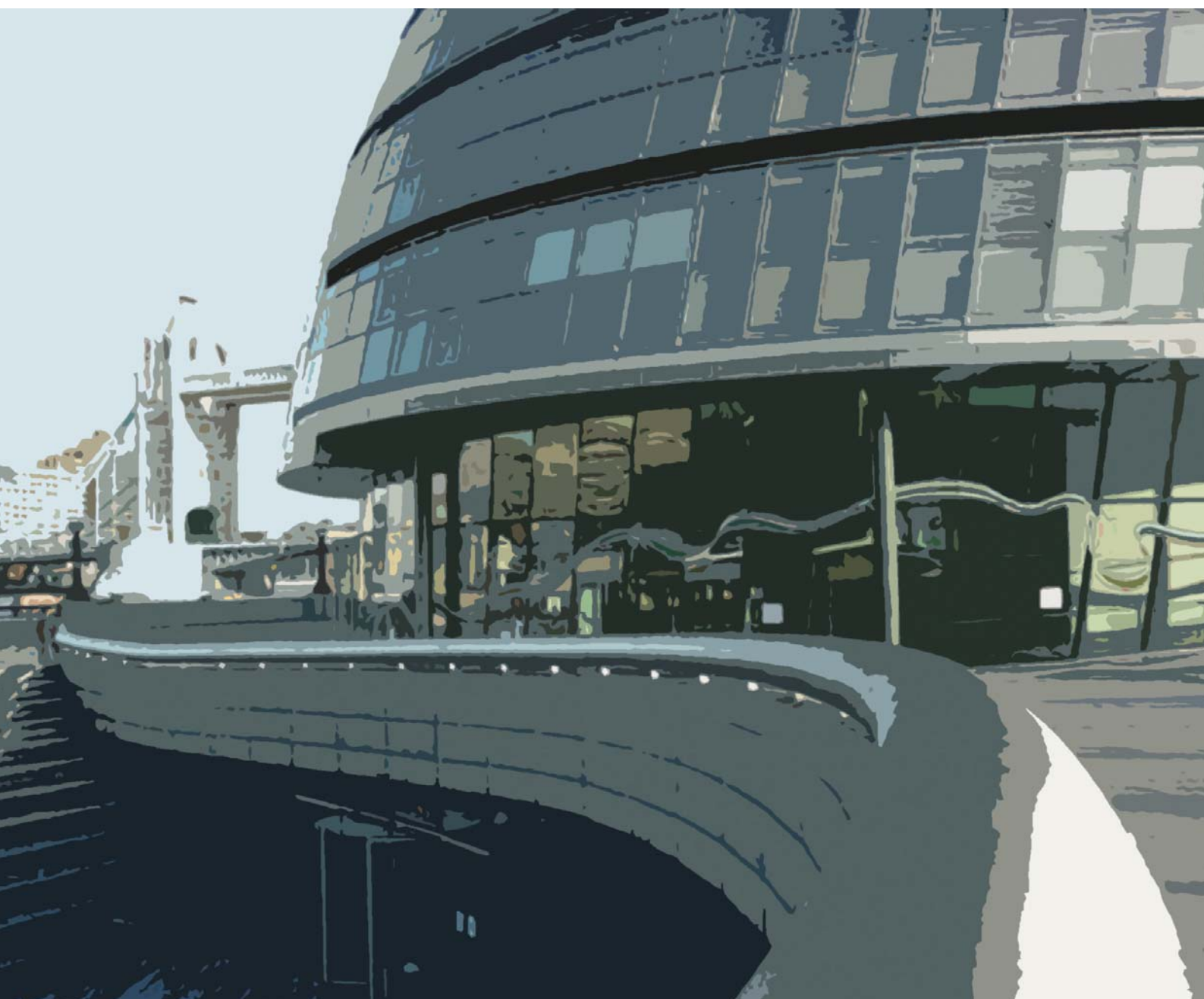


Working Paper 24

# **An analysis of London's employment by sector**

By **Richard Prothero**



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## **Executive summary**

This report describes London's employment structure by analysing employment data on a sector-by-sector basis. By covering all sectors it allows each individual sector to be seen in the wider context of the whole London economy. A detailed breakdown of employment within each sector is also provided and areas of specialisation identified.

Business services is the largest employment sector in London, with 1.07 million workforce jobs in 2004, 24 per cent of London's total employment of 4.49 million. Approximately half of these business service jobs are in high-value business service occupations such as law, accountancy, management consultancy, architecture, engineering and advertising. Other jobs in business services include support business services, such as cleaning, security and jobs related to real estate activities. London has a very strong specialisation, relative to the rest of Great Britain, in business services.

London has an even stronger specialisation in financial services, particularly banking and other financial intermediation activities such as security broking and fund management. There were 326,000 workforce jobs in the financial services sector in London in 2004.

Another London specialisation is media activities, an employment sector that lies within the 'Other Services' sector of the economy. Also in 'Other Services' are jobs in leisure and recreation and it is the growth in these sectors that has made 'Other Services' one of the fastest growing employment sectors of the London economy and home to 364,000 workforce jobs in 2004.

The 'Hotels and Restaurants' sector in London has shown strong employment growth over the past decade with a total of 310,000 workforce jobs in this sector in 2004. Jobs in bars and catering are included in this sector alongside jobs in hotels and restaurants.

By contrast to jobs in the service sectors, London manufacturing jobs are in long-term decline. Since 1971, manufacturing employment in London has declined by 75 per cent, a net loss of over 800,000 jobs. In 2004, just 254,000 jobs remained in manufacturing, of which 60,000 were in publishing (a sector arguably more linked to media services than to manufacturing). High-tech manufacturing accounts for just 15,000 employee jobs in London.

Other significant private sector employment sectors in London are retail, which provides around 400,000 workforce jobs; transport and communications with 340,000 workforce jobs; wholesaling with 233,000 workforce jobs; and construction with 222,000 workforce jobs. London additionally has 950,000 workforce jobs in the largely public sector areas of health, education and public administration.

Further details on all these sectors are included within the main text of this report which provides disaggregated employment data and trends and data showing London's areas of specialisation within each sector.

## 1. Introduction

Employment data analysis is a useful tool for understanding the wider economy and assessing the sense and implications of policy. For example, understanding that business service employment in London has been rising for the past thirty years whilst manufacturing employment has been declining is a first step towards understanding the changes to the London economy that have been taking place over this time.

The aim of this report, therefore, is to unlock some of the London employment data and by doing so provide a broad overview of the London economy whilst additionally providing a more detailed analysis of what occupations are actually included within the broad employment categories often used.

For example, the 'Business Services' chapter confirms that London specialises in this sector and provides a breakdown that shows jobs within this sector include lawyers, accountants and industrial cleaners.

The analysis in this report has followed the format of the Standard Industrial Classification (SIC) system. The SIC is used for classifying business establishments and other statistical units by the type of economic activity in which they are engaged. It provides a framework for the collection, tabulation, presentation and analysis of data and its use promotes uniformity.<sup>1</sup>

There are advantages and disadvantages to sticking rigidly to the format of the SIC. The main advantage is that it provides uniformity between different reports and data sets. As employment forecasts produced by the Greater London Authority (GLA) follow the SIC categorisations, this allows GLA reports to be compared to future and past reports and reports produced by others.

There are disadvantages however in sticking rigidly to the format of the SIC, particularly the fact that the categorisations it provides may not always be the most suitable for attempting to answer an economic problem or in attempting to gain further insights into the London economy. In an accompanying report to this one<sup>2</sup>, GLA Economics therefore take an alternative view of the sectors and the links within the London economy by moving away from the usual order of the SIC classification and creating alternative categorisations that are arguably more intuitive to today's London economy. This second report builds on the data and analysis in this initial report.

The data shown in this report includes time-series data of London's employment in each sector and calculation of London's share of total Great Britain (GB) employment by sector. More details of the data sources used and the calculations made are given in

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<sup>1</sup> National Statistics, 2003, UK Standard Industrial Classification of Economic Activities 2003. View: [http://www.statistics.gov.uk/methods\\_quality/sic/downloads/UK\\_SIC\\_Vol1\(2003\).pdf](http://www.statistics.gov.uk/methods_quality/sic/downloads/UK_SIC_Vol1(2003).pdf)

<sup>2</sup> GLA Economics, forthcoming, An expenditure based analysis of employment sectors in London

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Appendix A which includes definitions of key terminology used in this report such as the index of specialisation and the difference between workforce and employee jobs.

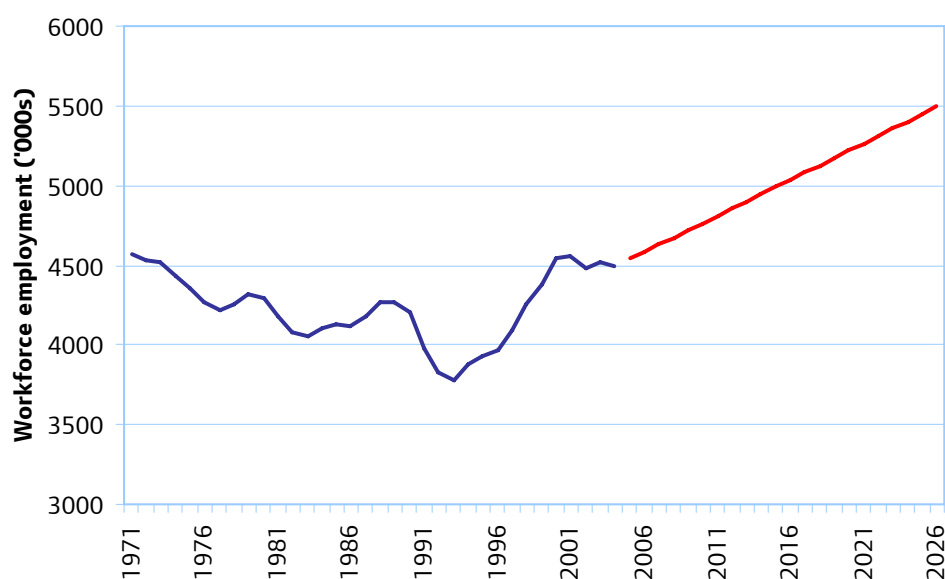
## 2. Total London employment

The focus of this report is on sectors. However, before analysing the sectors individually it is useful to briefly show the trends in overall London employment to provide a context for the discussion. Figure 2.1 shows historical and forecast total workforce employment in London while Figure 2.2 splits current employment amongst the SIC sectors. Table 2.1 shows the broad areas of specialisation of the London economy.

### Employment trends

Through the 1970s and 1980s, total employment in London declined mainly due to the declining manufacturing base. Since the early 1990s, however, employment in London has grown strongly on the back of growth in business services employment and buoyed by London's world city role during a period of increased globalisation. It is this more recent trend that is expected to dominate over the next two decades with London building on its key role in global financial and business services leading to overall London employment increasing up to a total of 5.5 million by 2026.

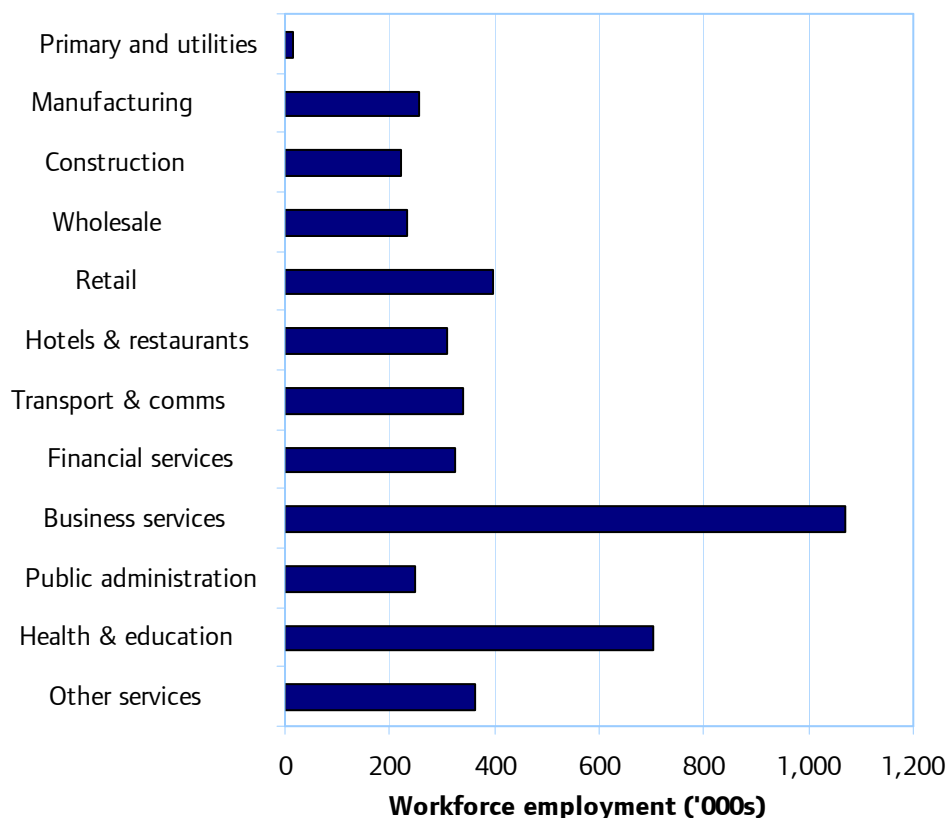
**Figure 2.1: Total London workforce employment, 1971 – 2026**



Source: EBS and Volterra

Figure 2.2 splits the latest employment data by sector. It illustrates just how important the business services sector now is to the London economy. It provides over one million jobs compared to 700,000 in health and education and just 400,000 in the next largest sector of retail.

Aside from business services and health and education it can be seen from Figure 2.2 that the majority of the sectors examined in this report are of similar size in terms of overall employment, with between 200,000 and 400,000 workers in London.

**Figure 2.2: London employment by sector, 2004**

Source: EBS

### Employment specialisations

Table 2.1 shows the share of GB jobs in each sector that are based in London, and the corresponding index of specialisation. It shows that across these broad sector categories, London's biggest specialisation is in financial services, a sector where London has 30 per cent of total GB employment. Business services and other services also have a high index of specialisation reinforcing just how important services are to the London economy. By contrast, just seven per cent of total manufacturing employment in the UK is located in London, showing that it is the rest of the UK, and not London, that specialises in the manufacturing sector.



**Table 2.1: London share of GB employee jobs by sector, 2005**

|                            | <b>London share of GB<br/>employee jobs</b> | <b>Index of<br/>specialisation</b> |
|----------------------------|---|------------------------------------|
| Primary and utilities      | 3%  | 0.16                               |
| Manufacturing              | 7%  | 0.42                               |
| Construction               | 10%   | 0.62                               |
| Wholesale                  | 12%   | 0.78                               |
| Retail                     | 13%   | 0.81                               |
| Hotels & restaurants       | 17%   | 1.12                               |
| Transport & communications | 20%   | 1.35                               |
| Financial services         | 30%   | 2.32                               |
| Business services          | 23%   | 1.64                               |
| Public administration      | 17%   | 1.13                               |
| Health & Education         | 12%   | 0.76                               |
| Other services             | 20%   | 1.34                               |

*Source: Annual Business Inquiry (ABI)*

More detailed discussion of London's specialisations within each sector is given through the remainder of the report.

### 3. Primary and utilities

Primary and Utilities is a combination of the following SIC sectors:

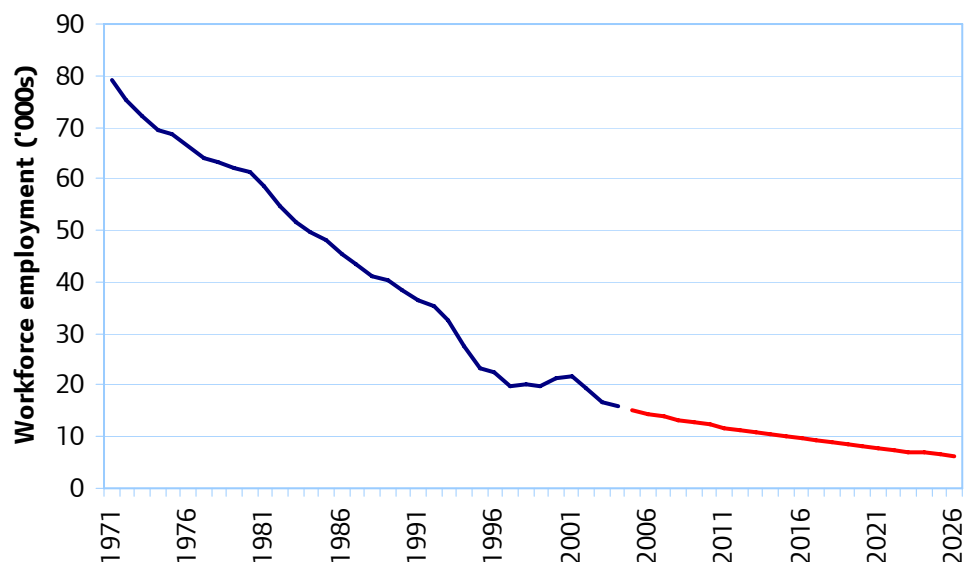
- A: agriculture, hunting and forestry
- B: fishing
- C: mining and quarrying
- E: electricity, gas and water supply.

These are all areas in which there is very little employment within London and in which London does not specialise.

#### Employment trends

Employment in 'Primary and Utilities' has declined from 79,000 in 1971 to just 16,000 in 2004.

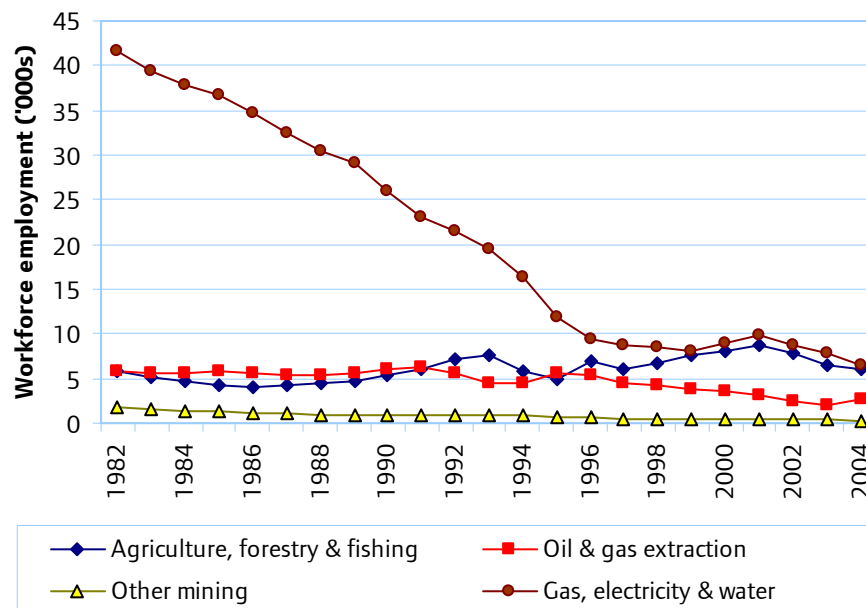
**Figure 3.1: Primary and utilities workforce employment, 1971 – 2026**



Source: Experian Business Strategies (EBS) and Volterra

This spectacular decline has been due to a sharp reduction in employment in the utilities of electricity, gas and water supply. This can be seen in Figure 3.2.

**Figure 3.2: Primary and utilities workforce employment by sector, 1982 – 2004**



Source: EBS

### Employment specialisations

The extent to which London does not specialise in these sectors can be seen in Table 3.1 by the index of specialisation of just 0.16.

