violent offences are concentrated in areas in the south and centre:

Fig 44: Hotspots of Common Assault in Waltham Forest

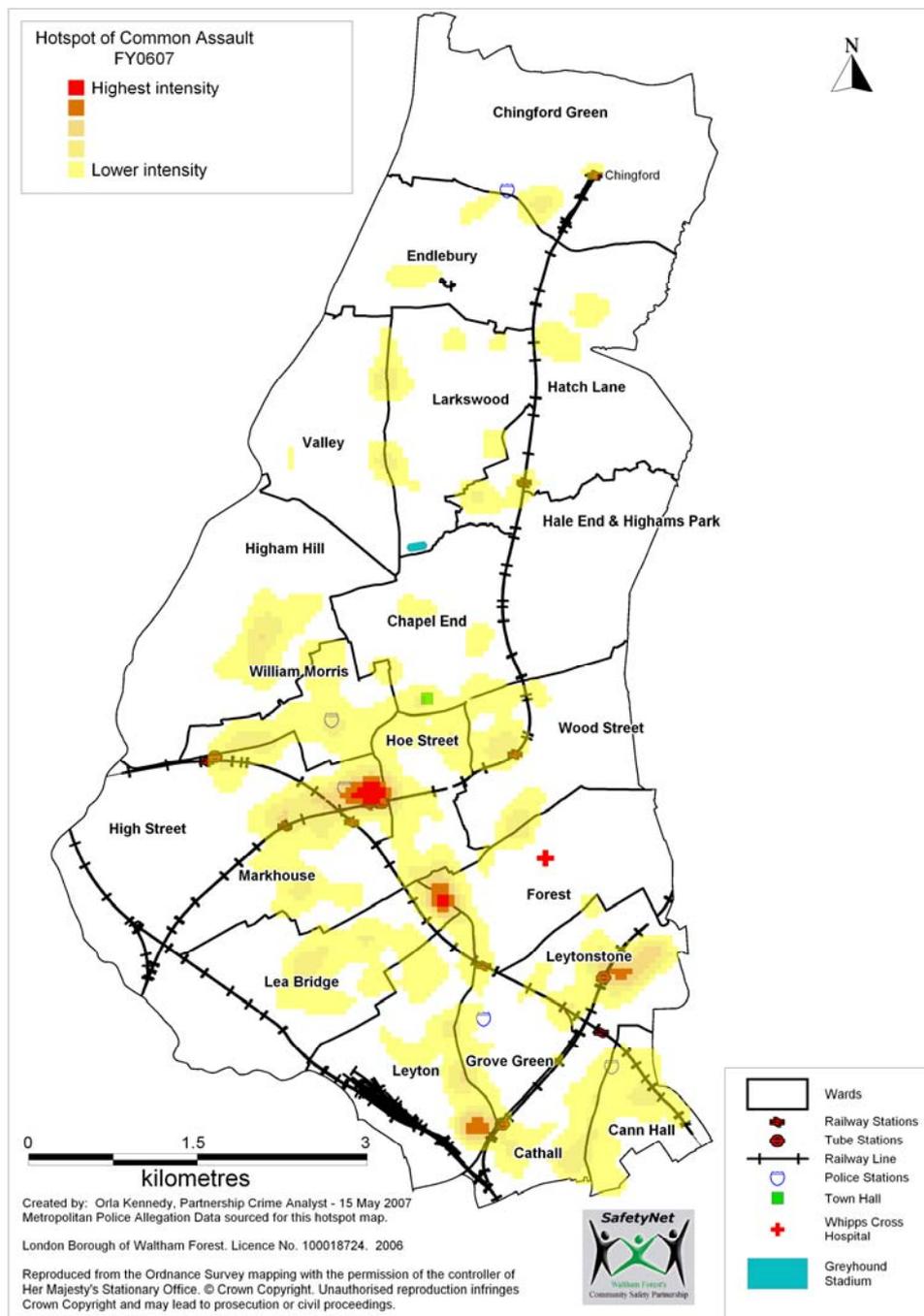
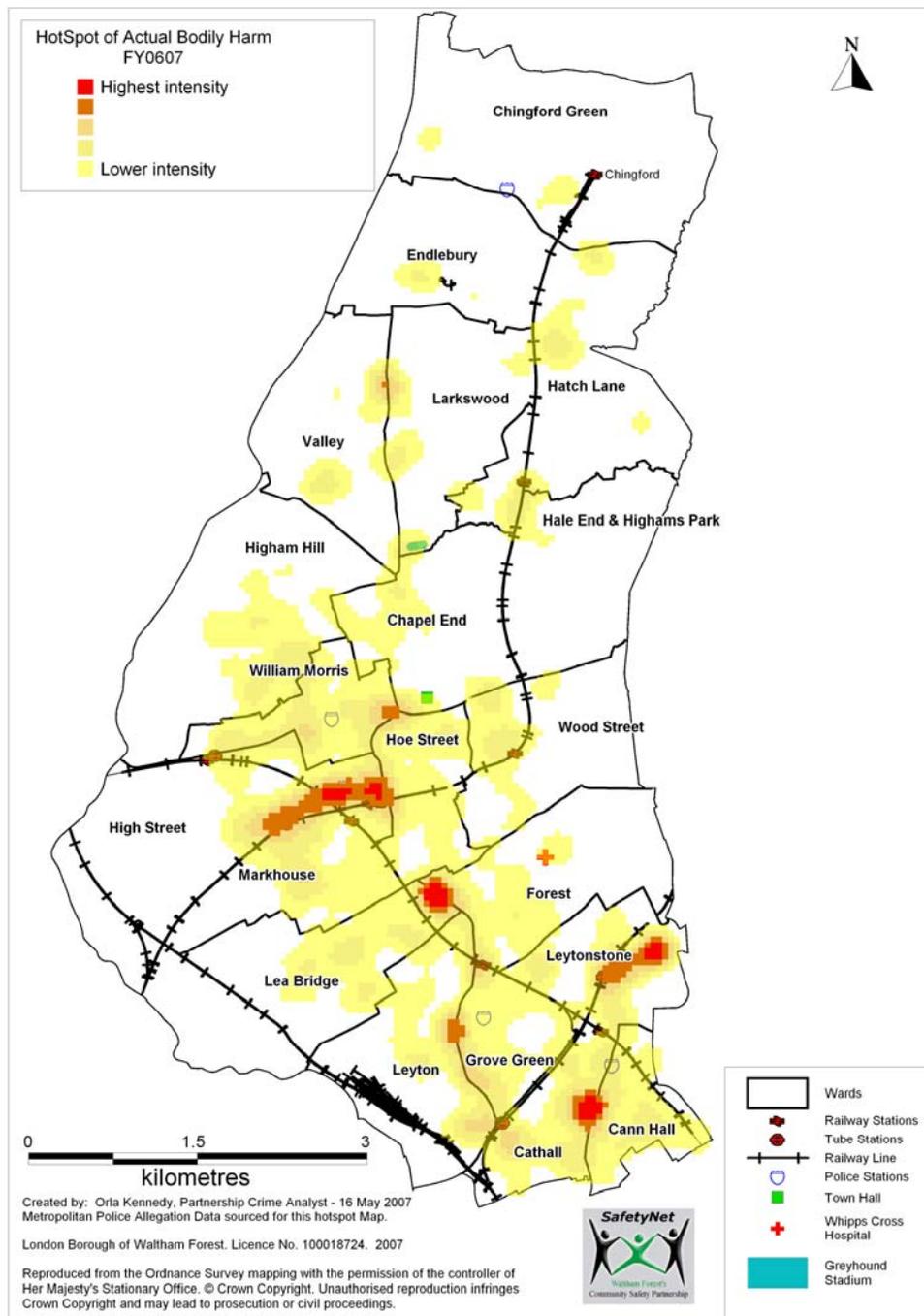


Fig 45: Hotspots of Actual Bodily Harm in Waltham Forest



1.66 Besides the geographical concentration of crime it is notable that BAME people are twice as likely to suffer more crime than white people.

## Chapter 2: Housing in our borough

2.1 This section provides evidence of ‘where we are now’ in terms of the borough’s key housing issues. The section describes the range of contemporary housing issues in Waltham Forest. This section is split into:

- **Tenure mix in Waltham Forest**
- **Demand and supply for housing**
- **Affordable housing in London and Waltham Forest**
- **The rise of ‘Buy to Let’ properties in Waltham Forest**

### Tenure and Ownership Mix in Waltham Forest

#### Summary

2.2

- **The borough’s tenure and ownership patterns are largely in line with those for London as a whole but with significantly more social housing than the average for outer London.**

#### In Detail

##### Tenure Mix

2.3 According to the 2001 Census, the borough’s tenure mix was in line with the patterns across London. 58% of households were owner-occupiers compared to 56% in London. 22% of households were socially rented, which is only 4% below the London average level. The proportion of social housing is significantly higher than for outer London. The table beneath demonstrates the borough tenure characteristics.

Fig 46: Tenure Mix in Waltham Forest

Type	Proportion
Owner Occupier	59.0%
Private Rent	17.5%
Social Rent	22.5%
Shared Ownership	1.0%

2.4 In recent years an intermediate housing market has developed in the borough. Waltham Forest’s shared ownership levels are slightly below London levels. There are particularly higher concentrations in the centre (1.16%). There are lower than average levels of shared ownership properties in the south.

Fig 47: Shared Ownership Housing in Waltham Forest

Area <sup>10</sup>	% Shared Ownership Stock
North	0.77%
Centre	1.16%
South	0.58%
Waltham Forest	0.88%
London	0.96%

- 2.5 These figures need updating. The forthcoming 'Housing Market Assessment' should be a robust source of evidence to determine present levels of shared ownership levels.

## Demand for Housing in Waltham Forest

### Summary

2.6

- **Waltham Forest like the rest of London has an excess level of demand for its existing housing stock**
- **Overcrowding occurs to stronger degrees in the deprived and ethnically diverse areas of the south and centre**
- **Significant numbers of people remain in need of social housing and are living in temporary accommodation**

### In Detail

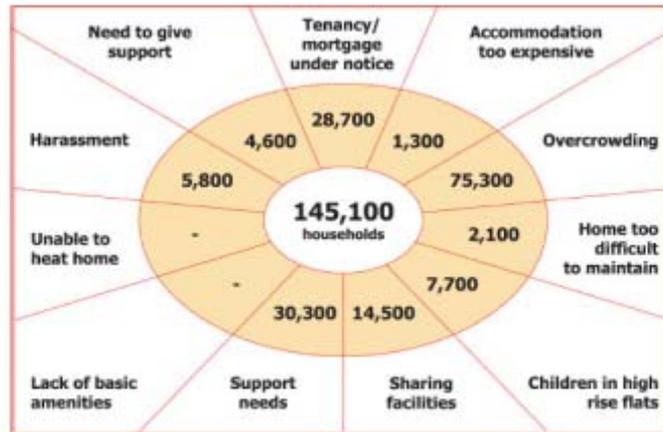
#### Demand for Housing

- 2.7 London does not have enough housing to meet current and future needs. According to the 'GLA Housing Evidence Base', in gross terms there is a 560,000 gap in supply as against demand for new housing. Once appropriate renovations and improvements have taken place in existing housing stock, there is a net 145,100 households in need of new housing<sup>11</sup>. A more specific breakdown of housing need, taken from the GLA Housing Evidence Base, is presented below.

<sup>10</sup> Census (2001)

<sup>11</sup> GLA 'Housing Evidence Base' (2005)

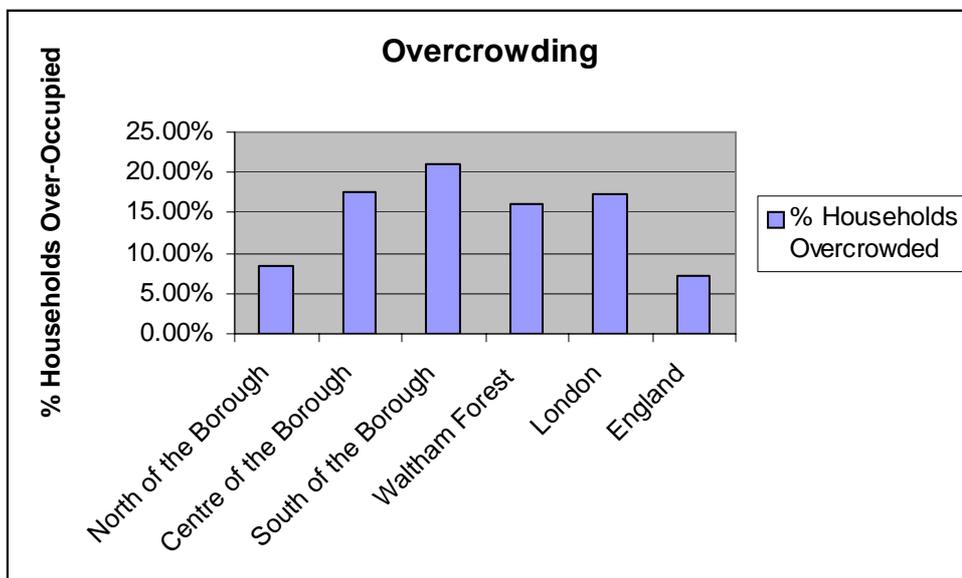
Fig 48: Housing Needs in London



Source: GLA

2.8 Overcrowding is a major cause of the current housing crisis in London: in 2004 **753,300 households were living in over-occupied housing**. Waltham Forest in line with London suffered from similar rates of over-occupancy. According to the 2001 Census, 16% of households were over-occupied in Waltham Forest. Overcrowding occurs significantly in the centre and south of the borough, highlighted in the graph below.

Fig 49: Overcrowding in Waltham Forest



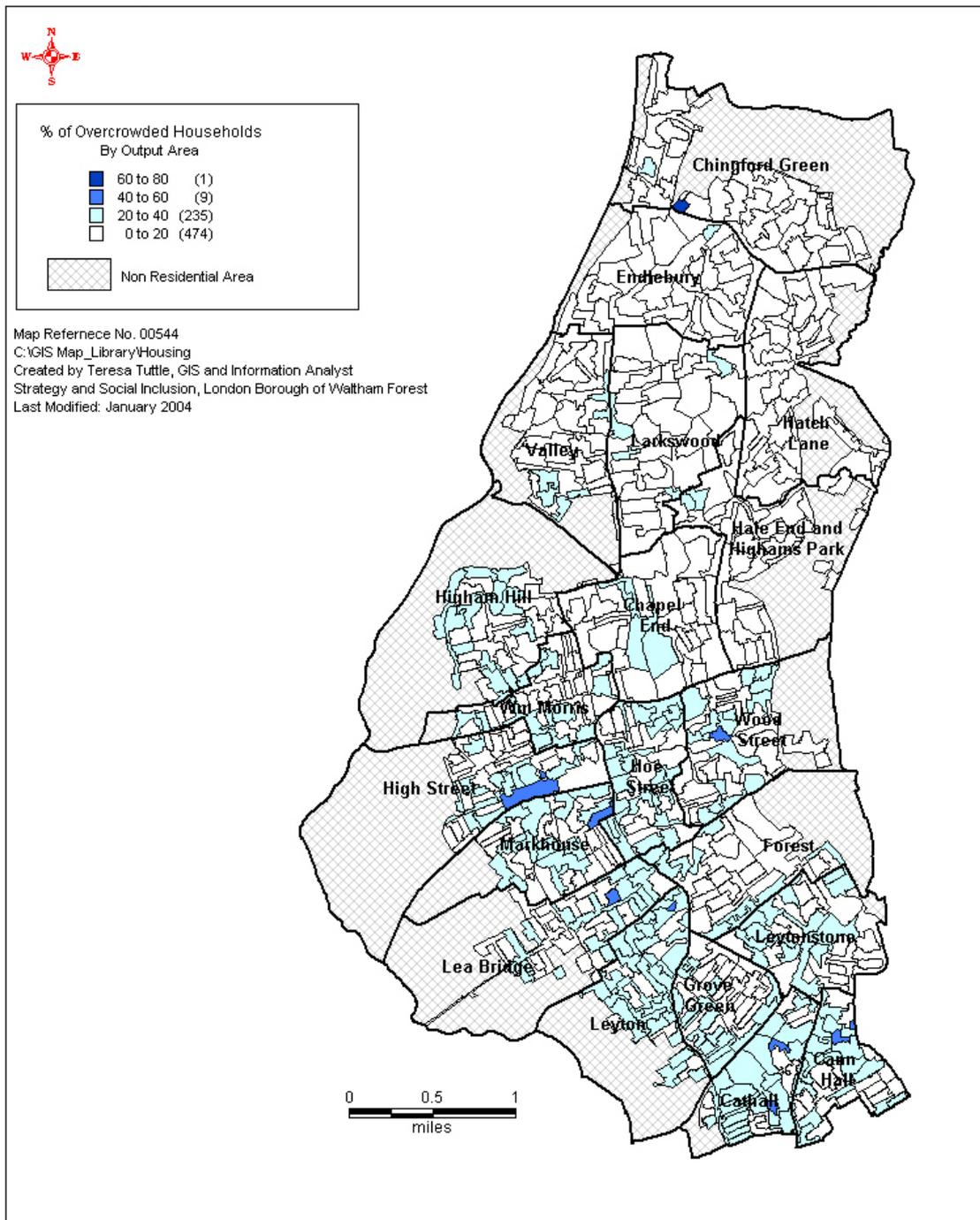
12

2.9 The map overleaf highlights (in shades of blue) areas with at least 20% of households living in over-occupied accommodation

<sup>12</sup> ONS Census 2001

Fig 50 : Overcrowded Households across Waltham Forest

**Overcrowded Households in Waltham Forest by Output Area**



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- 2.10 There are 11,052 persons on the Local Authority Housing Register (the Council's "waiting list") and 1,752 people were living in temporary accommodation in 2004/05.
- 2.11 The last Housing Market Assessment', in 2005, found that the borough had a shortfall of 3 and 4-bed properties and other larger family units. The Housing Market Assessment due to take place in the coming months will update housing needs in the borough

## Affordable Housing in London and Waltham Forest

### Summary

2.12

- **Although house prices are rising rapidly in the borough, Waltham Forest is still comparatively cheap and not yet an 'unaffordable location' in London terms**
- **On present income levels many Waltham Forest residents could not however afford to become home in they borough**

### In Detail

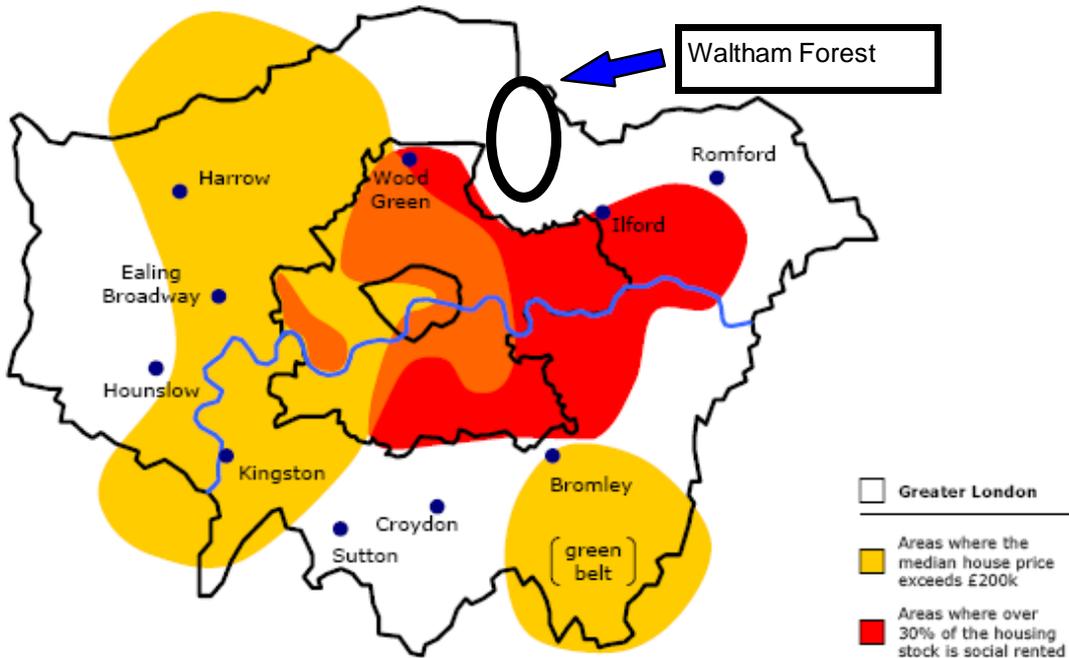
#### Affordability in London

- 2.13 It is estimated on current income levels that 73 % of the working age people do not earn enough to become a first time home-owner in large sections of London. The London Report<sup>13</sup> highlighted that there are particular unaffordable concentrations developing around inner and west London. The figure below demonstrates that Waltham Forest is not yet thought of as part of the major unaffordable concentration of housing in London:

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<sup>13</sup> Prime Minister's Strategy Unit The London Report (2004)

Fig 51: House Prices in London



2.14 Evidence, taken from GP registrations, suggests that people have moved into the borough from more expensive areas in order to access home ownership. House prices in inner north London areas have risen to unaffordable levels for middle income-earners, as the table below demonstrates.

Fig 52: House Price Growth in North London

Areas <sup>14</sup>	Average House Prices in 2007	Average Flat Prices - 2007
Stoke Newington	£373,769	£216,590
Kentish Town	£414,894	£326,497
Islington	£392,032	£332,449
Highbury	£319,493	£285,358
Crouch End	£333,088	£258,656

### House Price Growth in Waltham Forest

2.15 The rise in house prices in London Boroughs, such as Islington, Haringey and Hackney has pushed residents from these boroughs into Waltham Forest evidenced by GP registration statistics. Consequently, demand for properties in Waltham Forest has increased, which has pushed up house prices making it unaffordable for a number of middle-income earners in the borough to buy a house. The table below highlights the large increases in house prices across all areas in the borough.

