



**European Union**  
European Social Fund



# Skills for the Future 2018-2030

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NOVEMBER 2018

Produced on behalf of the Leicester and Leicestershire  
Enterprise Partnership

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## **EXECUTIVE SUMMARY**

### **Introduction**

1. This is the report from the Skills for the Future 2018-2030 study undertaken on behalf of the Leicester and Leicestershire Enterprise Partnership (LLEP). The report provides detailed analysis of future employment and skills needs in the LLEP area with the dual aim of: a) supporting the local skills system in better meeting the needs of business; and b) informing careers education, information, advice and guidance across all educational settings within the LLEP area.
2. The report draws on three main inputs:
  - Bespoke employment forecasts by industry and occupation;
  - Primary research with 98 employers, eight recruitment agencies and 20 skills providers that have a base in the LLEP area;
  - Analysis of relevant sections of the 2017 UK Employer Skills Survey (UKESS) and the 2017 Leicester and Leicestershire Business Survey.

### **Employment forecasts in summary**

3. In 2017, there were an estimated 499,200 jobs in the LLEP area. By 2023, this is forecast to have risen to 518,670 – an increase or ‘expansion demand’ of 3.9% compared with a forecast national increase of 2.9% and a regional (East Midlands) forecast increase of 3.2%. Over the same period, the working age (age 16-64) population of Leicester and Leicestershire is forecast to increase by 1.9%, or 12,300 people, although this figure does not include any net inward migration projections, plus more people are working into later life.
4. In addition, developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth could see a further 6,700 new jobs created in the logistics sector over the period to 2023.
5. There will also be a requirement in all sectors to fill vacancies arising through ‘replacement demand’, i.e. people leaving the workforce due to retirement or mortality. It is estimated that replacement demand will equate to 146,150 vacancies in the LLEP area between 2017 and 2023.
6. The total requirement (expansion and replacement demand combined) for the LLEP area between 2017 and 2023 is therefore estimated at 165,620 jobs, or 172,320 if the additional 6,700 new jobs in logistics are also included.

### **Sectors<sup>1</sup> with the highest forecast expansion demand**

7. Between 2017 and 2023, the largest employment increases in the LLEP area are forecast in<sup>2</sup>:
- Accommodation and Food Services (+5,070 jobs; +15%);
  - Professional, Scientific and Technical Activities (+3,880; +9%);
  - Human Health and Social Work Activities (+3,630; +6%);
  - Wholesale Trade (excluding motor vehicle) (+1,800; +6%);
  - Manufacturing (+1,390; +2%).

### **Sectors<sup>3</sup> with negative expansion demand**

8. Reductions in employment in the LLEP area between 2017 and 2023 are forecast in:
- Real Estate Activities (-270 jobs; -6.0%);
  - Information and Communication (-440 jobs; -5.1%)<sup>4</sup>;
  - Water Supply, Sewerage, Waste Management and Remediation Activities (-100 jobs; -4.8%);
  - Financial and Insurance Activities (-90 jobs; -0.8%);
  - Public Administration and Defence (-90 jobs; -0.4%);
  - Education (-160 jobs, -0.4%).

### **Sectors<sup>5</sup> with the highest total jobs requirements**

9. Manufacturing, Human Health and Social Work and Professional, Scientific and Technical Activities are the sectors in which the total jobs requirements are expected to be highest between 2017 and 2023 (Table ES.1, with further detail provided in Chapter 2 of the main report).

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<sup>1</sup> One-digit Standard Industrial Classifications.

<sup>2</sup> Excludes the potential growth of c. 6,700 new jobs in logistics due to the degree of estimation involved in that figure.

<sup>3</sup> One-digit Standard Industrial Classifications.

<sup>4</sup> This forecast decline is heavily influenced by job number reductions in computer consultancy activity, other telecoms and publishing activities. Others areas, e.g. data processing and motion picture production, are all forecast to record job number increases.

<sup>5</sup> As above.

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**Table ES.1: Total jobs requirement by sector (top ten) in the LLEP area – 2017 to 2023**

Sector	Expansion Demand	Replacement Demand	Total Requirement
Manufacturing	1,390	19,330	20,720
Human Health and Social Work Activities	3,630	16,850	20,480
Professional, Scientific and Technical Activities	3,880	12,080	15,960
Accommodation and Food Service Activities	5,070	10,160	15,230
Retail Trade (except Motor Vehicle)	350	13,360	13,710
Education	(160)	13,280	13,120
Administrative and Support Service Activities	680	11,760	12,440
Wholesale Trade (except Motor Vehicle)	1,800	8,240	10,040
Transportation and Storage*	320	7,960	8,280
Construction	640	6,640	7,280

Source: Emsi

\*excludes the potential growth of c. 6,700 new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane and Glebe Farm due to the degree of estimation involved in that figure.

## Occupations

10. In the LLEP area, increases in employment are forecast in all the one-digit Standard Occupational Classification (SOC) groupings between 2017 and 2023. The largest increases (in absolute terms) are expected in Elementary Occupations, Professional Occupations and Associate Professional and Technical Occupations (Figure ES.1).

Figure ES.1: Forecast employment change in the LLEP area by one-digit SOC groupings



Source: Emsi

11. Professional Occupations are forecast to have the highest number of total vacancies in the LLEP area between 2017 and 2023, followed by Elementary Occupations and Administrative and Secretarial Occupations (Table ES.2).



