Coast to Capital LEP Skills Advisory Panel

Skills and Labour Market Research: Baseline Appendix – Final Report

September 2019

Introduction

Purpose of Document

The baseline appendix provides a snapshot of all the data required by the SAP analytical toolkit and groups them under the relevant questions asked. This should be used as an evidence base and in conjunction with the baseline report, which provides explanation and analysis of the key datasets.

It's important to note that data sets have been used where possible. Some datasets do not provide data at the the LEP area level. In these instances regional or national data has been presented to show high level trends which could be applicable to the LEP.

This report sets out data as per the following chapters:

Stage 1: Analysis and Definition of Local Landscape

Coast to Capital

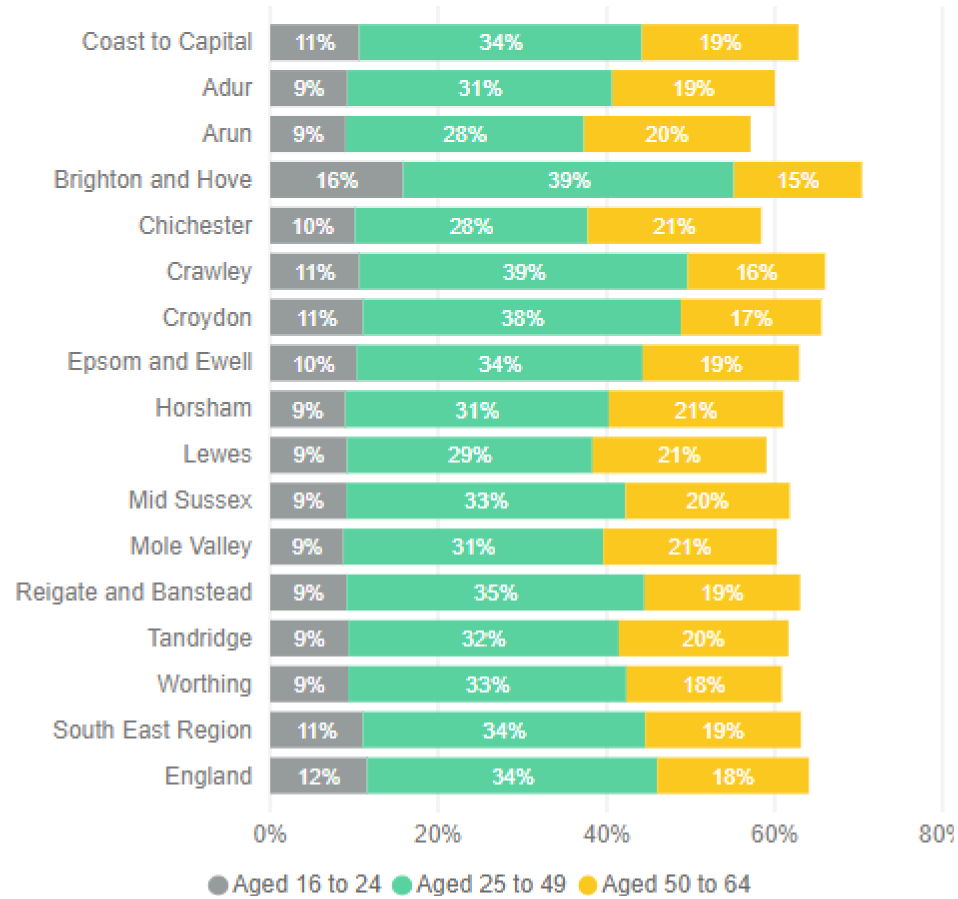
HATCH REGENERIS

Skills and Labour Supply

Demographic Profile – What is the demographic structure (by size and age) of the overall and working populations?

1.1 Age Profile of the LEP area, 2017

1.2 Age Distribution of Working Age Population Breakdown of Coast to Capital Local Authorities vs South East Region and England, 2017



Sources: Mid-Year Population Estimates, ONS, 2007-17

Skills and Labour Supply

Education Providers - Who are the key education providers in the local area and where are they situated?

1.3 External and local providers of learning, 2019

Type	Name	Local Authority
Further Education (FE) Providers	Brighton Hove and Sussex Sixth Form College	Brighton and Hove
	Chichester College Group	Chichester
	East Surrey College	Reigate and Banstead
	Greater Brighton Metropolitan College	Brighton and Hove
	North East Surrey College of Technology (NESCOT)	Epsom and Ewell
	Reigate College	Reigate and Banstead
	The College of Richard Collyer in Horsham	Horsham
	Varndean College	Brighton and Hove
	Worthing College	Worthing
Higher Education (HE) Providers	University of Brighton	Brighton and Hove
	University of Chichester	Chichester
	University of Creative Arts Epsom	Epsom and Ewell
	University of Sussex	Brighton and Hove

Sources: Hatch Regeneris, 2019

Skills and Labour Supply

NEETs - What is the proportion of individuals who are Not in Education, Employment or Training (NEETs)?

1.4 Proportion of 16-17 year olds recorded as not in education, employment or training or whose activity is not known, 2018

Name	Number of 16/17 year olds known to LA	Total NEET (including not known)	Proportion of NEET (including not known)	NEET change in year in percentage points (%)
Brighton and Hove	4,910	220	4.6%	+0.1%
Croydon	8,780	540	6.2%	-1.7%
South East Region	177,690	9,830	5.5%	-1.2%
England	1,119,100	61,830	5.5%	-0.5%

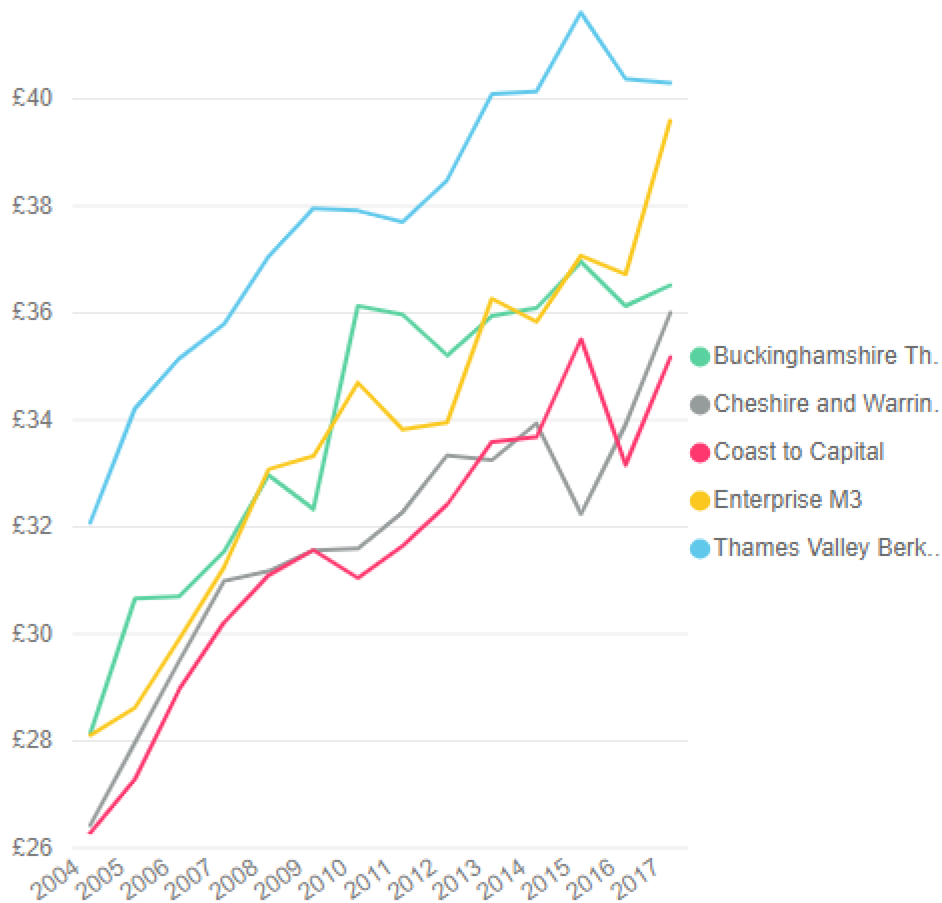
Note: NEET data is only available by Unitary Authority at the lowest level geography. All unitary authorities in the LEP area have been listed, including a comparison to the South East Region and England.

Source: Young people not in education, employment or training (NEET), Labour Market data, ONS (2019)

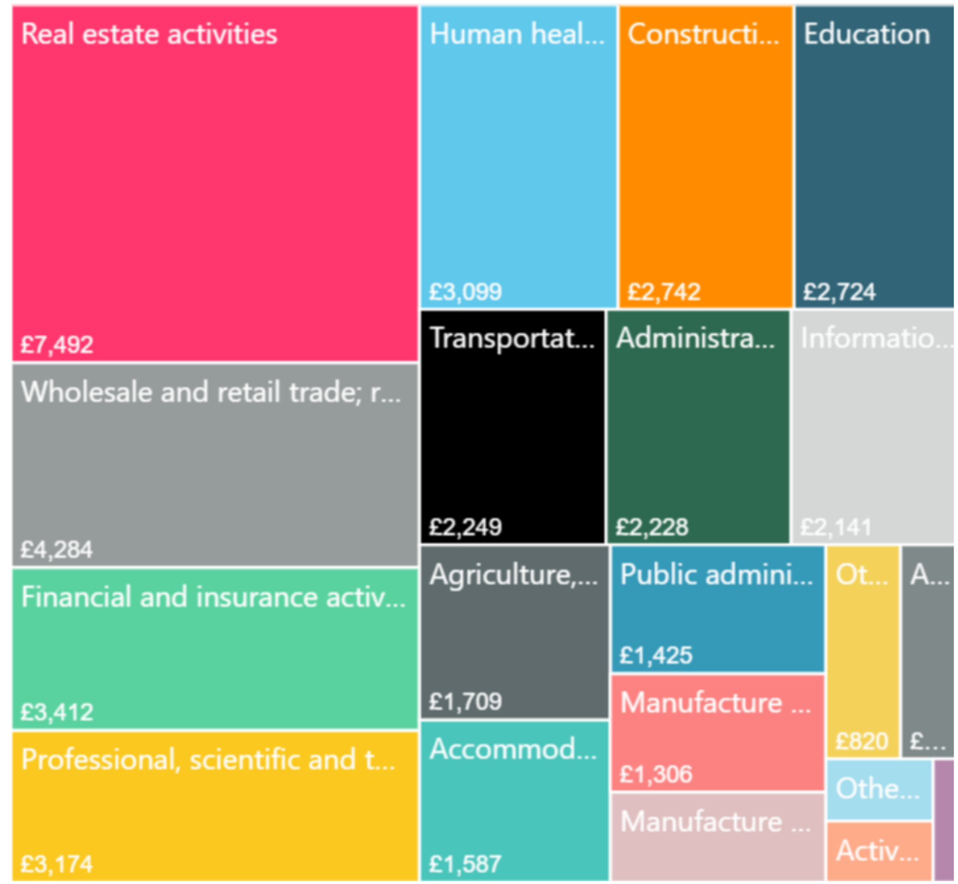
Economy and Labour Demand

Productivity - What is the level of productivity and economic activity (overall and by sector / occupation)?

1.5 Sub regional productivity: Nominal gross value added (GVA) per Hour worked, 2019



1.6 Nominal Gross value Added (GVA) by broad industry group (£ million)



Source: Labour Productivity Statistics, ONS (2018)

Economy and Labour Demand

Economic Activity - What are the levels of employment, unemployment and inactivity?

1.7 Economic Activity of Working Age Population

	Name	All working age population	Economically Active	Economically Active (%)	In Employment	Employment Rate (%)	Economically inactive	Economically Inactive (%)
Coast to Capital Local Authorities	Adur	37,500	30,600	82%	30,000	80%	6,900	18%
	Arun	86,000	66,100	77%	64,900	75%	19,900	23%
	Brighton and Hove	205,500	159,200	77%	146,800	71%	46,200	22%
	Chichester	66,200	56,500	85%	54,400	82%	9,700	15%
	Crawley	72,700	58,400	80%	52,900	73%	14,300	20%
	Croydon	251,100	198,800	79%	191,700	76%	52,400	21%
	Epsom and Ewell	48,600	41,600	86%	39,300	81%	7,100	15%
	Horsham	80,600	63,500	79%	61,200	76%	17,100	21%
	Lewes	59,500	46,900	79%	45,000	76%	12,600	21%
	Mid Sussex	91,500	78,200	85%	77,500	85%	13,300	15%
	Mole Valley	49,700	39,200	79%	38,800	78%	10,500	21%
	Reigate and Banstead	89,600	69,500	78%	66,300	74%	20,100	22%
	Tandridge	50,300	39,700	79%	39,700	79%	10,600	21%
	Worthing	66,900	57,600	86%	57,600	86%	9,200	14%
Coast to Capital LEP vs Comparators	Enterprise M3	1,027,000	858,100	84%	837,900	82%	168,900	16%
	Buckinghamshire Thames Valley	322,100	265,500	82%	259,300	81%	56,600	18%
	Thames Valley Berkshire	569,700	469,200	82%	454,900	80%	100,600	18%
	South East (Essex Only)	891,700	720,300	81%	696,500	78%	171,400	19%
	South East Region	5,559,000	4,493,200	81%	4,335,900	78%	1,065,500	19%
	Coast to Capital	945,100	760,100	80%	729,400	77%	184,900	20%
	Cheshire and Warrington	559,200	444,400	79%	429,300	77%	114,800	21%
	England	34,404,000	27,064,200	79%	25,915,300	75%	7,337,500	21%

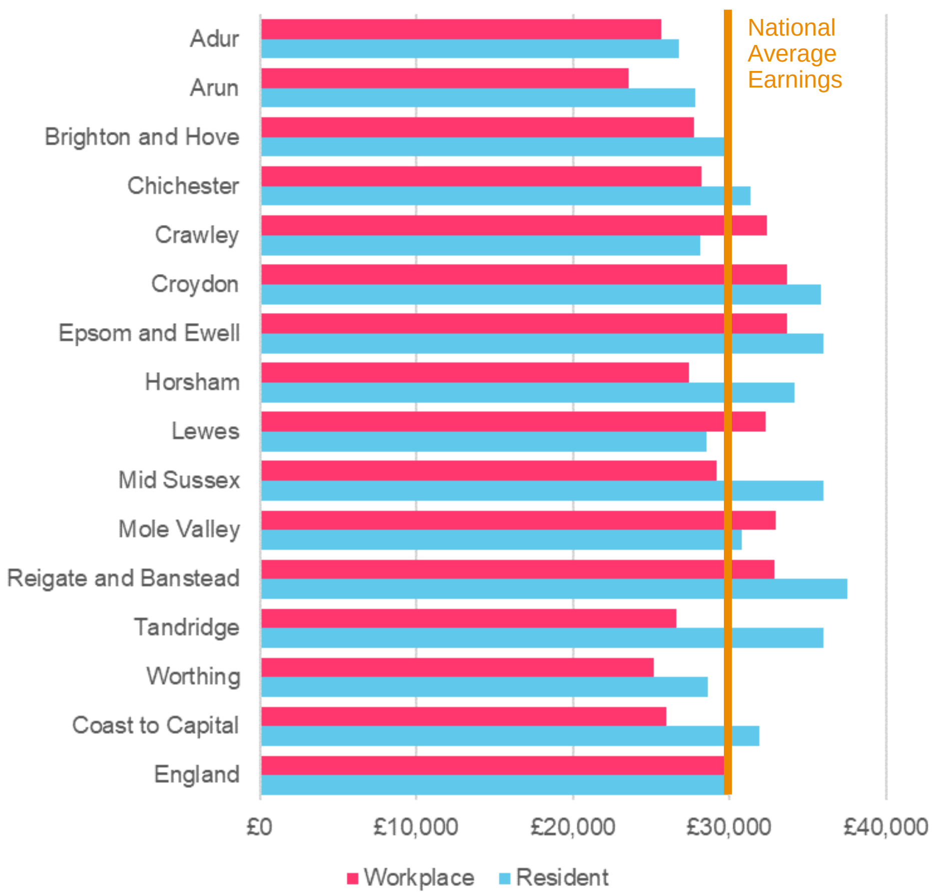
Note: Coast to Capital LEP vs Comparators are ranked by employment rate (%).

Source: Annual Population Survey, ONS (2018)

Economy and Labour Demand

Incomes - What proportion of jobs are low paid? Which occupations / sectors are these in (e.g. public sector)? What proportion of low paid employees move to higher paid work over time?