<sup>14</sup> Evidence for all house prices from 'house price' reports at [www.home.co.uk](http://www.home.co.uk)

Fig 53: House Price Growth in Waltham Forest

	Average House Prices- 2000	Average House Prices- 2007
Leyton	£131,192	£246,921
Wanstead <sup>15</sup>	£176,018	£344,667
Walthamstow	£111,469	£233,960
Chingford	£153,188	£284,675

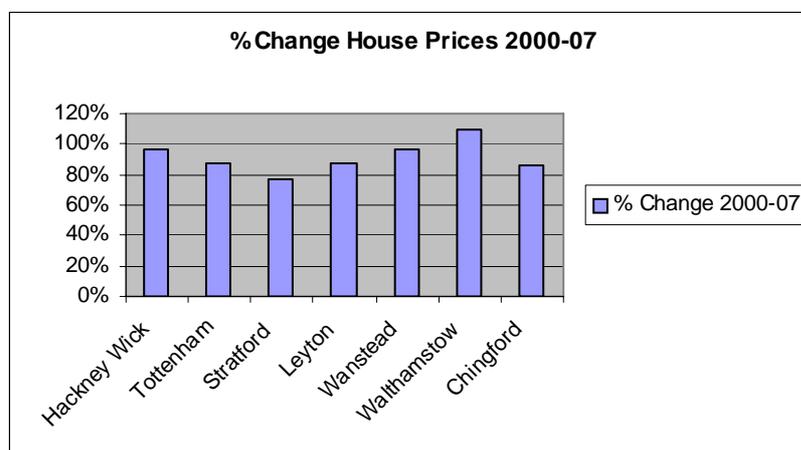
2.16 The increase in house prices across areas in Waltham Forest has been very high. As the table below highlights, some properties have doubled in price since 2000. Walthamstow has enjoyed the most dramatic rise in house prices over the course of the last seven years. Moreover, recent trends (2000-07), shown in the table below indicates that this pattern is continuing in all areas in the borough.

Fig 54: % House Price Growth in Waltham Forest

	% Increase in House Prices 2000-07
Leyton	88%
Wanstead	96%
Walthamstow	110%
Chingford	86%

2.17 Price rises in neighbouring areas, such as Tottenham and Hackney Wick are roughly equal to increases in the centre and south of the borough, as the graph below demonstrates.

Fig 55: House Price Growth in Waltham Forest and Neighbouring Areas



### Affordability in Waltham Forest

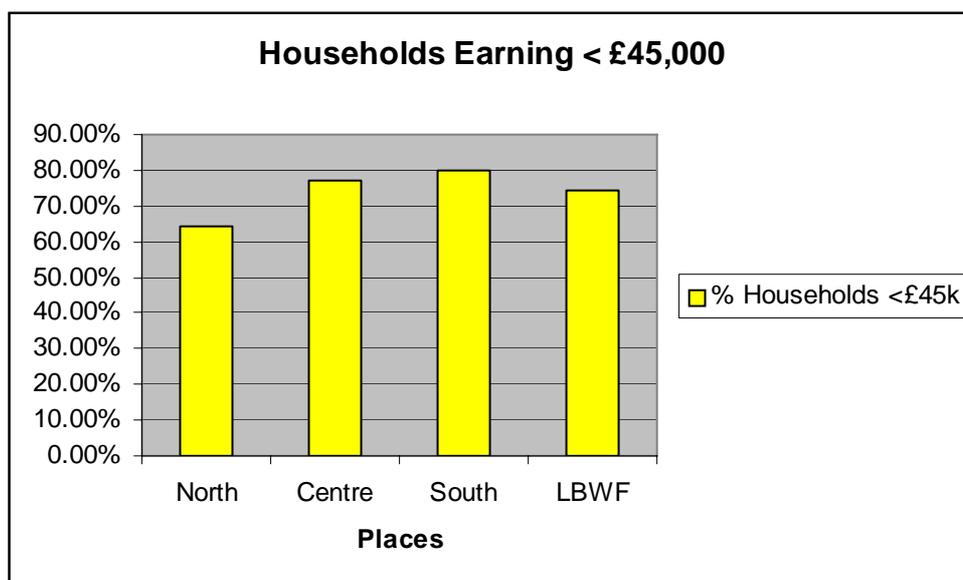
2.18 The issue for the borough is in ensuring a degree of access to home ownership for key workers and local residents. Information from the borough's latest 'Housing Strategy Statement' indicates that average private rents per month for a 2 bed flat are around £800, which is too expensive for many in the borough. Similarly, the

<sup>15</sup> Wanstead has been used as significant numbers of Leytonstone properties are marketed as Wanstead by estate agents

minimum house price for a 1 bed flat in the borough is £122,000, which would require an annual single income of £33,000 or a joint income of £45,000.

2.19 Based on an assumption of current average income levels<sup>16</sup>, local house prices would 'price out' significant numbers of residents in the borough: only 25% of households would be able to purchase a house or flat at the lowest price in the borough<sup>17</sup>. Not only do house prices prevent mainstream home ownership from those who are income deprived<sup>18</sup>, but it also prevents access to home ownership for many middle income earners, such as key workers in the borough who are earning jointly (if a couple) less than £45,000 or £33,000 on their own.

Fig 56: Income Levels in Waltham Forest



## The Rise of Buy-to-let Properties

### Summary

2.20

- **The private rental sector and 'buy-to-let properties' are increasing in quantity in Waltham Forest**
- **There are an increasing number of properties in the south and to a lesser extent in the centre of the borough converted from family sized houses into multiple flats for sale or rent which has had the following effects:**
  - **A shortage of and demand for family accommodation**
  - **Providing affordable homes for first time buyers with good incomes.**
  - **Pushing up the price of family houses**
  - **Increasing the number of houses in multiple occupation**

<sup>16</sup> Current Income Levels were aggregated and derived from research by Waltham Forest research officers

<sup>17</sup> Based on an understanding that they were first time buyers.

<sup>18</sup> Income deprived: less than 60% national median income- £14,227

## In Detail

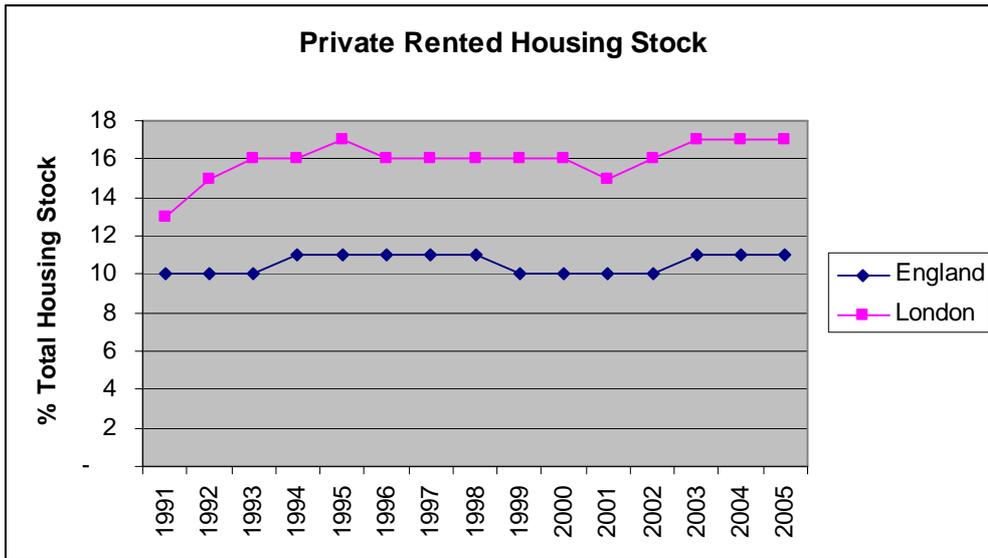
### Buy to Let Properties

- 2.21 The presence of 'buy-to-let' properties in an area presents a number of issues and opportunities for the area in question:
1. On a positive note buy to let properties offer the possibility of bringing young professionals with larger than average disposable income levels. The impact of this group can, under the right local economic context, benefit the local economy (but it does require activities, services and goods on which they can spend their money e.g. an evening economy including restaurants, cultural facilities and other entertainments).
  2. Adversely, the conversion of houses into flats potentially reduces the available supply of family housing. This can push up prices for scarce family accommodation encouraging residents to move elsewhere in London. Moreover, the lack of space and higher house prices in the borough can lead to overcrowding for poorer households.
  3. Buy to let properties potentially contribute to encouraging more transient residents who are less likely to become active citizens in a neighbourhood. Census data, mentioned in the previous chapter, reveals that the middle super output areas in the centre and south have the highest population turnover.

### Private Rented Housing Sector in Waltham Forest

- 2.22 The private rental sector has been increasing its share of the housing market since 1991. There are now 155,000 more private sector rental units in London than there were in 1991. The graph below demonstrates that London's private rental market has grown faster than the rest of England.

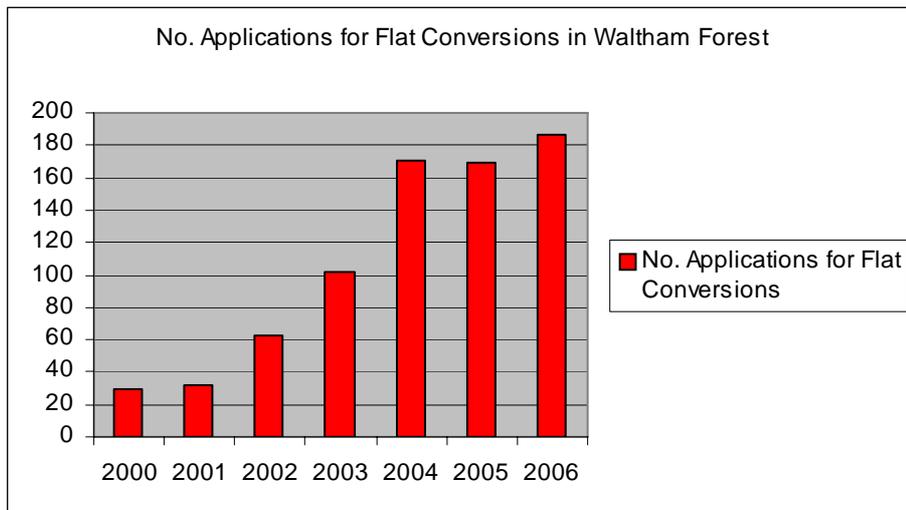
Fig 57: Private Rented Housing Stock Change 1991-2005



### Buy to Let Properties in Waltham Forest

2.23 The evidence on buy to let mortgages and the private rental sector in the borough is not as detailed as the London picture. The ‘Housing Market Assessment’ should provide a more detailed and robust evidence base about the private rental sector in Waltham Forest and on the buy to let trend in the borough. But, from available evidence of planning permissions for flat conversions, it appears a similar trend is occurring in Waltham Forest to London: **there are increasing numbers of properties that have moved from family sized housing into multiple flats for rent or sale**, in the main through the conversion of Victorian terraced properties. The graph below tracks the increasing trend for flat conversions taking place in the borough since 2000.

Fig 58: Applications for Flat Conversion in Waltham Forest 2000-06

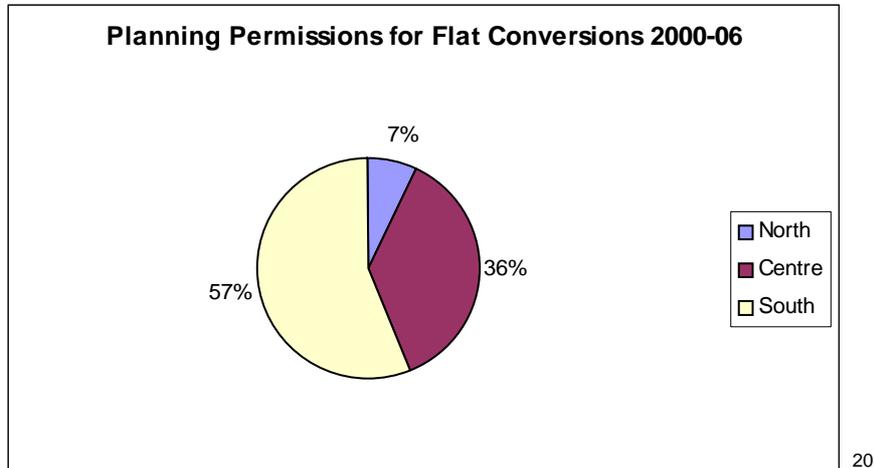


19

<sup>19</sup> London Development Database

2.24 The rise in 'buy to let properties' has occurred increasingly in the south of the borough with an increasing pressure for the conversion of the housing stock into flats (see figure 46 below).

Fig 59: Planning Permissions for Flat Conversions in Waltham Forest



2.25 It is likely that these conversions have also had the effect of increasing the number of 'Houses in Multiple Occupation' (HMOs). The Council estimate, based on recent surveys, that there are around 2,000 units in 'multiple occupation' status. These are predominantly located along the main thoroughfares of the south and centre of the borough in Leyton, Leytonstone and Walthamstow.

<sup>20</sup> London Development Database

## Chapter 3: Employment and skills in our borough

3.1 This chapter draws the picture of Waltham Forest in terms of:

- **Socio-Economic Groupings**
- **Skills Levels**
- **Worklessness**

### Socio-Economic Grouping and Structure in Waltham Forest

#### Summary

3.2

- **The borough has proportionally less people in ‘higher socio-economic’ occupations than London**
- **In recent years the borough has been losing people from higher socio-economic groups and in particular it has been losing ‘professionals’ at a fast rate**
- **There is a reasonably equal geographical distribution of people employed in higher socio-economic groups across the borough**

#### In Detail

3.3 Information taken from the ONS ‘Annual Population Survey’ establishes that Waltham Forest has a lower proportion of its total workforce, in the higher socio-economic groups (managerial, professional and associate) and more in the intermediate (technical) and lower (low skills) group.

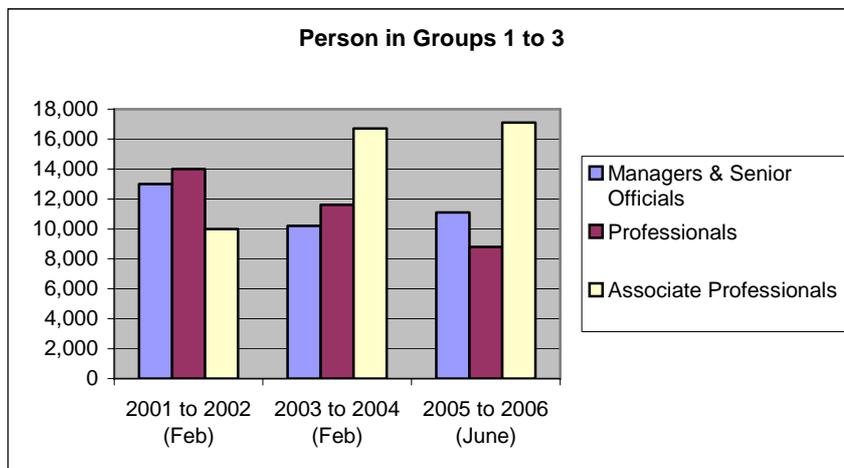
Fig 60: Major Socio-Economic Groups 1-9

<b>Major Socio-Economic Groups 1-9 (2006)</b>			
	<b>Groups 1-3 (Higher)</b>	<b>Groups 4-7 (Intermediate)</b>	<b>Groups 8-9 (Lower)</b>
<b>Area</b>			
<b>LBWF</b>	42.80%	40.50%	16.70%
<b>London</b>	50.00%	35.00%	14.00%

3.4 Looking at the broader picture since 2001, the borough has suffered a ‘real’ decline in the number of people employed in groups 1-3. In March 2001 there were 38,000 people in the borough employed in groups 1-3; and by June 2006 there were only 37,000 even though the actual working age population of the borough had risen by 2,200 persons.

3.5 It is apparent that the major decline has occurred in professional occupations (group 2) rather than among managers. The graph below outlines these changes:

Fig 61: Persons in Major Socio-Economic Groups 1-3



3.6 The rise in 'Associate Professionals' (group 3) is probably the result of increases in public sector occupations in the borough, such as nurses, teaching assistants and other 'para-professional' occupations within the public sector.

3.7 There is no significant variation in occupational grades between different areas in the borough, which may be a surprise to those who assumed that there would be a higher level of managerial, professional and other skilled people in the north of the borough.

Fig 62: The Socio-Economic Structure of the Borough by Geography

	Groups 1-3	Groups 4-7	Groups 8-9
<b>Area</b>			
<b>North</b>	40.16%	43.36%	16.47%
<b>Centre</b>	41.68%	40.73%	17.60%
<b>South</b>	44.15%	38.64%	17.21%
<b>LBWF</b>	42.80%	40.50%	16.70%
<b>London</b>	50.00%	35.00%	14.00%
<b>GB</b>	40.00%	39.60%	20.50%

## Skills Levels in Waltham Forest

### Summary

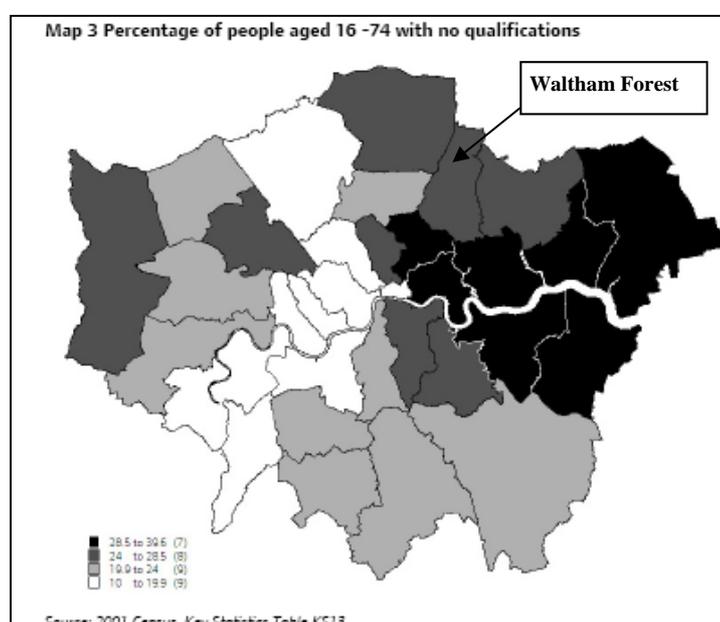
3.8

- **Waltham Forest has a serious skills deficit. 24% of the working age population in London has no skills or qualifications. In Waltham Forest the figure is 28.5%.**
- **Almost half the population are below NVQ Level 2.**
- **The skills deficit is likely to have contributed to unemployment and worklessness in the borough**

## In Detail

- 3.9 The UK and London still have skills deficits in comparison to other countries in the developed world. Seven million adults in the UK lack functional literacy and five million lack functional numeracy.
- 3.10 The problem of skills is particularly acute in London. Whilst the city offers a number of highly paid jobs to its residents, it also requires skills its residents often do not have. 24% of working age residents in London have no qualifications. Sub-regionally, qualification levels are lower in east and north east London than elsewhere in the capital.

Fig 63: Regional Map of skills shortages in London



- 3.11 Whilst the skills deficit is not as severe in Waltham Forest as it is in some parts of London, it is still a challenging issue for the borough. Figure 50 demonstrates that the borough is in the second highest group of boroughs with a high proportion of people with no qualifications. The census suggested that there were 28.5% working age people without qualifications.
- 3.12 More specifically, the proportion of people who lack NVQ level 2 or equivalent represents almost half of the working age population<sup>21</sup>. At 46% this is significantly above the London average: it is similar to Haringey and Enfield, but far worse than Barnet which has just 30% of its population below the level 2 threshold. The skills deficit has contributed to higher than average unemployment in the borough.

