

Appendix 5

Employment projections for LBHF



Employment projections for Hammersmith and Fulham

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S1	1. Overview projections
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S3	3. Sector Projections
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Notes on data

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These notes summarise different data sources reviewed and used to generate these employment projections.

Data, and analysis based on data, from each source is included in:

- 1.1 Projected employment in Hammersmith and Fulham
- 1.2 Projected employment growth in Hammersmith and Fulham
- 1.3 Indexed Employment growth in Hammersmith and Fulham

The below data description summaries indicate which data is used in all other tables and charts in this workbook.

BRES:

ONS Business Register and Employment Survey (BRES) provides estimates of employee jobs. Data is available broken down by sector and geography. BRES data is only available from 2009 and only includes employee jobs - i.e. not self employed workers and not total employment.

BRES data was used to calculate:

- 4.1 Specialisms in Hammersmith and Fulham

TCR:

TCR - Trends Central Resource - is one of the most extensive bodies of information on UK enterprise. It contains data on nearly 3 million live firms and organisations in the UK, together with historical information on a further 5 million organisations going back to the 1970s.

Unlike other data sources it includes firms below the VAT threshold, branch sites, and the self-employed. It also contains, for each firm on the database, details on size and performance, business activity, ownership structures, executives, type of entity, start-up year and a host of other descriptors.

TCR includes SIC classifications for each business record, however, due to how data is collected, at a very granular level (4 or 5-digit SICs) these may be different to SIC classifications in other datasets.

TCR data is used exclusively in:

- 4.2 Indexed growth of employment in key sectors

GLA:

GLA Economics have calculated employment projections for London and London Boroughs. The projections are based on the employee and self-employed components of ONS Workforce Jobs series, BRES data and Annual Population Survey. They are constructed by projecting from the latest data point.

Sector employment projections are only presented at a London level. We have applied the proportion of employment in each sector in London to the employment level of Hammersmith and Fulham to estimate sector employment projections in the borough.

The GLA data is used exclusively in:

- 2.1 Employment projections in Hammersmith and Fulham and comparisons
- 2.2 Employment growth in Hammersmith and Fulham compared to London as a whole
- 3.1 GLA Projections
- 3.2 Sectors with employment growth
- 3.3 Sectors with declining employment

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Employment projections for LBHF

1. Overview projections

These overview projections show forecast total employment growth in Hammersmith and Fulham up to 2036. Projections from three different data sources are presented for comparison, from: GLA, TCR and BRES. Whereas TCR and GLA data are very similar, at this level BRES appears too unreliable - especially when looking at individual sectors. Thus in more in-depth projections we have used GLA data, and showing TCRs estimate of growth in key sectors in comparison.

1.1 Forecast employment in Hammersmith and Fulham

Rounded historic trends and future projections.

Forecasts are based on the compound annual growth rate from the earliest to most recent time point in each data series, and projected forward to 2036.

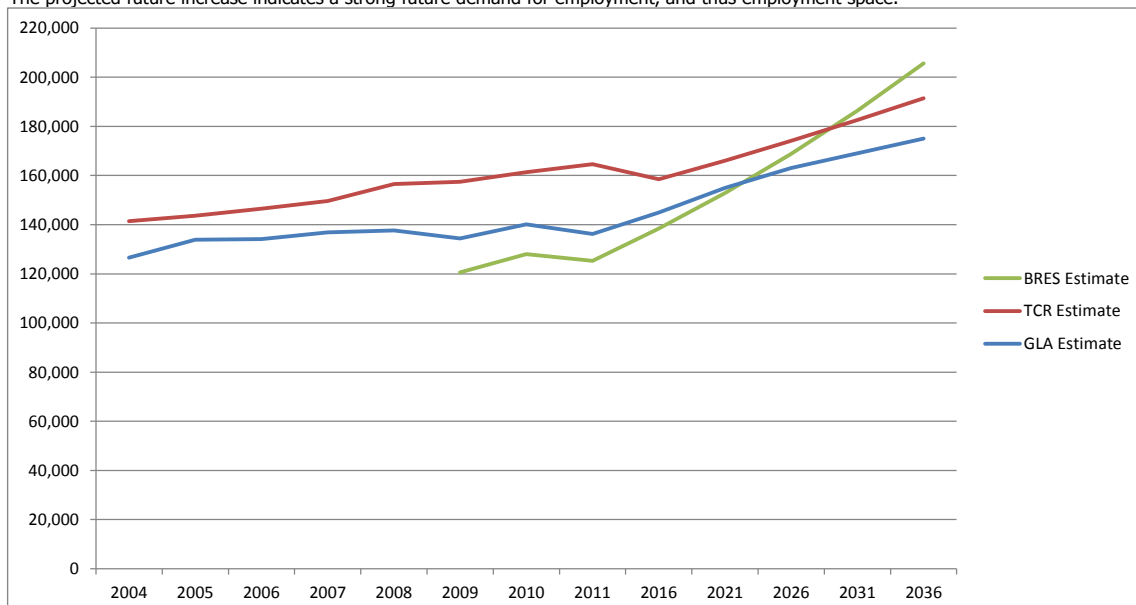
Hammersmith and Fulham	2004	2005	2006	2007	2008	2009	2010	2011	2016	2021	2026	2031	2036
GLA Estimate	126,650	133,850	134,200	136,900	137,650	134,450	140,100	136,250	145,000	155,000	163,000	169,000	175,000
TCR Estimate	141,450	143,650	146,450	149,700	156,500	157,450	161,350	164,600	158,450	166,100	174,150	182,550	191,400
BRES Estimate						120,550	128,050	125,300	138,450	152,850	168,750	186,300	205,650

