

Heathrow Community Engagement Board

Area Profile

Final Report

October 2019



HEATHROW COMMUNITY
ENGAGEMENT BOARD



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Heathrow Impact Study Area

Key Findings

1. **Employment in the HISA has grown at a slower rate** than England as a whole, while business growth has occurred at a faster rate.
2. **The HISA is an area of high productivity**, which has been growing above the national average in recent years.
3. The **transport sector and business support services sector are highly specialised** in the HISA.
4. The HISA has a **larger young and working age population** compared to England, though growth in these cohorts is slowing.
5. The HISA **population is very diverse**, with a 43% BAME population and a strong Asian immigrant presence.
6. Overall, **the population is highly qualified**, but there remain pockets of education deprivation.
7. There is **wide variability in housing affordability** across the study area.
8. There are **higher rates of air pollution and related mortality in the HISA** LAs compared to England.
9. The HISA is **well serviced by the Strategic Road Network**, with access to the M4 east-west link and the M25 orbital
10. There is a **large variance in public transport connectivity** between HISA's London Boroughs and the suburban authorities.
11. **The area performs well in terms of digital connectivity**, albeit with some pockets that are currently underserved – particularly to the west.

Key Statistics

Business and Employment

Employment



654,000

Employment Growth



7%
(2012-17)

GVA



£86,706

GVA Growth



19%
(2012-17)

People, Place and Well-being

Population



1,236,080

Population Growth



3%
(2013-18)

Unemployment



5%

Neighbourhoods
in the most
deprived 20%



9%

Travel, Transport & Digital Infrastructure

Residents who live
and work in HISA



55%

% of Adults
who Walk or Cycle



70%

Fibre to the
Premises



9%

4G Indoor
Coverage

4G

87%

Looking Forward

The purpose of this work is to provide an objective review of the current socio-economic conditions prevalent across the Heathrow Impact Study Area (HISA). That said, it's important to reflect on the questions that these findings raise for future engagement and investment activities that the HISA may undertake. Several of these questions are captured in the box below, which may provide a starting point for future engagement and strategy development.

Possible Questions for Future Engagement & Activity

- How should the economic and demographic characteristics of the HISA influence how investment and compensation is targeted?
- How can the HCEB ensure its engagement process effectively targets areas that are trailing others in socio-economic terms?
- By some measures there is a large disparity of social and economic opportunity across the HISA, how can funding be prioritised to communities and individuals most in need?
- There are some areas trailing in digital infrastructure terms and with large sections of the population likely to be unable to access the internet. How can any engagement strategy maximise the benefits of digitisation but also ensure all can participate?
- What actions can be taken to ensure benefits are maximised equally amongst all aspects of society?
- Through a better understanding of the local economy and business profile, how can the HCEB and its partners work to support businesses in capitalising on the benefits of expansion?
- What activity will deliver the greatest benefit to local residents and businesses and what role can the HCEB play in enabling this?
- How can the HCEB and its partners provide residents with routes into the new employment opportunities that may come forward from expansion?



Chapter 1

Introduction

Study Purpose

HCEB and Context for this Work

The Heathrow Community Engagement Board (HCEB) is an independent body set up to increase community and stakeholder participation in Heathrow's planning and decision-making processes. They also work with local people to provide challenge and scrutiny of the airport's day to day operations and expansion proposals.

Hatch Regeneris have been commissioned by the HCEB to undertake an objective area profile to better understand the socio-economic composition of the local authorities surrounding Heathrow Airport.

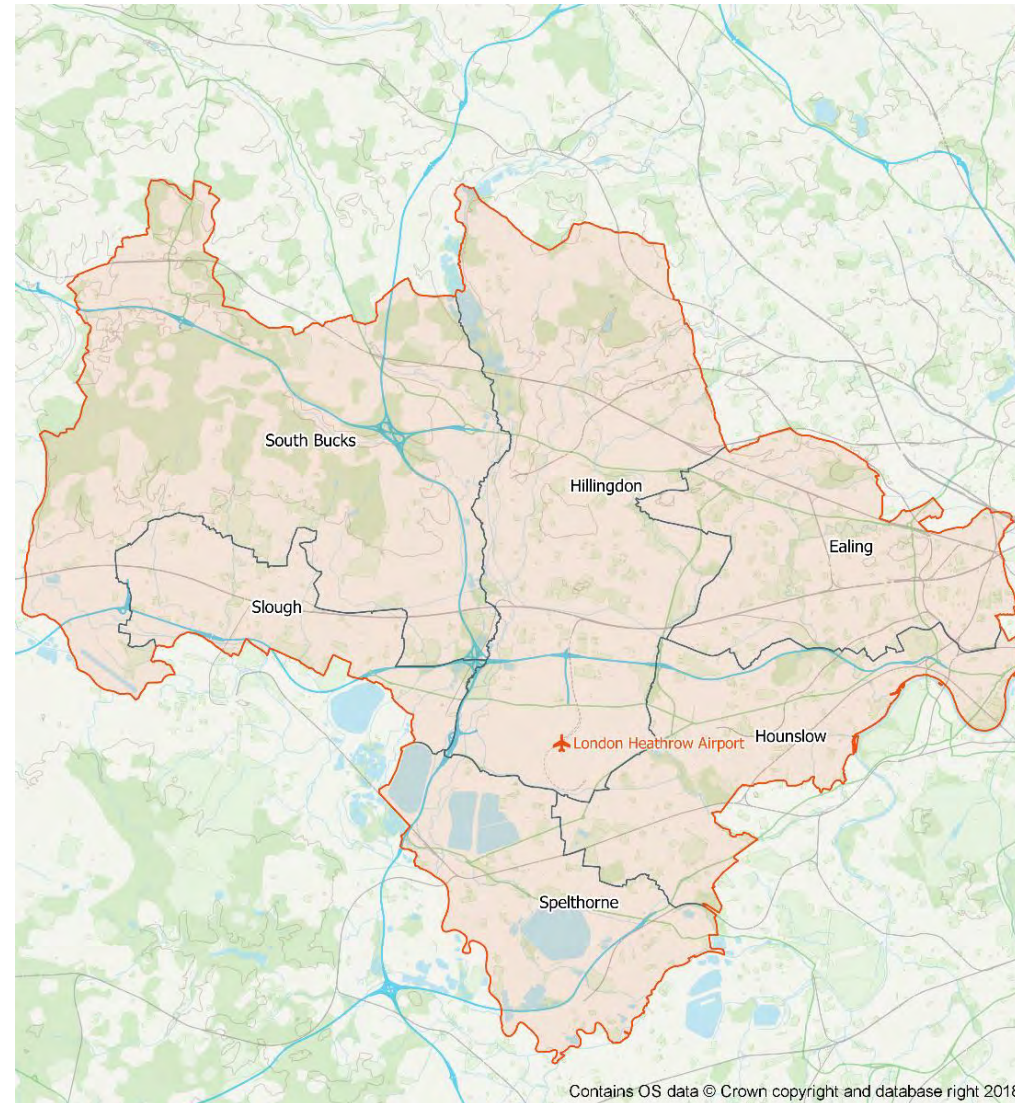
As such, the study's geographical focus is on:

- + London Borough of Ealing (LB Ealing)
- + London Borough of Hillingdon (LB Hillingdon)
- + London Borough of Hounslow (LB Hounslow)
- + Slough
- + South Bucks
- + Spelthorne

This area is referred to throughout the study as the **Heathrow Impact Study Area (HISA)**. In order to contextualise the performance of the HISA and its constituent areas, data for the area has been provided alongside the national performance for context.

The key aim of this Area Profile is to provide the HISA with a detailed and robust body of evidence of the current socio-economic conditions locally to help inform future decision making (including compensation funding) and discussions with local communities and local authorities.

Study Area



Study Considerations

HCEB Strategic Goals 2019

Further rationale for this study stems from the HCEB Strategic Goals, which sets out the organisation’s key objectives for the year. Notably, these focus on enhancing the depth and diversity of the responses from the consultation process and improving transparency and communication around the impact of the airport on the local area. The socio-economic baselining provided in this work will aid HCEB in better understanding its local population and provide evidence that will help them to achieve their strategic goals.

Vision for Sustainable Communities

Working alongside HCEB, Temple are currently in the process of developing a vision for sustainable communities at Heathrow. The focus for this work is to develop and clarify a vision for a new ecosystem of sustainable communities in and around Heathrow Airport for the next 30 years.

Once formulated, this vision will guide the establishment of a framework for sustainable communities, which will individually and collectively provide for an exciting, enticing, healthy, prosperous and fulfilling future for all residents, visitors, investors, and the wider community including local businesses, schools, service providers etc. now and in the future.

The vision and framework will capture, evidence and communicate what the opportunities and priorities are (and should be) to enable existing and future residents, communities and businesses to flourish, thrive and benefit from living alongside the UK’s biggest airport.

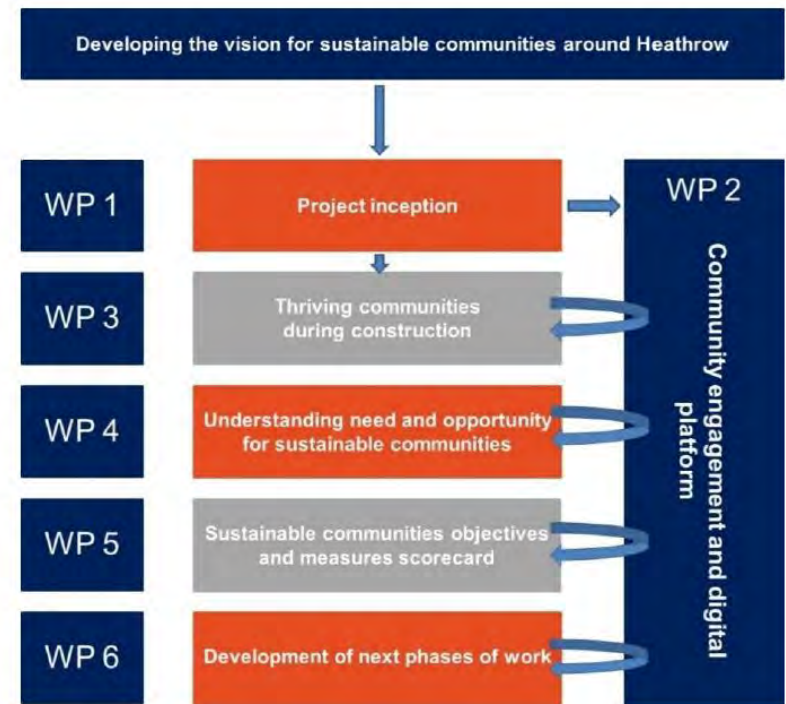
The purpose of this evidence base is to feed directly into this vision making process – providing a robust body of socio-economic intelligence to build an evidence led engagement strategy, vision and framework.

The initial vision scoping proposes six key **work packages** (WPs) as part of delivering the overall vision and framework for sustainable communities around Heathrow each of which will be underpinned by community engagement and a digital consultation platform.

HCEB Strategic Goals

1. Maximise the depth and diversity of responses to Heathrow Airport’s expansion consultation.
2. Procure and publish information about Heathrow Airport’s current operations and promote open and effective communication about the impact on local communities, stakeholders and users of the airport.
3. To improve the quality of support and overall experience of local residents

HCEB Vision - Work Packages



1. Introduction

Study Approach

This evidence base collates a broad range of intelligence on the socio-economic performance of the HISA's economy, society and infrastructure. It draws on a range of both publicly and privately accessible socio-economic datasets and sources, including:

- + ONS Annual Population Survey
- + ONS Mid year Population Estimates
- + ONS Business Register and Employment Survey (BRES)
- + ONS UK Business Count
- + OfCom
- + Public Health England
- + Homes England

In order to synthesise the findings from this large amount of data, the evidence has been structured into three key themes:

- + **Business and Employment** – draws in evidence on the current scale and performance of the economy in employment and business terms as well as offering insights into sectoral performance.
- + **People, Place and Well-being** – provides intelligence on the current demographic composition of the HISA and the relative well-being of residents.
- + **Transport and Connectivity** – considers the current issues related to both digital and transport infrastructure across the HISA

Each of these thematic sections are concluded with a **key findings page**, which draws out the main findings from each section and the key issues that will possibly require future consideration.

The work concludes by providing individual **Local Authority Overviews** which bring together key statistics for each HISA local authority and outlines key issues that have emerged from the evidence.



Chapter 2

Business and Employment

Business and Employment

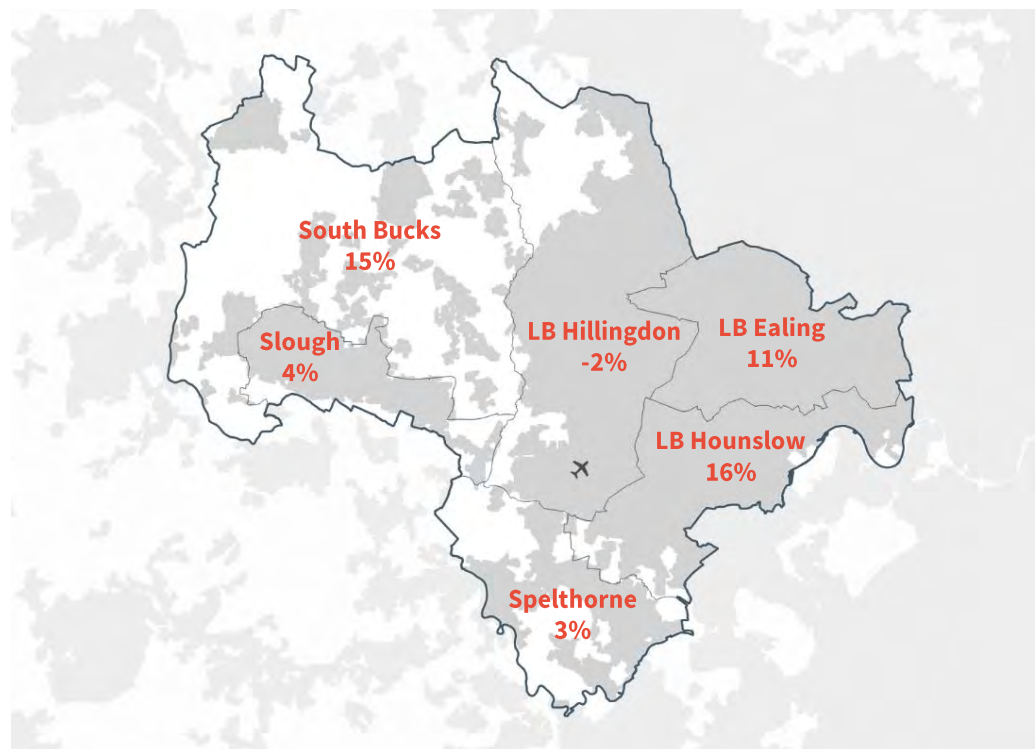
The HISA currently employs a total of 654,000 people. This marks a **7% increase in employment since 2012, which is broadly in line with the growth rate nationally.** In comparison, Hounslow, South Bucks and LB Ealing’s employment have respectively increased by 16%, 15% and 11%, while LB Hillingdon’s employment has decreased by 2% since 2012.

Despite this decrease, LB Hillingdon accounts for the highest number of people employed in the HISA, followed by LB Hounslow and LB Ealing.

Over the past five years, **the number of businesses in the HISA has grown at a faster rate (27%) than at the national level (21%).** There are currently 67,600 business in the HISA, with LB Ealing, LB Hillingdon and LB Hounslow accounting for the larger shares of businesses in the area.

It is worth noting that Slough and Spelthorne have relatively low employment and business growth rates compared to the national average.

Employment Growth (2012-2017)



	No. of jobs, 2017	Employment change (2012-17)	No. of businesses, 2018	Business change (2013-2018)
HISA	654,000	7%	67,600	27%
<i>Ealing</i>	<i>138,000</i>	<i>11%</i>	<i>19,490</i>	<i>33%</i>
<i>Hillingdon</i>	<i>192,000</i>	<i>-2%</i>	<i>15,320</i>	<i>31%</i>
<i>Hounslow</i>	<i>164,000</i>	<i>16%</i>	<i>14,780</i>	<i>25%</i>
<i>Slough</i>	<i>83,000</i>	<i>4%</i>	<i>7,090</i>	<i>37%</i>
<i>South Bucks</i>	<i>40,000</i>	<i>15%</i>	<i>5,660</i>	<i>13%</i>
<i>Spelthorne</i>	<i>37,000</i>	<i>3%</i>	<i>5,260</i>	<i>11%</i>
England	26,418,250	9%	2,669,690	21%

Source: BRES, 2017,2012, UK Business Count, 2018, 2013

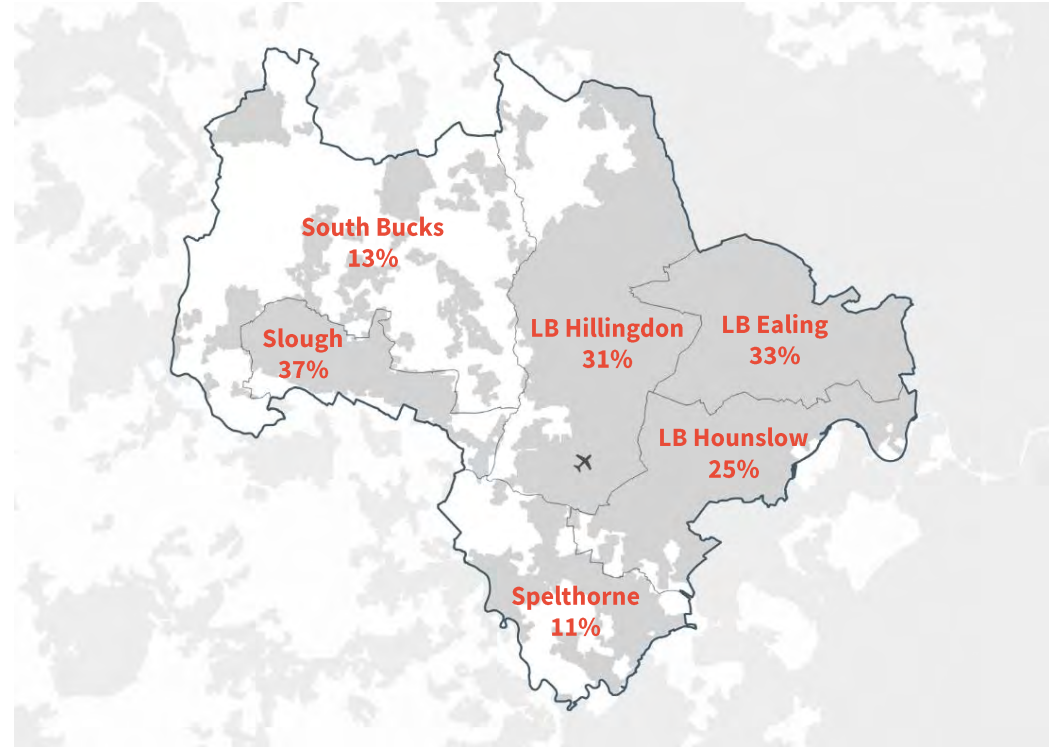
Business Size

In the HISA, **most businesses tend to be micro businesses** (0-4 employees), with 87% of the area's businesses being micro compared to 85% across England.

The proportion of small businesses (5-9 employees) in the HISA stands at 10%, which is slightly lower than the national average (12%).

There are a further 1,715 medium businesses (10-49 employees) and 285 large businesses (50-249 employees) in the HISA, which together accounts for 3.4% of all businesses. This figure aligns with the share of medium and large businesses in the national economy.

Business Growth (2013-2018)



	Micro businesses		Small Businesses		Medium businesses		Large businesses	
	No.	%	No.	%	No.	%	No.	%
HISA	59,075	87%	6,520	10%	1,715	3%	285	0.4%
<i>Ealing</i>	17,450	90%	1,625	8%	370	2%	45	0.2%
<i>Hillingdon</i>	13,035	85%	1,675	11%	505	3%	105	0.7%
<i>Hounslow</i>	12,940	88%	1,390	9%	370	3%	75	0.5%
<i>Slough</i>	6,015	85%	795	11%	240	3%	40	0.6%
<i>South Bucks</i>	5,035	89%	515	9%	100	2%	10	0.2%
<i>Spelthorne</i>	4,600	87%	520	10%	130	2%	10	0.2%
England	85%		12%		3%		0.4%	

Source: UK Business Count, 2018, 2013

Productivity

Gross Value Added (GVA) measures the contribution to a wider economy of an individual producer, industry or sector. In other words, GVA is the value of the amount of goods and services that have been produced, less the cost of all inputs and raw materials that are directly attributable to that production.

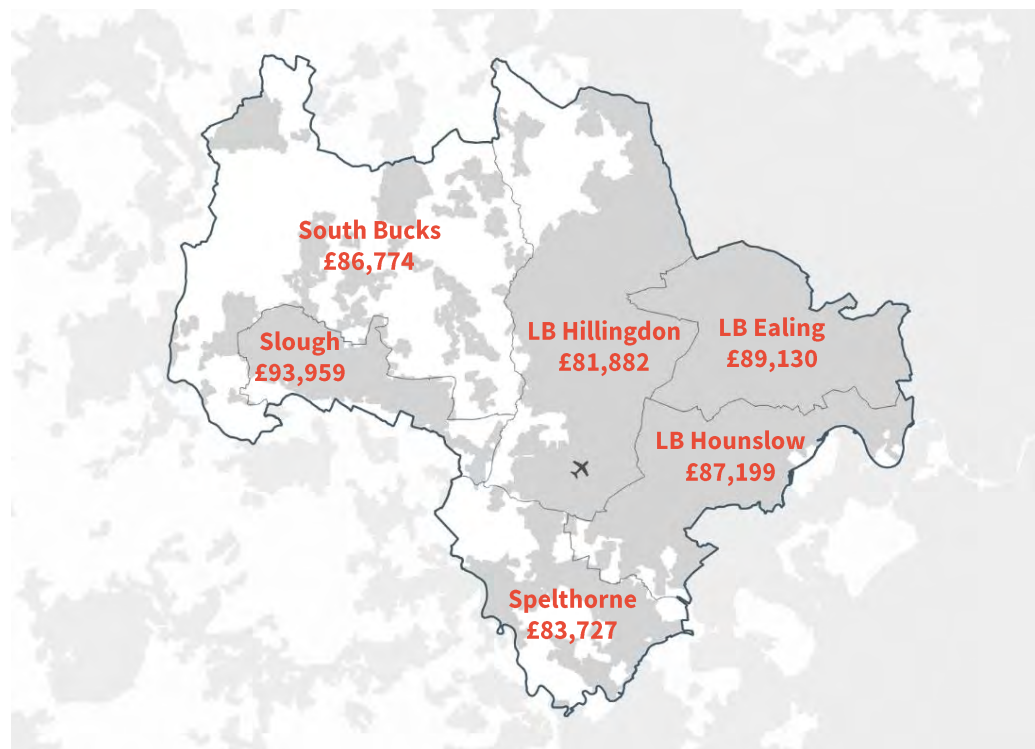
The HISA currently generates **£48.3bn of GVA to the UK economy**, with LB Hillingdon, LB Hounslow and LB Ealing accounting for the highest GVA outputs.

In terms of **GVA per FTE (full-time equivalent employee)**, the HISA also performs more positively than at the national level, with the HISA producing £86,706 of GVA per FTE compared to £70,018 in England. This means that the HISA is 1.2 times more productive than nationally.

Within the HISA, Slough, LB Ealing, LB Hounslow and South Bucks exhibit strong GVA per FTE figures. On the other hand, the GVA per FTE in LB Hillingdon and Spelthorne's is slightly lower than the HISA average.

Over the past five years, **productivity has grown strongly in the HISA (+19%) where the growth rate is almost twice that seen nationally (+10%)**. Growth has been especially pronounced in LB Hillingdon, where the growth rate has almost been around three times that seen nationally (+28%). While most local authorities in the HISA show positive GVA change, Spelthorne (+5%) is performing below the national average.

GVA per FTE (2016)



	GVA – Total (millions)	GVA per FTE	GVA Change (%) – Past Five Years
HISA	£48,382	£ 86,706	19%
<i>Ealing</i>	<i>£13,183</i>	<i>£ 89,130</i>	<i>16%</i>
<i>Hillingdon</i>	<i>£12,949</i>	<i>£ 81,882</i>	<i>28%</i>
<i>Hounslow</i>	<i>£9,938</i>	<i>£ 87,199</i>	<i>22%</i>
<i>Slough</i>	<i>£6,859</i>	<i>£ 93,959</i>	<i>11%</i>
<i>South Bucks</i>	<i>£2,763</i>	<i>£ 86,774</i>	<i>14%</i>
<i>Spelthorne</i>	<i>£2,690</i>	<i>£ 83,727</i>	<i>5%</i>
England	£1,498,232	£70,018	10%

Enterprise

According to ONS Business Demography data, in 2017 there were:

- 9,670 new enterprises registered (start ups) in the HISA.
- 5,980 enterprises deregistered (deaths) in the HISA.
- This resulted **in a net increase of 3,690 enterprises** across the year.

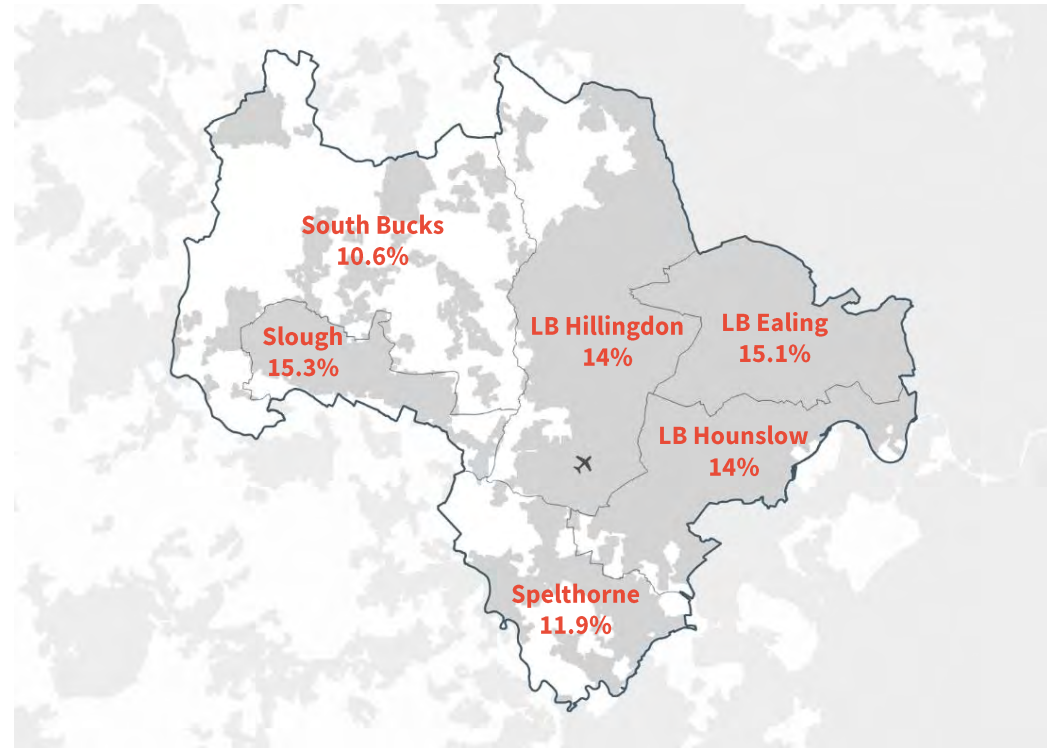
Start-up business rate (the number of business births per 1000 active businesses) provides a measure of entrepreneurial performance. Data for 2017 indicates that in the HISA, there were **140 new active enterprises in 2017 for every 1,000 active businesses, which is slightly higher than the national figure (132).**

When examining business start-up rates in 2017, Slough and LB Ealing had the highest start-up rates across the rest of the HISA, while South Bucks and Spelthorne had below-average business start up rates.

Data on the survival rates of new businesses created across different areas is helpful in understanding the business environment in which businesses currently exist in, and how easily they are able to establish themselves within the local area. Data on the survival rates of new active businesses in the HISA shows that of businesses who were established in 2017, around **43% of businesses survive after five years of trading - in line with the national position.** It is worth noting that despite a low business start up rate, South Bucks has the highest five-year survival rate of all local authorities in the HISA (47%).

Data on sole traders provides information on individuals who run their own business and are self-employed. **The HISA has a relatively low proportion of sole traders (10.5%), compared to England (15.7%).** South Bucks in particular has a low percentage of sole traders.

Business Start Up Rate (per 1,000 active businesses) (2017)



	Business Birth Rate	Business Survival Rate (5 years)	% of sole traders	Business Deregistration (Death) Rate
HISA	14%	43%	10.5%	9%
Ealing	15%	42%	10.6%	9%
Hillingdon	14%	44%	10.2%	9%
Hounslow	14%	43%	10.5%	8%
Slough	15%	42%	12.8%	8%
South Bucks	11%	47%	7.2%	10%
Spelthorne	12%	37%	13.0%	8%
England	13%	43%	15.7%	8%

Source: ONS Business Demography, 2017

Core Employment Sectors

The HISA's four largest employment sectors are in:

- Public Administration, Education, Health (122,980 employees or 19% of all people in employment)
- Transport (77,745 employees or 12% of all people in employment)
- Business Support Services (74,070 employees or 11% of all people in employment)
- Retail (62,400 employees or 10% of all employment).