**Table ES.2: Expansion and replacement demand by occupation**

Occupation	Expansion Demand to 2023	Replacement Demand to 2023	Total Requirement
Professional occupations	3,400	23,980	27,380
Elementary occupations	3,760	21,820	25,580
Administrative and secretarial occupations	2,160	18,980	21,140
Associate professional and technical occupations	2,240	17,060	19,300
Managers, directors and senior officials	1,670	14,570	16,240
Caring, leisure and other service occupations	1,500	13,040	14,540
Skilled trades occupations	1,830	12,500	14,330
Sales and customer service occupations	1,680	12,180	13,860
Process, plant and machine operatives	1,260	12,020	13,280
<b>Total</b>	<b>19,480</b>	<b>146,150</b>	<b>165,630</b>

Source: Emsi

## T Levels

12. Job numbers in the LLEP area in all 15 of the T Level routes are forecast to grow between 2017 and 2023. The combined rate of growth across the 15 routes is +3.9% which is the same as the all-sector forecast for the LLEP area as a whole.
13. The largest increase in absolute terms is forecast in Sales, Marketing and Procurement (+2,360 jobs), while the largest proportionate increase is forecast in Catering and Hospitality (+6.3%). The smallest increase in absolute terms is forecast in Hair and Beauty (+80 jobs), while the smallest proportionate increase is forecast in Protective Services (+2.1%).

## Employer feedback

### Work readiness

14. Employers in the study sample reported very few issues with the employability skills/attributes of recent applicants aged 25 and over. Views towards the work readiness skills of young people were less positive, with communication skills, problem-solving and resilience cited as the main issues. Overall, however, employers were slightly more positive about the work readiness of young people than in the original Skills for the Future study undertaken in 2016.

### Apprenticeships

15. Employers in the sample who recruit apprentices were evenly split on whether it has been easy or difficult to fill recent apprenticeship vacancies. Where difficulties had arisen, they often said this had been because applicants did not have the right skills or personal attributes for the job.
16. Changes in employer behaviour on apprenticeships in response to recent policy developments appear most common amongst larger employers. However, there was

no evidence to suggest that the channels through which employers (of any size) recruit apprentices have changed significantly over the past two years.

17. There was general consensus amongst the employers in the sample that apprenticeships are becoming better understood by prospective learners, parents and businesses. However, equally common was the view that there is still considerable work to be done in order for apprenticeships, and the potential they offer to young people, to be more accurately understood, especially amongst parents.

### **Training**

18. More than 80% of the employers in the sample said that, at least to some extent, they know where to find information about local training. More than 90% said that they know where to find information about online training. Views were more mixed – although still positive overall – on how easy the information about training is to understand and how well the employers understand the different qualification levels.

### **Future skills**

19. Customer care, communication, digital and management and supervisory skills were identified most regularly by employers when they were asked which skill-sets would become more important to them over the next three years. It was rare for any employer to say that any given skill-set would become less important to them over that period.

### **Insight from other surveys**

#### **Skills gaps**

20. Results from the UKESS suggest that the proportion of employers in the LLEP area with skills gaps is falling: in the 2017 survey, 13% of LLEP employers reported a skills gap compared with 16% two years earlier. The national figure of 13% was unchanged between the two surveys. Skills gaps in Construction, Information and Communication and Primary Sector and Utilities are more common in the LLEP area than they are nationally. However, skills gaps in the majority of other sectors are less prevalent locally than they are nationally.
21. Training being only partially completed and staff being new to their role were the main reasons given in the 2017 UKESS for why skills gaps exist, both in the LLEP area and nationally.

### **Training**

22. In the 12 months prior to the 2017 UKESS, 66% of Leicester and Leicestershire employers had provided training for their staff. This is the same as the national figure and higher than the East Midlands figure of 64%. It is also a 1% increase on the Leicester and Leicestershire figure of 65% reported in the 2015 UKESS. Amongst employers who had not provided any training, the overwhelming reason was that all staff are considered fully proficient or have no need for training.

23. The 2017 Leicester and Leicestershire Business Survey found that employers that had arranged training in the preceding 12 months had generally found it easy to do so. Fewer than one in ten employers said it had not been easy.

### **Vacancies**

24. UKES data suggests that vacancies are (or were, in 2017) slightly less prevalent in Leicester and Leicestershire than they are nationally. Seventeen percent of the employers from the LLEP area who took part in the 2017 UKES said they had at least one vacancy, compared with 20% of employers nationally. The Leicester and Leicestershire figure has reduced from 20% in the 2015 UKES survey whilst the national figure is unchanged. Both skills shortage vacancies and hard-to-fill vacancies were reported less frequency by LLEP area employers than employers nationally.
25. The 2017 Leicester and Leicestershire business survey suggests when employers in the LLEP area have had difficulty filling their vacancies, by far the most common reason has been a low number of applicants with the required skills.

# 1 INTRODUCTION

## Purpose of this report

- 1.1 This is the final report from the Skills for the Future 2018-2030 study undertaken on behalf of the Leicester and Leicestershire Enterprise Partnership (LLEP). Building on the first Skills for the Future study in 2016, the objectives of this work were to provide:
- Detailed analysis of future employment and skills needs in Leicester and Leicestershire;
  - Information and insight on key labour market issues that can be used to:
    - Support the local skills system in better meeting the needs of business;
    - Inform and support careers education, information, advice and guidance across all educational settings within the LLEP area.
- 1.2 The report is accompanied by a series of Excel-based outputs, ranging from ‘top ten’ lists (e.g. the fastest growing sectors and occupations in the LLEP area) to detailed employment projections at four-digit Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) level.
- 1.3 Thanks are owed to all employers, skills providers, recruitment agencies and other stakeholders that have contributed to this work. Members of the Skills for the Future 2018-2030 steering group are also thanked for their support and guidance.

