

Harrow

Local Economic Assessment 2019 - 2020

Contents

Chapters

1	Introduction, Aims and Objectives	
2	Executive Summary	
3	Linkages and Flows	
4	Population	
5	Labour Market	
6	Skills	
7	Employment	
8	Business and Enterprise	
9	Housing	
10	Planning, Development and Infrastructure	
11	Town Centres, Offices and Industrial Estates	
12	Environmental Infrastructure and Sustainability	
13	Issues and Analysis	

Appendix

Appendix:	Glossary and Further Information	
-----------	----------------------------------	--

List of Maps

Map 1.1:	Harrow in a Regional Context	
Map 3.1:	Public Transport Accessibility Levels (PTALs)	
Map 3.2:	Key Harrow Workforce Flows	
Map 4.1:	Index of Multiple Deprivation	
Map 4.2:	Income Deprivation	
Map 4.3:	Employment Deprivation	
Map 5.1:	Total proportion of claimants of Universal Credit (not in employment) and Jobseeker's Allowance by LSOA, October 2019	
Map 5.2:	Claimants of working age benefits by LSOA, May 2019	
Map 6.1:	Adult Skills Deprivation in Harrow by LSOA	
Map 11.1:	Location of Town Centres, Industrial and Business Use Areas	

List of Figures

Figure 4.1:	Harrow's population by broad age groups, Mid-2018
Figure 4.2:	Harrow's population by age group and gender, 2018
Figure 4.3:	Population Projections for Harrow, 2016 to 2050
Figure 4.4:	Population by Ethnic Group, 2011
Figure 5.1:	Economically Active Rates in the Working Age Population, 2004/05 to 2018/19
Figure 5.2:	Economic Activity and Inactivity in the Working Age Population in Harrow, July 2018 to June 2019
Figure 5.3:	Employment Rates by Age Group, July 2018 to June 2019
Figure 5.4:	Employment Rates by Ethnicity for Working Age Population, July 2018 to June 2019
Figure 5.5:	Employment Rates for Disabled People of Working Age, July 2018 to June 2019
Figure 5.6:	Employment Rates for Males and Females of Working Age, July 2018 to June 2019
Figure 5.7:	Part-time and Full-time Employment in the Working Age Population, July 2018 to June 2019
Figure 5.8:	Number of National Insurance Registrations to Overseas Nationals in Harrow, 2002/03 to 2018/19
Figure 5.9:	Rates of National Insurance Registrations to Overseas Nationals per 1,000 Working Age Population, 2002/03 to 2018/19, UK, London and Harrow
Figure 5.10:	National Insurance Registrations by Region of Origin of Overseas Nationals, Harrow, 2002/03 to 2018/19
Figure 5.11:	Gross Weekly Pay for Full-Time Workers - Comparison by Place of Residence and Place of Work, year to April 2019
Figure 5.12:	Gross Weekly Pay (£) by Workplace and Gender, year to April 2019
Figure 5.13:	Reasons for Worklessness in Working Age Population in Harrow, year to June 2019
Figure 5.14:	Annual unemployment rates, 1996 to 2018
Figure 5.15:	Working Age Benefit Claimants, 2013 to 2019
Figure 5.16:	Household Working Rate Comparisons, 2006 to 2018
Figure 6.1:	Highest Qualification of Residents of Working Age, January 2018 to December 2018
Figure 6.2:	Student destinations after 16 to 18 study, 2018
Figure 6.3:	Number of Apprenticeship Starters in Harrow per Subject Area by Gender, 2018/19
Figure 6.4:	Estimated Proportion of Vulnerable Jobs in Sectors at High Risk of Automation in West London Boroughs
Figure 7.1:	Number of Employee Jobs in Harrow, 1998 to 2018
Figure 7.2:	Harrow Employment Base by Broad Groups, 2018
Figure 7.3:	Relative Change in Employee Jobs in West London, 1998 to 2018
Figure 7.4:	Percentage Employed in the Public Sector as a Percentage of All in Employment in Harrow, 2018/19
Figure 7.5:	Employment of Residents by Occupation, 2018/19
Figure 7.6:	Change in Occupation Structure for Harrow Residents, 2004/05 to 2018/19
Figure 7.7:	Proportion of Residents aged 16-64 who are Self-employed, 2018/19
Figure 7.8:	Proportion of Residents aged 16-64 who are Self-employed, 2004/05 to 2018/19
Figure 7.9:	Employment Projections for Harrow to 2050
Figure 7.10:	Employment Growth Forecast by Sector for Harrow to 2036
Figure 8.1:	Proportion of Total Number of VAT and/or PAYE Based Enterprises in Harrow by Employment Sizeband, 2019
Figure 8.2:	Number of Businesses (Data Units) by Employment Sizebands in Harrow, 2008, 2013, 2018 & 2019
Figure 8.3:	Percentage of Workforce Employed by Business Size (Enterprise Group), Harrow, 2019