The **public administration, education and health sector is the largest employment sector across all of the local authorities** within the HISA, except for Hounslow where most people work in the transport sector.

Largest Sectors (2017)



Total (Proportion of Total)	Largest Sector	2 nd Largest Sector	3 rd Largest Sector	4 th Largest Sector
HISA	Public Administration, Education, Health 122,980 (19%)	Transport 77,745 (12%)	Business Support Services 74,070 (11%)	Retail 62,400 (10%)
<i>Ealing</i>	<i>Public Administration 29,500 (21%)</i>	<i>Retail 15,840 (11%)</i>	<i>Business Support Services 13,790 (10%)</i>	<i>Hospitality, Leisure and Recreation 13,780 (16%)</i>
<i>Hillingdon</i>	<i>Public Admin, Education, Health 39,290 (20%)</i>	<i>Transport 28,525 (15%)</i>	<i>Business Support Services 27,500 (14%)</i>	<i>Financial and Professional Services 19,555 (10%)</i>
<i>Hounslow</i>	<i>Transport 35,220 (15%)</i>	<i>Public Admin, Education, Health 25,705 (16%)</i>	<i>ICT & Digital 18,970 (12%)</i>	<i>Financial and Professional Services 15,705 (10%)</i>
<i>Slough</i>	<i>Public Admin, Education, Health 15,005 (18%)</i>	<i>Business Support Services 10,560 (13%)</i>	<i>Retail 8,295 (10%)</i>	<i>ICT & Digital 8,130 (10%)</i>
<i>South Bucks</i>	<i>Public Admin, Education, Health 7,015 (18%)</i>	<i>Financial and Professional Services 4,945 (13%)</i>	<i>Hospitality 4,575 (12%)</i>	<i>Retail 4,200 (11%)</i>
<i>Spelthorne</i>	<i>Public Admin, Education, Health 6,465 (17%)</i>	<i>Retail 4,395 (12%)</i>	<i>Hospitality, Leisure and Recreation 3,825 (10%)</i>	<i>Construction 3,460 (9%)</i>
England	Public Admin, Education, Health 25%	Financial and Professional Services 13%	Retail 11%	Hospitality, Leisure and Recreation 10%

Core Business Sectors

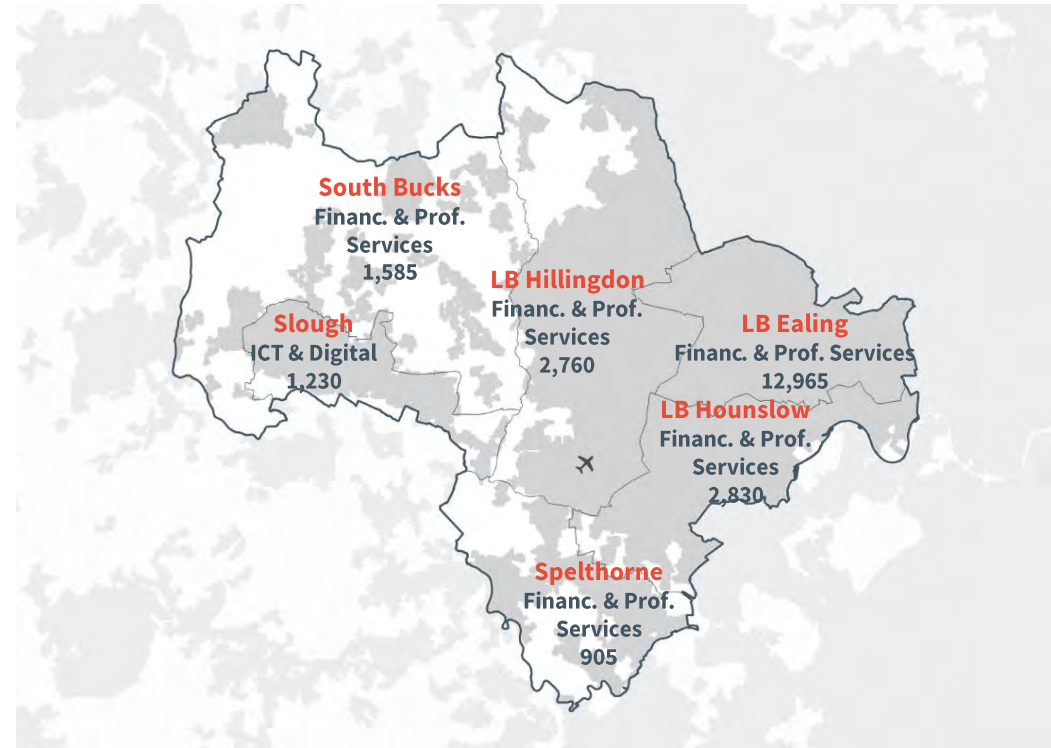
The HISA's four main business sectors are in:

- Financial and Professional Services (12,965 businesses or 19% of all businesses)
- ICT & Digital (8,170 businesses or 12% of all businesses)
- Construction (7,790 businesses or 12% of all businesses)
- Retail (7,460 businesses or 11% of all businesses).

The **financial and professional services sector is the largest business sector across all of the local authorities within the HISA**, except for Slough where most businesses are in the ICT & Digital sector.

The construction sector is also an important sector in most of the local authorities, and is the second largest business sector in LB Ealing, LB Hillingdon, South Bucks and Spelthorne.

Largest Sectors (%) (2018)



Total (Proportion of Total)	Largest Sector	2 nd Largest Sector	3 rd Largest Sector	4 th Largest Sector
HISA	Financial & Professional Services 12,965 (19%)	ICT & Digital 8,170 (12%)	Construction 7,790 (12%)	Retail 7,460 (11%)
<i>Ealing</i>	<i>Financial & Professional Services 3,740 (19%)</i>	<i>Construction 2,450 (13%)</i>	<i>Retail 2,300 (12%)</i>	<i>ICT & Digital 1,920 (10%)</i>
<i>Hillingdon</i>	<i>Financial & Professional Services 2,760 (18%)</i>	<i>Construction 2,050 (13%)</i>	<i>Retail 1,755 (12%)</i>	<i>ICT & Digital 1,670 (11%)</i>
<i>Hounslow</i>	<i>Financial & Professional Services 2,830 (19%)</i>	<i>ICT & Digital 2,280 (16%)</i>	<i>Retail 1,520 (10%)</i>	<i>Construction 1,390 (9%)</i>
<i>Slough</i>	<i>ICT & Digital 1,230 (18%)</i>	<i>Financial & Professional Services 1,145 (16%)</i>	<i>Retail 835 (12%)</i>	<i>Construction 600 (9%)</i>
<i>South Bucks</i>	<i>Financial & Professional Services 1,585 (29%)</i>	<i>Construction 585 (11%)</i>	<i>Retail 480 (9%)</i>	<i>ICT & Digital 470 (8%)</i>
<i>Spelthorne</i>	<i>Financial & Professional Services 905 (18%)</i>	<i>Construction 715 (14%)</i>	<i>ICT & Digital 600 (12%)</i>	<i>Retail 5700 (11%)</i>
England	Financial & Professional Services 20%	Retail 12%	Construction 11%	Hospitality 9%

High Growth Employment Sectors

Employment growth in the HISA tends to be concentrated around the utilities and waste sector, which has grown by 79% over the past five years. However, it is important to note that in many instances that this growth has come from a relatively small base. In absolute terms **business support services has seen a large amount of growth accommodating 11,580 more jobs over the past five years.** The construction sector has also experienced a large degree of growth.

It's important to note that the **transport sector has experienced monumental levels of growth in Hounslow** – where there have been an additional 24,730 jobs over the past five years. That said, it is likely that some of these jobs have been redistributed from other parts of the HISA, given that the sector does not appear as one the area's largest growth sectors.

Largest Growing Sectors (%) (2012-2017)



Percentage growth (+ absolute growth)	Largest Growing Sector	2 nd Largest Growing Sector	3 rd Largest Growing Sector	4 th Largest Growing Sector
HISA	Utilities & Waste 79% (+2,350)	Other Services 25% (+2,750)	Business Support Services 19% (+11,580)	Construction 18% (+4,530)
Ealing	Utilities & Waste 70% (+190)	Business Support Services 50% (+4,610)	Construction 43% (+ 2,490)	Transport 36% (+1,890)
Hillingdon	Creative 57% (+665)	Utilities & Waste 43% (+300)	ICT & Digital 37%	Public Admin, Education, Health 29% (+8,720)
Hounslow	Transport 236% (+24,730)	Utilities & Waste 46% (+165)	Financial and Professional Services 20% (+2,610)	Other Services 19% (+330)
Slough	Utilities & Waste 93% (+1,095)	Creative 80% (+570)	Business Support Services 39% (+2,990)	Other Services 36% (+530)
South Bucks	Utilities & Waste 181% (+190)	Business Support Services 50% (1,210)	Creative 38% (+815)	ICT & Digital 37% (+300)
Spelthorne	Warehouse & Logistics 166% (+720)	Utilities & Waste 115% (+410)	Other Services 45% (+290)	Creative 21% (+180)
England	Other Services 28%	ICT & Digital 27%	Business Support Services 24%	Warehousing & Logistics 24%

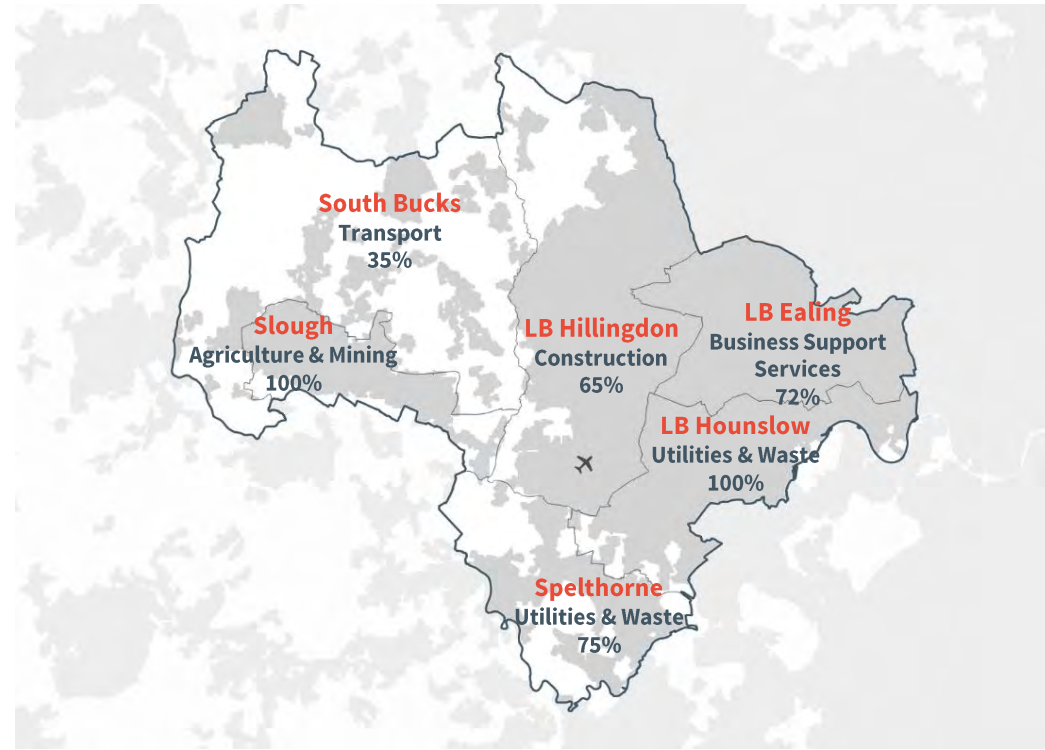
High Growth Business Sectors

The **largest business growth sector across the HISA is the construction sector**, which has grown by 57% over the past five years – equivalent to 2,840 jobs.

Data on each local authority shows that the fastest growing sector since 2012:

- In Ealing was the business support services sector (+72%)
- In Hillingdon was the construction sector (+65%)
- In Hounslow was the utilities and waste sector (+100%)
- In Slough was the agriculture and mining (+100%)
- In South Bucks was the transport (+35%)
- In Spelthorne was the utilities and waste sector (+75%)

Largest Growing Sectors (2013-2018)



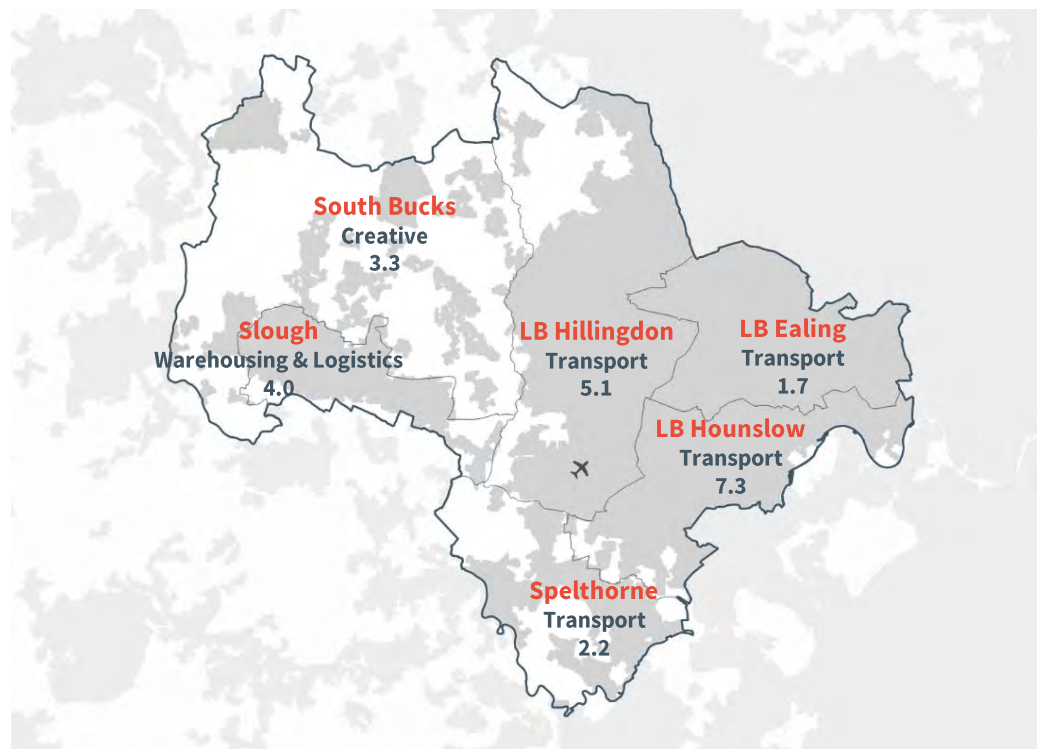
Percentage growth (+ absolute growth)	Largest Growing Sector	2 nd Largest Growing Sector	3 rd Largest Growing Sector	4 th Largest Growing Sector
HISA	Construction 57% (+2,840)	Business Support Services 54% (+2,240)	ICT & Digital 38% (+705)	Warehousing & Logistics 37% (+30)
<i>Ealing</i>	<i>Business Support Services</i> 72% (+640)	<i>Transport</i> 72% (+240)	<i>Construction</i> 70% (+1,010)	<i>Warehousing & Logistics</i> 48% (+95)
<i>Hillingdon</i>	<i>Construction</i> 65% (+805)	<i>Business Support Services</i> 55% (+485)	<i>ICT & Digital</i> 50% (+555)	<i>Warehousing & Logistics</i> 46% (+90)
<i>Hounslow</i>	<i>Utilities & Waste</i> 100% (+20)	<i>Construction</i> 57% (+505)	<i>Business Support Services</i> 46% (+385)	<i>Financial and Professional Services</i> 31% (+670)
<i>Slough</i>	<i>Agriculture & Mining</i> 100% (+5)	<i>ICT & Digital</i> 66% (+490)	<i>Construction</i> 64% (+235)	<i>Transport</i> 64% (+190)
<i>South Bucks</i>	<i>Transport</i> 35% (+35)	<i>Business Support Services</i> 34% (+115)	<i>ICT & Digital</i> 25% (+95)	<i>Utilities and Waste</i> 20% (+5)
<i>Spelthorne</i>	<i>Utilities & Waste</i> 75% (+15)	<i>Construction</i> 40% (+205)	<i>Business Support Services</i> 35% (+110)	<i>Warehousing & Logistics</i> 31% (+20)
England	Warehousing and Logistics 74%	Business Support Services 56%	Transport 49%	Utilities and Waste 33%

Specialised Employment Sectors

The table across shows location quotients (LQ) for the different areas per employment sector. Location quotients indicate the concentration of employment in an area compared to England (an LQ of greater than 1 shows a higher concentration of employment in that area than that seen nationally).

The HISA's specialism strength lies in the transport sector, which is 4 times more specialized than the national picture. Other employment sectors which are particularly prominent in the HISA economy include ICT and digital (1.8), warehousing and logistics (1.5) and wholesale (1.4).

Most Specialised Sectors (2017)



	Most Specialised Sector	2 nd Specialised Sector	3 rd Specialised Sector	4 th Specialised Sector
HISA	Transport 4.1	ICT & Digital 1.8	Warehousing & Logistics 1.5	Wholesale 1.4
Ealing	Transport 1.7	Other Services 1.7	Wholesale 1.7	Creative 1.7
Hillingdon	Transport 5.1	Business Support Services 1.6	Wholesale 1.2	Warehousing & Logistics 1.1
Hounslow	Transport 7.3	ICT & Digital 3.1	Wholesale 1.2	Creative 1.2
Slough	Warehousing & Logistics 4	ICT & Digital 2.7	Utilities & Waste 2.6	Transport 1.6
South Bucks	Creative 3.3	Other Services 2.2	Wholesale 2	Construction 1.2
Spelthorne	Transport 2.2	ICT & Digital 2	Utilities & Waste 1.9	Construction 1.9

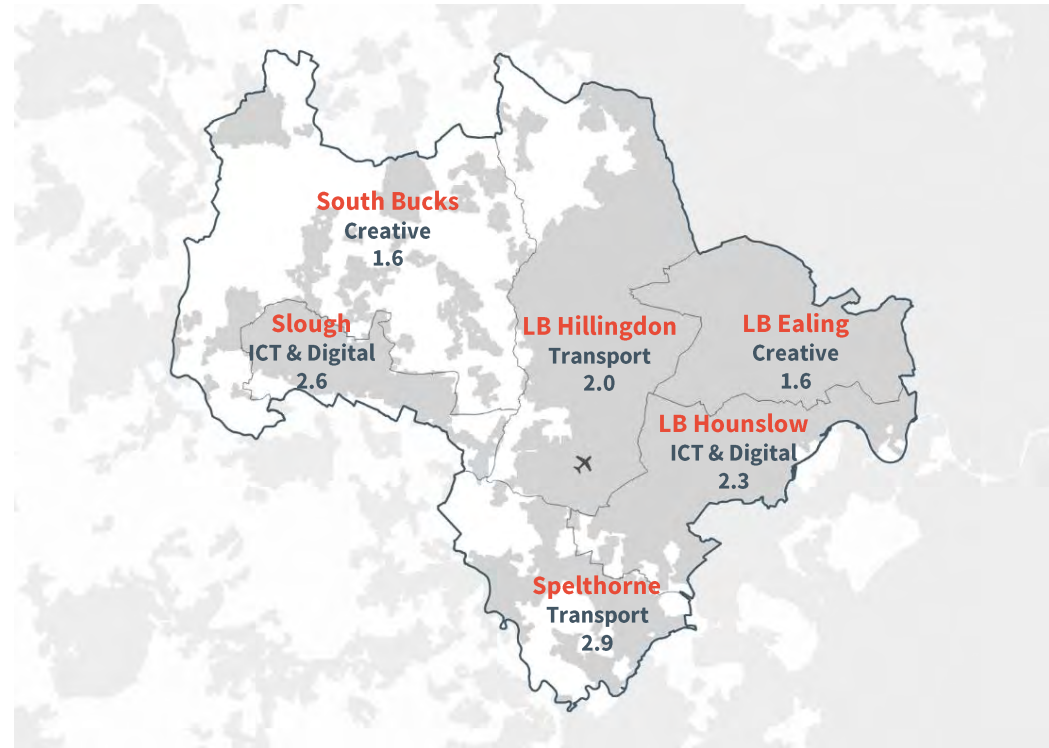
Specialised Business Sectors

The table across shows location quotients (LQ) for the different areas per business sector. Location quotients indicate the concentration of business activity in an area compared to England (an LQ of greater than 1 shows a higher concentration of business activity in that area than nationally).

The HISA's business specialism strength lies in the ICT & digital sector, which is 1.8 times more specialised than the rest of the country. Other business sectors which are particularly prominent in the HISA economy include wholesale (sector specialization of 1.3 relative to the UK average), warehousing and logistics (1.2) and creative (1.2).

It is interesting to note that transport does not appear as one of the most specialised sectors in the HISA. This could be explained by the transport sector being typically characterised by larger businesses, that employ a greater amount of people.

Most Specialised Sectors (2018)



	Most Specialised Sector	2 nd Specialised Sector	3 rd Specialised Sector	4 th Specialised Sector
HISA	ICT & Digital 1.8	Wholesale 1.3	Warehousing & Logistics 1.2	Creative 1.2
Ealing	Creative 1.6	ICT & Digital 1.5	Wholesale 1.5	Construction 1.1
Hillingdon	Transport 2	ICT & Digital 1.6	Warehousing & Logistics 1.4	Construction 1.2
Hounslow	ICT % Digital 2.3	Transport 1.5	Creative 1.4	Wholesaling & Logistics 1.2
Slough	ICT & Digital 2.6	Transport 2.5	Warehousing & Logistics 2.2	Wholesale 1.4
South Bucks	Creative 1.6	Financial & Professional Services 1.4	ICT & Digital 1.3	Other Services 1.3
Spelthorne	Transport 2.9	ICT & Digital 1.7	Utilities & Waste 1.4	Construction 1.2

Focus on: Logistics

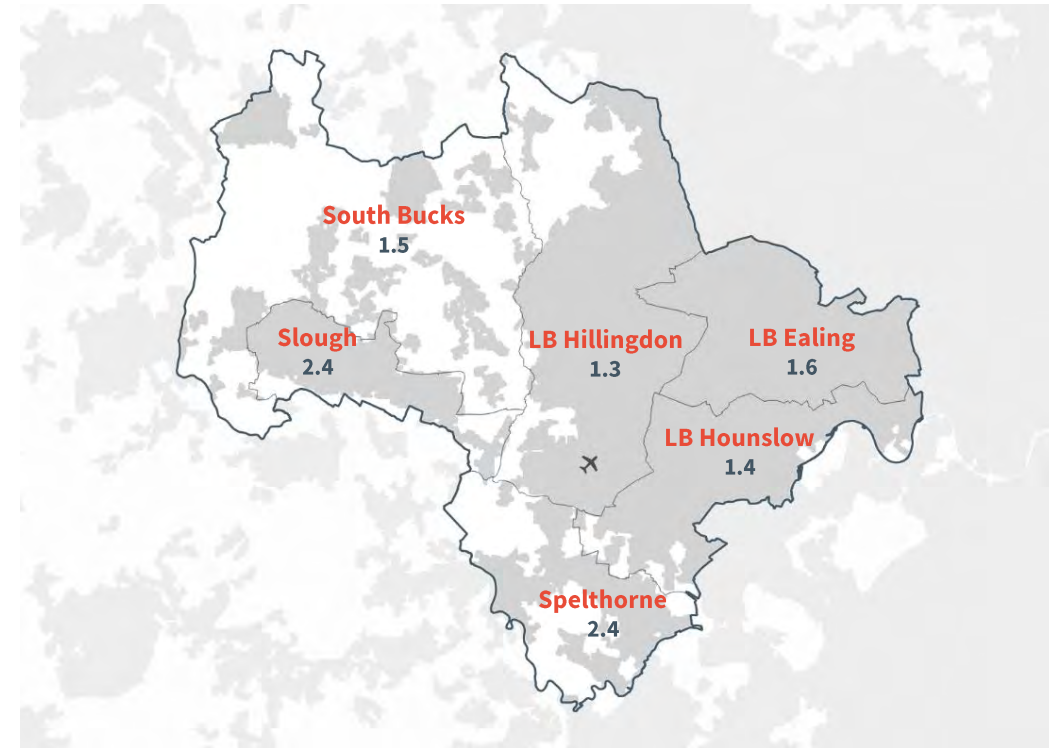
Out of the 645,000 people employed in the HISA in 2017, there were **72,600 people and 5,855 businesses working in the logistics sector**. LB Hillingdon and Slough account for the largest share of people employed in this sector.

Both Slough and LB Hounslow have seen their logistics employment decline. In Slough, most of the logistics employment was lost in the sub-sectors of other transportation support activities (-750 jobs) and wholesale of fruit and vegetable juices, mineral waters and soft drinks (-380). In South Bucks, most of the logistics employment was lost in the sub-sectors of wholesale pharmaceutical goods (-1,800) and unlicensed carriers (-1,250).

Location quotient figures for Slough, Spelthorne indicate that they are strongly specialised in logistics activities. Within the wider HISA, employment and business activity within the logistic sector is respectively 1.6 and 1.3 times more specialised than across England.

However, the **HISA's employment and business growth (+1% and +17%) in the logistics sector have stalled relative to England's growth (+10% and +26%)**.

Logistics Specialism - Employment (2017)



	Total Jobs	Job Growth	LQ	Total Businesses	Business Growth	LQ
HISA	72,610	1%	1.6	5,855	17%	1.3
<i>Ealing</i>	15,895	3%	1.7	1,755	25%	1.2
<i>Hillingdon</i>	17,355	5%	1.3	1,250	27%	1.3
<i>Hounslow</i>	15,845	-16%	1.4	1,220	14%	1.3
<i>Slough</i>	13,605	-1%	2.4	870	40%	2.0
<i>South Bucks</i>	4,095	13%	1.5	330	18%	0.9
<i>Spelthorne</i>	5,035	26%	2.0	535	-27%	1.7
England	1,853,375	10%	1.0	171,155	26%	1.0

Focus on: Construction

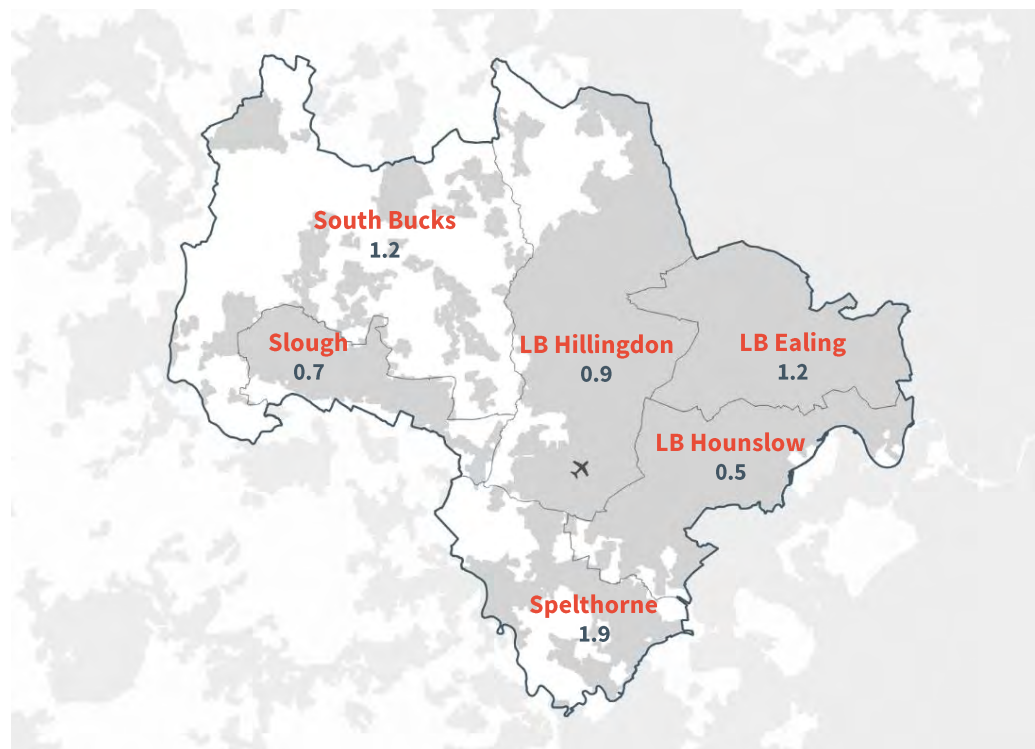
In 2017, the construction sector in the HISA accounted for 29,575 jobs and 7,790 businesses.

Compared to the national location quotient for employment activity in the construction sector, the HISA is less specialised.