## Methodology

- 1.4 Summarised in Table 1.1, the study has involved two main methodological components.

Table 1.1: Study method	
Strand	Summary
Economic modelling	Employment forecasts to 2023 and 2030 have been developed for the LLEP area, broken down by industry and occupation.
Primary research	<p>A total of 98 employers with a base in the LLEP area have contributed to the study via a combination of group consultation sessions, one-to-one telephone consultations and an online survey.</p> <p>Representatives from 20 skills providers – including colleges, training providers and universities – attended a Skills for the Future round-table consultation event.</p> <p>One-to-one telephone consultations were undertaken with eight recruitment agencies operating in the LLEP area.</p> <p>Appendix A explains the sampling approaches taken with employers, skills providers and recruitment agencies.</p>
Secondary analysis	Relevant sections of the 2017 UK Employer Skills Survey 2017 and the 2017 Leicester and Leicestershire Business Survey have been analysed and key

	findings presented in this report.
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## An overview of the economic modelling approach

1.5 Chapters Two to Five inclusive present results from a bespoke forecasting exercise undertaken for the study. This forecasting has covered the following (note that all references to ‘employment’ also include self-employment):

- **Industry analysis (one, two and four-digit SIC codes):**
  - Employment volumes and change 2010-2017;
  - Employment projections 2017-2023;
  - Employment projections 2017-2030<sup>6</sup>.
- **LLEP priority sector analysis<sup>7</sup> (constructed using four-digit SIC codes):**
  - Employment volumes and change 2010-2017;
  - Employment projections 2017-2023;
  - Employment projections 2017-2030.
- **Occupation analysis (one, two and four-digit SOC codes):**
  - Employment volume and change 2010-2017;
  - Employment projections 2017-2023;
  - Employment concentration.
- **T Level route analysis (constructed using four-digit SOC codes):**
  - Employment volume and change 2010-2017;
  - Employment projections 2017-2023;
  - Employment concentration.

1.6 The forecasts do not prescribe exactly ‘how many’ and of ‘what type’ will be needed in the future, although they do indicate the anticipated direction of travel and provide an estimate of the scale of change. As with all forecasts, the figures are susceptible to external factors such as changes in the economic climate and new policy initiatives that impact upon employment.

1.7 The forecasting results are presented in this report at LLEP area level. District level data is available in the accompanying spreadsheets.

## Policy off forecasting

1.8 The forecasts generated by the model are referred to as ‘policy off’ forecasts. This means that whilst they account for the ebbs and flows of economic cycles, they do not include the likely employment effects of major investment schemes that the LLEP is

<sup>6</sup> Projections beyond 2023 are less robust than the 2016-2030 figures.

<sup>7</sup> These are the LLEP’s priority sectors as defined in the current Strategic Economic Plan, plus Health and Social Care and Sport and Physical Activity. A list of four-digit SIC codes for each priority sector can be found at Appendix B.

confident will go ahead and which will have a demonstrable impact upon local employment.

1.9 The steering group assembled for Skills for the Future 2018-2030 identified four such investments, all of which are in the logistics sector:

- East Midlands Gateway;
- Enderby Logistics Point;
- Mere Lane at Bittesby;
- Glebe Farm at Lutterworth.

1.10 At the time of writing these schemes are at different stages of advancement. The East Midlands Gateway project, for example, is underway, whilst the Glebe Farm development is at an earlier planning stage. A broad estimate of the employment creation effects of each development has been provided for this study, together totalling approximately 6,700 jobs in logistics. However, the estimates do not include a breakdown of new jobs by sub-industry or occupation. Predicting when the jobs will come on stream also requires a significant degree of estimation at this stage.

1.11 For these reasons, the jobs associated with the four new developments have not been included in the main forecasting results. However, they are referenced and quantified in Chapter 3 (LLEP priority sectors).

## **Jobs**

1.12 In all cases, the employment volumes stated in this report relate to the number of jobs in a given sector or occupation, not to the number of full-time equivalents.

## **Negative numbers**

1.13 In the tables in this report, negative numbers are presented in parentheses.

## **Brexit**

1.14 At the time of writing, the effects that Brexit will have on levels and patterns of employment and economic development in the LLEP area are not known. No attempt has been made in this report to adjust the employment forecasts to take account of Brexit.