Figure 8.4: Percentage of Workforce Employed by Business Size (Data Units), Harrow, 2008, 2013, 2018 & 2019
Figure 8.5: Broad Industry Group by Number of VAT and/or PAYE Based Enterprises, Harrow, 2019
Figure 8.6: VAT and/or PAYE Based Enterprises by Broad Industry Group, 2019
Figure 8.7: Business Births and Deaths in Harrow, 2004 to 2018
Figure 8.8: Business Births in West London, 2004 to 2018
Figure 8.9: Business Births in Harrow by Broad Industry Group, 2015 to 2017
Figure 8.10: Business Deaths in West London, 2004 to 2018
Figure 8.11: Survival of Businesses Born in 2013
Figure 8.12: Percentage of Rateable Value by Sector, Harrow, 2018/19
Figure 8.13: Number of Rateable Properties, Harrow, 2000/01 to 2018/19
Figure 8.14: Change in Business Floorspace Area, Harrow, 2000/01 to 2018/19
Figure 9.1: Average House Prices, 1995 to 2019
Figure 11.1: Retail, Office, Industrial and Other Floorspace in West London, 2018/19
Figure 11.2: Percentage Change in Footfall Compared to 1999/00 Baseline
Figure 11.3: Pedestrian Counts in District Centres, 1999/00 & 2009/10 to 2018/19
Figure 11.4: Vacancy Rates in District Centres, 2009 to 2019
Figure 11.5: Harrow Business Improvement District
Figure 11.6: Total Office Floorspace, 2010 to 2019
Figure 12.1: Carbon dioxide emission estimates, Harrow, 2005 to 2017
Figure 12.2: Local authority collected waste in Harrow per annum (tonnes)
Figure 12.3: Reuse, recycling or composting of Harrow household waste per annum
Figure 12.4: Harrow Heat Network cluster approach