Employment growth in the HISA's construction sector is in line with the national growth rate. However, since 2012, the number of jobs in this sector has grown significantly in LB Ealing (+43%), LB Hillingdon (+28%) and South Bucks (+24%). In LB Hounslow, employment has declined by 19% over the same period.

The number of construction businesses in the HISA has increased at almost double the rate (+57%) than that at the national level (+30%). LB Ealing, LB Hillingdon and Slough have shown particular strong business growth in this sector over the past five years.

Construction Specialism - Employment (2017)



	Total Jobs	Job Growth	LQ	Total Businesses	Business Growth	LQ
HISA	29,575	18%	0.9	7,790	57%	1.0
<i>Ealing</i>	8,310	43%	1.2	2,450	70%	1.1
<i>Hillingdon</i>	8,335	28%	0.9	2,050	65%	1.2
<i>Hounslow</i>	4,140	-19%	0.5	1,390	57%	0.8
<i>Slough</i>	2,985	10%	0.7	600	64%	0.8
<i>South Bucks</i>	2,345	24%	1.2	585	16%	0.9
<i>Spelthorne</i>	3,460	16%	1.9	715	40%	1.2
England	1,293,460	18%	1.0	295,810	30%	1

Focus on: Creative & Digital

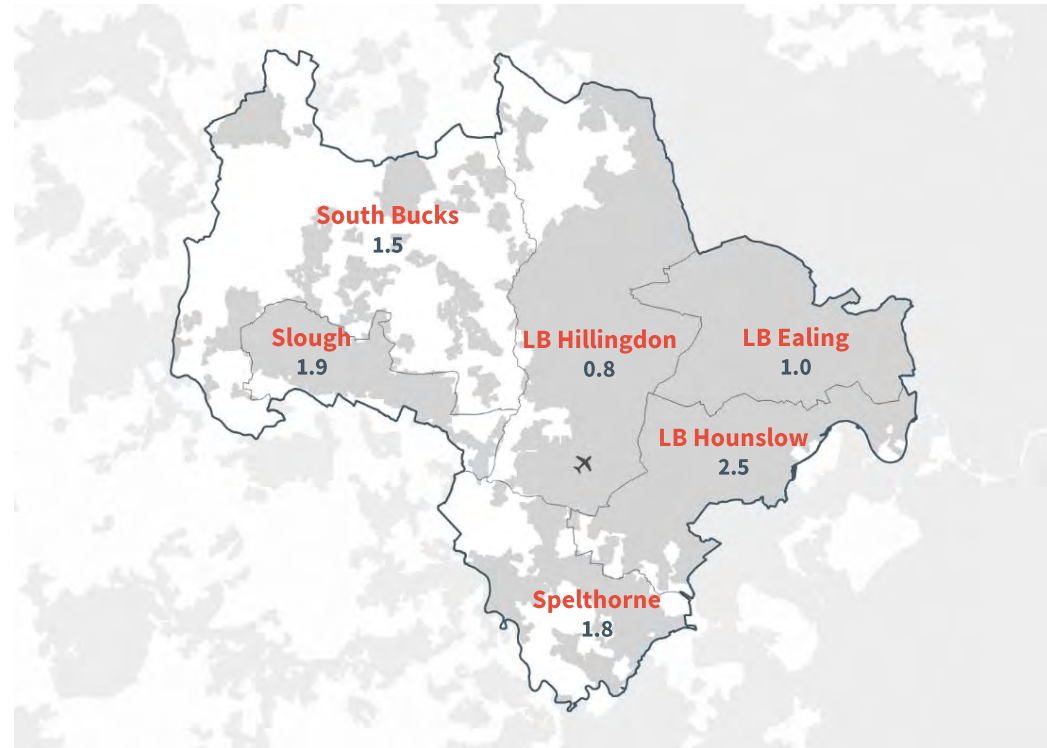
Within the creative and digital sector in the HISA, there are 77,730 people employed across 18,375 businesses.

The creative and digital sector in the HISA is 1.5 times more specialised than England's in terms of employment, and the LQ figures for LB Hounslow, Slough and Spelthorne indicate that they are the most specialised areas in the creative and digital sector across the HISA.

Employment growth in this sector has been particularly strong in LB Hillingdon (+43%) and South Bucks (+36%), but has declined in Slough (-33%). The growth in the creative sector in South Bucks can be in part attributed to the famous Pinewood Studios, which has expanded significantly in recent years.

Slough and LB Hillingdon's business growth rates show positive trajectories, with the number of businesses in each area respectively increasing by 63% and 51%, which is higher than England's rate of 31%.

Creative & Digital Specialism – Employment (2017)



	Total Jobs	Job Growth	LQ	Total Businesses	Business Growth	LQ
HISA	77,730	5%	1.5	18,375	35%	1.6
<i>Ealing</i>	10,920	10%	1.0	4,870	25%	1.3
<i>Hillingdon</i>	12,740	43%	0.8	3,455	51%	1.4
<i>Hounslow</i>	32,655	17%	2.5	5,135	30%	2.1
<i>Slough</i>	12,585	-33%	1.9	2,345	63%	2.1
<i>South Bucks</i>	4,730	36%	1.5	1,245	20%	1.3
<i>Spelthorne</i>	5,300	7%	1.8	1,350	30%	1.6
England	2,151,850	23%	1.0	436,630	31%	1.0

Key findings

*Key findings...***Economy & Enterprise**

1. In recent years, employment in the HISA has grown at a slower rate than England as a whole, while business growth has occurred at a faster rate
2. The HISA has a high proportion of micro businesses
3. It has a higher overall GVA per FTE (£86,700) than England (£70,000), and a higher rate of GVA growth (19%) than England (10%) in the past 5 years.
4. At 10.5%, the HISA has a lower proportion of sole trading activity than England (15.7%)

*Key findings...***Sectors**

1. The transport and business support services sectors employ a larger proportion of people in HISA than England. The transport sector is highly specialised in the HISA.
2. There is a greater ICT & digital sector business presence in the HISA compared to England. This sector is not only a specialism in the HISA but also a growth area.
3. While the construction sector has a similar presence in HISA to England, there has been strong business and employment growth in this sector in recent years.

Key implications

- + The HISA is a strong contributor to the wider economy, with a high productivity (measured as GVA per full-time equivalent employee) and strong business growth.
- + With a strong micro business presence, it will be important to devise a strong business engagement strategy to ensure a wide range of views are heard, that reflects the diversity of local businesses.
- + With Heathrow a major presence in the area, HISA has a strong and highly specialised Transport sector.
- + ICT, Digital & Creative is another specialism in HISA. There has been strong growth in this sector. The floorspace and industry needs of this sector should be interrogated to secure further growth.
- + The Construction sector has also seen strong growth in recent years. With development aspirations and interest in the area this growth is likely to continue.

Chapter 3

People, Place and Well-being

Population and Age Structure

The 2018 Mid Year Population Estimates show that **there are currently 1.2 million people living within the wider HISA**, with the London borough's unsurprisingly accounting for the largest shares of the population.

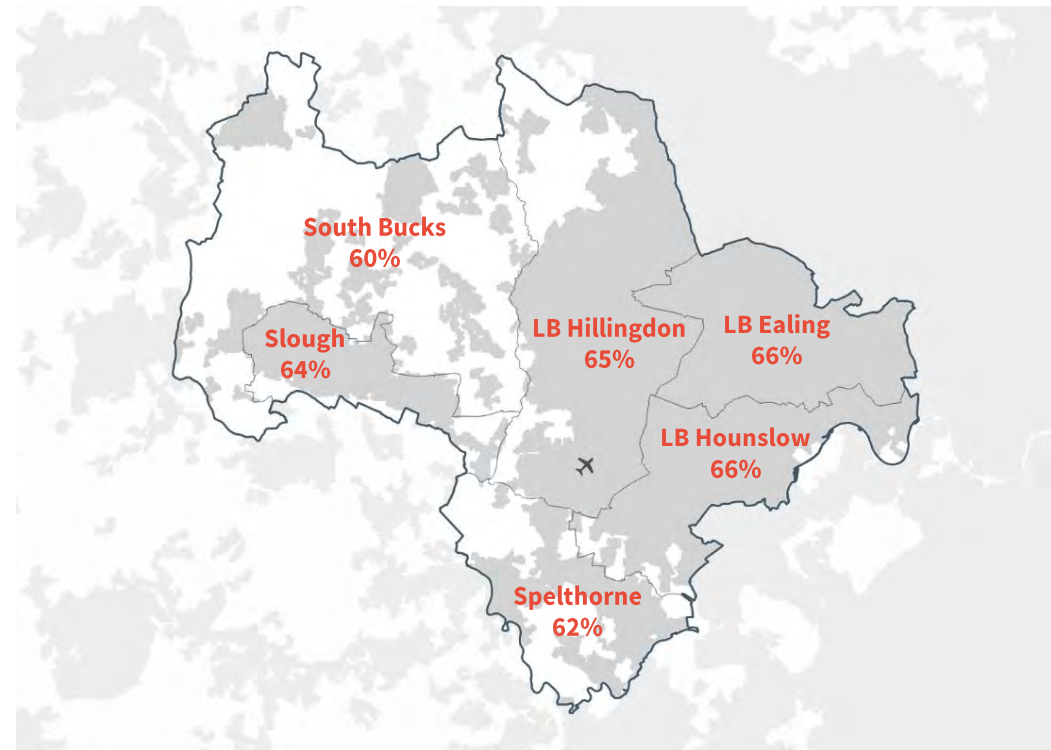
The **HISA is characterised by a younger population relative to that seen nationally**. Here there is:

- + A larger proportion of young people (0-15)
- + A marginally larger proportion of working age people (16-64)
- + A notably smaller proportion of older people (65+)

It is interesting to note that Slough in particular has a high proportion of 0-15 years old and a small proportion of 65+ years old individuals relative to the HISA and England averages, indicating that this is an area with a large concentration of young families.

South Bucks and Spelthorne are characterised by an older population. Here, they both have a relatively small proportion of working age people and a larger population of older people, representing a greater dependency ratio.

Working Age Population (%) (2018)



	0-15 (Total)	0-15 (%)	16-64 (Total)	16-64 (%)	65+ (Total)	65+ (%)	Total
HISA	272,160	22%	798,860	65%	165,060	13%	1,236,080
<i>Ealing</i>	74,140	22%	224,100	66%	43,740	13%	341,980
<i>Hillingdon</i>	66,550	22%	197,640	65%	40,630	13%	304,820
<i>Hounslow</i>	59,330	22%	178,850	66%	32,610	12%	270,780
<i>Slough</i>	39,080	26%	95,190	64%	14,860	10%	149,110
<i>South Bucks</i>	13,530	19%	41,760	60%	14,760	21%	70,040
<i>Spelthorne</i>	19,530	20%	61,340	62%	18,460	19%	99,330
England	19%		63%		18%		

Source: Mid year Population Estimates, 2018

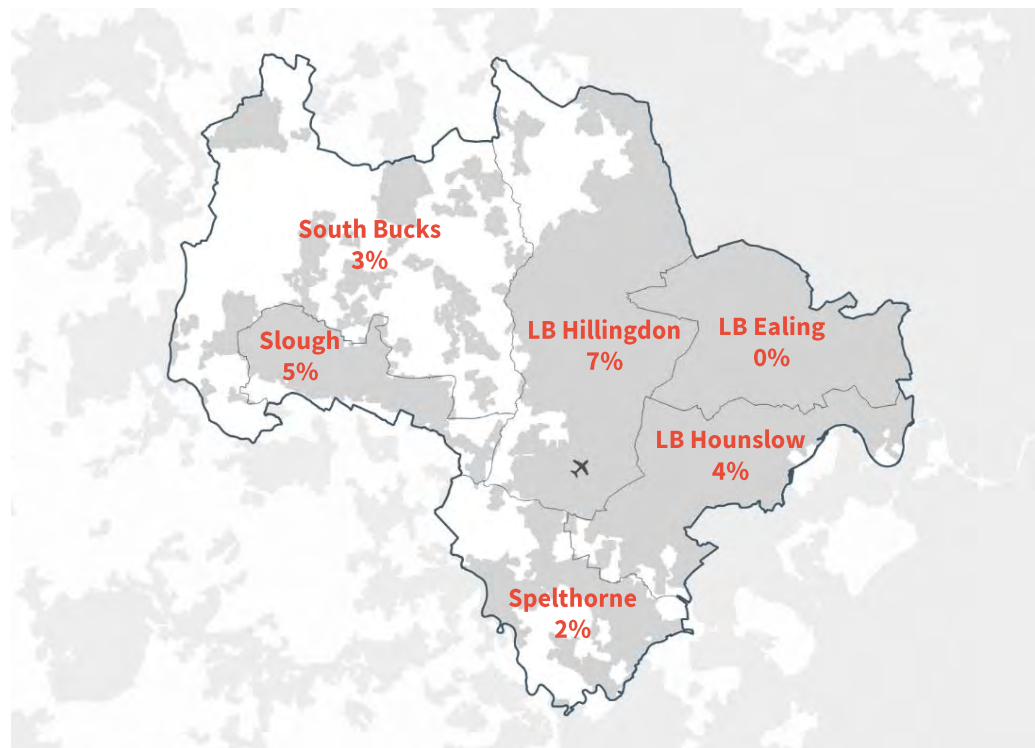
Population Growth

The **population growth** experienced in the HISA over the last five years (+3%) has been felt across a range of different age groups.

The HISA's recent **population growth** has occurred primarily across those aged between 0 and 15 years and over 65 years.

The working age population (16-64) has however grown at a slower rate (+0.5%), especially when compared to the national growth rate (+2%) for this age group. LB Ealing and Spelthorne have also seen their working age population decline by 3% and 1% respectively.

Population Growth (%) (2013-2018)



	0-15 (Total)	0-15 (%)	16-64 (Total)	16-64 (%)	65+ (Total)	65+ (%)	Total
HISA	19,050	8%	3,920	0.5%	15,560	10%	35,530
<i>Ealing</i>	2,570	4%	185,660	-3%	5,300	14%	193,530
<i>Hillingdon</i>	5,940	10%	160,100	5%	3,090	8%	169,310
<i>Hounslow</i>	4,820	9%	150,230	0%	3,990	14%	159,040
<i>Slough</i>	3,750	11%	81,879	1%	1,550	12%	87,170
<i>South Bucks</i>	470	4%	27,780	2%	780	6%	29,030
<i>Spelthorne</i>	1,500	8%	43,730	-1%	850	5%	46,080
England	5%		2%		9%		

Source: Mid year Population Estimates, 2018, 2013

Population Forecasts

The recent growth in HISA’s economy is expected to continue into the future.

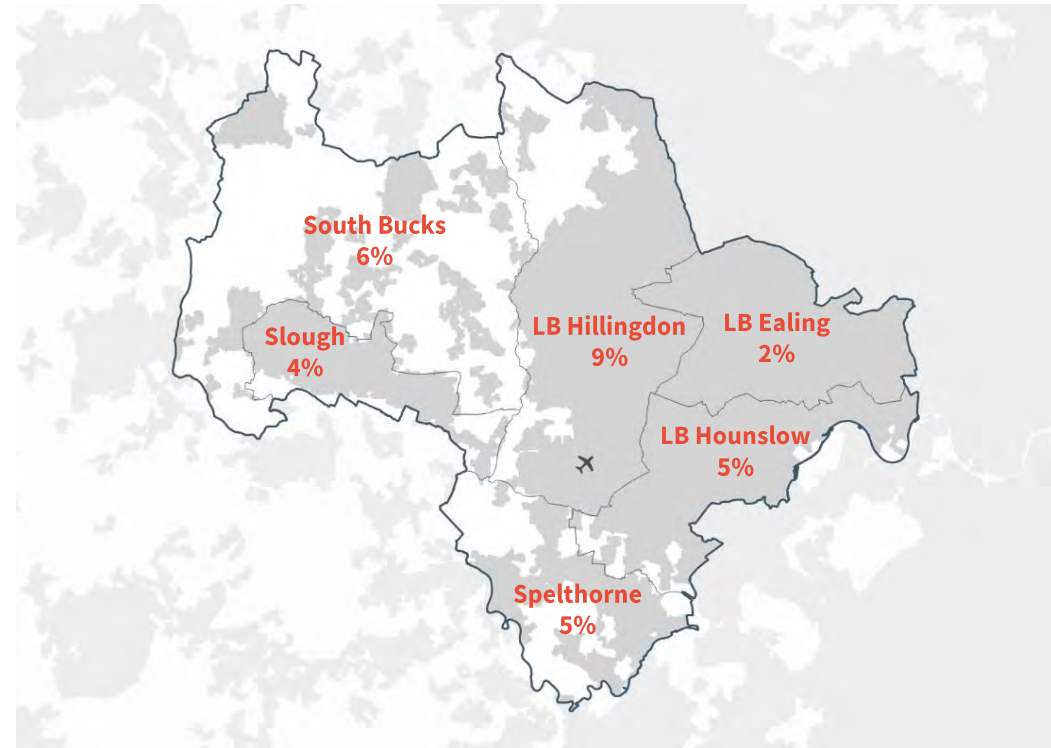
Population forecasts predict that the HISA will continue to see population growth above the national level, especially in LB Hillingdon, and South Bucks where the population is estimated to grow by 16% and 10% over the next twenty years. This is higher than the national average, which stands at 9%.

In the short term (next five years), LB Hillingdon will experience the greatest population growth (+5%) of all the local authorities in the HISA.

In the medium term (next ten years), this trend is expected to continue. Significant population growth will be felt in LB Hillingdon, where it is forecasted that the population will grow by 9%, which is almost twice England’s growth rate (+5%).

This will require additional resources in the future to support this growth, especially around housing provision and accompanying infrastructure. Helping to drive this growth are a number of significant major business and infrastructure investments expected in the HISA over the coming years, including the Gatwick Airport expansion.

Projected Population Growth (%) (2018-2028)



	5 years (Total)	5 years (%)	10 Years (Total)	10 Years (%)	20 Years (Total)	20 Years (%)
HISA	1,286,800	4%	1,313,600	6%	1,357,570	10%
<i>Ealing</i>	350,600	1%	352,810	2%	359,100	4%
<i>Hillingdon</i>	325,530	5%	338,160	9%	356,190	16%
<i>Hounslow</i>	280,920	3%	286,480	5%	295,810	9%
<i>Slough</i>	154,170	2%	156,670	4%	160,510	7%
<i>South Bucks</i>	72,900	3%	74,620	6%	77,450	10%
<i>Spelthorne</i>	102,680	2%	104,860	5%	108,510	9%
England	2%		5%		9%	

Source: ONS Population Projections, 2018

Housing Delivery

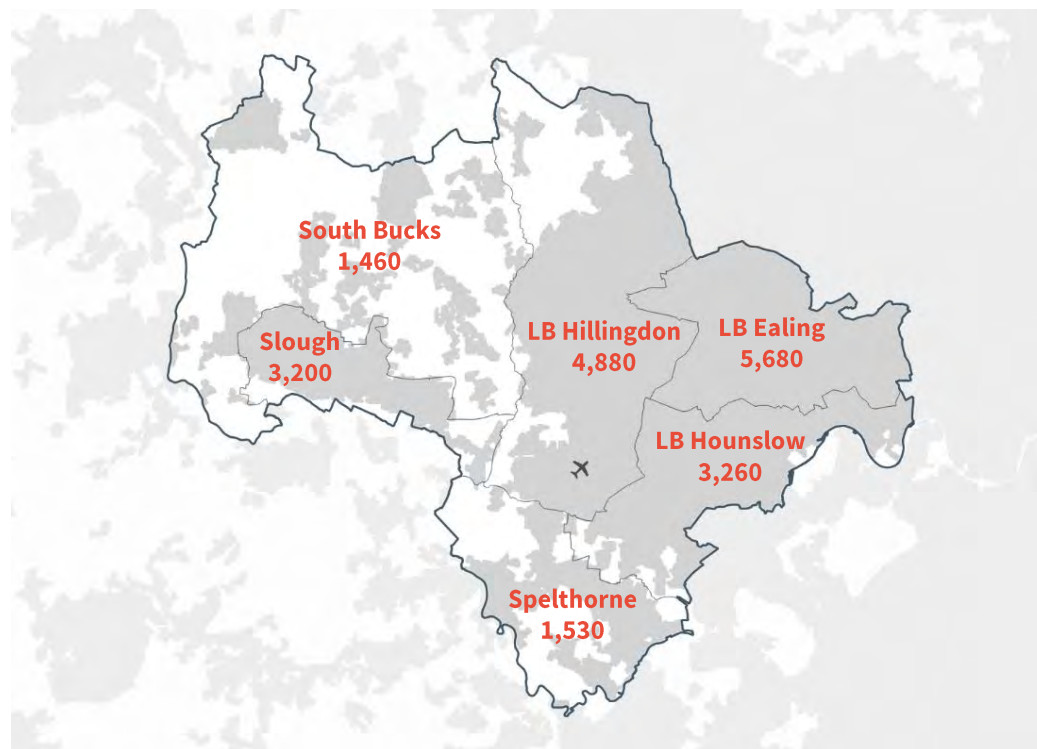
MHCLG provides data on housing delivery and housing targets per annum by local authority.

Local Authorities across the HISA have delivered over 20,000 homes between 2013 and 2018, with most of the housing delivery taking place in LB Ealing and LB Hillingdon.

Over the next five years, **LB Hillingdon and LB Hounslow have been assessed to have the largest housing need across the HISA**. A trend which aligns with current population projection trends in LB Hillingdon over the next five years (+5%), which are the highest across the HISA.

The housing need is relatively low in South Bucks, reflecting the less urbanised nature of the area. That said, this contradicts the population projections that go beyond the national average. With an increasing population and limited supply this is likely to further inflate the already above average house prices in the area.

Housing Delivery (2013-2018)



	Housing delivery over the past 5 years (2013-2018)	Local assessment of housing need (dwellings per annum)
HISA	20,000	6,660
<i>Ealing</i>	5,680	Local assessment of need not available
<i>Hillingdon</i>	4,880	3,080
<i>Hounslow</i>	3,260	1,560
<i>Slough</i>	3,200	930
<i>South Bucks</i>	1,460	340
<i>Spelthorne</i>	1,530	760

Housing Composition

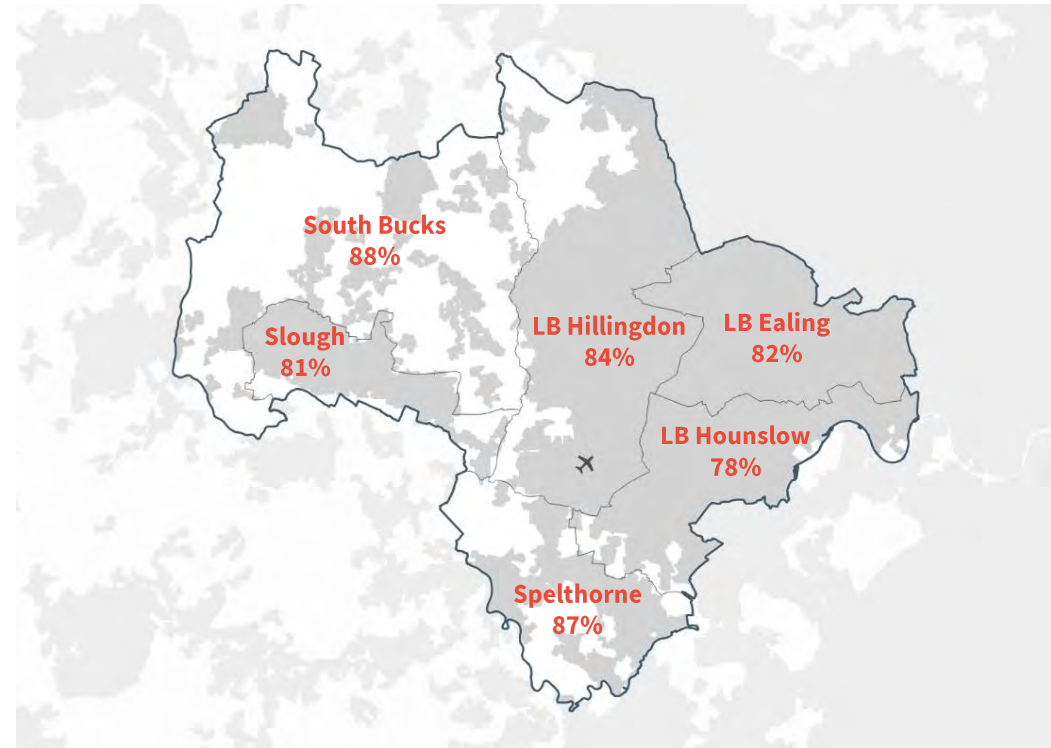
The Ministry of Housing, Communities and Local Government provides data on the tenure characteristics of the dwelling stock of local authorities across England.

Within the HISA, **18% of dwelling units were from the social-rented sector** (including local authority and private registered provider stock) and **82% were from private stock (including private-rented stock and home ownership)**. Proportions which are broadly in line with the national average.

South Bucks and Spelthorne had the highest proportion of private stock. LB Hounslow and Slough provided the highest proportion of socially-rented stock compared to other local authorities in the HISA.

Vacancy levels in the HISA are slightly lower than at the national level, except in LB Ealing and South Bucks where this stands at 3.2% and 3% respectively.

Private Stock (%) (2018)



	Social-rented Stock (Local Authority and Private Registered Provider Stock)	Private Stock (Private Rented and Home Ownership)	Vacancy Levels
HISA	18%	82%	2.0%
<i>Ealing</i>	18%	82%	3.2%
<i>Hillingdon</i>	16%	84%	1.9%
<i>Hounslow</i>	22%	78%	0.7%
<i>Slough</i>	19%	81%	1.1%
<i>South Bucks</i>	12%	88%	3.0%
<i>Spelthorne</i>	13%	87%	1.7%
England	17%	83%	2.5%

Source: MHCLG, 2018, 2013

Housing Affordability

Median house prices in the HISA local authorities are higher than the values seen nationally, reflecting the high demand for houses across the area. The highest median house price is in South Bucks, which is more than twice the national median house price. The lowest median house price can be found in Slough at £206,000.

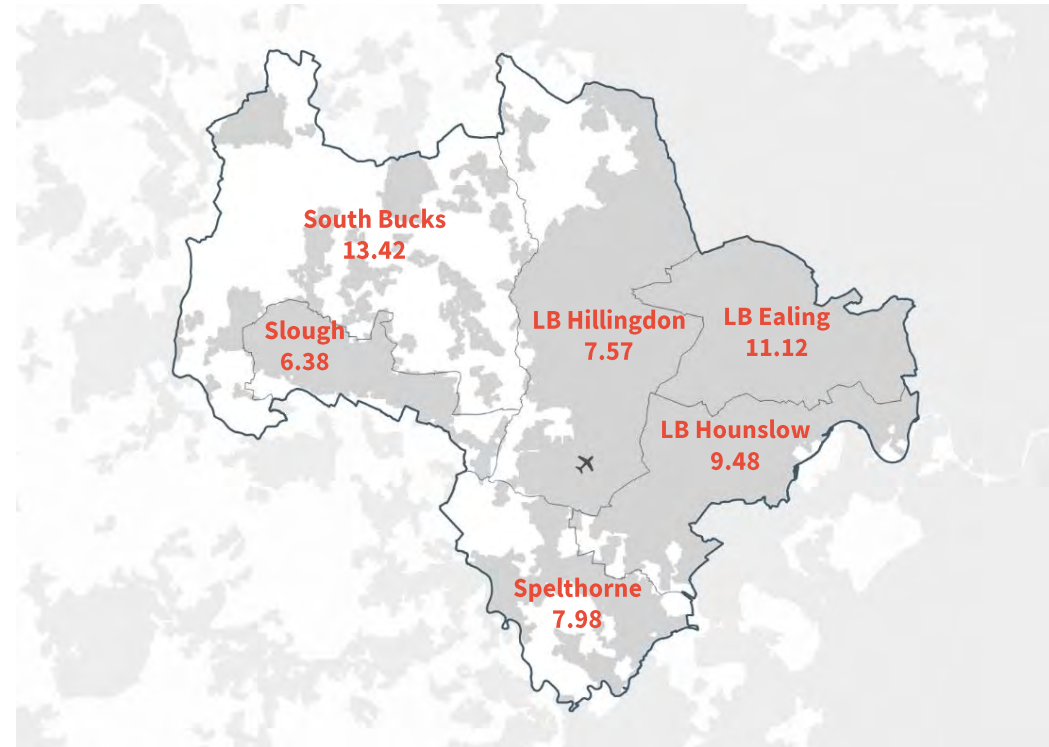
The median earnings to house prices ratio, is a key indicator of housing affordability. Here, each of the HISA local authorities are above the national position apart from Slough.

The wide variability in both affordability ratios and house prices indicates that the housing markets operating within this area are very different and translates into housing inequalities between the different local authorities. It is likely that this limits migration and social upward mobility in the area.

In South Bucks and LB Ealing, house prices are now respectively 13.42 and 11.12 times the average salary in the area, considerably above the England ratio of 6.72.