## **The LLEP area in summary**

1.15 Table 1.2 (overleaf) provides a summary of key population, employment and skills statistics for the LLEP area.

Table 1.2: The LLEP area in summary

<b>Population</b>  <small>Source: Mid-Year Population Estimates and Office for National Statistics</small>	<b>Total population:</b> 1.04m (2017) <b>District breakdown:</b> Blaby (99,000), Charnwood (180,400), Harborough (91,500), Hinckley and Bosworth (111,400), Leicester (353,500), Melton (50,900), North West Leicestershire (100,100), Oadby and Wigston (57,000) <b>Population projections:</b> between 2017 and 2030, the total population of the LLEP area is forecast to increase by 95,200 (+9.2%) to an estimated 1.13m.
<b>Working Age Population (age 16-64)</b>  <small>Source: Mid-Year Population Estimates and Office for National Statistics</small>	<b>Working age population:</b> 664,200 (2017) <b>District breakdown:</b> Blaby (60,400), Charnwood (117,500), Harborough (55,000), Hinckley and Bosworth (67,600), Leicester (236,200), Melton (30,700), North West Leicestershire (62,000), Oadby and Wigston (34,800) <b>Population projections:</b> between 2017 and 2023, the working age population of the LLEP area is forecast to increase by 12,300 (+1.9%) to an estimated 671,500.
<b>Skills Levels</b>  <small>Source: Annual Population Survey</small>	<p>In 2017, 33.2% of the working age population in the LLEP area were qualified to Level 4 or above, compared with 38.3% of the working age population nationally. The proportions of the LLEP working age population qualified to Level 2 (70.9%) and Level 3 (54.1%) were below the national figures of 57.1% and 74.6% respectively.</p>
<b>Business Base</b>  <small>Source: Inter Departmental Business Register</small>	<b>No. enterprises:</b> 42,400 (2017) <b>No. business units (includes all sites of multi-site businesses):</b> 48,300 (2017) <b>Proportion of enterprises that are SME:</b> 99.6% <b>District breakdown of enterprises:</b> Blaby (4,320), Charnwood (7,630), Harborough (5,225), Hinckley and Bosworth (4,595), Leicester (11,980), Melton (2,525), North West Leicestershire (4,200), Oadby and Wigston (1,965).
<b>Industry Sectors</b>  <small>Source: Business Register and Employment Survey</small>	<b>Prominent sectors:</b> Wholesale and Retail (16% of employment in 2016), Manufacturing (14%), Health and Social Care (11%), Education (9%), Professional Service Activities (9%), Administrative and Support Service Activities (8%).
<b>Occupations</b>  <small>Source: Annual Population Survey</small>	<b>Over-represented occupations<sup>8</sup>:</b> Elementary Occupations; Process, Plant and Machine Operatives; Sales and Customer Service Occupations, Administrative and Secretarial Occupations <b>Under-represented occupations<sup>9</sup>:</b> Professional Occupation; Caring, Leisure and Other Service Occupations; Managers, Directors and Senior Officials
<b>Productivity</b>  <small>Source: Office for National Statistics</small>	<b>Total Gross Value Added (GVA – wages and profits):</b> £23bn per annum (2016) <b>Proportion of national GVA:</b> 1.5% (2016) <b>Average GVA per head:</b> £22,750 compared with £24,460 nationally (2016).

<sup>8</sup> At least 0.5 percentage points difference between the proportion of employment in the LLEP area and the proportion of employment nationally.

<sup>9</sup> As above.

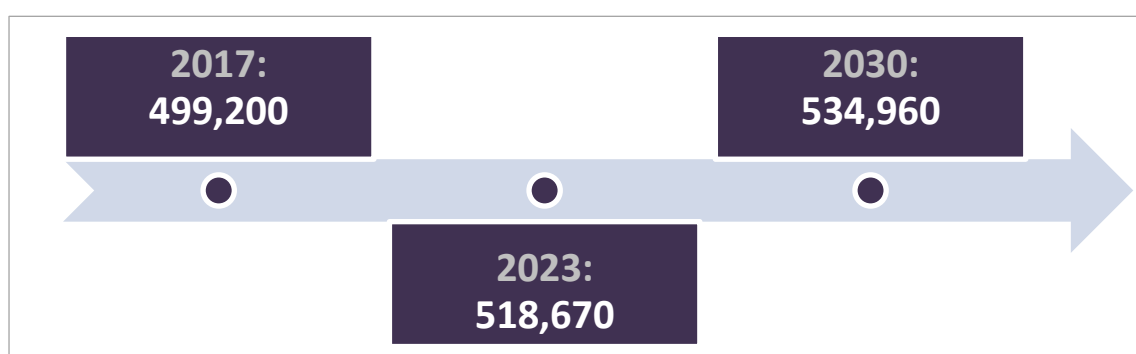
## 2 INDUSTRY PROJECTIONS

### One-digit SIC code projections

#### Expansion Demand (i.e. the creation of new jobs)

- 2.1 At the end of 2017 there were an estimated 499,200 jobs in the LLEP area. By 2023, this is forecast to have risen to 518,670 jobs – an increase of 3.9% or 19,470 jobs. This is a higher rate of growth than is forecast both regionally (+3.2%) and nationally (+2.9%).
- 2.2 A further increase of 3.1% is forecast in the LLEP area between 2023 and 2030, resulting in an estimated total jobs figure in 2030 of 534,960 (Figure 2.1).

**Figure 2.1: Jobs in the LLEP area**



Source: Emsi

- 2.3 **Increases** in employment between 2017 and 2023 are forecast to occur in 15 of the 21 one-digit SIC industries. However, 81% of the total increase is forecast to occur in five industries:
- Accommodation and Food Services (+5,070 jobs; +15%);
  - Professional, Scientific and Technical Activities (+3,880; +9%);
  - Human Health and Social Work Activities (+3,630; +6%);
  - Wholesale Trade (excluding motor vehicle) (+1,800; +6%);
  - Manufacturing (+1,390; +2%).
- 2.4 **Reductions** in employment are forecast in six of the 21 one-digit SIC code industries. In proportionate terms, these reductions range from 0.4% to 6.0% of the 2017 total jobs figure:
- Real Estate Activities (-270 jobs; -6.0%);
  - Information and Communication (-440 jobs; -5.1%)<sup>10</sup>;

<sup>10</sup> This forecast decline is heavily influenced by job number reductions in computer consultancy activity, other telecoms and publishing activities. Other areas, e.g. data processing and motion picture production, are all forecast to record job number increases.