1.2 Forecast employment growth in Hammersmith and Fulham

TCR, GLA and BRES based forecasts are shown for comparison (refer to notes).

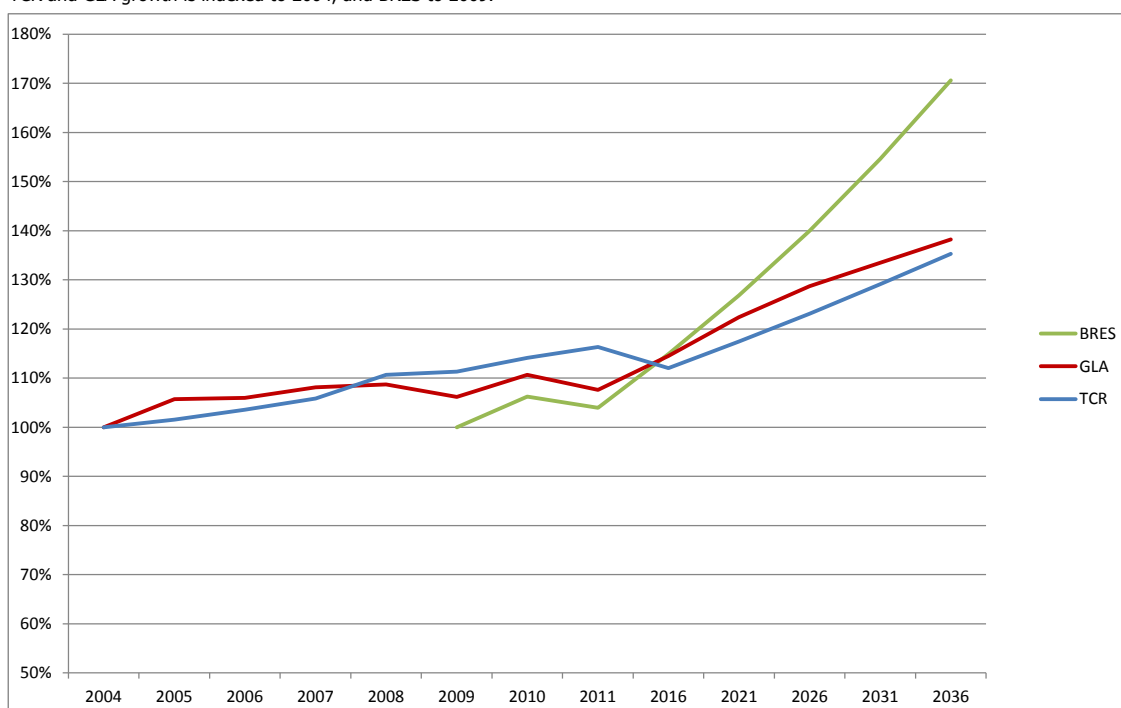
This projection is in contrast to recent trends. For the four years prior to 2014 employment in Hammersmith and Fulham has decreased.