Private rental values are also high in the HISA and the data indicates that some of the most expensive weekly rents paid in the private sector are found in LB Hounslow, LB Hillingdon and LB Ealing.

Ratio Median Earnings to House Prices (2018)



	Median Earnings to House Prices Ratio	Median House Prices	Private Rental Values (£ per week)
HISA	n/a	n/a	n/a
<i>Ealing</i>	11.12	£ 340,000	£ 122.20
<i>Hillingdon</i>	7.57	£ 261,000	£ 124.35
<i>Hounslow</i>	9.48	£ 293,028	£ 124.99
<i>Slough</i>	6.38	£ 206,000	£ 97.52
<i>South Bucks</i>	13.42	£ 395,000	£ 115.35
<i>Spelthorne</i>	7.98	£ 270,000	£ 112.37
England	6.72	£ 184,000	£ 95.59

Barriers to Housing & Services – relative performance

The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Barriers to Housing & Services Domain measures distance to services such as post offices, supermarkets and GP surgeries, as well as household overcrowding, homelessness and housing affordability.

The HISA is significantly worse-performing in this Domain compared to England, though there is significant variation in scores across the area.

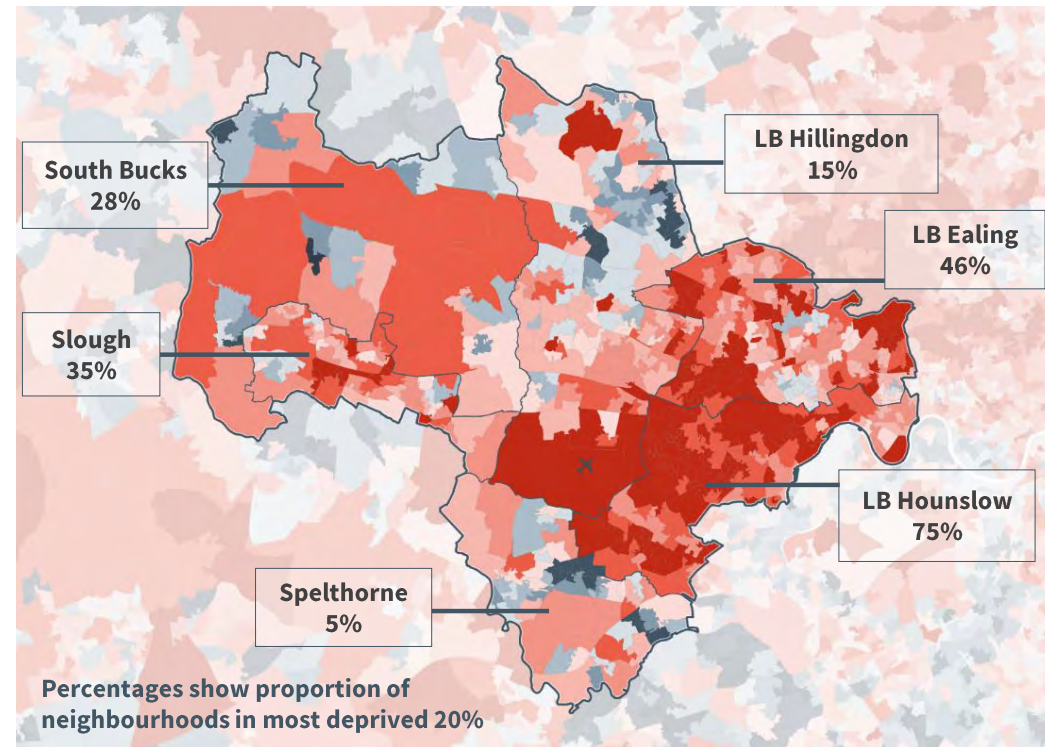
The HISA has a higher proportion of deprived neighbourhoods in this Domain than England as a whole, with **39% of neighbourhoods within the area in the most deprived quintile (bottom 20%)** of neighbourhoods in England.

Deprivation of housing and services is disproportionately high in Hounslow and Ealing. **Almost half (46%) of all neighbourhoods in Hounslow are in the most deprived 10% of the country by this measure.** Three quarters (75%) are in the most deprived quintile of the country. In Ealing, almost half (46%) of all neighbourhoods are in the most deprived quintile of the country.

Only 3% of neighbourhoods in the HISA are in the highest quintile (top 20%) of neighbourhoods for this Domain in England.

With housing affordability not the only driver in this Domain, access to services is likely a key driver of deprivation. There is notable concentration of housing and services related deprivation outside of London, in areas where affordability is less of a concern.

IMD – Barriers to Housing (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	0%	3%	7%	20%	39%
<i>Ealing</i>	0%	0%	0%	27%	46%
<i>Hillingdon</i>	0%	5%	14%	6%	15%
<i>Hounslow</i>	0%	0%	0%	46%	75%
<i>Slough</i>	0%	0%	0%	13%	35%
<i>South Bucks</i>	3%	8%	25%	0%	28%
<i>Spelthorne</i>	0%	15%	27%	0%	5%
England	10%	20%	30%	10%	20%

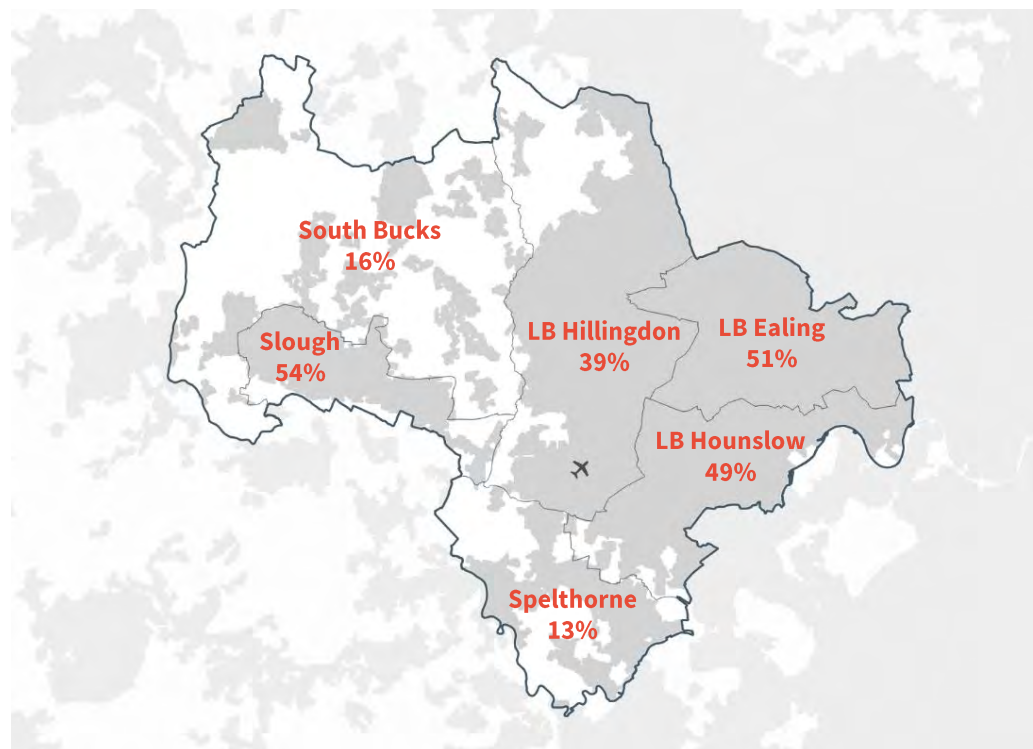
Source: Indices of Multiple Deprivation, 2015

Ethnicity

The HISA has a highly diverse population, with around 43% of the population coming from a background other than white, compared to 15% nationally. Asian/Asian British make up the largest share of the BAME population 28%) across the HISA.

It's important to note that this level of diversity is spread unevenly across the HISA. Here, Ethnic diversity is particularly strong in Slough (54% of the population), LB Ealing (51%) and LB Hounslow (49%). Whereas the proportion of the population coming from a white background is highest in Spelthorne (87%) and South Bucks (84%), which aligns with the national average of 85%.

Proportion BAME Population (%) (2011)



	White	Mixed/ Multiple Ethnic Groups	Asian /Asian British	Black/Africa n/Caribbean /Black British	Other Ethnic Group
HISA	57.0%	3.8%	28.0%	7.5%	3.6%
<i>Ealing</i>	49.0%	4.5%	29.7%	10.9%	6.0%
<i>Hillingdon</i>	60.6%	3.8%	25.3%	7.3%	3.0%
<i>Hounslow</i>	51.4%	4.1%	34.4%	6.6%	3.6%
<i>Slough</i>	45.7%	3.4%	39.7%	8.6%	2.6%
<i>South Bucks</i>	84.3%	2.4%	11.3%	1.1%	1.0%
<i>Spelthorne</i>	87.3%	2.5%	7.6%	1.6%	1.0%
England	85.4%	2.3%	7.8%	3.5%	1.0%

Source: Census 2011

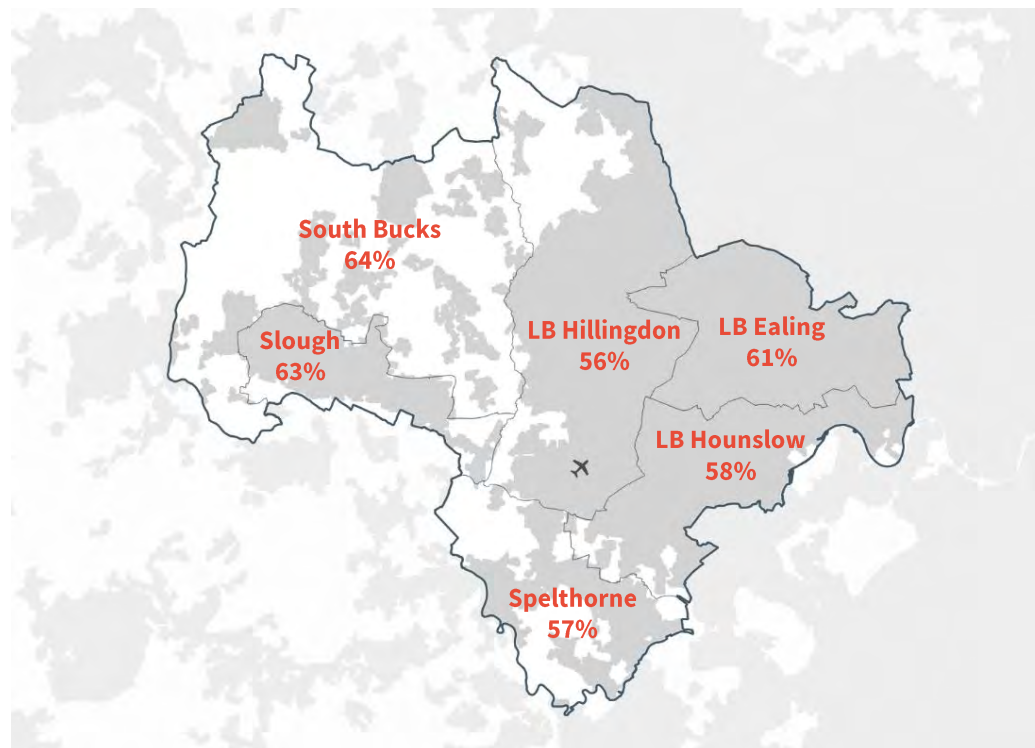
Resident Background

The ONS provides information on the number of EU Registered Adult Overseas Nationals, which is useful for understanding migration flows and characteristics of residents in the HISA.

In 2018, the **majority of overseas residents came from the European Union (59%)**, 29% came from Asia, 8% came from the rest of the world and 3% came from the rest of Europe (non-EU).

Compared to the national average, the proportion of Asian residents in the HISA is high and the proportion of residents from the rest of the world is relatively low. However, in South Bucks, 17% of residents are from the rest of the world compared to the 8% average in the HISA.

EU Registered Adult Oversea Nationals (%) (2018)



	EU	Non-European Union (Other Europe)	Asia	Rest of the World	Unknown
HISA	59%	3%	29%	8%	0%
<i>Ealing</i>	61%	3%	26%	10%	0%
<i>Hillingdon</i>	56%	4%	32%	8%	0%
<i>Hounslow</i>	58%	4%	32%	6%	0%
<i>Slough</i>	63%	2%	29%	6%	-
<i>South Bucks</i>	64%	3%	16%	17%	-
<i>Spelthorne</i>	57%	2%	29%	12%	-
England	62%	3%	22%	12%	1%

Source: Department for Works and Pensions, 2019

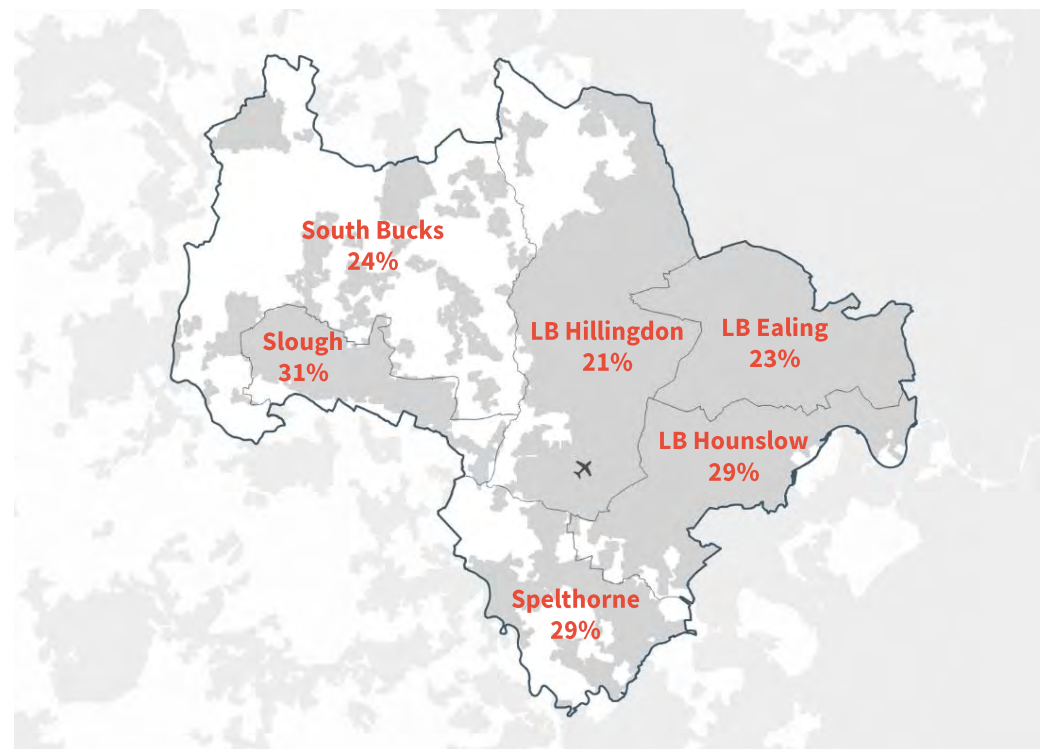
Education

Schools in the HISA perform, on average, better than England, in terms of pupil attainment and school rating.

South Bucks is best-performing in terms of pupil attainment, with the average KS4 attainment 8 score at 55, and 92% of KS5 pupils either going on to or remaining in education or employment.

Slough, Ealing and Spelthorne record the highest school ratings, with 31%, 29% and 29% schools in each district respectively receiving Outstanding scores. All local authorities in the HISA perform above the average for England under this indicator.

% 'Outstanding' school ratings (2018)



	KS4 Attainment	KS5 Attainment	Ofsted School Rating
	Average attainment 8 score per pupil (2018)	% pupils going to or remaining in education & employment (2017)	% rated Outstanding (2019)
HISA	51	90	26
<i>Ealing</i>	50	89	23
<i>Hillingdon</i>	48	88	21
<i>Hounslow</i>	49	90	29
<i>Slough</i>	53	90	31
<i>South Bucks</i>	55	92	24
<i>Spelthorne</i>	50	89	29
England	45	89	20

Source: Local authority interactive tool, 2018

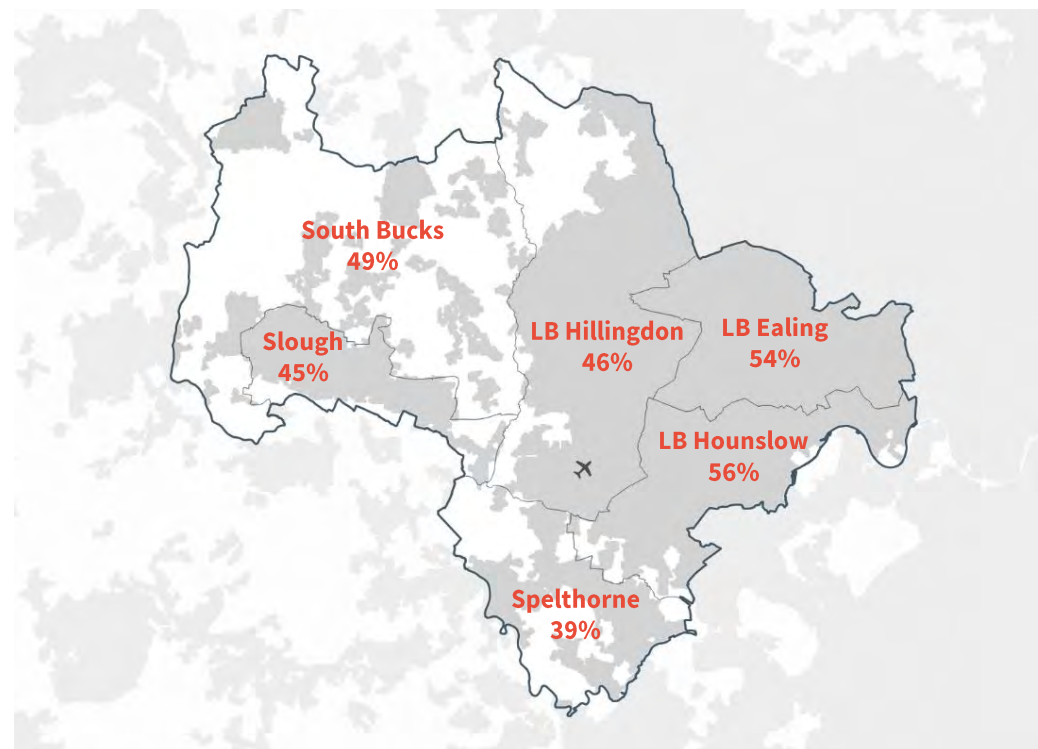
Qualifications

The ONS APS 2017/18 provides data on the NVQ levels of working-age residents (employed and not employed) in the HISA. The framework of National Vocational Qualifications (NVQs) is used to indicate levels of educational qualifications within the workforce. For example, in England NVQ level 1 approximates to one GCSE at grades 3-1 (formerly D-G), level 2 to one GCSE at grades 9-4 (formerly A*-C), level 3 to A levels at A*-C, level 4 to higher education, and level 5 to post-graduate qualifications.

This data shows that overall, **the HISA has strong qualification levels**, with 50% of residents obtaining NVQ4+ qualifications compared to 40% in England.

These figures fluctuate starkly across the HISA, with LB Hounslow having 56% of its workforce qualified to NVQ4+ and Spelthorne having 39% of its workforce qualified to NVQ4+, which is still in line with the national average.

Working Age Pop with NVQ4+ (2018)



	Residents with NVQ1	Residents with NVQ2	Residents with NVQ3	Residents with NVQ4+	Residents with no degree level qualifications
HISA	10%	15%	16%	50%	9%
<i>Ealing</i>	9%	12%	16%	54%	10%
<i>Hillingdon</i>	9%	16%	17%	46%	9%
<i>Hounslow</i>	9%	13%	13%	56%	9%
<i>Slough</i>	9%	17%	17%	45%	10%
<i>South Bucks</i>	9%	17%	19%	49%	4%
<i>Spelthorne</i>	9%	21%	22%	39%	6%
England	9%	19%	20%	40%	9%

Education, Skills & Training - relative performance

The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Education, Skills and Training Domain measures the lack of attainment and skills in the local population, from children and young people to adults.

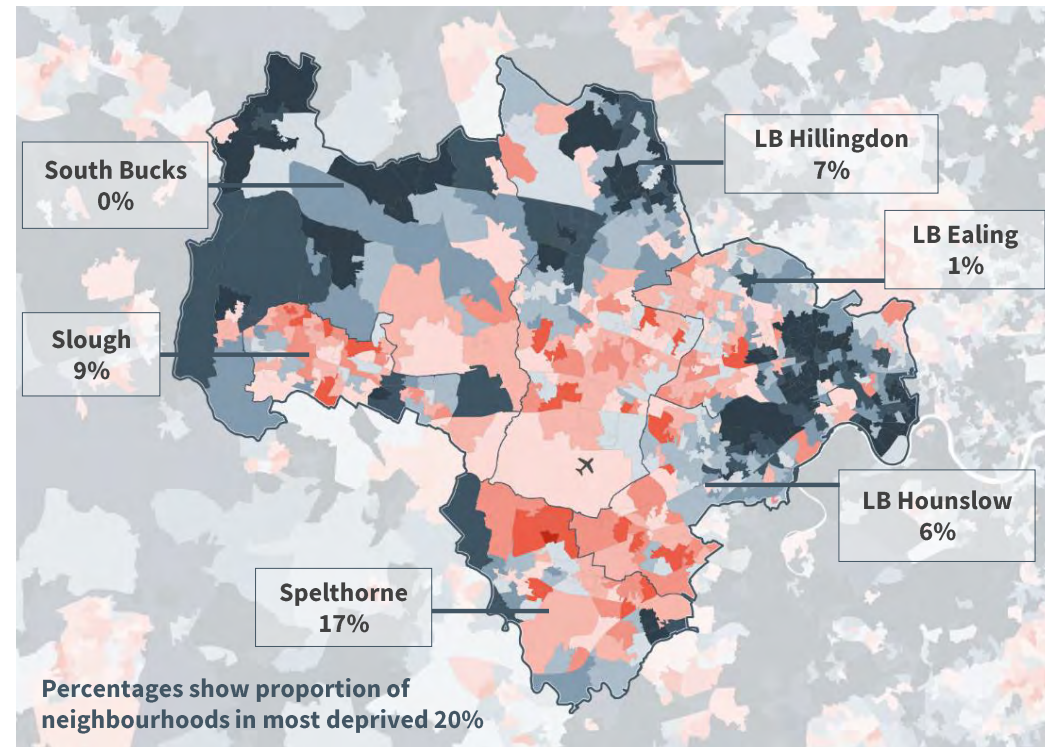
The HISA performs relatively well in attainment of education, skills and training compared to other neighbourhoods in the country.

Overall, it has a low level of representation in lowest deciles (bottom 10% and 20% of neighbourhoods) of England for this Domain, and a marginally higher level of representation in the highest three deciles (top 30% of neighbourhoods).

South Bucks performs disproportionately well, with almost 30% of neighbourhoods in the highest 10% of the country. Ealing is also well-performing, with almost 20% of its neighbourhoods in the top 10% of England.

There remain pockets of Education, Skills and Training deprivation in the HISA, however. Almost 20% of Spelthorne's 60 neighbourhoods are in the least performing 20% of England.

IMD – Education, Skills & Training Deprivation (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	12%	21%	31%	0%	5%
<i>Ealing</i>	19%	28%	40%	0%	1%
<i>Hillingdon</i>	7%	18%	27%	0%	7%
<i>Hounslow</i>	11%	23%	33%	0%	6%
<i>Slough</i>	1%	5%	9%	0%	9%
<i>South Bucks</i>	28%	45%	63%	0%	0%
<i>Spelthorne</i>	3%	10%	18%	2%	17%
England	10%	20%	30%	10%	20%

Labour Market Participation

The ONS APS is the key source of data for labour market outcomes for the HISA's resident population. A key labour market outcome is the employment rate of the working age (16-64) population. The employment rate is those who are in full-time, part-time, or self-employment.

In 2017/18, **the employment rate for the HISA was 75%**, with 602,000 residents out of a working-age population of 805,000 being in either full-time or part-time work or being self-employed. This rate is **slightly below than the level for England (79%)**.

Unemployment levels are higher in all of the HISA's local authorities than at the national level, except for LB Hillingdon where this stands at 3.8% compared to England's 4.2% average.

Youth unemployment (16-24 years) is particularly high, with the HISA average totaling 18% compared to 12% at the national level.

Levels of female unemployment are also higher than male levels in the HISA, and this is particularly the case in LB Ealing and LB Hillingdon.

In LB Hounslow however, the male and female unemployment rates are respectively 9.2% and 3.1%.

Overall, long term unemployment levels in the HISA are broadly similar to the national average, but are slightly lower in South Bucks and Spelthorne.

% of 18-24 unemployed (2018)



	Economic activity rate (16-64)	Employment rate (16-64)	Unemployment rate (16-64)	% of 16-24 unemployed	Male unemployment rate (16-64)	Female unemployment rate (16-64)	Job seekers allowance	Long term unemployment (Claimant Count)
HISA	78.9%	74.7%	5.3%	18.0%	5.1%	5.5%	0.4%	1.7%
Ealing	77.2%	72.5%	6.1%	N.A.	4.4%	8.2%	0.5%	2.2%
Hillingdon	76.9%	78.9%	3.8%	16.2%	3.2%	4.5%	0.6%	1.3%
Hounslow	80.1%	74.6%	6.7%	0.0%	9.2%	3.1%	0.1%	2.3%
Slough	77.2%	73.5%	4.8%	5.7%	4.6%	5.0%	0.2%	1.6%
South Bucks	75.7%	74.4%	N.A.	N.A.	N.A.	N.A.	0.2%	0.6%
Spelthorne	93.0%	87.6%	5.8%	20.0%	N.A.	6.9%	0.4%	0.8%
England	78.9%	78.9%	4.2%	11.6%	4.2%	4.2%	0.5%	1.7%

"N.A." signifies that estimate is not available since the group sample size is zero or disclosive (0-2).
Source: Annual Population Survey 2018

Crime – relative performance

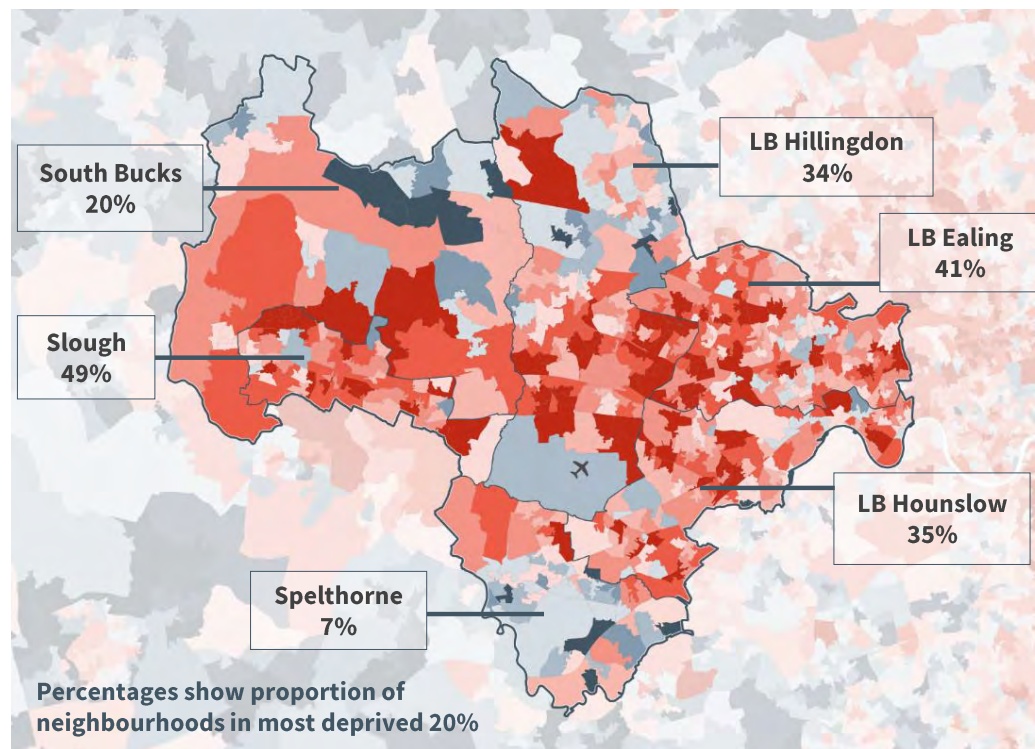
The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Crime Domain measures the risk of personal and material victimisation at local level, incorporating factors such as reported violent crimes, burglaries, theft and criminal damage.

Risk of crime is an important concern in the HISA, with 4 of the 6 local authorities significantly over-represented in the lowest performing quintile of the country (bottom 20%). All are under-represented in the three best performing quintiles of England (top 30%).

Of these, Slough has the highest level of deprivation in the Crime Domain. Almost a quarter (24%) of its neighbourhoods are in the bottom 10% of England, and almost half (49%) in the bottom 20% of the country.