<sup>21</sup> Office of National Statistics

## Worklessness in Waltham Forest

### Summary

3.13

- **Worklessness issues in London are very different to the rest of England due to the multiple social disadvantages suffered by most workless people in London**
- **Economic inactivity and worklessness is located in areas of the south and centre of the borough where there is the greatest diversity and deprivation**
- **Approximately 31% of households in the borough are on at least one form of benefit**
- **The south and centre contain a far higher level of benefit claimants than the north**

### In Detail

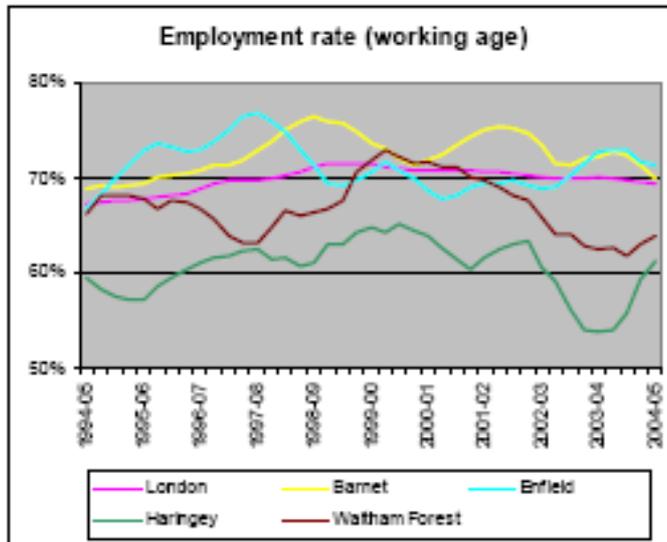
#### Worklessness in London and Waltham Forest

- 3.14 Recent research indicates that London's worklessness problem is very different to the rest of the UK<sup>22</sup>. The workless population in London makes up 31% of the total working age population. Unlike the rest of England, they are drawn from a young, ethnically diverse and gender balanced population. This means that the workless population, unlike in the rest of England, will be likely to suffer from multiple forms of social disadvantage.
- 3.15 The **workless population** in Waltham Forest is 36% compared to a London average of 31%. However, this varies across the borough. Although the rate of employment broadly followed the London average through most of the 1990s, it has declined quite sharply since 2000.
- 3.16 Evidence from the other North London Boroughs shows that, whilst the employment rates for Barnet and Enfield compare well against the London average, Waltham Forest is seriously below the London benchmark, as the graph below illustrates:

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<sup>22</sup> LDA 'What Works With Tackling Worklessness' (2006)

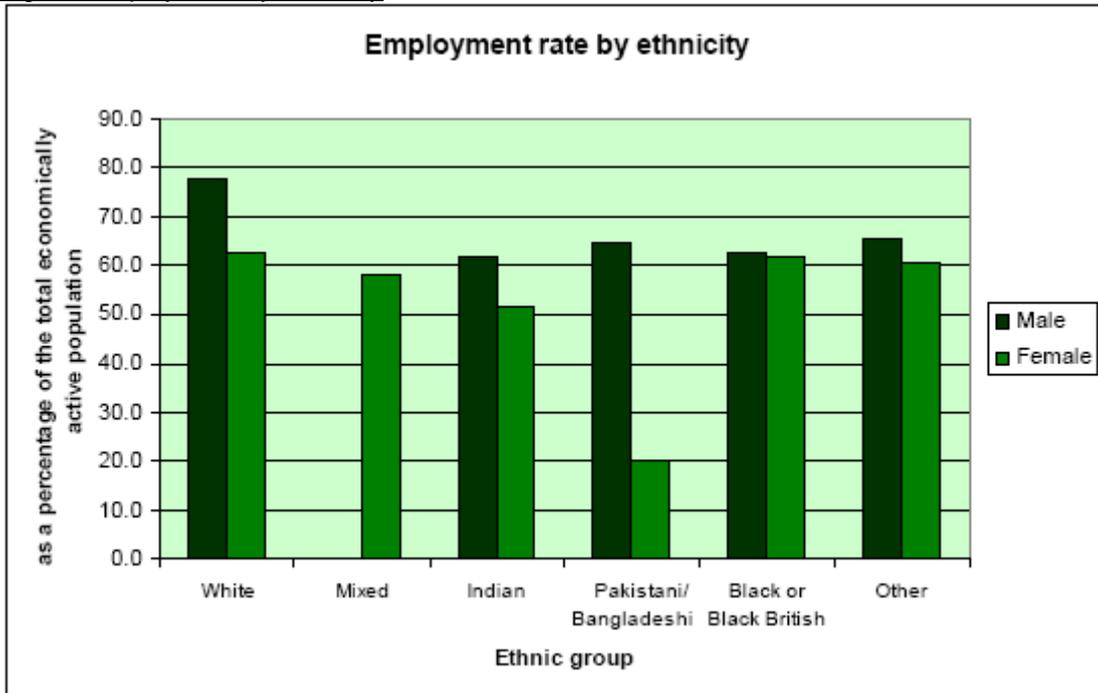
Fig 64: Employment Rate in Waltham Forest and Other London Boroughs



### Unemployment by Ethnicity, Gender and Age

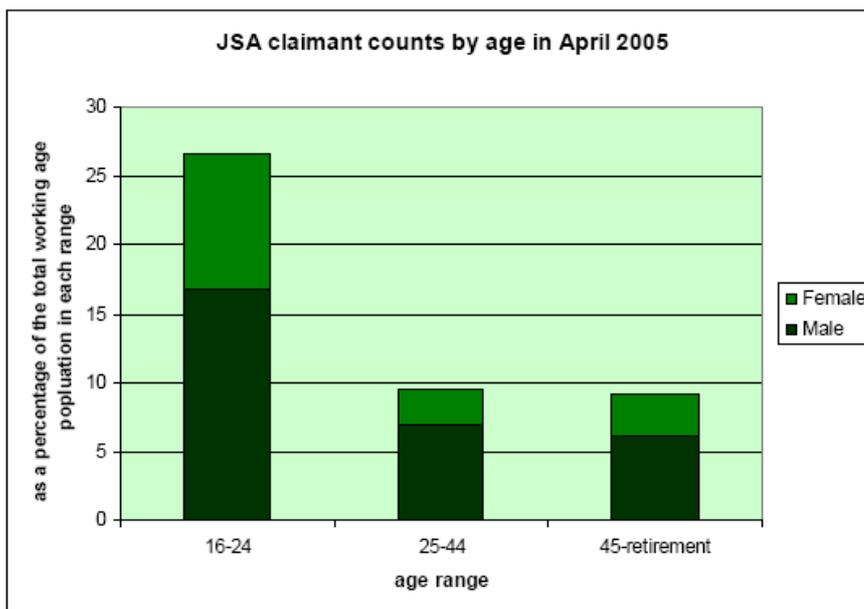
- 3.17 Available information indicates that there are some variations between different social groupings within the borough.
- 3.18 Information, drawn from the Labour Force Survey shows, in the graph below, the distribution of employment by ethnicity and gender. In 2003-04 the difference between levels of employment in the white and BAME communities was around 12% for the male population, but is much more evenly spread across the female population (with the exception of Pakistani/Bangladeshi women, where the low employment rate is assumed to be for cultural reasons).

Fig 65: Employment by Ethnicity



3.19 Unemployment is higher for the younger population, especially males, before decreasing at similar rates for both sexes. It is not unusual that more young people are claiming jobseeker's allowance as there are more young people moving between education and work and new deal programmes and work, during which periods they temporarily make use of jobseeker's allowance whilst looking for work.

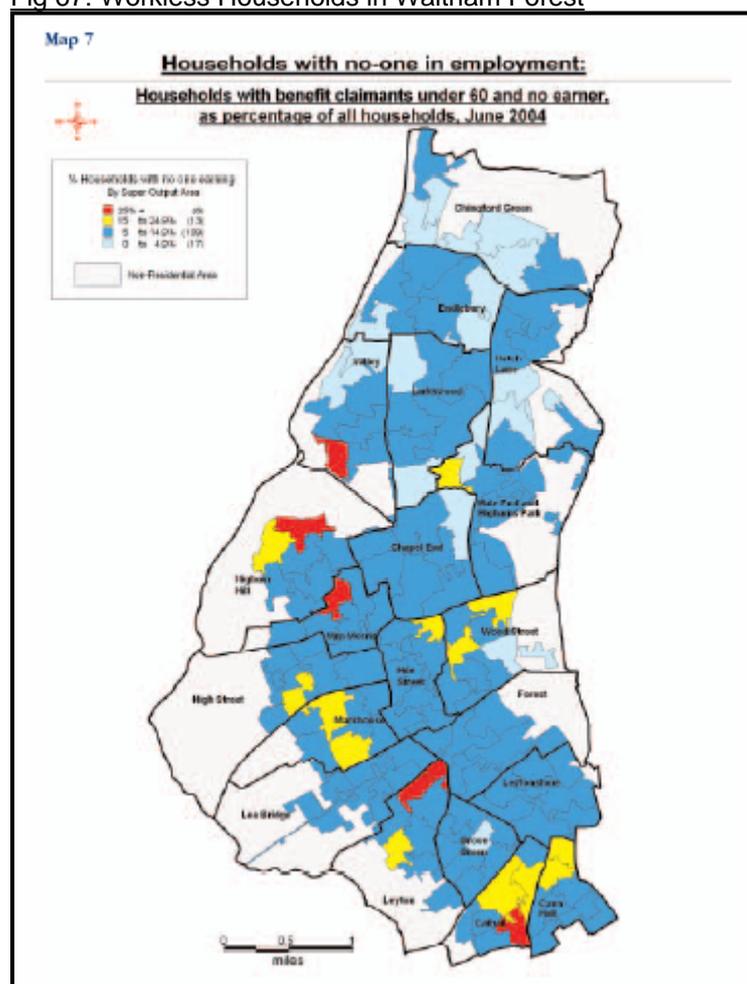
Fig 66: Unemployment by Age



## The Geography of Worklessness

- 3.20 Areas of worklessness and economic inactivity are more concentrated in the south and centre than in the north of the borough. The highlighted areas, in red (1<sup>st</sup> quartile) and yellow (2<sup>nd</sup> quartile) are super output areas with a high proportion of workless households:

Fig 67: Workless Households in Waltham Forest



## Benefit Claimants in Waltham Forest

- 3.21 According to information from the Dept of Work & Pensions, in 2006 there were 26,120 benefits claimants in the borough. Out of this total, “incapacity benefit” claimants were the largest group followed by job seekers and lone parents:

Fig 68: Benefit Claimants in Waltham Forest

	Total	JSA	Incapacity	Lone parents	Carers	Disabled	Others benefits	Bereaved
LBWF	26,120	6,515	9,885	5,820	1,345	1,190	1,045	320

3.22 Geographically, more claimants were concentrated in the centre than anywhere else. There were over double the number of claimants in the centre as opposed to the north as the table below highlights:

Fig 69: Benefit Claimants across Waltham Forest

<b>Total Benefits Claimants (2006)</b>		
	<b>No of Claimants</b>	<b>% of the Population</b>
North	5,700	9.4%
Centre	11,880	13.1%
South	8,540	12.8%
<b>LBWF</b>	<b>26,120</b>	<b>12%</b>

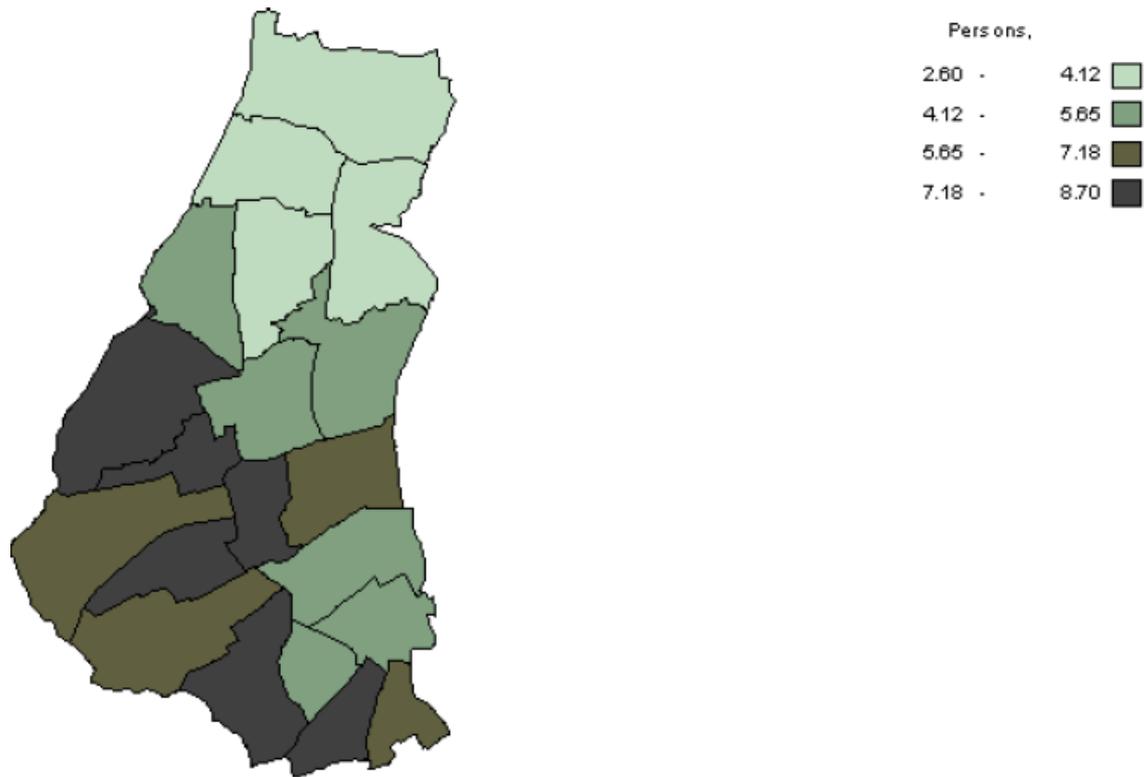
3.23 On a closer inspection wards in the north contain areas with the least claimants, whereas wards in the south and centre contain the highest concentrations. **Leyton ward has nearly triple the number of claimants that Chingford Green has.**

Fig 70: Benefit Claimants by Ward

<b>2006</b>	<b>Total Claimants</b>
Cann Hall	1,575
Cathall	1,645
Chapel End	1,085
<b>Chingford Green</b>	<b>630</b>
Endlebury	810
Forest	1,180
Grove Green	1,165
Hale End and Highams Park	1,005
Hatch Lane	1,120
High Street	1,380
Higham Hill	1,665
Hoe Street	1,560
Larkswood	1,025
Lea Bridge	1,660
<b>Leyton</b>	<b>1,730</b>
Leytonstone	1,245
Markhouse	1,575
Valley	1,110
William Morris	1,370
Wood Street	1,585
<b>LBWF</b>	<b>26,120</b>

3.24 More specifically, residents on Job Seekers Allowance are predominantly located in deprived wards in the south and centre of the borough as the map below illustrates.

Fig 71: Job Seeker Allowance Claimants across Waltham Forest



3.25 The Council's latest information indicates that approximately 31% of households in Waltham Forest are on at least one form of benefit.

## Chapter 4: Economic Growth and Inward Investment in our borough

4.1 This chapter focuses on:

- **The economic structure**
- **Waltham Forest's Share of London's economic growth**
- **Inward investment**

### The Economic Structure of Waltham Forest

#### Summary

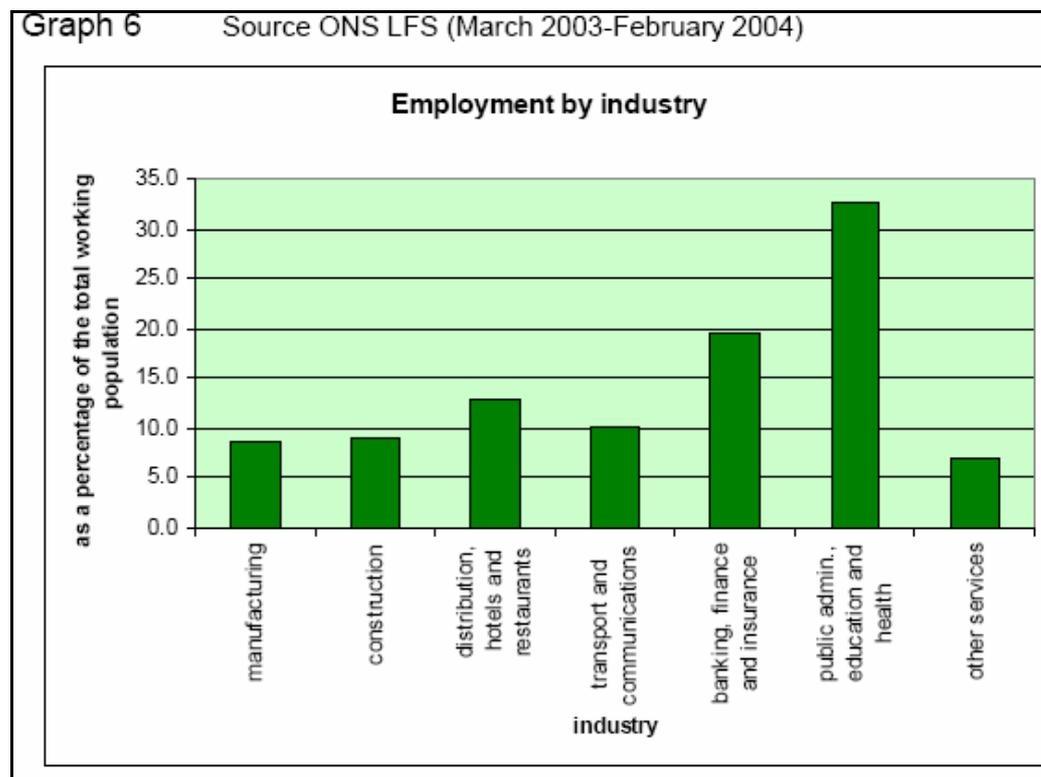
4.2

- **Employment is dominated by the public sector (33%). Most enterprises are located in the centre of the borough**
- **Waltham Forest is a small business economy (67%) are micro businesses with less than 5 employees)**
- **A quarter of businesses are sole traders**
- **There are a significant number of BAME businesses (37%)**
- **Entrepreneurship is comparatively low – the VAT registration rate is one of the lowest in London.**

#### In Detail

4.3 According to the Labour Force Survey, the public sector employs 33% of people in the borough: Waltham Forest's proportion of public sector employment is one of the highest in London. Banking, finance and insurance at 20% employ the second highest number of people. The graph below demonstrates employment features in Waltham Forest:

Fig 72: Employment by Industry



4.4 Looking at Census information from 2001, the majority of business is located in the centre of the borough:

Fig 73: Enterprises in Waltham Forest

Area	Number of Businesses
North	2252
Centre	4086
South	2567
LBWF	8905

### The Business Community in Waltham Forest

4.5 Information taken from the MORI Business Survey in LBWF's Enterprise strategy (2006) provides an in depth profile of the borough's business community.

### Characteristics of the Business Community

4.6

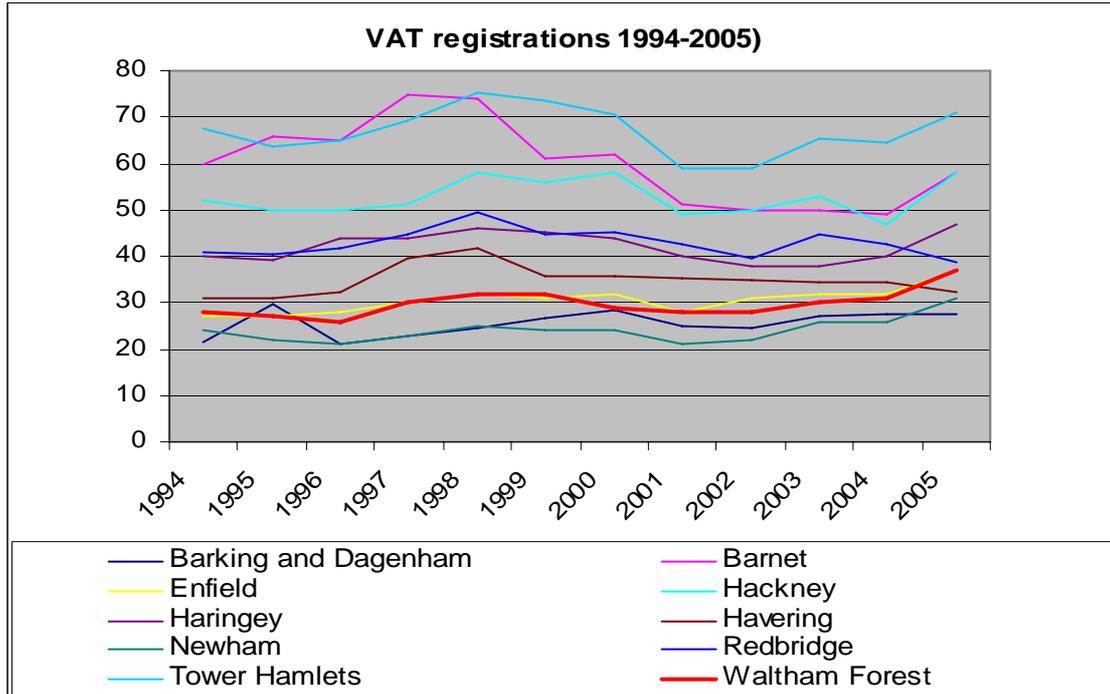
- Ethnically diverse workforce dominated by micro businesses
- 67% of all businesses are micro businesses (1-4 employees)
- Largely male owned businesses (74%)
- Significant proportion of BAME owned businesses – 37% non-white
- Limited high technology or knowledge intensive industries in the Borough
- Self employment rates, although once low, are now rising steadily. One quarter of all businesses are now sole traders

## Business formation and length of trading

4.7

- Just under three quarters (74%) of the businesses surveyed have been trading for over 2 years
- 56% of businesses are considered well established (trading for over 5 years)
- Business formation in the Borough is low. The VAT registration rate is lower than neighbouring boroughs and is one of the lowest in London.

Fig 74: VAT Registration in Waltham Forest and Other London Boroughs



## Diversity in owners/employers

4.8

- The largest representation is from the Asian or Asian British category
- There are significantly higher levels of male employees relative to female employees
- A significant proportion of staff are from a BAME background, indicating a diverse active workforce. Only 38% of businesses reported that they had no staff from a BME background
- There are very low levels of disabled employees, which is not unusual.

## Waltham Forest's Share in London's Economic Growth

### Summary

4.9

- London experienced 4% growth in private sector knowledge intensive industries between 1998 and 2004 but Waltham Forest lost 2%
- Whilst employment levels rose by 5% in London between 1998 and 2004, they fell by 1% in Waltham Forest
- 50% of London's jobs are in the private sector knowledge intensive industries but only 31% of Waltham Forest's are.
- Waltham Forest has only 3% employment in the financial services sector whereas London has 13%
- Waltham forest lost 2,900 manufacturing jobs (38% decline) over the last 10 years.

### In Detail

4.10 London and the south east of England is the economic powerhouse of the UK. London contains more economic activity within its boundaries than any other region in the UK. London's GVA (Gross Value Added) is substantially higher than any other region at 18% of the UK's total GVA. Moreover, its economic activity spreads outside its administrative borders forming a mega city-region with the south east and east of England regions.