List of Tables

Table 3.1:	Place of Work for Harrow Residents - Age 16-74 (out-flows)
Table 3.2:	Place of Residence for Harrow Workers - Age 16-74 (in-flows)
Table 4.1:	Projected ethnic composition of Harrow's population
Table 5.1:	Employment and Unemployment in the Working Age Population, July 2018 to June 2019
Table 5.2:	Gross Weekly Pay (£) of Resident Population, year to April 2019
Table 5.3:	Hourly Pay Rate (£) for Part-Time and Full-Time Workers for Resident Population, year to April 2019
Table 5.4:	Gross Weekly Pay (£) by Workplace, year to April 2019
Table 5.5:	Hourly Pay Rate (£) for Part-Time and Full-Time Workers by Workplace, year to April 2019
Table 5.6:	Full-Time Gross Weekly Pay (£) by Deciles, year to April 2019
Table 5.7:	Unemployment rates, year to June 2019
Table 5.8:	Universal Credit 'out-of-work' categories - composition by duration and claimant age, November 2019
Table 5.9:	ESA claimants by age and gender, May 2019
Table 5.10:	Working, Mixed and Workless Household Rates, January to December 2018
Table 5.11:	Children in Workless Households, January to December 2018
Table 6.1:	Qualifications of Residents of Working Age, January 2018 to December 2018
Table 6.2:	GCSE and Equivalent Results at the end of Key Stage 4, 2017 to 2019
Table 6.3:	A-level and Equivalent Results, 2017 to 2019
Table 6.4:	Student destinations after 16 to 18 study, 2017 & 2018
Table 6.5:	Number of Harrow Residents by Age Range Starting Apprenticeships in 2018/19
Table 6.6:	English Proficiency of Harrow Residents
Table 6.7:	Estimated Number of Vulnerable Jobs in Sectors at High Risk of Automation in West London Boroughs
Table 6.8:	Estimated Number of Vulnerable Jobs in Sectors at High Risk of Automation in Harrow
Table 7.1:	Harrow Employment by Broad Industrial Groups
Table 7.2:	West London Boroughs Percentage Employment by Broad Industrial Groups, 2018
Table 7.3:	Proportion of Total Employee Jobs which are Full-Time and Part-Time, 2018
Table 7.4:	Job Density in West London Boroughs, 2017
Table 7.5:	Number of Residents aged 16-64 who are Self-employed, 2018/19
Table 7.6:	Borough Employee Growth Projections
Table 7.7:	Borough Trend-based Employment Estimates (self-employed plus employee jobs)
Table 7.8:	Opportunity and Intensification Areas in West London
Table 7.9:	Harrow Workforce Job Growth Forecasts by Sector
Table 8.1:	Number of VAT and/or PAYE based enterprises by Employment Sizebands, March 2019
Table 8.2:	Business Births as a Percentage of Sector Size, Harrow, 2017
Table 8.3:	Percentage of Businesses Born 2007 to 2016 and still Trading after Two Years
Table 8.4:	Business Health Comparisons, 2019
Table 8.5:	Proportion of Jobs in the Knowledge Economy, 2018
Table 8.6:	Number of Rateable Properties and Rateable Value in Harrow, 2018/19
Table 8.7:	UK Competitive Index, London Boroughs, 2015 and 2019
Table 8.8:	Average Fixed Internet Download Speeds, 2019
Table 8.9:	Permissions for Prior Approval for Change of Use from Office to Residential, Harrow, 30th May 2013 to 31st March 2019
Table 9.1:	Housing Tenure, 2011
Table 9.2:	Housing Tenure in West London, 2019

Table 9.3: Subnational Dwelling Stock by Tenure Estimates, West London, 2018
Table 9.4: Income to House Price Ratios in Harrow
Table 11.1: Commercial Floorspace - Total Stock Changes, 2000/01 to 2018/19
Table 11.2: Office Floorspace and Vacancy Rates in Harrow, 2010 to 2019
Table 11.3: Office Floorspace and Vacancy Rates in Harrow Town Centre, 2010 to 2019
Table 11.4: Prime and Secondary Industrial/warehousing Rents per Borough, 2018
Table 11.5: Industrial/warehousing Floorspace Losses 2014/15 to 2018/19
Table 12.1: Carbon dioxide emissions per capita estimates, 2017
Table 12.2: Carbon dioxide emission estimates, Harrow, 2005 to 2017
Table 12.3: Carbon dioxide emission estimates at Harrow's Kodak Factory, 2005 to 2017
Table 12.4: Annual mean concentrations for PM ₁₀ and Nitrogen Dioxide (µg/m ³) at Harrow 1 background monitoring site
Table 12.5: Annual mean concentrations for PM ₁₀ and Nitrogen Dioxide (µg/m ³) at Harrow 2 roadside monitoring site
Table 12.6: Tonnage and percentage of household waste which was recycled, composted or reused by collection authorities, 2018/19
Table 12.7: Gas Consumption, 2018
Table 12.8: Electricity Consumption, 2018