**Table 3.1: Primary and utilities - London's share of GB employee jobs, 2005**

|                                   | London employee Jobs | London share of GB employee jobs | Index of specialisation |
|-----------------------------------|----------------------|----------------------------------|-------------------------|
| Primary and utilities             | 10,400               | 3%                               | 0.16                    |
| Agriculture, forestry and fishing | 2,400                | 1%                               | 0.06                    |
| Oil and Gas Extraction            | 3,100                | 11%                              | 0.69                    |
| Other Mining                      | 200                  | 1%                               | 0.04                    |
| Gas, Electricity and Water        | 4,600                | 5%                               | 0.29                    |

Source: ABI

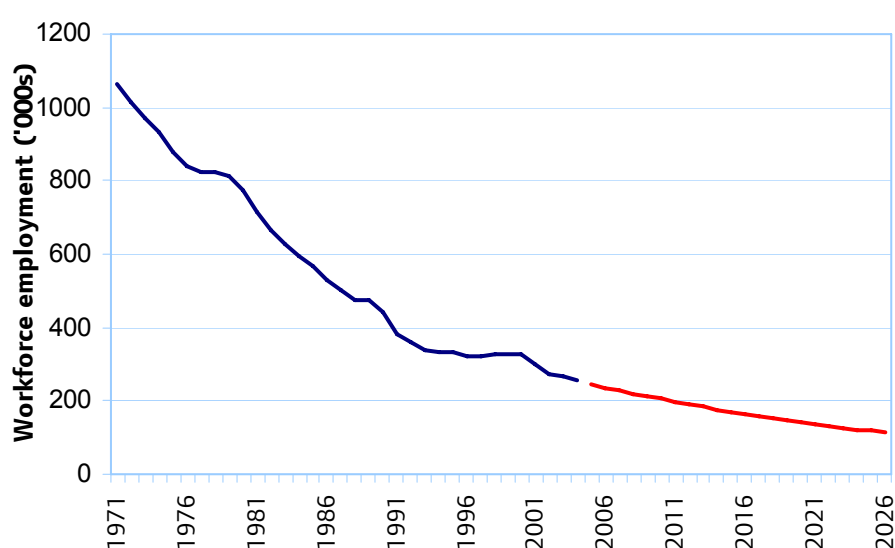
## 4. Manufacturing

Manufacturing employment has declined massively over the past three decades. The decline would be even greater in the statistics were it not for the fact that the SIC includes publishing as a manufacturing sector. Publishing is an area in which London specialises. In all other aspects of manufacturing London does not specialise.

### Employment trends

In 1971, there were more than one million people employed in manufacturing in London. In 2004, there were just 245,000.

**Figure 4.1: Manufacturing workforce employment, 1971 – 2026**

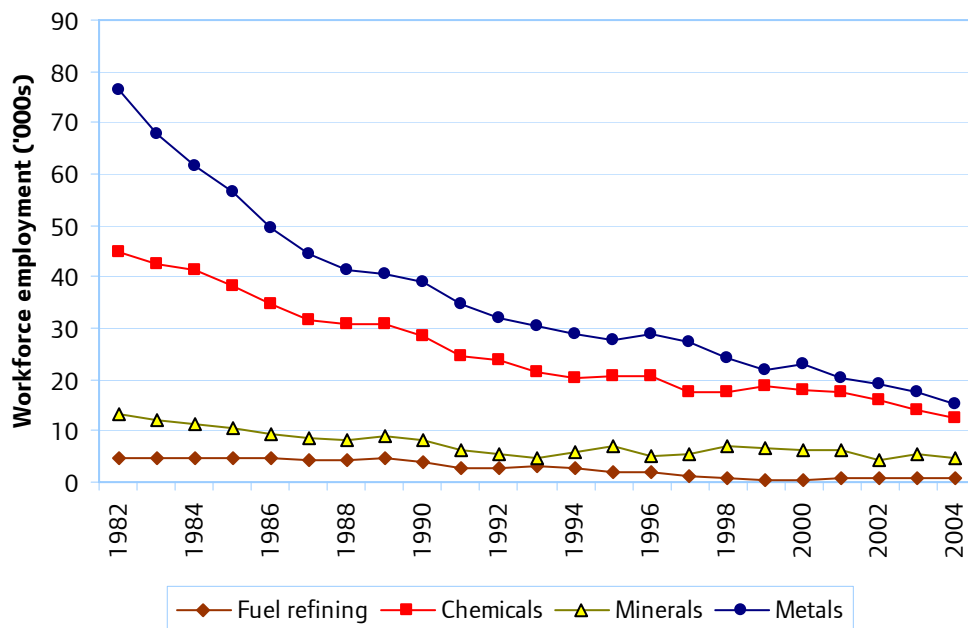


Source: EBS and Volterra

Figures 4.2 - 4.3 split manufacturing up into different sectors. What they show is that the decline in manufacturing employment has happened across all manufacturing sectors with just one exception.

The one exception is publishing in which employment has been increasing. However, this reflects the argument that publishing is not strictly a manufacturing sector. Rather it has more similarities with the various media professions found within the 'Other Services' sector of the SIC.

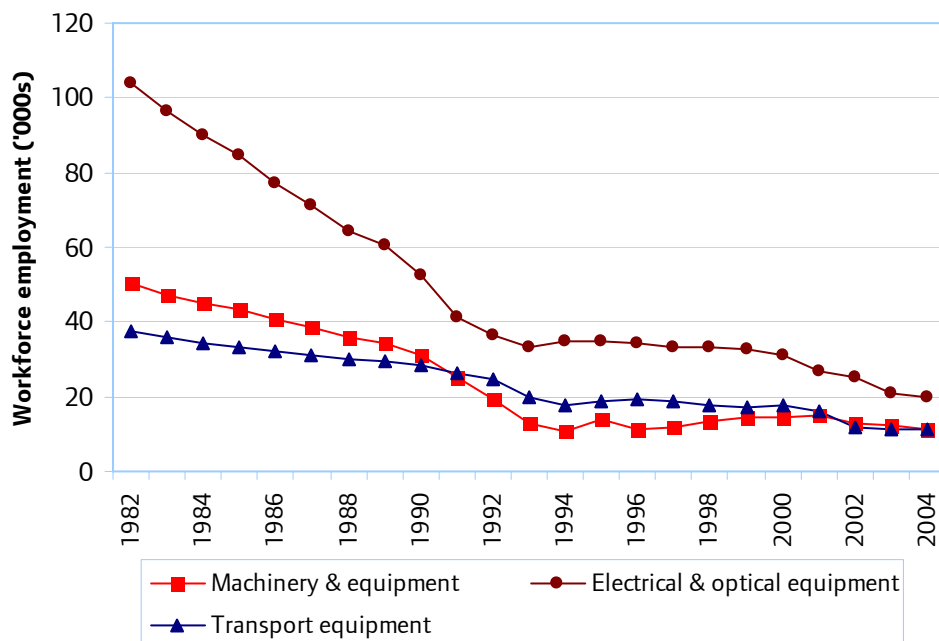
**Figure 4.2: Metals, minerals and chemicals workforce jobs, 1982 – 2004**



Source: EBS

Figure 4.2 shows that employment has fallen from 76,000 to just 15,000 in the manufacture of basic metals and fabricated metal products between 1982 and 2004. Employment in the chemicals sector, meanwhile, has declined from 45,000 to just 12,000 over the same period. The chemical sector includes the manufacture of paints, pesticides, pharmaceuticals, cleaning products and other chemical products.

**Figure 4.3: Engineering workforce jobs, 1982 – 2004**



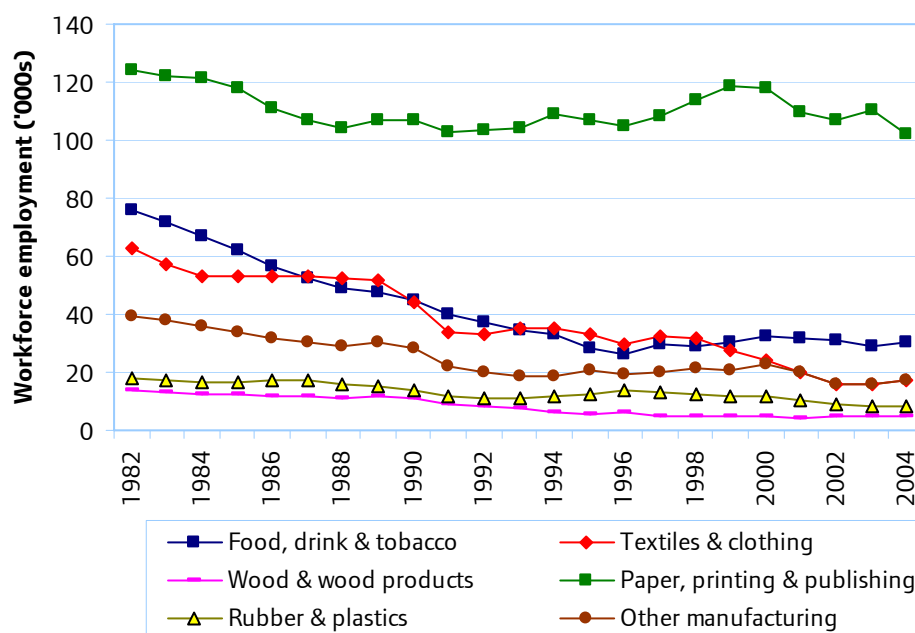
Source: EBS and Volterra

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Engineering jobs have similarly declined. Production of electrical and optical equipment, which includes the manufacture of office machinery and computers, electrical machinery, communication equipment, and medical and optical instruments has declined from over 100,000 to just 20,000 between 1982 and 2004. The declines have been less steep for machinery and for transport equipment but both these sectors now employ just 11,000 people each in London.

**Figure 4.4: Workforce jobs in other manufacturing sectors, 1982 – 2004**



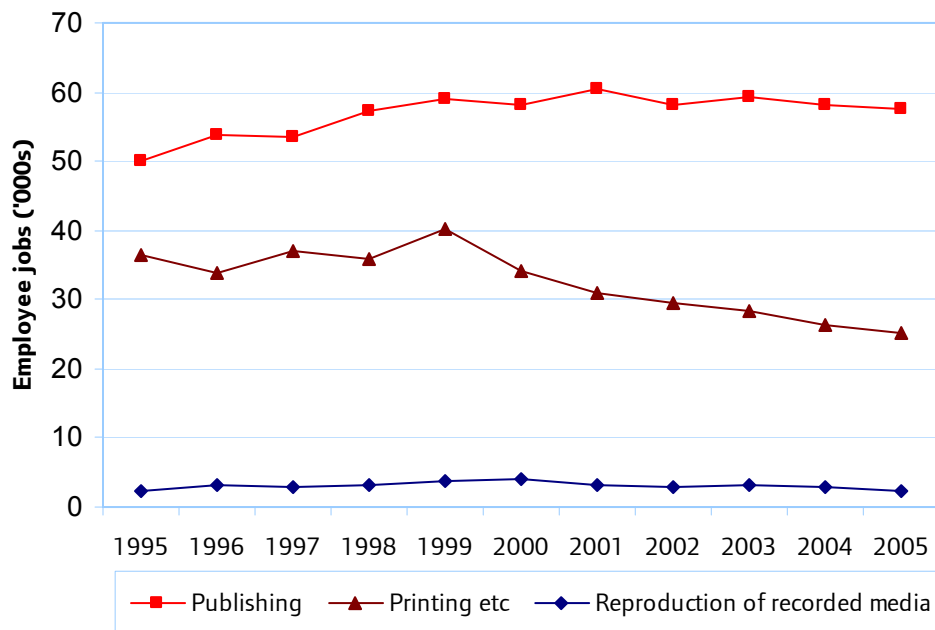
Source: EBS

Figure 4.4 shows that the textiles and clothing sector has also suffered a large loss in employment in London over the past two decades with fewer than 20,000 now employed in this sector. Indeed, there are only two manufacturing sectors that still employ more than 20,000 people. These are the paper, printing and publishing sector and the food, drink and tobacco sector.

The food, drink and tobacco sector has seen employment stabilise at around 30,000 employees over the past decade, having previously witnessed large declines. This stabilisation of employment is probably linked to the large rise in the amount of 'ready-made' meals (e.g. pre-packed sandwiches) being purchased in London as well as being supplied for airlines and other services.

In terms of publishing and printing, as Figure 4.5 shows, the number of employee jobs in publishing has risen to approximately 60,000 over the past decade whilst employee jobs in printing have declined to below 30,000.

**Figure 4.5: Employee jobs in publishing and printing, 1995 – 2005**



Source: ABI

### Employment specialisations

Table 4.1 supports the findings in the employment trends chart that publishing is the only sector within manufacturing in which London has a specialisation. As noted earlier this is because it is more closely linked to the media activities in 'Other Services' (see p. 56) than to manufacturing.

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**Table 4.1: Manufacturing - London share of GB employee jobs, 2005**

|  | London<br>employee<br>jobs | London<br>share of GB<br>employee<br>jobs | Index of<br>specialisation |
|--|----------------------------|---|----------------------------|
| Manufacturing  | 204,500                    | 7%  | 0.42                       |
|  |                            |   |                            |
| Metals   | 10,900                     | 3%  | 0.16                       |
| Chemicals  | 9,100                      | 5%  | 0.28                       |
| Minerals   | 2,800                      | 3%  | 0.16                       |
| Fuel refining  | 200                        | 1%  | 0.05                       |
|  |                            |   |                            |
| Electrical & optical equipment                       | 15,200                     | 5%  | 0.28                       |
| Machinery & equipment                                | 9,400                      | 4%  | 0.20                       |
| Transport equipment                                  | 8,800                      | 3%  | 0.16                       |
|  |                            |   |                            |
| Food, drink & tobacco                                | 28,000                     | 7%  | 0.41                       |
| Textiles & clothing                                  | 10,900                     | 9%  | 0.55                       |
| Other manufacturing                                  | 10,200                     | 7%  | 0.40                       |
| Rubber & plastics                                    | 6,600                      | 4%  | 0.21                       |
| Wood & wood products                                 | 3,100                      | 4%  | 0.24                       |
| pulp & paper   | 2,200                      | 3%  | 0.17                       |
| Recycling  | 1,800                      | 11%                                       | 0.66                       |
|  |                            |   |                            |
| Publishing   | 57,700                     | 38%                                       | 3.49                       |
| Printing and services activities related to printing | 25,200                     | 16%                                       | 1.06                       |
| Reproduction of recorded media                       | 2,200                      | 41%                                       | 3.81                       |

*Source: ABI**Note: Employee data is rounded to the nearest 100*

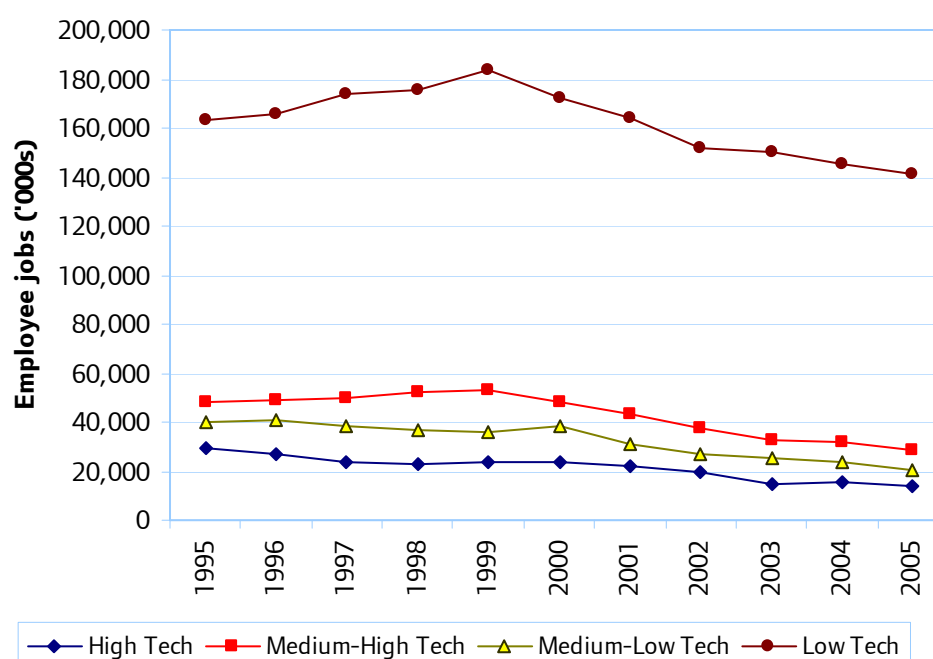
Aside from publishing and the related sectors of printing and reproduction of recorded media, there is no other sector in manufacturing to which London has anything approaching a specialisation as shown by the fact that the index of specialisation is below 0.66 in all cases.

**Note on employment in manufacturing based on technology**

Manufacturing can be split depending on the levels of technology used. Eurostat and the Organisation of Economic Co-operation and Development (OECD) have therefore introduced definitions of high-technology manufacturing, medium-high technology manufacturing, medium-low technology manufacturing and low-technology manufacturing based on a breakdown of the SIC codes. Figure 4.6 shows London's



manufacturing employment split between these categories and the trend in employment within each category since 1995.

**Figure 4.6: Manufacturing by technology, 1995 – 2005**

Source: ABI

In 2005, there were just 13,600 high technology manufacturing jobs in London, down from 29,000 in 1995. This means only seven per cent of London's manufacturing jobs are in the high-technology category.

A higher share (14 per cent) are in the medium-high technology category with 29,000 employee jobs in London (down from 48,000 in 1995). The medium-low technology sector had 21,000 jobs in 2004, ten per cent of total London manufacturing jobs.

However, more than two-thirds of London's manufacturing jobs exist in the low technology sector. In addition to including publishing, this sector includes the manufacture of food products and beverages, London's second largest manufacturing output. Table 4.2 shows manufacturing jobs in London split by technology category for 2005.

**Table 4.2: London employee jobs in manufacturing by technology, 2005**

|  |         |
|--|---------|
| High technology  | 13,600  |
| 33 : Manuf medical, precision instruments etc                              | 4,900   |
| 244 : Manuf of pharmaceuticals etc   | 2,900   |
| 32 : Manuf radio, tv/communications equipment                              | 2,400   |
| 30 : Manuf office machinery and computers                                  | 2,100   |
| 353 : Manuf of aircraft and spacecraft                                     | 1,300   |
|  |         |
| Medium-high technology   | 28,900  |
| 29 : Manuf machinery and equipment nec                                     | 9,400   |
| 24 : Manuf chemicals and chemical products excluding pharmaceuticals (244) | 6,200   |
| 34 : Manuf motor vehicles, trailers,etc                                    | 6,100   |
| 31 : Manuf electrical machinery/apparatus nec                              | 5,800   |
| 35 : Manuf other transport equipment excl aircraft (353) and boats (351)   | 1,300   |
|  |         |
| Medium-low technology  | 20,600  |
| 28 : Manuf fabricated metal products, etc                                  | 9,700   |
| 25 : Manuf rubber and plastic goods  | 6,600   |
| 26 : Manuf other non-metallic products                                     | 2,800   |
| 27 : Manuf basic metals  | 1,200   |
| 23 : Manuf coke, refined petroleum products                                | 200     |
| 351 : Building and repairing of ships/boats                                | 100     |
|  |         |
| Low technology   | 141,400 |
| 22 : Publishing, printing, repro recorded media                            | 85,100  |
| 15 : Manuf food products and beverages                                     | 27,900  |
| 36 : Manuf furniture; manufacturing nec                                    | 10,200  |
| 18 : Manuf apparel; dressing/dyeing fur                                    | 7,200   |
| 20 : Manuf wood/products/cork, etc   | 3,100   |
| 17 : Manuf textiles  | 2,800   |
| 21 : Manuf pulp, paper and paper products                                  | 2,200   |
| 37 : Recycling   | 1,800   |
| 19 : Tanning/dressing of leather, etc                                      | n.a.    |
| 16 : Manuf tobacco products  | n.a.    |

Source: ABI

Definitions: Eurostat, OECD

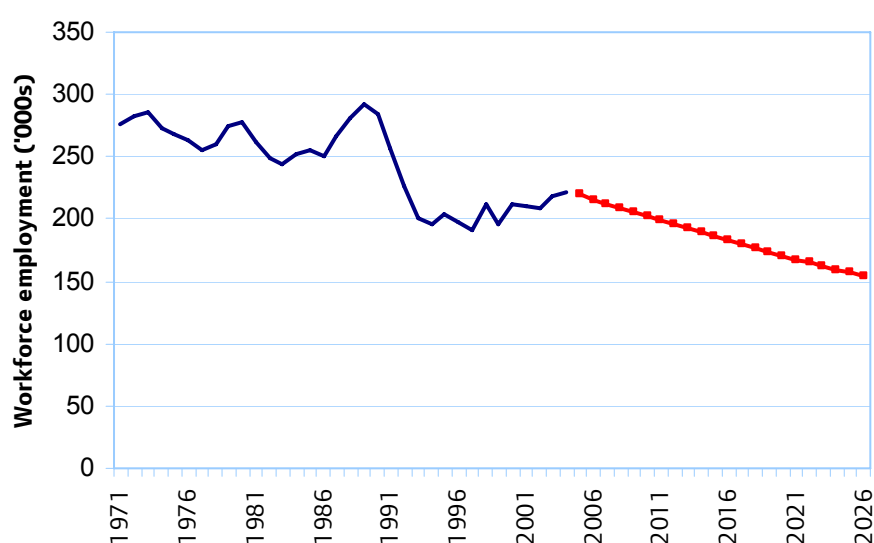
## 5. Construction

Construction is Section F of the SIC.