There appears to be some overlap between crime and housing/access to services deprivation. Like with the Housing Domain, neighbourhoods in the top- and bottom-most areas of the study area perform better in the Crime Domain, with the mid section more deprived.

IMD – Crime (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	0%	2%	5%	15%	35%
<i>Ealing</i>	0%	0%	0%	16%	41%
<i>Hillingdon</i>	0%	2%	6%	17%	34%
<i>Hounslow</i>	0%	1%	1%	13%	35%
<i>Slough</i>	0%	0%	3%	24%	49%
<i>South Bucks</i>	0%	10%	18%	5%	20%
<i>Spelthorne</i>	0%	8%	17%	2%	7%
England	10%	20%	30%	10%	20%

Occupations

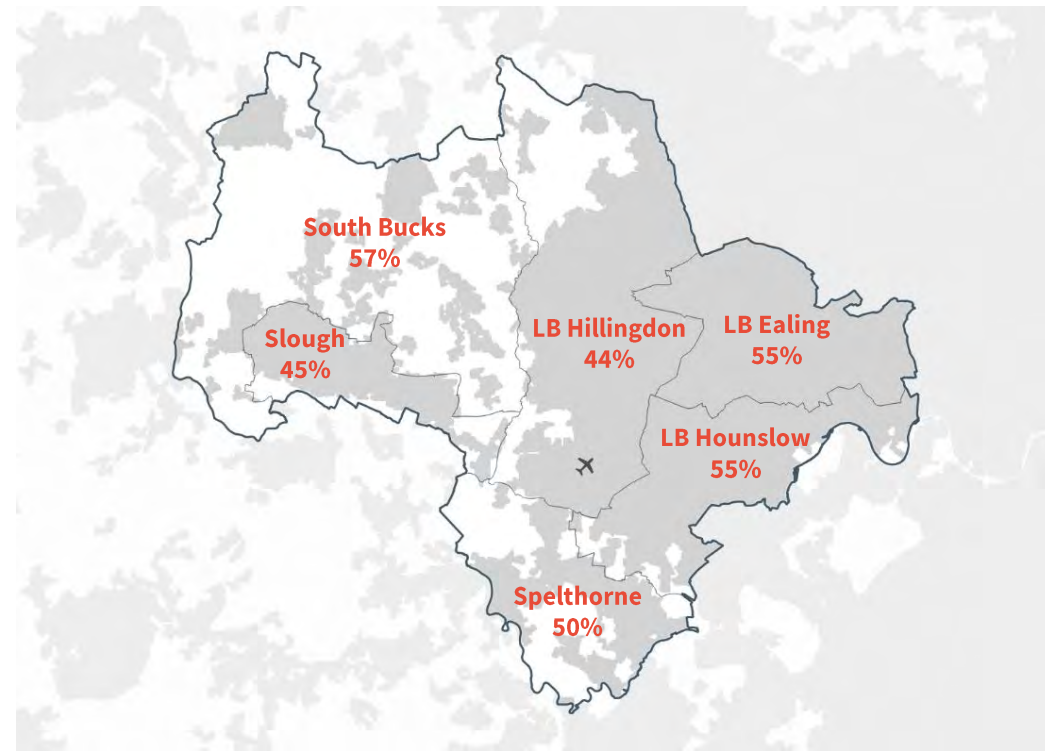
The ONS APS provides data on the occupations of residents and emphasizes the varying picture prevalent across the HISA.

Whilst HISA has a prevalence of Managerial & Professional occupations that is above the national position, there is considerable difference between the individual local authority areas. For instance, whilst LB Hillingdon is below the national average in terms of Managerial & Professional occupations, South Bucks is considerably above this position.

The sectors with the highest employment share in the HISA are public administration, education and health, transport and business support services. Organisations and businesses in these sectors will require a significant amount of knowledge, training and experience from their employees. The high proportion of managerial and professional occupations across the HISA can best be understood in the context of this employment sectoral breakdown and the high-level occupations which these sectors depend on.

The varied occupational picture may also reflect the sectoral composition of the HISA, where areas with a higher degree of more productive and professionalised sectors are likely to have a greater concentration of higher order occupations.

Prof and Higher Managerial Occupations (2018)



	Managerial & Professional		Admin. & Skilled Trades		Caring, Leisure & Sales		Operative & Elementary	
	No.	%	No.	%	No.	%	No.	%
HISA	1,135,700	50%	447,200	18%	401,200	16%	378,200	16%
<i>Ealing</i>	273,900	55%	95,100	13%	72,400	12%	98,800	19%
<i>Hillingdon</i>	283,000	44%	122,400	18%	143,900	22%	104,500	16%
<i>Hounslow</i>	284,900	55%	106,000	18%	84,200	13%	80,800	14%
<i>Slough</i>	123,000	45%	53,300	19%	47,800	17%	59,500	20%
<i>South Bucks</i>	63,600	57%	23,000	18%	17,000	12%	12,400	13%
<i>Spelthorne</i>	107,300	50%	47,400	24%	35,900	17%	22,200	9%
England	47%		20%		16%		17%	

Source: Annual Population Survey 2018

Earnings & Poverty

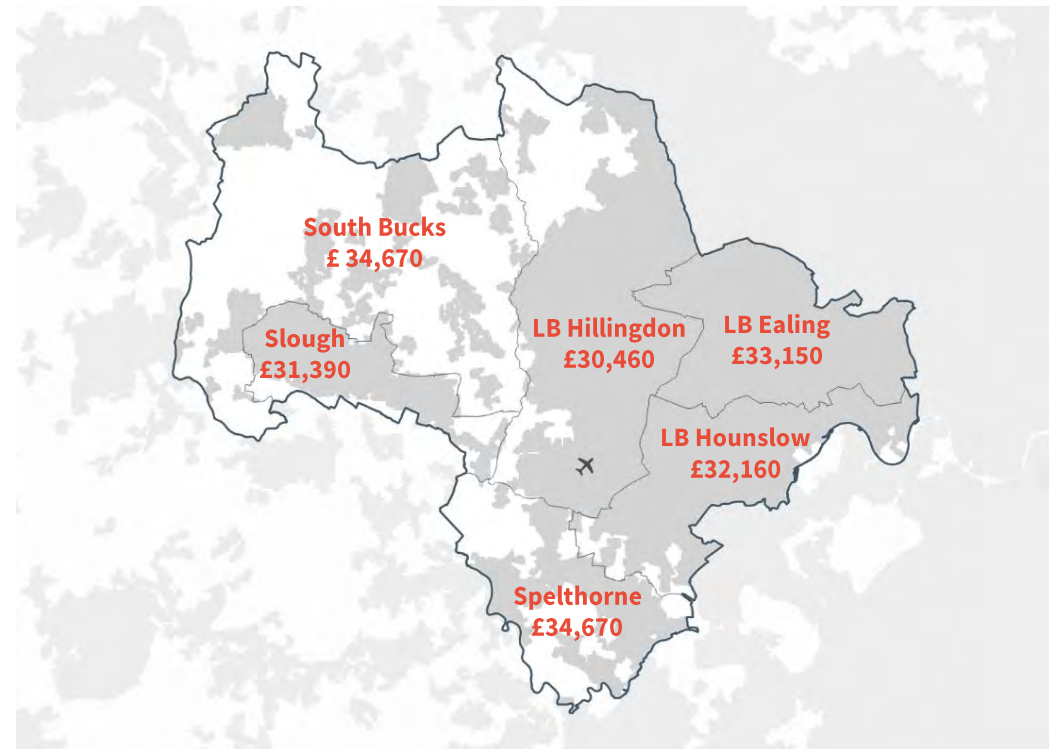
The ONS Annual Survey of Hours and Earnings (ASHE) also provides data on workplace and resident median annual pay. People **working in the HISA earn between an average (median) £29,920 and £36,100** per annum, compared to **those living in the HISA who earn between £30,640 and £34,670**. This is **significantly higher than the England averages**.

It's also interesting to note that **people working in the area earn more than those who commute out**. Typically, the opposite is true for districts on the edge of London - this points to the strength of the local employment base in the HISA.

The percentage of people in fuel poverty provides a means to understand relative poverty at the local level. While most places in the HISA have a similar average to England's rate of 11.1%, South Bucks (7.7%) and Spelthorne (7.5%) have a relatively low proportion of people in fuel poverty.

Another useful proxy to understand poverty levels is the proportion of children (all dependent children under 20) in low income families. This figure is highest in LB Ealing (17.6%) - which is also the borough with the lowest workplace earnings - and lowest in South Bucks (9.7%), compared to England's figure of 17%.

Resident Median Earnings (2018)



	Median earnings-residents	Median earnings - workers	Residents Experiencing Fuel Poverty	Children* in low income families
Ealing	£ 33,150	£ 29,920	10.5%	17.6%
Hillingdon	£ 30,640	£ 31,630	10%	16.3%
Hounslow	£ 32,160	£ 36,100	10.8%	14.3%
Slough	£ 31,390	£ 34,050	11%	15.5%
South Bucks	£ 34,670	£ 31,590	7.7%	9.7%
Spelthorne	£ 34,670	£ 33,140	7.5%	12.4%
England	£ 29,870	£ 29,870	11.1%	17%

* Children are all whole are dependent and under 20. Source: ASHE, 2018, Public Health England, 2018

Income – relative performance

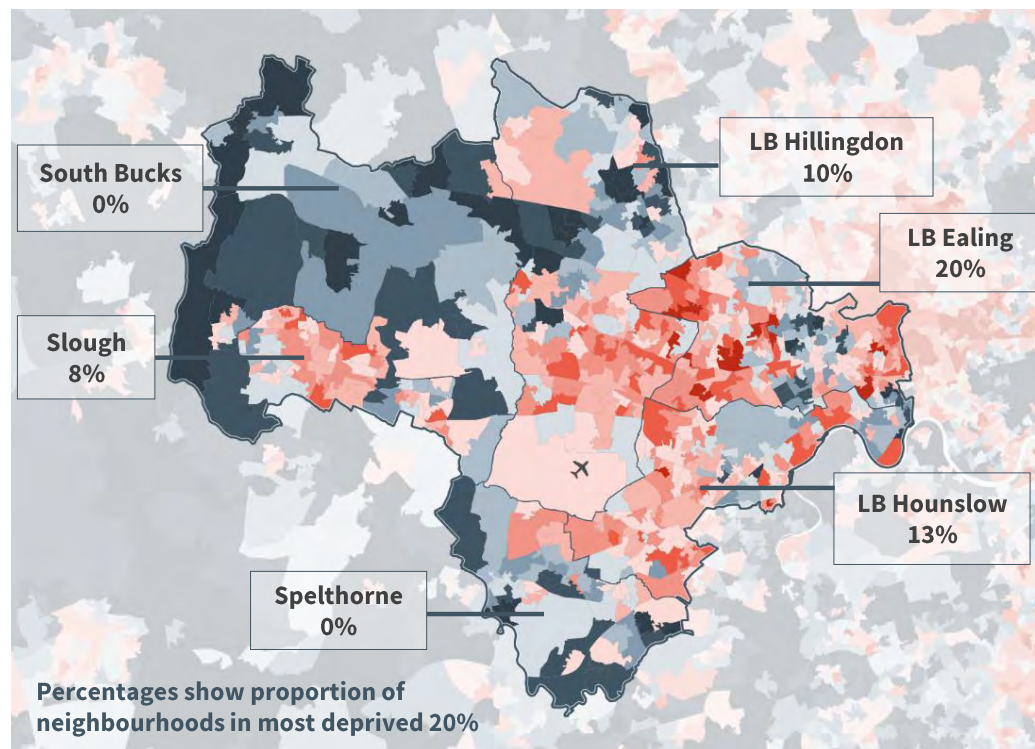
The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Income Deprivation Domain measures deprivation relating to low income, including for people who are out of work, as well as those who are in work but have low earnings.

Overall, the HISA does not perform exceedingly well or poorly in the Income Deprivation Domain. It is under-represented in the very highest and lowest quintiles, indicating overall average income levels compared to the rest of England.

That said, there is a high level of variability in income deprivation across the HISA, and there remain pockets of high deprivation. 20% of neighbourhoods in Ealing are in the most deprived quintile for this Domain, while its remaining neighbourhoods are significantly under-represented in the highest quintiles.

South Bucks and Spelthorne, on the other hand, perform very well in this Domain. Almost 70% of neighbourhoods in South Bucks, for instance, are in the top three deciles (least deprived 30%) for this Domain. No neighbourhoods in South Bucks or Spelthorne are in the lowest quintile (most deprived 20%).

IMD – Income Deprivation (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	5%	12%	20%	3%	12%
<i>Ealing</i>	2%	7%	11%	8%	20%
<i>Hillingdon</i>	7%	14%	22%	1%	10%
<i>Hounslow</i>	1%	4%	11%	1%	13%
<i>Slough</i>	0%	3%	9%	0%	8%
<i>South Bucks</i>	23%	48%	68%	0%	0%
<i>Spelthorne</i>	7%	30%	43%	0%	0%
England	10%	20%	30%	10%	20%

Source: Indices of Multiple Deprivation, 2015

Health

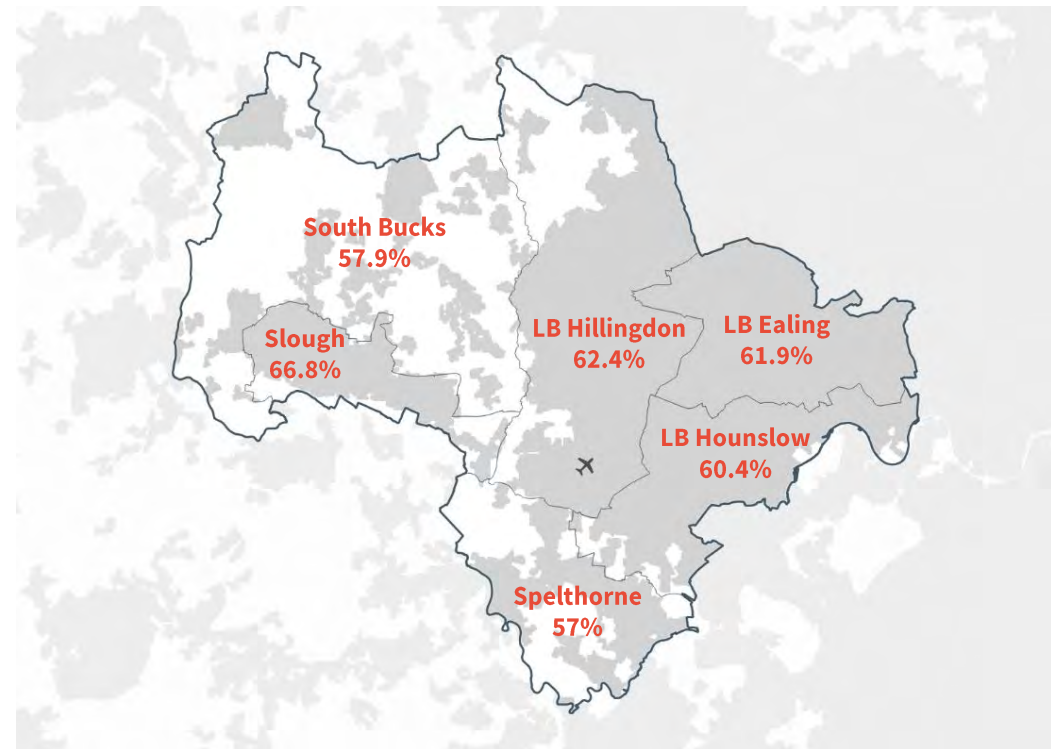
Life expectancy levels across HISA local authorities are high, with the average life expectancy of males and females being higher than England's (except for Slough).

The proportion of adults classified as overweight or obese varies slightly across the HISA, with Slough reported as having the highest rate (66.8%) and Spelthorne the lowest rate (57%). In comparison, England's average stands at 62%.

England's proportion of people reporting depression or anxiety is 13.7%, which is relatively higher than most local authorities in the HISA. This trend can also be observed in the proportion of people reporting long term limiting illness in England versus the HISA.

These indicators show that overall, the HISA has a relatively healthy population, compared to England.

Overweight and Obesity Levels (2018)



	Life Expectancy (years)		% of adults classified as overweight or obese	% reporting depression or anxiety	Long term limiting illness
	Male	Female			
Ealing	80.9	84.6	61.9%	11.2%	14.1%
Hillingdon	80.8	83.8	62.4%	11.6%	14.3%
Hounslow	80	84	60.4%	11.5%	13.8%
Slough	78.4	82.5	66.8%	11.5%	13.4%
South Bucks	81.8	84.4	57.9%	9.7%	13.9%
Spelthorne	80.7	84.2	57%	12.5%	14.9%
England	79.6	83.1	62%	13.7%	17.6%

Health – relative performance

The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Health Deprivation and Disability Domain measures the risk of premature death and the impairment of quality of life through poor physical or mental health.

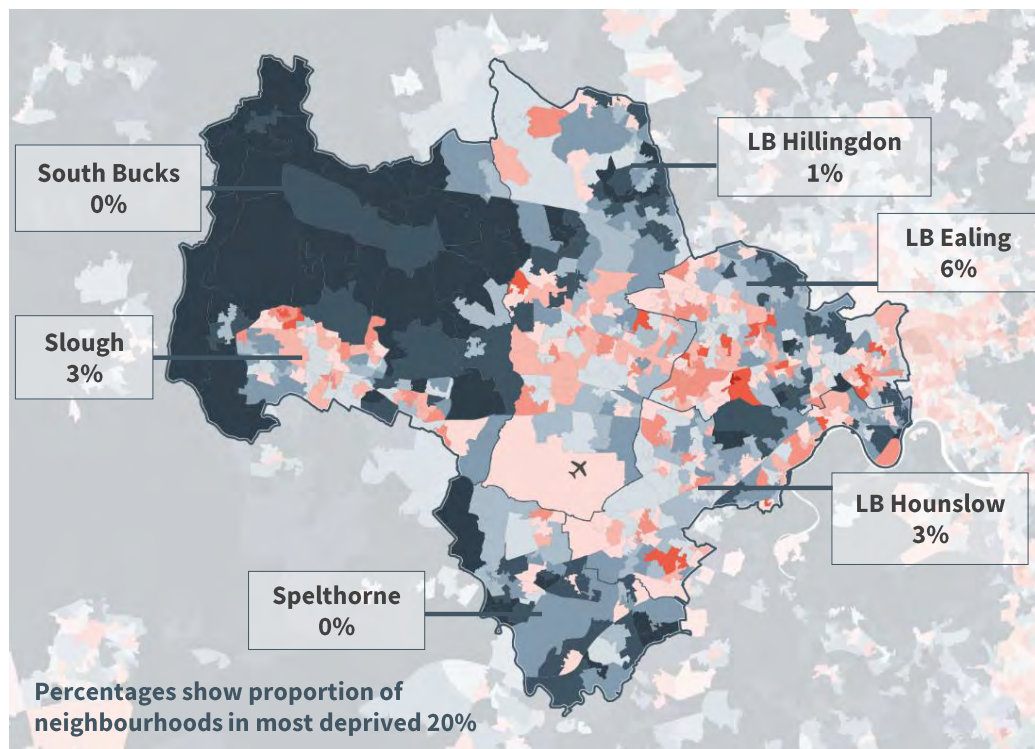
The HISA generally performs well in this Domain compared to the rest of England, though there is significant variability across the area.

Almost 90% of neighbourhoods in South Bucks are within the least deprived 30% of the country. In Spelthorne, the proportion of neighbourhoods 65%.

Like with most other Domains, Ealing, Hounslow and Slough are the weakest performing local authority areas. From an England-wide perspective, however, all three are still significantly under-represented in the highest quintile of health deprivation.

There appears to be some overlap between Health and Income deprivation in the HISA, with similar areas recording high and low levels of deprivation across both Domains.

IMD – Health Deprivation (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	7%	19%	33%	0%	3%
<i>Ealing</i>	2%	13%	23%	1%	6%
<i>Hillingdon</i>	4%	18%	33%	0%	1%
<i>Hounslow</i>	1%	9%	27%	0%	3%
<i>Slough</i>	3%	6%	20%	0%	3%
<i>South Bucks</i>	68%	85%	88%	0%	0%
<i>Spelthorne</i>	17%	42%	65%	0%	0%
England	10%	20%	30%	10%	20%

Air Pollution

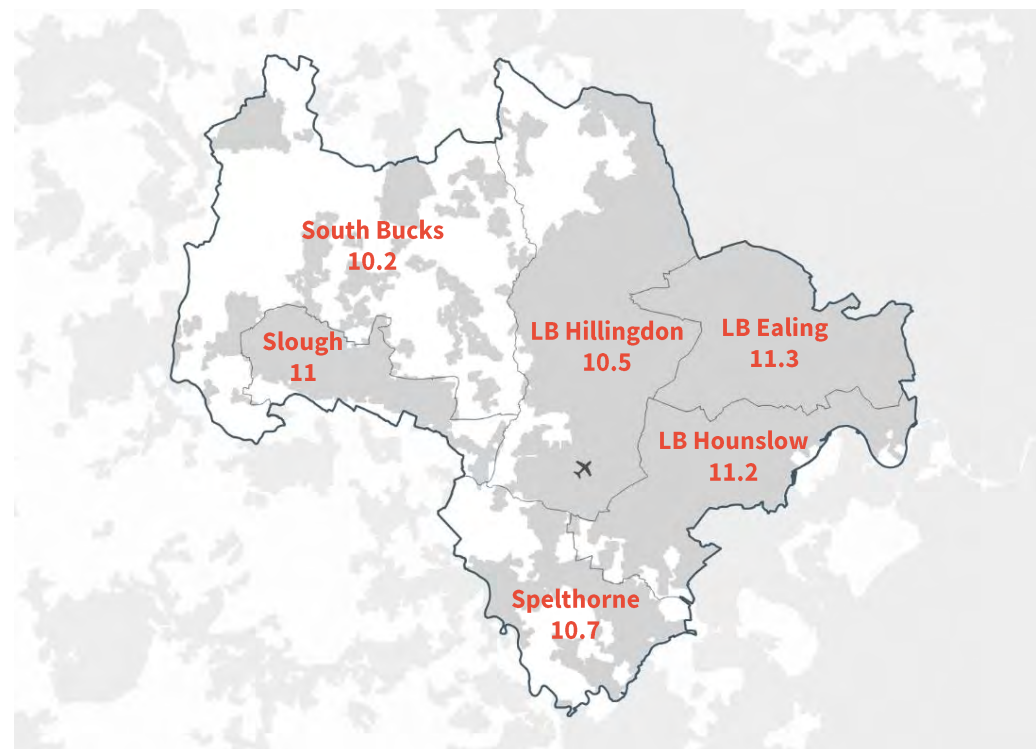
Public Health England also provides data on air pollution, including the concentration of fine particulate matter recorded in ambient air and the proportion of mortality attributable to particulate air pollution.

A 24-hour concentration of fine particulate matter is considered unhealthy when it rises above 35.4 $\mu\text{g}/\text{m}^3$. On a clear and non-hazy day the concentration of fine particulate matter can be as low as 5 $\mu\text{g}/\text{m}^3$.

Each of the HISA local authorities trail behind the average national air pollution levels. In England, the average of fine particulate matter stood at 9.3 $\mu\text{g}/\text{m}^3$, compared to 11.3 $\mu\text{g}/\text{m}^3$ in LB Ealing and 11 $\mu\text{g}/\text{m}^3$ in LB Hounslow.

Public Health England provides estimates on the proportion of mortality attributable to particulate air pollution. Here, **HISA has a higher level of deaths related to air pollution than the national average (5%)**. Here, the highest incidence is apparent in LB Ealing and LB Hounslow which stands at 6.5% and 6.4% respectively.

Air Pollution – Fine Particulate Matter (2018)



	Air Pollution: fine particulate matter ($\mu\text{g}/\text{m}^3$)	% of mortality attributable to particulate air pollution
Ealing	11.3	6.5%
Hillingdon	10.5	6.1%
Hounslow	11.2	6.4%
Slough	11.0	6.4%
South Bucks	10.2	6%
Spelthorne	10.7	6.1%
England	9.3	5.1%

Urban open space

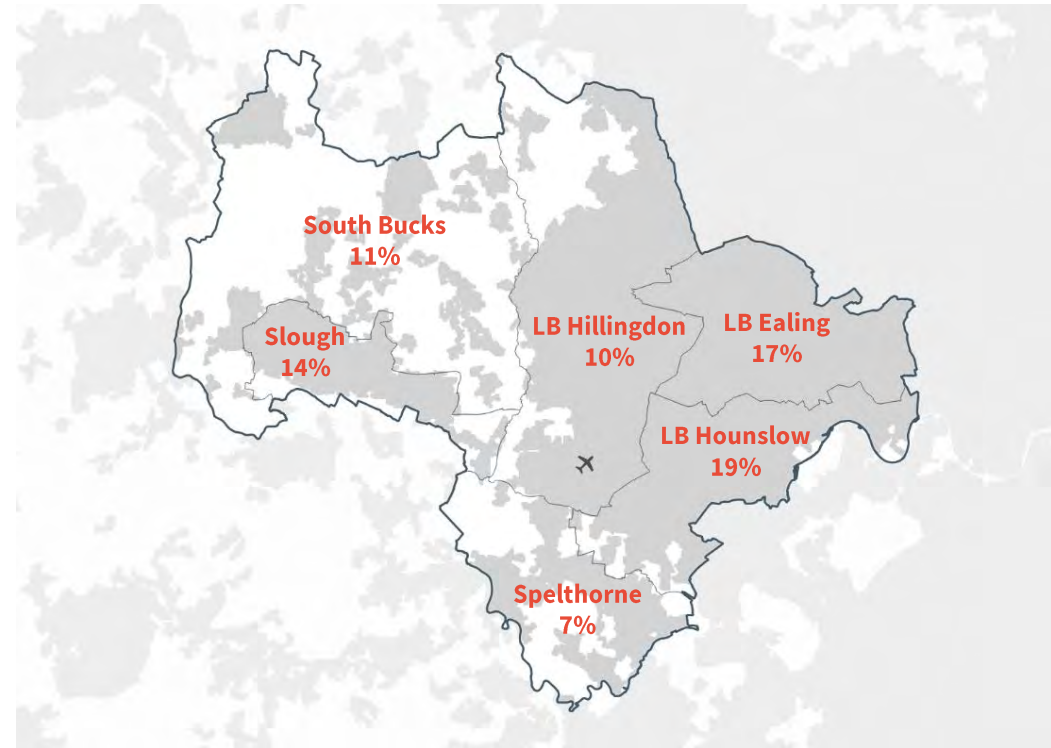
Urban open space refers to recreational and leisure features, including public parks and gardens, sporting grounds and fields, cemeteries and allotments. We have calculated urban open space coverage by calculating the area of urban open space as a proportion of all built up area in each local authority.

At 19%, the HISA overall (along with most of the LAs comprising it) has a lower coverage of urban open space than England as a whole (21%). Hillingdon has the lowest level of urban open space coverage at 14%. South Bucks, on the other hand, has more than double the national coverage, at 54%.

Utilisation of such space is relatively consistent across the HISA, though at 15% Hillingdon records the lowest level of utilisation. This indicates that not only is open space coverage lower in Hillingdon, but access to, or quality of, this space may also be compromised.

At 19%, utilisation of such space in the HISA is marginally higher than that of England (18%).

Open space as % of all urban area (2018)



	Utilisation of outdoor space for exercise/health reasons	Open space as % of all urban area
HISA	19%	19%
Ealing	19%	17%
Hillingdon	15%	14%
Hounslow	18%	22%
Slough	17%	19%
South Bucks	17%*	54%
Spelthorne	20%*	15%
England	18%	21%

Source: Public Health England, 2018. Ordnance Survey Green Space layer, 2019

*Note: County level figures are shown

Living Environment – relative performance

The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, with consideration for a number of different Domains. The Living Environment Deprivation Domain measures the quality of the local environment, including indoor living environment and quality of housing, air quality and traffic accidents involving pedestrians and cyclists.