The projected future increase indicates a strong future demand for employment, and thus employment space.



1.3 Indexed Employment growth in Hammersmith and Fulham

TCR and GLA growth is indexed to 2004, and BRES to 2009.



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2. Comparison projections

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2.1 Employment projections in Hammersmith and Fulham and comparisons

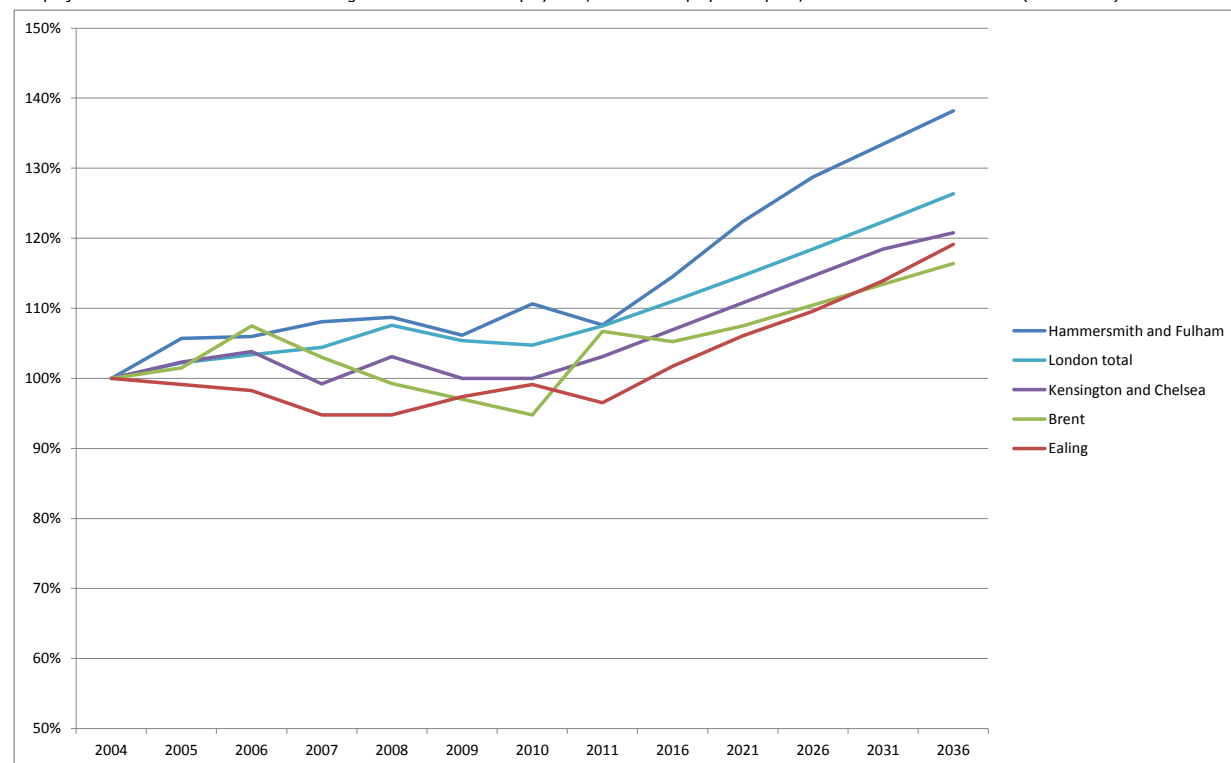
Location	2004	2005	2006	2007	2008	2009	2010	2011	2016	2021	2026	2031	2036
Hammersmith and Fulham	126,650	133,850	134,200	136,900	137,650	134,450	140,100	136,250	145,000	155,000	163,000	169,000	175,000
Brent	114,800	113,500	112,750	109,350	108,950	112,100	113,800	110,800	117,000	122,000	126,000	131,000	137,000
Ealing	134,250	136,150	143,700	138,100	132,600	129,650	127,100	143,100	141,000	144,000	148,000	152,000	156,000
Kensington and Chelsea	130,000	133,450	134,700	129,300	134,000	129,950	130,200	133,600	139,000	144,000	149,000	154,000	157,000
London total	4,556,000	4,658,000	4,709,000	4,758,000	4,902,000	4,801,000	4,773,000	4,896,000	5,057,000	5,224,000	5,396,000	5,573,000	5,757,000

2.2 Employment growth in Hammersmith and Fulham compared to London as a whole

Using the GLA projections data (as shown in S1 for Hammersmith and Fulham) , we can see that employment in Hammersmith and Fulham will grow more than than in London, and more than in neighbouring boroughs.