1.8 Gross Annual Pay of Coast to Capital Local Authorities, 2018



1.9 Gross Median Annual Pay by Sector Nationally, 2018

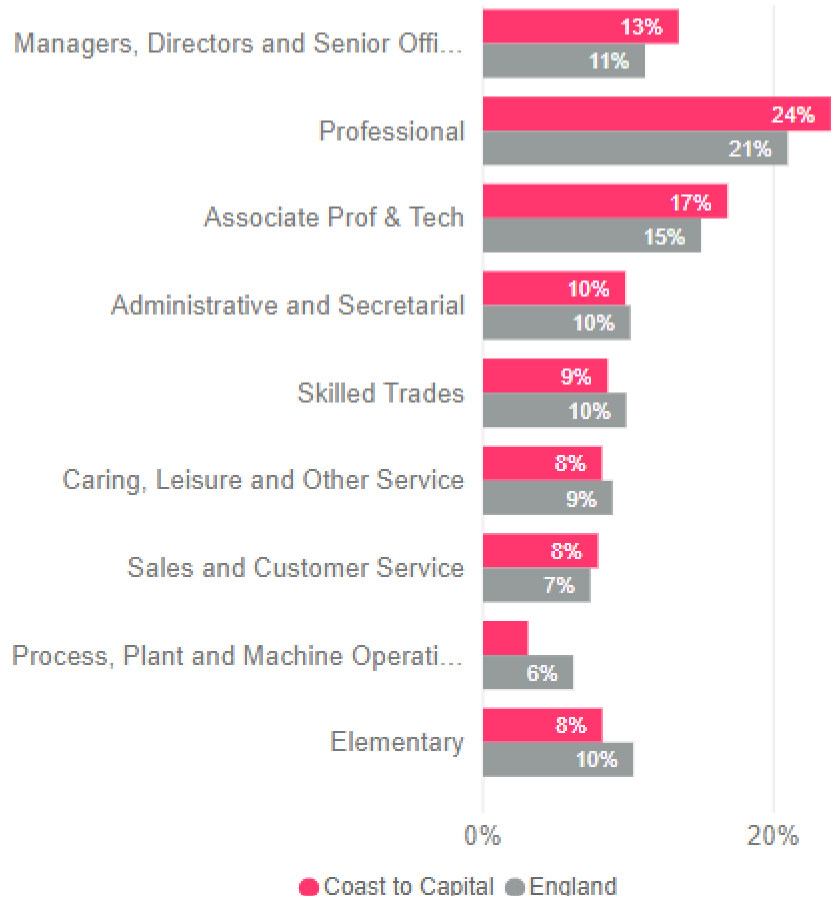
Name	Median Wage
Information & Communication	£33,450
Construction	£30,990
Financial & Insurance	£30,810
Public Admin & Defense	£30,340
Professional Services	£28,970
Education	£28,750
Manufacturing	£27,690
Transport & Storage	£26,160
Health & Social Work	£23,740
Wholesale & Retail	£23,140

Source: Annual Survey of Hours and Earnings, ONS (2018)

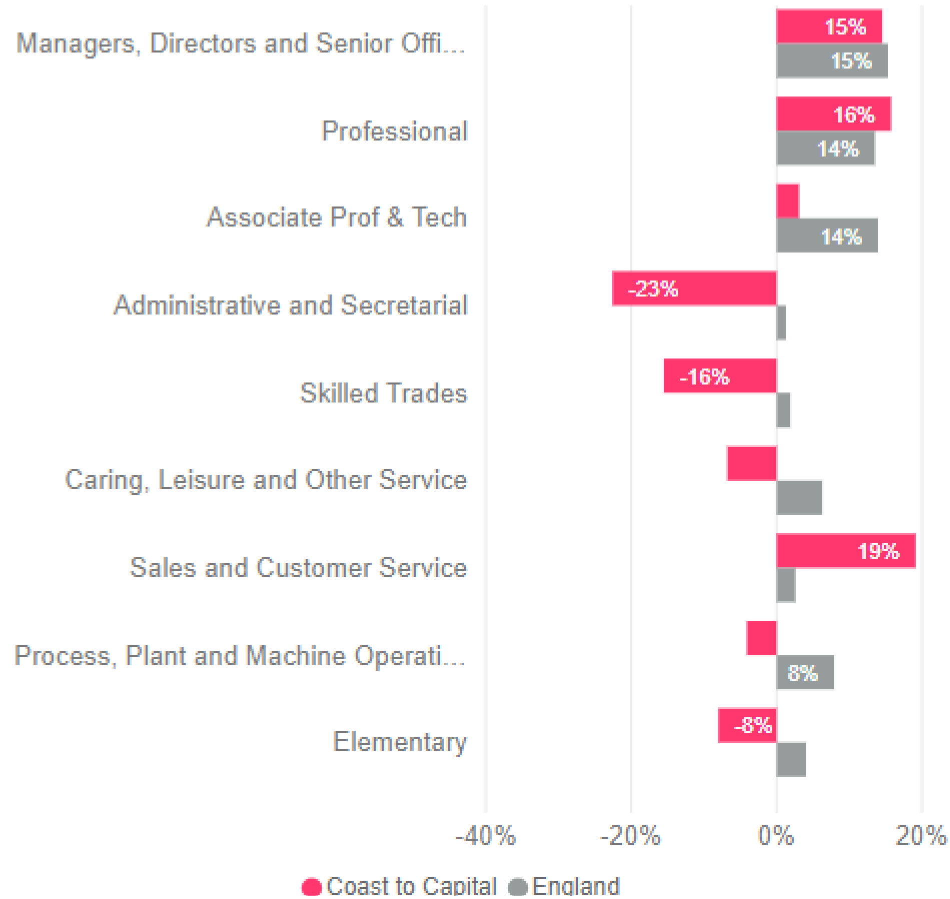
Economy and Labour Demand

Key Sectors – What are the key sectors / occupations of employment?

1.10 Share of Occupations for Coast to Capital Residents, 2018



1.11 Growth in Occupations for Coast to Capital Residents, 2012 – 2017



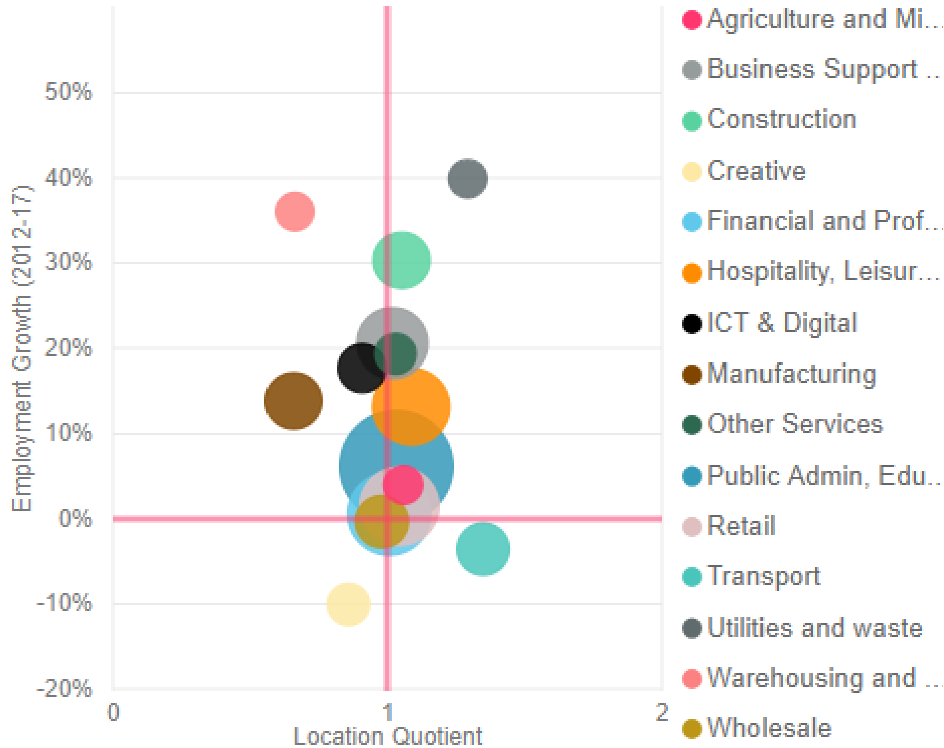
Source: Annual Population Survey, ONS (2019); Business Register and Employment Survey, ONS (2017)

Stage 1: Analysis and Definition of Local Landscape

Economy and Labour Demand

Key Sectors – What are the key sectors / occupations of employment?

1.12 Employment Sector Trends: Size, Growth and Specialisation, 2017



Employment Size: Total jobs in the sector in 2017, denoted by size of bubble.
Employment Growth: % growth in employment between 2012 - 2017 by sector
Location Quotient: Specialisation of sector (proportion of employment for total econom
compared to England average (i.e. LQ of 2 = 2 times more specialised).

1.13 Total Employment and Growth in Coast to Capital vs Comparators, 2012 - 2017

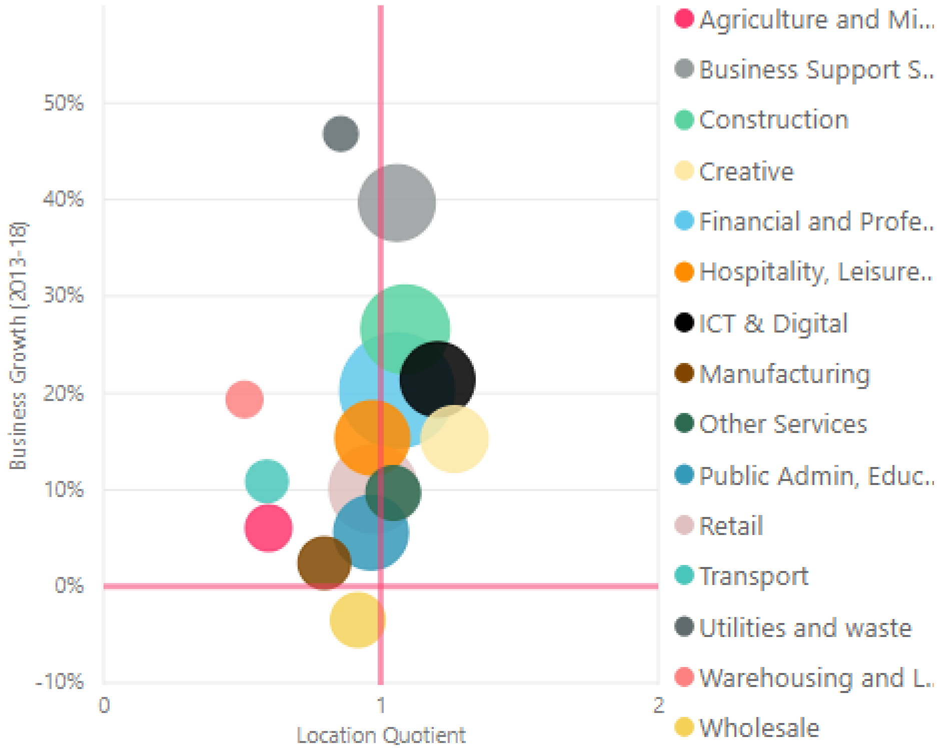
Name	Total Jobs (2017)	Absolute Employment Growth (12-17)	% Employment Growth (12 – 17)
Cheshire and Warrington	500,000	+66,000	+15%
England	25,574,250	+2,550,000	+11%
South East (Essex Only)	586,000	+52,000	+10%
Buckinghamshire Thames Valley	231,000	+20,000	+9%
Thames Valley Berkshire	504,000	+42,000	+9%
South East Region	4,106,000	+325,000	+9%
Coast to Capital	694,000	+54,000	+8%
Enterprise M3	807,000	+47,000	+6%

Source: Annual Population Survey, ONS (2019); Business Register and Employment Survey, ONS (2017)

Economy and Labour Demand

Economic Growth - What is the rate of job and business creation (overall and by sector / occupation)?

1.14 Business Sector Trends: Size, Growth and Specialisation, 2018

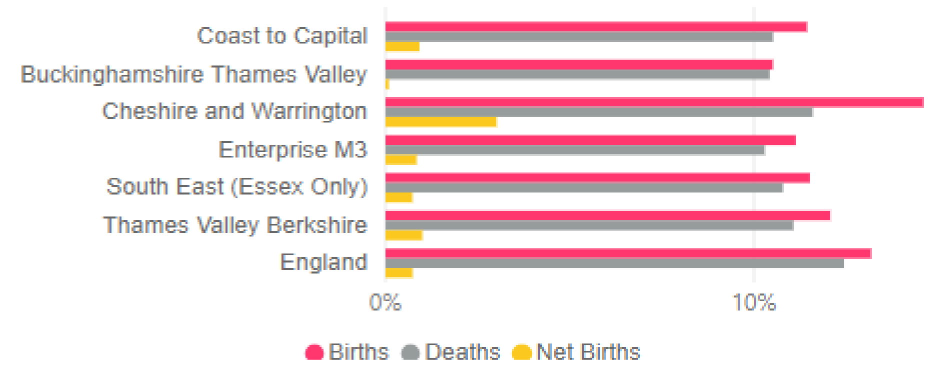


Business Size: Total businesses in the sector in 2018, denoted by size of bubble.
Business Growth: % growth in business between 2013 - 2018 by sector
Location Quotient: Specialisation of sector (proportion of businesses for total economy compared to England average (i.e. LQ of 2 = 2 times more specialised).

1.15 Business Total and Growth in Coast to Capital vs Comparators, 2018

Name	Total Jobs (2017)	Absolute Employment Growth (12-17)	% Employment Growth (12 – 17)
Cheshire and Warrington	51,480	+9,790	+23%
England	2,669,675	+459,930	+21%
Thames Valley Berkshire	51,320	+8,050	+19%
South East (Essex Only)	72,410	+10,645	+17%
South East Region	467,155	+66,485	+17%
Coast to Capital	82,180	+11,575	+16%
Buckinghamshire Thames Valley	33,900	+4,395	+15%
Enterprise M3	99,135	+12,180	+14%

1.1 Business Births and Deaths as a Proportion of Active Businesses, 2018



Source: UK Business Counts and UK Business Demography, ONS (2018)

Economy and Labour Demand

Key Sectors – What are the key sectors / occupations of employment?

1.16 Detailed Employment and Business Sector Breakdown for Coast to Capital

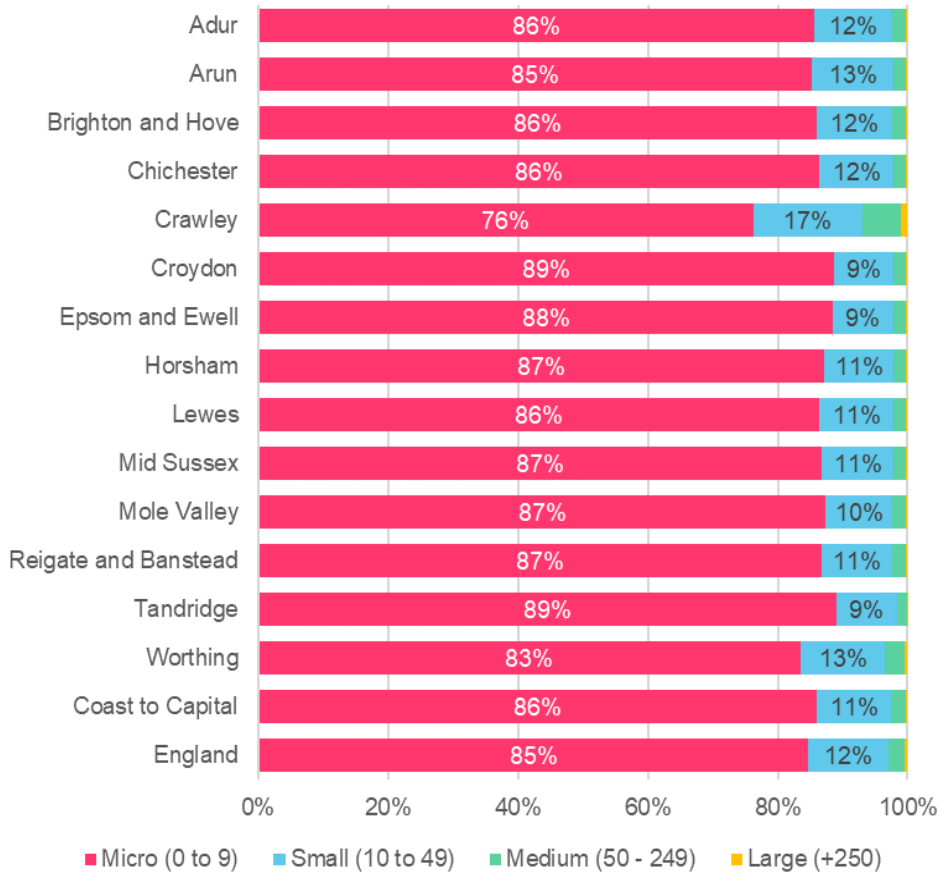
		Employment in Coast to Capital				Businesses in Coast to Capital			
Name	**Total Jobs (2017)**	**Total Employment (2017)**	**% total employment**	**LQ vs England**	**% Employment Growth (12 – 17)**	**Total Businesses**	**% total business**	**LQ vs England**	**% Business Growth (13 – 18)**
Creative & Professional	Business Support Services	62,805	9%	1.0	21%	6,920	9%	1.1	40%
	Creative	13,880	2%	0.9	-10%	4,910	6%	1.3	15%
	Financial and Professional Services	95,685	13%	1.0	1%	17,205	21%	1.1	20%
	ICT & Digital	23,910	3%	0.9	18%	6,580	8%	1.2	21%
	Other Services	12,330	2%	1.0	19%	2,835	4%	1.0	10%
Support Industries	Construction	36,450	5%	1.1	30%	9,785	12%	1.1	27%
	Transport	28,180	4%	1.3	-4%	1,325	2%	0.6	11%
	Warehousing and Logistics	8,720	1%	0.7	36%	555	1%	0.5	19%
	Wholesale	29,120	4%	1.0	0%	3,045	4%	0.9	-3%
Local Services	Hospitality, Leisure and Rec	77,845	11%	1.1	13%	6,715	8%	1.0	15%
	Retail	82,290	12%	1.0	1%	9,490	12%	1.0	10%
Industrial	Agriculture and Mining	10,350	1%	1.1	4%	1,845	2%	0.6	6%
	Manufacturing	36,405	5%	0.7	14%	2,545	3%	0.8	2%
	Utilities and waste	9,820	1%	1.3	40%	345	0%	0.9	47%
Public Services	Public Admin, Education, Health	185,930	26%	1.0	6%	6,550	8%	1.0	6%
	Total	713,720	100%	-	-	80,650	100%	-	-

Source: Annual Population Survey, ONS (2019); Business Register and Employment Survey, ONS (2017)

Economy and Labour Demand

Business & Wage Distribution - What does the dispersion / distribution in employment (e.g. business type and size) and wages look like?