Fig 75: The London City Region

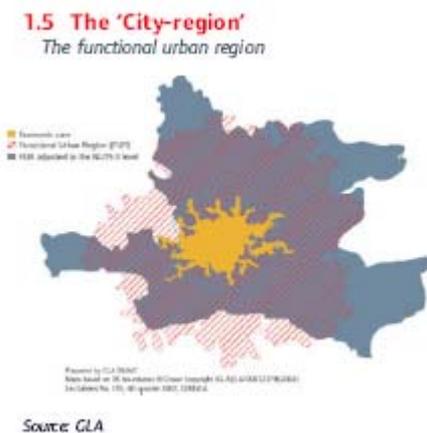
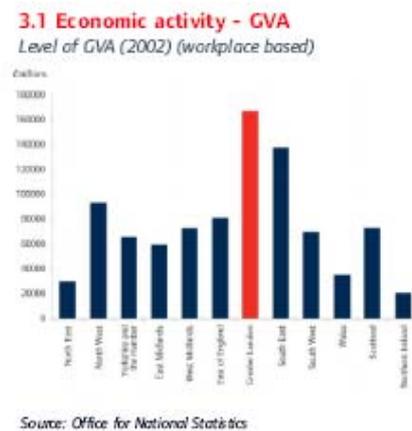
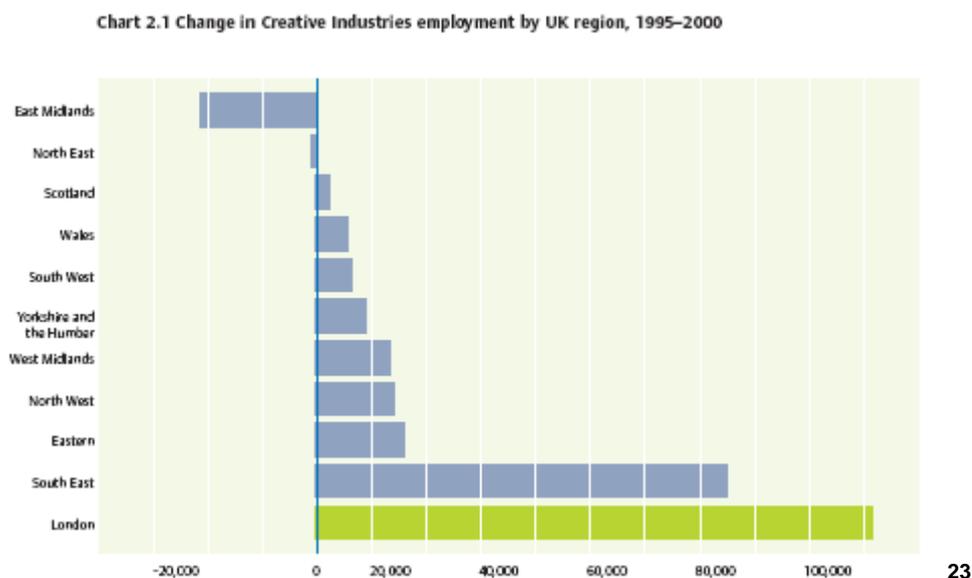


Fig 76: Economic Activity in the UK



4.11 London's economic activity is largely powered by knowledge intensive industries. 60% of employment in London is in knowledge intensive and high technology sectors. Emerging growth sectors, such as information communication technology, the creative industries and the environmental industries, have broadened London's economic base. For example, the graph below demonstrates that London, in comparison to other regions, experienced a tremendous growth in the creative industries in late 1990s.

Fig 77: Growth in the Creative Industries



4.12 Whilst London - as a region - has experienced growth in these sectors, Waltham Forest has not witnessed the same level of growth. Without public sector employment, Waltham Forest experienced a **-2% growth in knowledge intensive industries**, whilst at the same time, London overall experienced a 4% growth in this sector. The table below demonstrates the position in more detail:

Fig 78: Employment Growth in the Knowledge Intensive and High Technology Sectors

Knowledge intensive and high technology employment						
	London (2004)			Waltham Forest (2004)		
	All	share of total employment in London	1998-2004 change	All	share of total employment in Waltham Forest	1998-2004 change
Extractive and manufacturing	50,500	1%	-37%	700	1%	-56%
Transport & telecommunications	134,600	3%	-7%	900	2%	+29%
Financial & business services	1,249,900	32%	+5%	9,000	16%	0%
Education	295,600	7%	+24%	7,500	13%	+19%
Health and social work	370,300	9%	+20%	7,900	14%	-9%
Other services	216,300	5%	+21%	2,300	4%	+28%
<b>All knowledge intensive</b>	<b>2,317,200</b>	<b>59%</b>	<b>+9%</b>	<b>28,300</b>	<b>50%</b>	<b>+1%</b>
Total employment	3,953,800			56,400		
Knowledge intensive (private sector only)	1,651,300	50%	+4%	12,900	31%	-2%

SIC definitions based on 'Employment in the Knowledge Based Economy', in European Commission, 'Employment in Europe', 2000, pp. 55-65

4.13 The key employment growth sectors are not represented to the same degree in Waltham Forest as they are in London. The information presented below, taken from the LBWF Enterprise Strategy, demonstrates that Waltham Forest is trailing other London boroughs in sharing the economic fruits of recent prosperity in the regional

<sup>23</sup> Creative London 'Report on the Creative Industries in London' (2004)

<sup>24</sup> LBWF Enterprise Strategy (2006)

economy. Importantly, as the table below highlights, the borough's share of employment is significantly lower than London's share:

Fig 79: Waltham Forest's Share of Employment in Key Growth Sectors

Share of employment accounted for by London's key growth sectors		
	London	Waltham Forest
Creative industries	12%	6%
ICT	4%	2%
Tourism and Leisure	10%	8%
Financial services	13%	3%

25

4.14 Whilst regional statistics, taken from the Annual Business Inquiry, reveal a general rise in the number of employees in recent years of 5%, the borough has not enjoyed a similar rise. Employment remained fairly static with a 1% drop in overall employment. Manufacturing, formerly one of the borough's biggest employment sectors, has continued to decline across London with a loss of 25% of manufacturing jobs between 1998 and 2004. Manufacturing declined severely in the borough, in the last decade - a 38% fall, representing a loss of 2,900 jobs. The table below highlights these trends in Waltham Forest's economic structure.

Fig 80: Employment Growth and Decline in London and Waltham Forest

	Employment by broad sector category 1998-2004					
	Waltham Forest			London		
	1998	2004	change	share	change	share
D : Manufacturing	7,600	4,700	-38%	8%	-25%	5%
F : Construction	3,100	2,600	-17%	5%	-11%	3%
G : Wholesale and retail trade; repairs	11,700	12,600	+8%	22%	+1%	15%
H : Hotels and restaurants	2,700	2,700	-2%	5%	+18%	7%
I : Transport, storage and communication	2,300	2,700	20%	5%	+1%	8%
J : Financial intermediation	1,000	700	-32%	1%	-2%	8%
K : Real estate, renting and business activities	8,000	8,300	+3%	15%	+8%	24%
L : Public administration	2,900	2,900	-1%	5%	+5%	6%
M : Education	6,300	7,500	+20%	13%	+24%	7%
N : Health and social work	8,700	7,900	-9%	14%	+20%	9%
O : Other services	2,700	3,800	+42%	7%	+15%	7%
<b>Total</b>	<b>57,200</b>	<b>56,400</b>	<b>-1%</b>	<b>100%</b>	<b>+5%</b>	<b>100%</b>

Source: ABI Employee Analysis

26

4.15 There is no evidence to explain why business does or does not (which is more relevant here) locate in Waltham Forest. The factors, which in general terms most determine decisions about business location are being close to clients; accessibility; availability of suitable accommodation; cost; and availability of suitable labour.

<sup>25</sup> LBWF Enterprise Strategy (2006)

<sup>26</sup> LBWF Enterprise Strategy (2006). Other services includes the following sectors: sewage, sanitation, refuse disposal, activities of membership organisations, motion picture and video activities, radio and television, news agency activities, library, archives, museums and other cultural activities, sporting activities and other services.

## Inward Investment

### Summary

4.16

- **There is no evidence of sustained high levels of inward investment and development activity in Waltham Forest**

### In Detail

- 4.17 Private investment and property development are seen as integral to the development establishing of a flourishing vibrant local economic base. Regeneration is not sustainable without private investment (public sector grant investment is temporary and improvements are often unsustainable). Cash flows from the private sector can play a key role in facilitating the improvement of local infrastructure, bringing in increased spending power via its workforce and enhancing the local identity by establishing industries and sectors in a local economy.
- 4.18 London is a classic example of the power of private investment. As a global centre of international finance, London experiences not only high levels of property development and investment from international finance, but is also home to a range of major investment portfolios in the City of London. Property finance in London regularly exceeds levels of international investment found in other major international cities.
- 4.19 Waltham Forest has not shared in inward investment. Despite being between a number of growth areas in London, the borough suffers from a low profile. The Council does have a significant asset portfolio that could help to draw in private sector investment.
- 4.20 A major issue for Waltham Forest is the apparent lack of developable land. At present there is only around 19ha of brownfield land available<sup>27</sup>. By way of comparison, 2,000 ha of land in the borough is green open space; and in Southwark one site - the Elephant and Castle redevelopment - is a 69ha site.

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<sup>27</sup> National Land Use Database

## Chapter 5: Transport in our borough

5.1 This chapter highlights the current state of transport infrastructure and travel patterns in Waltham Forest and is divided into:

- **Waltham Forest's transport infrastructure**
- **Travel Patterns amongst Waltham Forest Residents**
- **Commuting in and out of Waltham Forest**
- **Working from home in Waltham Forest**

### Waltham Forest's Transport Infrastructure

#### Summary

5.2

- **Waltham Forest has efficient connections predominantly in the south and centre into Central London from the centre and south of the borough.**
- **The north and centre of the borough suffer from poor access to Stratford and neighbouring towns in north London**
- **Travelling north to south in the borough by public transport is problematic and has led to increased congestion on the road network**

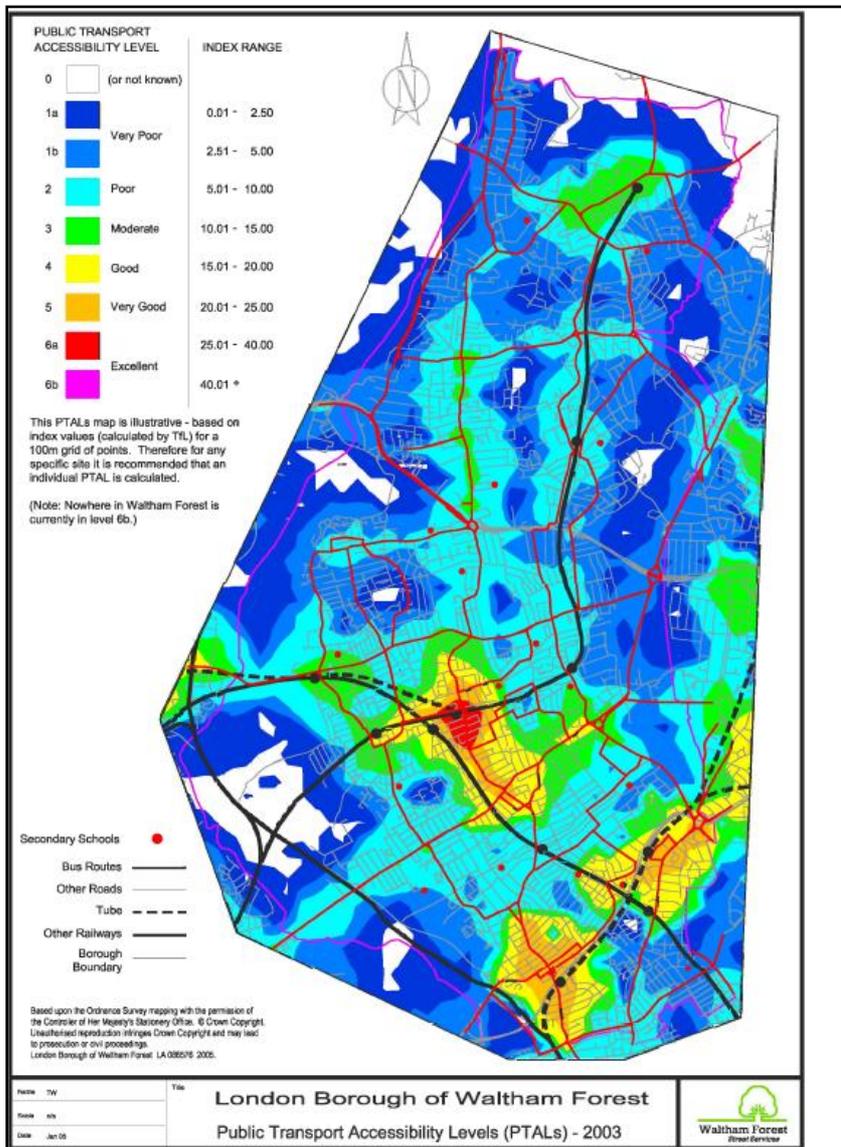
#### In Detail

5.3 The borough's transport network is one of its key assets. The major transport infrastructure running throughout the borough strengthens its place as an accessible location within London. In comparison to other outer London boroughs, Waltham Forest contains highly efficient strategic links transporting commuters into central London. Residents living in Walthamstow, Leyton and Leytonstone can get into central London within 30 minutes. The Public Transport Accessibility Level map, shown overleaf, illustrates the relative accessibility of different areas in Waltham Forest.

5.4 A particular weakness in the borough's transport infrastructure is the lack of rapid public transport accessibility into key sub-regional towns. Access into Stratford, the docklands and other key locations along the Lower Lea Valley is poor from the centre and north of the borough. Future employment opportunities in Stratford could be lost if adequate transport routes are not developed within the short to medium term. Access into north London towns, such as Tottenham Hale and Wood Green from the south and north of the borough is also problematic.

5.5 There is likewise inadequate public transport connections for those wishing to travel across the borough north to south. It is assumed that this inadequacy adds to congestion on major roads within Waltham Forest.

Fig 81: Public Transport Accessibility in Waltham Forest



## Travel Patterns in Waltham Forest

### Summary

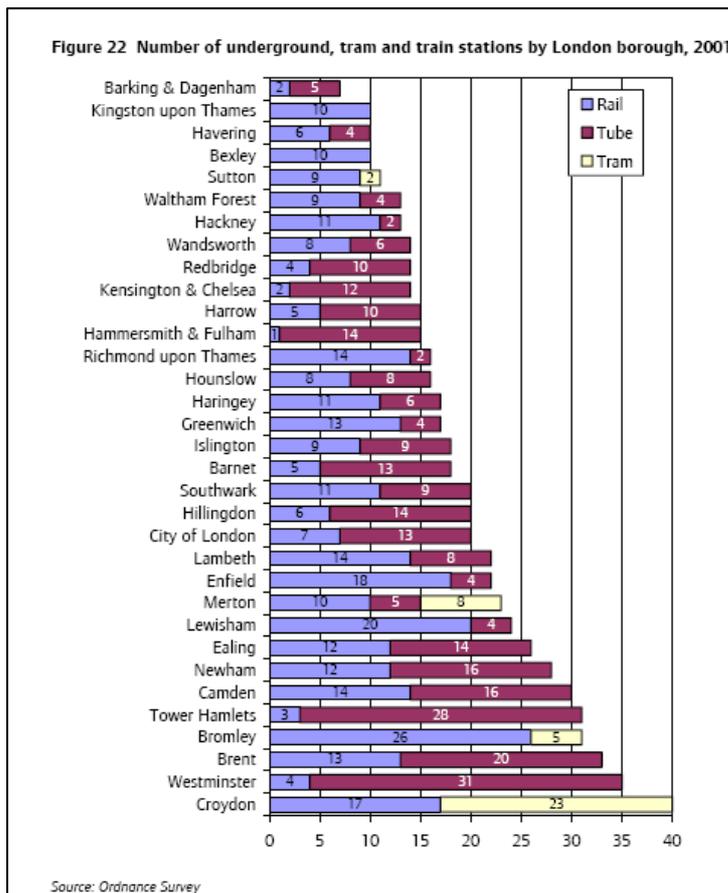
5.6

- With the exception of cycling, the borough has very similar travel patterns to the rest of London
- The borough's underground stations are heavily used by commuters, but its mainline rail stations operate at relative under-capacity

## In Detail

- 5.7 London has very different travel to work patterns to the rest of the England. Unlike other cities in England there is an extensive public transport infrastructure in place across most of London. Consequently, London has lower rates of car travel, particularly in inner London, than the rest of England. Waltham Forest's travel to work patterns are in line with London patterns. Cycling is the only exception, which is lower than in most other London boroughs<sup>28</sup>.
- 5.8 The number of rail and tube stations in the borough is actually lower than most other London boroughs. **On average, 6,578 people use each underground station daily to commute out of Waltham Forest, which is a much higher level than any outer London borough;** only Hackney and the City of London have a higher ratio at 7,060 and 7,746 respectively. Contrastingly, only 983 people, on average, use each of the borough's 9 mainline train stations, which is below the outer London average of 1,277 and the London average of 1,166. The graph below demonstrates the relative shortage of transport facilities in Waltham Forest in comparison to other London boroughs

Fig 82: Stations in London Boroughs



<sup>28</sup> GLA 'Commuting in London' (2007)

## Commuting in and out Waltham Forest

### Summary

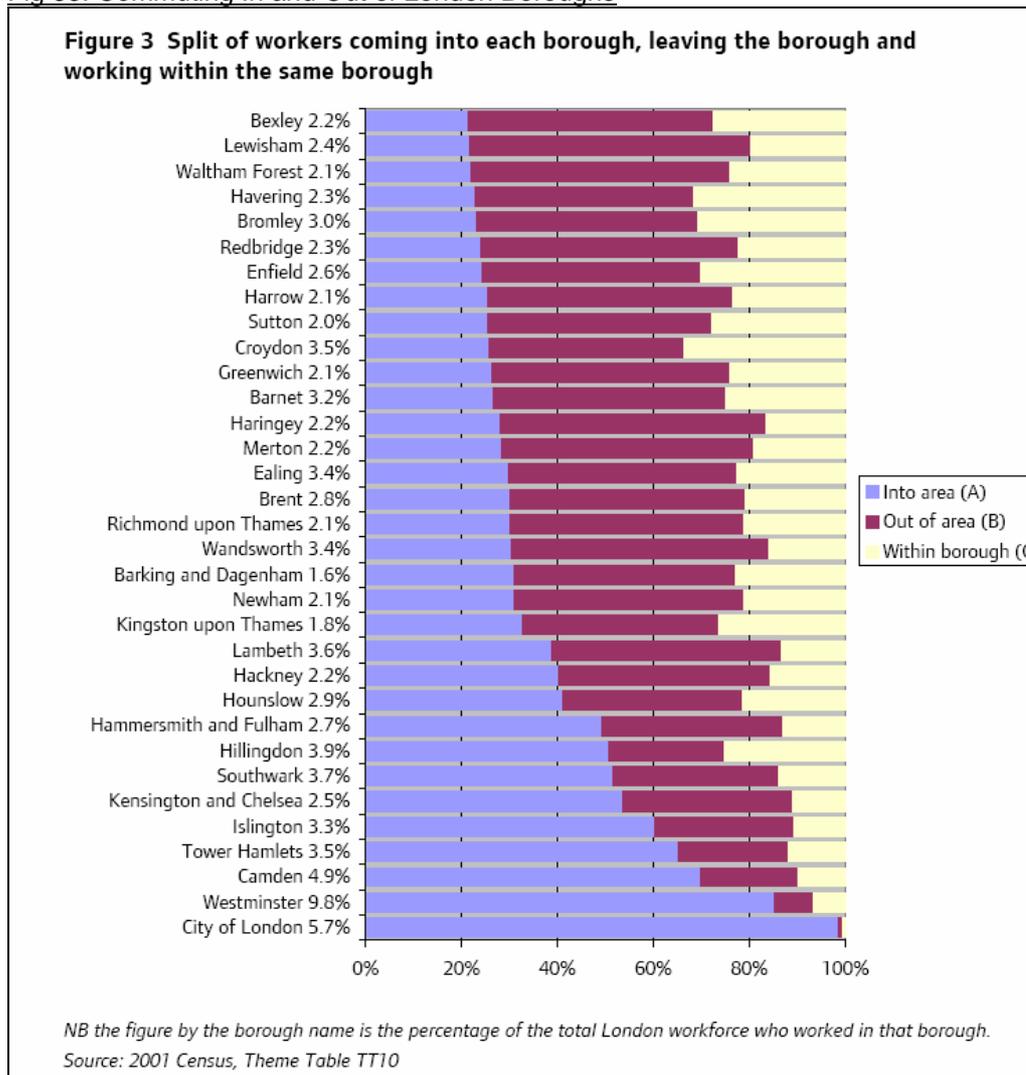
5.9

- **Waltham Forest has one of the highest net outflow of commuters in London. More than half commute into central London, Westminster being the most popular destination.**
- **A high proportion of people working in Waltham Forest also live in the borough.**

### In Detail

5.10 Waltham Forest has one of the highest net outflows of commuters. The proportion of people commuting out of the borough daily compared to the amount of people commuting into the borough was only larger in Lewisham and Bexley. The table below presents a London-wide comparison by borough:

Fig 83: Commuting In and Out of London Boroughs



5.11 62,981 people commute out of Waltham Forest daily. Out of this total **34,103 people commute into the central London area daily** from the borough. This is a fairly average level in comparison to other London boroughs: Wandsworth has the highest amount of people commuting into central London at 85,069 people. The table below outlines some useful comparisons with other London boroughs:

Fig 84: Commuting Into Central London

<b>No. Workers Commuting into Central London</b>			
<b>Borough</b>	<b>City of London</b>	<b>Westminster</b>	<b>Rest of central London</b>
Wandsworth	13,942	46,254	24,873
Hackney	5,179	9,981	23,411
Waltham Forest	<b>6,344</b>	<b>10,315</b>	<b>17,744</b>
Barking and Dagenham	3,639	3,280	8,296