### Employment trends

The number of workforce jobs in construction in London has declined from around 280,000 in the early 1970s to 220,000 in 2004. There was a particularly sharp contraction in employment in the early 1990s. Looking ahead, employment in construction is expected to continue its gradual long-term decline and is forecast to fall to 150,000 workforce jobs by 2026.

**Figure 5.1: Construction workforce employment, 1971 – 2026**



Source: EBS and Volterra

Assessing employment in construction is complicated by the fact that almost half of people employed in the construction sector are self employed. This means that they do not appear in the ABI survey of employees. Therefore, Figure 5.2 which is based on ABI data can only be viewed as a partial picture of the type of employment within the construction sector as it only includes employee jobs and excludes the self-employed.<sup>3</sup>

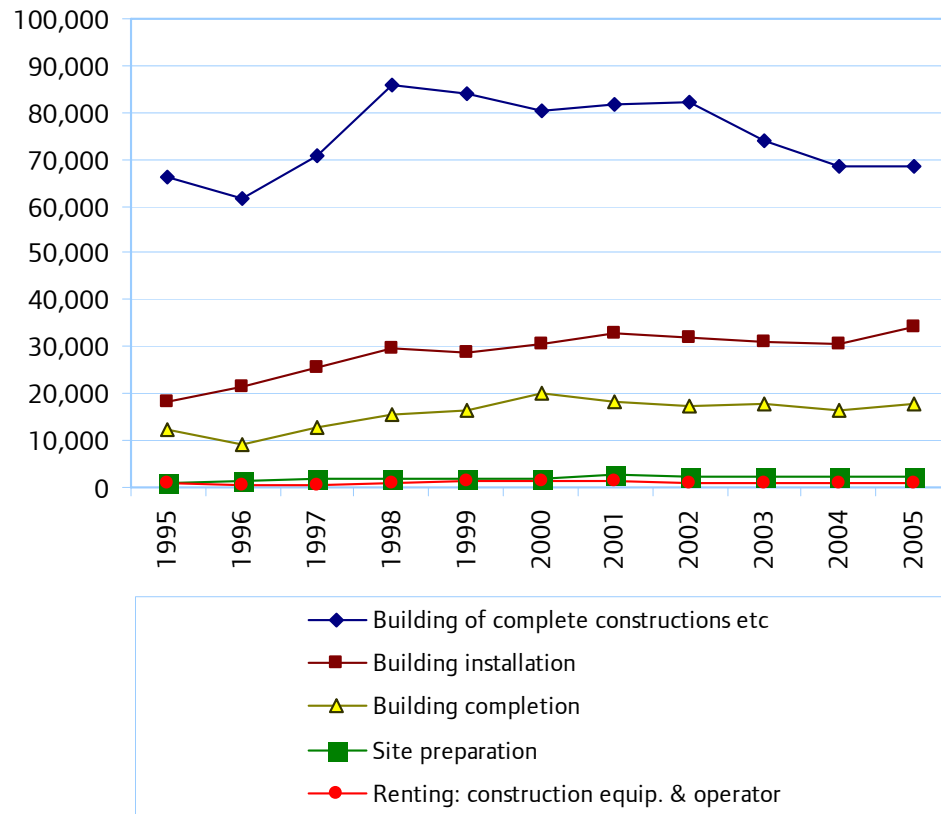
What is shown in Figure 5.2 however is an increase in employment in 'building installation'. This category includes electricians and plumbers. 'Building completion', meanwhile, consists of jobs in plastering, joinery, painting, floor tiling etc.

The majority of employment shown in Figure 5.2 is employment in 'building of complete constructions and civil engineering'. This includes construction of commercial as well as

<sup>3</sup> For a full review of the construction sector, see GLA Economics, 2006, Laying the foundations: London's construction industry

domestic buildings in addition to civil engineering projects such as roads, bridges, tunnels, sports facilities, sewers etc.

**Figure 5.2: Construction employee jobs, 1995 – 2005**



Source: ABI

### Employment specialisations

Table 5.1 shows that London has a relatively low share of employment in the construction sector. However, it must be noted that this table is based on ABI data and therefore excludes the very large amount of construction employment amongst the self-employed (both in London and in the rest of GB).

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**Table 5.1: Construction - London share of GB employee jobs, 2005**

|   | <b>London<br/>employee<br/>jobs</b> | <b>London share<br/>of GB<br/>employee jobs</b> | <b>Index of<br/>specialisation</b> |
|---|-------------------------------------|---|------------------------------------|
| 45 : Construction   | 123,300                             | 10%   | 0.62                               |
| 452 : Building of complete construction or parts thereof; civil engineering | 68,400                              | 10%   | 0.63                               |
| 453 : Building installation   | 34,100                              | 10%   | 0.64                               |
| 454 : Building completion   | 17,600                              | 10%   | 0.58                               |
| 451 : Site preparation  | 2,100                               | 11%   | 0.71                               |
| 455 : Renting of construction or demolition equipment with operator         | 1,000                               | 5%  | 0.29                               |

*Source: ABI*

Additionally, the construction workforce is a highly mobile workforce with many workers moving from project to project. Thus the amount of people working on construction projects in London is probably slightly higher than the above figures would suggest with workers who view their permanent workplace as outside of London working within London temporarily on certain projects.

## 6. Wholesale

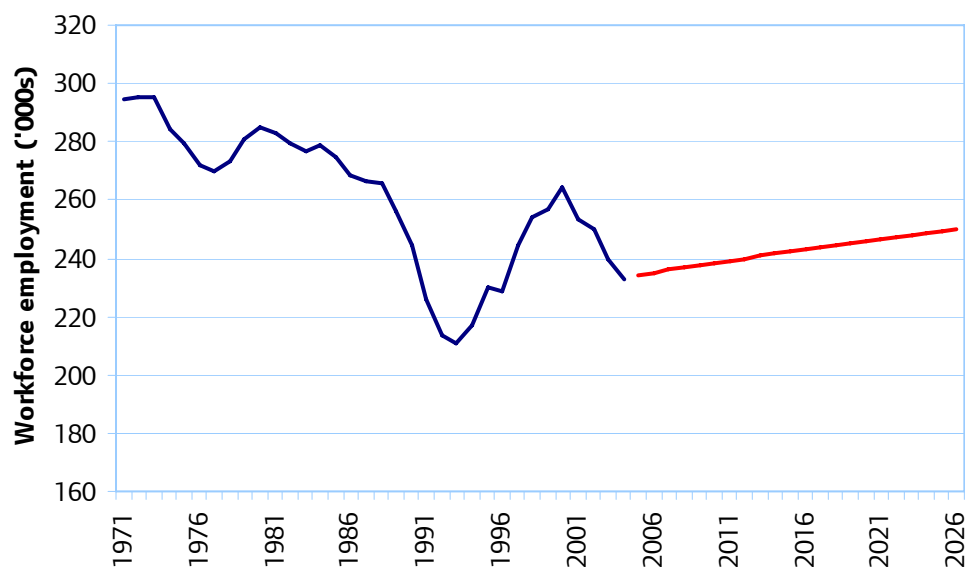
Wholesale makes up part of SIC G: Wholesale and Retail Trade; Repair of Motor Vehicles, Motorcycles and Personal and Household goods.

This section is the sum of SIC 50, which is the sale, maintenance and repair of motor vehicles, and SIC 51, which is the wholesale and commission trade.

### Employment trends

Employment in the 'Wholesale' sector in London has not followed a clear trend over the past three decades. Figure 6.1 shows that employment was on a gradual downward path up to the late 1980s at which time the decline in employment accelerated to a low point in 1993. Subsequently, however, employment increased up to 2000 but has subsequently declined again. In 2004, there were 233,000 employed in this sector in London.

**Figure 6.1: Wholesale workforce employment, 1971 – 2026**

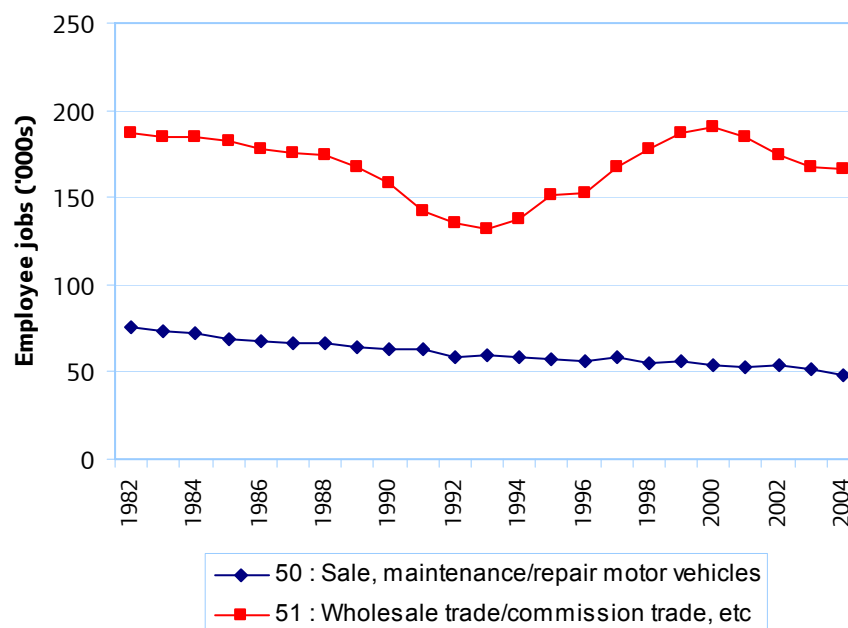


Source: EBS and Volterra

Looking ahead, employment in the sector is expected to show gradual growth up to an employment level of 250,000 by 2026.

As mentioned earlier, statistics on the 'wholesale' sector are actually the sum of SIC 50, which is the sale, maintenance and repair of motor vehicles, and SIC 51, which is the wholesale and commission trade. Figure 6.2 shows how the number of employee jobs in these two different areas has changed since 1982. It shows that employee jobs related to motor vehicles has declined from around 75,000 employee jobs in 1982 to just below 50,000 at the present time. Employee jobs in the wholesale and commission trade meanwhile have been more volatile within the range of 130,000 – 190,000.

**Figure 6.2: Wholesale – Employee jobs, 1982 – 2004**



Source: EBS

### ***Sale, maintenance and repair of motor vehicles***

According to ABI figures for 2005, there were approximately 17,000 employee jobs in London in the sale of motor vehicles, 16,000 in the maintenance and repair of motor vehicles, 8,500 in the sale of motor vehicle parts and 4,000 in the sale of automotive fuel. Additionally, there are around a 1,000 jobs in the sale and maintenance of motorcycles.

### **Wholesale trade/commission trade**

According to the definitions used in the SIC, wholesale trade and commission trade consists of the following:

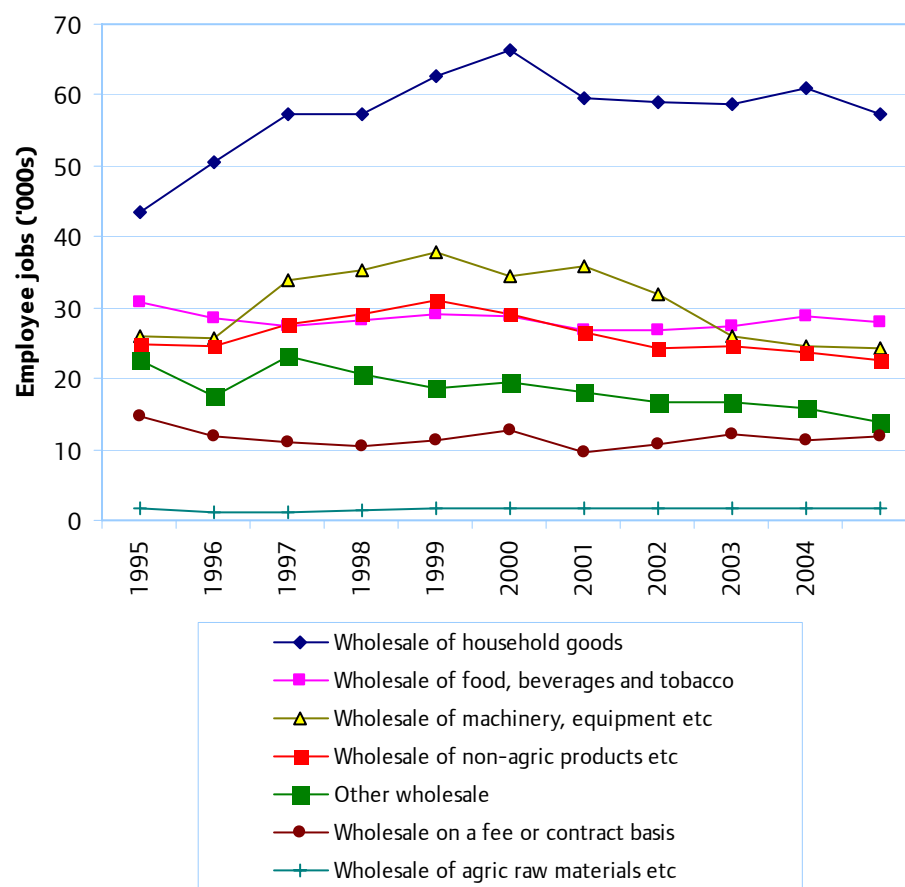
- 're-sale (sale without transformation) of new and used goods to retailers, industrial, commercial, institutional or professional users; or to other wholesalers; or acting as agents in buying merchandise for, or selling merchandise to, such persons or companies'
- 'activities of wholesale merchants, jobbers, industrial distributors, exporters, importers, co-operative buying associations, merchandise and commodity brokers, commission merchants and agents and assemblers, buyers and co-operative associations engaged in the marketing of farm products'
- 'the usual manipulations involved in wholesaling such as assembling, sorting and grading of goods in large lots, break bulks, re-packing and bottling, redistribution in smaller lots e.g. pharmaceuticals; storage, refrigeration, delivery and installation of goods on own account'.



Figure 6.3 examines London employment in the wholesale sector. It shows clearly that jobs in the wholesale sector relate to many different products and sectors of the economy. Thus, the largest category, in which there are approximately 60,000 London employee jobs, is the wholesale of household goods. These household goods include clothing, electricals, pharmaceuticals and cosmetics.

Figure 6.3 also shows around 30,000 jobs in the wholesale of food, beverages and tobacco and around 25,000 jobs in the wholesale of machinery (both for offices and industry) and also 25,000 jobs in the wholesale of non-agricultural products which mostly refers to products used in construction and industry.

**Figure 6.3: Wholesale employee jobs, 1995 – 2005**



Source: ABI

### Employment specialisations

London does not specialise in the sale and maintenance of motor vehicles. Just eight per cent of GB jobs in this sector are located in London giving an index of specialisation of 0.51. This relative lack of employment in this sector equates to the fact that London has a much lower rate of car-ownership than other parts of the country.

For the wholesale and commission trade, London has an index of specialisation of 0.93. In other words, there is a slightly lower share of total employment in this sector in

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London relative to the situation in the rest of GB. At lower levels of disaggregation it can be seen that London has a high share of jobs in the wholesale of household goods, but a low level of jobs in the wholesale of machinery and industrial products. This is consistent with the overall structure of London's economy.

**Table 6.1: Wholesale - London share of GB employee jobs, 2005**

|   | <b>London<br/>employee jobs</b> | <b>London share<br/>of GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|---|---------------------------------|---|------------------------------------|
| Wholesale   | 206,100                         | 12%   | 0.78                               |
| 51: Wholesale and commission trade  | 159,200                         | 14%   | 0.93                               |
| 514 : Wholesale of household goods  | 57,400                          | 21%   | 1.47                               |
| 513 : Wholesale of food, beverages and tobacco  | 27,800                          | 15%   | 0.94                               |
| 518 : Wholesale of machinery, equipment and supplies  | 24,200                          | 10%   | 0.62                               |
| 515 : Wholesale of non-agricultural intermediate products, waste and scrap                          | 22,500                          | 10%   | 0.60                               |
| 519 : Other wholesale   | 13,900                          | 15%   | 1.01                               |
| 511 : Wholesale on a fee or contract basis  | 11,700                          | 18%   | 1.23                               |
| 512 : Wholesale of agricultural raw materials and live animals                                      | 1,600                           | 8%  | 0.49                               |
| 50 : Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel | 46,800                          | 8%  | 0.51                               |
| 501 : Sale of motor vehicles  | 17,100                          | 7%  | 0.43                               |
| 502 : Maintenance and repair of motor vehicles  | 15,900                          | 9%  | 0.56                               |
| 503 : Sale of motor vehicle parts and accessories   | 8,500                           | 10%   | 0.61                               |
| 505 : Retail sale of automotive fuel  | 4,000                           | 8%  | 0.51                               |
| 504 : Sale, maintenance and repair of motorcycles and related parts and accessories                 | 1,200                           | 10%   | 0.63                               |

*Source: ABI*

Although not shown in Table 6.1, the wholesale of household goods category can be broken down further to decipher exactly where London's wholesaling specialisation occurs. Such analysis shows that London has 39 per cent of GB jobs in the wholesale of perfume and cosmetics, 26 per cent of GB jobs in the wholesale of clothing and 23 per cent in the wholesale of electrical household appliances.

## 7. Retail

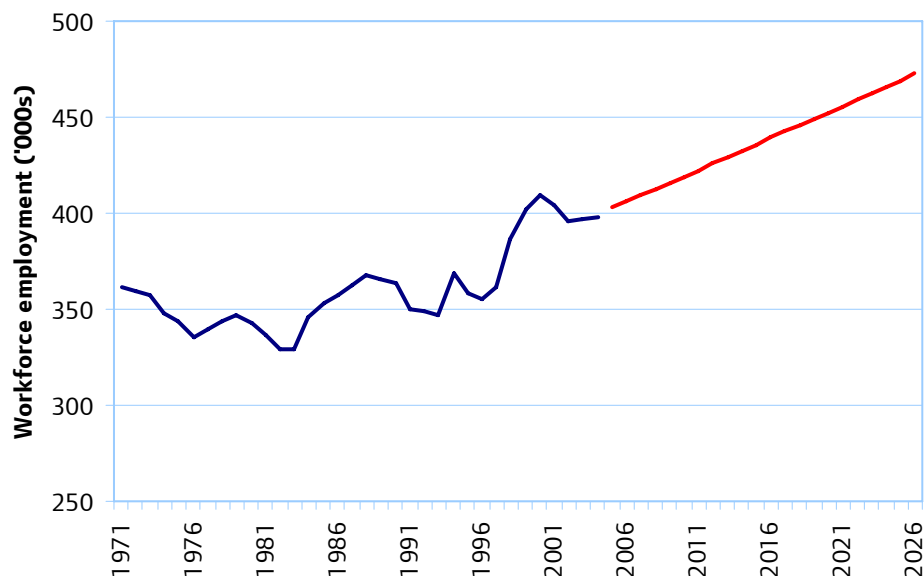
Retail makes up part of SIC G: Wholesale and Retail Trade; Repair of Motor Vehicles, Motorcycles and Personal and Household goods.

The retail sector is an important sector in terms of employment in London as it provides many part-time jobs as well as jobs for people without high skill levels<sup>4</sup>. The retail sector also includes some of London's largest employers, although the share of retail employment accounted for by supermarkets is lower in London than in the rest of GB.

### Employment trends

Employment in the retail sector has been on an upward trend in London through the past two decades. In 2004, there were 398,000 workforce jobs in the retail sector, an increase of 70,000 compared to the early 1980s.

**Figure 7.1: Retail workforce jobs, 1971 – 2026**



Source: EBS and Volterra

Looking ahead, employment in retail is expected to continue on an upward trend on the back of rising consumer incomes leading to rising consumer spending. Employment by 2026 is forecast at 473,000, an increase of 75,000 compared to 2004.

