

EMPLOYMENT ANALYSIS

1. An analysis of employment in Kingston Town Centre based on government and local figures (Office of National Statistics & ODPM employment data 2005, Valuation Office Agency figures and local BIDs information) provides an understanding of the pattern of employment and the balance of jobs in different types of activity, such as retail, office, catering and leisure.

2. The town centre has around 700 employers and 17,500 employees. Table 1 gives a breakdown of employment and businesses/organisations by type of activity. The largest single category of employment is retail, with the largest number of businesses and employees. Around 7,900 people (45%) are employed in 400 shops (54% of businesses). There is a significant office sector, with private businesses comprising a third of organisations (241) providing 21% of jobs (3,600). The 8 organisations involved in public administration (RBK; Surrey County Council; the Police; Crown, County and Magistrates Courts; the Inland Revenue and the Department for Works and Pensions), employ nearly 2,700 people. The Leisure and Catering sector (80 businesses) provides 1,600 jobs (9%) and Kingston University and Kingston College account for the remaining 1,600 jobs (9%). Aggregate employment in private sector offices (nearly 3,700) and the public sector (nearly 2,700) amounts to around 6,300 persons or 36% of total employment, which compares with nearly 8,000 jobs or 45% of total employment in the retail sector.

TABLE 1 – Employment in Kingston Town Centre by type of activity

Source: - Office of National Statistics, Office of the Deputy Prime Minister Jan 2005 (ODPM); SIC Figures; RBK Surveys; Valuation Office Agency and BIDs figures

Type of Activity	No. of Businesses/ Organisations	%	No. of Employees	%
Retail	400	54.0%	7,960	45.4%
Private Sector Offices	241	32.5%	3,670	20.9%
Civic and Public Administration	8	1.0%	2,680	15.3%
Restaurants; Licensed Premises; Arts, Culture and Entertainment	80	11.0%	1,600	9.1%
Higher Education	2	0.2%	1,600	9.1%
Other (showrooms & surgeries)	10	1.3%	N/a	N/a
Total	741	100%	17,510	100%

3. Table 2 gives details of the number of employees and businesses/ organisations by size of business. At the upper end of the scale, 6 organisations employ over 500 people, providing 5,300 jobs or 28% of total employment. The highest number of jobs (5,400) are in businesses employing 10-49 people, whilst the greatest number of businesses (355) employ less than 10 people.
4. The discrepancy of 1,500 jobs between Tables 1 and 2 is thought to be due to the inclusion in Table 2 of some employment in staffing agencies where people do not work at the office where they are registered.

TABLE 2 – Kingston Town Centre – Employment by Size of Business/Organisation Source – Office of National Statistics

Employment	No. Businesses	%	Nos. of Employees	%
1000+	1	0.1%	1,084	5.7%
500 – 999	5	0.6%	4,208	22.0%
100 – 499	26	3.5%	3,961	20.8%
50 – 99	43	5.8%	2,660	14.0%
10 – 49	311	41.9%	5,362	28.1%
1 – 9	355	47.9%	1,792	9.4%
Total	741	100%	19,067	100%

5. The 10 largest employers in the town centre are:-
 - Kingston Council
 - Kingston University
 - Surrey County Council
 - John Lewis Department Store
 - Marks & Spencer
 - Kingston College
 - Bentalls Department Store
 - London General Holdings (Insurance)
 - Lever Faberge
 - the TUI Specialist Holiday Group in Wood Street
6. Table 3 sets out the details of types of office based businesses/ organisations, public and private, within the town centre (in descending order) and employment by type of business. The greatest number of businesses are those involved in wholesale and retail (32); consulting (26); banking and building societies (24) and personnel and recruitment (23). In employment terms, the highest employment is in the public sector (2,680). There is also significant employment in personnel/recruitment (695); wholesale/retail (364); insurance/pensions (404 persons); manufacturing e.g. Lever Faberge (463) and banks/building societies (309).