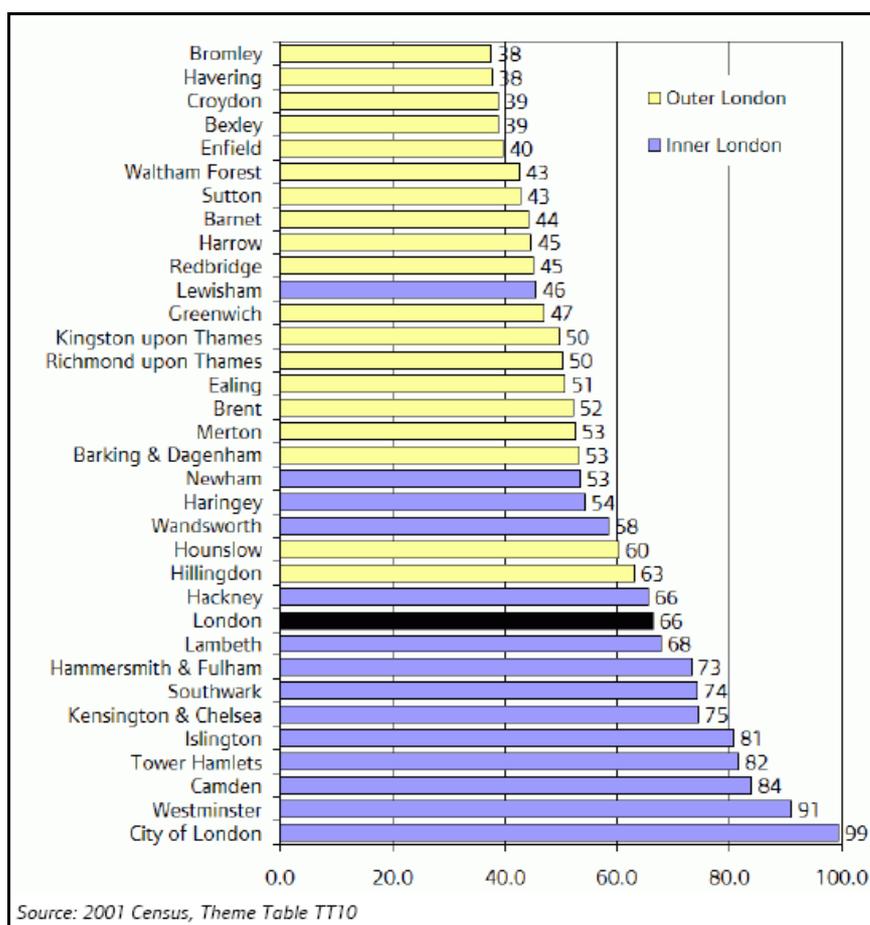
5.12 The borough's biggest overall commuter flow is from Waltham Forest to Waltham Forest. 28,062 people commute within the borough of which 11,842 travel by car. 8,072 Waltham Forest residents commute by the tube into Westminster daily, which is the **9<sup>th</sup> biggest commuter flow, by underground**, in London. The table below outlines the biggest commuter flows by underground in London:

Fig 85: Biggest Commuters Flows in London

<b>Biggest London Commuter Flows</b>	<b>No. of People</b>
Lambeth to Westminster	11,452
Wandsworth to Westminster	11,270
Haringey to Westminster	10,275
Barnet to Westminster	9,531

5.13 Generally, outer London boroughs' workforces are residents of the borough itself. Workforces in inner London tend to have a higher ratio of non-borough residents. For example, 91% of the workforce of Westminster commute into the borough, whereas only 38% of the Bromley's workforce commute into Bromley from outside the borough. 43% of the workforce in Waltham Forest are not borough residents, which is the 6<sup>th</sup> lowest rate in London. (57% of the Waltham Forest workforce are borough residents). The graph below gives a good London comparison of the percentage of the workforce who commute to the borough daily:

Fig 86: Proportion of Workforce Who Commute Into the Borough



## Working from Home

### Summary

5.14

- The proportion of people working from home is increasing in Waltham Forest but still lags behind other boroughs

### In Detail

5.15 London experienced a **134% increase in 'working from home'** between 1991 and 2001 from 122,420 to 285,935 people. Similarly, there was a 135% increase in the number of people working from home in Waltham Forest. However, the borough still lags behind other boroughs in terms of the proportion of home workers to other workers. Waltham Forest has the 2<sup>nd</sup> the lowest rate in London. Only Barking & Dagenham had a lower rate in 2001. The table below outlines the proportions of the current workforce in different London boroughs that work from home:

Fig 87: Home Working in Waltham Forest and London

<b>Borough</b>	<b>% Workforce that are home workers</b>
<b>Waltham Forest</b>	<b>6.9</b>
Barnet	10.6
Bexley	7.3
Hackney	8.8
Haringey	8.8
Barking and Dagenham	6.1
London	8.8

5.16 The low rate of home working could be due to the heavy concentration of public sector employment in the borough. Public sector employment, such as health and education, tends to naturally require people to work at their place of employment more so than industries in the private sector. However, it could also be due to the low skills levels of residents, which usually means that they have jobs that require them at the workplace.

## Chapter 6: Our Environment

6.1 In this chapter we give an overview of environmental challenges and issues facing the borough under the following headings:

- **The climate change challenge and carbon dioxide emissions**
- **One planet living and use of natural resources**
- **Green open space**

### Climate Change and Carbon Dioxide Emissions

#### Summary

6.2

- **The borough's current performance on carbon emissions is largely in line with the rest of London**
- **The borough's carbon footprint is more akin to suburban outer London boroughs than to inner London (i.e. high domestic emissions rather than commercial/industrial)**

#### In Detail

6.3 Dealing with the challenge of climate change is a key priority for the UK government. The UK agreed to a 20% reduction in carbon emissions from 1995 levels along with all other countries from the EU. The UK '**draft Climate Change Bill**<sup>29</sup>' places more stringent targets with a 26-32% cut by 2020 and a 60% reduction by 2050 on 1990 levels. The **Mayor's Climate Change Action Plan**<sup>30</sup> outlines rapid 60% cuts for London by 2025 on 2000 levels of carbon emissions. These targets will help ensure London makes a positive global contribution to tackling climate change as a leading sustainable world city. The graph below demonstrates the cuts proposed by the Mayor of London.

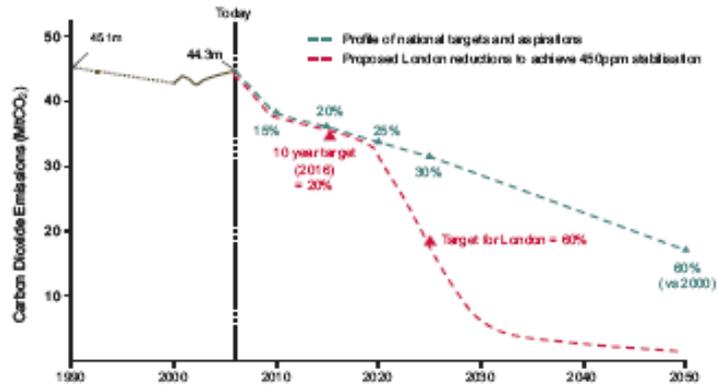
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<sup>29</sup> DEFRA Draft Climate Change Bill (2007)

<sup>30</sup> GLA Climate Change Action Plan (2007)

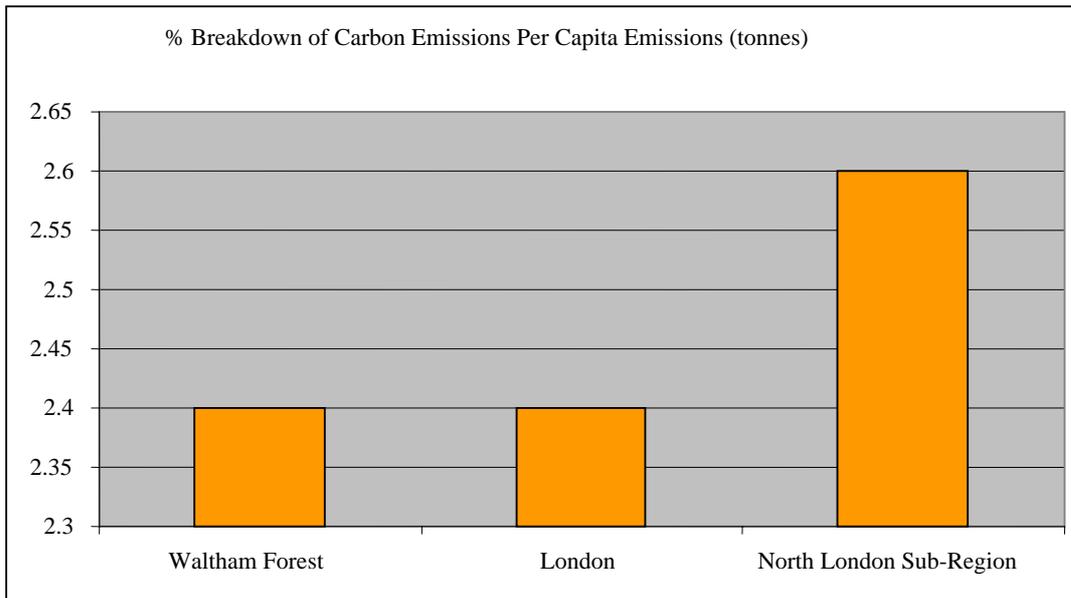
Fig 88: Cuts in London's Carbon Emissions

Figure ii Potential London CO<sub>2</sub> trajectories (excluding aviation)



6.4 The borough's performance on carbon emissions is roughly equal to the national and regional averages. According to DEFRA statistics presented in the graph below, the per capita carbon footprint of Waltham Forest is roughly equal to the London average.

Fig 89: Carbon Emissions Per Capita in Waltham Forest and London

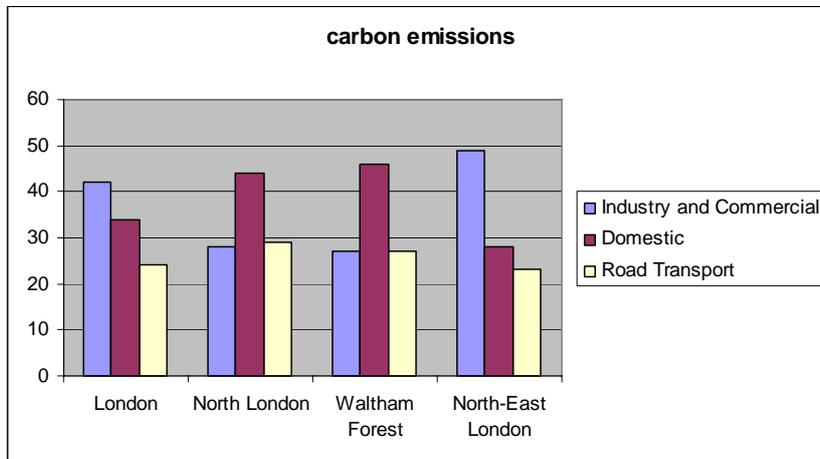


6.5 Yet, the precise make-up significantly differs from London's footprint: there are a higher proportion of domestic emissions than commercial and industrial emissions, as the graph below demonstrates. The precise make up of Waltham Forest's carbon footprint is closest, in fact, to the outer north London boroughs. It follows the suburban north London patterns of Barnet, Enfield and Haringey, far more than it resembles the commercial and industrial patterns of east London boroughs, such as

<sup>31</sup> Carbon Emissions statistics: DEFRA E-Digest of Environmental Statistics

Tower Hamlets and Newham. The graph below gives a snapshot picture of carbon emissions in 2004.

Fig 90: Carbon Footprints in Waltham Forest and London



## One Planet Living and Natural Resource Use

### Summary

6.6

- The borough performs in line with the rest of London for use of natural resources including energy and waste
- Like London, Waltham Forest's consumption of natural resources has increased significantly over the past 30 years – water use has almost doubled; energy use is up by 16%; and waste has been growing 2.5% each year.
- Recycling in Waltham Forest is above average levels in London: the rate increased from 6.8% in 2000/01 to 21.85% in 2005/06 and the borough is on course for meeting its target of 50% by 2012.

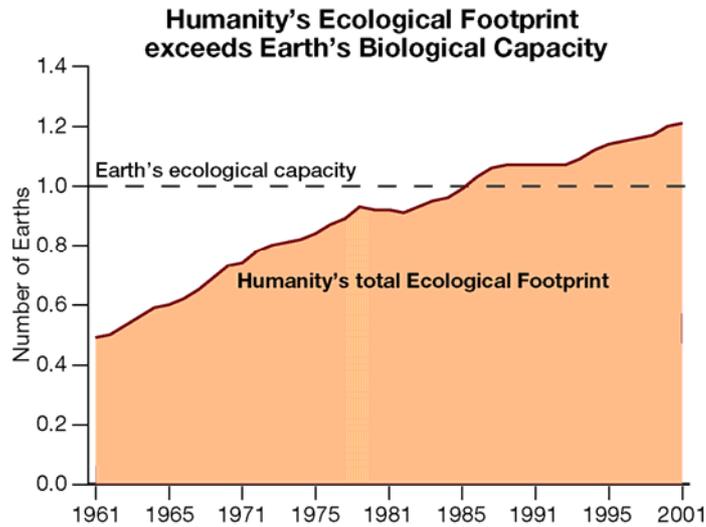
### In Detail

#### One Planet Living

6.7

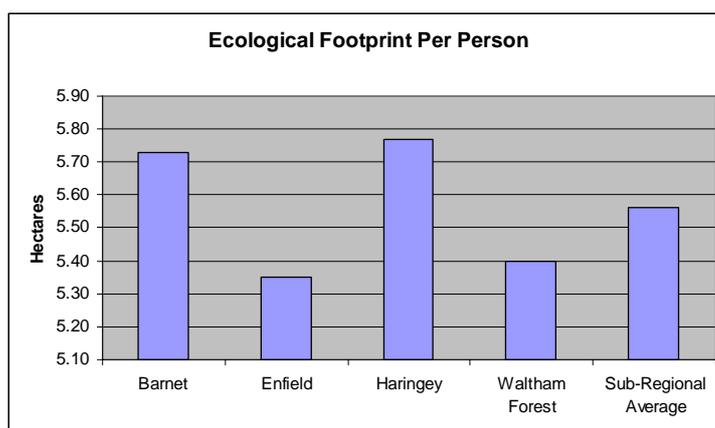
One Planet Living is the concept of living within the one planet's natural resources. The world's present ecological footprint is 2.2 hectares (ha) per person, which is 0.4 ha too large. 1.8 ha is the one planet ecological footprint for sustainable living. In short, the world as a whole is using 20% more resources than it should. The figure below illustrates the rising use of resources by humanity and the earth's ecological capacity.

Fig. 91: The Ecological Capacity of Earth



- 6.8 The UK's ecological footprint is 5.4ha per person, which is 65% over the earth's capacity. Yet, in comparison to other developed countries, it does not fair badly. London has a larger footprint at 6.05ha per person: this means that on average each Londoner uses 4.8ha more than he/she should according to ecological studies. The graph below presents a snapshot of the relative footprints of different countries.
- 6.9 Waltham Forest's ecological footprint is slightly below the London and north London average. It performs well against its neighbouring boroughs as the graph demonstrates. Yet, it is still well above a one planet footprint of 1.8ha.

Fig 92: Eco Footprints in Waltham Forest and North London



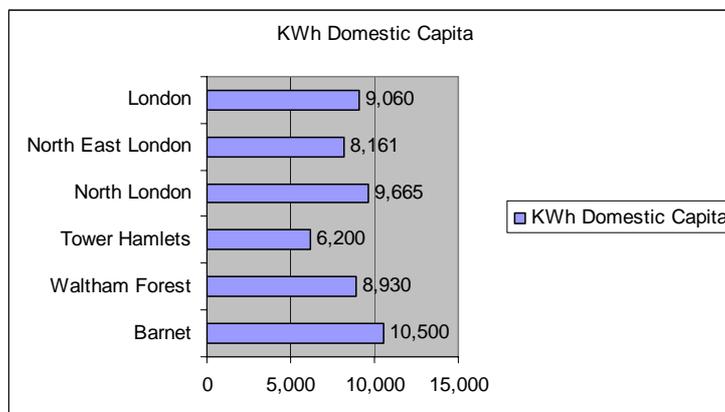
## Use of Natural Resources

6.10 The consumption of energy, water and the creation of waste has risen continuously in London and the rest of England. There has been a strong link between increasing economic prosperity and the use of natural resources. Below are some key facts to illustrate this trend at regional level:

1. The amount of water used per person daily, in London, has risen from 87 litres (1961) to 146 litres (1999). This translates into an increase of over 75% <sup>32</sup>.
2. London's energy use has increased by 16% over the period 1965-1999 whilst population decreased by 7%. This growth has been most pronounced in the commercial sector: a 65% increase in energy use from 1973 to 1996.
3. Since 1986 waste has grown by 2.5% annually.

6.11 Waltham Forest's consumption of natural resources is, as the eco footprinting exercise demonstrates, roughly average to the UK's performance. The borough's domestic energy consumption in Kilo Watt hours (KWh), shown below in the graph, is roughly equal to the London and outer north London averages.

Fig. 93: Domestic Energy Use in Waltham Forest and London



6.12 The borough has made recent moves to increase the amount of waste it recycles. Importantly, Waltham Forest's rate of recycling and composting increased from 6.8% in 2000/01 to 21.85% by 2005/06<sup>33</sup>. The Community Strategy seeks to increase the recycling rate to 30% by 2009 and 50% by 2012. The borough is one of the better performing local authorities on waste and recycling in London.

<sup>32</sup> GLA 'Draft London Water Strategy' (2007)

<sup>33</sup> [www.capitalwastefacts.com](http://www.capitalwastefacts.com)

## Green Open Space

### Summary

6.13

- **Waltham Forest is part of two wider green chains or networks**
- **Waltham Forest has more green space than any London borough north of the Thames, but a considerably high proportion is in the north**
- **Parts of the south suffer from a lack of small local parks**

### In Detail

#### Green Networks In and Around the Borough

6.14 Waltham Forest forms an essential component of the emerging 'Green Arc' and 'East London Green Grid' sub-regional green networks. There are also a number of strategic green chains and networks, such as the 'Capital Ring' that runs through parts of Waltham Forest, and attempts to provide a network of multi-functional green spaces. The map below illustrates the London 'Green Arc':

Fig 94: Green Arc of North London

Map 4D.3 Green Arc Initiative Areas



6.15 According to the London Plan, the entire borough has sufficient access to regional, metropolitan open land and the green belt<sup>34</sup>. There is over 2,000 ha of strategic green space. The borough has more strategic green space, according to a GLA study, than any other borough in north or north east London. The table, taken from information in the GLA study, presents a profile of the differences in green space provision between boroughs in Waltham Forest's sub-regions.

<sup>34</sup> North London Sub-regional Development Framework (2004)

Fig 95: Green Space Provision in North East London

Strategic Green Space in North and North East London <sup>35</sup>	
Area	Hectares
Barking and Dagenham	321.74
City of London	0
Havering	1,643.4
Newham	55.39
Redbridge	1,068.4
Tower Hamlets	136.32
Enfield	618.76
Haringey	329.75
<b>Waltham Forest</b>	<b>2,037.85</b>

### Local Green Open Space in the Borough

6.16 The borough contains a wide array of local parks and green spaces that make up around 378 ha of open space in the borough. These spaces are unevenly distributed in Waltham Forest.

- **The north of the borough** has a large number of parks, open spaces, excellent access to regional parks and a considerably high provision of allotments.
- **The centre of the borough** has a decent supply of local green spaces and parks, but according to recent resident surveys they are not managed as well as other parks and spaces in the borough. Moreover, the town centre suffers from a lack of high quality public realm areas. The Prince's Foundation commented on the shortage of green spaces in the centre of Walthamstow as part of this masterplan study.
- **The south of the borough**, particularly in Leytonstone, has a lack of local green spaces or pocket parks. But some parts are closely located to major green spaces, such as in the case of north Leytonstone and its proximity to Wanstead Flats in the neighbouring Redbridge.

6.17 The table below presents the stark difference in green space provision between the north and south of the borough.

Fig 96: Levels of Local Green Space Provision Across the Borough

Town	Local Green Space <sup>36</sup>
North	162.714 ha
Centre	154.447 ha
South	55.332 ha

<sup>35</sup> GLA State of London's Children (2004)

<sup>36</sup> Green Space Statistics compiled by LB Waltham Forest Officers

6.18 Even more stark is the difference at ward level:

Fig 97: Green Space Provision Between Wards in Waltham Forest

<b>Leytonstone (South)</b>	<b>2.293</b>
<b>Larkswood (North)</b>	<b>59.776</b>

## Chapter 7: Our Identity

7.1 This chapter considers some key issues about the borough's identity:

- **The main thoroughfares of Waltham Forest**
- **Town centres in Waltham Forest**
- **City or Suburban Borough**
- **East or North London**

### The Main Thoroughfares of Waltham Forest

#### Summary

7.2

- **The borough's main thoroughfares are in a state of decay and do not project a positive image of the borough**
- **The design of the borough's streetscape and public realm does not foster walkability around neighbourhood centres**

#### In Detail

7.3 Main routes are very important in projecting an image of the borough. Research by the Centre for Architecture and the Built Environment (CABE) has recognised the value of good quality street design and management<sup>37</sup>. The state of an area's main thoroughfares can contribute to increasing inward investment and business formation in an area.

7.4 Waltham Forest's main routes do not project an attractive streetscape. Thoroughfares such as Lea Bridge Rd, Leyton High Rd, Leytonstone High Rd, Hoe St, Forest Rd, Wood Street and Chingford Mount, project a poor image because of urban decay including low quality shop frontages, poor street furniture, narrow pavement areas and inappropriate car parking arrangements on roadsides. This poor image is despite the fact that in many cases the building form is of good quality. These are often 2 and 3 storey Victorian buildings which are well built using attractive materials, with good design and layout. But they have not been conserved often suffering from poor quality conversions in the absence of good design guidance and the overpowering image is of poor quality shop fronts at ground floor level.