- Water Supply, Sewerage, Waste Management and Remediation Activities (-100 jobs; -4.8%);
- Financial and Insurance Activities (-90 jobs; -0.8%);
- Public Administration and Defence (-90 jobs; -0.4%);
- Education (-160 jobs, -0.4%).

### **Replacement Demand<sup>11</sup>**

2.5 In addition to new jobs or ‘expansion demand’, there will also be a requirement in all sectors to fill vacancies arising through replacement demand. The definition of replacement demand used in this study is based on that used in *Working Futures*<sup>12</sup> and includes:

- People leaving the workforce due to retirement;
- People leaving the workforce due to mortality.

2.6 Due to sample size limitations within national datasets, the definition does not include occupational mobility, i.e. people changing occupations but remaining in the workforce.

2.7 Using the above definition, replacement demand in the LLEP area between 2017 and 2023 is estimated 146,150 vacancies (Table 2.1). It is forecast to be highest in:

- Manufacturing (19,330 vacancies);
- Human Health and Social Work (16,850 vacancies);
- Retail Trade, except Motor Vehicles (13,360 vacancies);
- Education (13,280 vacancies);
- Professional, Scientific and Technical Activities (12,080 vacancies).

2.8 The replacement demand forecasts exceed, by some margin, forecast growth in the working age population of the LLEP area over the same period. Note, however, that the working age population projections do not include inward migration, nor people that are returning to the labour market after a period of not working (e.g. mothers returning to work). The population projections also assume working age to stop at 65, which in reality is of course no longer the case for many people.

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<sup>11</sup> The economic model used to generate the forecasts on this study provides an estimate of replacement demand at the level of individual occupations. It is less straightforward within the model to do so at the level of individual sectors and, as such, a cross-sector annual average of 4% has been applied.

<sup>12</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/513801/Working\\_Futures\\_final\\_evidence\\_report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/513801/Working_Futures_final_evidence_report.pdf)

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**Table 2.1: Expansion and replacement demand in the LLEP area at one-digit SIC level**

One-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)	Expansion Demand (2017-2030)	
			2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)	2017-2030 change (no.)	2017-2030 change (%)
Manufacturing	66,040	67,430	1,390	2%	19,330	3,180	5%
Human Health and Social Work Activities	57,550	61,180	3,630	6%	16,850	6,250	11%
Retail Trade, Except of Motor Vehicles and Motorcycles	45,630	45,980	350	1%	13,360	840	2%
Education	45,370	45,210	(160)	(0.4%)	13,280	(140)	(0.3%)
Professional, Scientific and Technical Activities	41,260	45,140	3,880	9%	12,080	6,630	16%
Administrative and Support Service Activities	40,170	40,850	680	2%	11,760	1,410	4%
Accommodation and Food Service Activities	34,710	39,780	5,070	15%	10,160	8,540	25%
Wholesale Trade, Except of Motor Vehicles and Motorcycles	28,150	29,950	1,800	6%	8,240	3,140	11%
Transportation and Storage*	27,210	27,530	320	1%	7,960	780	3%
Construction	22,670	23,310	640	3%	6,640	1,250	5%
Public Administration and Defence; Compulsory Social Security	20,220	20,130	(90)	(0.4%)	5,920	(80)	(0.4%)
Arts, Entertainment and Recreation	11,920	12,440	520	4%	3,490	1,000	8%
Financial and Insurance Activities	10,460	10,380	(80)	(1%)	3,060	(30)	(0.3%)
Wholesale and Retail Trade and Repair of Motor Vehicles and Motorcycles	9,640	9,790	150	2%	2,820	330	3%

**Table 2.1: Expansion and replacement demand in the LLEP area at one-digit SIC level**

Other Service Activities	9,430	9,600	170	2%	2,760	380	4%
Information and Communication	8,640	8,200	(440)	(5%)	2,530	(590)	(7%)
Electricity, Gas, Steam and Air Conditioning Supply	7,570	8,910	1,340	18%	2,220	2,240	30%
Real Estate Activities	4,250	3,980	(270)	(6%)	1,240	(400)	(9%)
Agriculture, Forestry and Fishing	4,220	4,530	310	7%	1,240	530	13%
Water Supply; Sewerage, Waste Management and Remediation Activities	2,080	1,980	(100)	(5%)	610	(100)	(5%)
Mining and Quarrying	2,020	2,370	350	17%	590	600	29%
<b>Total</b>	<b>499,200</b>	<b>518,670</b>	<b>19,470</b>	<b>4%</b>	<b>146,150</b>	<b>35,760</b>	<b>7%</b>