1.17 Business Size by Coast to Capital Local Authority, 2018

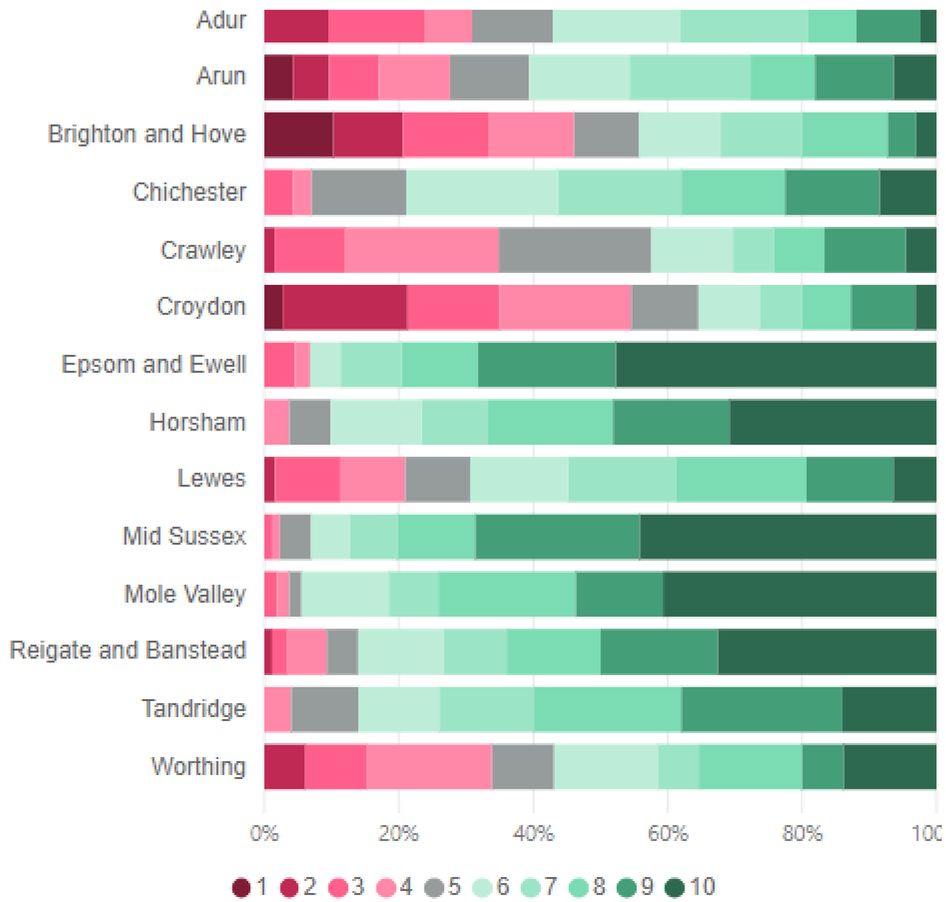


Source: UK Business Count, ONS (2018); Annual Survey of Hours and Earnings, ONS (2018)

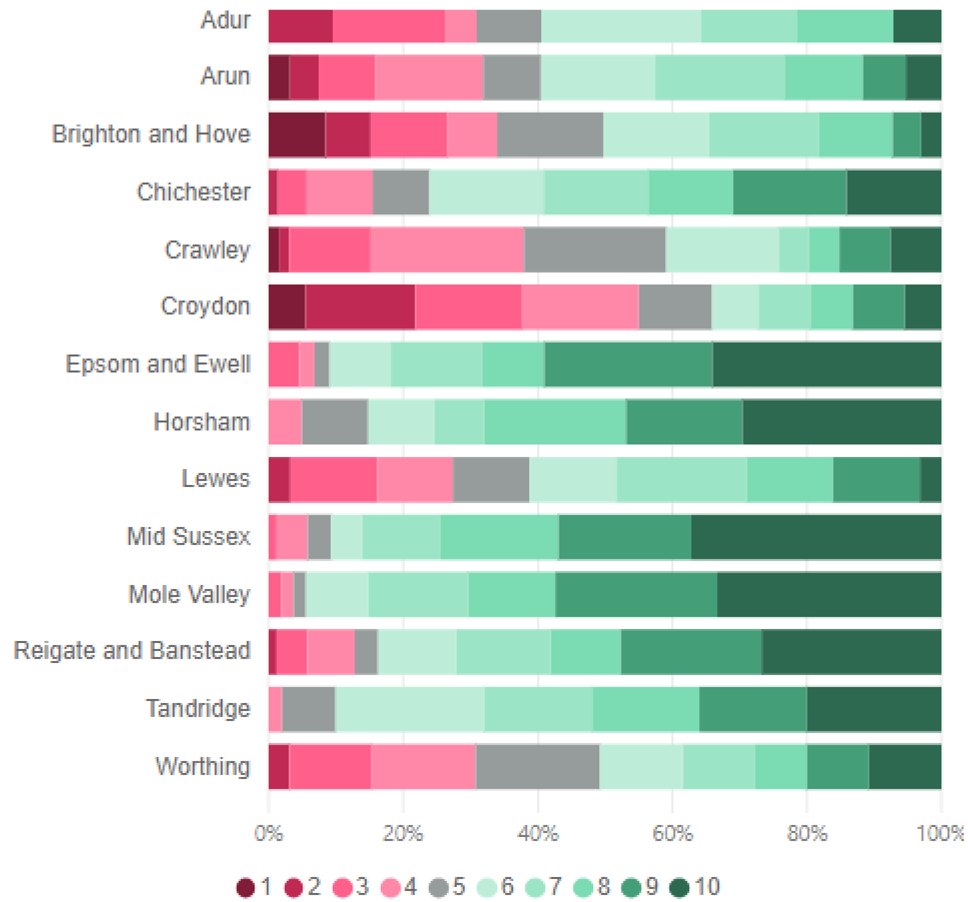
Cross cutting

Inequality - What are the levels of inequality in your area? What proportion of individuals are in receipt of government payments?

1.18 Index of Multiple Deprivation: Overall Deprivation, 2015



1.19 Index of Multiple Deprivation: Income Deprivation, 2015

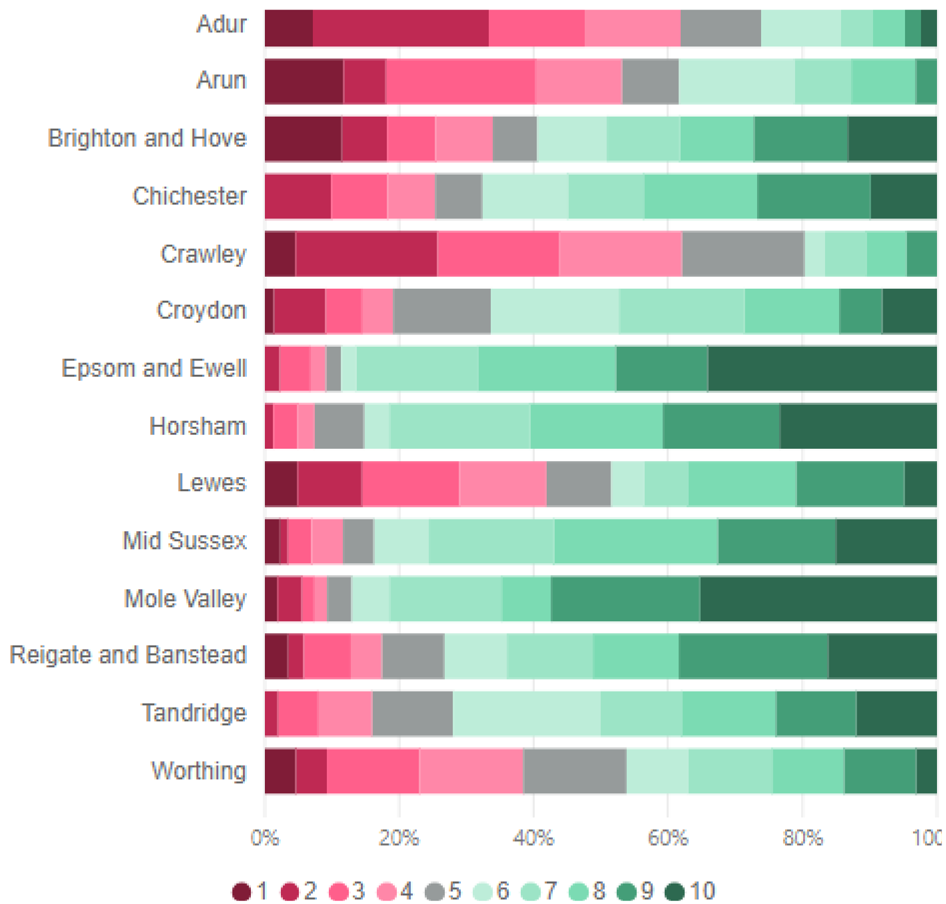


Source: Index of Multiple Deprivation, MHCLG (2015)

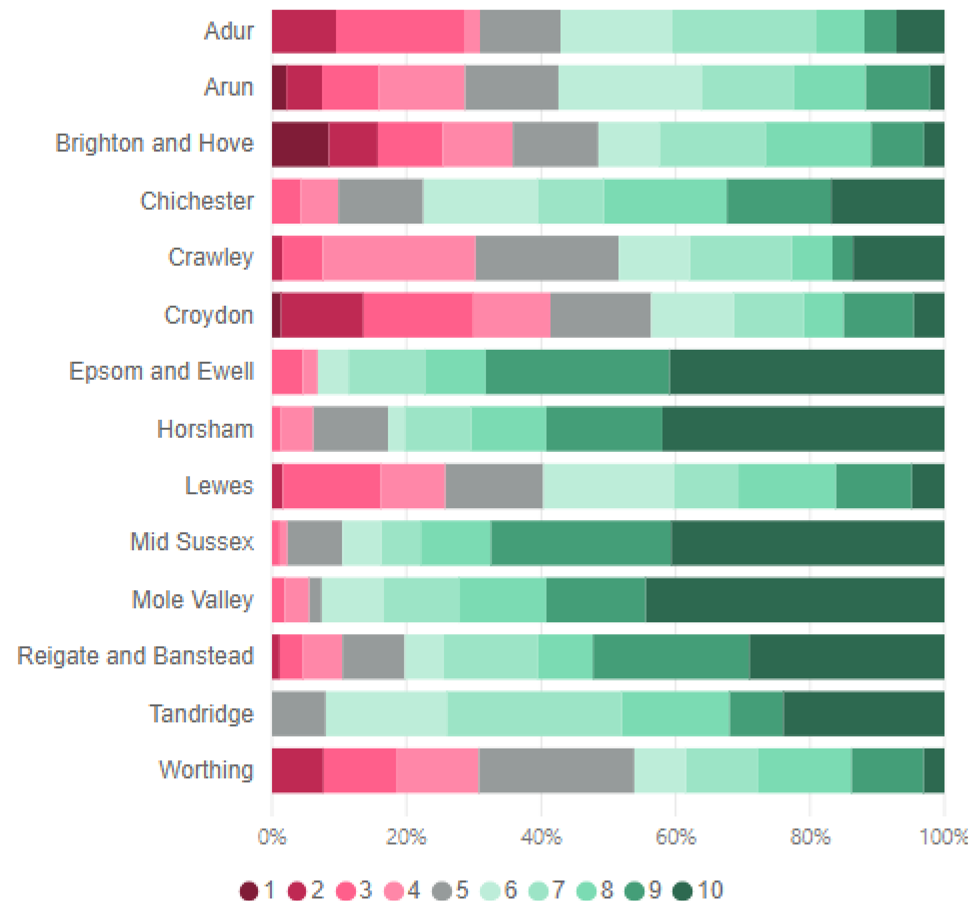
Cross cutting

Inequality - What are the levels of inequality in your area? What proportion of individuals are in receipt of government payments?

1.20 Index of Multiple Deprivation: Education Deprivation, 2015



1.21 Index of Multiple Deprivation: Employment Deprivation, 2015

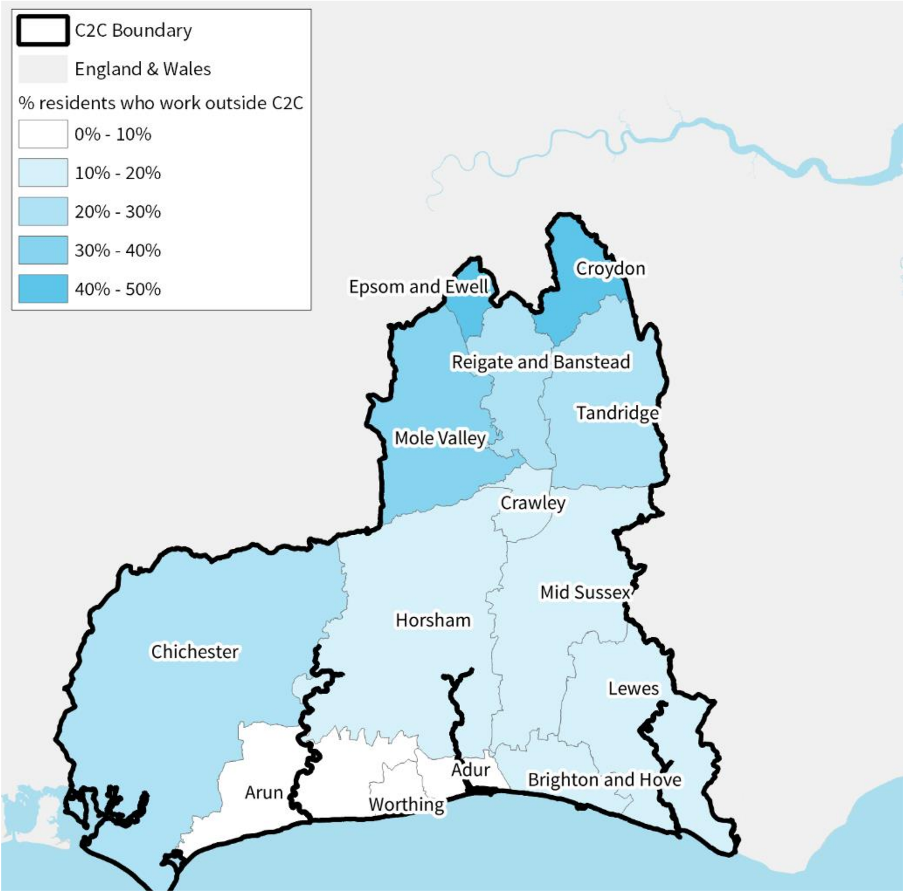


Source: Index of Multiple Deprivation, MHCLG (2015)

Skills and Labour Supply

Local Migration - What proportion of people move employment within the local area? What are the reasons for employee movement (e.g. wages, progression opportunities)?

1.22 % of residents by local authority who work outside Coast to Capital (inc. Croydon and Lewes), 2011



1.23 Breakdown of Residents by Local Authority who work inside and Outside Coast to Capital (inc. Croydon and Lewes), 2011

		Place of work			
		Work Outside Coast to Capital (No.)	Work Outside Coast to Capital (%)	Work Within Coast to Capital (No.)	Work Within Coast to Capital (%)
Place of Residence	Adur	1,578	5%	21,859	74%
	Arun	5,238	8%	47,440	70%
	Brighton & Hove	14,625	10%	95,016	68%
	Chichester	11,178	21%	28,457	53%
	Crawley	6,603	12%	41,254	74%
	Croydon	81,544	47%	59,065	34%
	Epsom & Ewell	18,673	49%	11,791	31%
	Horsham	8,801	13%	42,300	63%
	Lewes	6,768	15%	28,205	61%
	Mid Sussex	11,830	16%	45,315	62%
	Mole Valley	13,420	31%	18,396	43%
	Reigate & Bans'	19,571	27%	37,214	52%
	Tandridge	12,187	29%	19,342	46%
	Worthing	2,859	6%	38,159	75%
	Coast to Capital	**214,875**	**23%**	**533,813**	**56%**
	London	3,085,589	77%	114,236	3%

Note: Does not include % of residence who work from home or have no fixed place of work.

Source: Place of work and residence, Census, 2011

Skills and Labour Supply

Local Migration - What proportion of people move employment within the local area? What are the reasons for employee movement (e.g. wages, progression opportunities)?