7.5 **In the last BVPI survey 38% respondents listed 'Clean Streets' as something that needed most improving in the borough, which was the 3<sup>rd</sup> highest priority.**

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<sup>37</sup> CABE 'Paved With Gold: the Real Value of Street Design' (2007)

Consultations on planning policy frameworks in Blackhorse Lane and Walthamstow Town Centre have also highlighted people's dissatisfaction with the urban streetscape in parts of the borough.

- 7.6 The lack of urban design standards and proactive planning guidance has also contributed to making areas of the borough less suitable and attractive for shopping, walking and other uses.

## Towns Centres in Waltham Forest

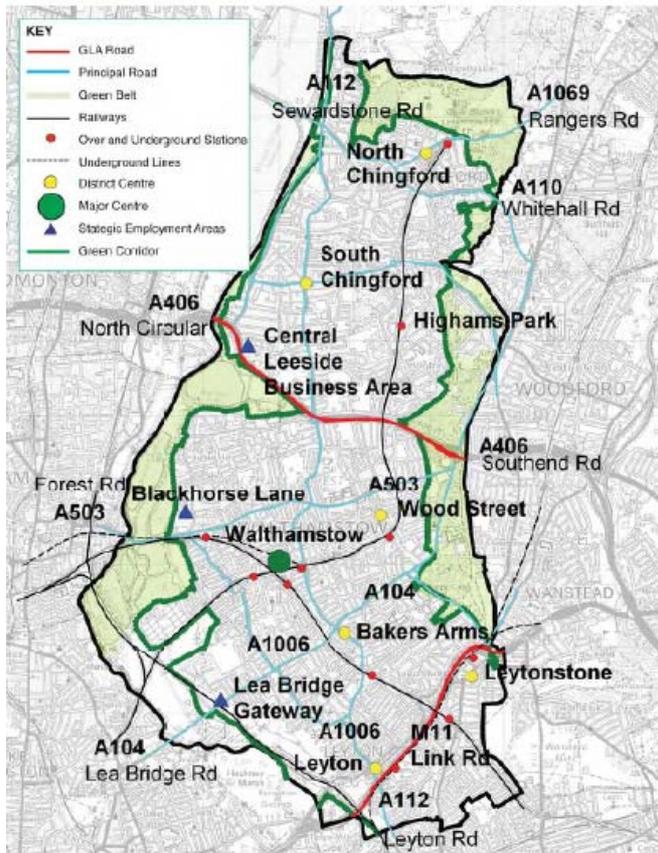
### Summary

- 7.7
- **Although the borough has a number of centres, Walthamstow is the only one designated by the London Plan as a major town centre**
  - **Inward investment has not consistently flowed into any of the borough's major centres**

### In Detail

- 7.8 Residents in Waltham Forest usually associate themselves with one of the four towns; Leyton, Leytonstone, Walthamstow or Chingford. The availability of underground stations in 3 of the 4 towns plus railway stations throughout the borough reinforce the standing of each "town".
- 7.9 However, the London Plan designates Walthamstow as the borough's only major town centre. The town itself is the only major retail centre in the borough to provide a broad shopping offer, a nationally significant street market, and the only provision of office floorspace in the borough that is worthy of mention.
- 7.10 In addition the borough also contains a collection of small local and district centres in the south and north. Leyton and Leytonstone are the key centres of the south. Chingford Mount and Highams Park serve a number of residents in the north of the borough. Although these are locally important centres, they do not have the economic strength to compete with bigger centres, such as Lakeside, Ilford and Bluewater (or Stratford in the future if plans for Stratford City are realised). The map below demonstrates all centres in the borough.

Fig 98: Town Centres in Waltham Forest



7.11 Commercial development and private investment has not been attracted into the borough in any major way as it has done in other centres in London (see previous chapter). For a borough with such strong transport links, it is surprising that locations such as Walthamstow have not acted as a magnet for inward investment.

## City or Suburban Borough

### Summary

7.12

- The centre and south of the borough are very similar to inner London in a number of key socio-economic and physical indicators
- The north differs from the rest of the borough: it is far more suburban both in its physical and socio-economic character than either the centre or south

### In Detail

#### The Shaping of Waltham Forest

7.13 Although Waltham Forest has never been at the geographical or economic heart of London, it has been deeply affected by the development of London as a world city since the Victorian period. The advent of the industrial revolution and the birth of suburban railways transformed a collection of leafy settlements in Essex into a part

of modern Victorian London. Developments in industry led to the growth of a strong industrial base along the Lea Valley in Walthamstow and Leyton, which provided a stable employment base in manufacturing until the late 20<sup>th</sup> century. The growth of these industries, in the borough and elsewhere in neighbouring boroughs, coupled with the growth of suburban rail in the mid 19<sup>th</sup> century transformed Leyton, Leytonstone and Walthamstow into metropolitan centres of London. Later in the interwar period suburban housing filled the landscape of leafy Chingford: transforming a collection of villages in a part of former south Essex into a desirable outer London suburb.

### A City Borough

- 7.14 The following table comparing characteristics of London as a city with Waltham Forest would imply that the greater part of the borough (the centre and south) does fit the “city” description.

Fig 99: Characteristics of London

<b>Characteristics of London</b>	<b>Matched in Waltham Forest?</b>
Victorian architecture/post war estates	Yes – Centre and South
Rich in culture and history	Yes – Centre and South
Strong financial, business and creative sectors	No
Cosmopolitan	Yes – Centre and South
Tolerant communities	Yes
Highly populated	Yes
Public services under pressure	Yes
Polarisation of rich and poor	Yes (but does not quite match higher income end)
Mix of social rented and owner-occupied housing	Yes – Centre and South
Rapidly rising house prices and land values	Yes
Demand for social housing exceeds supply	Yes
Middle earners under-represented	Yes – Centre and South
Gateway for crime	No
Expensive commercial property	No
Vibrant daytime and evening economy	

7.15 At present the borough contains a mix of housing styles. The north of the borough (certainly north Chingford) displays the characteristics of a dormitory suburb – detached and semi-detached houses with gardens and the start of Epping Forest before it moves into Essex. However the centre and south of the borough is dominated by Victorian housing – much of it terraced – and has considerably more social housing units in typical post war estates – all of which tends much more towards a “city” image typical of inner London. Moreover whilst north Chingford espouses reasonable levels of affluence rather than deprivation the opposite is true in many neighbourhoods in the centre and south of the borough where social, economic and environmental issues (e.g. poverty, worklessness and congestion on main thoroughfares) mirror the deprivation associated with much of inner east London. 2001 Census data presented below demonstrates the difference in housing styles between the three areas.

Fig 100: Housing Stock in Waltham Forest

(ONS: 2001, KS19 )	Total	Detached/ Semi-Detached	Terraced	Flats
LBWF	92,248	19.69%	41.55%	38.54%
North	25,511	37.58%	36.32%	26.05%
Centre	38,941	13.18%	43.68%	43.06%
South	27,796	12.50%	43.61%	43.89%

## East or North London

### Summary

7.16

- **Waltham Forest is on the doorstep of a number of key opportunities in north and east London**
- **Plans for the regeneration of the Lower Lea Valley in East London are more advanced than the Upper Lea Valley in north London**

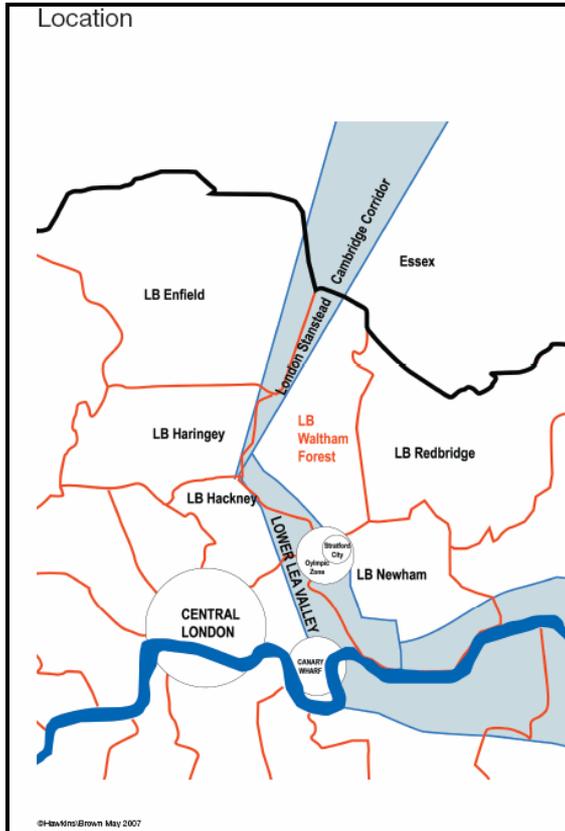
### In Detail

7.17 There may be confusion about whether Waltham Forest is an East London borough focused on the Olympic and Paralympic Games and the Lower Lea Valley or a borough whose key focus is north towards the Upper Lea Valley and the London-Stansted-Cambridge corridor.

7.18 Wider strategic plans denote Waltham Forest as a north east London borough and draw attention to the social, economic and environmental opportunities of being a part of the Upper Lea Valley and the London-Stansted-Cambridge corridor. The southern end of the borough has its borders with two east London boroughs (Hackney and Newham) and Waltham Forest does actually constitute a part of the Lower Lea Valley. The siting of the 2012 Olympic and Paralympic Games in east

London, with Waltham Forest as one of the 5 east London Olympic Boroughs, gives further credence to Waltham Forest as an east London Borough, attached to the Lower Lea Valley and with links to the Thames Gateway. The diagram below outlines these potential areas of opportunities surrounding Waltham Forest.

Fig 101: Waltham Forest Growth Areas in London and the South East



7.19 Plans for and commitment to investment in the Lower Lea Valley are considerably more advanced than opportunities in north London. In short, the regional and sub-regional institutional infrastructure for the regeneration of East London is fully in place. The presence of an Urban Development Corporation, an Opportunity Area Planning Framework, and an east London focused London Plan means that the regeneration of the Lower Lea Valley is further advanced than development of the Upper Lea Valley.

## **SECTION C: The Key drivers of change**

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## Chapter 8: Demographic Change in Waltham Forest

### A Growing National Population

- 8.1 The UK population is projected to increase by 7.2 million over the period 2004 to 2031, and continue to grow still further after that date. Between 2004 and 2021 it is projected to rise from 59.8 million to 64.7 million, a rise of almost 5 million, or 8%. This is due to natural increases (more births than deaths) and a continuing net inflow of migrants. It is estimated that up to half a million workers may have come to the UK from Eastern Europe since May 2004<sup>38</sup>, although Labour Force Survey data suggest that perhaps around half of these may since have returned home. The population is also likely to contain more 'older persons' (over 65s) as people live longer due to better technology and social care practices.

### Rapid Population Growth in London

- 8.2 **The Greater London Authority (GLA) estimate London's population at 7.47 million, and projected growth of 790,000 to 8.26 million<sup>39</sup> by 2026.** Over this period the number of households is expected to rise from 3.2 million to almost 3.7 million, and 430,000 of this increase will comprise one-person households. The projections in age structure for the capital in 20 years' time show the biggest age rises among people of working age (25-65 years).

### Growth in Waltham Forest

- 8.3 The recent GLA high level forecast for the borough's population, for 2007, is 226,000. However, recent advice from the GLA indicates that the 'low growth figure' of 221,800 might in fact be more accurate than the 'high growth figure' of 226,000. We have, therefore, based our estimates around the 'low growth estimates' to ensure consistency across population and household growth estimates. It is also important to note that population estimates will be released in the near future, which will suggest, due to lower than expected international migration, lower population growth in London. Therefore, population estimates for the borough need to be treated with a degree of caution as they are prone to change and are unlikely to stay fixed. It is therefore important that growth figures are continuously updated and their significance re-assessed.

8.4 The GLA 'low forecast' predicts a rise of 9,752 persons **from 221,800 in 2006, through to 231,552 in 2026<sup>40</sup>**. The population increase is largely the result of natural increases, via more births and less deaths, because- as the table below shows- total migration is a net loss to the borough:

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<sup>38</sup> Price Waterhouse Coopers 'UK Economic Outlook' (March 2007)

<sup>39</sup> GLA '2006 Round Demographic Projections: Low Projection' (Dec 2006). The London population growth figures have been based on the 'low growth figure'. Advice from the GLA has indicated that this is more accurate, at present, than the 'high growth figure'

<sup>40</sup> There is a later population forecast for population growth of 11,281 persons. However, it is not yet available for ethnicity, age or household growth. In order to ensure overall consistency, we have, therefore, relied on the '2006 Round' of projections

Fig 102: A Breakdown of Population Growth in Waltham Forest

Trend	Growth in Persons (2006-2026)
Births and Deaths	47,206
Total Net Migration	-37,454
Net Population Growth	9,752

- 8.5 According to GLA 'low population projections', the borough's age structure will contain more working age people and older persons in the borough, as a whole. The rise in children and young people (0-24 years) is relatively small in comparison to that of other age groups in the borough. The table below shows GLA-projected changes to the borough's age structure:

Fig 103: A Breakdown of Population Growth by Age in Waltham Forest

Age Group	Population Increase (2006-2026)
Children & Young People (0-24)	579
Working Age People (25-64)	4,696
Older Persons (65+)	4,477

- 8.6 However, changes in the age structure are also affected by the provision of housing supply and public service provision among other factors in the borough. The manner in which these elements are adjusted will affect, to some extent, the future age structure of the borough.

### Changes in the Ethnic Make-Up of Waltham Forest

- 8.7 The population of Waltham Forest in line with London is set to become increasingly diverse. GLA 'low population' estimates predict that there will be a net loss of 13,349 white persons from the borough between 2006 and 2026: persons from BAME groups will compensate for this loss. In particular there will be significant rises among Pakistani, Black African, Caribbean, Other Asian and Other (mixed race) groups<sup>41</sup>. The table below illustrates the projected changes:

Fig 104: A Breakdown of Population Growth by Ethnicity in Waltham Forest

Ethnicity	2001	2006	2016	2026	Change 2006-16	Change 2006-26
White	143,187	133,028	124,064	119,678	-8,964	-13,349
Black Caribbean	18,041	19,314	21,129	21,891	3,089	2,577
Black African	12,886	14,452	16,505	16,985	2,053	2,533
Black Other	7,549	8,479	9,503	9,918	1,024	1,439
Indian	7,801	7,826	8,388	8,725	563	899
Pakistani	17,581	19,735	23,730	26,229	3,994	6,494
Bangladeshi	2,196	2,408	2,749	2,847	341	439
Chinese	1,463	1,776	2,320	2,614	545	839
Other Asian	6,799	8,107	10,285	11,451	2,178	3,344
Other	4,513	6,632	9,736	11,169	3,105	4,538
<b>All Ethnicities</b>	<b>222,015</b>	<b>221,756</b>	<b>228,409</b>	<b>231,508</b>	<b>6,653</b>	<b>9,752</b>

<sup>41</sup> GLA '2006 Round Demographic Projections' (Dec 2006)

- 8.8 There is also evidence of increasing diversity in terms of the number of people with, disabilities. The 'Learning Disability Task Force' predicts that there will be a 15% increase in the numbers of people with learning disabilities from 2003 to 2011 and a 20% increase by 2021 across the UK<sup>42</sup>. The increase is due partly to increasing numbers of children with learning difficulties surviving into adulthood. It has not been possible to evidence future trends for other forms of disability over the next twenty years.
- 8.9 It is clear that these changes in the population's diversity will intensify social cohesion challenges in the borough. Relations between individuals, communities and institutions will increasingly be placed under strain as competition for public services and housing becomes more intense. However, the council and its partners have an important role in constructively managing these tensions and meeting the social cohesion challenges of the next 20 years.

### Single Person Household Growth

- 8.10 The latest GLA estimates on household growth for the borough and London predict a strong growth of single person households. As cultural and social attitudes change more people will decide to live in single person households. The average household size will fall across London over the next twenty years<sup>43</sup>.
- 8.11 Between 2006 and 2026 Waltham Forest will experience a growth 11,651 households. It is estimated that 10,213 of these households will be single person households<sup>44</sup>. A fuller breakdown of household trends is presented below:

Fig 105: A Breakdown of House Growth in Waltham Forest

Household Type	2001	2006	2016	2026	Change 2006-16	Change 2006-26
Married	32,860	30,224	26,178	22,985	-4,046	-7,239
Cohabiting	8,048	9,519	12,506	14,442	2,987	4,922
Lone Parent	9,708	10,785	12,223	12,628	1,438	1,844
Other Multi-person	9,501	9,503	10,418	11,414	916	1,911
One person	29,791	32,058	37,637	42,272	5,579	10,213
<b>Total households</b>	<b>89,907</b>	<b>92,089</b>	<b>98,962</b>	<b>103,740</b>	<b>6,873</b>	<b>11,651</b>
<b>Average household size</b>	<b>2.450</b>	<b>2.390</b>	<b>2.291</b>	<b>2.215</b>	<b>-0.10</b>	<b>-0.18</b>

- 8.12 However, it must be emphasised that these population and household growth forecasts are very dependent on **the supply of housing in the borough and the rest of London**. If housing targets and subsequently the supply of housing was to alter then household growth forecasts might change accordingly.

<sup>42</sup> Learning Disability Taskforce 'Annual Report' (2003)

<sup>43</sup> GLA '2006 Round Demographic Projections' (Dec 2006)

<sup>44</sup> GLA '2006 Round Demographic Projections' (Dec 2006)

## Chapter 9: Housing Demand and Supply

### Housing Demand

- 9.1 National forecasts suggest that affordability will continue to be a problem for middle and low-income households. The National Housing and Planning Advice Unit suggest that the strong demand and limited supply of housing means the problem of affordability is likely to get worse over the next two decades. By 2026 the cheapest 25% of houses will cost 10 times the average earnings of the poorest 25% of people. At the moment these houses cost seven times earnings; a decade ago they were only four times<sup>45</sup>.
- 9.2 The shortage of housing is greatest in London and the south-east of England. The GLA sees a need for an additional 353,000 homes over the next 10 years<sup>46</sup>. This is a result of migration, household formation and homeless households as the table sets out:

Fig 106: A Breakdown of Housing Need in London Over the Next 10 Years

Housing type	Inward flow	Outward flow	Net gain (loss)
<b>10 YEAR REQUIREMENT</b>			
UK Migration	518,200	1,058,400	(540,200)
International migration	690,500	434,000	256,500
Indigenous change	846,400	225,600	620,900
Established household moves	1,448,700	1,448,700	-
Homeless households	16,400	-	16,400
<b>TOTAL</b>	<b>3,520,200</b>	<b>3,166,700</b>	<b>353,500</b>

Source: GLA

- 9.3 Although it has not been possible to produce similar information for Waltham Forest, population estimates mentioned earlier, indicate that the natural increase in population is largely responsible for growth in the borough.
- 9.4 It is expected, on the basis of latest GLA estimates, that there will be a demand for an extra 11,651 new households in Waltham Forest. 10,213 of these households will be single person households.
- 9.5 In addition to 'new demand for housing' the borough will also have to deal with its existing backlog of demand for housing. As was mentioned in the 'Where We Are Now' section, over 16.1% of households in the borough were, in 2001, living in overcrowded housing with areas in the south having over 20% households living with overcrowded housing<sup>47</sup>. There is also demand for additional social housing. Latest figures indicate that there were 1,731 persons were living in temporary

<sup>45</sup> National Housing and Planning Advice Unit 'Homes To Cost Ten Times Annual Earnings' (June 2007)

<sup>46</sup> GLA 'Housing Evidence Base' (2005)

<sup>47</sup> Office of National Statistics 'UV59 2001: Occupancy Rates'

accommodation (2004/5) and 11,059 households were on the Waltham Forest Housing Register for social housing (2005/6).

### Housing supply and Future Capacity of Waltham Forest

- 9.6 The Mayor of London is proposing that Waltham Forest should build 665 homes annually over the next ten years<sup>48</sup>. This would translate into an extra 6,650 new residential units by 2016/17. The Mayor has not provided a housing target for the borough over the next twenty years. It is expected that the social housing development programme will provide 647 new units over the next five years. Moreover, evidence on flat conversions suggests that a substantial number of new smaller units will be created out of the existing housing stock. The '**Urban Capacity Study**' being conducted by Entec for LB Waltham Forest will report in more detail on these issues.
- 9.7 In the meantime, an initial scoping of Waltham Forest's key sites with Waltham Forest Planning Officers indicates that the borough has capacity to build more than the predicted GLA capacity of 6,650 units over the next twenty years.
- 9.8 The figure for housing capacity has been based on the following evidence:
- GLA 'London Housing Capacity Study' (2004)
  - LBWF 'Blackhorse Lane Interim Planning Policy Framework'
  - Indicative assessments on housing capacity from the Princes' Foundation study of Walthamstow Town Centre
  - Initial proposals for Whipps Cross, Highams Park, and Walthamstow Dog Track
  - Educated estimate for the number of units at Wood St station area
  - Council tax records for empty properties in the borough
- 9.9 The table below outlines the potential housing capacity of the borough:

Figure 107: Urban Capacity of Waltham Forest

Type of Development	Capacity	Evidence Base
Empty properties	1,714	Council Tax Records
Small sites/Infill development	3,099	London Housing Capacity
Major sites	5,678	Blackhorse Lane IPPF, Walthamstow Town Centre research by the Princes' Foundation, Initial proposals for Highams Park, Whipps Cross, Walthamstow Dog Track and Wood St- all estimates
<b>Total estimated capacity</b>	<b>10,491</b>	<b>See above</b>

<sup>48</sup> GLA '**Further Alterations to the London Plan**' (2006)

- 9.10 This figure also excludes any increase in housing through redeveloping some of the existing social housing stock, such as Avenue Rd and Marlow Rd estate. This could yield an extra 10-20% housing capacity on top of current social housing provision<sup>49</sup>. This also ignores private sector redevelopment encouraged for example by the advent of the 2012 Olympic Games.
- 9.11 On the basis of this evidence it can be assumed, with certain qualifications, that the borough could meet the **GLA's projected low growth of 11,651 households** if it was to secure development at the key sites identified at high enough densities.
- 9.12 These figures are based on a number of qualifications and assumptions:
- that the capacity for housing will not be affected by the demand for large multi-person/ family sized units (as this assumption could not be tested in this exercise);
  - empty properties can be filled;
  - there is no present existing backlog of housing need (this assumption will need to be tested in the Entec Study)
  - there is significant demand for residential units across the borough to make infill site development profitable in all areas;
  - there is significant development pressure and interest for residential development in Blackhorse Lane and Walthamstow town centre to deliver the estimated 2,500 units in Walthamstow town centre and 2,000 units in Blackhorse Lane;
  - major sites, such as Whipps Cross and Walthamstow Dog Track receive planning permission for substantial numbers of residential units (as current proposals indicate)
  - Wood Street is able to deliver on the estimated number of units anticipated by LBWF planners;
  - major residential developments and the large number of infill sites are not given planning permission at very low residential densities; and
  - developers, both large and small, refrain from long-term land banking in the borough and progress residential development within a reasonable timescale.
- 9.13 If, however, the borough was faced with the GLA's 'high population projection' it would face a more difficult challenge. Under this scenario it would have to provide 16,700 new households in Waltham Forest by 2026.
- 9.14 **Meeting the high population forecast would require a major rethink over the borough's densities and land use.** It is likely that it would not be possible to meet this growth if the borough did not develop at radically higher densities than those adopted previously. Moreover, the borough might also have to convert more of its employment and industrial land into high density mixed use residential areas.