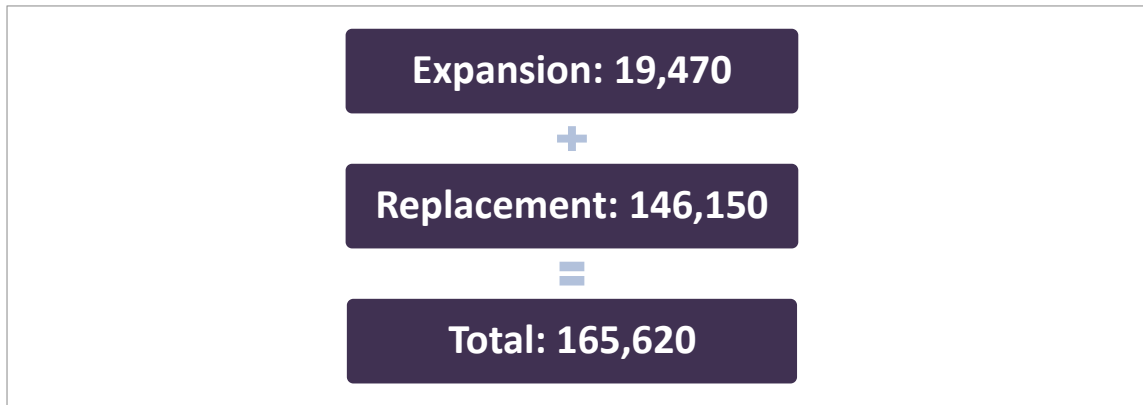
Source: Emsi. Column totals differ slightly from the figures shown in the 'Total' row due to rounding.

\*projections for Transportation and Storage do not include the new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3.

**Expansion and Replacement Demand in Summary**

- 2.9 The total jobs requirement (expansion and replacement demand combined) for the LLEP area between 2017 and 2023 is estimated at 165,620 jobs (Figure 2.2).

**Figure 2.2: Jobs to be filled between 2017 and 2023 in the LLEP area (all sectors)**



Source: Emsi

- 2.10 Working on a pro rata basis, this is an average of 27,600 jobs per year, the vast majority of which (88%; c. 20,878 jobs per year) is accounted for by replacement demand.
- 2.11 Table 2.2 summarises the expansion, replacement and total demand for all industries at one-digit SIC code level. Manufacturing and Human Health and Social Work have, by a margin of several thousand jobs, the highest number of forecast jobs to be filled.

**Table 2.2: Expansion and replacement demand in summary (one-digit SIC)**

One-digit SIC	2017-2023 Expansion Demand	2017-2023 Replacement Demand	2017-2023 Total Requirement
Manufacturing	1,390	19,330	20,720
Human Health and Social Work Activities	3,630	16,850	20,480
Professional, Scientific and Technical Activities	3,880	12,080	15,960
Accommodation and Food Service Activities	5,070	10,160	15,230
Retail Trade (except Motor Vehicle)	350	13,360	13,710
Education	(160)	13,280	13,120
Administrative and Support Service Activities	680	11,760	12,440
Wholesale Trade (except Motor Vehicle)	1,800	8,240	10,040
Transportation and Storage*	320	7,960	8,280
Construction	640	6,640	7,280
Public Administration and Defence; Compulsory Social Security	(90)	5,920	5,830
Arts, Entertainment and Recreation	520	3,490	4,010
Electricity, Gas, Steam and Air Conditioning Supply	1,340	2,220	3,560
Financial and Insurance Activities	(80)	3,060	2,980
Wholesale and Retail Trade and Repair of Motor Vehicles and Motorcycles	150	2,820	2,970
Other Service Activities	170	2,760	2,930
Information and Communication	(440)	2,530	2,090
Agriculture, Forestry and Fishing	310	1,240	1,550
Real Estate Activities	(270)	1,240	970
Mining and Quarrying	350	590	940
Water Supply; Sewerage, Waste Management and Remediation Activities	(100)	610	510
<b>Total</b>	<b>19,470</b>	<b>146,150</b>	<b>165,620</b>

Source: Emsi. Column totals differ slightly from the figures shown in the 'Total' row due to rounding.

\*projections for Transportation and Storage do not include the new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3 for further details.

## What is driving the forecast jobs growth?

- 2.12 In absolute terms, the largest employment increases in the LLEP area are forecast to occur in Accommodation and Food Services, Professional, Scientific and Technical Activities, Human Health and Social Work Activities, Wholesale Trade (excluding motor vehicles) and Manufacturing. For each of these, the text below explains the sub-industries (at two-digit and, where appropriate, four-digit SIC code level) that are forecast to experience the most significant jobs growth between 2017 and 2023.

**Accommodation and Food Services (+5,080 jobs):** four fifths of the jobs growth (4,030 jobs) is forecast to occur in the Food and Beverage Service Activities sub-industry. In fact, this sub-industry is forecast to have c. 1,400 more new jobs than any other in the LLEP area between 2017 and 2023. The forecasts suggest that it will account for 21% of the LLEP area's entire net jobs growth over that period.

**Professional, Scientific and Technical (+3,890 jobs):** more than three quarters of the growth in this industry is forecast to occur in the Activities of Head Offices and Management Consultancies (+1,570 jobs) and Legal and Accounting (+1,400 jobs). The remaining growth is forecast to occur largely in Architectural and Engineering Activities and Other Professional, Scientific and Technical Activities.

**Human Health and Social Work Activities (+3,630 jobs):** this industry has three two-digit sub-industries: Human Health Activities (+2,610 jobs), Residential Care Activities (-200 jobs) and Social Work Activities without Accommodation (+1,210 jobs). At four-digit SIC level, the jobs growth is dominated by Hospital Activities (+2,600 jobs).