1.24 Place of Work and Residence within Coast to Capital Local Authorities, 2011

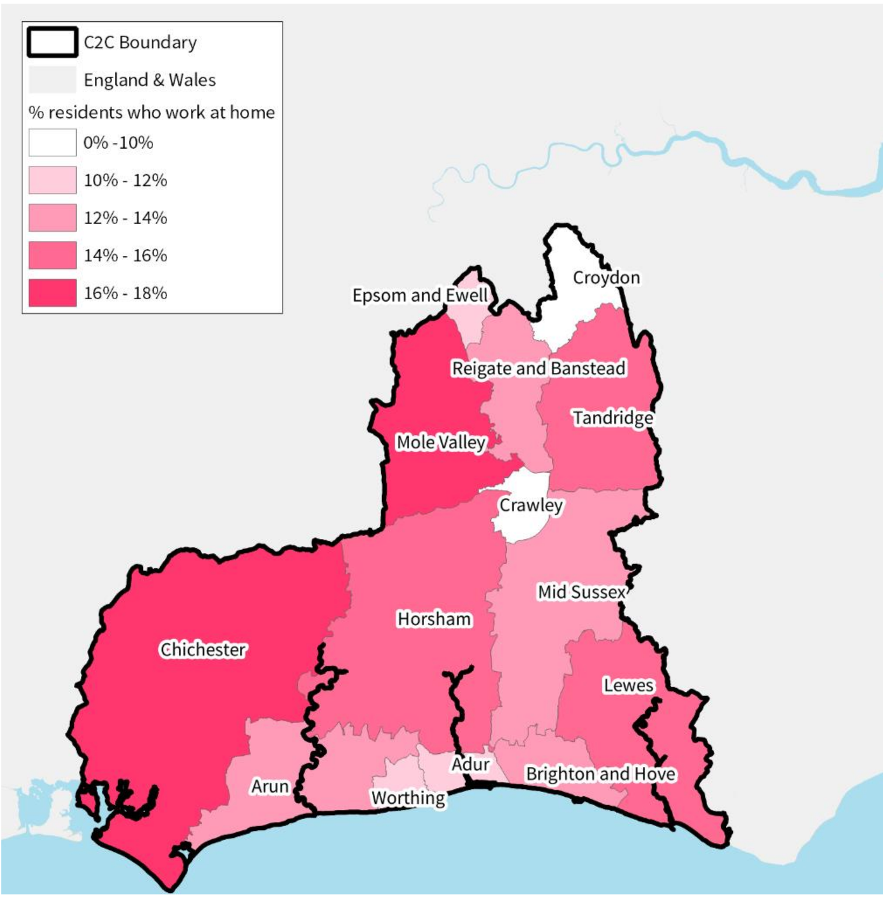
	Place of Residence														
Place of Work	Adur	Arun	Brighton & Hove	Chichester	Crawley	Croydon	Epsom & Ewell	Horsham	Lewes	Mid Sussex	Mole Valley	Reigate & Bans'	Tandridge	Worthing	London
Adur	24%	1%	2%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	6%	0%
Arun	2%	37%	0%	4%	0%	0%	0%	1%	0%	0%	0%	0%	0%	6%	0%
Brighton & Hove	22%	2%	52%	0%	1%	0%	0%	3%	18%	5%	0%	0%	0%	7%	0%
Chichester	1%	15%	0%	44%	0%	0%	0%	2%	0%	0%	0%	0%	0%	2%	0%
Crawley	2%	1%	3%	1%	52%	1%	1%	9%	2%	10%	2%	7%	4%	2%	0%
Croydon	0%	0%	0%	0%	1%	28%	1%	1%	0%	1%	1%	3%	8%	0%	2%
Epsom & Ewell	0%	0%	0%	0%	0%	0%	20%	0%	0%	0%	4%	3%	1%	0%	0%
Horsham	3%	3%	1%	2%	4%	0%	0%	37%	1%	2%	1%	1%	0%	4%	0%
Lewes	2%	0%	3%	0%	0%	0%	0%	0%	33%	2%	0%	0%	0%	1%	0%
Mid Sussex	3%	0%	3%	0%	5%	0%	0%	3%	5%	35%	0%	1%	2%	1%	0%
Mole Valley	0%	0%	0%	0%	2%	0%	5%	2%	0%	1%	28%	5%	1%	0%	0%
Reigate & Banstead	0%	0%	0%	0%	6%	2%	4%	2%	0%	2%	6%	29%	8%	0%	0%
Tandridge	0%	0%	0%	0%	2%	2%	0%	0%	0%	3%	1%	3%	21%	0%	0%
Worthing	14%	8%	2%	1%	0%	0%	0%	2%	1%	0%	0%	0%	0%	46%	0%
London	3%	2%	7%	4%	8%	71%	41%	7%	5%	11%	19%	24%	30%	3%	

Source: Place of work and residence, Census, 2011

Skills and Labour Supply

Local Migration - What proportion of people move employment within the local area? What are the reasons for employee movement (e.g. wages, progression opportunities)?

1.25 % of residents by local authority who work from home (inc. Croydon and Lewes), 2011



1.26 Breakdown of Residents by Local Authority who work from home or have no fixed place, 2011

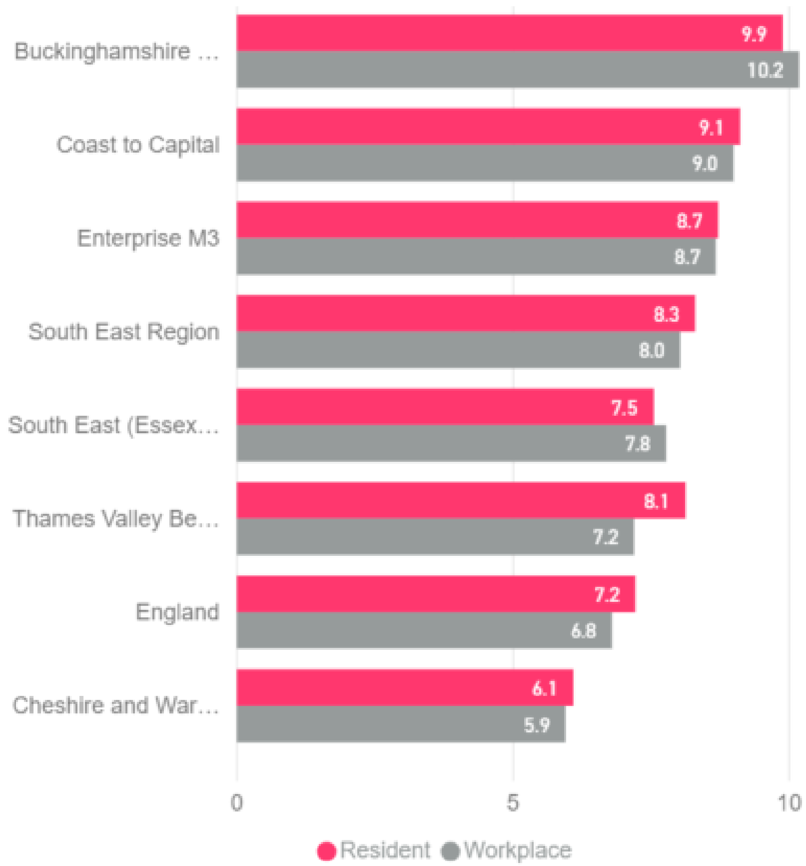
Place of Residence		Place of work: Working from Home (No.)	Place of work: Working from Home (%)
	Adur	3,055	10%
	Arun	8,688	13%
	Brighton & Hove	17,665	13%
	Chichester	9,007	17%
	Crawley	3,724	7%
	Croydon	15,887	9%
	Epsom & Ewell	4,197	11%
	Horsham	9,933	15%
	Lewes	6,481	14%
	Mid Sussex	9,685	13%
	Mole Valley	6,930	16%
	Reigate & Bans'	8,658	12%
	Tandridge	6,579	16%
	Worthing	5,371	11%
	Coast to Capital	**115,860**	**12%**
	London	387,501	10%

Source: Place of work and residence, Census, 2011

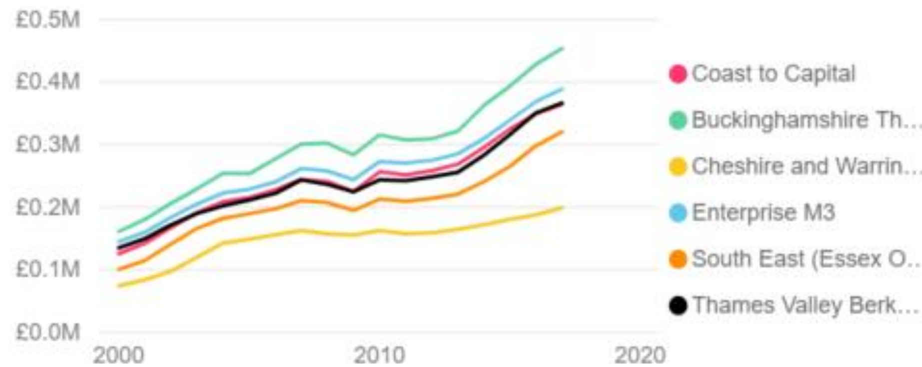
Cross cutting

Housing - How affordable is housing in your area compared with neighbouring areas?

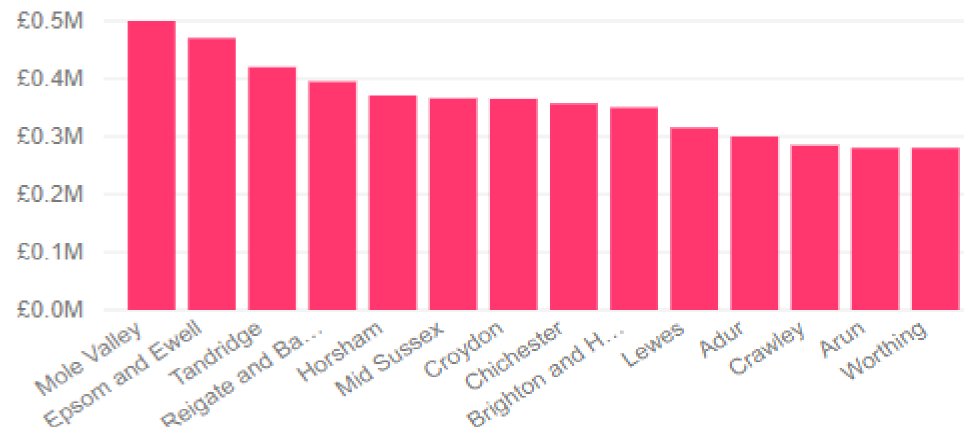
1.27 Ratio of Average Resident and Workplace earnings to average Price of household, 2018



1.28 Average house price growth of Coast to Capital vs Comparators, 2000 - 2017



1.29 Average house price by Coast to Capital Local Authority, 2017



Source: ONS Housing Affordability, 2018

Policy

Relevant local and regional skills and labour market policy for Coast to Capital LEP

1.30 Regional Policy Review

Policy / Ambition	Description
C2C Skills for Strategy (2015)	• The strategy's ambition is to support local businesses to access and develop individuals with the skills required to compete internationally and raise outcomes set out in the C2C Strategic Economic Plan. • Three priorities: simulate the demand for skills by encouraging business ambition; ensure skills provision meets the needs of the C2C region's and ensure people make informed decision about their learning and career choices. • C2C will support these priorities through: encouraging more businesses to hire apprenticeships and increase training/ skill investment; establishing focussed internships for graduates and raising the profile of STEM career opportunities.
Skills 360 – Skills Priorities (2019)	• The report outlines the key skills priorities in the C2C region (based on early research and consultation work) for the Skills 360 Board to address and • 11 early skills priorities for C2C were identified as: places; industry sectors; adults – workforce development, training and upskilling; employability skills; vocational skills; digital skills; careers information advice and guidance; apprenticeships; qualifications and education reforms; skills for all.
C2C Strategic Plan 2018-2030	• The SEP sets out a vision to raise the C2C area's productivity and competitiveness, through skills investment informed by international trade and capitalising opportunities for growth i.e. proximity to London and Gatwick Airport. • Two of the eight priorities aligns with employment and skills. *P4 – create skills for the future* will involve seeking funding for training opportunities and adult workforce with the skills future employers need. *P5 – pioneer innovation in core strengths* aims to grow a stronger University presence in the on business innovation. • Actions for C2C set out in P4 are: establishing a C2C Employment and Skills Board to strengthen education and business partnerships and inform careers guidance for young people; understand capital investment requirements to deliver effective skills provision; and prioritising digital skills among

Source: Desk Based Research

Policy

Relevant local and regional skills and labour market policy for Coast to Capital LEP

1.31 Local Policy Review

Policy / Ambition	Description
Mole Valley Prosperity Strategy 2028	• The strategy sets out a vision to be recognised as a prime business location which attracts creative and innovative talent. • Six priorities: retaining and growing existing businesses; encouraging a more entrepreneurial and enterprising business culture; improving the skills workforce; improving the re-and-inward-investment opportunities for business; improving the rural and visitor economy; improving the business • Under P3 (improving the skills and education of the workforce), Mole Valley plans to improve local engagement with schools; encourage more traineeships; establish a Business Education Forum to improve the skills match between industry and education; ensure there are work experience address employability and upskilling in areas of deprivation through creating social enterprises
West Sussex County Council Economic Plan 2018-2023	• The Plan aims to attract businesses and people to work in West Sussex, encourage entrepreneurship and become a prosperous place with a strong • Two of the five priorities strongly align with the employment and skills agenda: (P2) maximising the opportunities from Gatwick; and (P5) enabling a • Under P2, West Sussex LA will work with partners to promote opportunities / routes into STEM and higher level skilled jobs. In tandem, businesses challenges and skill gaps. • Under P5, key actions include: collaboration between business and skill providers; an employer-led approach to pilot and test solutions to address skill opportunities for older workers, focus business support provision on addressing recruitment needs (e.g. hiring apprenticeships); improve
Brighton and Hove Employment and Plan 2016-2020	• Launched in 2016, the City Employment and Skills Plan has three overarching priorities: 'no one left behind' by moving long-term residents into transitions through increased take-up in apprenticeships and enabling businesses and workers to benefit from growth, particularly targeting high- • To support delivery, four objectives are set out, which will be addressed through 4 Action Groups. These are to: work better with employers to improve skills infrastructure in Brighton and Hove's growth sectors; target support services to transition BAME, disability groups and under-business growth by investing in employment space.

Source: Place of work and residence, Census, 2011

Policy

Relevant local and regional skills and labour market policy for Coast to Capital LEP

1.31 Local Policy Review (Continued)

Policy / Ambition	Description
An Economic Strategy for Brighton and 2018-2023	• The strategy looks to establish Brighton and Hove as one of the UK's most economically vibrant, inclusive and future facing cities. Two of the five priorities have the best fit ensure all residents are able to access employment, progress in work and build careers. (P4) 'a fair city' - promotes participation and engagement across communities to • Through P3, a Productivity Commission will be established to examine the employment and skills provision landscape across the city and explore links with current / future deliver the following outcomes: better in-work progression, a more dynamic local labour market and increased apprenticeship opportunities. • Through P4, efforts will focus on developing long-term community capacity and encouraging businesses to adopt the Brighton Living Wage, increase training investment deliver the following: improved workforce security, narrowing of employment gaps, better socio-economic outcomes for under-represented groups.
Tandridge Economic Proposition 2022	• The Borough's vision is to strengthen and grow the economy to increase competitiveness and prosperity. Five priorities are outlined: improve and increase employment centres; encourage high value and higher skilled employment; and provide support for business growth. • Under P4 (encourage high value and higher skilled employment), key objectives for delivery are to: encourage / support high-tech businesses; develop meaningful work of HE provision and boost quality of FE provision; promote STEM careers and related activities in schools; and support SMEs to access apprenticeships.
Croydon Skills Employment Plan 2016-	• The strategy sets out ambitions to have Croydon's residents acquire the future skills employers need and benefit from economic growth. • There are five core priorities which align with the C2C LEP and London LEP objectives. These are: to deliver a job brokerage to maximise benefits from regeneration and focussed training to meet employment demand in growth sectors; create effective career pathways for young people; provide support for residents with multiple barriers to provision and high skills vocational training to support the knowledge economy.
Reigate and Banstead Local Plan: Core (2014)	• Sets out ambitions to become one of the region's most desirable and attractive areas, where people who live and work in the Borough can benefit from a prosperous • The Core Strategy identifies education and skills as one of the areas of focus, in particular: supporting improved access to existing and new FE / HE / education and skills opportunities in Redhill. • The Borough plans to work with Surrey County Council, skills providers including East Surrey College and neighbouring authorities to deliver these outcomes.