Employment in retail is split in the SIC between that which occurs in specialised stores and that which occurs in non-specialised stores.

<sup>4</sup> For more information on the labour market characteristics of retail, see GLA Economics, 2006, Retail in London: Working Paper E - Retail and the Labour Market

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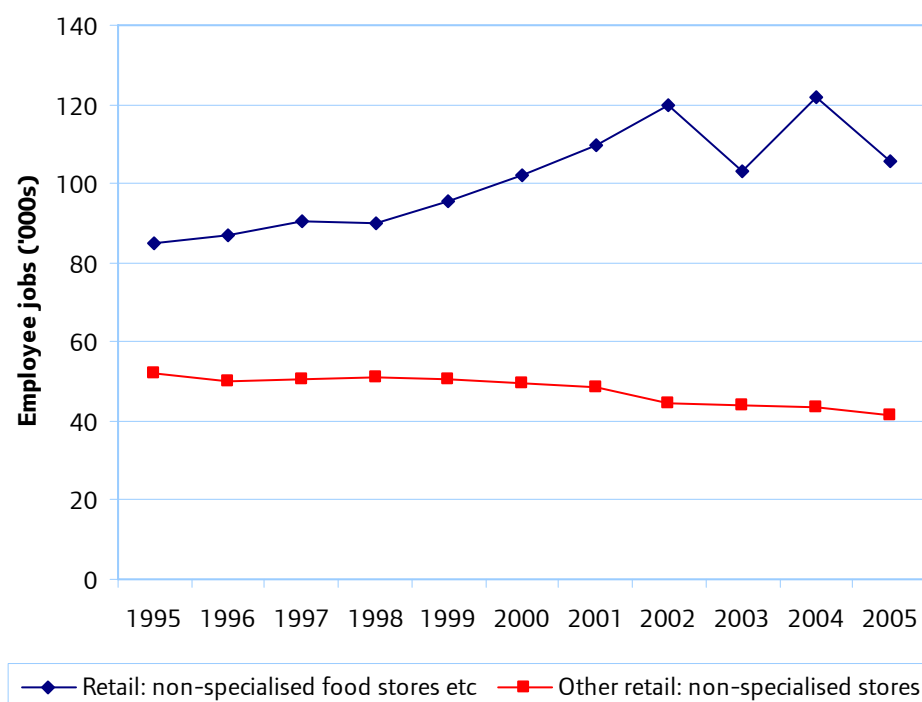
### ***Retail in non-specialised stores***

Retail in non-specialised stores basically consists of supermarkets and department stores, which are the main examples of stores that sell a wide-range of goods rather than just serving a specialist area.

Figure 7.2 shows employee jobs since 1995 in the non-specialised stores sector. SIC 5211 'Retail : non-specialised food stores' refers to supermarkets and in 2004 there were around 105,000 employee jobs in the supermarket sector, a total that has risen from around 85,000 in 1995.

Employment in department stores (SIC 5212 Other Retail: non-specialised stores) by contrast has declined over the past decade and currently equals around 41,000 employee jobs.

**Figure 7.2: Employee jobs in non-specialised retail (supermarkets and department stores), 1995 – 2005**

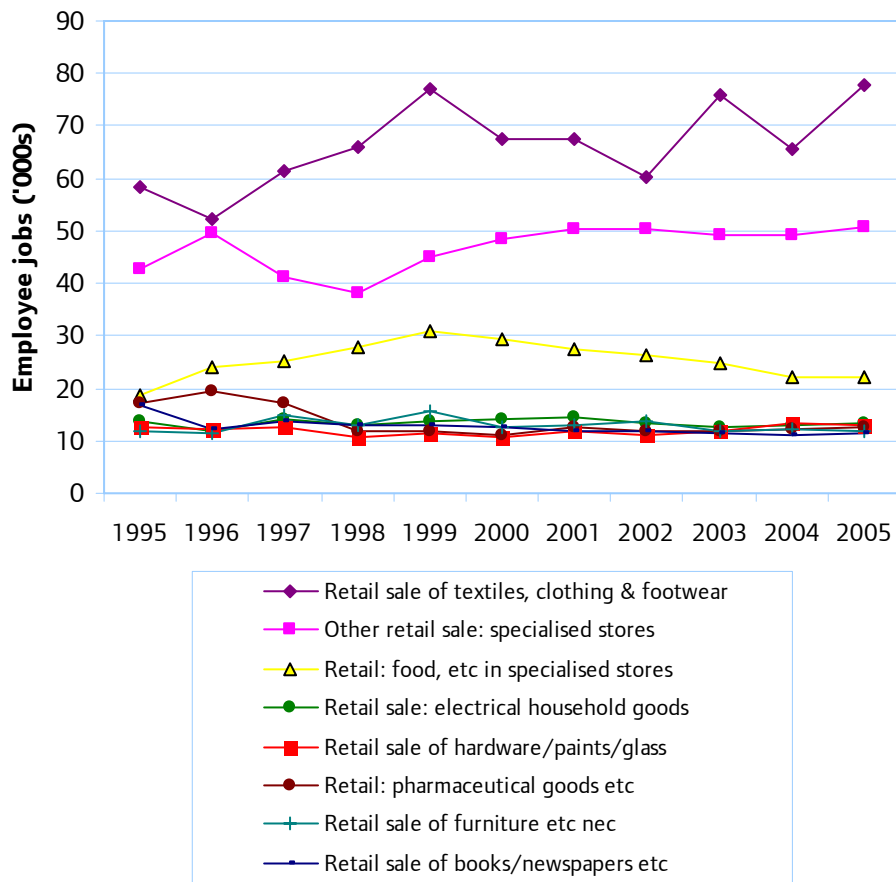


Source: ABI

### ***Retail in specialist stores***

This category includes a wide range of comparison retail stores. In total just over 210,000 employee jobs in London are to be found within these specialist stores.

**Figure 7.3: Employee jobs in specialised stores, 1995 – 2005**



Source: ABI

The largest sector of specialist stores is clothing shops, which are responsible for around 78,000 employee jobs in London. Specialist food shops (i.e. bakers, butchers, greengrocers etc) employ around 22,000. Hardware shops, electrical goods shops, chemists, furniture shops and bookshops/newsagents are additionally all responsible for in excess of 10,000 employee jobs (each). There are then a further 50,000 employee jobs in other types (not-specified) of specialist stores.

### Employment specialisations

The index of specialisation for retail in London is just 0.81. One reason for this being below 1.00 is that this index is calculated as the difference between retail's share of total employment in London and retail's share of total employment in the rest of GB. Because London has more jobs in other sectors (e.g. business services), then this leads to the share of total employment in retail in London being lower than the corresponding share in the rest of GB.

However, the index still seems quite low, particularly when the higher incomes of Londoners are taken into account. It suggests that the retail sector in London has room

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for further growth to more fully tap into London's potential retail market.<sup>5</sup> Meanwhile, for supermarkets the index of specialisation is even lower at 0.62, suggesting that they have not penetrated the retail landscape in London to quite the same degree as elsewhere in GB.

Amongst the various sectors of specialised retail, two areas in which London has an index of specialisation above 1.00 on 2005 data are for retail in clothing stores and in electrical stores.

**Table 7.1: Retail - London share of GB employee jobs, 2005**

|   | London<br>employee<br>jobs | London share<br>of GB<br>employee<br>jobs | Index of<br>specialisation |
|---|----------------------------|---|----------------------------|
| 52 : Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods | 375,700                    | 13%                                       | 0.81                       |
|   |                            |   |                            |
| 5211 : Retail sale in non-specialised stores with food, beverages or tobacco predominating          | 105,500                    | 10%                                       | 0.62                       |
| 5212 : Other retail sale in non-specialised stores  | 41,400                     | 15%                                       | 1.01                       |
|   |                            |   |                            |
| 5241-43 Retail sale of textiles, clothing, footwear and leather goods in specialised stores         | 77,800                     | 17%                                       | 1.10                       |
| 5248 : Other retail sale in specialised stores  | 50,900                     | 14%                                       | 0.87                       |
| 522 : Retail sale of food, beverages and tobacco in specialised stores                              | 22,100                     | 13%                                       | 0.81                       |
| 5246 : Retail sale of hardware, paints and glass  | 12,800                     | 11%                                       | 0.67                       |
| 5245 : Retail sale of electrical household appliances and radio and television goods                | 13,400                     | 17%                                       | 1.12                       |
| 523 : Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles                 | 12,500                     | 12%                                       | 0.73                       |
| 5244 : Retail sale of furniture, lighting equipment and household articles not elsewhere classified | 11,700                     | 13%                                       | 0.83                       |
| 5247 : Retail sale of books, newspapers and stationery  | 11,300                     | 14%                                       | 0.93                       |
|   |                            |   |                            |
| 525 : Retail sale of second-hand goods in stores  | 5,000                      | 21%                                       | 1.46                       |
| 526 : Retail sale of not in stores  | 9,300                      | 10%                                       | 0.64                       |
| 527 : Repair of personal and household goods  | 2,200                      | 9%  | 0.55                       |

Source: ABI

<sup>5</sup> An alternative explanation for the relatively low retail index of specialisation would be higher labour productivity in retail within London than elsewhere in GB such that higher retail sales are possible with fewer staff.

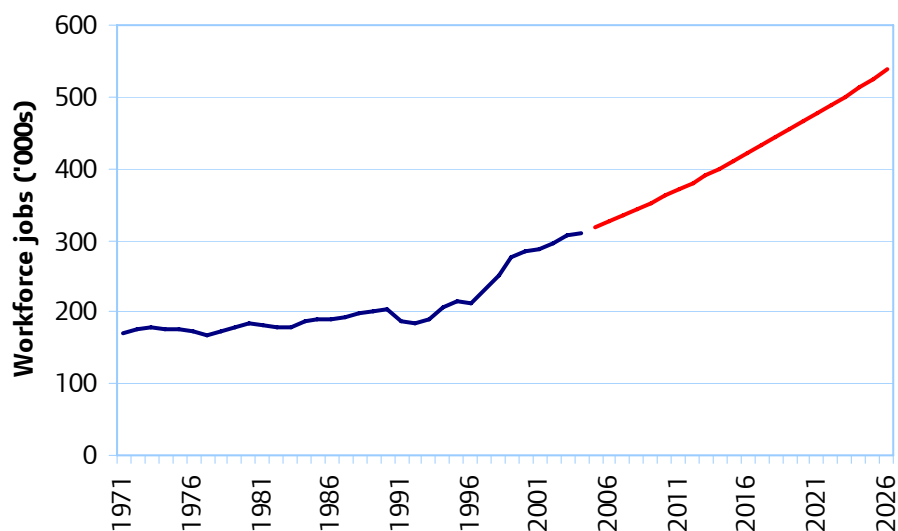
## 8. Hotels and restaurants

'Hotels and Restaurants' is Section H of the SIC. In addition to hotels and restaurants this sector of the SIC includes bars and catering.

### Employment trends

Employment in 'Hotels and Restaurants' has increased from 170,000 to 310,000 between 1971 and 2004 with the majority of the increase occurring over the past decade. This reflects the fact that expenditure on hotels, bars and restaurants has been increasing over time as consumer incomes increase. This is a process that is expected to continue and employment in this sector is expected to increase strongly to 2026 at which time employment is forecast to reach 539,000.

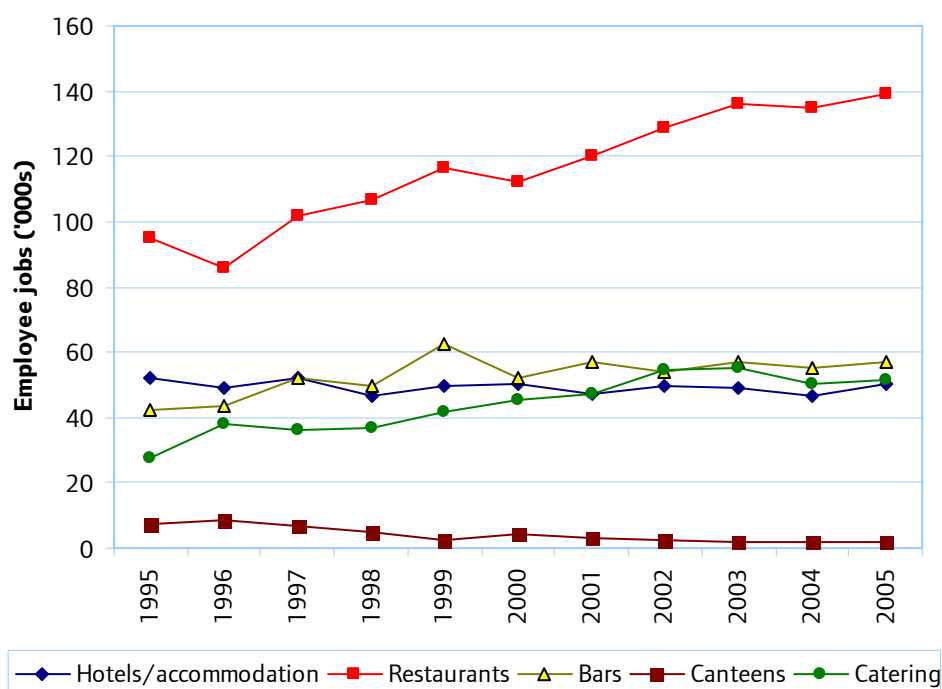
**Figure 8.1: 'Hotels and restaurants' workforce employment, 1971 – 2026**



Source: EBS and Volterra

Figure 8.2 shows the breakdown of employee jobs in this sector. The largest employment is found in restaurants with over 139,000 employee jobs existing in this sector. Furthermore, restaurants are the sector that has been showing most growth over the past decade as people increasingly choose to eat out rather than at home.

**Figure 8.2: Employee jobs in hotels, restaurants, bars and catering, 1995 – 2005**



Source: ABI

The rest of the employment is split more or less equally between bars, hotels and catering, with 57,000 employee jobs in bars and around 50,000 employee jobs in both hotels and catering. Like restaurants, demand for bars comes directly from consumers and rising consumer incomes helped employment in bars rise in the late 1990s although it subsequently appears to have stabilised. Employment in hotels has been relatively stable throughout the past decade.

Catering, meanwhile, has seen employment rise quite sharply over the past decade. Unlike restaurants, bars and hotels, catering is perhaps best considered as a business service profession. This is because much of the employment in catering is for the provision of catering services to offices and other employers across London rather than directly to consumers or tourists.

### Employment specialisations

As Table 8.1 shows London has a high share of GB jobs in restaurants, which must be representative of a greater propensity of Londoners to eat out (plus the impact of tourism). London also has a high share of employment in catering, in line with catering's role largely as a business service. Employment in bars, by contrast, is relatively low in London compared to other areas of GB.



**Table 8.1: Hotels and restaurants – London share of GB employee jobs, 2005**

|  | <b>London<br/>employee<br/>jobs</b> | <b>London<br/>share of GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|--|-------------------------------------|---|------------------------------------|
| 55 : Hotels and restaurants                            | 299,800                             | 17%   | 1.12                               |
| 551 : Hotels   | 47,500                              | 16%   | 1.02                               |
| 552 : Camping sites/ other short-stay<br>accommodation | 2,700                               | 5%  | 0.30                               |
| 553 : Restaurants                                      | 139,300                             | 23%   | 1.61                               |
| 554 : Bars   | 57,200                              | 10%   | 0.64                               |
| 555 : Canteens and catering                            | 53,100                              | 21%   | 1.45                               |

Source: ABI

## 9. Transport and communication

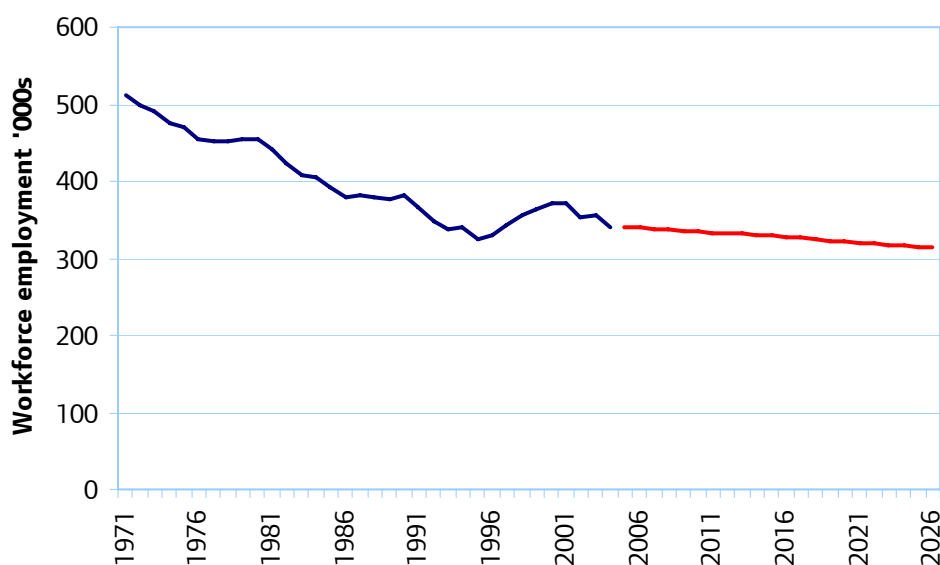
Transport and communication corresponds to Section I of the SIC, 'Transport, Storage and Communication'.

It includes employment in passenger transport, freight transport and related activities including employment in travel agencies. It also includes employment in postal and courier services as well as employment in telecommunications.

### Employment trends

As Figure 9.1 shows there has been a gradual downward trend in employment in transport and communication through the 1970s to the mid 1990s. After a small increase in employment in the late 1990s, the trend again appears downward at the present time. Employment in transport and communication is therefore expected to decline from the current level of 341,000 workforce jobs to 313,000 by 2026.

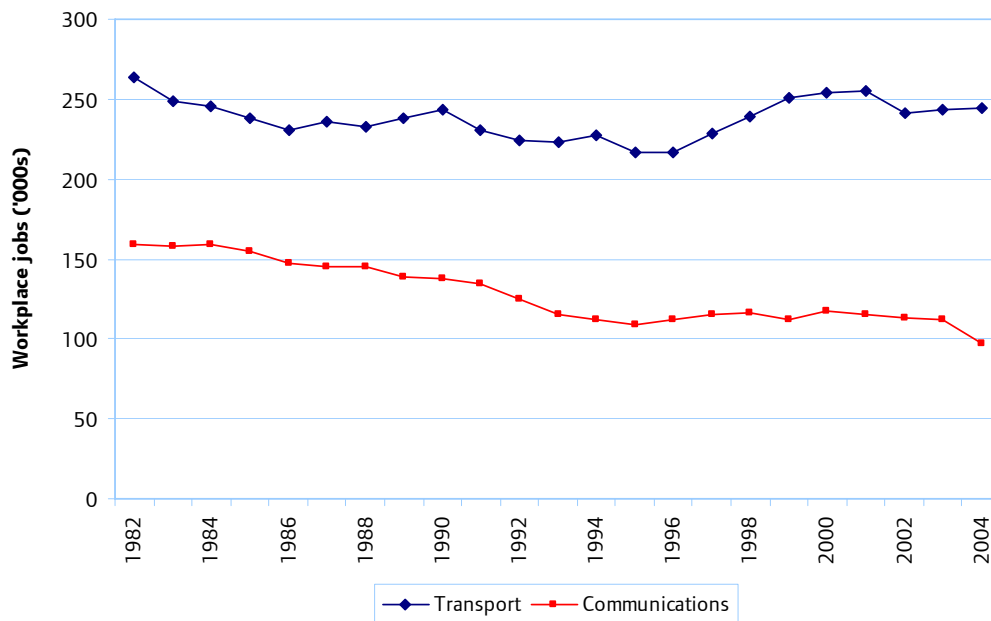
**Figure 9.1: Transport and communications workforce employment, 1971 – 2026**



Source: EBS and Volterra

Figure 9.2 shows that up to the mid 1990s there was a similar trend in both the transport sector and the communications sector with both having witnessed a decline of around 50,000 jobs from the early 1980s. However, whilst the communications sector has continued to slowly contract, the transport sector recovered much of this loss through the late 1990s and early 2000s.