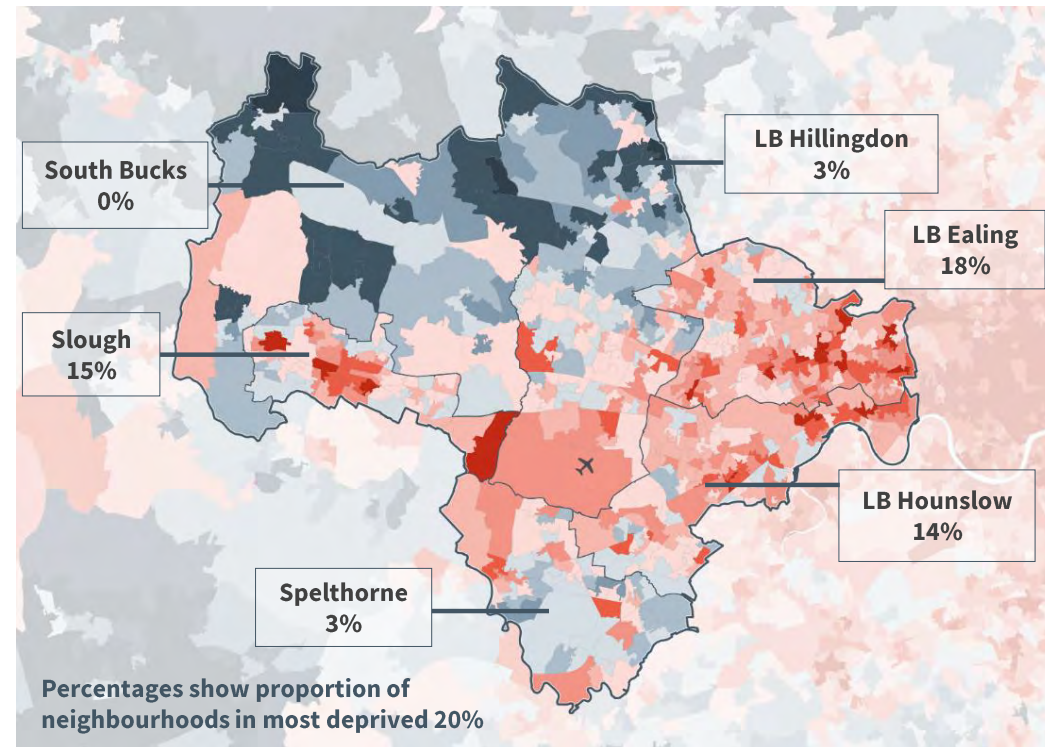
Overall, living environment deprivation in the HISA does not significantly outperform or underperform against other regions of England. It is not over-represented in the highest or lowest quintile for this Domain across the country. Quality of living environment worsens towards London

South Bucks is the only local authority to be over-represented in the highest performing deciles, with 55% of neighbourhoods in the top 30%. That said, no local authority in the HISA is over-represented in the top 10% of the country for this Domain.

Respectively, 18%, 15% and 14% of neighbourhoods in Ealing, Hounslow and Slough fall within the worst-performing quintile (bottom 20%) for living environment deprivation England.

The north-western and southern areas of the HISA study area, which perform well in the Living Environment Domain, also record low levels of deprivation in the Health Domain and Income Domain, suggesting a correlation between all three measures.

IMD – Living Environment Deprivation (2015)



Top = least deprived Bottom = most deprived	Neighbourhoods in the Top 10%	Neighbourhoods in the Top 20%	Neighbourhoods in the Top 30%	Neighbourhoods in the Bottom 10%	Neighbourhoods in the Bottom 20%
HISA	1%	5%	10%	2%	11%
<i>Ealing</i>	0%	0%	0%	5%	18%
<i>Hillingdon</i>	1%	11%	24%	0%	3%
<i>Hounslow</i>	0%	0%	0%	2%	14%
<i>Slough</i>	0%	0%	0%	5%	15%
<i>South Bucks</i>	5%	40%	55%	0%	0%
<i>Spelthorne</i>	0%	0%	7%	0%	3%
England	10%	20%	30%	10%	20%

Overall deprivation – relative performance

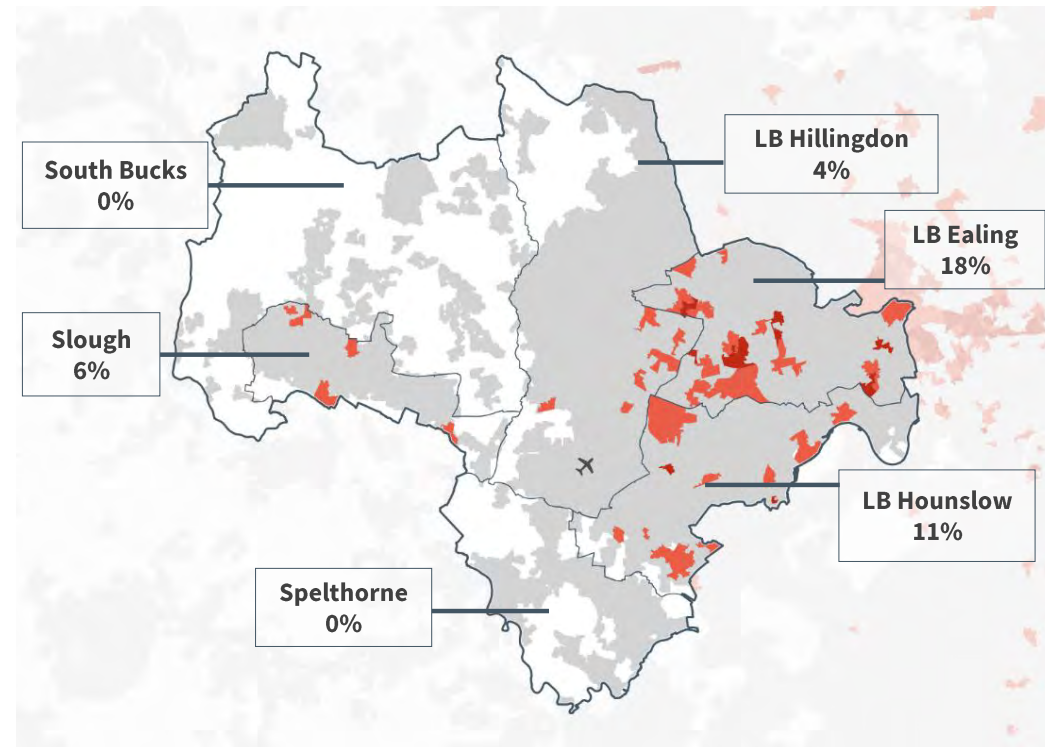
The Indices of Multiple Deprivation (IMD) ranks every small area in England from most (red) to least (blue) deprived, accounting for a number of different Domains, including health, housing, income and education.

In terms of overall IMD, only 9% of neighbourhoods in the HISA are in the **most** deprived quintile (bottom 20%) of England, indicating relatively lower overall levels of deprivation than the country as a whole.

At the same time, only 14% of neighbourhoods are in the **least** deprived quintile (top 20%), suggesting the HISA also does not have exceedingly low levels of deprivation.

Ealing and Hounslow are the worst performing local authorities, with 18% and 11% of neighbourhoods in the most deprived quintile of England respectively. Both still perform better than the country as a whole, though Ealing only marginally.

Neighbourhoods in Most Deprived 20% of England (2015)



	Proportion of neighbourhoods in the most deprived 20%	Proportion of neighbourhoods in the least deprived 20%
HISA	9%	14%
<i>Ealing</i>	18%	9%
<i>Hillingdon</i>	4%	21%
<i>Hounslow</i>	11%	1%
<i>Slough</i>	6%	1%
<i>South Bucks</i>	0%	50%
<i>Spelthorne</i>	0%	32%
England	20%	20%

Key findings

Key findings...People

1. The HISA has a larger young and working age population compared to England, though growth in these cohorts is slowing
2. Ealing has the highest level of overall deprivation in the HISA, with 18% of its neighbourhoods in the most deprived quintile of the country
3. Conversely, 50% of neighbourhoods in South Bucks are in the least deprived quintile of the country
4. The HISA population is very diverse, with a 43% BAME population and a strong Asian immigrant presence
5. Overall, the population is highly qualified, but there remain pockets of education deprivation
6. Managerial and professional occupations are overrepresented in the HISA
7. At 5.3%, the area has a higher unemployment rate than England overall (4.2%)

Key findings...Place

1. There are high levels of housing and access to service deprivation and risk of crime in the HISA
2. At the same time there is wide variability in housing affordability across the study area, with Slough particularly unaffordable relative to earnings.
3. Living environment is poorer in the London boroughs and of higher quality in the northern area of the HISA

Key findings...Well-being

1. Life expectancy levels are high in the HISA, and there is a lower incidence of long-term illness
2. Most LAs have lower obesity levels than the national average
3. There are higher rates of air pollution and related mortality in all HISA LAs compared to England
4. There appears to be a correlation between Income, Living Environment and Health in the HISA

Key implications

- + The HISA is complex, with significant geographical variation in performance across indicators. A nuanced approach will be necessary in future engagement processes and actions development.
- + While the HISA is currently well-qualified, with access to a large working age population, there are high unemployment levels and an overall ageing population. This has implications for both skills and training, healthcare and social service provision.
- + High levels of deprivation in the Housing, Access to Services, Crime Domains suggests that increased growth across the area must be accompanied by adequate and considered provision of supporting infrastructure and services. The needs of a diverse population must also be considered.
- + Air pollution is a key issue for consideration across the HISA.

Chapter 4

Travel, Transport & Digital Infrastructure

Highway Network

The area is well serviced by the Strategic Road Network, with access to the M4 east-west link and the M25 orbital. The area does have issues at certain pinch points, however.

The M25 south-west quadrant (to which Heathrow has direct access) experiences some of the highest volumes of traffic on the Strategic Road Network (SRN), with a two-way flow of around 200,000 vehicles per day.

There are congestion and capacity limitations at a number of junctions (e.g. M40/A404, M4/M25), an issue that is expected to continue to increase. The M25 is cited as the most problematic to join and exit because of traffic volume, congestion and traffic queueing.

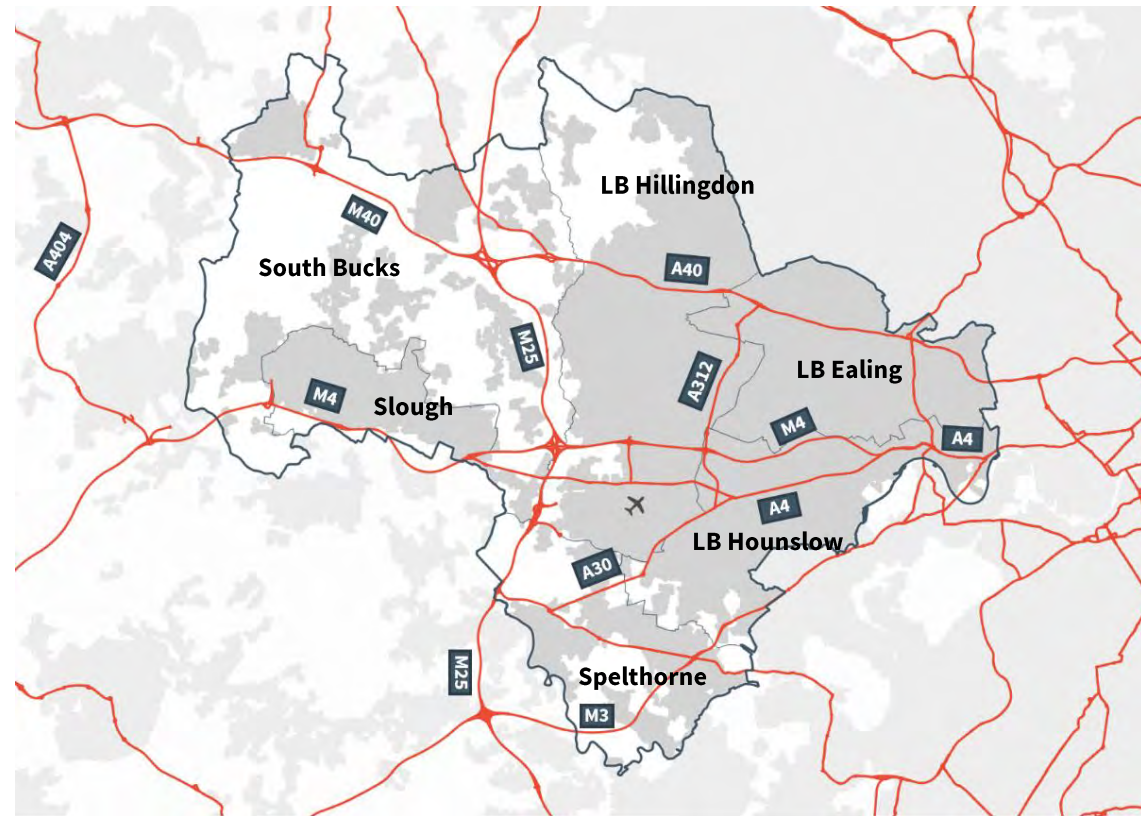
Noise pollution is a concern along key sections of the M4 and M25 within the study area. There are also issues regarding non-motorised road user crossing points on the M4 and A404 near London. The stretch of the M4 between the A404 and the M25 is one of the worst performing areas of the SRN nationally in terms of safety.

There are also concerns around HGV use of local roads near Heathrow which has a negative impact on villages.

An all lane running smart motorway scheme is currently being developed along the M4 corridor. Development aspirations along this route are likely to increase demand.

A new Major Road Network proposes new links between the SRN. Within the study area, this includes a direct connection from Uxbridge to Slough, which may ease congestion on the M25 and M4.

Highway Network



Indicative Traffic Flows (Annual Average Daily Flow)

	M25	M3/A316	M4	M40/A40	A4	A30
Ealing	-	-	-	102,132	-	-
Hillingdon	219,492	-	103,718	100,959	22,206	-
Hounslow	-	70,606	111,160	-	22,206	36,154
Slough	-	-	111,726	-	21,748	-
South Bucks	200,876	-	128,938	107,094	-	-
Spelthorne	205,769	55,566	-	-	-	30,053

Rail Network

While **Ealing and Hounslow are well-connected by Underground and Rail services, rail connectivity reduces further west of London.**

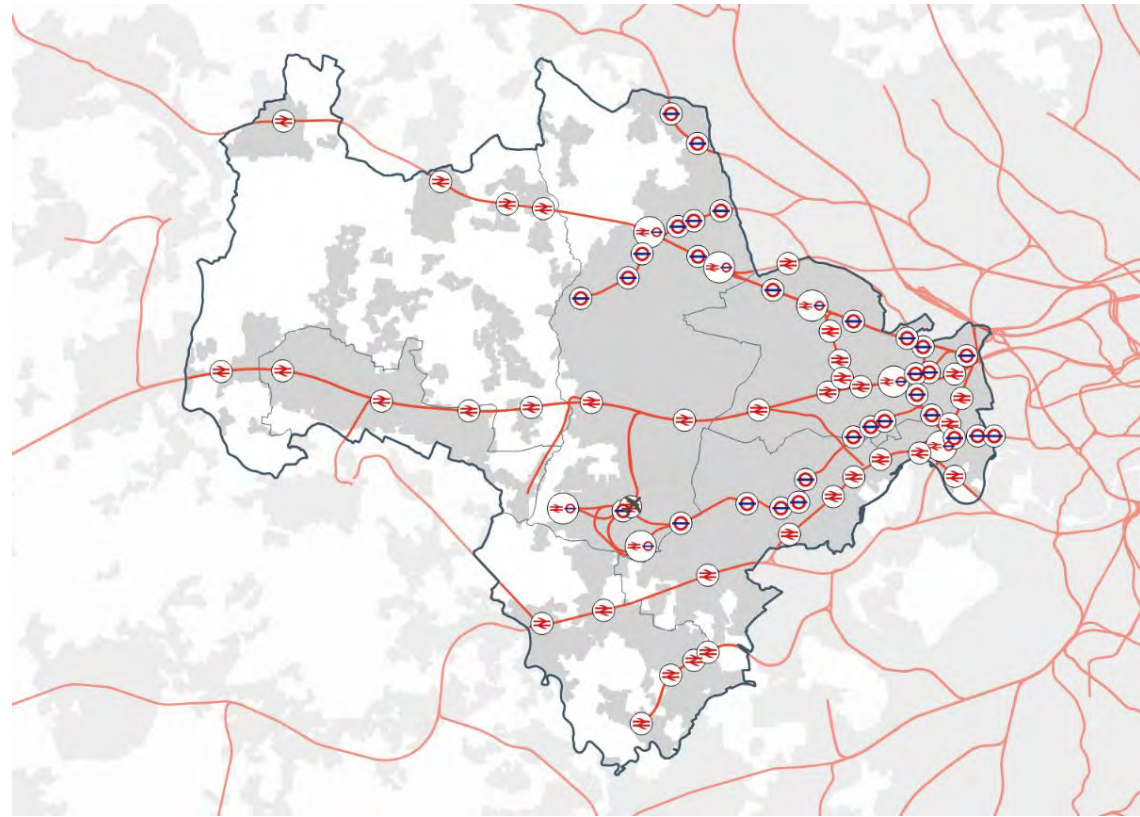
Ealing Broadway and Slough Railway Stations are the 80th and 88th busiest stations in Great Britain respectively. Passenger usage declined 2-3% at both stations from 2016/17 to 2017/18, however. This is reflective of declining usage across all 6 districts, which combined saw a 2% decline in passengers since the previous year.

Network Rail's Western route is the second-busiest route into London for the UK's rail freight industry.

There are a number of improvements that are committed and proposed in the region. These include:

- + The new Elizabeth line which will provide direct links from Reading, Maidenhead and Heathrow directly to the West End, the City of London and Canary Wharf (to be completed 2019).
- + The Western Rail Access to Heathrow (or the Heathrow rail link), a proposed direct rail link between the West of England and Heathrow.
- + The Southern Rail Access to Heathrow, a proposed rail link between the South of England and Heathrow. A range of options are under consideration.

Rail Network



Top 5 Busiest Rail Stations (Entry/Exit Counts) ('000s)

	Station 1	Station 2	Station 3	Station 4	Station 5
Ealing	Ealing B'dway (6,166)	Southall (2,657)	Acton Central (1,908)	West Ealing (1,035)	South Acton (820)
Hillingdon*	Hayes & Harl'n (3,805)	West Drayton (2,046)	South Ruislip (223)	West Ruislip (179)	-
Hounslow	Feltham (4,321)	Gunnersbury (2,526)	Brentford (1,768)	Isleworth (1,375)	Syon Lane (1,295)
Slough	Slough (5,544)	Burnham (1,260)	Langley (815)	-	-
South Bucks	Beaconsfield (1,626)	Gerrards Cross (1,487)	Denham (322)	Taplow (281)	Iver (227)
Spelthorne	Staines (2,753)	Ashford (1,033)	Sunbury (424)	Shepperton (419)	Upper Halliford (125)

Source: Office of Rail and Road, (2017/18). *Note: Figures for Heathrow Terminals not known

Active Travel Network

While **Ealing** has an extensive network of designated cycle routes, cyclists often need to use main traffic routes which are in need of safety upgrades. The council supports both walking and cycling in its Sustainable Modes of Travel Strategy (2013) and Draft Cycle Plan (2018).

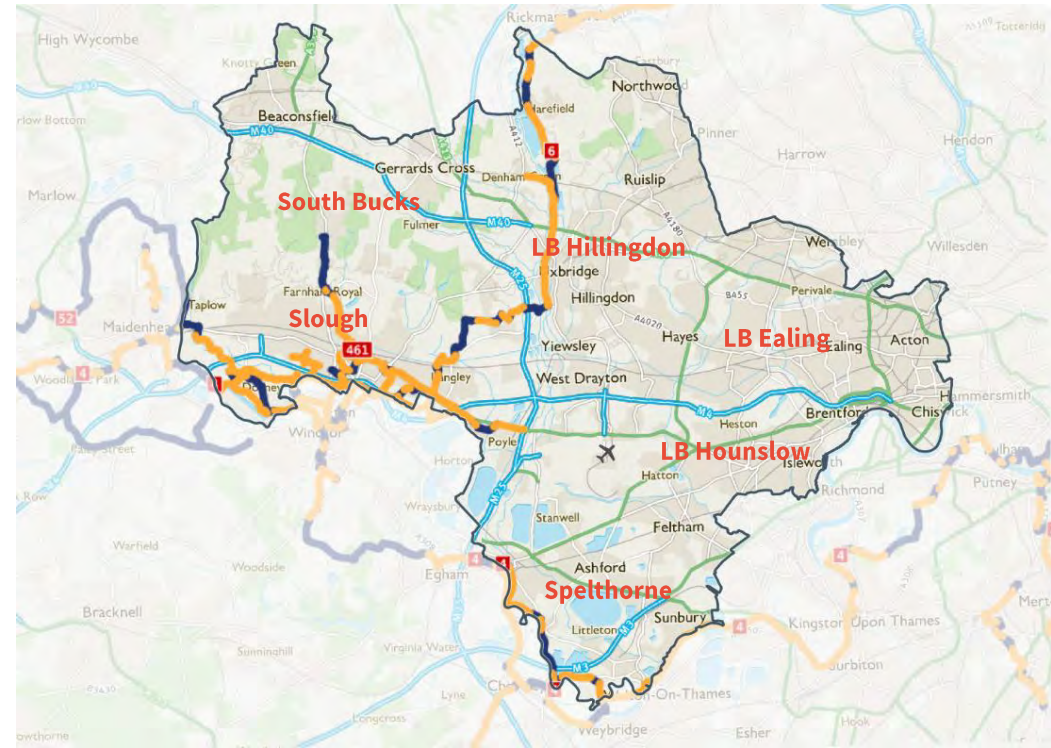
The **Hillingdon** Physical Activity Strategy (2012) aims to develop active travel plans for the area and see an increase in cycling and walking. The council has invested in more dedicated cycle and walking paths previously as part of its air quality improvement plans.

Hounslow has relatively high levels of cycling compared to other outer London boroughs. Significant improvements to cycling infrastructure has been made in recent years, and a Cycle Superhighway from Hounslow to Kensington using the A315 is in consultation phase (Hounslow Local Implementation Plan 2019). An electric bike hire trial was recently begun in Hounslow by WestTrans. Hounslow Travel Active is another initiative which promotes active travel and provides information on routes and training.

An aim of the **Slough** Third Local Transport Plan (2011) is to make walking and cycling more attractive by providing safer facilities and a more attractive environment. Road safety is a particular concern of pedestrians, cyclists and motor cyclists.

The **Spelthorne** Local Transport Strategy (2014) includes an aim to improve cycling connectivity within the borough, in particular between Staines-upon-Thames and Ashford. Spelthorne’s Cycling for Health Scheme is a free scheme which offers guided rides of around 7-12 miles during the week, delivered in partnership with Travel SMART.

National Cycle Network



	Proportion of Adults who walk or cycle (%)	Proportion of Adults who walk (%)	Proportion of Adults who cycle (%)
HISA	70.2	67.6	10.9
<i>Ealing</i>	73.5	69.4	11.4
<i>Hillingdon</i>	71.6	70.2	9.7
<i>Hounslow</i>	68.3	66.5	10.3
<i>Slough</i>	61.5	59.5	9.2
<i>South Bucks</i>	71.0	68.3	14.5
<i>Spelthorne</i>	70.9	67.8	14.2
England	71.8	69.4	11.9

Source: Department for Transport (2016/17), based on those who undertake the activity at least once per week. Ordnance Survey Maps, 2019.

Mode Share

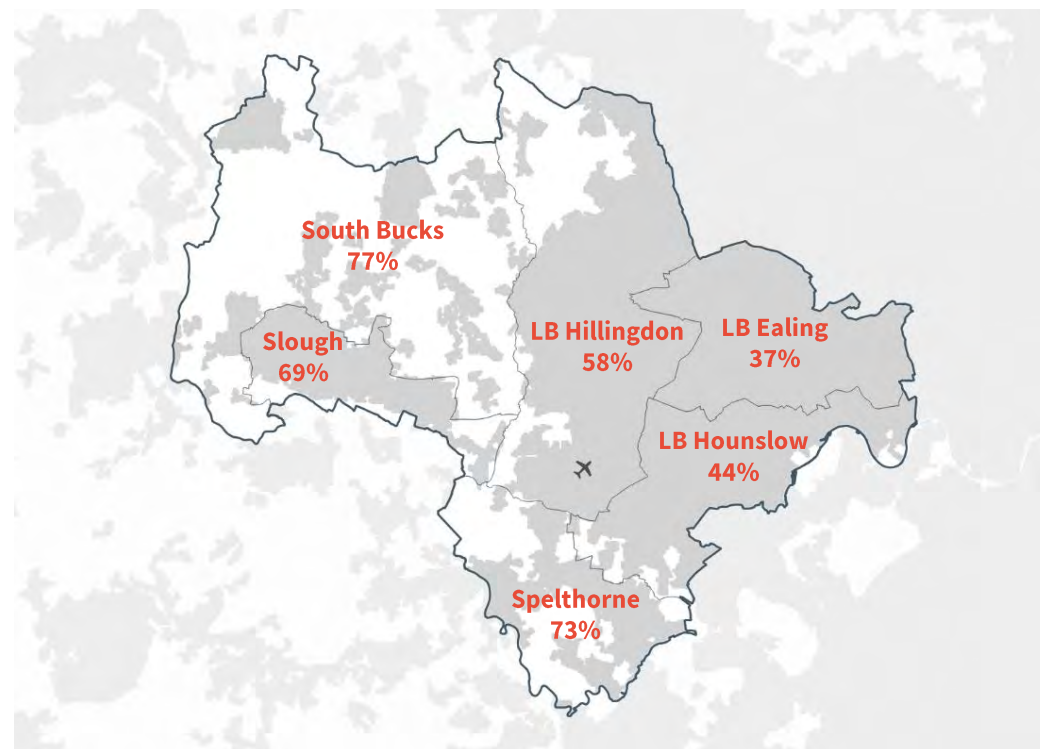
Varying levels of public transport accessibility across the HISA are reflected in journey to work mode share statistics.

The HISA's London boroughs, with the highest levels of public transport provision, including the tube, have high public transport mode share. Car mode share in these boroughs is lower than the England-wide average.

The remaining local authorities have higher levels of car use, with mode shares higher than the England average. At 72%, car mode share in South Bucks is much higher than the England average of 60%.

Cycling and walking rates are relatively similar across all the local authority areas, and comparable to England-wide levels. At 3%, Ealing, Hounslow and Spelthorne have the highest levels of cycling, and Slough the highest rate of walking, with a 10% mode share.

Car Mode Share (Journey to Work)



	Car (Driver)	Car (Passenger)	Rail	Tube or light rail	Bus	Bicycle	Walk	Other
HISA	49%	3%	7%	16%	12%	3%	8%	2%
<i>Ealing</i>	35%	2%	6%	29%	15%	3%	8%	2%
<i>Hillingdon</i>	55%	3%	5%	14%	13%	2%	7%	2%
<i>Hounslow</i>	42%	3%	9%	16%	17%	3%	8%	2%
<i>Slough</i>	63%	6%	7%	1%	8%	2%	10%	2%
<i>South Bucks</i>	72%	4%	9%	2%	2%	1%	7%	2%
<i>Spelthorne</i>	69%	4%	8%	1%	5%	3%	7%	2%
England	60%	5%	6%	4%	8%	3%	11%	2%

Commuting Patterns

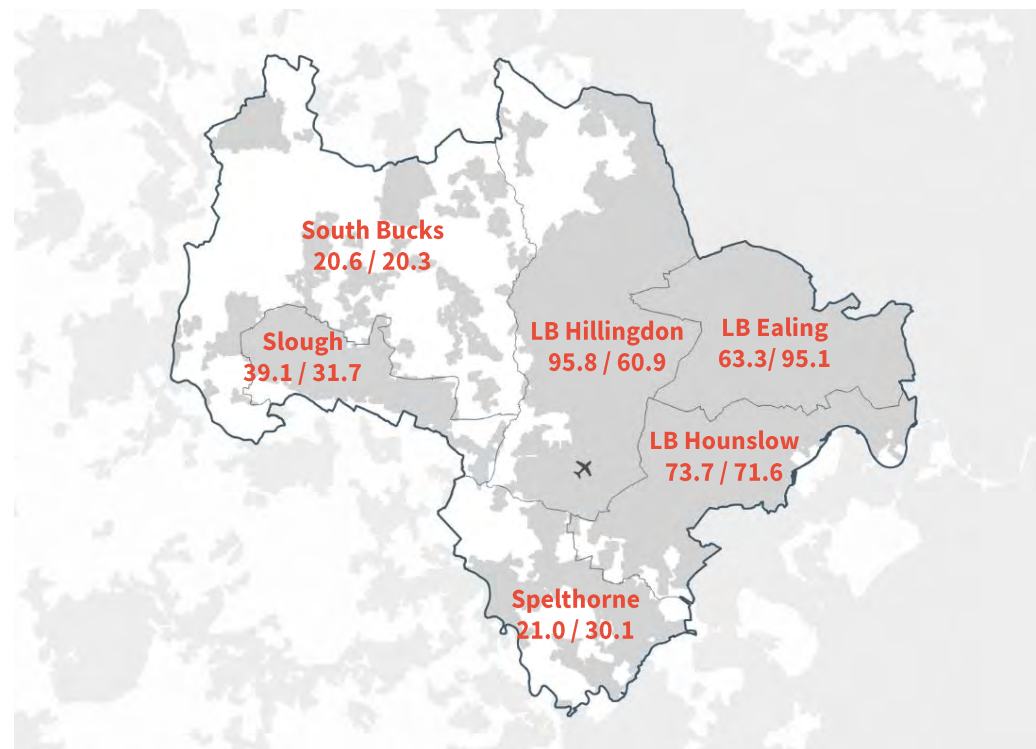
Of the approximately 465,000 people working in the HISA in 2011, 55% were HISA residents, while the remaining **45% commuted in from outside the HISA boundary.**

Ealing had the highest level of out-commuting, with over 70,000 residents commuting to the rest of England for work, 34,000 working within Ealing, and the remaining 25,000 commuting to another HISA local authority.