This projection is in contrast to recent trends. For the four years prior to 2014 employment in Hammersmith and Fulham has decreased.

The projected future increase indicates a strong future demand for employment, and thus employment space, in Hammersmith and Fulham (2004 = 100).



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3. Sector Projections

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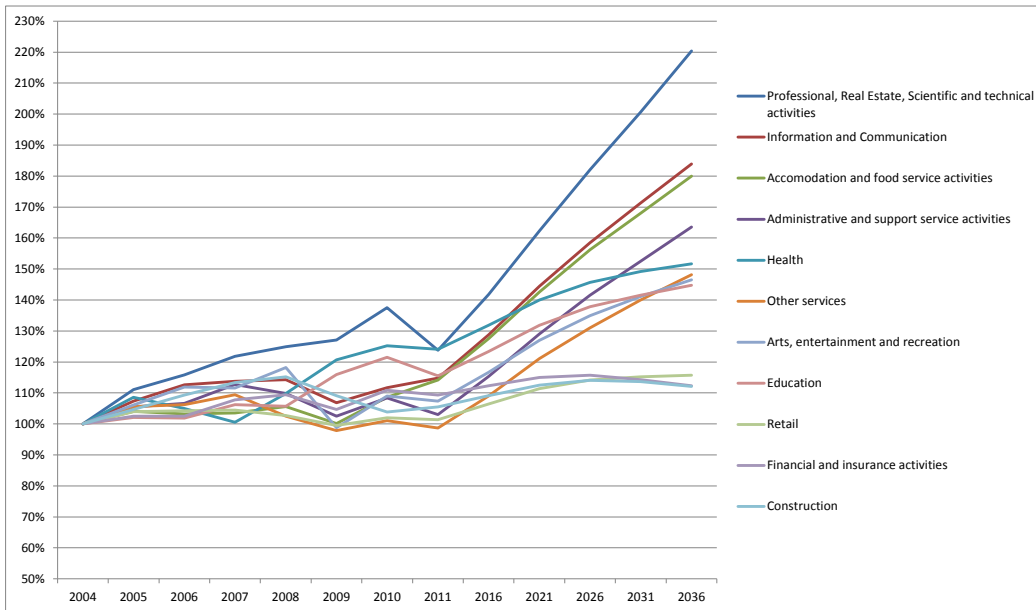
3.1 GLA Projections

The GLA employment projections data only provide sector data for London as a whole. We have applied the proportions for each sector for London to Hammersmith and Fulham.

Hammersmith and Fulham	2004	2005	2006	2007	2008	2009	2010	2011	2016	2021	2026	2031	2036
Primary & utilities	700	850	850	850	900	800	800	900	750	700	600	500	450
Manufacturing	5,250	5,050	4,750	4,800	4,400	3,600	3,700	3,600	2,850	2,250	1,750	1,350	1,050
Construction	6,750	7,050	7,350	7,600	7,750	7,350	7,000	7,100	7,350	7,550	7,650	7,650	7,550
Wholesale	6,050	6,200	5,900	6,000	5,700	5,250	5,350	5,100	4,850	4,600	4,300	3,900	3,550
Retail	11,450	11,900	11,950	11,950	11,750	11,400	11,700	11,600	12,200	12,750	13,100	13,200	13,250
Transportation and Storage	7,200	7,700	7,550	7,750	7,950	7,650	7,550	7,400	7,250	7,100	6,850	6,450	6,050
Accommodation and food service activities	8,700	9,050	9,000	9,000	9,200	8,700	9,450	9,950	11,100	12,400	13,600	14,600	15,650
Information and Communication	8,750	9,350	9,850	9,950	9,950	9,300	9,750	10,000	11,250	12,600	13,850	14,950	16,050
Financial and insurance activities	9,350	9,600	9,600	10,100	10,250	9,800	10,400	10,250	10,500	10,750	10,850	10,700	10,500
Professional, Real Estate, Scientific and technical activities	15,050	16,750	17,450	18,350	18,800	19,150	20,700	18,650	21,350	24,450	27,450	30,250	33,200
Administrative and support service activities	12,500	13,200	13,350	14,100	13,750	12,800	13,550	12,900	14,400	16,150	17,700	19,050	20,450
Public Admin and defence	6,750	7,350	7,000	6,750	6,600	6,800	6,850	6,300	6,200	6,150	6,000	5,700	5,400
Education	8,500	8,700	8,650	9,050	9,000	9,850	10,350	9,800	10,500	11,200	11,700	12,050	12,300
Health	11,500	12,500	12,100	11,550	12,650	13,900	14,400	14,300	15,150	16,100	16,750	17,150	17,450
Arts, entertainment and recreation	4,250	4,500	4,750	4,750	5,050	4,200	4,650	4,550	4,950	5,400	5,750	6,000	6,250
Other services	3,900	4,150	4,150	4,300	4,000	3,850	3,950	3,850	4,250	4,750	5,150	5,500	5,800
All sectors	126,650	133,850	134,200	136,900	137,650	134,450	140,100	136,250	145,000	155,000	163,000	169,000	175,000