Source: Desk Based Research

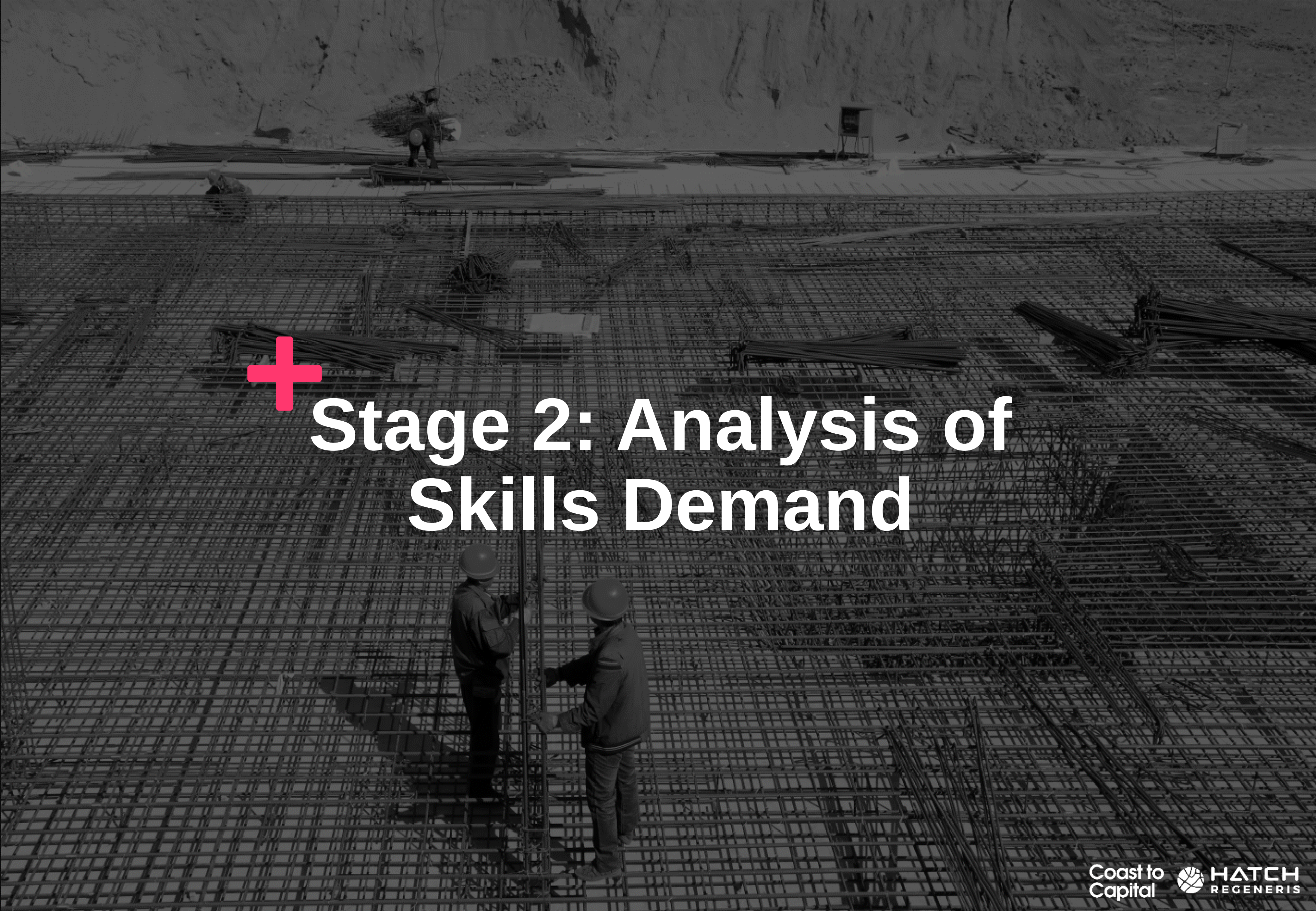
Policy

Relevant local and regional skills and labour market policy for Coast to Capital LEP

1.32 Local Authority inclusion of Skills Priority Areas, 2019

	Local Authorities													
Priority Areas	Crawley Borough Council	Adur and Worthing Councils	Brighton and Hove City Council	Chichester District Council	East Sussex	London Borough of Croydon	Epsom and Ewell Borough Council	Horsham District Council	Lewes District Council	Mole Valley District Council	Reigate and Banstead Borough Council	Coastal West Sussex Partnership	Tandridge District Council	West Sussex County Council
Increase employability of young people	X					X			X			X		
Improve digital skills			X											X
Increase uptake of vocational training and apprenticeships	X	X	X		X		X	X		X		X	X	
Address skills gap in STEM	X	X			X			X				X		X
Support for the most disadvantaged / those furthest from the workforce	X		X		X						X			
Increase work experience opportunities										X	X			
Engagement between schools and employers		X			X					X		X		X
In-work development and upskilling	X		X		X									
Tap in to the potential of an ageing workforce			X											X
More engagement with schools/FE/HE on careers and opportunities										X	X		X	
Improved access to adult education / Lifelong learning									X					
Issue around out-commuting			X						X				X	X
Match skills to business needs				X		X	X	X	X					
Increase employability of young people	X					X			X			X		

Source: Desk Based Research

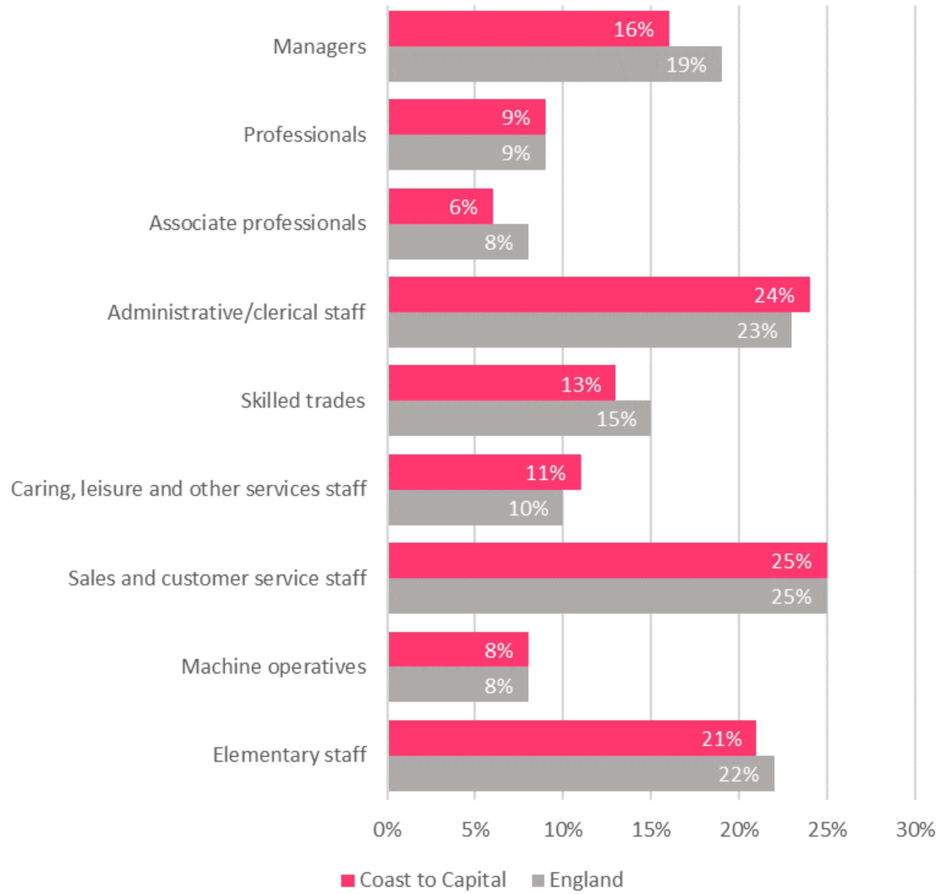


Stage 2: Analysis of Skills Demand

Skills and Labour Supply

Skills Needs and Shortages - What skills are employers demanding? Are these skills transferrable or specialist? How are these skills likely to change in the next 5 – 10 years?

2.1 Employment Reported Skills Gap Breakdown by Occupation, 2017



2.2 % of Employers Reporting Skills Shortages in Workforce, 2017

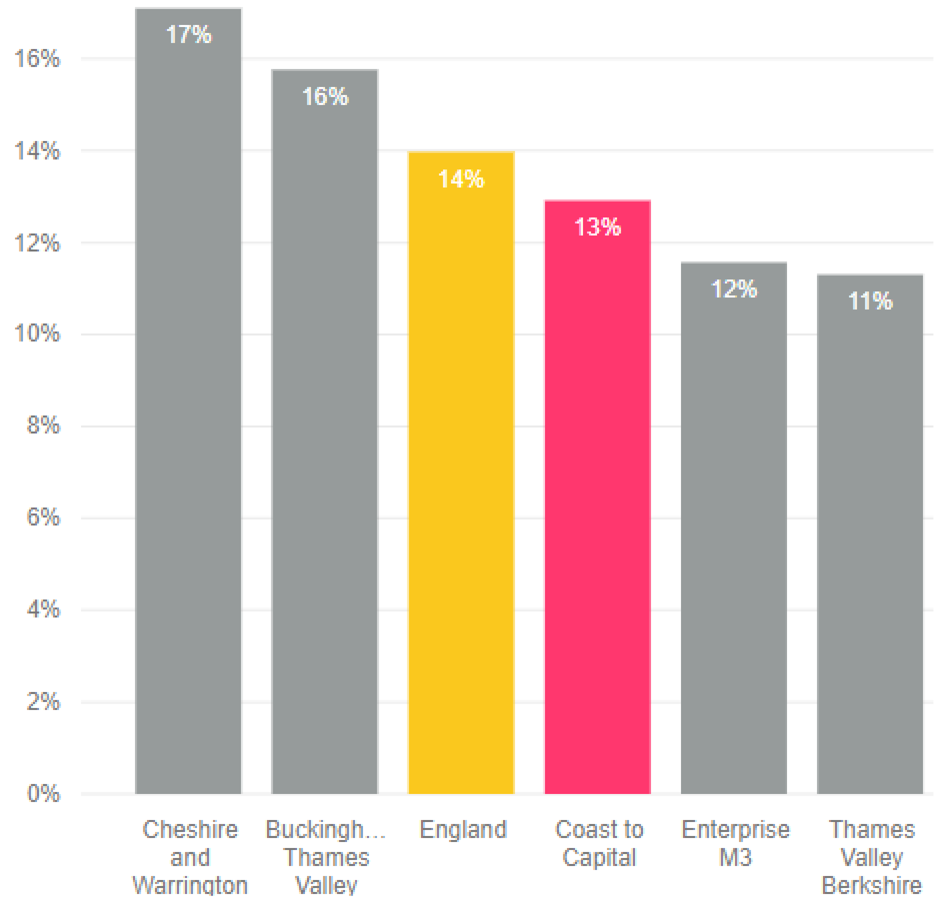
Name	South East	England
Specialist skills or knowledge needed to perform the role	25%	31%
Ability to manage own time and prioritize own tasks	8%	9%
Customer handling skills	7%	7%
Solving complex problems requiring a solution specific to the situation	6%	5%
Team working	6%	5%
Knowledge of products and services offered by your organization and organizations like yours	4%	7%
Advanced or specialist IT skills	3%	4%
Managing or motivating other staff	3%	3%
Reading and understanding instructions, guidelines, manuals or reports	3%	3%
Sales skills	3%	3%

Source: Employer Skills Survey, ONS (2017)

Skills and Labour Supply

Skills Needs and Shortages - What skills are employers demanding? Are these skills transferrable or specialist? How are these skills likely to change in the next 5 – 10 years? Cont'd

2.3 Proportion of Businesses with Skills Gaps, 2017

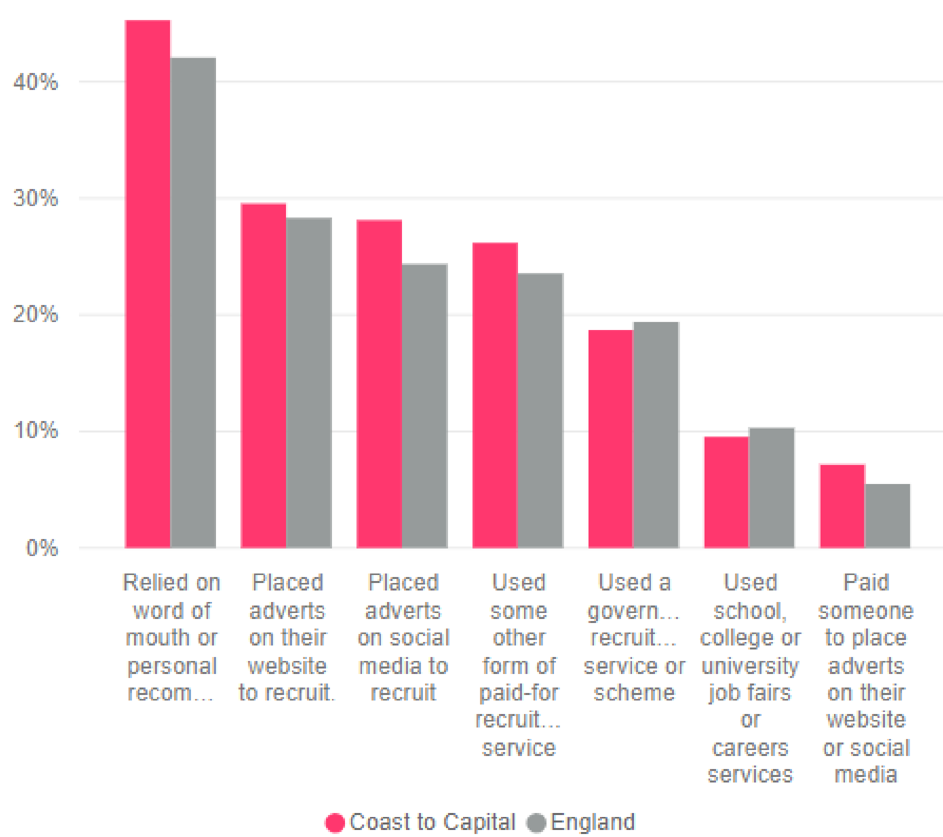


Source: Employer Skills Survey, ONS (2017)

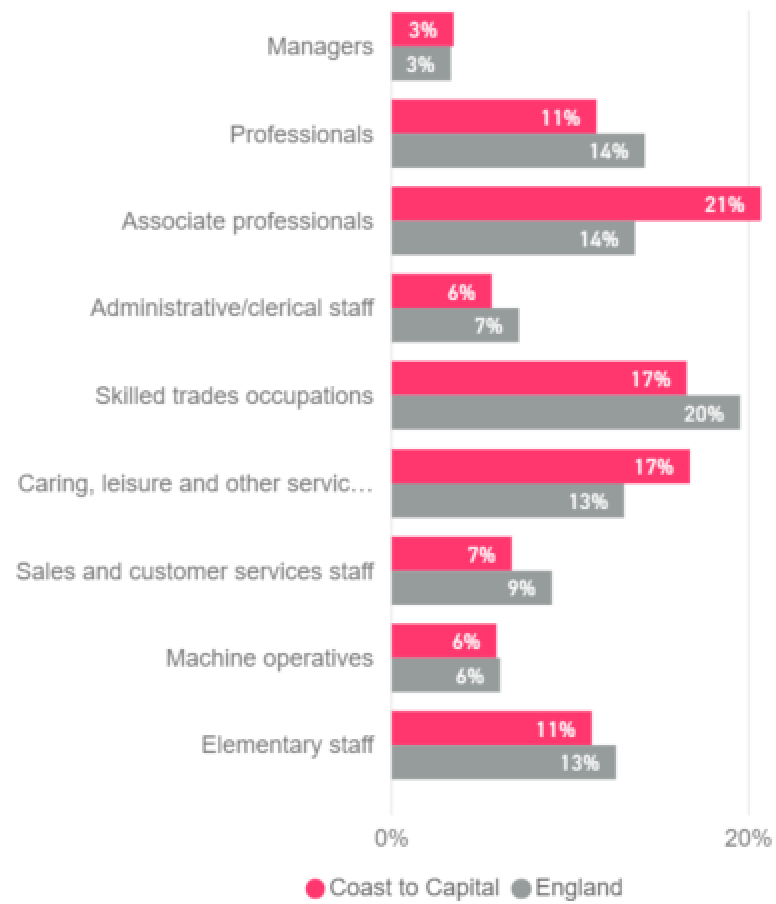
Skills and Labour Supply

Vacancies & Recruitment - What are the sectors and occupations with the largest proportion of new vacancies? Do these require a specific qualification level or course? What do current recruitment practices look like?