**Figure 9.2: Transport and communications workforce employment, 1982 – 2004**

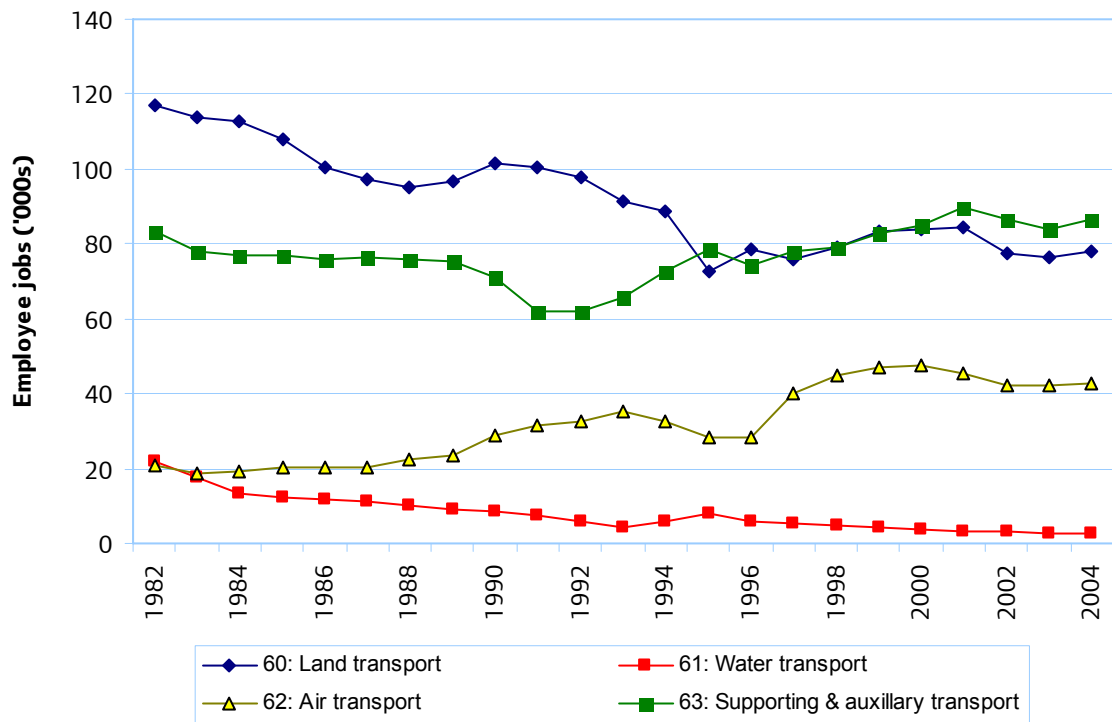


Source: EBS

### Transport

Figure 9.3 shows that much of the increase in transport employment over recent decades has been in air transport. Land and water transport by contrast have seen declines in employment.

**Figure 9.3: Employee jobs in transport and communications, 1982 – 2004**



Source: EBS

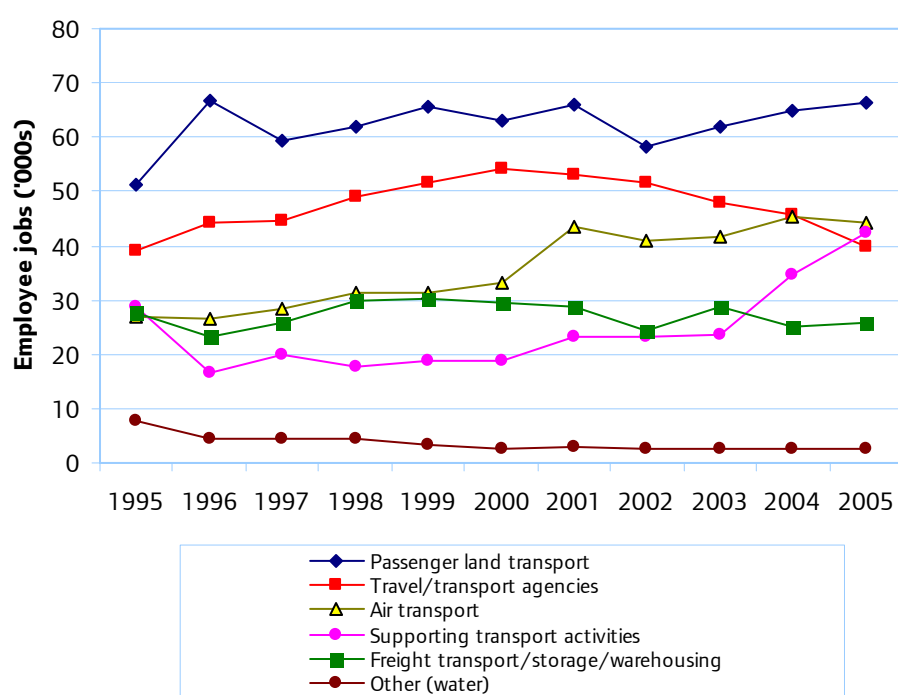
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Understanding in depth the trends in the transport sector is made difficult by the groupings in the SIC. For example activities of travel agencies are included in the SIC 63 category, but so is freight warehousing, whereas freight transport is in SIC 61 alongside passenger land transport etc.

Figure 9.4 cuts across the existing SIC categories to provide a more intuitive set of groupings to show existing employment in the transport sector<sup>6</sup>. The largest employment sector in transport is therefore shown to be passenger land transport with 67,000 employee jobs spread across employment on buses, trains, taxis etc.

**Figure 9.4: Employee jobs in transport, 1995 – 2005**



Source: ABI

There are around 45,000 people employed in air transport, a sector in which employment has been expanding, and around 40,000 people employed in travel and other transport agencies. Freight transport, storage and warehousing employs around 26,000 people. Additionally, around 43,000 are employed in 'Other supporting transport activities', which includes operation of terminal facilities such as train and bus stations and airports etc.

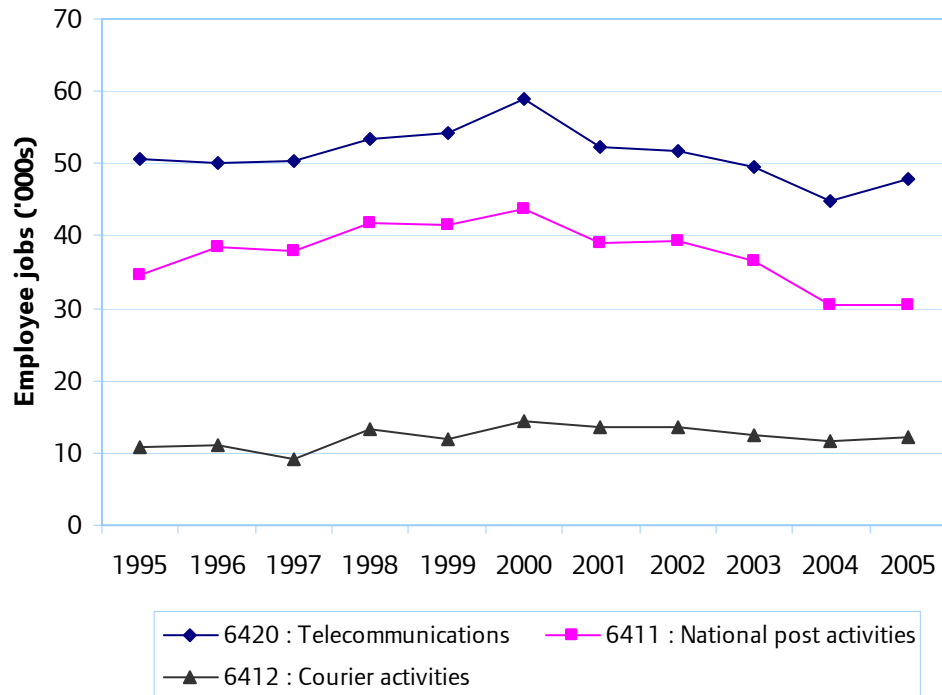
## Communications

Telecommunications – which includes the transmission of sound, images, data or other information via cables, broadcasting, relay or satellite – contributes around 45,000

<sup>6</sup> Definitions: Passenger Transport – SIC 6010, 6021, 6022, 6023. Travel & Transport Agencies – SIC 633, 634. Air Transport – SIC 62. Supporting Transport Activities – SIC 632. Freight Transport/Storage/Warehousing – SIC 6024, 6311, 6312. Other (water) – SIC 61, 6030.

employee jobs in London (see Figure 9.5). A further 40,000 employee jobs exist in either postal or courier activities. As Figure 9.3 shows, jobs in this post and telecommunications category have been declining gradually throughout the past two decades.

**Figure 9.5: Employee jobs in post and telecommunications, 1995 – 2005**



Source: ABI

### Employment specialisations

An index of specialisation of 1.35 for the 'Transport and Communication' sector shows that London does have a high proportion of GB's jobs in a number of aspects of transport and communication.

For transport, London's major specialisation is in Air Transport, with half of all GB jobs located in the capital city. London also has in excess of 20 per cent of GB jobs in passenger land transport (due to its large public transport network), travel/transport agencies and supporting transport activities.

However, London only has six per cent of GB's employment in logistics (freight transport/storage/warehousing) showing that any specialisation in this sector within GB occurs outside of London.

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**Table 9.1: Transport and communication – London share of GB employee jobs, 2005**

|   | <b>London<br/>employee<br/>jobs</b> | <b>London<br/>share of GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|---|-------------------------------------|---|------------------------------------|
| Transport & communication                                     | 312,100                             | 20%   | 1.35                               |
|   |                                     |   |                                    |
| Transport   | 221,600                             | 21%   | 1.43                               |
| Passenger land transport                                      | 66,500                              | 26%   | 1.97                               |
| Travel/transport agencies                                     | 40,000                              | 22%   | 1.59                               |
| Air transport   | 44,100                              | 50%   | 5.63                               |
| Supporting transport activities                               | 42,500                              | 34%   | 2.85                               |
| Freight transport/storage/warehousing                         | 25,900                              | 6%  | 0.37                               |
| Other (water)   | 2,600                               | 13%   | 0.84                               |
|   |                                     |   |                                    |
| Communications  | 90,500                              | 18%   | 1.21                               |
| 6420 : Telecommunications                                     | 47,800                              | 22%   | 1.55                               |
| 6411 : National post activities                               | 30,600                              | 14%   | 0.93                               |
| 6412 : Courier activities other than national post activities | 12,200                              | 16%   | 1.06                               |

*Source: ABI*

In communications, London does have some specialisation in telecommunications with 22 per cent of GB jobs in this sector located in London.

## 10. Financial services

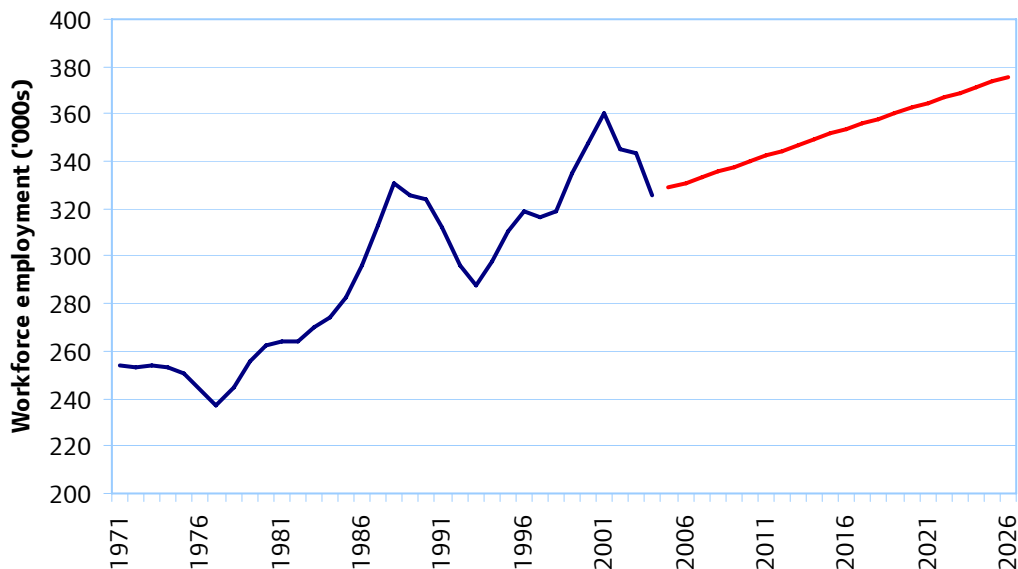
Financial services corresponds to Section J of the SIC 'Financial Intermediation'.

Financial services are a key sector for London. Whilst they are only a moderate employer in terms of numbers of people, they are nevertheless a sector which attracts significant income into London and creates a large demand for other related jobs in business services.

### Employment trends

Figure 10.1 shows that employment in financial services, whilst cyclical, has shown moderate growth since the late 1970s. Currently, there are around 325,000 workforce jobs in financial services within London and this is expected to increase further to approximately 380,000 by 2026.

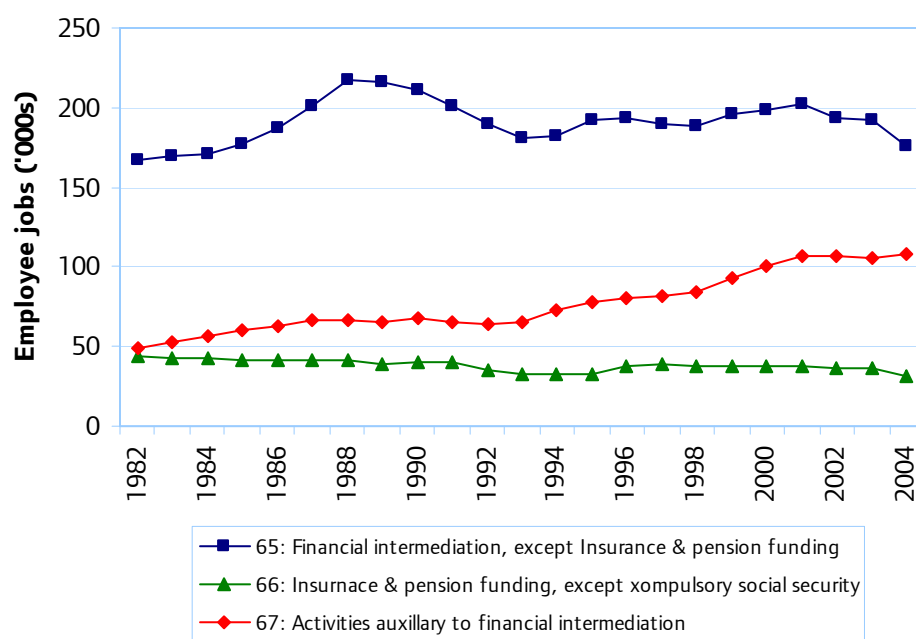
**Figure 10.1: Financial services workforce employment, 1971 – 2026**



Source: EBS and Volterra

The SIC splits employment in financial services into three groups. The first of these is financial intermediation (banking). The second group is insurance funding. The final group consists of activities auxiliary to the first two groups i.e. to both financial intermediation and insurance funding.

**Figure 10.2: Employee jobs in financial services, 1982 – 2004**



Source: EBS

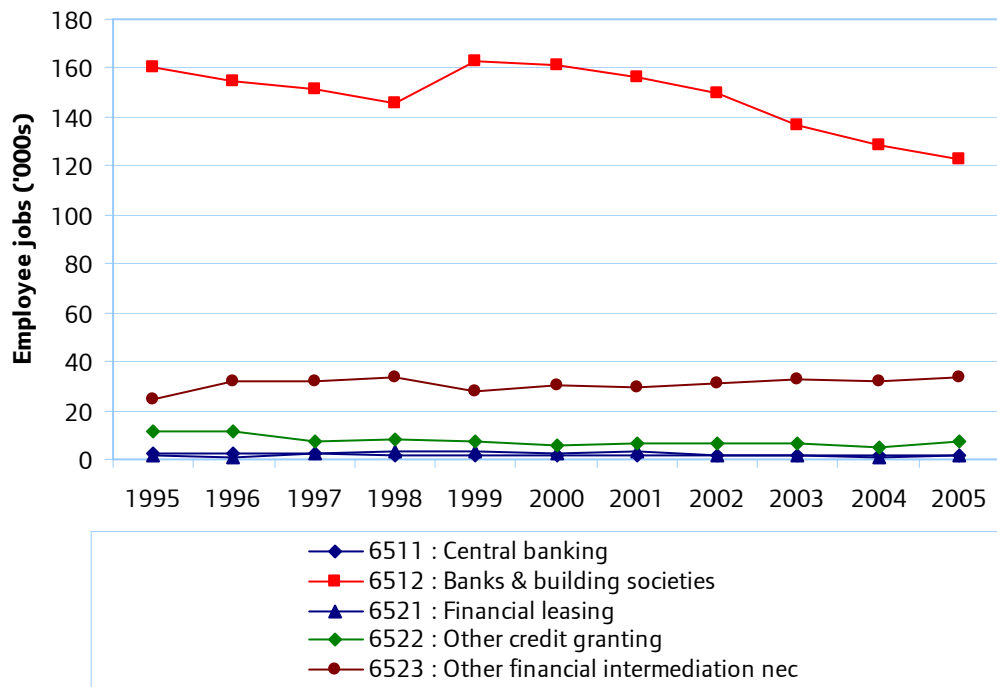
Figure 10.2 shows that the majority of employment in financial services is in the financial intermediation (banking) sector. However, most growth over the past two decades has come in the 'activities auxiliary' sector. Further explanation of what each of these groupings consists of follows.

### **Financial intermediation, except insurance and pension funding**

Financial intermediation is the activity of obtaining and redistributing funds. The majority of employment with this sector is employment at banks and building societies (SIC 6512). Indeed, there were 123,000 employee jobs in London in 2005 concerned with financial intermediation at banks and building societies, making up over 39 per cent of London's total employment in financial services. Nevertheless, employee jobs in financial intermediation have been declining over much of the past decade and are currently almost 40,000 below the levels seen in 1995 and 1999.



**Figure 10.3: Employee jobs in financial intermediation, 1995 – 2005**

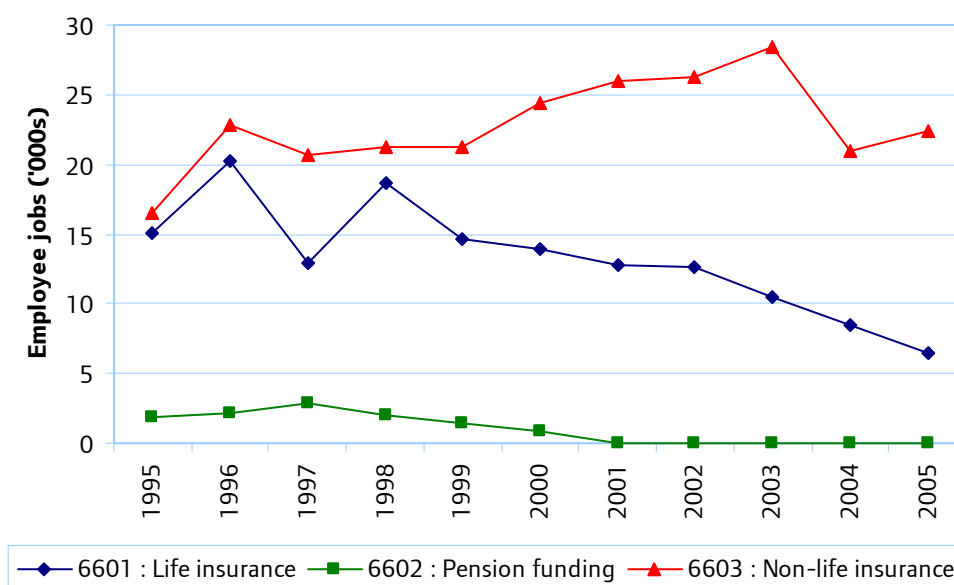


Source: ABI

There are a further 33,000 employee jobs in London under the category 'Other financial intermediation not elsewhere classified' (SIC 6523) which is defined as 'other financial intermediation primarily concerned with distributing funds other than by making loans'. Security dealing on own account is a significant employer in this sector as is employment in venture and development capital companies. Employment in this grouping also exists in investment trusts, unit trusts and property unit trusts and bank holding companies.