Hillingdon and Slough had the highest rates of in-LA resident employment. 46,000 people lived and worked in Hillingdon in 2011, compared to 61,000 travelling outside of the LA for work. 24,000 lived and worked in Slough, compared to 32,000 commuting outside of the LA.

Across the HISA, **63% of residents lived less than 10km from their place of work** (not including those working from home). 31% lived between 10 and 30km of work, and 5% more than 30km.

Of those who live less than 10km from their workplace, 52% drive. Public transport usage increases amongst those needing to travel between 10 and 30km. For those needing to travel over 30km, car/van travel again becomes more dominant. Other methods of travel to work are highest for those travelling relatively short distances.



	Public transport	Car/van	Other
Less than 10km (not including working from home)	27%	52%	21%
10km to 30km	52%	42%	6%
30km and over	35%	57%	8%

To / From	Ealing	Hillingdon	Hounslow	Slough	South Bucks	Spelthorne	Rest of England
Ealing	34,302	11,650	10,385	1,831	564	533	70,202
Hillingdon	9,560	45,948	6,251	3,046	2,046	841	39,203
Hounslow	6,732	11,954	31,030	2,172	327	3,447	46,944
Slough	1,200	5,458	2,148	24,062	3,486	542	18,882
South Bucks	894	3,478	678	3,618	4,819	234	11,464
Spelthorne	635	4,219	5,579	1,416	175	11,153	18,065
Rest of England	44,286	59,083	48,697	27,073	13,961	15,383	20.2 M

Connectivity Road

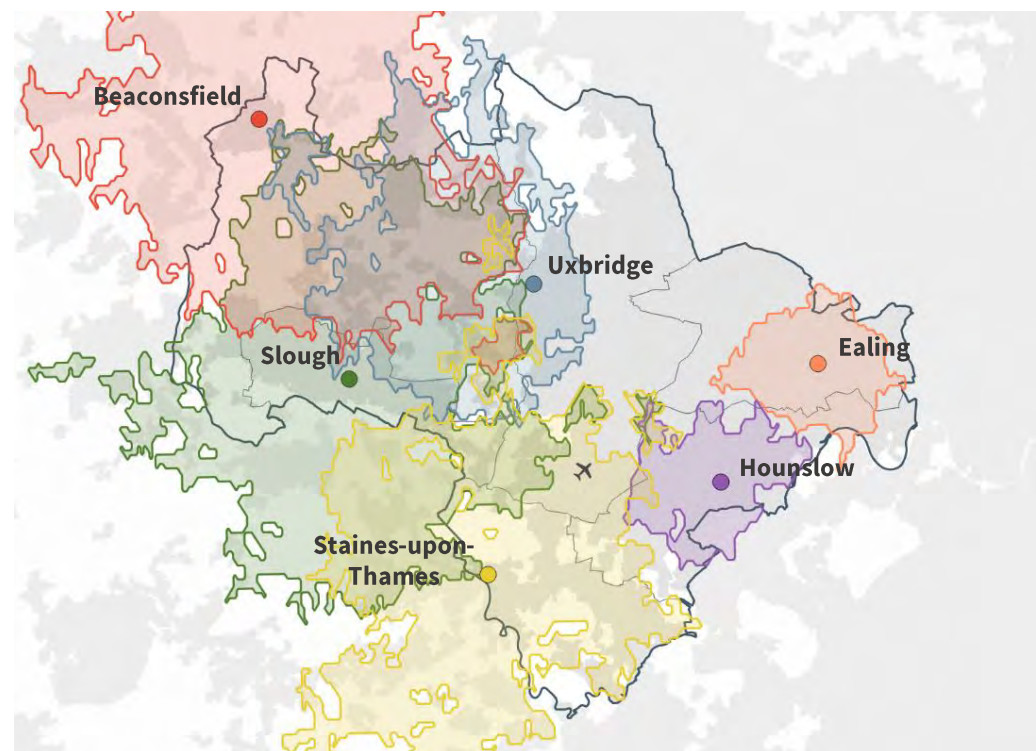
Travel catchment mapping provides insight into the functional geographies of areas and allows for estimations of accessibility to be garnered.

Road connectivity from the main town centres in the HISA is quite good, with large areas able to be accessed within 20 minutes.

Connectivity declines towards London, however, with an increase in journey times experienced towards the central city area. With higher population densities in these areas, however, the 20 minute population and employment catchments are still sizeable.

Slough has access to the largest population and employment catchments in the area. Over 265,000 people of working age can access the town centre within 20 minutes of driving. Over 320,000 jobs can also be accessed in the same time.

Connectivity (20 min Car Journey Time – AM Peak)



	Population	Working Age Population	Employment
Ealing (Ealing)	265,074	178,792	169,785
Uxbridge (Hillingdon)	247,372	158,675	200,265
Hounslow (Hounslow)	224,880	147,727	120,965
Slough (Slough)	413,255	265,564	320,495
Beaconsfield (South Bucks)	302,845	184,557	162,525
Staines-upon-Thames (Spelthorne)	386,587	250,441	275,755

Connectivity Public Transport

20 minute journey time **public transport connectivity is considerably lower than road connectivity in the HISA**, though comparable for the towns closer to London. This lower level of public transport connectivity presents a challenge in terms of reducing car dependency and increasing active travel.

The map to the right shows 40 minutes PT catchments. With their proximity to the high density labour and employment markets of London, the boroughs of Ealing, Hounslow and Uxbridge have access to significant employee and job catchments.

There are over 810,000 people of working age living within a 40 minute public transport commute of Ealing, and a further 1.5 million jobs that can be accessed within the same travel time.

Interestingly, Heathrow is only accessible from Ealing and Hounslow town centres within a 40 minute public transport catchment.

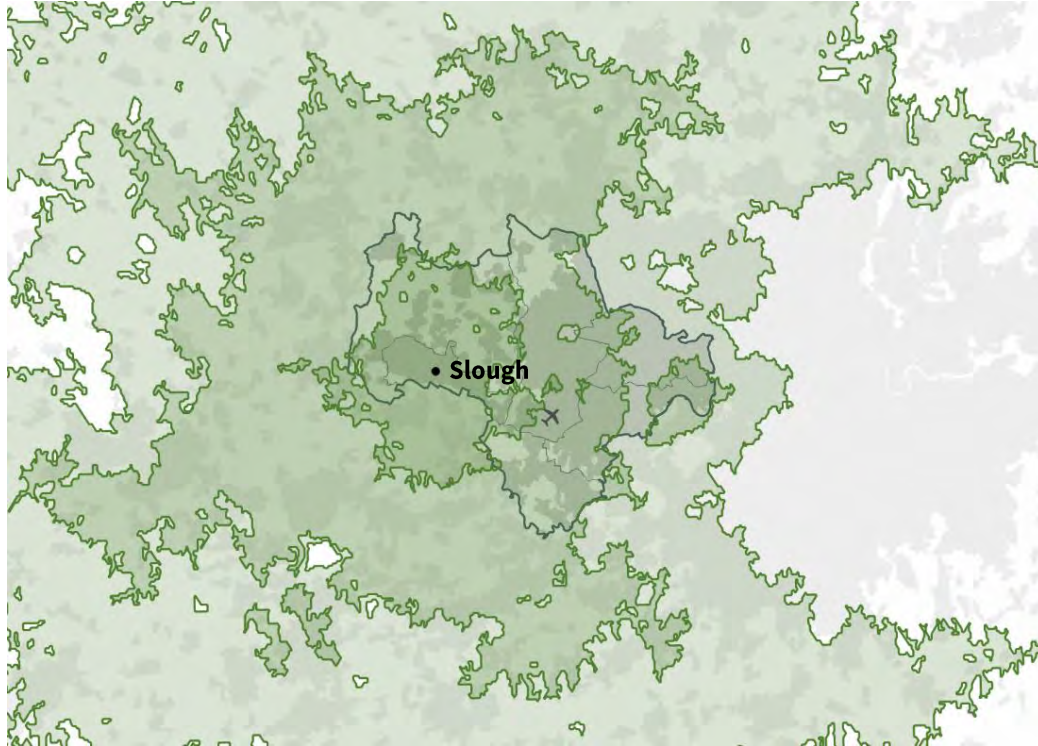
Connectivity (40 min PT Journey Time – AM Peak)



	Population	Working Age Population	Employment
Ealing (Ealing)	1,185,631	810,929	1,521,185
Uxbridge (Hillingdon)	548,281	355,087	272,440
Hounslow (Hounslow)	598,091	391,469	354,860
Slough (Slough)	305,855	195,787	225,530
Beaconsfield (South Bucks)	197,050	123,546	121,695
Staines-upon-Thames (Spelthorne)	307,265	198,787	244,960

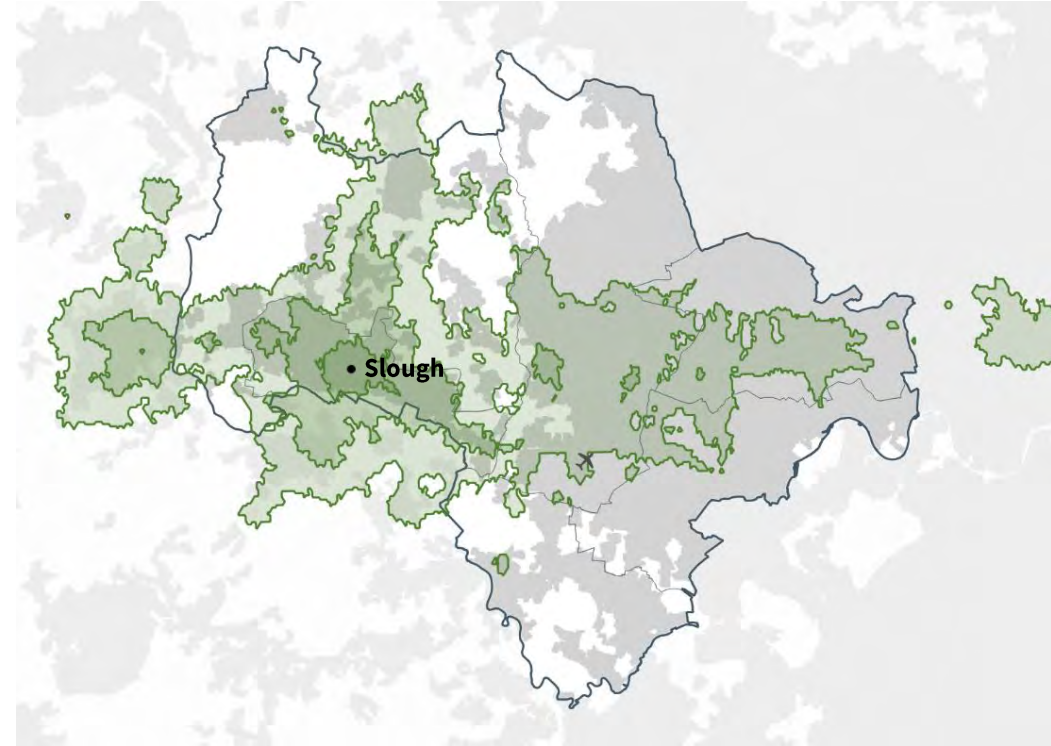
Connectivity Slough

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	413,255	265,564	320,495
40 minutes	2,926,942	1,848,767	1,639,655
60 minutes	7,490,559	4,780,120	4,022,150

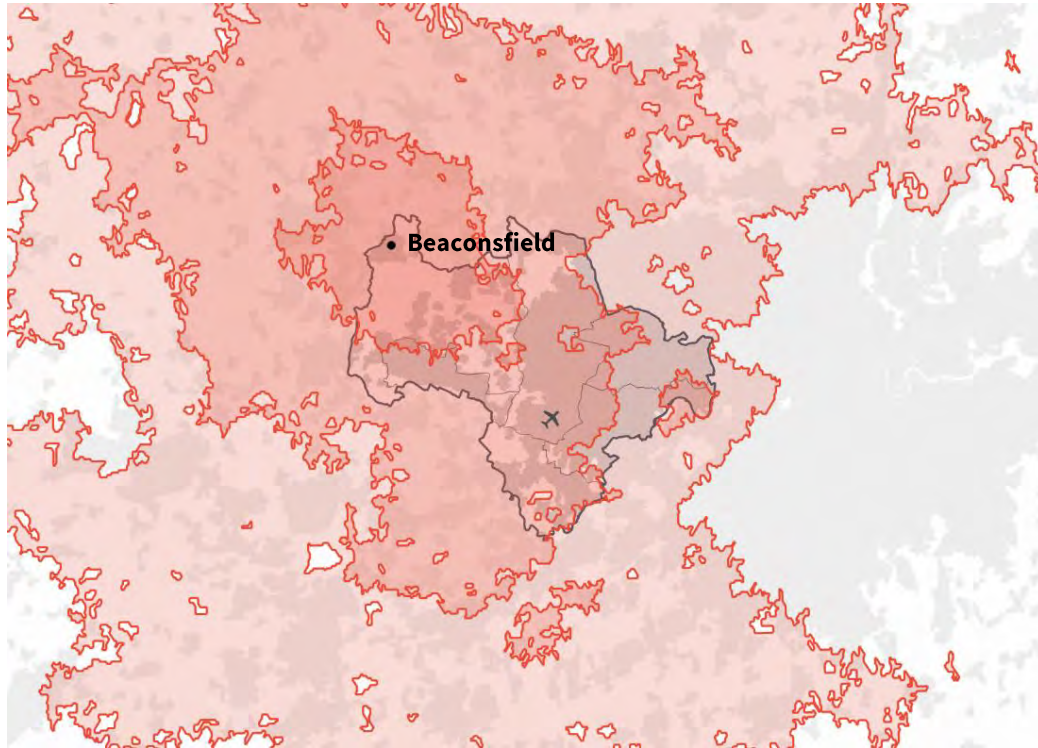
Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	69,008	44,776	46,175
40 minutes	305,855	195,787	225,530
60 minutes	1,259,372	836,409	1,456,270

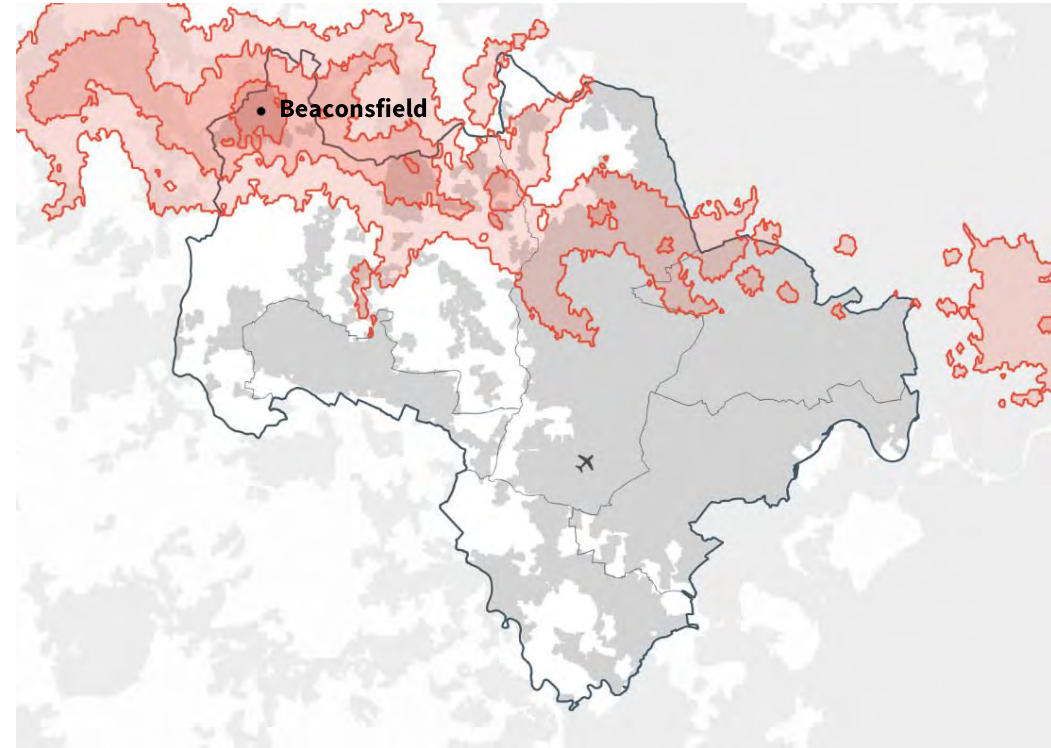
Connectivity Beaconsfield

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	302,845	184,557	162,525
40 minutes	2,297,607	1,445,241	1,240,870
60 minutes	7,122,088	4,546,897	3,687,410

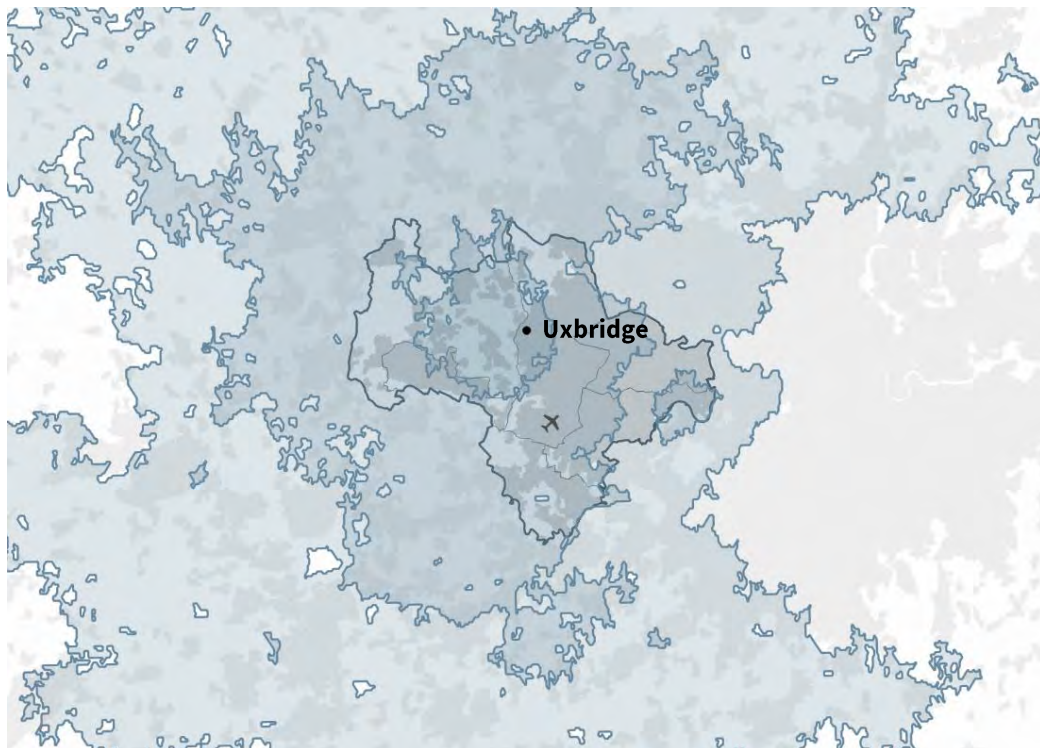
Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	25,786	14,551	13,775
40 minutes	197,050	123,546	121,695
60 minutes	1,487,557	1,025,222	2,670,940

Connectivity Uxbridge

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	247,372	158,675	200,265
40 minutes	2,495,416	1,576,814	1,366,610
60 minutes	7,332,984	4,680,362	3,754,795

Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	60,482	41,886	55,975
40 minutes	548,281	355,087	272,440
60 minutes	2,501,205	1,698,713	3,192,550

Connectivity Ealing

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	265,074	178,792	169,785
40 minutes	1,803,155	1,198,977	1,023,270
60 minutes	5,718,474	3,728,469	3,811,795

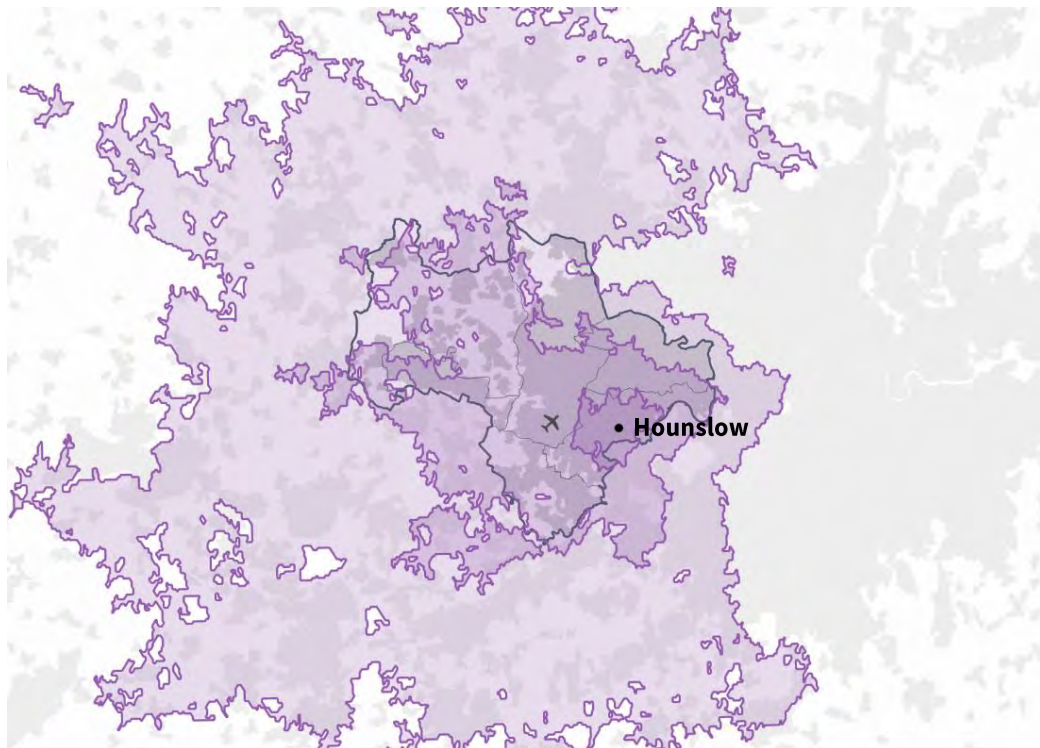
Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	141,172	95,026	57,095
40 minutes	1,185,631	810,929	1,521,185
60 minutes	4,617,046	3,223,803	4,226,910

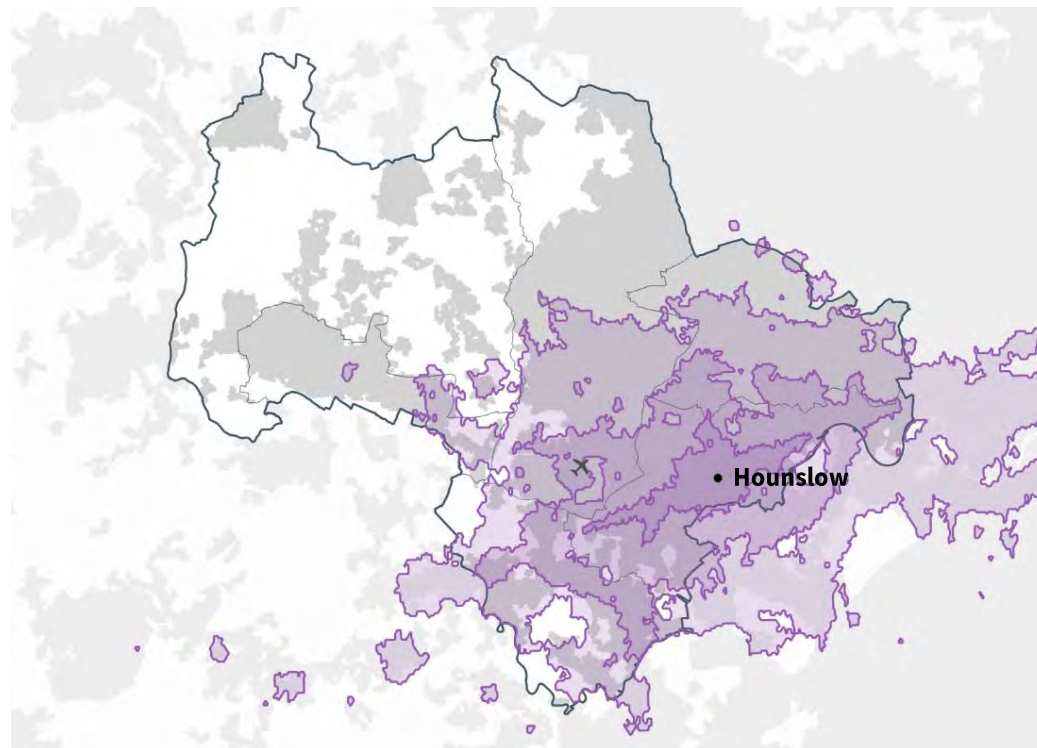
Connectivity Hounslow

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	224,880	147,727	120,965
40 minutes	1,588,471	1,022,434	885,740
60 minutes	4,924,817	3,157,575	2,728,760

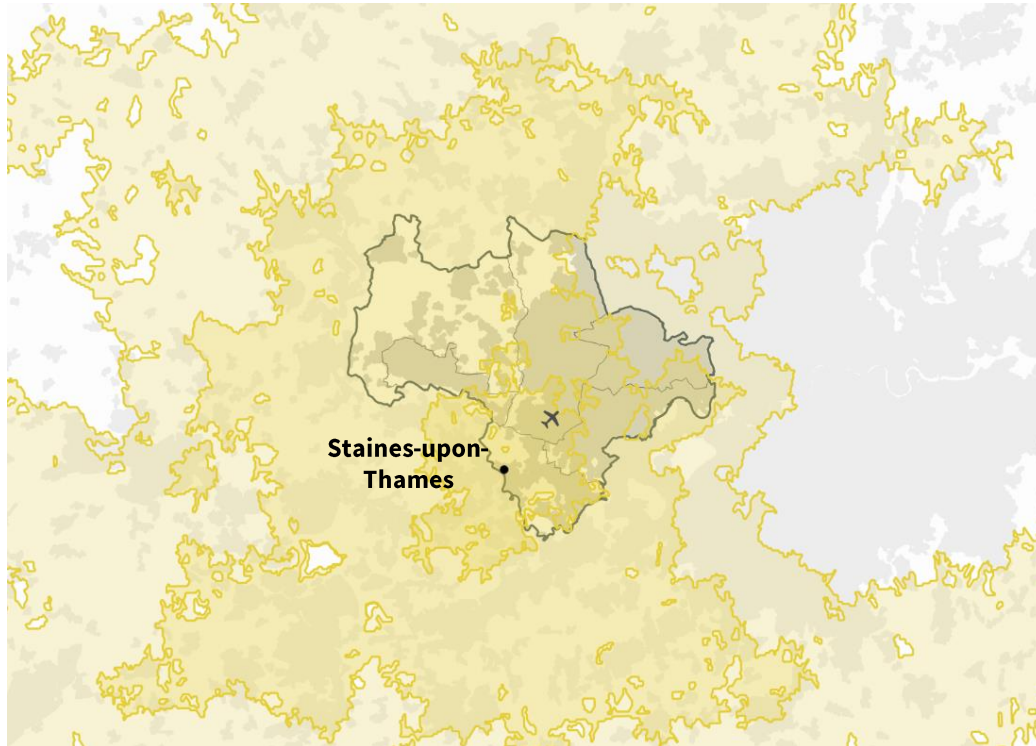
Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	172,569	114,068	103,310
40 minutes	598,091	391,469	354,860
60 minutes	1,979,436	1,344,457	2,189,105

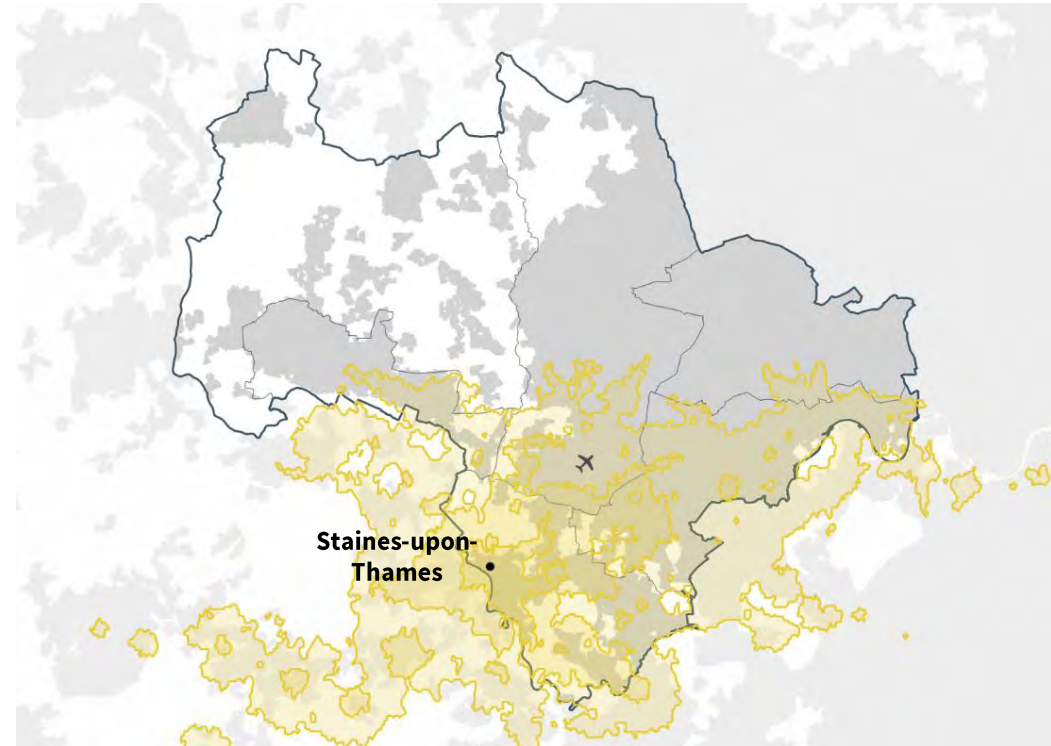
Connectivity Staines-upon-Thames

Connectivity Road (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	386,587	250,441	275,755
40 minutes	3,378,973	2,146,948	1,846,415
60 minutes	7,798,794	4,972,719	4,192,660

Connectivity Public Transport (AM Peak) (20, 40 & 60 mins)



	Population	Working Age Population	Employment
20 minutes	65,049	41,450	34,770
40 minutes	307,265	198,787	244,960
60 minutes	1,116,545	732,800	693,520

Digital Connectivity - Fixed Coverage

Generally, the data presents a **positive picture of fixed digital infrastructure connectivity across the HEBC area**, with strong levels of superfast and ultrafast broadband penetration evident (each being a key measure of broadband performance and digital competitiveness). This is reflected in total fibre coverage of 97% across the HEBCB.