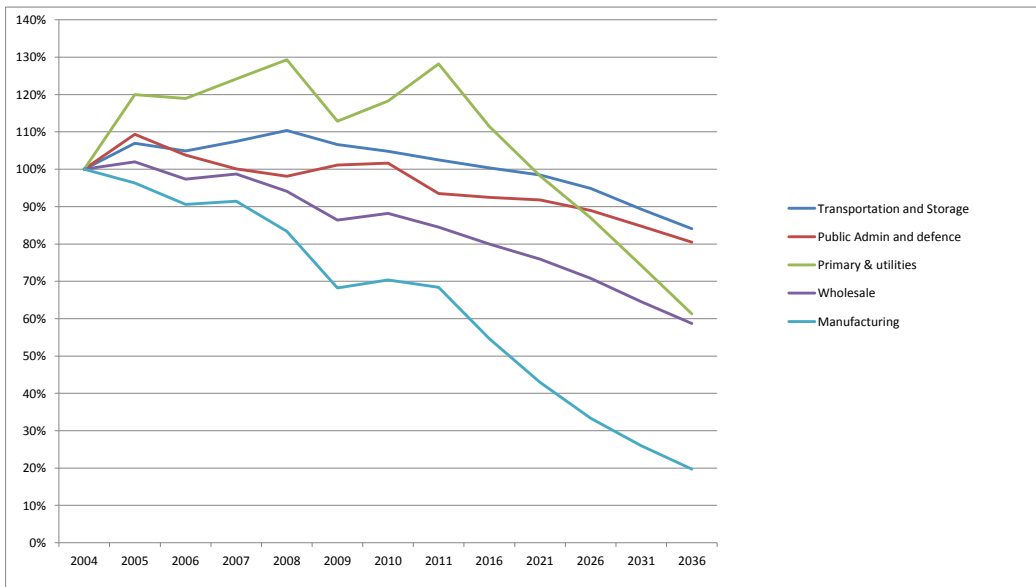
3.2 Sectors with employment growth

A number of sectors are forecast to see employment growth in Hammersmith and Fulham, including sectors located in B1 space. Indexed (2004 = 100)



3.3 Sectors with declining employment

Sectors which are forecast to see a reduction in employment are not associated with B1 land use (2004 = 100).



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4. Key sectors

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4.1 Specialisms in Hammersmith and Fulham

Location quotients were calculated using BRES 2014 data to identify key sectors and areas of specialism within Hammersmith and Fulham. These were:

Hammersmith and Fulham

Administrative and Support Service Activities
Advertising
Arts, Entertainment and Recreation
Computer programming, consultancy and related activities
Development of building projects
Food and beverage service activities
Motion picture, video and television programme production, sound recording and music publishing activities
Other manufacturing
Other Service Activities
Passenger Transport
Photographic Activities
Professional
Programming and broadcasting activities
Provision of services to the community as a whole
Publishing activities
Real estate activities
Reproduction of recorded media
Wholesale and retail trade

4.2 Indexed growth of employment in key sectors

Using TCR data, we estimate that in aggregation, employment these sectors will grow faster than in the Hammersmith and Fulham economy as a whole (2004 = 100).