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<sup>49</sup> Based on dialogue between LBWF planning officers and development officers from RSLs.

### Available housing and land for residential (and mixed use development)

9.15 The figures below based are on available information from the GLA 'Housing Capacity Study' and the 'London Development Database.'

Figure 108: Development Land in Waltham Forest

Land Type	Land (Ha)	Gross Density: Units per ha
Small site/infill	25.61	121
Major sites	94.66	60
<b>Total</b>	<b>120.27</b>	<b>73</b>

9.16 The density for major sites is significantly lower than small sites, because these sites will accommodate other uses and supporting infrastructure. The densities here are much lower than those planned for major new developments located close to transport nodes elsewhere in London, which should be around 165-275 units per ha<sup>50</sup>. The figures given here are therefore reasonably cautious.

9.17 If the borough was to plan for the 'high population forecast', of 16,700 new households, it would have to significantly increase the overall density on new developments to 139 units per hectare. Alternatively or additionally, the borough could release more of its employment and industrial land for residential or mixed use development to accommodate this growth.

9.18 **In summary if Waltham Forest was to achieve the GLA's high population forecast it would not be 'business as usual' for the borough.**

### Social Infrastructure and the Capacity of Waltham Forest

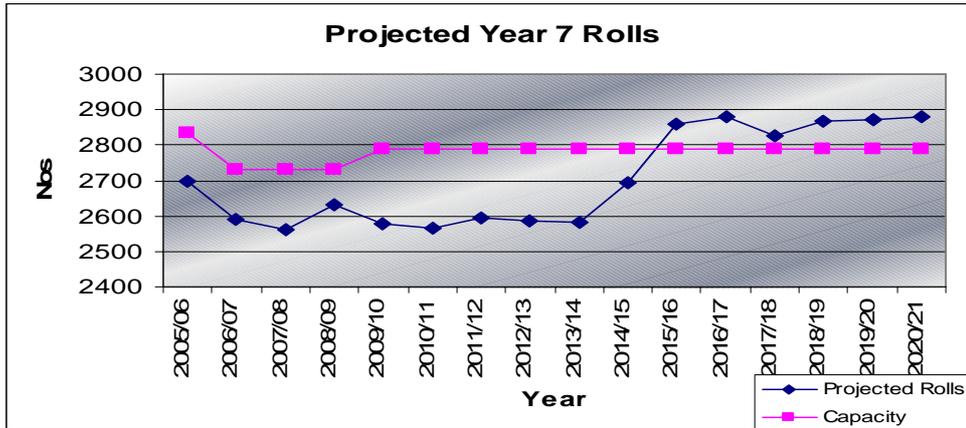
9.19 The social and community infrastructure needed to support household growth will place a strain the Council and its partners' available land and financial resources. The three biggest land-takes for social infrastructure will be schools, health centres and places of worship. It is very difficult on current information to assess whether Waltham Forest and its partner organizations will be able to meet demand placed on the social infrastructure.

9.20 Within the next ten years the capacity of existing primary and secondary schools will be reached as school numbers rise. The graph below demonstrates the predicted growth of school roll for secondary schools:

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<sup>50</sup> GLA 'Housing for a Compact City' (2004)

Figure 109: Projected Year 7 Rolls in Waltham Forest



9.21 These predicted school rolls generally accord with ‘**2006 Demographic Projections**’ for the future demographic profile of the borough.

9.22 **The Building Schools for the Future (BSF)** programme is already planned to accommodate an increase in pupil numbers by 2016/17. The BSF programme will draw on significant central government and private sector resources, which if efficiently deployed can help meet demand for educational services. The land required for the BSF programme is, however, not yet fully identified and could present significant issues for the high population forecast.

9.23 Although there is a range of health services people need, GPs are probably the most essential day-to-day health service for the majority of people. At present Waltham Forest’s ratio of GPs to population is 57 to every 100,000, which is in line with the average in England. The table below compares the borough against other boroughs in London:

Figure 110: GP Numbers in Waltham Forest

PCT	No. of GPs per 100,000
Waltham Forest	57
Barking and Dagenham	45
Enfield	58
Newham	63
Redbridge	51
<b>England</b>	<b>57</b>

9.24 Waltham Forest PCT predicts it will need another 25 GPs if the population rises to 250,000 over the long-term.

9.25 Presently, Waltham Forest PCT is developing its ‘Commissioning Strategy’. The strategy seeks to have fewer larger clinics. These new centres will provide a more comprehensive range of health services and will, hence, prevent people having to

make trips to hospitals for a range of health problems. Importantly, the PCT has already identified the land for these facilities.

9.26 Additionally, the borough's population with learning disabilities is set to increase by 20% by 2021, which will place extra demands on social healthcare.

9.27 One other important factor is places of worship, because the increase in ethnic and religious diversity will mean greater demand for places of worship in the borough. The resulting land-take for places of worship in the borough cannot be estimated at present on current data. Future work will need to take this into account along with other demands on social infrastructure.

## Chapter 10: London's Economic Growth - A Buoyant London Economy

### The UK Economy

- 10.1 Looking into the future, the Treasury average of medium-term **forecasts for growth are around 2.5% per annum** up to 2011<sup>51</sup>. (Over the same period unemployment is predicted to fall following a small rise over the next two years). The UK economy is still moving away from manufacturing and **towards services**, and over the next 20 years this is likely to continue<sup>52</sup>. It is likely that manufacturing activity will continue to transfer to Asia and increasingly to Russia and Eastern Europe. The UK financial sector is particularly well placed to take advantage of the opening of global markets; and business services generally are likely to expand. As consumers earn higher incomes, leisure spending and tourism is likely to increase. The increase in the number of older persons in the UK will prompt huge growth opportunities in health care.

### The London Economy

- 10.2 London is projected to grow faster than leading rivals such as Tokyo, New York, Chicago and Paris, moving up to 4th place in the world by 2020 according to a recent analysis of the UK's future economic prospects<sup>53</sup>. The latest employment projections estimate an increase of 912,000 jobs from 2006 to 2026 with over half those jobs coming from business services<sup>54</sup>. The table below outlines the main trends:

Fig 111: A Breakdown of Employment Growth in London

Sector	2006	2016	2026	Growth 2006-16	Growth 2006-26
Manufacturing	237,000	164,000	113,000	-73,000	-124,000
Wholesale	235,000	243,000	250,000	8,000	15,000
Retail	406,000	439,000	473,000	33,000	67,000
Business Services	1,142,000	1,453,000	1,702,000	311,000	560,000
Financial Services	331,000	327,000	376,000	4,000	45,000
Health and Education	710,000	728,000	742,000	18,000	32,000
Restaurants & Hotels	327,000	421,000	539,000	94,000	212,000
Other	1,199,000	1,263,000	1,304,000	64,000	105,000
<b>All Jobs</b>	<b>4,587,000</b>	<b>5,038,000</b>	<b>5,499,000</b>	<b>451,000</b>	<b>912,000</b>

- 10.3 London also has a large and growing creative sector and its rich cultural assets make it a major tourist destination. Tourism, as the table above demonstrates will fuel demand for growth in the hotel and restaurant sector.

<sup>51</sup> Forecasts for the UK Economy – A Comparison of Independent Forecasts, HM Treasury, May 2007

<sup>52</sup> Deloitte 'Economic Review Q2 2007' (2007)

<sup>53</sup> Price Waterhouse Coopers 'UK Economic Outlook' (March 2007)

<sup>54</sup> GLA 'Employment projections for London – GLA Working Paper 20' (2007)

10.4 The latest GLA ‘London Office Policy Review’ presents a growing office sector in London with rising demand over the next twenty years. The study expects 8,051,000 sq m of demand for office space between 2006 to 2026.

### Waltham Forest – economic prospects

10.5 The GLA<sup>55</sup> proposes that “the function of outer London locations is to accommodate employment growth of urban functions which cannot be accommodated outside London, and need to be protected. These include waste management, transport and logistics as well as a host of essential but low value-added and/or dirty services.” In the light of this, GLA employment projections show only a **low level of employment growth** in Waltham Forest over the coming decade.

10.6 As the LSE noted in their report on ‘Future Growth in the Outer London Economy’<sup>56</sup> outer London areas have experienced slower growth in recent years because they are weak in key growth sectors, such as the business, financial and creative services. Generally, more of their employment is geared towards closer and local markets, and they **lack the locational advantages** of either central London or outside London.

10.7 The GLA ‘London Office Policy Review’<sup>57</sup> noted that “the absence of potential office development in these (outer) boroughs may well be of local concern, but in most cases it derives from a recognition by developers ... that over a long period of time there has been **insufficient demand for offices** in these locations to make development viable”. Although there may be some spreading out of city activity beyond the City Fringe, it is unlikely, on current trends and activities, that Waltham Forest will attract significant business, financial and creative sectors. Therefore, recent economic forecasts by the GLA predict a modest growth for the borough over the next twenty years.

10.8 The latest GLA employment projections reveal that the borough, on present trends, is likely to only grow its employment base by 6,000 jobs over the next twenty years<sup>58</sup>. The table below provides some useful comparisons with other London boroughs:

Fig 112: A Breakdown of Employment in Key North and East London Boroughs

Area	2006	2016	2026	Growth 2006-16	Growth 2006-26
Newham	82,000	102,000	133,000	20,000	51,000
Hackney	102,000	111,000	122,000	9,000	20,000
Tower Hamlets	191,000	251,000	321,000	60,000	130,000
Waltham Forest	67,000	69,000	73,000	2,000	6,000
<b>Total job opportunities</b>	<b>442,000</b>	<b>533,000</b>	<b>649,000</b>	<b>91,000</b>	<b>207,000</b>

<sup>55</sup> GLA ‘Employment projections for London – GLA Working Paper 20’ (2007)

<sup>56</sup> GLA/LSE ‘Future Growth in the Outer London economy’ (Dec 2006)

<sup>57</sup> GLA ‘London Office Policy Review’ (2007)

<sup>58</sup> GLA ‘Employment projections for London – GLA Working Paper 20’ (2007)

10.9 The latest 'London Office Policy Review' predicted that demand for office space in the borough would be modest. Only 45,000 sq m of new office space would be needed to meet demand in the next twenty years. However, the study predicted that there would be demand for 252,000 sq m of office space across the outer north east London sub-region<sup>59</sup>. Therefore clear opportunities exist for the borough if the right policies and actions are taken to capture more of this demand for office growth.

### **Growth Areas**

10.10 Waltham Forest falls between the Lea Valley corridor, which is part of the London/Stansted/Cambridge growth area, and the Thames Gateway, incorporating Stratford City and the Olympics. In addition to its geographical location, wider strategic plans denote Waltham Forest as a north east London borough and draw attention to the social, economic and environmental opportunities of being a part of the Upper and the Lower Lea Valley<sup>60</sup>.

10.11 Regeneration programmes relating to the Lea Valley areas are designed to support and modernise industrial areas in the Lea Valley, develop sites for mixed uses, and improve public transport and attract investment. This is in addition to the housing provision that is required in the corridors under the Sustainable Communities Plan.

10.12 In addition to the direct regeneration benefits for the corridors, the impact of these programmes including Olympic development and Stratford will be, through co-ordination of public policy and private investment, to shift London's centre of gravity to the East. As such there will be benefits to the borough's position within London, as it will be much closer to these new dynamic growth areas than other boroughs.

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<sup>59</sup> GLA 'London Office Policy Review' (2007)

<sup>60</sup> GLA 'Further Alterations to the London Plan' (2006)

## Chapter 11: Demand for Higher Skills

### Skills in the UK over the Next Twenty Years

- 11.1 The 'Leitch Review of Skills'<sup>61</sup> suggested that the nature of employment will change dramatically over the next two decades. Most occupations already require **greater levels of skills** than in the past. Skills that were once seen as specialist and technical, such as in ICT, have increasingly become core requirements for most jobs.
- 11.2 There will be increased demand for more highly skilled occupations, such as managers and professional occupations, whilst lower and some intermediate-skilled occupations will provide a smaller share of employment. In some intermediate jobs, such as skilled trades, demand will be significant over the next 15 years (as older workers retire), even if those jobs account for a decreasing share of employment. By 2014, two-thirds of jobs could be filled by those with at least intermediate level skills. By 2020, more than 40 per cent of jobs could be filled by graduates, up from 30 percent in 2004.

### Significant Jobs Growth in London

- 11.3 GLA Economics project the number of **jobs in the capital to grow** by 912,000 between 2006 and 2026. Employment is expected to grow more rapidly in Inner than Outer London. The GLA estimate over the period 2006 to 2026 employment in business services will increase by 560,000 and a 45,000 jobs growth in financial services. Employment in manufacturing is projected to fall by 124,000 over the next two decades<sup>62</sup>.

### Limited Growth in Jobs in Waltham Forest

- 11.4 In Waltham Forest, the most recent projections produced by the GLA forecast very modest in employment over the next decade, from 67,000 jobs in 2006, to 69,000 jobs in 2016, and 73,000 jobs by 2026<sup>63</sup>. There will be an ample supply of jobs in central London and the City, as well as at Stratford, within easy reach of the borough, and it is for this broader labour market that Waltham Forest residents will need to be prepared.
- 11.5 In common with the rest of London, market forces in Waltham Forest are polarising the labour market and there is a strong likelihood that this will continue. Rates of worklessness tend to be higher amongst lone parents, young people, black or minority ethnic individuals and those with low skills than they are for the working age population as a whole<sup>64</sup>. According to the Treasury report on worklessness in

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<sup>61</sup> HM Treasury 'Prosperity for All in the Global Economy – World Class Skills' (Dec 2006)

<sup>62</sup> GLA 'Employment projections for London – GLA Working Paper 20' (2007)

<sup>63</sup> GLA 'Employment projections for London – GLA Working Paper 20' (2007)

<sup>64</sup> LDA 'What Works With Tackling Worklessness' (2006)

London<sup>65</sup>, this is partly attributable to a number of factors increasing competition for lower level and entry jobs, and the fact that people will travel only short distances to access such jobs.

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<sup>65</sup> HM Treasury 'Forecasts for the UK Economy – A Comparison of Independent Forecasts' (May 2007)

## Chapter 12: Growth of Retail Expenditure

### Rising Retail Expenditure in London

- 12.1 The GLA projects **continuing growth** of retail expenditure – and thus the retail sector of the economy across the capital<sup>66</sup>, notwithstanding the growth of internet shopping. Since 1984, the average annual growth rates have been 3.8 per cent for comparison retail (high street chains and durable goods), and 0.7 per cent for grocery retail. London is planning for continuing population growth, and this will mean that the potential for growth in retail will increase.
- 12.2 In the longer term, the continued growth in spending per capita is forecast on the back of rising employment levels as well as population growth. This is likely to result in significant increases in total household expenditure across London over the next two decades. Spending on non-grocery goods is forecast to rise by 4.8 per cent per annum to 2016 and grocery retail spending by 2.0 per cent per annum.

### Very Large Shopping Centres

- 12.3 There are a small number of very large retail centres across the capital and two new ones are now being built. White City will transform shopping in West London. Stratford City will have a massive impact on East London. Stratford City will include 140,000 square metres of retail space, 465,000 square metres of commercial space, 4,500 homes, hotels, schools, and a range of health and community facilities. Although planning reports and studies on Stratford predict that Stratford will not damage retail expenditure in Waltham Forest, it is possible that this major development could damage future retail growth in Waltham Forest's town centres<sup>67</sup>.
- 12.4 Generally, across the UK, large – often international - retailers are attracting a higher proportion of expenditure leading to the relative decline of small retailers. This process of consolidation has been important to the UK, helping it to increase productivity in the retail sector. Large retailers are able to benefit from economies of scale, increased buying power and the ability to invest heavily in IT and logistics systems.

### Future of Retail in Waltham Forest

- 12.5 In communities like Waltham Forest -- with a large proportion of small independent shops - there may be a decrease in the number of small retailers that occupy the long parades which are a feature of the area. Overall, however, the Waltham Forest 'Retail and Leisure Study'<sup>68</sup> suggests there is potential for considerable development of retail growth across the borough. The study suggests potential demand in the north of the borough for significant convenience floorspace, and indeed there is a current proposal for a large **Tesco** development in Chingford Mount.

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<sup>66</sup> GLA 'Retail in London' (2006)

<sup>67</sup> GLA 'Planning Report on Stratford City' (2004)

<sup>68</sup> LBWF 'LBWF Updated Retail and Leisure Study', (2006)

- 12.6 However, the study says there is more potential for significant expansion of comparison shopping in other parts of the borough. It projects a market for over 8,000 sq m of new shops in Walthamstow up to 2009 and over 28,000 sq m to 2021<sup>69</sup>. Overall growth of retail is likely if the effective policies are promoted.
- 12.7 The increasing diversity within the borough, over the next twenty years, presents a real opportunity to develop the retail, leisure and cultural sectors in the borough. As mentioned previously, BAME communities are set to grow, whilst white ethnic groups are set to decline. Moreover, as social attitudes, social care support and medicine changes allow more people with disabilities to play a fuller role within society, these groups' cultural needs will have to be provided for. Hence, the borough has a real chance to proactively manage the energy and opportunities into niche shops, inclusive cultural/community spaces and accessible leisure facilities.

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<sup>69</sup> LBWF 'LBWF Updated Retail and Leisure Study', (2006)

## Chapter 13: Liveability and the Wider Green Agenda

- 13.1 The liveability and wider green agenda is set to become bigger issue for local government across the UK and Europe. These include a series of issues from the global to the local.

### The Mayor's Carbon Change Action Plan

- 13.2 The London Mayor has identified climate change as a fundamentally important issue, and outlined an ambitious programme. Although not yet statutory, the Mayor's Climate Change Action Plan<sup>70</sup> aims to **cut carbon emissions** by 60% by 2025 from 2000 levels. London was the first city in Britain to set clear CO<sub>2</sub> emission reduction targets of 20% by 2015, and 60% by 2050. On transport, the UK's first congestion charge has halved the number of people using their cars daily, and increased cycling by 72%. The Mayor has also set challenging targets for the use of renewable energy, with its statutory planning guidance calling for 10% of renewables in all new major developments, and plans to double this. The city's new Climate Change Agency has plans to build highly efficient combined heat and power (CHP) projects across the city, and is working on the first zero-carbon eco-suburb. It is clear that Waltham Forest LSP will have to work with the relevant strategic agencies, in the near future, to reduce its and its' carbon footprint.

### Rising Levels of Road Congestion

- 13.3 Transport for London estimate that the growth in jobs and population will result in an additional **2 million trips per day** in the capital between 2001 and 2016<sup>71</sup>. The Department for Transport predicts that car ownership will increase by 30% in London between 1991 and 2031. This could result in a total of over 84,409 cars in Waltham Forest by 2031, an increase of some 11,000 "resident" cars from 84,000 in Waltham Forest today<sup>72</sup>.
- 13.4 Road traffic in the Borough is forecast to grow by a further 28% by year 2020.<sup>73</sup> **Commuting** to work in central London (and out of London) will increase as population increases, but some of this will be accommodated by the capacity improvements planned for the underground system. There is also likely to be continuing growth in travel for shopping to Stratford.
- 13.5 Overall, the London Plan and Transport for London (TfL) are promoting policies, which constrain the use of the motor car particularly for journeys to work and more generally in central London. Substantial investment programmes to improve underground, overground, and bus services are planned offset increasing car use.

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<sup>70</sup> GLA 'Climate Change Action Plan' (2007)

<sup>71</sup> GLA/TfL 'Analysis of the Transport Programme to support the London Plan' (2003)

<sup>72</sup> GLA/TfL 'Analysis of the Transport Programme to support the London Plan' (2003)

<sup>73</sup> LBWF 'Waltham Forest Unitary Development Plan' (2006)

The table below presents capacity movements on underground lines in Waltham Forest planned under the TfL investment programme<sup>74</sup>:

Fig 113: Capacity Increases on the Key London Underground Lines

Line	Journey Time Decrease	Capacity Increase
Central Line	5%	29%
Victoria Line	16%	35%

- 13.6 Additionally, the re-installment of the 'Hall Farm Curve', which would link the Chingford and Walthamstow to Stratford, is planned for 2020<sup>75</sup>. However, this might be too late if the borough wants to develop sustainable transport routes from the centre and north of Waltham Forest into Stratford City.
- 13.7 Nationally, there is increasing interest in road pricing and many believe that a scheme will be introduced within a decade. (Pilot projects are being planned for Manchester, Birmingham and several other sub regions.)
- 13.8 In light of these changes, it is likely that congestion on Waltham Forest's roads will continue to increase in the foreseeable future. Further investments in London's transport network will lead to steady, albeit gradual improvements in services to and from Waltham Forest. Thus, the prospect of road pricing schemes and other policies to limit car use offer considerable challenges – and opportunities – for the Borough.