2.4 Type of Recruitment Method Used in the Last 12 months, 2017



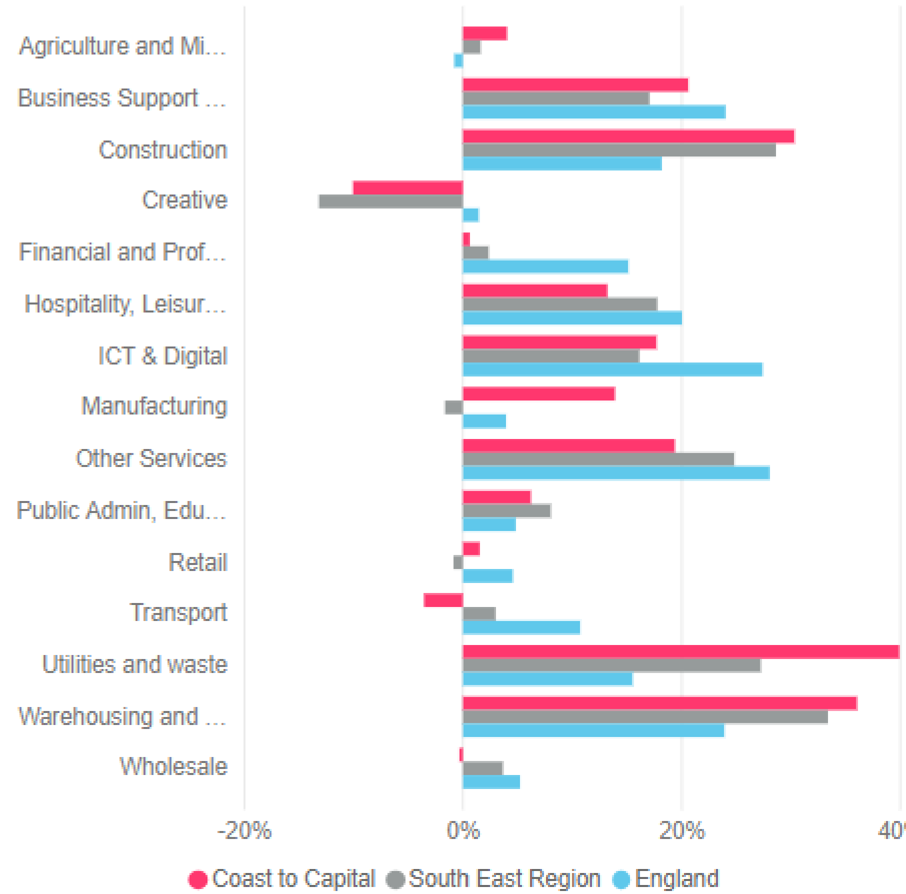
2.5 Employer Reported Hard to Fill Vacancies by Occupation in Coast to Capital vs England, 2017



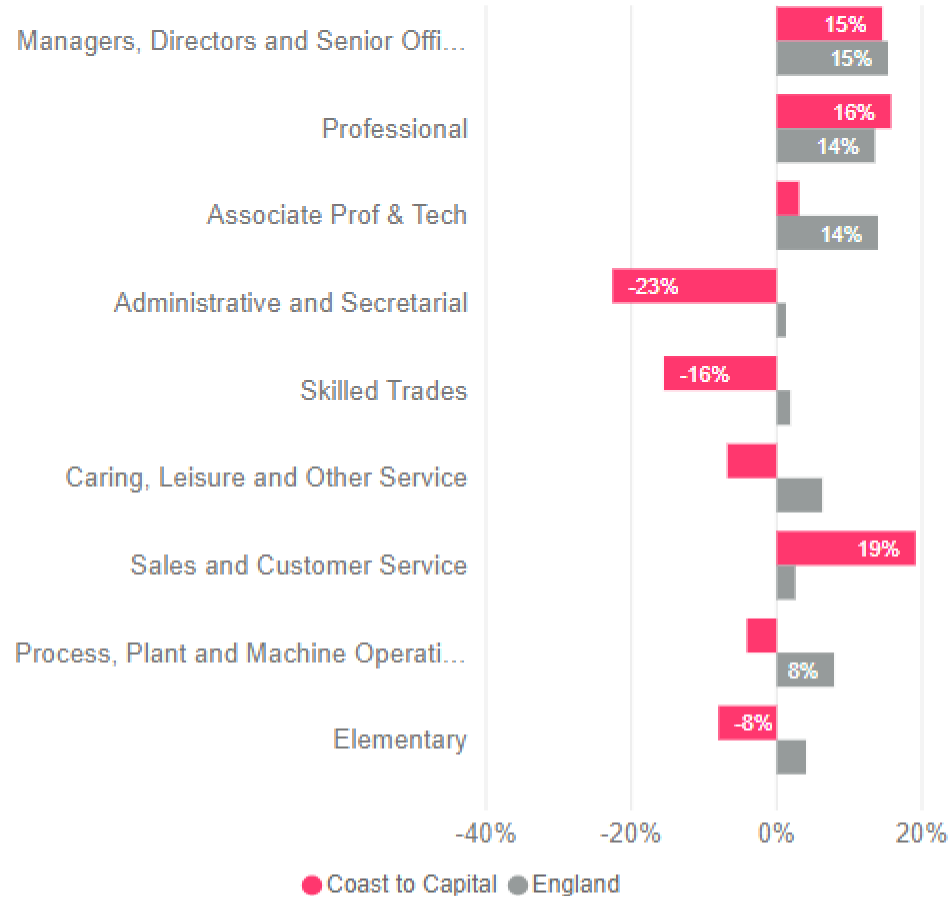
Skills and Labour Supply

Sector and Occupation Growth - Which sectors and occupations are expanding? What are the new emerging and growing sectors?

2.6 Employment Growth by Sector, 2012 - 2017



2.7 Resident Occupation Growth, 2013 - 2018

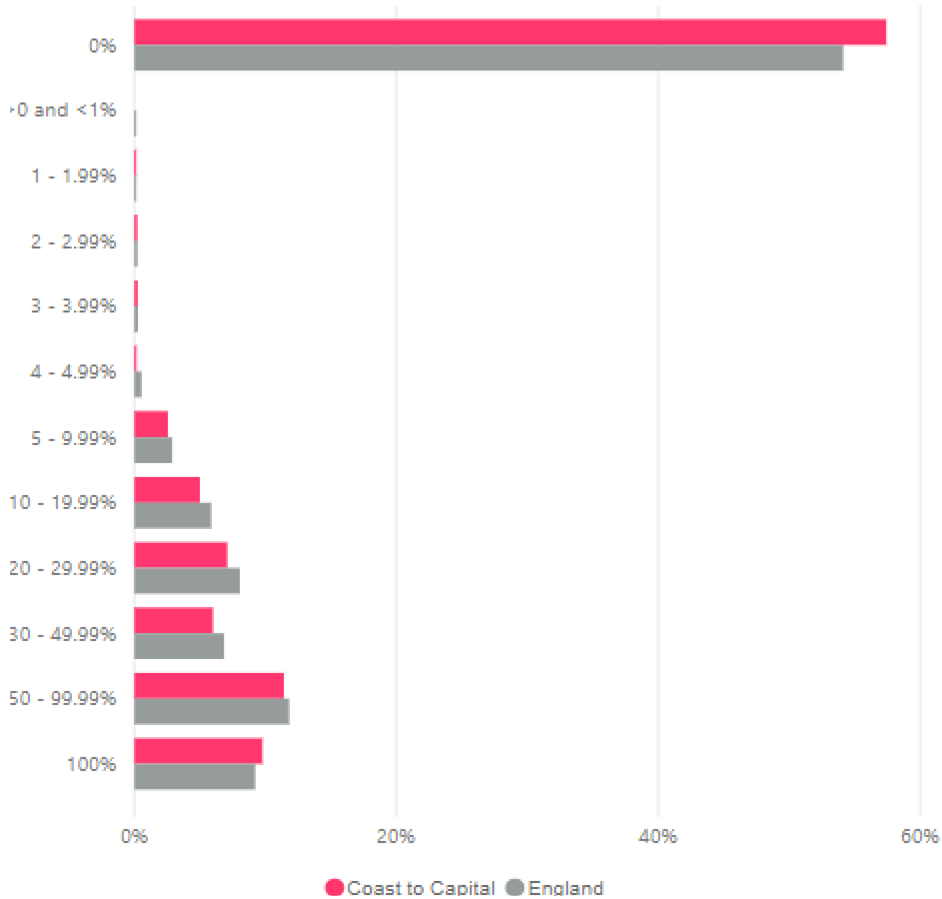


Source: Business Register and Employment Survey, ONS (2017); Annual Population Survey, ONS (2018)

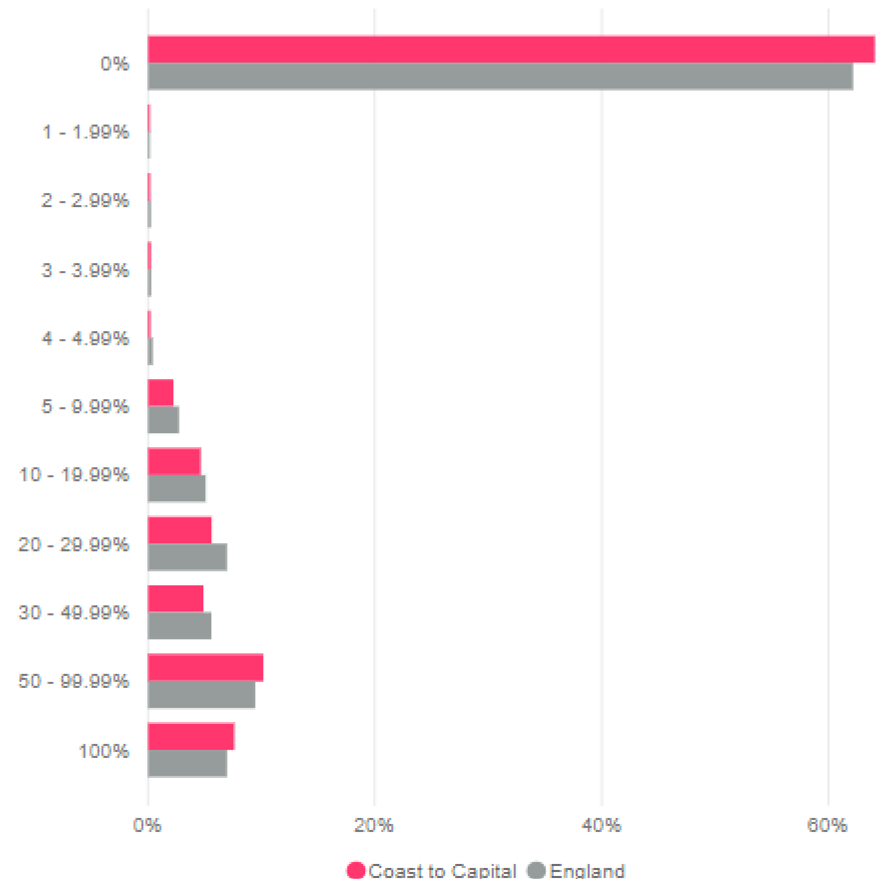
Cross Cutting

Over-qualification - What proportion of employees have higher level skills than those required in their current jobs?

2.8 Proportion of Mis-Matched Staff (i.e. overqualified for the role), 2017



2.9 Proportion of Under-Utilised Staff (i.e. overqualified and over experienced for the role), 2017

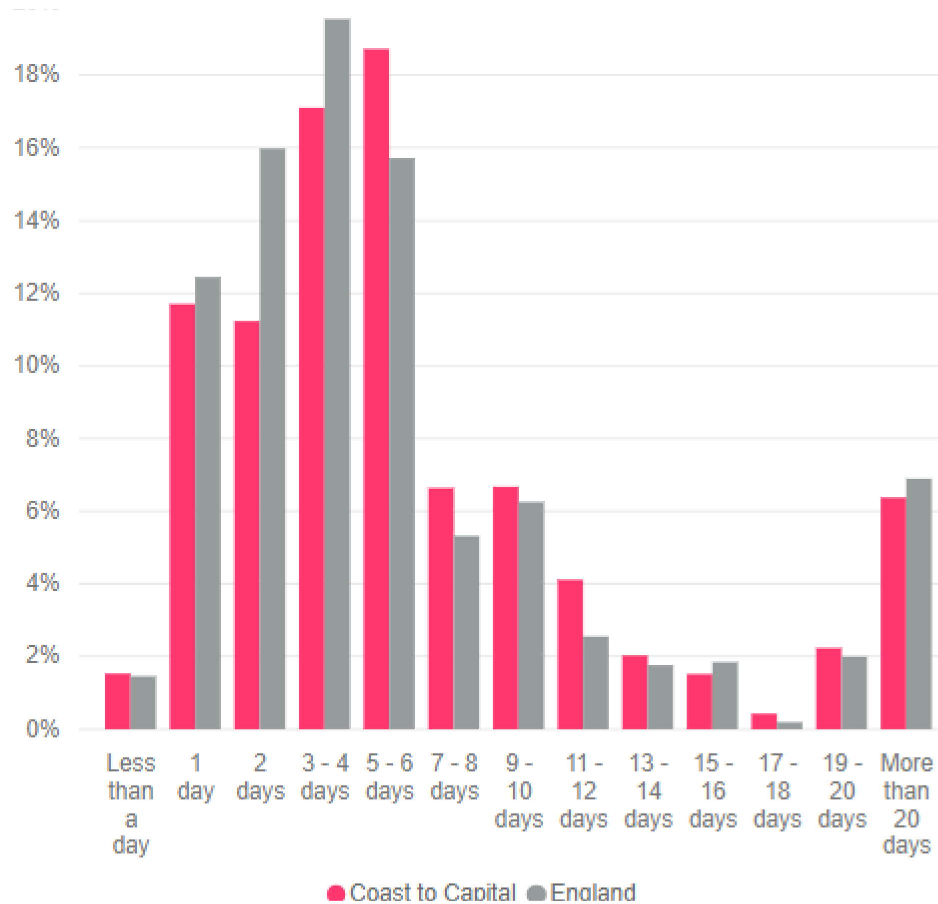


Source: Employer Skills Survey, ONS (2017)

Cross Cutting

Employer investment in Skills - What is the rate of employer investment in skills? Which sectors / occupations are investing in their workforce and at what skills levels? For employers who are not investing in skills training, what are the reasons? How large is training investment? What are the main barriers to skills development?

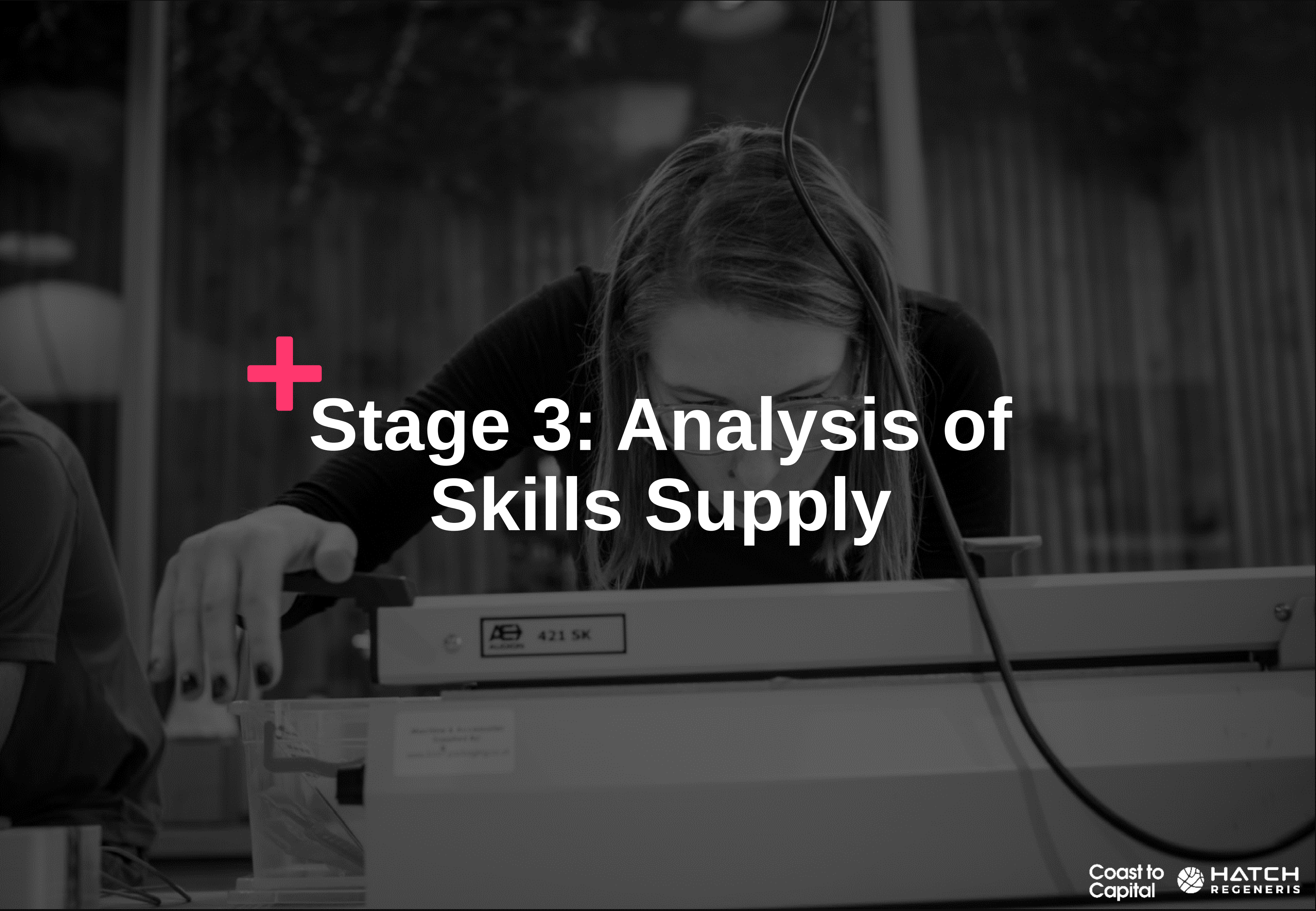
2.10 Average Number of Training Days in the Last 12 months, 2017



2.11 % of Staff Trained in the Last 12 months in Coast to Capital, 2017

Proportion of Staff	Coast to Capital	England
0 - 20%	5%	7%
20 - 40%	16%	17%
40 - 60%	15%	17%
60 - 80%	12%	13%
80 - 100%	4%	4%
100%	40%	36%
>100%	8%	7%

Source: Employer Skills Survey, ONS (2017)



Stage 3: Analysis of Skills Supply

Skills and Labour Supply

Barriers to Provision - What are the barriers to take up courses and other training provisions?