TABLE 3 – Analysis of Office Based Employment

Source: - Office of National Statistics

Type of Business	No. of Businesses		Employment	
	No.	%	No.	%
Wholesale /retail	32	12.8	364	5.7
Consulting	26	10.4	281	4.4
Bank/building society	24	9.6	309	4.8
Personnel/recruitment	23	9.2	695	10.9
Real estate	18	7.2	112	1.7
Food /hospitality	15	6	194	3
IT	14	5.6	121	1.9
Insurance/Pension	10	4	404	6.3
Health/Beauty	10	4	171	2.7
Social work	8	3.2	54	0.8
Public administration	8	3.2	2,680	42.2
Legal services	8	3.2	85	1.3
Education	8	3.2	81	1.2
Service activities	7	2.8	69	1
Printing/Publishing	6	2.4	167	2.6
Cleaning services	6	2.4	29	0.5
Finance	5	2	55	0.8
Trade Unions	4	1.6	10	0.1
Gambling	4	1.6	18	0.3
Security services	3	1.2	15	0.2
Manufacturing	3	1.2	463	7.3
Leisure/Recreation	3	1.2	9	0.1
Charitable/Vol. Org.	2	0.8	23	0.4
Transport	1	0.4	0	0
Storage	1	0.4	13	0.2
Total	249	100	6,350	100

7. Table 4 compares employment between 1978 and 2004. There has been a significant increase in employment in the retail sector (from 6,142 in 1978 to 7,960 in 2004). There was a small increase in employment in the private office sector (from 3,451 in 1978 to 3,670 in 2004) and a decrease in employment in the public sector (from 3,802 in 1978 to 2,680 persons in 2004).

TABLE 4 – Comparison of Employment between 1978 and 2004

Source: - Kingston Town Centre Local Plan, April 1985 & Office of National Statistics, ODPM

Type of business	1978		2004	
	No.	%	No.	%
Retail	6,142	31.5	7,960	45
Local and Central Government	3,802	19.5	2,680	15.3
Office (private sector)	3,451	17.7	3,670	20.9
Industry	1,521	7.8	NA	NA
Education	1,657	8.5	1,600	9.1
Public Utilities	1,716	8.8	NA	NA
Services	994	5.1	NA	NA
Other	214	1.1	1600	9.1
Total	19,500	100	17,510	100

8. For the future, it is considered important to try to maintain a balance between different types of employment and to provide a wide range of job opportunities. Any significant increase in retail floorspace with new shopping facilities, would increase retail employment, whilst the relocation of Surrey County Council HQ outside the borough to Woking, will result in the loss of around 500 public sector office based jobs in the town centre.

Creative Industries Sector within Kingston

9. The Creative Industries has its 'origins in individual creativity, skill and talent and which has the potential for wealth and job creation through the generation and exploitation of intellectual property' (Department for Culture, Media and Sports (DCMS) *Creative Industries Mapping Document 1998*). Examples of jobs within this sector include; advertising, architecture, crafts, design, software, arts, media and publishing.

10. The Creative Industries is an important sector to London's economy as it attracts highly skilled workers and has wider economic impacts than some other economic activities. It also has the ability to attract and retain highly skilled people and with the income that it generates leading to job creation within other sectors.

11. Within Greater London, the creative industries sector is the third largest sector of employment and the second biggest source of job growth. Within Kingston there are approximately 1,430 creative industries firms which employ in the region of 6,000 people, each firm employing an average of 4 employees (A Feasibility Study for Kingston Centre for Creative Industries, 2005). This equates to 2.1% of all creative industry firms and 1.5% of creative employees in London (2002 figures). These figures thus indicate that there is a strong potential for entrepreneurship within the borough.

12. A study undertaken by DTZ Pineda Consulting for the Kingston Innovation Centre in 2003/4 identified that the Creative Industry sector within Kingston specialises in book and sound recording publishing, software, architecture and engineering. Between 1998 and 2002, the study found that there was a downturn in the growth of this sector in Kingston as a whole which was a reflection of the state of the economy at the time. However, certain sectors within the Creative Industries showed an upturn. These sectors were; motion and video production, publishing, advertising, TV and radio and photographic activities.
13. Although the creative industries sector was identified as being a potentially strong sector, certain factors currently hinder its growth. The problems identified included a lack of adequate and affordable incubation and workspace provision and an associated lack of business support. Given the benefits of the creative industries for the economy there is an economic rationale for supporting this sector within Kingston. The benefits of supporting the Creative Industries include; employment creation, diversification of the town centre, economic stimulation, and well-paid and sustainable employment. One mechanism for supporting this sector would be through the development of an innovative centre for the borough which would help exploit the unrealised growth potential for Creative Industries within the Kingston and south London economy. The benefits of which would be threefold; for the borough, the local economy and the employers.