### **Insurance and pension funding, except compulsory social security (SIC 66)**

The insurance sector provides around 29,000 employee jobs across London. Just 6,500 are employed in life-insurance with the remainder employed in providing insurance in other areas such as health, property, transport etc.

**Figure 10.4: Employee jobs in Insurance and pension funding, 1995 – 2005**

Source: ABI

Additionally, there are around 38,000 employee jobs in activities auxiliary to insurance, which is discussed under the SIC 67 code.

### Activities auxiliary to financial intermediation (SIC 67)

As Figure 10.2 showed, within the financial services sector it is SIC67: 'Activities auxiliary to financial intermediation' that has shown growth in employment over the past two-decades. This sector consists of the provision of services involved in or closely related to financial intermediation, but not themselves involving financial intermediation.

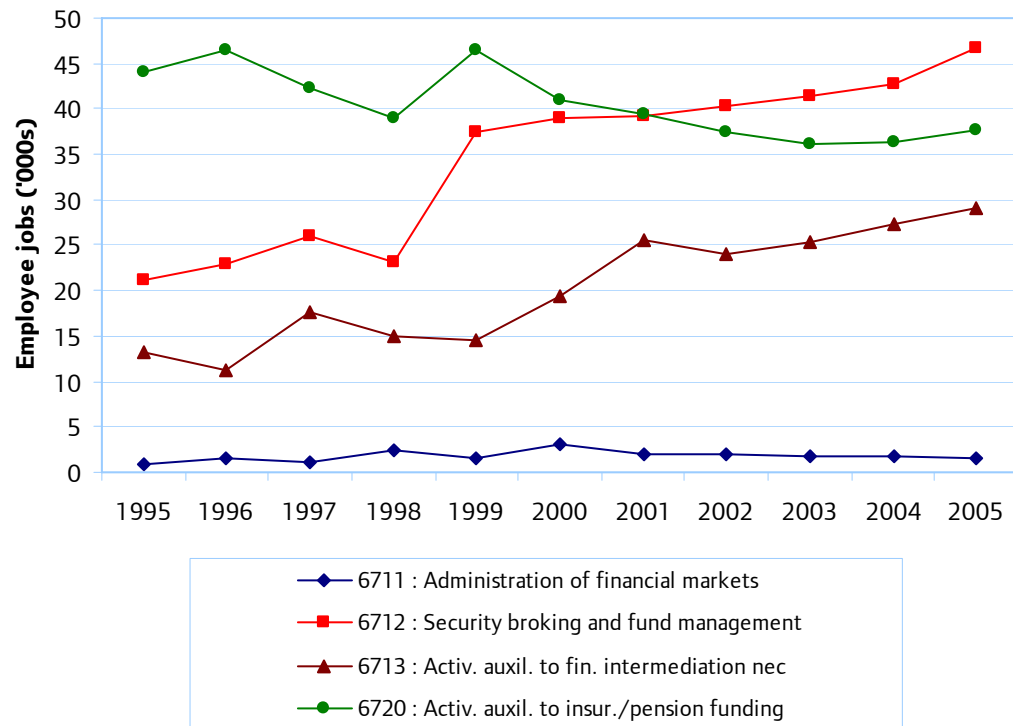
As mentioned earlier there are around 38,000 employee jobs in this sector related to insurance (SIC 6720). In particular, this employment consists of the activities of insurance agents, brokers, risk and damage evaluators and the activities of Lloyd's underwriting brokers as well as managers and agents of Lloyd's syndicates. It should be noted, however, that employment related to insurance has declined in London over the past decade.

By contrast, employment in activities auxiliary to financial intermediation (SIC 6713) has increased with 29,000 employee jobs in this sector in 2005 in occupations as diverse as mortgage brokers and bureaux de change.

The biggest employment sector within the SIC 67 category, however, is in security broking and fund management. The number of employee jobs in these areas having risen to over 46,000 in London by 2005, having more than doubled over the past decade. Fund management consists of portfolio management services provided by fund managers on behalf of clients, including decisions about the content of the portfolios.

Security broking and related activities consists of dealing in financial markets on behalf of others (e.g. stock broking) and related activities other than fund management.

**Figure 10.5: Employee jobs in activities auxiliary to financial intermediation, 1995 – 2005**



Source: ABI

### Employment specialisations

Financial services is a key specialisation for London with 30 per cent of GB jobs in this sector. The key sectors of specialisation are financial intermediation (banking) with 28 per cent of GB jobs and activities auxiliary to financial intermediation in which London has 42 per cent of GB jobs. A particular specialism within this latter sector is security broking and fund management (with 73 per cent of GB employment located in London).

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**Table 10.1: Financial Services – London share of GB employee jobs, 2005**

|  | <b>London<br/>employee<br/>jobs</b> | <b>London<br/>share of<br/>GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|--|-------------------------------------|---|------------------------------------|
| Financial Services   | 310,700                             | 30%   | 2.32                               |
|  |                                     |   |                                    |
| 65 : Financial intermediation, except insurance and pension funding              | 166,600                             | 28%   | 2.13                               |
| 6512 : Other monetary intermediation   | 123,100                             | 26%   | 1.91                               |
| 6523 : Other financial intermediation not elsewhere classified                   | 33,200                              | 70%   | 13.14                              |
| 6522 : Other credit granting   | 7,200                               | 11%   | 0.68                               |
| 6511 : Central banking   | n.a.                                | 89%   | -                                  |
| 6521 : Financial leasing   | n.a.                                | 30%   | 2.37                               |
|  |                                     |   |                                    |
| 66 : Insurance and pension funding, except compulsory social security            | 28,900                              | 16%   | 1.08                               |
| 6603 : Non-life insurance  | 22,400                              | 22%   | 1.55                               |
| 6601 : Life insurance  | 6,500                               | 9%  | 0.53                               |
|  |                                     |   |                                    |
| 67 : Activities auxiliary to financial intermediation                            | 115,200                             | 42%   | 3.95                               |
| 6712 : Security broking and fund management                                      | 46,800                              | 73%   | 14.66                              |
| 6720 : Activities auxiliary to insurance and pension funding                     | 37,700                              | 28%   | 2.17                               |
| 6713 : Activities auxiliary to financial intermediation not elsewhere classified | 29,100                              | 39%   | 3.48                               |
| 6711 : Administration of financial markets                                       | 1,600                               | 55%   | 6.78                               |

*Source: ABI*

Whilst banking and its related sectors are areas in which London clearly specialises in comparison to the rest of the country, it is not the same for insurance. The index of specialisation of 1.08 for employment in insurance shows that there is no overall specialisation in this area, with this particularly true of life insurance where the index of specialisation is just 0.53 showing that any GB specialism in this sector must be outside of London.

## 11. Business services

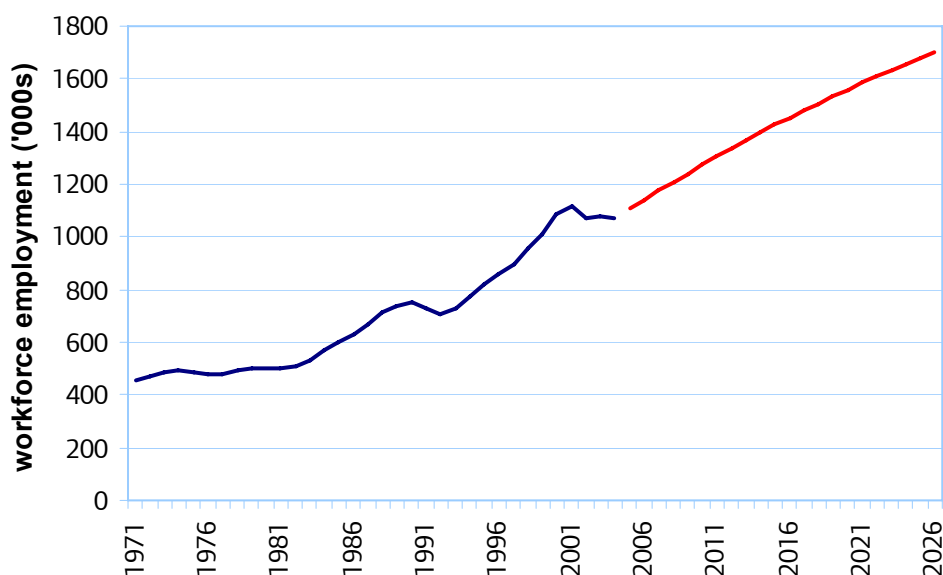
'Business Services' corresponds to Section K of the SIC 'Real Estate, Renting and Business Activities'.

Business services is a vitally important sector in the London economy, being both the largest sector and the one experiencing greatest growth over the past two decades. It includes some of the key high-value sectors in which London specialises such as legal services, accountancy and advertising. It also includes support business services such as industrial cleaning and additionally real estate activities.

### Employment trends

Workforce employment in 'business services' has risen from 457,000 in 1971 to 1.07 million in 2004. By 2026, 1.70 million people are expected to be employed in 'business services' within London.

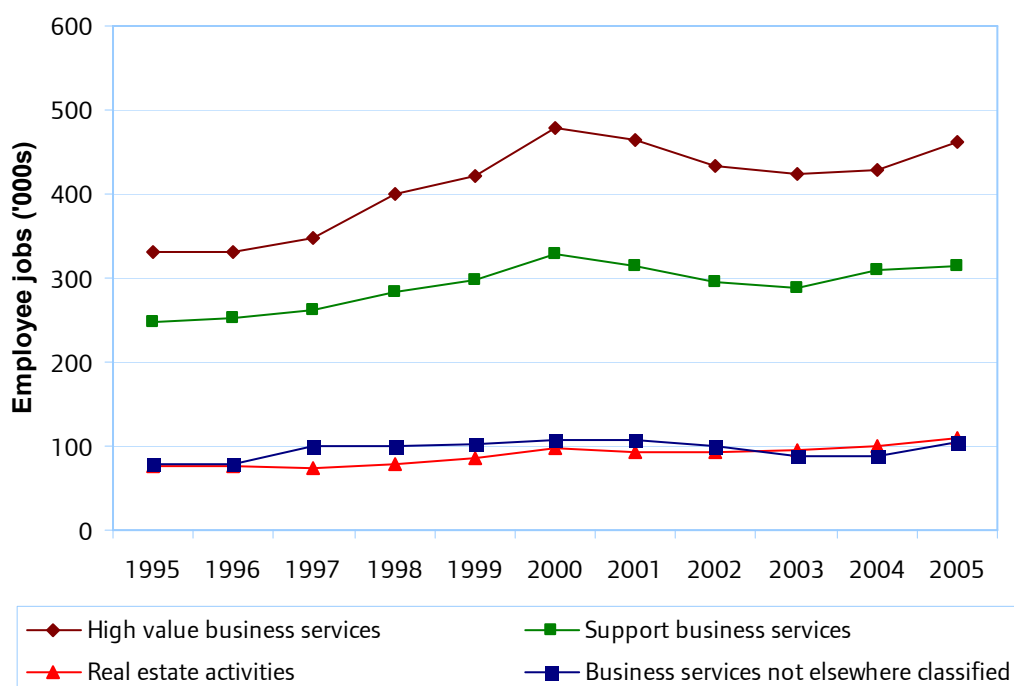
**Figure 11.1: Business services workforce employment, 1971 – 2026**



Source: EBS and Volterra

Sorting through the many different job categories within the 'business services' sector can be quite confusing with jobs as diverse as management consultancy and industrial cleaning all included within the sector. To simplify the analysis in this report, 'business services' have therefore been split into three main categories, one entitled 'high value business services', another entitled 'support business services' and a final category dealing with real estate. Figure 11.2 shows employee jobs within these categories since 1995 together with employee jobs in 'Other business services not elsewhere classified'.

**Figure 11.2: Employee jobs in business services, 1995 – 2005**



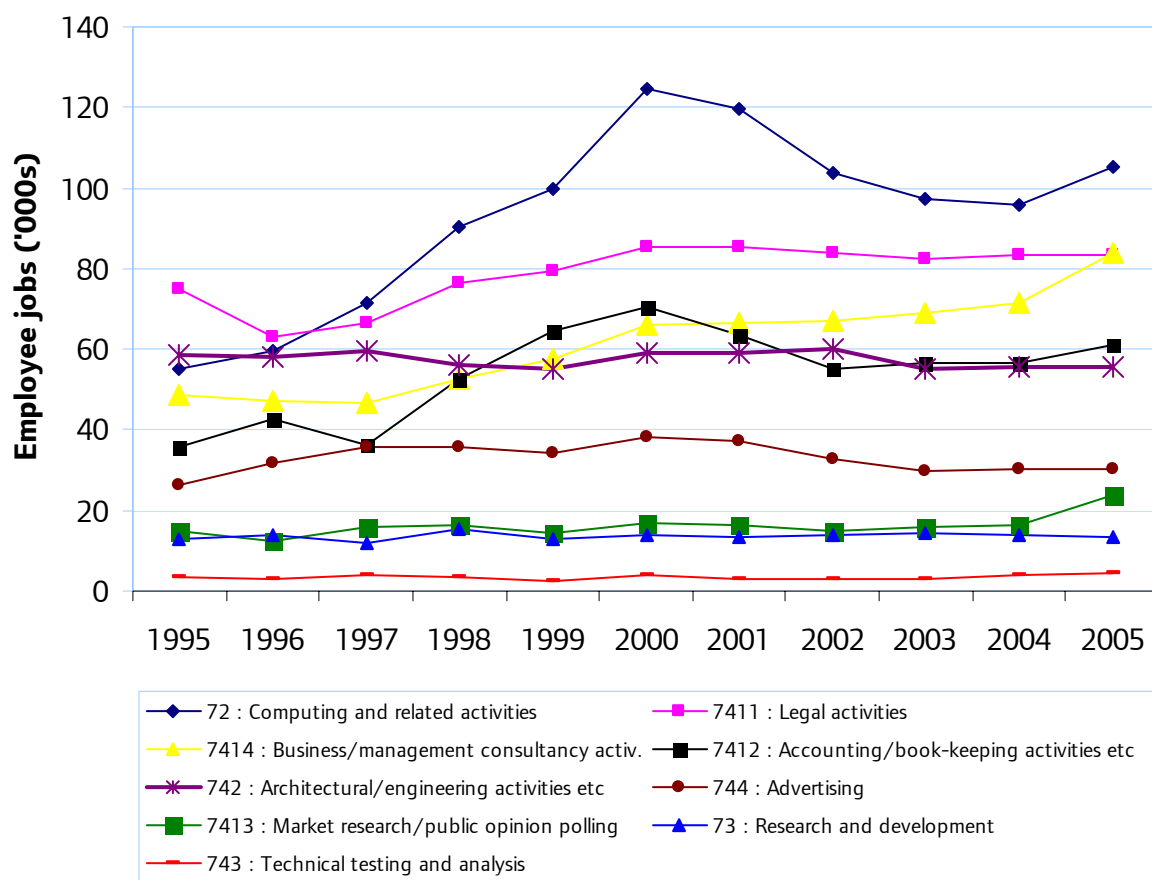
Source: ABI

### High value business services

High value business services are knowledge-based industries requiring highly qualified staff. Examples include IT, legal services, accountancy, management consultancy and advertising. Although firms in this area sell their services both to consumers and government, by far the largest demand for their services comes from other businesses. This demand may originate from other London firms, or alternatively from businesses located elsewhere in the UK or abroad.

Figure 11.3 shows that the largest of the high value business service employment sectors in London is IT with around 105,000 employee jobs. Legal services and business/management consultancy both have around 84,000 employee jobs. Other significant employment sectors are the accountancy sector with around 61,000 employee jobs and the architectural and engineering consultancy sector which has around 56,000 employee jobs. Slightly smaller is the advertising sector.

**Figure 11.3: Employee jobs in 'high value business services', 1995 – 2005**



Source: ABI

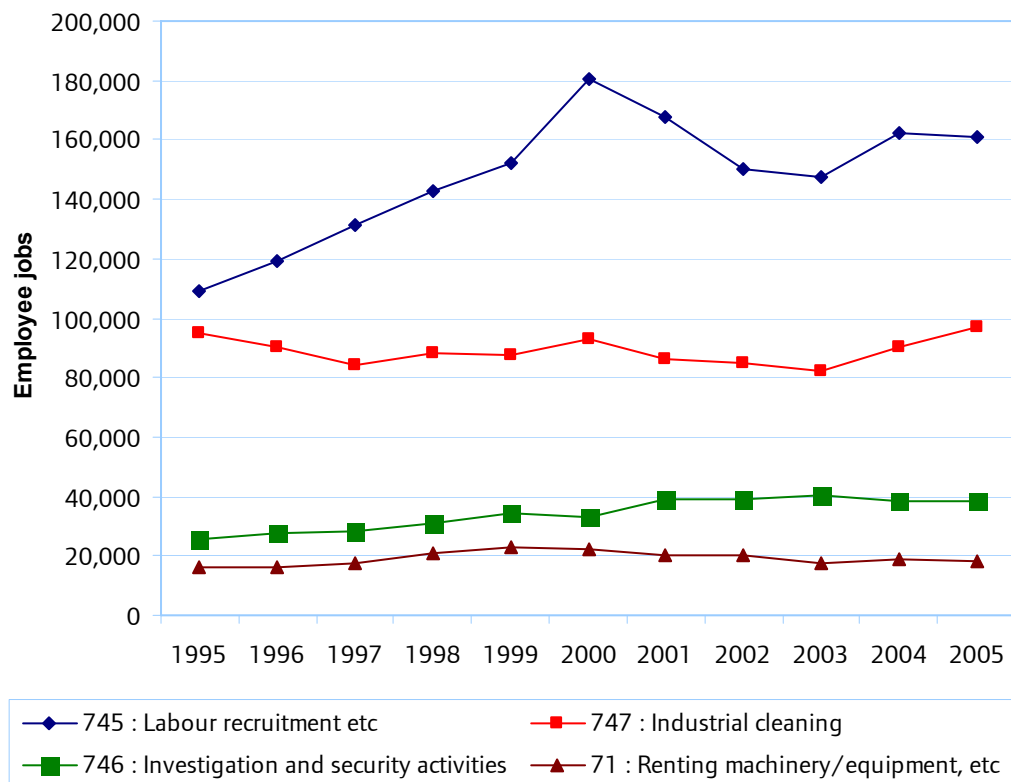
### Support business services

Whilst people employed in London in high-value business services may well work for clients elsewhere in the UK or abroad, jobs in support business services are mostly carried out in a local context.

The largest employment category in support business services is the labour recruitment category. This includes most of the workers across London who work on a temporary or contract basis through employment agencies. The existence of these workers is vital to the flexibility of the labour market in London and can include workers involved in many different sectors of the economy.

Cleaning and security are two key employment sectors that are good examples of support business services that operate in a local context. Furthermore, they are large employers with over 96,000 industrial cleaning employee jobs and 38,000 security employee jobs in 2005.

**Figure 11.4: Employee jobs in 'support business services', 1995 – 2005**



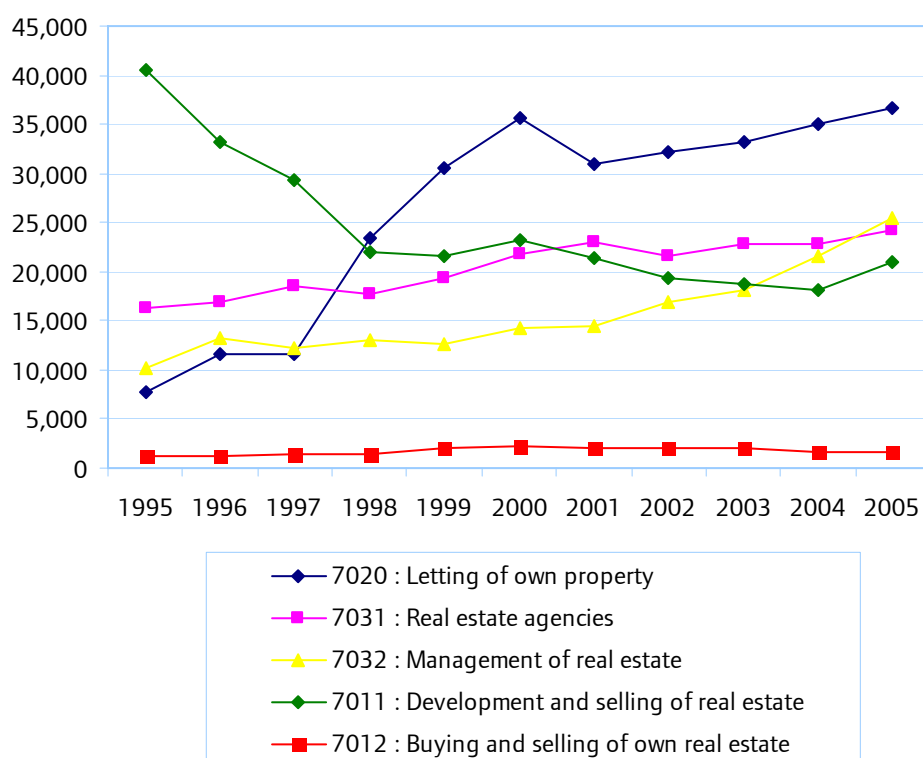
Source: ABI

### **Real estate activities**

There are around 50,000 employee jobs in London that involve real estate activities on a fee or contract basis; in other words, jobs that involve providing a service to others in relation to the buying (estate agents – SIC 7031) or management (rent collectors, facilities managers – SIC 7032) of real estate.