3.1 Proportion of Businesses who have Faced Barriers to Training
In the last 12 months, 2017

Name	South East	England
Lack of funds for training / training expensive	49%	51%
Can't spare more staff time (having them away on training)	41%	49%
Hard to find the time to organise training	14%	15%
Other	9%	3%
A lack of appropriate training / qualifications in the subject areas we need	6%	5%
Staff now fully proficient / don't need it	5%	3%
Staff not keen	3%	4%
Difficulty finding training providers who can deliver training where or when we want it	2%	4%
A lack of good local training providers	1%	3%
None	1%	3%

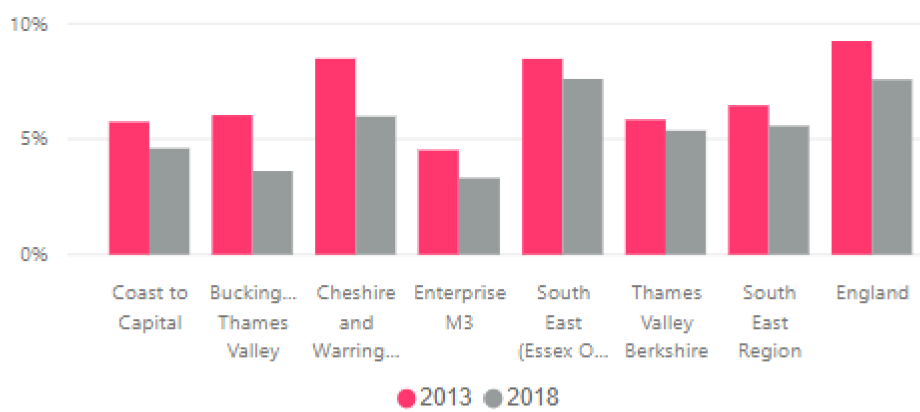
Source: Employer Skills Survey, ONS (2017)

Skills and Labour Supply

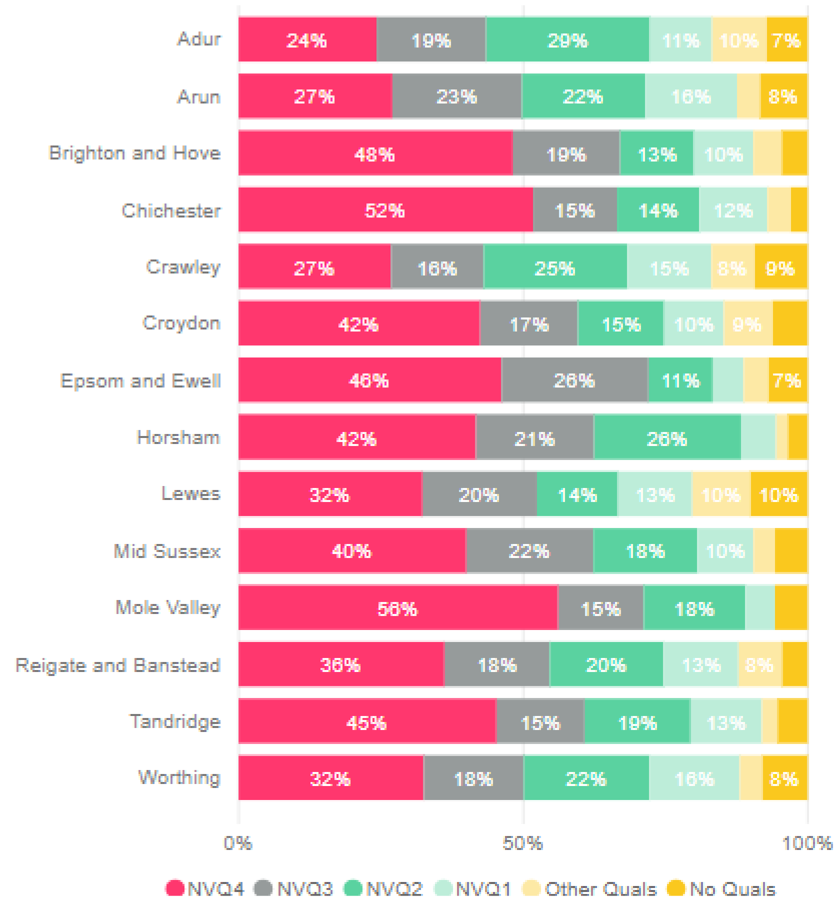
Skills within the Local Population - What qualifications and skills do the population hold? Are they sector / occupational specific?

3.2 Proportion of Residents with Level 4 Qualifications and Above, 2013 - 2018

3.3 Proportion of Residents No Qualifications, 2013 - 2018



3.4 Breakdown of Skills Level by Coast to Capital Local Authorities, 2018

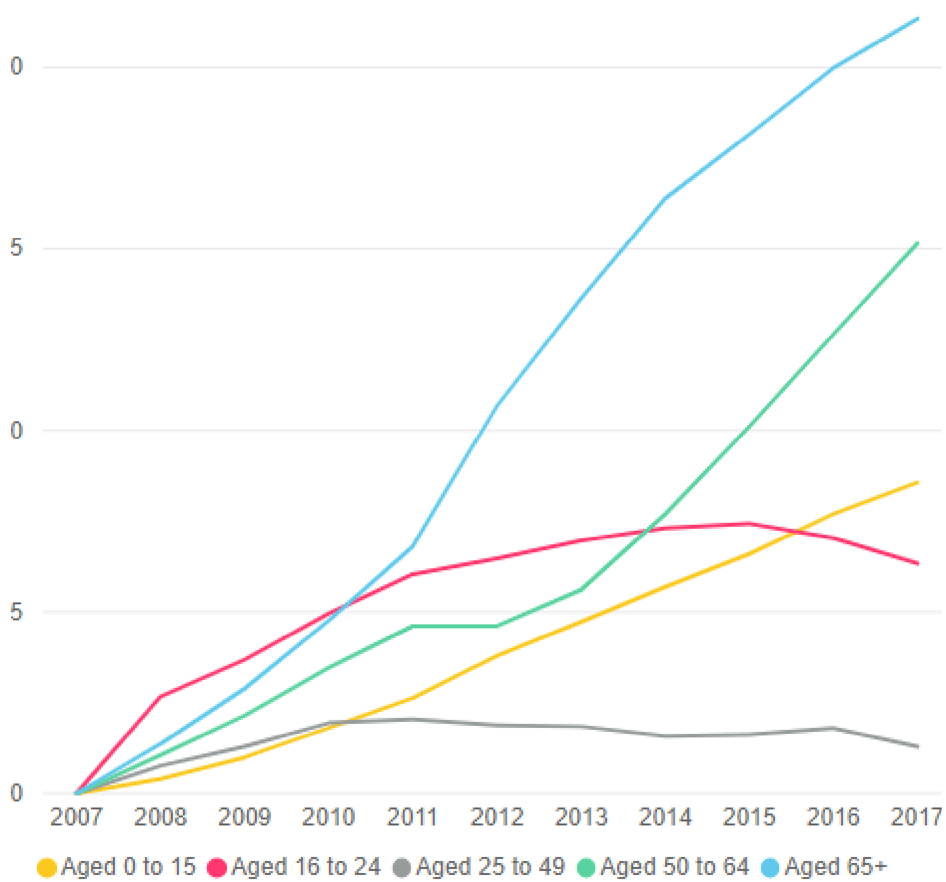


Source: Annual Population Survey, ONS (2018)

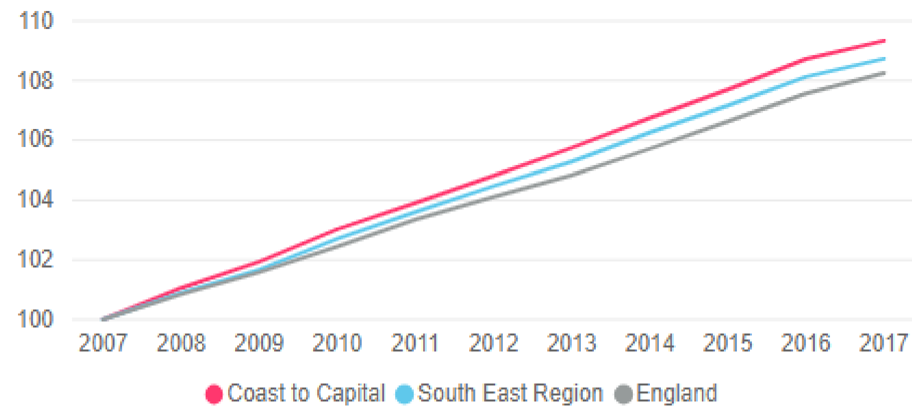
Skills and Labour Supply

Changing Demographic Profile - How has the demographic profile of the local area changed over the past 5 years? How will this impact on future labour supply?

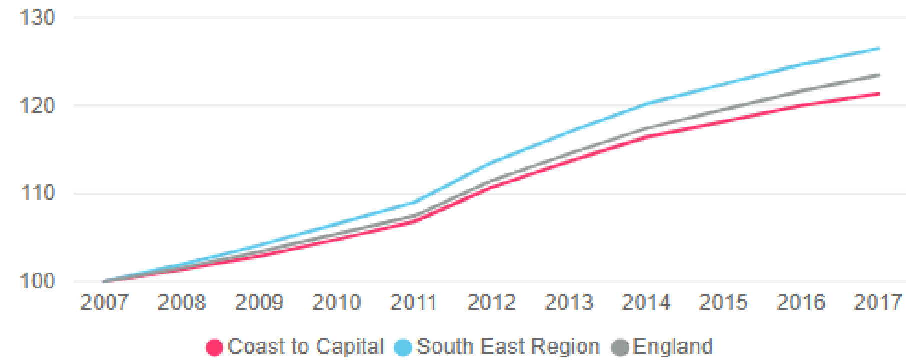
3.5 Indexed Population Growth by Age Group, 2007 – 2017 (2007 = 100)



3.6 Indexed Population Growth, 2007 – 2017 (2007 = 100)



3.7 Indexed Working Age Population Growth, 2007 – 2017 (2007 = 100)

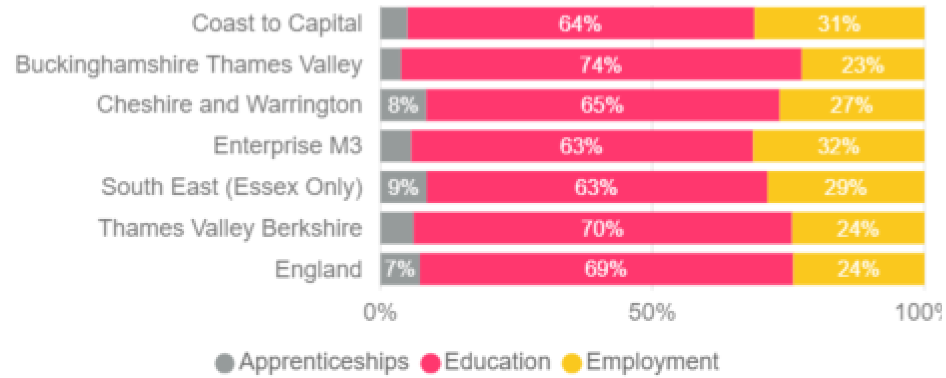


Source: Mid-Year Population Estimates, ONS (2018)

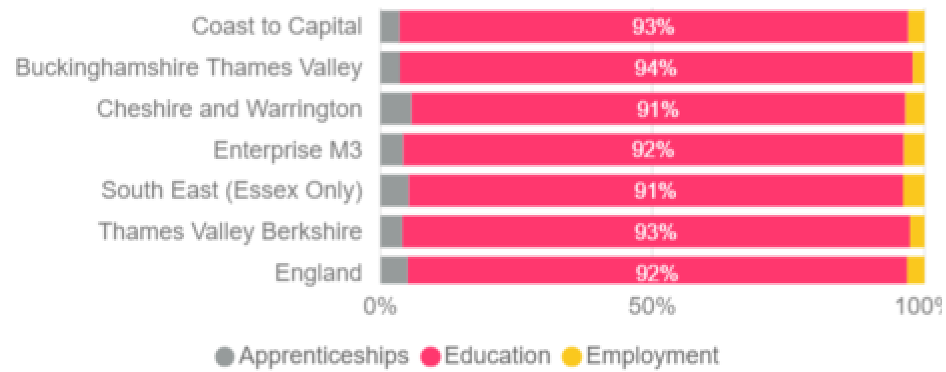
Skills and Labour Supply

Leaving Destinations - What proportion of school leavers go into Further Education or university?

3.8 Destination of Key Stage 4 (Secondary School) in Coast to Capital, 2017



3.9 Destination of Key Stage 5 (6th Form, College, Further Education) in Coast to Capital, 2017

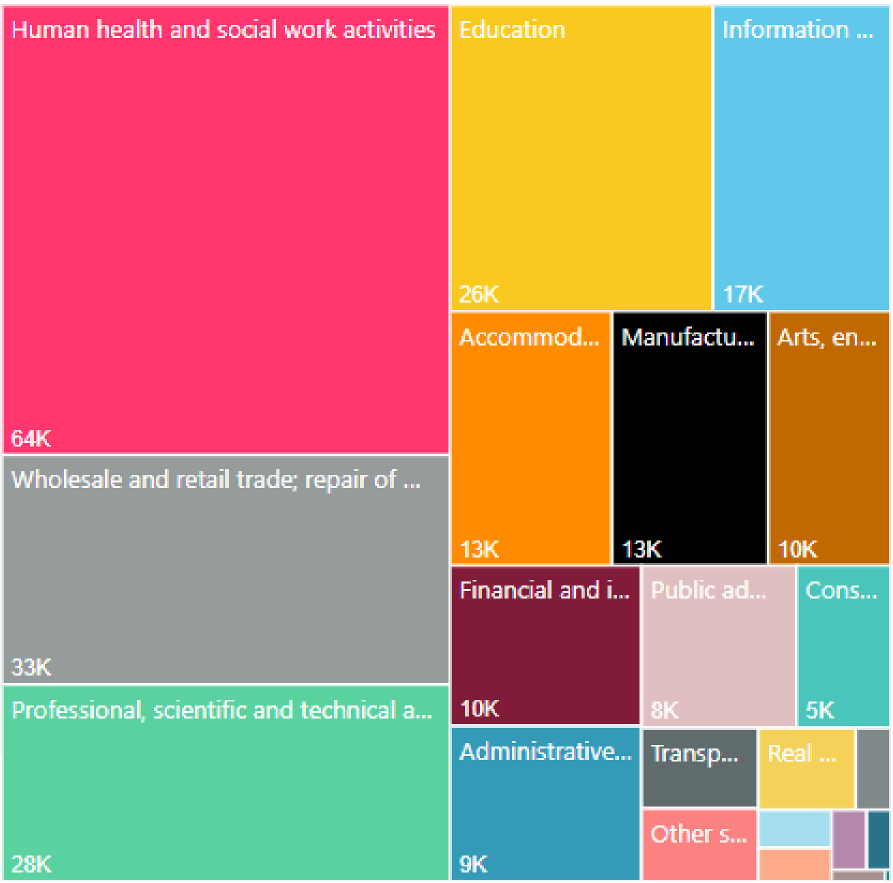


Source: Destinations of KS4 and KS5 pupils, Department for Education (2017)

Economy and Labour Demand

Graduate Destinations (by Sector) - What is the proportion of education leavers start in high growth sectors / occupations?