That said, there is **considerable variation in broadband connectivity across the HISA**, with the more urbanised local authorities having a greater presence of higher capacity, ultrafast broadband. In these locations, upgrades and extensions will be driven by commercial investment, whilst public sector programmes will be targeting more rural locales and communities.

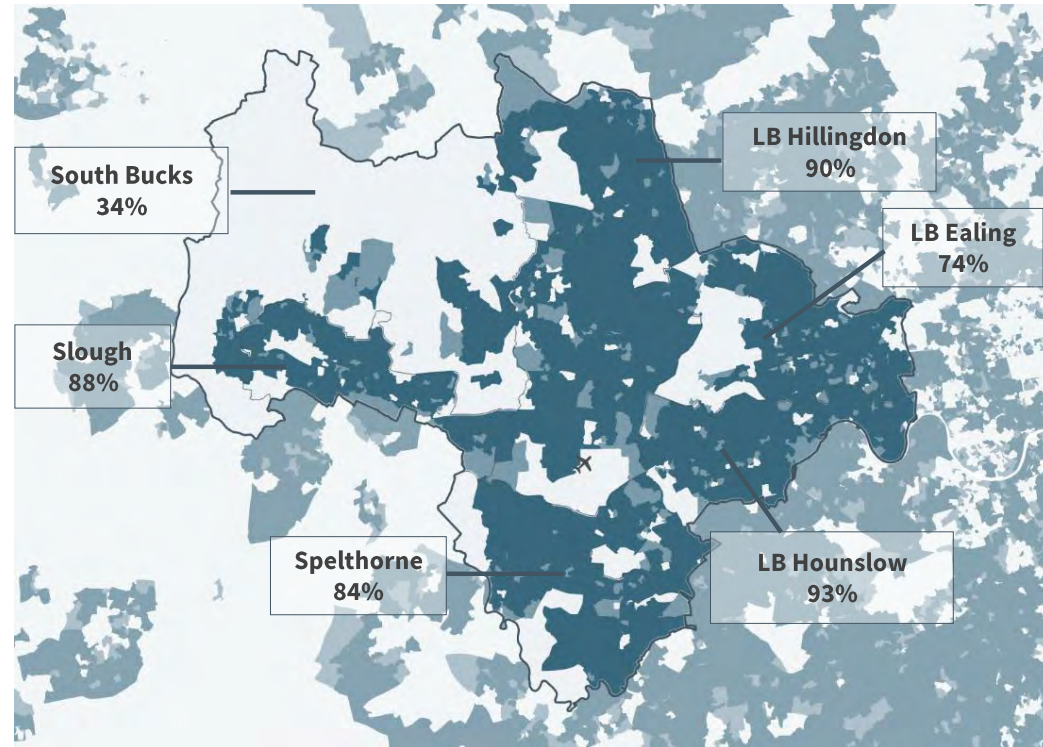
On the whole HISA has greater UFBB coverage than that seen nationally, with **Slough and Spelthorne performing particularly strongly**, despite not being within the Greater London boundary.

Whilst South Bucks is lagging behind other local authorities in UFBB terms, the **strong presence of SFBB is a positive outcome for homes and businesses** in the area and provides an upgrade path to full fibre technologies.

The figures should also be considered in actual terms. The **total number of premises without superfast and ultrafast access is likely to be significant** and some areas will be receiving particularly poor speeds.

Coverage mapping also helps to illustrate the presence of ‘not spots’ in urban areas. These may disproportionately affects businesses and mean the **digital divide in such locations, is even more exaggerated**.

Premises with access to Ultrafast Broadband



	Superfast Broadband (SFBB) (30-300 Mbps)	Ultrafast Broadband (UFBB) (>300Mbps)
HISA	18%	79%
<i>Ealing</i>	25%	74%
<i>Hillingdon</i>	7%	90%
<i>Hounslow</i>	6%	93%
<i>Slough</i>	11%	88%
<i>South Bucks</i>	58%	34%
<i>Spelthorne</i>	15%	84%
England	36%	60%

Source: OfCom, 2019; ThinkBroadband, 2019
 Note: A glossary of digital terms is provided in the Appendix of this report.

Digital Connectivity - Fixed Technology

Total fibre coverage provides a holistic view of access to fibre-based broadband across the HECB area.

Levels are **on par with the highest performing areas across the country** and are reflective of the tight density of settlements and population. This fibre presence provides a natural upgrade path from which higher capacity fixed and mobile connections can be established. This is also a **clear measure of relative competitiveness**.

The presence of fibre to the premises (FTTP), is **far less extensive and somewhat disappointing**, despite being broadly in line with the national average. **Spelthorne clearly stands out however**, with FTTP coverage (30%) more than three times that of England and ten times greater than Slough. The mapping of coverage **paints a stark picture in terms of the dispersion of areas with poor FTTP penetration**.

The future deployment of FTTP is subject to **ambitious public investment programmes and the dynamics of an increasingly active commercial marketplace**. Investments through local authority projects (such as Superfast Surrey, Superfast Berkshire and Connecting Counties) are actively influencing coverage levels too.

The government is further incentivising rollouts as part of its **Gigabit Voucher Scheme, Local Full Fibre Networks and Rural Gigabit Connectivity programmes** (driven by Building Digital UK (BDUK)). Policy and regulatory incentives are also key.

There is a prime opportunity to further influence FTTP connectivity **through the deployment of these technologies in new developments, where the commercial imperative is strong**. Without this, there is a danger that new homes and commercial properties are digitally disadvantaged.

Premises with access to FTTP



	Total Fibre Coverage	Fibre to the Premises (FTTP)
HISA	97%	9%
Ealing	99%	6%
Hillingdon	97%	3%
Hounslow	99%	8%
Slough	99%	3%
South Bucks	91%	4%
Spelthorne	99%	30%
England	96%	8%

Digital Connectivity - Mobile Coverage

Mobile connectivity is an increasingly important part of the digital connectivity mix, as the conduit for seamless voice, data and internet services. It can offer comparable speeds to fixed broadband infrastructure and is increasingly reliant on the presence of fibre – evidence of technological convergence.

As the most common form of connection and capable of delivering superfast speeds, 4G coverage is delivered by four main providers – EE, O2, 3 and Vodafone.

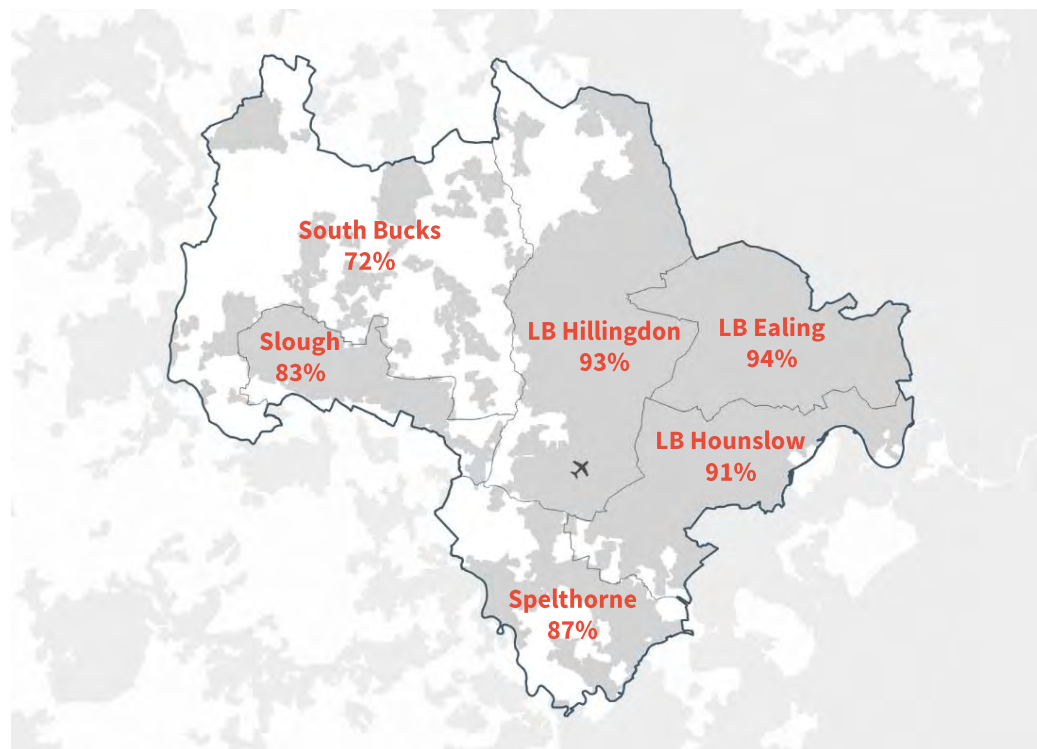
Observing 4G outdoor access, coverage is comprehensive, with 100% of premises able to access these services across the HECB area. This is well in excess of the England average (+13%).

Indoor 4G coverage, however, is less positive and offers a more suitable proxy for mobile coverage. Whilst this is less comprehensive across the HISA, it is still notably higher than the England average. This variation largely mirrors fixed broadband coverage, with more rural areas exhibiting the poorest coverage levels (i.e. South Bucks). The same logic also applies to the scale of the challenge, with the actual number of affected premises likely to be significant.

There are a number of opportunities to enhance 4G coverage, which importantly, will provide a pathway for the deployment of 5G. This includes commercial attention on 4G infill, government stimulus through policy, technical trials and the conditions of Ofcom’s spectrum licences.

Public sector bodies also have a role to play in supporting the rollout of 4G/5G, through progressive planning policy, the use of local assets and investment in supporting infrastructure (such as FTTP).

4G Indoor Coverage, 2018



	4G Outdoor	4G Indoor
HISA	100%	87%
<i>Ealing</i>	100%	94%
<i>Hillingdon</i>	100%	93%
<i>Hounslow</i>	100%	91%
<i>Slough</i>	100%	83%
<i>South Bucks</i>	100%	72%
<i>Spelthorne</i>	100%	87%
England	83%*	80%

Source: OfCom, 2019. *Note: This figure is based on % geographic area covered rather than premises

Key findings

Key findings...Highways

1. The HISA is well serviced by the Strategic Road Network, with access to the M4 east-west link and the M25 orbital
2. Congestion and overcapacity is an issue, particularly at key intersections, and this is likely to increase with future growth in the area
3. Noise pollution is a concern along key sections of the road network within the study area, as well as non-motorised road user crossing points
4. A new Major Road Network proposes new links between the SRN, which may ease congestion on the M25 and M4.

Key findings...Public Transport

1. Public transport connectivity is greater in the London boroughs, particularly with access to the tube.
2. Public transport connectivity is much lower than road connectivity, with smaller labour market and employment catchments
3. The new Elizabeth line will improve connectivity from Heathrow to central London

Key findings...Active Travel

1. Many of the local authorities either aim to increase levels of active travel or have schemes already in place to do so
2. There are safety and amenity blackspots across the road network for cyclists and pedestrians
3. Car mode share is higher than the England average in the non-London LAs of the study area

Key findings...Digital Connectivity

1. Geographical variation across LAs, with those furthest from London underperforming
2. Consideration of performance across indicators is also necessary to avoid outperformance in only one indicator e.g. Spelthorne.

Key implications

- + There are a number of 'pinch points' for road congestion and overcapacity across the HISA, particularly along the M25, M4 and A404. While there are various infrastructure upgrade programmes in place to alleviate these issues, congestion is likely to continue to increase with ongoing population growth.
- + There is a high level of car dependency in the HISA, particularly outside of the London Boroughs. While most of the HISA LAs have aspirations to increase sustainable and active travel, the relative dominance of cars in the area is likely to be an ongoing issue.
- + A need for improved cycling and pedestrian infrastructure has also been identified.
- + There is significant variation in quality of digital infrastructure and connectivity across the HISA. This will be an important consideration in future-proofing and facilitating growth in the area.

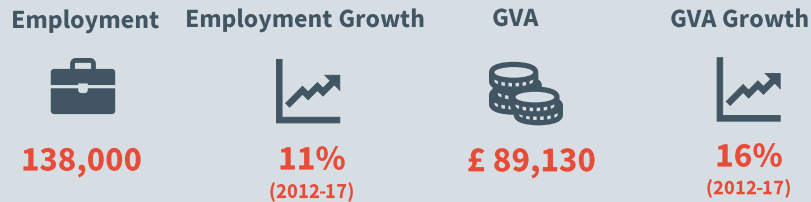
Chapter 5

Area Profiles

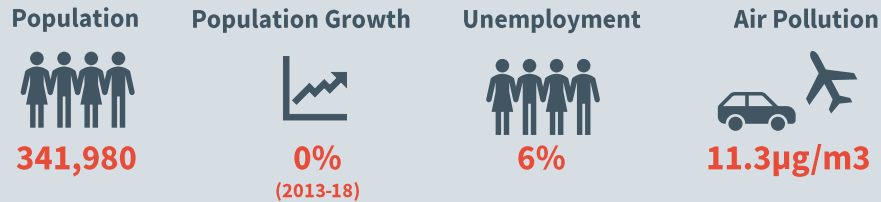
London Borough of Ealing

Key Statistics

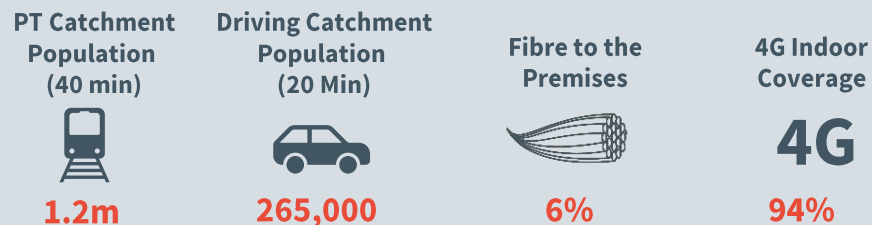
Business and Employment



People, Place and Well-being



Travel, Transport & Digital Infrastructure



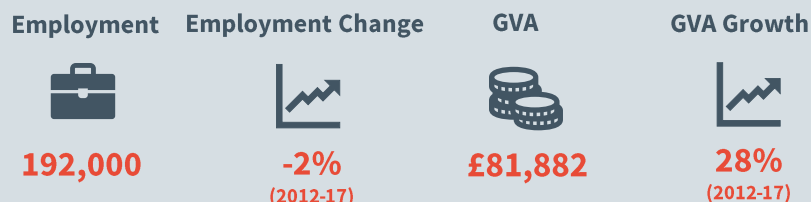
Key Findings

- Ealing has had a **higher rate of employment (11%) and business (33%) growth** than England over the last five years
- Ealing **contributes the highest overall GVA** (£13.2M) of all the LAs in the HISA, and the second highest GVA per FTE (£89,000)
- Employment and business growth in the Construction sector has been higher** in Ealing than any other HISA LA.
- At 66%, Ealing has a **larger working age population** than all but one other LA in the HISA. However, this cohort is declining.
- 46% of neighbourhoods in Ealing are in the **most deprived quintile of the country for Housing and Access to Services**. It is the **most deprived in the Income Domain**.
- Risk of crime is relatively high** in Ealing.
- Ealing is **one of the more ethnically diverse LAs** in the HISA, with more than half the population from BAME backgrounds.
- Ealing residents are **highly qualified**, with 54% of the population NVQ4+ qualified compared to 40% across England.
- Ealing has a **very high unemployment rate** of 6.1%.
- The median earnings of those who live in Ealing are higher than those who work in the Borough.
- Ealing has the **highest level of air pollution of all the HISA LAs** and the **highest incidence of related mortality**.
- Ealing is **well served by public transport**, particularly in terms of access to wider London, but **the road network provides access to a larger catchment area**.
- Ealing has **74% Ultrafast and 25% Superfast Broadband coverage**.

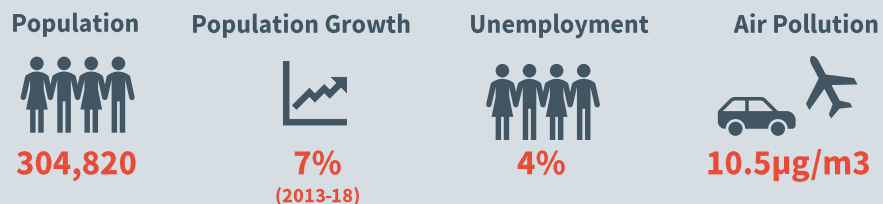
London Borough of Hillingdon

Key Statistics

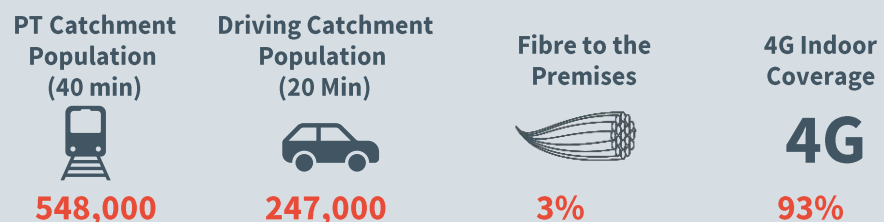
Business and Employment



People, Place and Well-being



Travel, Transport & Digital Infrastructure



Key Findings

- Hillingdon is the **HISA's biggest employer**, with 192,000 jobs.
- Hillingdon is the only LA in HISA to have **experienced decline in employment in the last five years** (-2%). On the other hand, it had the **second highest rate of business growth** (33%).
- Hillingdon has **105 large businesses**. At 0.7% of all businesses in the Borough, this is a high proportion than England overall.
- Hillingdon makes the **second highest GVA contribution** in the HISA overall, but the **lowest per capita GVA contribution**. It has experienced the highest level of GVA growth in the last 5 years (28%).
- The **Creative sector is the fastest growing sector** in Hillingdon in terms of employment.
- Hillingdon has the **lowest unemployment rate** of all the HISA LAs, at 3.8%.
- Hillingdon is **expected to see the most population growth** of all the HISA LAs in the next 5-20 years.
- Hillingdon has the **lowest median resident earnings** of the HISA and the second lowest median worker earnings.
- Hillingdon has both the **lowest coverage of urban open space** in the HISA, but also the **lowest utilisation of such space**.
- The **road network provides much greater connectivity** to Uxbridge than the public transport network, **with the exception of some areas of central London**.
- Hillingdon has **90% Ultrafast and 7% Superfast broadband coverage**.

London Borough of Hounslow

Key Statistics

Business and Employment

Employment



164,000

Employment Growth



16%
(2012-17)

GVA



£87,199

GVA Growth



22%
(2012-17)

People, Place and Well-being

Population



270,780

Population Growth



4%
(2013-18)

Unemployment



7%

Air Pollution



11.2µg/m3

Travel, Transport & Digital Infrastructure

PT Catchment
Population
(40 min)



598,000

Driving Catchment
Population
(20 Min)



224,900

Fibre to the
Premises



8%

4G Indoor
Coverage

4G

91%

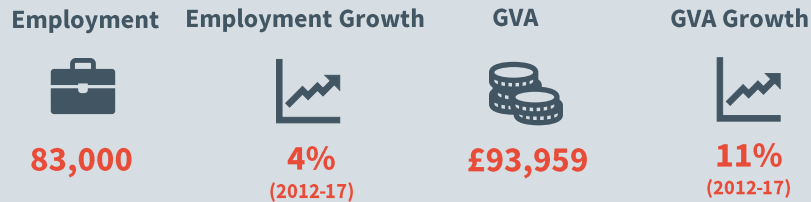
Key Findings

- Hounslow had the **highest rate of employment growth in the HISA** (16%) in the last five years.
- Hounslow makes a **higher GVA per FTE contribution than England overall.**
- The **Transport sector is the largest employer** in Hounslow, with 15% of all employment in the LA attributable to this sector. There is a **very strong Transport specialism** in Hounslow, with the sector being 7 times more specialised than England for employment. There is a **strong business specialism in ICT & Digital.**
- Hounslow has a **very high unemployment rate** of 6.7%.
- Hounslow has the **highest median worker earnings** in the HISA, at £36,100.
- Hounslow's **over 65 year old population has grown by 14%** in recent years, at a rate higher than England's (9%).
- Hounslow has the **highest proportion of social rented stock** in the HISA, at 22%.
- **Housing and Access to Services deprivation is extremely high in Hounslow**, with three quarters of neighbourhoods in the LA in the most deprived quintile of England.
- The **road network provides much greater connectivity** to Hounslow town centre than the public transport network, **with the exception of some areas of central London.**
- Hounslow has **93% ultrafast and 6% superfast broadband coverage.**

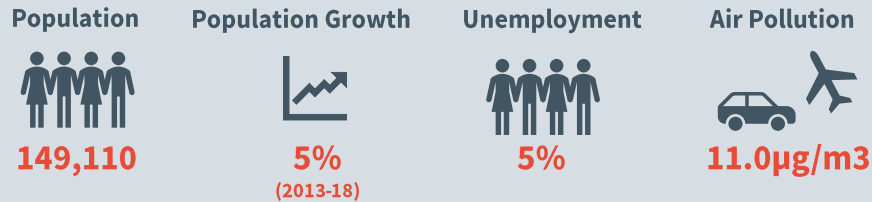
Slough

Key Statistics

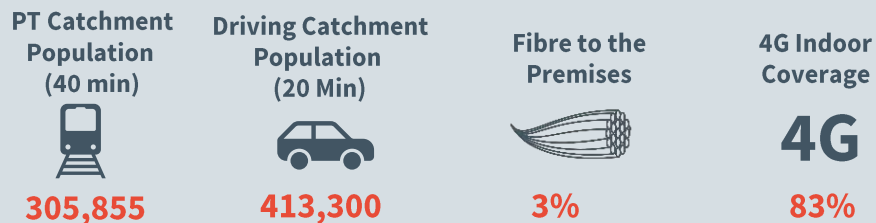
Business and Employment



People, Place and Well-being



Travel, Transport & Digital Infrastructure



Key Findings

- Slough has the **highest GVA per FTE contribution** in the HISA.
- **ICT & Digital is a core sector**, with 18% of all businesses in this sector.
- Slough has a strong **Warehousing & Logistics specialism** in its employment and **ICT & Digital business specialism**.
- Slough has the **largest under 15s population** of the HISA, at 26%.
- Slough is the **most ethnically diverse LA** in the HISA, with over half the population from BAME backgrounds.
- Slough has the **highest risk of crime of all the LAs** in the HISA, with almost half (49%) of neighbourhoods in the most deprived quintile of the country for this Domain.
- 35% of neighbourhoods in Slough are **in the most deprived quintile of the country for the Housing and Access to Services Domain**.
- At 11%, the level of **fuel poverty is highest in Slough** compared to the other HISA LAs, but on par with the England average.
- **67% of adults in Slough are considered obese**, a level higher than the England average of 62%, and the highest in the HISA.
- At 63%, **car mode share is relatively high in Slough** compared to the England-wide share of 60%.
- The **road network provides access to a much larger catchment** from Slough town centre than the public transport network.
- Slough has **88% Ultrafast and 11% Superfast Broadband coverage**.

South Bucks

Key Statistics

Business and Employment

Employment



40,000

Employment Growth



15%
(2012-17)

GVA



£86,774

GVA Growth



14%
(2012-17)

People, Place and Well-being

Population



70,040

Population Growth



3%
(2013-18)

Residents with Degree or above



49%

Air Pollution



10.2µg/m3

Travel, Transport & Digital Infrastructure

PT Catchment Population (40 min)



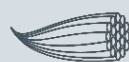
197,000

Driving Catchment Population (20 Min)



302,800

Fibre to the Premises



4%

4G Indoor Coverage

4G

72%

Key Findings

- South Bucks has a **relatively low number of large businesses**.
- South Bucks makes a **higher GVA per FTE contribution than England**.
- South Bucks has a **strong Creative sector employment specialism**.
- South Bucks has an **older population**, with 21% of the resident population over the age of 65 years, compared to 18% in England and 13% across the HISA.
- There is a high proportion of residents in managerial and professional occupations in South Bucks.
- South Bucks has the **highest median earnings to house price ratio** in the HISA (13.42). Almost 70% of neighbourhoods in South Bucks are in the top three deciles (least deprived 30%) for the Income Domain.
- South Bucks also has **very low levels of Health deprivation**.
- It has the **lowest level of air pollution in the HISA**, but still higher than England overall.
- South Bucks has a **higher EU presence** in its population than England.
- South Bucks has the **lowest level of overall deprivation** in the HISA of all the LAs, with half its neighbourhoods in the least deprived quintile of England.
- At 72%, **car mode share is very high in South Bucks**, compared to the England share of 60%.
- The **road network provides access to a much larger catchment** from Beaconsfield than the public transport network.
- South Bucks has **34% Ultrafast and 58% Superfast broadband coverage**.

Spelthorne

Key Statistics

Business and Employment

Employment



37,000

Employment Growth



3%
(2012-17)

GVA



£83,727

GVA Growth



5%
(2012-17)

People, Place and Well-being

Population



99,330

Population Growth



2%
(2013-18)

Unemployment



6%

Air Pollution



10.7µg/m3

Travel, Transport & Digital Infrastructure

PT Catchment
Population
(40 min)



307,300

Driving Catchment
Population
(20 Min)



386,600

Fibre to the
Premises



30%

4G Indoor
Coverage

4G

87%

Key Findings

- Spelthorne has a **relatively low number of large businesses**.
- Spelthorne makes a **higher GVA per FTE contribution than England overall**, though GVA growth has been relatively small in recent years.
- Spelthorne has the **lowest risk of crime of all the HISA LAs**, with only 7% of neighbourhoods in the most deprived quintile of the country for this Domain.
- Spelthorne has a **lower level of qualifications than the other HISA LAs** but is generally on par with England overall. It is the most deprived under the Education, Skills & Training Domain, with 17% of its neighbourhoods in the bottom 20% of England for this Domain.
- There are **no neighbourhoods in Spelthorne which fall into the most deprived** (overall deprivation) 20% of the country.
- At 69%, **car mode share is relatively high in Spelthorne** compared to the England-wide share of 60%.
- The **road network provides much greater connectivity** to Staines than the public transport network, **with the exception of some areas of central London**.
- Spelthorne has a **high level of fibre to the premises (FTTP) coverage**.
- Spelthorne has **84% Ultrafast and 15% Superfast broadband coverage**.

Appendix

Glossary of Terms for Digital Technologies

Speed Categorisations

- + Superfast broadband (SFBB) = download speeds ≥ 30 Mbps and < 300 Mbps
- + Ultrafast broadband (UFBB) = download speeds ≥ 300 Mbps

Technology Categorisations

- + Total fibre coverage = cumulative of superfast and ultrafast broadband coverage
- + Full Fibre to premises = seamless fibre optic connection to a building/property
- + 4G = current incarnation mobile technology, capable of delivering superfast speeds
- + 5G = next generation mobile technology, in its infancy in terms of nationwide deployment

Coverage

- + Superfast, ultrafast, total fibre and full fibre to the premises coverage = % of premises (business and residential) able to access required speeds
- + 4G indoor = % of premises able to access a signal indoors from all mobile operators
- + 4G outdoor = % of premises able to access a signal outdoors from all mobile operators



London

Manchester

0207 336 6188

0161 234 9910

london@regeneris.co.uk

manchester@regeneris.co.uk

www.hatchregeneris.co.uk