**Figure 11.5: Employee jobs in real estate activities, 1995 – 2005**



Source: ABI

The 'business services' sector also includes 59,000 people who are included in the Annual Business Inquiry survey as being involved in activities related to their own property. This includes 36,000 people who let their own property with the remainder involved in property development.

### **Other business services not elsewhere classified.**

Finally, within the 'business services' sector, there are 104,000 employee jobs that are coded as being business services but not falling into the above categories.

### **Employment specialisations**

As Table 11.1 shows, London has a strong specialisation in business services with 23 per cent of total GB employee jobs in the sector to be found in London.

For high-value business services, the share of GB jobs in London is even higher at 25 per cent. Legal services, management consultancy, accounting, advertising and market research are all particularly strong London specialities within a UK context.

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**Table 11.1: Business services – London share of GB employee jobs, 2005**

|  | <b>London<br/>employee<br/>jobs</b> | <b>London<br/>share of GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|--|-------------------------------------|---|------------------------------------|
| Business services  | 1,016,000                           | 23%   | 1.64                               |
|  |                                     |   |                                    |
| High Value business services   | 488,900                             | 25%   | 1.83                               |
| 72 : Computer and related activities   | 105,100                             | 21%   | 1.49                               |
| 7411 : Legal activities  | 83,500                              | 31%   | 2.48                               |
| 7414 : Business and management consultancy activities  | 83,900                              | 30%   | 2.34                               |
| 7412 : Accounting, book-keeping and auditing activities; tax consultancy                     | 61,300                              | 29%   | 2.22                               |
| 742 : Architectural and engineering activities and related technical consultancy             | 55,600                              | 18%   | 1.19                               |
| 744 : Advertising  | 30,300                              | 38%   | 3.42                               |
| 7415 : Management activities of holding companies  | 27,500                              | 25%   | 1.83                               |
| 7413 : Market research and public opinion polling  | 23,800                              | 40%   | 3.68                               |
| 73 : Research and development  | 13,400                              | 13%   | 0.82                               |
| 743 : Technical testing and analysis   | 4,600                               | 12%   | 0.74                               |
|  |                                     |   |                                    |
| Local business services  | 314,400                             | 21%   | 1.44                               |
| 745 : Labour recruitment and provision of personnel  | 161,000                             | 21%   | 1.50                               |
| 747 : Industrial cleaning  | 96,900                              | 22%   | 1.56                               |
| 746 : Investigation and security activities  | 38,600                              | 23%   | 1.68                               |
| 71 : Renting of machinery and equipment without operator and of personal and household goods | 17,900                              | 12%   | 0.72                               |
|  |                                     |   |                                    |
| 70 : Real estate activities  | 109,100                             | 23%   | 1.68                               |
| 7011 : Development and selling of real estate  | 21,000                              | 24%   | 1.71                               |
| 7020 : Letting of own property   | 36,600                              | 21%   | 1.49                               |
| 7031 : Real estate agencies  | 24,300                              | 23%   | 1.61                               |
| 7032 : Management of real estate on a fee or contract basis                                  | 25,400                              | 27%   | 2.02                               |
| 7012 : Buying and selling of own real estate   | 1,700                               | 37%   | 3.26                               |
|  |                                     |   |                                    |
| 748 : Miscellaneous business activities not elsewhere classified                             | 103,700                             | 21%   | 1.49                               |

Source: ABI

For support business services, 21 per cent of GB employment is to be found in London. This will be representative of the fact that London's strong finance, media and high-value business services sectors means that London has a greater amount of office space in need of cleaning, security etc than do other areas of the country.

London also has a large share of the nation's estate agents, with 23 per cent of employment in real estate agencies in GB to be found within London.

## 12. Public administration

'Public Administration' corresponds to Section L of the SIC 'Public Administration and Defence; Compulsory Social Security'.

This sector is defined as activities involved in 'administration of the State and the economic and social policy of the community' together with 'Provision of services to the community as a whole' which includes foreign affairs, defence, public order, judicial activities and fire service activities. Activities related to social security are also included.

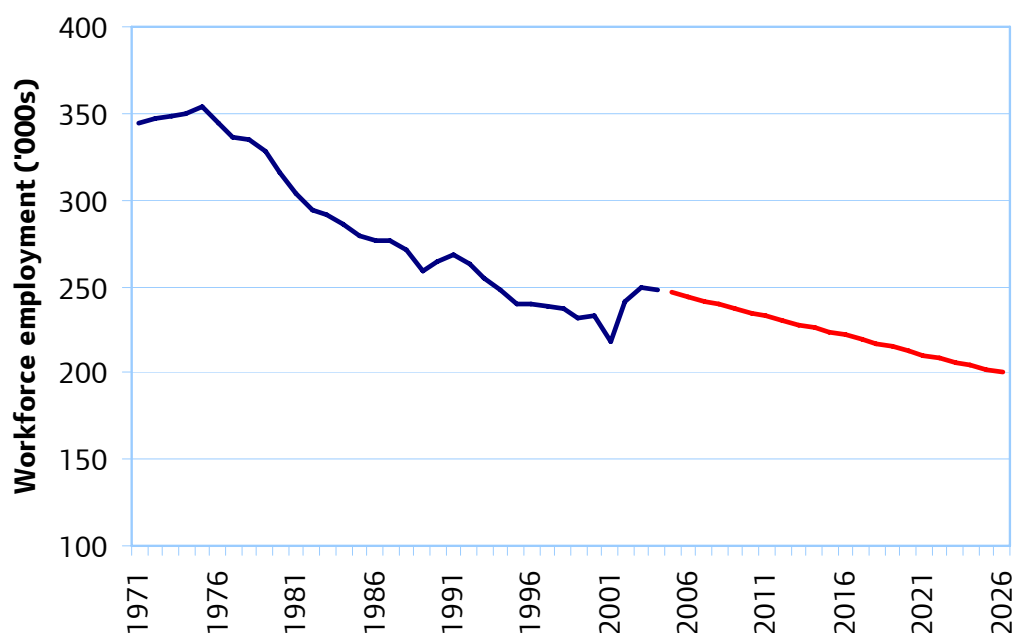
In effect this sector includes the majority of central government and local government employment together with that of the other public sector bodies such as the police force and the fire service. It does not include health or education which are considered separately in a different sector.

### Employment trends

In general, public administration employment in London goes through brief periods where it increases (such as the past couple of years) but in general is on a long-term downward trend with 100,000 workforce jobs lost in the sector over the past three decades.

The forecast is for a decline in workforce employment from current levels (2004) of 248,000 down to 200,000 by 2026.

**Figure 12.1: Public administration workforce employment, 1971 – 2026**



Source: EBS and Volterra

### Employment specialisations

Given that London is the base for the government of the United Kingdom it is unsurprising to find that the index of specialisation for public administration is above 1.00. However, the index of 1.13 suggests that the London bias of public administration jobs within GB is not particularly large. The areas in which London has the largest share of employment is in foreign affairs and in security and judicial related activities. London's share of employment is low in defence activities.

**Table 12.1: Public administration – London share of GB employee jobs, 2005**

|  | <b>London<br/>employee<br/>jobs</b> | <b>London<br/>share of GB<br/>employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|--|-------------------------------------|---|------------------------------------|
| 75 : Public administration and defence; compulsory social security   | 243,200                             | 17%   | 1.13                               |
|  |                                     |   |                                    |
| 751 : Administration of the State and the economic and social policy of the community  | 146,100                             | 16%   | 1.09                               |
| 7511 : General (overall) public service activities   | 93,600                              | 17%   | 1.17                               |
| 7512 : Regulation of the activities of agencies that provide health care, education, cultural services and other social services excluding social security | 35,200                              | 16%   | 1.06                               |
| 7513 : Regulation of and contribution to more efficient operation of business  | 16,300                              | 13%   | 0.83                               |
| 7514 : Supporting service activities for the government as a whole   | 1,100                               | 10%   | 0.59                               |
|  |                                     |   |                                    |
| 752 : Provision of services to the community as a whole  | 94,100                              | 18%   | 1.23                               |
| 7524 : Public security, law and order activities   | 54,300                              | 20%   | 1.40                               |
| 7523 : Justice and judicial activities   | 22,700                              | 23%   | 1.61                               |
| 7522 : Defence activities  | 9,000                               | 11%   | 0.69                               |
| 7525 : Fire service activities   | 6,900                               | 11%   | 0.69                               |
| 7521 : Foreign affairs   | 1,100                               | 57%   | 7.48                               |
|  |                                     |   |                                    |
| 753 : Compulsory social security activities  | 3,000                               | 10%   | 0.60                               |

Source: ABI

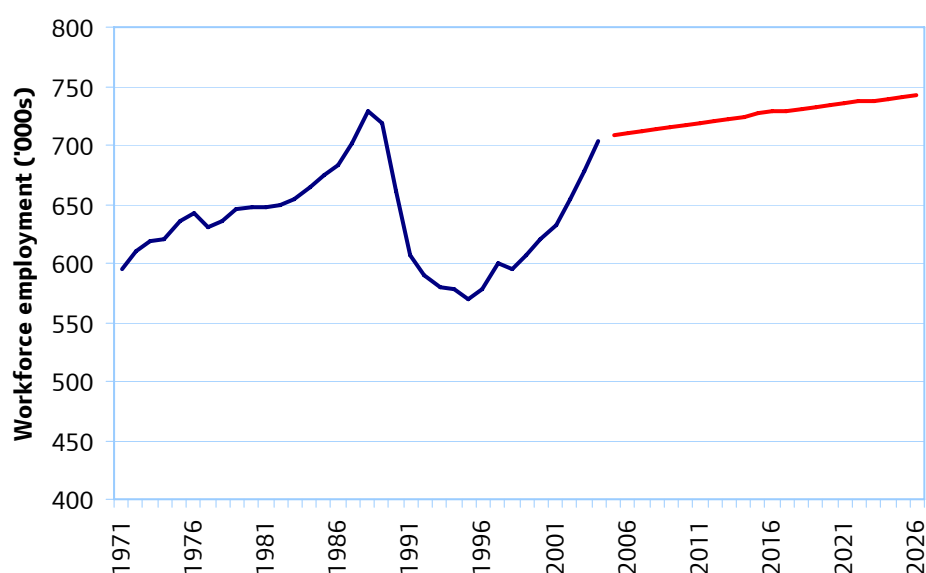
### 13. Health and education

'Health and Education' includes section M of the SIC 'Education' and section N of the SIC 'Health and Social Work'.

#### Employment trends

Figure 13.1 shows that there has been an unusual trend to employment within the health and education sector with an upward trend through the 1970s and 1980s punctuated by a very significant and sharp decline in employment in the early 1990s. Since the mid-1990s, employment in health and education has once again been rising within London.

**Figure 13.1: Health and education workforce employment, 1971 – 2026**

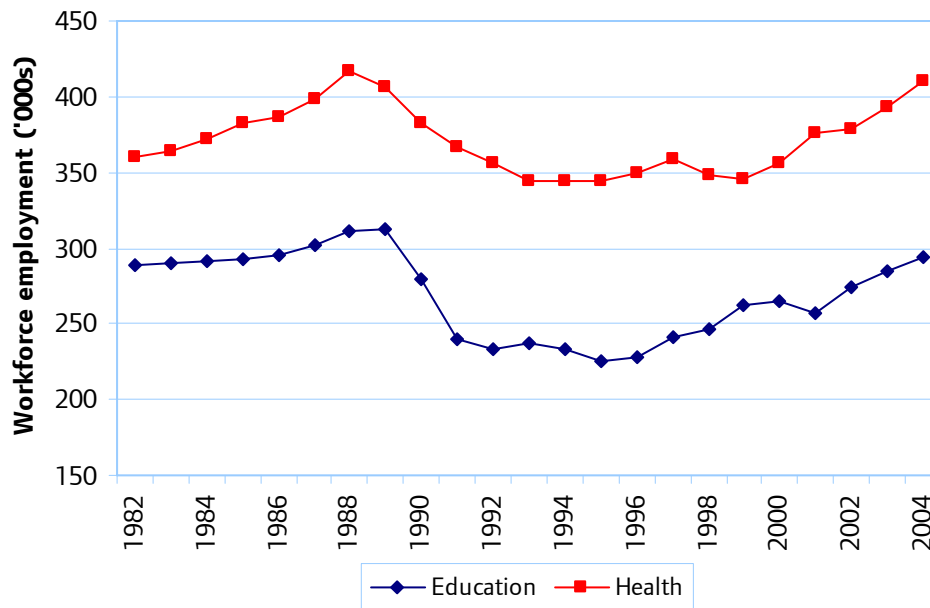


Source: EBS and Volterra

The forecast is for a gradual increase in employment in the health and education sector to 2026 taking employment up to 742,000. The fact that population is expected to rise in London through the forecast period gives support to the prediction of rising employment in these people-related employment sectors.

Figure 13.2 shows that the decline in employment seen in the early 1990s occurred in both the health and education sectors, and that both sectors have seen increased employment over the past four or five years.

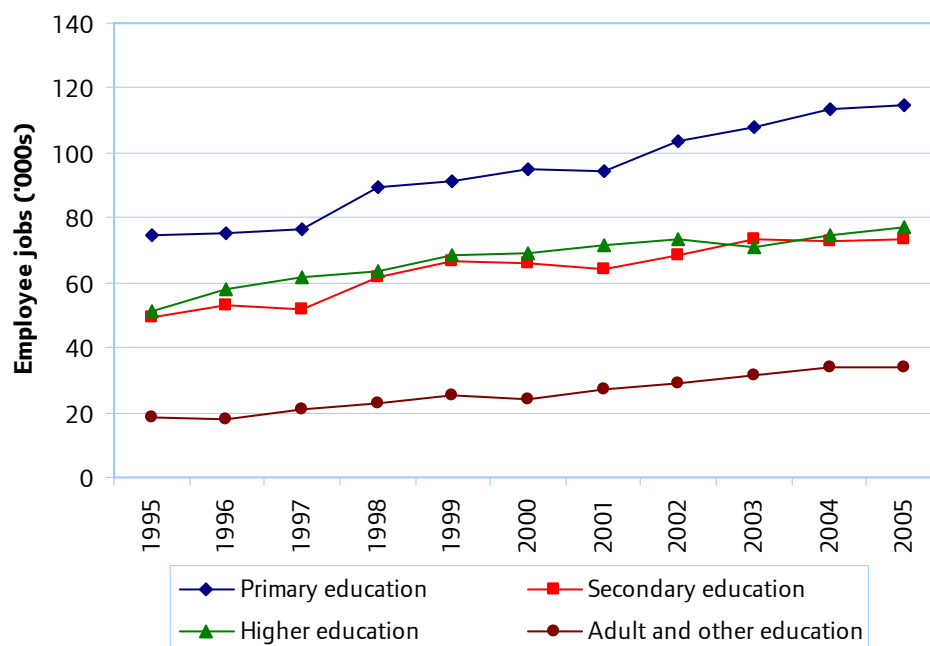
**Figure 13.2: Health and education workforce employment, 1982 – 2004**



Source: EBS

Figure 13.3 shows employee jobs within the education sector over the past decade. It shows employment has been rising in all education age groups: primary, secondary, higher and adult.

**Figure 13.3: Employee jobs in education, 1995 – 2005**



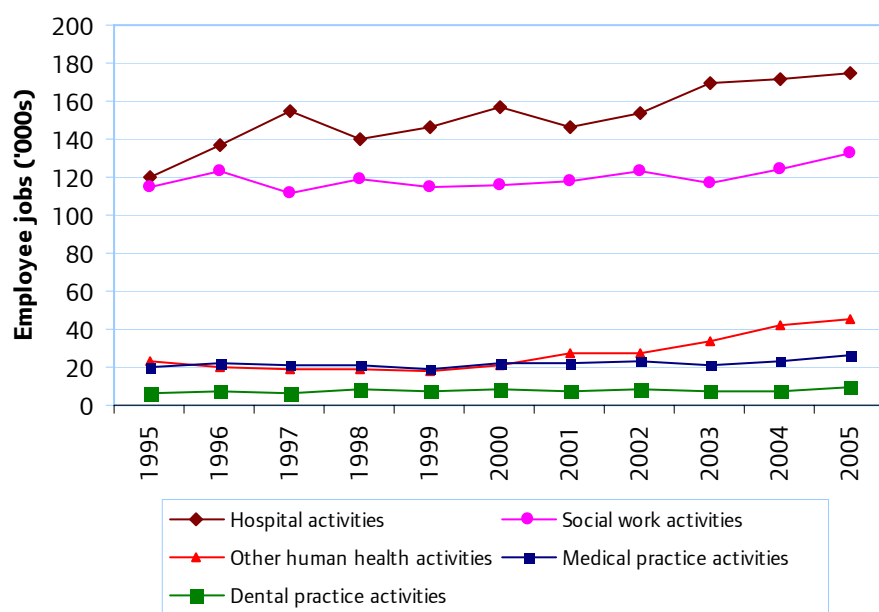
Source: ABI

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Figure 13.4 shows employee jobs within the health sector. It shows an increase in employment over the past decade in hospital activities and also in the 'other human health activities' sector, which includes activities for human health not taken in hospitals or by doctors, but by others such as nurses, midwives, physiotherapists, speech therapists etc.

**Figure 13.4: Employee jobs in health, 1995 – 2005**



Source: ABI

## Employment specialisations

The index of specialisation for health and education employment is 0.78. The fact this is less than 1.00 shows that as a proportion of total employment, the number of people employed in these sectors in London is lower than that across the rest of GB. Whilst this is partly representative of the higher employment in London in other sectors such as business services, the low index of specialisation is also representative of the fact that London has fewer people employed in health and education relative to population than the rest of the UK.



**Table 13.1: Health and education – London share of GB employee jobs, 2005**

|                                      | <b>London<br/>employee<br/>jobs</b> | <b>London share of<br/>GB employee<br/>jobs</b> | <b>Index of<br/>specialisation</b> |
|--------------------------------------|-------------------------------------|---|------------------------------------|
| Health and education                 | 689,700                             | 12%   | 0.76                               |
| 80 : Education                       | 299,000                             | 12%   | 0.76                               |
| 801 : Primary education              | 114,700                             | 12%   | 0.72                               |
| 802 : Secondary education            | 73,200                              | 11%   | 0.65                               |
| 803 : Higher education               | 77,200                              | 14%   | 0.91                               |
| 804 : Adult and other education      | 33,900                              | 14%   | 0.88                               |
| 85 : Health and social work          | 390,700                             | 12%   | 0.77                               |
| 8511 : Hospital activities           | 175,100                             | 12%   | 0.76                               |
| 8512 : Medical practice activities   | 26,700                              | 13%   | 0.81                               |
| 8513 : Dental practice activities    | 9,200                               | 13%   | 0.85                               |
| 8514 : Other human health activities | 44,900                              | 14%   | 0.87                               |
| 8520 : Veterinary activities         | 2,600                               | 7%  | 0.44                               |
| 853 : Social work activities         | 132,200                             | 12%   | 0.74                               |

Source: ABI

It is noticeable that within the health and education sector, London has a higher index of specialisation for higher and adult education than it does for primary and secondary education. This reflects the size of the University of London and other higher education facilities.