### A Cleaner, Safer and Greener Waltham Forest

- 13.9 The joint national government publication, 'Living Places: Cleaner, Safer and Greener', drew attention to the value people place on the public realm<sup>76</sup>. Surveys commissioned by central government have consistently demonstrated the local environment is one the top concerns amongst people. As mentioned in the 'Where We Are Now' section, research by the Joseph Rowntree Foundation has reinforced such conclusions.
- 13.10 The Rt. Hon. Hazel Blear's speech, on the introduction of a 'Community Kitty' is further evidence of this shift towards a stronger focus on making the local environment cleaner, safer and greener<sup>77</sup>. Ms Blears announced that local neighbourhoods would possibly receive the power to spend small amounts of money on the local environment and neighbourhood issues.
- The latest round of residents' surveys in Waltham Forest, also, indicates the people's increasing concern with the local environment, liveability and well-being will be a key driver of change. 'Clean Streets' was rated the 3<sup>rd</sup> highest priority for improvement and something that needed improving as well<sup>78</sup>.

<sup>74</sup> TfL '5 Year Investment Programme' (2007)

<sup>75</sup> TfL 'Rail- 2025' (2006)

<sup>76</sup> DCLG 'Living Places: Cleaner, Greener and Safer' (2002)

<sup>77</sup> Rt. Hon. Hazel Blears 'Speech to the LGA Conference' (5<sup>th</sup> July 2007)

<sup>78</sup> LBWF 'BVPI Residents Survey' (2006/7)

## Chapter 14: The 2012 Olympic and Paralympic Games

- 14.1 Waltham Forest is one of London's 5 Olympic boroughs. Significant amounts of public and private money will be invested into the precinct itself, as well as infrastructure improvements in the area. There are consequently enormous expectations from the event, the development work, and the legacy of the games.
- 14.2 Direct investment in Waltham Forest will result in the redevelopment of the Eton Manor area. Additional benefits to the borough from being one of the 5 Olympic Boroughs and accommodating a small part of the Olympic park within Waltham Forest borders have been identified as<sup>79</sup>:
- 300,000 people will visit London for the Olympics
  - 70,000 volunteers will be needed
  - 9,000 jobs in construction will be created
  - £9.2m for jobs brokerage and training into employment programmes
- 14.3 However, expectations also relate to significantly changing the fortunes of some of the poorest boroughs in London in relation to housing provision, employment and skills, culture and leisure, and business growth. Broader impacts of the games in Waltham Forest appear to be already increasing property prices in the neighbouring areas, which include Leytonstone and Leyton. Other areas and sub-regions of London are anticipating benefits from the Olympics to include creative and cultural industries benefiting through increased tourism and through the Cultural Olympiad, in addition to stimulating interest and participation in sports by young people. There will of course be some short-lived negative impacts in terms of congestion.
- 14.4 The "Legacy Plan" for the park is still being prepared and there are several significant decisions regarding the mix of uses and density still to be made.
- 14.5 The 'Olympic Fringe- Scoping Study' for the Leyton-Leytonstone area (northern Olympic Fringe) and the LBWF's 'Olympic Strategy' will look at these issues in more detail. Both will assess the local benefits for Waltham Forest's residents, businesses and voluntary and community sector.

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<sup>79</sup> GoL 'Building on Success- London Challenge for 2012' (2006)

## SECTION D: The “do nothing scenario”

### Introduction

- I Having considered the evidence of where Waltham Forest is now and what the key drivers of change are likely to be over the next 10-20 years, we looked at various scenarios including logically what future we could look forward to for this borough and our community if we were to do nothing differently.
- II What we found was that by 2027 the quality of life has considerably worsened for our residents; and business growth has stagnated. We have had population and household growth and even more diversification amongst our community. But people who live in the centre and the south of the borough are poorer, education and skills levels are low and the local environment is worse than it was 20 years ago.
- III This worsening situation is not because we, the members of the local strategic partnership, including the main public agencies, have performed differently; or that our service standards have declined over the last 20 years. It is because we did nothing to alter the direction of travel. Other drivers of change were allowed to dictate the future and our “do nothing” approach is what has left us with the Waltham Forest described below.

### WALTHAM FOREST IN 2027

- **A Lost Legacy**
- IV The failure to create a **sustainable legacy from the 2012 Olympic & Paralympic Games signalled the decline of our borough**. As with the development of Canary Wharf previously, the range of opportunities for our residents and business were squandered by a lack of strategic direction and leadership. We saw Stratford City as more of a threat rather than an opportunity. The **lack of engagement with major employers** meant that many potential jobs for our residents were lost to the borough. As the wider regeneration of the Lower Lea Valley and the Thames Gateway continues, so we continue to lose out.
  - **A Growing Population Without Wealth**
    - V The increases in population and diversity over last twenty years, have added to the poverty and deprivation in the centre and south of the borough. We have **failed to create and retain wealth**. We have not maximised the opportunity for Waltham Forest of the regeneration of East London. We have failed to lever investment into the borough, the increase in population did not help to generate inward investment into Waltham Forest. As some of our residents have become wealthier we have not convinced them to stay in the borough. Neighbouring town centres, especially Stratford, have become a real drain on our economy as residents increasingly shop there. We offer no alternative here in Waltham Forest.

- **A Shortage of Skills and Rising Unemployment**

VI The **failure to drive up skills among residents** coupled with weak engagement of major employers such as in Stratford City has led to rising unemployment in the borough. Moreover, the **lack of spending opportunities**, such as the absence of an evening economy and a high quality shopping offer, has exacerbated worklessness in the borough. Many of our residents, in particular young people, are frequently unable to compete in the labour market.

- **The strain on public services and community conflict**

VII Rising unemployment and poverty has led to **increasing social needs and tensions in Waltham Forest**. Our public services are under more strain as residents' needs become more complex and severe.

VIII Competition for **public services and housing among our residents is intense**. The failure to address people's needs effectively is fuelling bitterness and rivalry between communities in our borough. Furthermore, our failure to lead and mainstream community cohesion into our policies and actions has worsened relations between different communities. The hardest hit are those with the greatest needs such as people with disabilities and asylum seekers.

IX Public agencies are no longer seen as competent and able to deliver high quality services. Higher and middle income **residents increasingly access services outside the borough, or move out of our borough**. Those families have rapidly left the borough in search of higher achieving schools further reducing educational attainment, especially in the south and centre of the borough. The higher income families who do remain tend to migrate to Chingford where 'gated communities' have become increasingly common. Chingford schools apply a strict geographically-based admission criteria.

- **Housing Market Failure**

X Our failure to create and retain wealth among our residents has led to **mono-tenure communities**. The higher income residents who have gradually moved out of the south and centre, have been replaced by more transient groups. **Family-sized terraced housing has been converted into short stay flats**. Owner-occupation, after the significant rise in the 20<sup>th</sup> century, is now falling in these areas; and house prices are stagnant.

XI Our social housing estates have become increasingly unpopular. They are now filled with people with no other options, and with **highly complex health and social care needs**. Options for comprehensive estate redevelopment have been explored, but developers have not been persuaded of the value of building anything other than private housing, separated from public housing, and that has not been politically acceptable to the Council or Greater London Authority.

XII Other London Boroughs have increasingly taken advantage of the cheaper cost of housing here and bought up considerable numbers of units to house their own residents from their housing registers.

XIII Owner-occupation remains high in Chingford with few opportunities for a greater mix of tenures. Existing residents have successfully resisted attempts at affordable housing schemes.

▪ **Anti-Social Town Centres**

XIV Our town centres lack vibrancy or tranquility. Our failure to generate investment has adversely affected our town centres as liveable spaces. People increasingly shop and find entertainment and leisure opportunities outside of the borough. Our centres appear rundown and unattractive.

XV The rise in youth unemployment and the shortage of activities and facilities for young people has led to a rise in anti-social behaviour. Town centres in the centre and south have become anti-social behaviour hotspots and virtually 'no-go areas' for some sections of the community.

XVI Our inability to prevent the rise of this behaviour has also worsened community cohesion between generations.

▪ **Deteriorating Local Environment**

XVII Rising anti-social behaviour and the lack of investment has **nullified our attempts to improve the local environment**. Our hope of providing more visible neighbourhood policing has been dashed as the borough's police has been diverted towards dealing with serious crime committed by rival youth gangs. The state of our public spaces and streetscapes has **lowered people's sense of place and civic pride** in Waltham Forest and their own particular neighbourhood.

XVIII Those residents who have had a choice, **have opted to leave Waltham Forest**; preferring more vibrant areas with fewer tensions, more activities on offer and better schools. In short our borough has become known as a place of last resort for vulnerable groups requiring high levels of support. Our employment and skills programmes work against us because once residents gain high income employment they generally decide to leave the borough.

▪ **Ineffective Leadership**

XIX Our public services have suffered and there is an increasing level of strain on staff. Higher levels of grant funding have been secured – now surpassing Newham and Tower Hamlets. We are concerned that this is leading to a **dependency culture** both within the community, and by service providers.

- XX It is increasingly difficult to attract people to take on the responsibilities of becoming a Councillor and there is **a rise of extreme views**. This rise in extreme views is in turn persuading members of staff to move on and it is difficult to recruit good calibre replacements.
- XXI If we had been asked 20 years ago to spell out a nightmare scenario for life in Waltham Forest in 2027 this would have been it.

## SECTION E: Our Preferred Scenario for Waltham Forest

### Introduction

- I From looking at the implications of doing nothing as described in the last section and various other scenarios, we took special care in developing a preferred vision for the future testing some of the key assumptions behind our preferred scenario in order to best ensure that it was robust and realisable.
- II We took further confidence from the huge strides made over the last five years (since 2002) in improving services. Moreover, as a strategic partnership, we have very recently conducted a radical review to ensure that we are fit for purpose – the purpose of making Waltham Forest a markedly better place.
- III We can say therefore with some confidence, under our preferred scenario, that by 2027 the quality of life enjoyed by our residents will have improved markedly; and so will the prosperity of our businesses. Driven forward by clear sighted civic leadership we will have fully embraced significant population growth and diversity, provided the required number of good quality homes and support services in an environment of tolerance, cohesion, high liveability, and achievement. Importantly, many of our more prosperous residents will have stayed in Waltham Forest, because schools and health services are good and families feel safe. In short we will have a sustainable community.
- IV The Waltham Forest we can look forward to in 2027 with great anticipation and expectation is described below.

### WALTHAM FOREST IN 2027

- **We are Closer to the Centre of London**
- V The **legacy of the Olympics**, combined with the impact of the **Stratford City** development has brought the borough more into the economic centre of London. Transport infrastructure improvements have made it **easier to commute** into central London, the City and Stratford for work. In the light of these and other changes, the south and centre of the borough have gradually become more **attractive residential locations**. People from a range of socio-economic and cultural backgrounds have moved in. The level of investment and strategic attention focused upon East London since 2007 has created a robust platform for the long term social and economic sustainability of Waltham Forest.

▪ **We have a Growing and Diverse Population**

- VI Waltham Forest's **population continues to grow**. It has become even **more diverse** over the last two decades. Nearly half the population are non white British. Newcomers, from countries such as Lithuania, Poland and Pakistan, settling in the borough mean that far more borough residents have a **stronger faith based** identity.
- VII Schools are educating an **increasing number of multi-lingual children**. A number are from mixed ethnic backgrounds. Some have a strong faith based identity.
- VIII In 2027 **social attitudes towards disabled people are more positive**. Disabled people are more visible in all areas of life including workplaces. Some benefited from the opportunities arising out of the Olympic and Paralympic Games and Stratford City development. As their wealth levels increase and the built environment becomes increasingly accessible they are seeking more opportunities for leisure and entertainment in line with the rest of the population. After 20 years of civil partnerships, **social attitudes towards lesbian women and gay men are more accepting** with same sex couples of all ages and their families being part of mainstream society.
- IX We are well aware that the increase in our diverse population has heightened the tensions between individuals and communities as competition for housing and public services becomes more intense. Levels of cohesion and integration between different groups are not always at the ideal level, but the Council and its partners' policies and actions are helping to constructively manage these tensions. Our decision to mainstream community cohesion into the agenda for each of our services over the past twenty years has helped ensure a more inclusive and cohesive community, which has created a **sense of belonging for an even greater diversity of people**. Promoting cohesion in schools has ensured that school intakes comprise children from a wide socio-economic background. Diversity is an asset to the school community.
- **We have much less inequality and deprivation**
- X By 2027 our policies for tackling deprivation and encouraging mixed income communities have **closed the gap between the poorer neighbourhoods and the rest**. Inequalities have been reduced by the introduction of more accessible forms of home ownership complemented by health, education, skills and employment programmes.
- XI We recognise that **social exclusion still exists** with educational attainment, life expectancy and crime levels still reflecting some polarisation between the north and the south. But we have made considerable inroads.

▪ **We can boast distinctive places alongside common values**

XII The south of our borough has become a popular 'next-stage' for young professional couples living in Stratford wishing to settle down and start a family. The family-friendly housing offer in Leyton and Leytonstone has complemented the range of smaller sized apartment living available in Stratford City. Walthamstow has become a vibrant cosmopolitan centre of north east London. It has regained its reputation for a high quality street market and now boasts a new image for **specialist shops and a well developed cultural and leisure offer**. Chingford remains an attractive outer London suburb with excellent access to high quality open spaces including Epping Forest. It now has improved transport links into Stratford as well as the good transport access it always enjoyed to the City of London.

XIII The borough's different places are seen as a clear strength of Waltham Forest. And although **each area is clearly distinctive** with its own character and sense of place, there are **increasingly common values and attitudes** that unite the majority of residents across the borough. The fact that the borough increasingly boasts a mix of incomes across all neighbourhoods with higher and middle income earners increasingly choosing to settle in the south and centre of Waltham Forest, has greatly assisted this uniform sense of belonging.

▪ **We are a beacon of Environmental Sustainability**

XIV In 2027 our borough has become an exemplar for environmental sustainability in London. In moving towards a low-carbon economy and society, we have become a **low waste, water and energy borough**. Recycling levels have now reached over 70% for all waste, making the borough an exemplar for the rest of England. There has been a **step-change in house-building practices**: all new housing is low-carbon, placed near a range of social and community infrastructure and with accessible walking and cycling routes to ensure sustainable access to our major transport nodes. The energy efficiency of our older housing stock has, also, been substantially enhanced.

XV The **implementation of sustainable business practices**, including the use of energy efficiency improvements and other practical 'green' measures, has transformed our businesses into green enterprises. Our planning service has also proactively worked with developers to ensure that new commercial and light industrial buildings are built to high energy efficiency standards with natural ventilation systems.

XVI Sustainability has been **mainstreamed throughout all our policies**, ensuring that our council services make a positive contribution to climate change and sustainable development. Our staff, in the council, have been actively engaged via green travel planning: a significant majority of our workers living in the borough now avoid getting in their cars and use a combination of walking, cycling or public transport. Our public sector buildings have becoming best practice examples in sustainable building, providing visible signal to developers wishing to build in our borough. Our schools

have led the way, our Building Schools for the Future funding was used to transform **our schools into low carbon buildings**, which have also helped educate our children and young people about the importance of tackling climate change.

- **Our supply of housing has exceeded targets set by the London Mayor**

XVII Our planning policies **have led to a greater supply of high quality housing for a range of tenures** in mixed communities across the borough. Although housing has been built to higher densities than in previous decades, it has been taken forward in conformity with the borough's exemplary **urban design framework**. New homes and house conversions are not only designed to the highest quality but they are made to blend attractively with the wider surroundings.

XVIII Effective strategic planning and joint working between our different agencies has helped to ensure that by 2027 the social infrastructure to support the housing - schools, health centres, open spaces, public transport, places of worship and policing – are good quality, efficient and at the right level.

XIX The number of households on the 'Local Authority Social Housing Register' has reduced and we have helped more middle income earners to access home ownership. But we acknowledge that **excess demand for all forms of housing remains** in our borough as it does across London. We recognise also that significant numbers of lower-income residents are still unable to access home ownership in the borough and the lack of available and affordable housing has led to some people moving to the South-East of England including to the new residential developments along the Thames Gateway. But we have made significant progress on affordable housing for local people even if this is "work in hand".

- **We can say with confidence that we now have a cleaner, safer and greener borough**

XX With the introduction of higher environmental service standards, visible neighbourhood policing and robust urban design guidance, the **borough has become a cleaner, safer and greener place**. Amidst concern over environmental degradation, low levels of civic pride and population churn, particularly in the south of the borough, caused by short-stay residents in poorly converted flats, we have proactively set out to improve the local environment and to advocate a strong sense of citizenship. This has had a beneficial impact particularly in neighbourhoods in the south of the borough: attracting a more settled community from a variety of socio-economic backgrounds. Although the south still has some short-stay residents,

increasingly our flats are bought by less transient people. As population churn has been reduced, civic pride and sense of place has been enhanced.

- XXI Our more visible neighbourhood policing has also created **a welcoming place for newcomers**. Women and people from minority groups **feel safe** from hate crime. Along with other measures designed to promote cohesion and integration within the borough, neighbourhood policing has helped to create a relatively low tension urban environment.
- **All our children have access to a better education and have more routes into work**
- XXII The turnaround for schools began when migrants in the south of the borough settled in the area. The high quality pre-school provision in Children's Centres was partly responsible for this trend; as was also our building schools for the future programme, which has transformed learning and left a legacy of innovative learning spaces, rich in technologies. The school intake is still very diverse and often multi-lingual and children increasingly come from a wide socio-economic background. **Our extended schools are now established as a hub for community learning, engagement, youth activities and community cohesion.**
- XXIII In 2027 Waltham Forest has a set of thriving secondary schools and colleges working in partnership together to deliver an integrated offer for people aged 14-19.. **Close collaborative working** has weakened the notion of popular schools, since they all offer the widest curriculum choice in all 3 areas. Young people aged 14-19 (Key Stages 4 and 5) have the flexibility to progress through aptitude as well as age.
- XXIV Strong links were made with the **Stratford City and Olympic employers** leading up to the 2012 Games, enabling high levels of recruitment from borough residents. While many of these jobs were relatively low skilled, they provided the first step on the ladder for many young people. They have since opened up a wide range of employment opportunities for local people in the City and Central London job markets, in Canary Wharf and at Stratford. Local jobs in business services, light industrial and manufacturing on the industrial estates in Waltham Forest complement the range of sub-regional jobs found outside the borough.
- XXV While it was expected that London, as a whole, would suffer a slight increase in unemployment levels in the 2010s, Waltham Forest experienced a gradual but consistent **decline in unemployment and benefit dependency**, bringing the levels below the average rate for London. Our partner agencies have worked successfully together to ensure that Waltham Forest in 2027 shows that we do not have any young people who are not in education, employment or training (NEETS).
- XXVI Not that we are quite at the finishing line just yet. Some young people in the centre and south of the borough have closed the gap in educational attainment but performance is still higher in the north. Likewise our programmes have helped

significant numbers of people into long-term sustainable employment, but we do recognise that they are not always able to progress to middle and higher income occupations. Raising income levels for our residents through even higher educational attainment and skills levels remains a priority.

- **We can now claim to be an entertainment and speciality shopping destination**

XXVII Our growing population and the higher employment and earnings levels of our residents has created the opportunities for more retail, leisure and cultural development in the borough. The altogether more attractive urban environment and our own proactive relationships with the private sector have helped **to lever higher levels of inward investment into Waltham Forest.**

XXVIII Those rising levels of inward investment have in turn **increased the quality of our town centres.** In 2027 we have a growing **family-orientated evening economy**, encouraged by increasing local disposable income and our enabling planning and licensing policies. Walthamstow, in particular, has become a destination for shoppers looking for a more international range of shops and market stalls. We have welcomed the investment in leisure and culture towards a more diverse audience. Our town centres, and Walthamstow especially, now have a more **cosmopolitan and metropolitan** feel.

XXIX The investment has not stopped there. The increased attractiveness of Walthamstow town centre has spurred **new office space developments for small firms** – so we do have a daytime economy too. Many of these small businesses work in international sectors, business and financial services, and the creative sector. We applaud the foresight of the Council in assembling land in the town centre, working with other landowners and developers and having had the courage and wisdom to build speculative office space located close to Walthamstow Central Station.

XXX The borough's town centres are still not as popular or economically vibrant as some others. Walthamstow has developed a niche shopping offer but residents continue to travel to major shopping centres in and out of London, such as Stratford City. Young middle and higher income professionals still prefer the more fashionable night time locations, such as Upper Street in Angel and Hoxton Square in Shoreditch, to the quieter and family orientated locations in the borough. But we believe that we have found our niche and our town centres are considerably more vibrant and sustainable than was the case 20 years ago.

- **We have been acknowledged as a beacon of local leadership**

XXXI Waltham Forest had a reputation for delivering decent services. Now the authorities are seen as being **outward looking, innovative and proactive.** The Council has

displayed model leadership. Public service agencies are seen to be working with the Council in a collaborative way to improve quality of life. Our LSP is acknowledged as open and accountable. The business community and the voluntary and community sector have been and are still fully involved in helping to shape a better Waltham Forest. Our relationships with regional and central government are strong. In fact in 2027 they frequently cite Waltham Forest for its innovative and effective approaches to service delivery, leadership and shaping its neighbourhoods. From being that part of London that few people had heard of 20 years ago, most people now know what Waltham Forest has to offer. Many admire and indeed envy what it has achieved and more importantly its bright future.