**Wholesale Trade (excluding motor vehicle) (+1,800 jobs):** three four-digit sub-industries are forecast to account for more than half the jobs growth in this industry. They are: 'Wholesale of Other Machinery and Equipment' (+450 jobs), 'Non-specialised Wholesale Trade' (+300 jobs) and Wholesale of Hardware, Plumbing and Heating Equipment and Supplies (+250 jobs). The remaining jobs growth is spread across 34 other four-digit sub-industries.

**Manufacturing (+1,390 jobs):** the Manufacture of Wearing Apparel sub-industry is forecast to account for three-fifths of the growth (59%; +830 jobs) between 2017 and 2023. Much of the remaining employment change is accounted for by increases in Manufacture of Furniture and Manufacture of Rubber and Plastic Products (+570 jobs).

- 2.13 Table 2.3 shows the ten two-digit sub-industries (regardless of their one-digit industry) that are forecast to see the largest absolute jobs growth between 2017 and 2023. Table 2.4 shows the top ten two-digit sub-industries listed by forecast *proportionate* change. Key points from this data are:

- By volume (Table 2.3), jobs growth in the top ten sub-industries is forecast to account for 87% of total net<sup>13</sup> jobs growth across the LLEP area. Two of these ten sub-industries are knowledge intensive<sup>14</sup>:
  - Activities of Head Offices;
  - Legal and Accounting Activities.
- By proportionate change (Table 2.4), the equivalent figure is 46% (it is lower than the 87% stated above because Table 2.4 includes a number of much small sub-industries). Four of the sub-industries in Table 2.4 are knowledge intensive:
  - Creative, Arts and Entertainment Activities;
  - Motion Picture etc;
  - Legal and Accounting Activities;
  - Information Service Activities.
- Four sub-industries appear in both top ten lists: Accommodation; Food and Beverage Services; Legal and Accounting Activities; and Electricity, Gas, Steam and Air Conditioning Supply.

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<sup>13</sup> Job numbers in some industries and sub-industries are forecast to reduce between 2017 and 2023.

<sup>14</sup> Defined as two-digit level SIC codes: 58-63, 64-66, 69-75, 84, 85, 86 and 91.

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**Table 2.3: Top ten industries with the largest employment increases in absolute terms (two-digit SIC)**

Two-digit SIC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)	% of total forecast change in the LLEP area
Food and beverage service activities	28,690	32,720	4,030	14%	21%
Human health activities	34,680	37,290	2,610	8%	13%
Wholesale trade, except of motor vehicles and motorcycles	28,150	29,950	1,800	6%	9%
Activities of head offices; management consultancy activities	16,840	18,400	1,560	9%	8%
Legal and accounting activities	9,220	10,620	1,400	15%	7%
Electricity, gas, steam and air conditioning supply	7,570	8,910	1,340	18%	7%
Social work activities without accommodation	15,170	16,380	1,210	8%	6%
Employment activities	19,870	20,980	1,110	6%	6%
Accommodation	6,020	7,060	1,040	17%	5%
Manufacture of wearing apparel	7,090	7,920	830	12%	4%
<b>Total</b>	<b>173,290</b>	<b>190,240</b>	<b>16,950</b>	<b>10%</b>	<b>87%</b>

Source: Emsi



**Table 2.4: Top ten industries with the largest employment increases in proportionate terms (two-digit SIC)**

Two-digit SIC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)	% of total forecast change in the LLEP area
Creative, arts and entertainment activities	1,320	1,570	250	19%	1%
Electricity, gas, steam and air conditioning supply	7,570	8,910	1,340	18%	7%
Other mining and quarrying	2,020	2,370	350	17%	2%
Accommodation	6,020	7,060	1,040	17%	5%
Motion picture, video and television programme production, sound recording and music publishing activities	500	570	70	16%	0.4%
Legal and accounting activities	9,220	10,620	1,400	15%	7%
Information service activities	760	870	110	14%	1%
Food and beverage service activities	28,690	32,720	4,030	14%	21%
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	2,260	2,560	300	14%	2%
Manufacture of furniture	4,410	4,980	570	13%	3%
<b>Total</b>	<b>62,770</b>	<b>72,230</b>	<b>9,460</b>	<b>16%</b>	<b>49%</b>

Source: Emsi. Excludes industries with fewer than 250 jobs in 2017.

## What is driving the forecast jobs reduction?

2.14 Reductions in employment are forecast in six of the 21 one-digit industries between 2017 and 2023. The text below highlights the sub-industries within each of those one-digit industries that are forecast to see the most significant reductions.

**Information and Communication (-440 jobs)<sup>15</sup>:** Computer Programming and Consultancy Activities and Telecommunications are forecast to see net reductions of -290 and -270 jobs respectively. The four-digit sub-industries which make up a large proportion of this change are Computer Consultancy Activities (-300 jobs) and Other Telecommunication Activities (-280 jobs). Note, however, that other sub-industries with Information and Communication are forecast to grow, including Data Processing and Motion Picture Production.

**Real Estate Activities (-270 jobs):** Renting and Operating of Own or Leased Real Estate (-140 jobs) and Management of Real Estate on a Fee or Contract Basis (-70 jobs) are the four-digit sub-industries<sup>16</sup> which are forecast to have the largest net reduction in jobs by 2023.

**Education (-160 jobs):** the following four-digit sub-industries<sup>17</sup> are forecast to see the largest employment reductions between 2017 and 2023:

- Other education not elsewhere classified (n.e.c) (-320 jobs);
- Post-secondary non-tertiary education (-270 jobs);
- Primary education (-230 jobs).