## 14. Other services

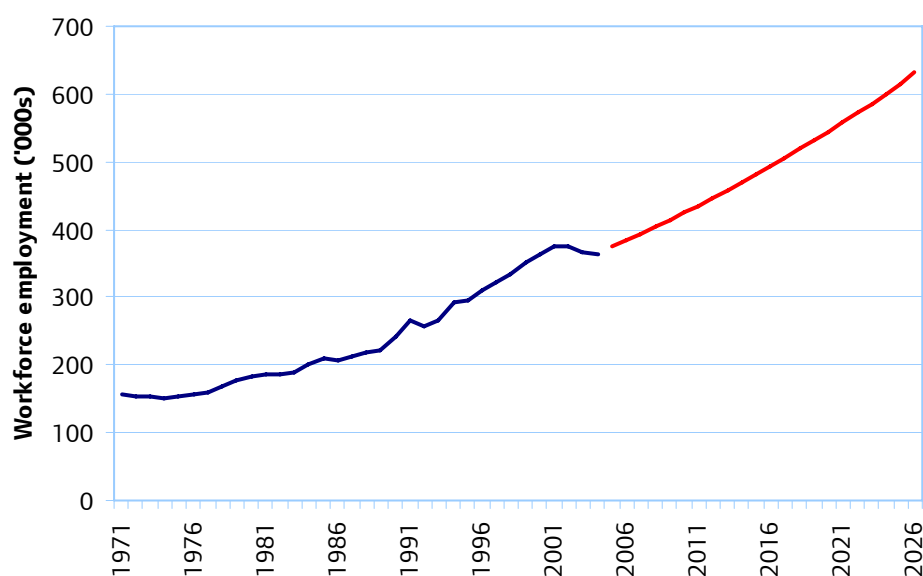
'Other Services' corresponds to Section O of the SIC 'Other Community, Social and Personal Service Activities'.

Overall, 'Other Services' includes a rather diverse set of employment jobs. However, the key sectors that it includes for London are the media sector, in which London specialises, and the recreation and leisure sector which provides a large number of jobs providing local leisure services for London's consumers.

### Employment trends

Workforce employment in 'Other Services' has risen from 156,000 in 1971 up to 364,000 in 2004 and as such is one of the fastest growing sectors of the London economy. This can be seen in the strong growth forecast to 2026, at which time workforce employment in London is expected to have risen to 631,000.

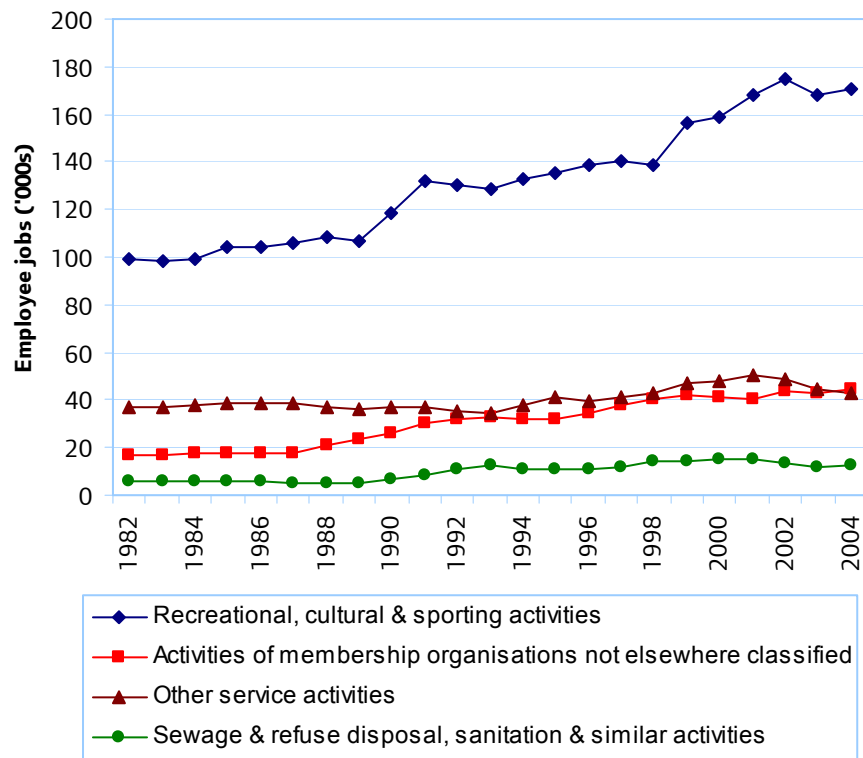
**Figure 14.1: Other services workforce employment, 1971 – 2026**



Source: EBS and Volterra

The SIC splits 'Other Services' into four two-digit sections. As shown in Figure 14.2 the largest section is 'Recreational, Cultural and Sporting Activities'. In 2004, this was responsible for 63 per cent of all employee jobs in 'Other Services'.

**Figure 14.2: Other services employee jobs, 1982 – 2004**



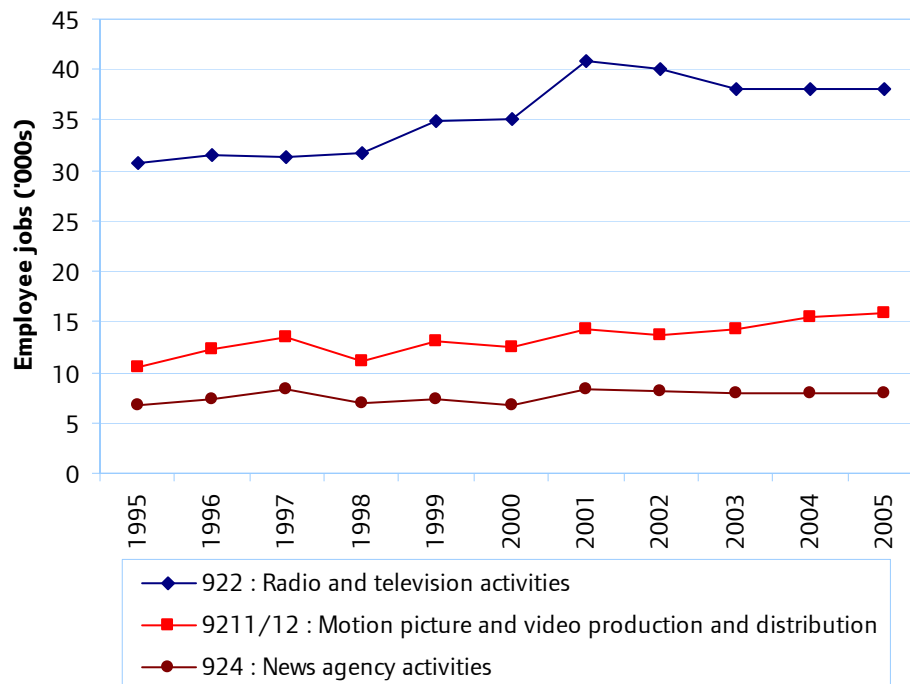
Source: EBS

### Recreational, cultural and sporting activities (SIC 92)

Employment in recreational, cultural and sporting activities can be disaggregated further. One means of doing so is to split the employment into that related to the media and that related to recreation and leisure.

Figure 14.3 shows the media related employee jobs in the 'Other Services' sector. There were approximately 62,000 employee jobs across radio, television, motion picture production and news agencies in 2005. These media related jobs are important for London as they are an area in which London specialises (see also publishing in the manufacturing sector to which they are related), producing goods and services consumed throughout the UK as well as exported abroad.

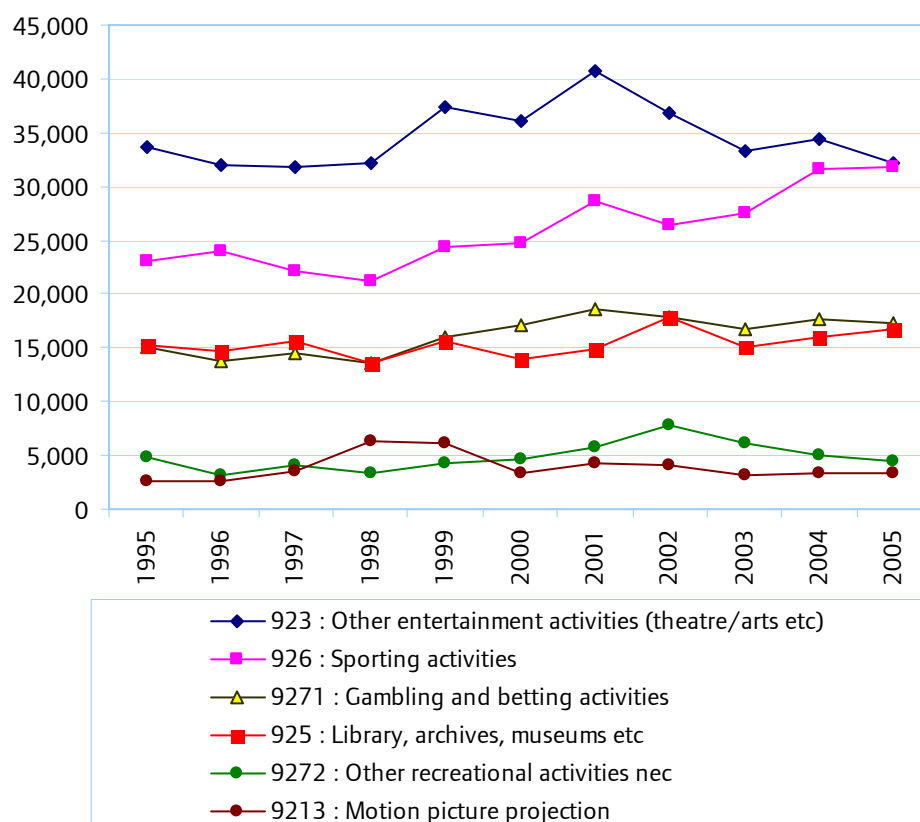
**Figure 14.3: Employee jobs in media, 1995 – 2005**



Source: ABI

Figure 14.4 shows leisure and recreation jobs within the 'Other Services' section. In contrast to the media jobs, these leisure and recreation jobs exist to provide services that are in general consumed locally and not exported to other regions. There were 106,000 employee jobs within these leisure and recreation related employment sectors in 2005. In general these are growing employment sectors as they are mostly financed through consumer expenditure, which continues to rise in London. The employment in leisure and recreation includes jobs in arts, theatre, sports and gambling.

**Figure 14.4: Employee jobs in recreational activities, 1995 – 2005**



Source: ABI

### Other service activities (SIC 93)

In 2004, there were 41,000 employee jobs in this sector. However, this includes 17,000 jobs which are not categorised. Of the remainder, hairdressing and beauty treatment are responsible for around 14,000 London employee jobs; dry cleaning for 7,500 employee jobs; and the remainder is in the contrasting sectors of funerals and physical well being activities.

### Activities of membership organisation not elsewhere classified (SIC 91)

This sector has actually seen employment more than double from less than 20,000 workforce jobs in the early 1970s to over 43,000 at the present time. It includes activities of religious organisations (11,000 employees in 2004), business and employer organisations (5,000 employees), professional organisations (9,000 employees) and trade unions and political organisations (4,000 employees).

### Sewage and refuse disposal, sanitation and similar activities (SIC 90)

There are approximately 13,000 employee jobs in London section dealing with sewage, refuse disposal and similar waste-related activities.

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**Employment specialisations**

Table 14.1 shows that London's main area of specialisation within the 'other services' sector is in media activities with 60 per cent of GB jobs located in London – highlighting just how much London dominates this sector.

**Table 14.1: Other services – London share of GB employee jobs, 2005**

|  | London employment | London share of GB employment | Index of specialisation |
|--|-------------------|-------------------------------|-------------------------|
| 'Other Services'   | 266,700           | 20%                           | 1.34                    |
|  |                   |                               |                         |
| 92 : Recreational, cultural and sporting activities                  | 168,500           | 23%                           | 1.64                    |
|  |                   |                               |                         |
| Media activities   | 62,600            | 60%                           | 8.14                    |
| 922 : Radio and television activities                                | 38,700            | 56%                           | 7.18                    |
| 9211/12 : Motion picture and video production and distribution       | 15,800            | 64%                           | 9.65                    |
| 924 : News agency activities   | 8,000             | 69%                           | 12.30                   |
|  |                   |                               |                         |
| Leisure and recreation   | 105,900           | 17%                           | 1.12                    |
| 923 : Other entertainment activities                                 | 32,200            | 33%                           | 2.77                    |
| 926 : Sporting activities  | 31,900            | 11%                           | 0.69                    |
| 9271 : Gambling and betting activities                               | 17,300            | 19%                           | 1.27                    |
| 925 : Library, archives, museums and other cultural activities       | 16,700            | 18%                           | 1.23                    |
| 9272 : Other recreational activities not elsewhere classified        | 4,400             | 10%                           | 0.62                    |
| 9213 : Motion picture projection                                     | 3,400             | 19%                           | 1.30                    |
|  |                   |                               |                         |
| 93 : Other service activities  | 41,400            | 13%                           | 0.85                    |
|  |                   |                               |                         |
| 91 : Activities of membership organisations not elsewhere classified | 43,600            | 20%                           | 1.38                    |
|  |                   |                               |                         |
| 90 : Sewage and refuse disposal, sanitation and similar activities   | 13,200            | 13%                           | 0.83                    |

*Source: ABI*

Amongst leisure and recreation jobs, 'other entertainment activities', which is focused largely on theatre and the arts, is the area in which London specialises most relative to the rest of the UK. However, in general there is little difference between London and UK employment levels in the other leisure and recreation job sectors.

## **Appendix A: Data sources and definitions**

### **The Standard Industrial Classification (SIC)**

The SIC is used for classifying business establishments and other statistical units by the type of economic activity in which they are engaged. It provides a framework for the collection, tabulation, presentation and analysis of data and its use promotes uniformity.<sup>7</sup>

The SIC is divided into 17 sections. Each of these are then broken down into sections denoted by a two-digit code. In turn, these sections may be broken down again into three-digit groups and then into classes (four-digit). Finally, there may be a further breakdown into sub-classes (five-digit). An example is as follows:

Section I : Transport, Storage and Communication

60 : Land Transport; Transport via pipelines

60.2 : Other Land Transport

60.24: Freight Transport by Road

60.24/1 : Furniture Removal Activities.

In this report, data is examined on a section-by-section basis, with data examined at the two, three and four digit levels. Data disaggregated at the five-digit level is not as widely available and has not been used in this report.

Key to the use of the SIC is the list of 17 sections. Employment and employment forecasts are usually provided by statistical and economic bodies according to the definitions of these sections. This is true of the GLA Group for whom employment analysis and projections are provided by GLA Economics according to these definitions.

The aim of this report, therefore, is to provide readers with a clearer understanding of the definitions of each of these employment sections and of the types of jobs that exist within them. To do this, the report analyses employment trends within London under each section, disaggregating the data to show the different types of employment that make up each employment section.

The 17 employment sections in the SIC are as follows:

A: Agriculture, hunting and forestry

B: Fishing

C: Mining and quarrying

D: Manufacturing

E: Electricity, gas and water supply

F: Construction

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<sup>7</sup> National Statistics, 2003, UK Standard Industrial Classification of Economic Activities 2003. View: [http://www.statistics.gov.uk/methods\\_quality/sic/downloads/UK\\_SIC\\_Vol1\(2003\).pdf](http://www.statistics.gov.uk/methods_quality/sic/downloads/UK_SIC_Vol1(2003).pdf)

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G: Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods

H: Hotels and restaurants

I: Transport, storage and communications

J: Financial intermediation

K: Real estate, renting and business activities

L: Public administration and defence; compulsory social security

M: Education

N: Health and social work

O: Other community, social and personal service activities

P: Private households employing domestic staff and undifferentiated production activities of households for own use

Q: Extra – Territorial organisations and bodies.

The final two sections have zero employment and are usually excluded from any analysis. Furthermore, in the case of London there are a number of other sections which only have very low levels of employment and are therefore often combined in employment analysis and forecasting. Additionally, because some of the names of the sections above are a little long and unwieldy, they are often shortened.

The analysis in this report therefore aims to be consistent with the section names and combinations usually used by GLA Economics. These are shown in Table A:

**Table A: London's employment categories**

| <b>Employment category</b>   | <b>SIC sections</b> |
|------------------------------|---------------------|
| Primary and utilities        | A,B,C,E             |
| Manufacturing                | D                   |
| Construction                 | F                   |
| Wholesale                    | part of G           |
| Retail                       | part of G           |
| Hotels and restaurants       | H                   |
| Transport and communications | I                   |
| Financial services           | J                   |
| Business services            | K                   |
| Public administration        | L                   |
| Health and education         | M,N                 |
| Other services               | O                   |

## Data sources

### *Time series employment data*

Each of these twelve employment categories is discussed in turn in this report. In each case employment data is presented from a number of sources. Firstly, historical data back to either 1971 or 1982 is presented. This data is produced by Experian Business



Strategies (EBS) for the GLA,<sup>8</sup> but is generally only available at an aggregated level and is available up to 2004. More disaggregated data is available and presented from 1995 to 2005 from the Annual Business Inquiry (ABI). It should be noted that when ABI data has been quoted in the tables in this report, employment totals have been rounded to the nearest 100, in accordance with the guidelines for using this data.

When viewing this data it is important to be aware that two different definitions of employment are presented. Workforce jobs constitute an estimate of all jobs including those of employees and the self employed. In general, most of the EBS data presented in this paper (including all the 1971 – 2026 time series) is in the form of workforce jobs this giving a picture of total employment in London.

By contrast, data on employee jobs excludes the self-employed. The ABI data and some of the more disaggregated EBS data is only available for employee jobs. Therefore, when this data is presented it should be borne in mind that the self employed are excluded from these figures and would need to be added to gain a true picture of full employment<sup>9</sup>. The reason that employee jobs data is shown in this report is that without it, it would not be possible to provide highly disaggregated data. So the fact that it excludes the self-employed is balanced by the fact that this is the only way in which disaggregated data can be shown – data that is key in gaining an understanding of London's overall employment trends.

Finally, in addition to historical data, this report includes the latest GLA employment forecasts as produced in February 2007<sup>10</sup>. These employment forecasts are provided to the GLA by Volterra Consulting and are provided for each of the 12 employment categories for London listed in Table 2.1. These forecasts are updated annually, are calculated based on the EBS historical time series data, and the units used are Workforce Employment.

### **Employment specialisations**

To gain an understanding of which areas of economic activity a region specialises in, it is possible to examine the relative shares of employment between different regions. In this report the comparison made is between employment in London and employment in the rest of GB.

Two related statistics are shown. Firstly, for each employment sector, London's share of total employee jobs in GB is shown. The higher the share of GB jobs located within London, the more London can be considered to specialise in the area. When examining this data it is useful to be aware that overall London is the location for 15 per cent of total GB jobs across all sectors.

The second statistic shown is the index of specialisation. This is calculated as:

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<sup>8</sup> for more details, see GLA Economics, 2003, The GLA's London Workforce Employment Series

<sup>9</sup> The self employed constituted 12 per cent of London's total employment in 2004.

<sup>10</sup> GLA Economics, 2007, Working Paper 20: Employment Projections for London By Sector and Borough

**Working Paper 24:**

An analysis of London's employment by sector

$$\frac{(\text{London employment in sector} / \text{London total employment})}{(\text{Rest of GB employment in sector} / \text{Rest of GB total employment})}$$

Therefore if the index of specialisation is greater than 1.00, then this shows that London has a greater share of its total jobs in the sector being examined than does the rest of GB. As such it can be regarded as an area in which London has some specialisation. The higher the index of specialisation above 1.00, the greater the degree of specialisation.

By contrast if the index of specialisation is less than 1.00, then this shows that the rest of GB has a greater share of its total jobs in the sector being examined than does London. The closer the index of specialisation gets to zero, the smaller London's role in the sector being considered is compared to the rest of the UK.

## Acronyms

|       |   |
|-------|---|
| ABI   | Annual Business Inquiry                               |
| EBS   | Experian Business Strategies                          |
| GB    | Great Britain   |
| GLA   | Greater London Authority                              |
| Manuf | Manufacturing   |
| OECD  | Organisation of Economic Co-operation and Development |
| SIC   | Standard Industrial Classification                    |
| UK    | United Kingdom  |

# Other formats and languages

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## Chinese

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## Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

## Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

## Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

## Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

## Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

## Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

## Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

## Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

## Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.