3.11 Industries of University Graduate Jobs Nationally, 2017

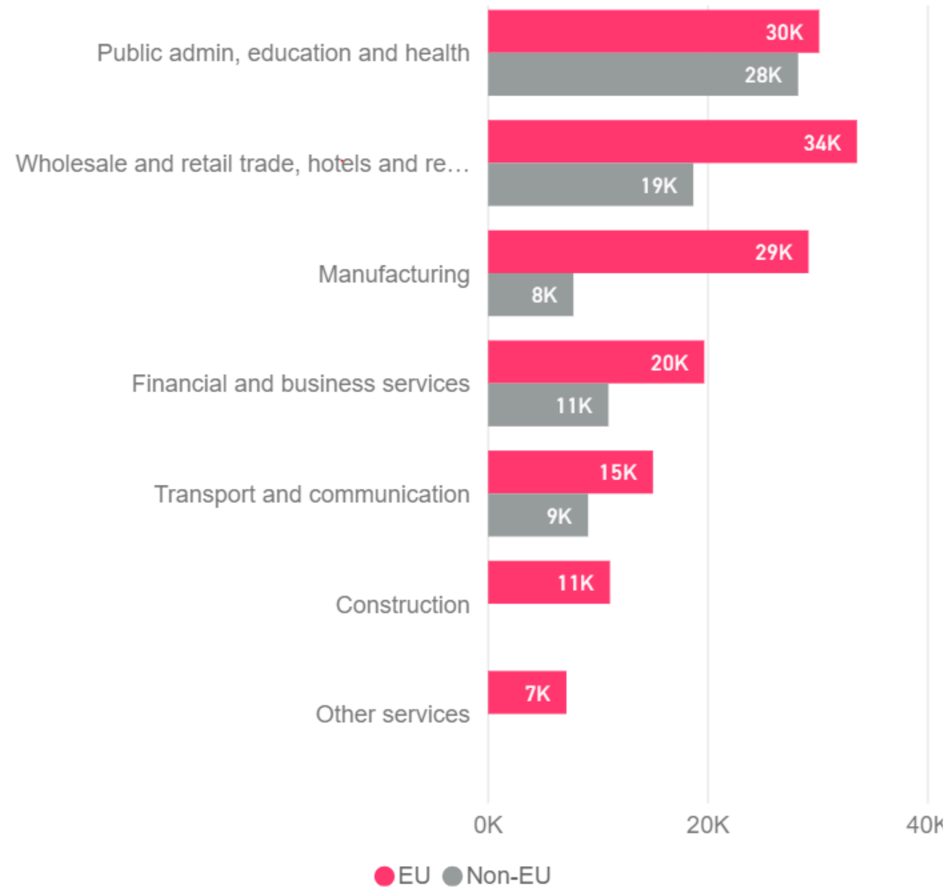


Source: HESA (2017); DfE (2017)

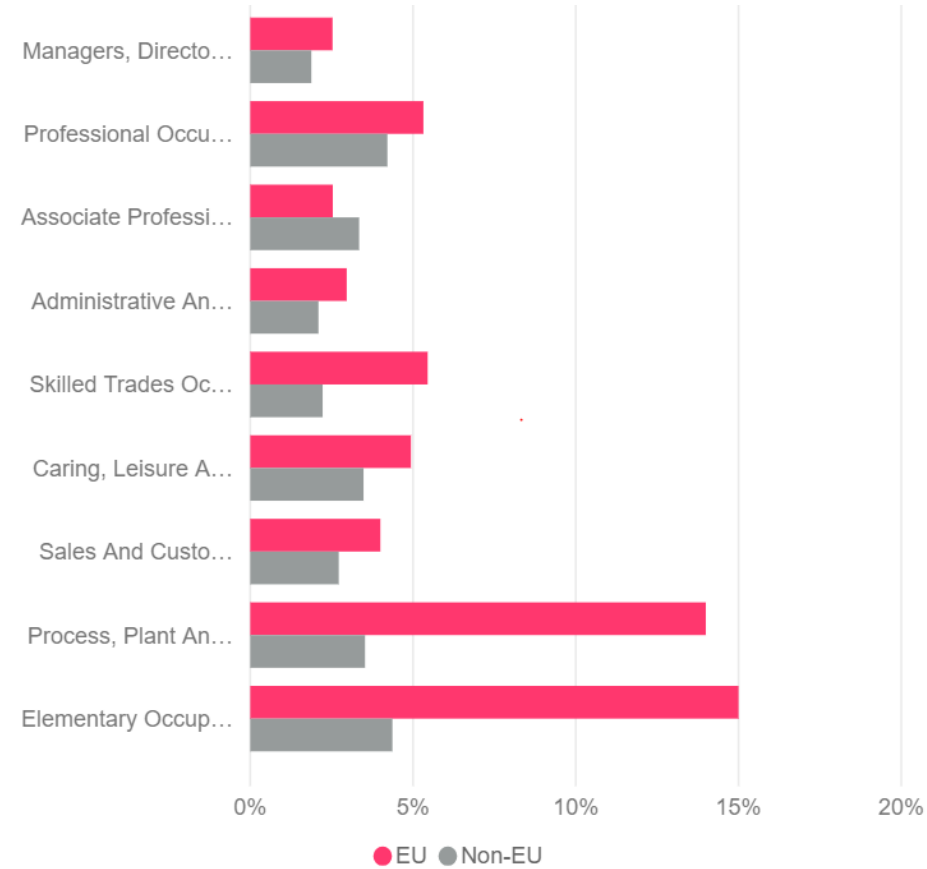
Cross Cutting

Brexit Impact - What impact would a restriction on EU migration have on labour supply? How would this differ by sector and occupation?

3.12 Migrant Workers by Sector in South East Region, 2016



3.13 Migrant Workers by Occupation in South East Region, 2016

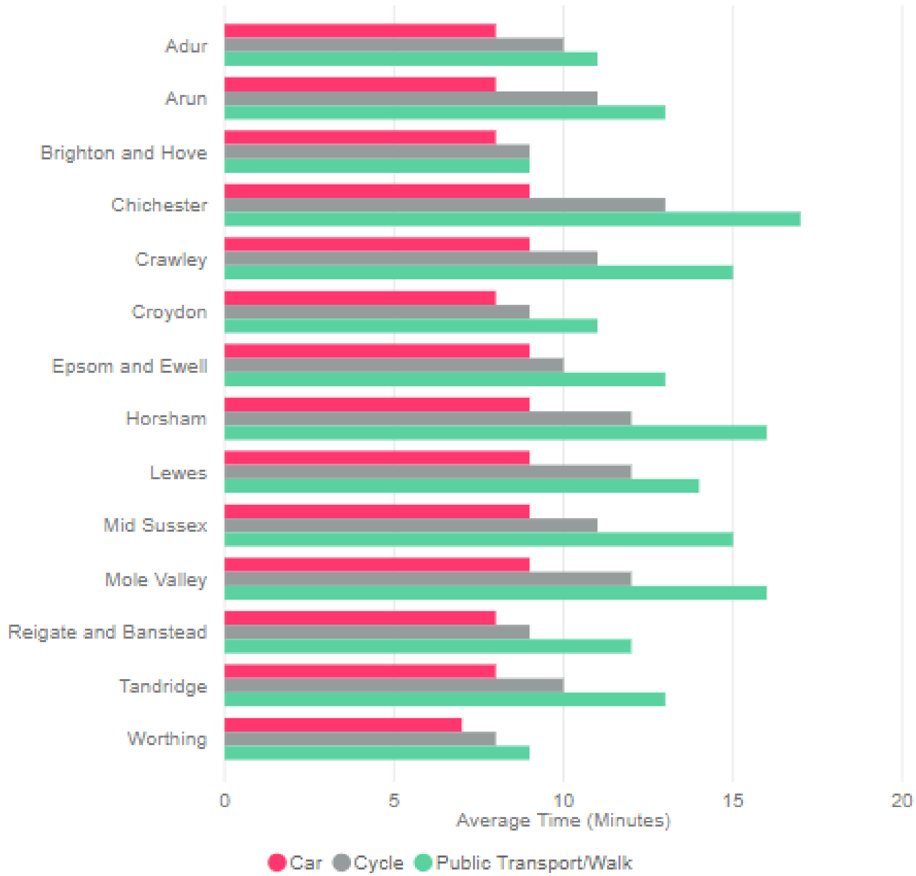


Source: International Immigration and the Labour Market, ONS (2016)

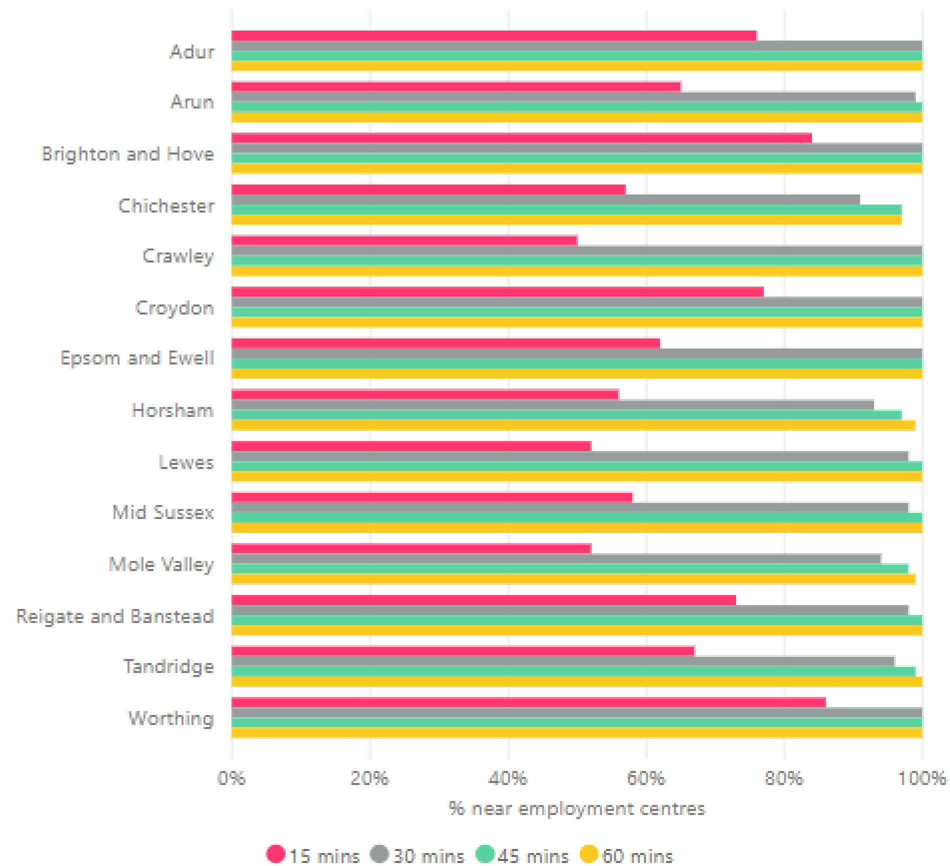
Cross Cutting

Commuting - What is the average commuter distance and time? How do these journeys differ by locality?

3.14 Average time Taken to Reach Employment Centre by Mode Of Travel, 2016



3.15 % of residents within 15/30/45/60 minute catchment via **Public transport and Walking,** 2016



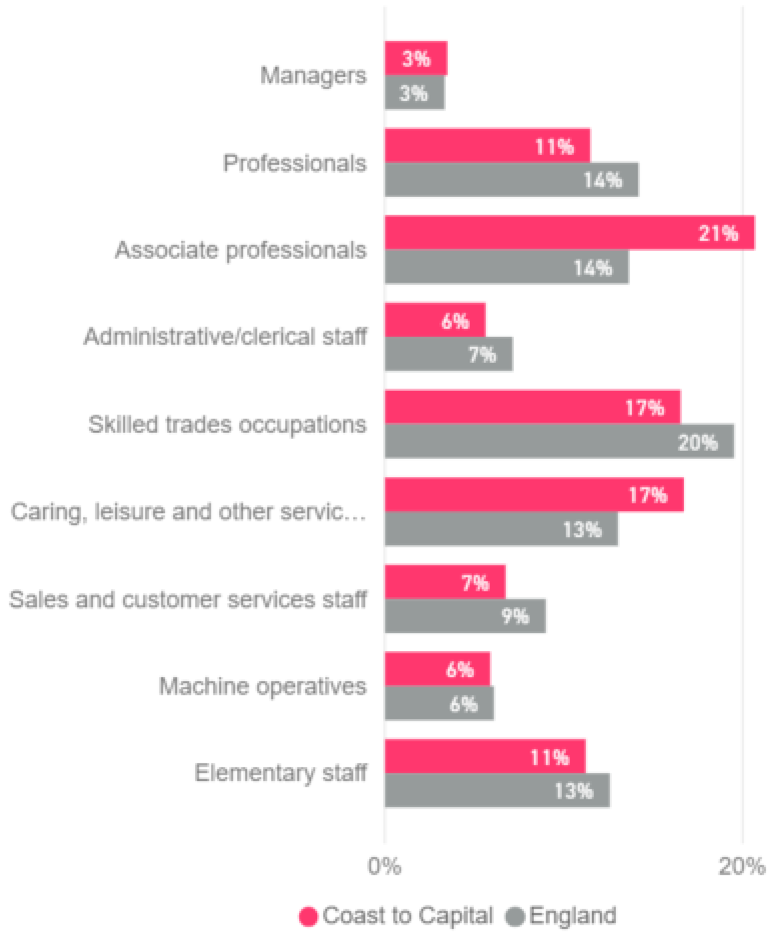
Source: Journey to Key Services, Department for Transport (2016)

Stage 4: Mapping of Supply and Demand

Skills and Labour Supply

Skills Issues - What evidence is there of skills issues, now or in the future (skills shortages, mismatches and under-utilisation)?

4.1 Skills Shortage Vacancies by Occupation



Source: Source: Employer Skills Survey, ONS (2017)

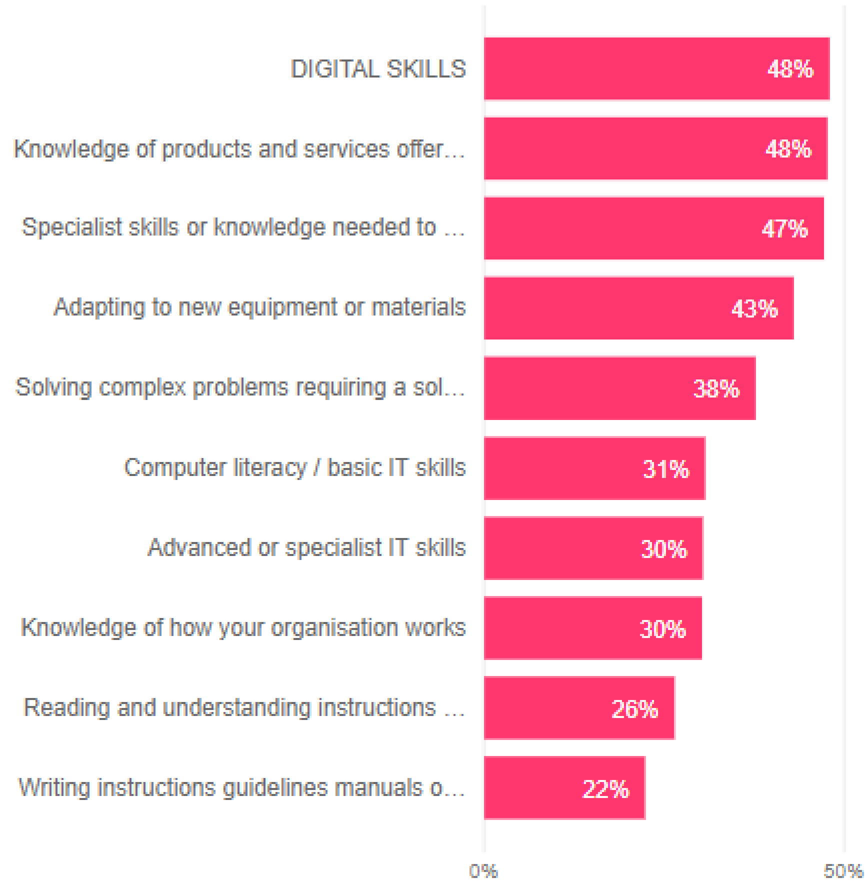
Skills and Labour Supply

Meeting Employer Demand - Are education providers delivering courses to meet employer demand?

4.2 Employer Reported Causes of Skills Gaps, 2017

Name	Coast to Capital	England
New to the role/training not complete	85%	78%
Staff lack motivation	18%	27%
The introduction of new technology	14%	18%
The introduction of new working practices	17%	22%
Their training is currently only partially completed	64%	62%
They are new to the role	69%	60%
They have been on training but their performance has not improved sufficiently	19%	27%
They have not received the appropriate training	22%	25%
Transient skills gaps	39%	28%
Unable to recruit staff with the required skills	22%	26%

4.3 Employer Reported Skills that Need Developing Nationally, 2017



Source: Source: Employer Skills Survey, ONS (2017)

Economy and Labour Demand

Shift to Larger Sectors? - Is there a shift of labour to sectors / industries and occupations that are larger? Is this due to competing sectors / occupations?

		Employment in Coast to Capital				Businesses in Coast to Capital			
Name	Total Jobs (2017)	Total Employment (2017)	% total employment	LQ vs England	% Employment Growth (12 – 17)	Total Businesses	% total business	LQ vs England	% Business Growth (12 - 17)
Creative & Professional	Business Support Services	62,805	9%	1.0	21%	6,920	9%	1.1	40%
	Creative	13,880	2%	0.9	-10%	4,910	6%	1.3	15%
	Financial and Professional Services	95,685	13%	1.0	1%	17,205	21%	1.1	20%
	ICT & Digital	23,910	3%	0.9	18%	6,580	8%	1.2	21%
	Other Services	12,330	2%	1.0	19%	2,835	4%	1.0	10%
Support Industries	Construction	36,450	5%	1.1	30%	9,785	12%	1.1	27%
	Transport	28,180	4%	1.3	-4%	1,325	2%	0.6	11%
	Warehousing and Logistics	8,720	1%	0.7	36%	555	1%	0.5	19%
	Wholesale	29,120	4%	1.0	0%	3,045	4%	0.9	-3%
Local Services	Hospitality, Leisure and Rec	77,845	11%	1.1	13%	6,715	8%	1.0	15%
	Retail	82,290	12%	1.0	1%	9,490	12%	1.0	10%
Industrial	Agriculture and Mining	10,350	1%	1.1	4%	1,845	2%	0.6	6%
	Manufacturing	36,405	5%	0.7	14%	2,545	3%	0.8	2%
	Utilities and waste	9,820	1%	1.3	40%	345	0%	0.9	47%
Public Services	Public Admin, Education, Health	185,930	26%	1.0	6%	6,550	8%	1.0	6%
	Total	713,720	100%	-	-	80,650	100%	-	-

Source: BRES, ONS (2018)

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