2.15 Table 2.5 shows the ten two-digit sub-industries (regardless of their one-digit industry) that are forecast to see the largest absolute jobs reductions between 2017 and 2023. Table 2.6 then shows the top ten two-digit sub-industries listed by forecast *proportionate* change. Key points to note include:

- The largest absolute reduction (-660 jobs) is forecast in Services to Building and Landscape Activities.
- The largest proportionate reduction (-40%) is forecast in the Repair of Computers and Personal and Household Goods, although the small base number in 2017 should be noted.
- Two sub-industries – Manufacture of Electrical Equipment and Telecommunications – appear in both of the lists.

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<sup>15</sup> The overall reduction in the one-digit SIC 'Information and Communication' is smaller than the sum of the reductions in the sub-industries identified in the text because other sub-industries are forecast to see absolute increases in employment.

<sup>16</sup> The one-digit SIC code 'Real Estate Activities' only has one two-digit SIC and that has the same name ('Real Estate Activities'). For this reason, the forecast employment changes in this chapter have been analysed using four-digit sub-industries.

<sup>17</sup> As per footnote 11.

- Seven of the ten sub-industries in Table 2.5 are expected to experience reductions in job numbers at a national level between 2017 and 2023 (the exceptions being Services to Buildings and Landscape Activities, Computer Programming and Real Estate Activities, all of which are forecast to increase nationally). However, the proportionate reductions forecast in the LLEP area are consistently larger than those forecast nationally.

**Table 2.5: Top ten industries with the largest absolute reductions in employment (two-digit SIC)**

Two-digit SIC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)
Services to buildings and landscape activities	4,980	4,320	(660)	(13%)
Manufacture of fabricated metal products, except machinery and equipment	6,090	5,540	(550)	(9%)
Manufacture of machinery and equipment n.e.c.	4,780	4,460	(320)	(7%)
Manufacture of electrical equipment	860	560	(300)	(35%)
Financial service activities, except insurance and pension funding	5,590	5,290	(300)	(5%)
Computer programming, consultancy and related activities	5,750	5,460	(290)	(5%)
Rental and leasing activities	2,650	2,370	(280)	(11%)
Telecommunications	1,150	890	(260)	(23%)
Real estate activities	4,250	3,980	(270)	(6%)
Activities of membership organisations	2,850	2,630	(220)	(8%)

Source: Emsi

**Table 2.6: Top ten industries with the largest proportionate reductions in employment (two-digit SIC)**

Two-digit SIC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)
Manufacture of electrical equipment	860	560	(300)	(35%)
Air transport	820	610	(210)	(26%)
Telecommunications	1,150	890	(260)	(23%)
Veterinary activities	380	300	(80)	(21%)
Publishing activities	430	340	(90)	(21%)
Other manufacturing	600	480	(120)	(20%)
Manufacture of motor vehicles, trailers and semi-trailers	680	560	(120)	(18%)
Services to buildings and landscape activities	4,980	4,320	(660)	(13%)
Manufacture of chemicals and chemical products	750	650	(100)	(13%)
Rental and leasing activities	2,650	2,370	(280)	(11%)

Source: Emsi. Excludes industries with fewer than 250 jobs in 2017.

## Two-digit SIC code projections

2.16 Forecast job changes between 2017 and 2023 for all two-digit sub-industries are shown in Table 2.7<sup>18</sup>. Forty-one of the 96 sub-industries are expected to experience positive job growth over that period, while 36 sub-industries (including 11 in Manufacturing) are forecast to experience a reduction.

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<sup>18</sup> Blank cells denote zero employment.

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Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level

				Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
Agriculture, Forestry and Fishing	Crop and animal production, hunting and related service activities	4,100	4,410	310	8%	1,200
	Forestry and logging	100	100	-	(4%)	30
	Fishing and aquaculture	20	20	-	(5%)	10
Mining and Quarrying	Mining of coal and lignite	-	-	-	-	-
	Extraction of crude petroleum and natural gas	-	-	-	-	-
	Mining of metal ores	-	-	-	-	-
	Other mining and quarrying	2,020	2,370	350	17%	590
	Mining support service activities	-	-	-	-	-
Manufacturing	Manufacture of food products	12,280	12,720	440	4%	3,600
	Manufacture of beverages	680	680	-	0.7%	200
	Manufacture of tobacco products	-	-	-	-	-
	Manufacture of textiles	2,920	3,110	190	6%	850
	Manufacture of wearing apparel	7,090	7,920	830	12%	2,080
	Manufacture of leather and related products	220	210	(10)	(5%)	60
	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	2,260	2,560	300	14%	660
	Manufacture of paper and paper products	2,630	2,720	90	3%	770
	Printing and reproduction of recorded media	3,040	3,050	10	0.4%	890
	Manufacture of coke and refined petroleum products	-	-	-	-	-
	Manufacture of chemicals and chemical	750	650	(100)	(13%)	220

**Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level**

One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
				2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
	products					
	Manufacture of basic pharmaceutical products and pharmaceutical preparations	790	830	40	5%	230
	Manufacture of rubber and plastic products	4,830	5,360	530	11%	1,410
	Manufacture of other non-metallic mineral products	2,290	2,220	(70)	(3%)	670
	Manufacture of basic metals	1,140	1,110	(30)	(3%)	330
	Manufacture of fabricated metal products, except machinery and equipment	6,090	5,540	(550)	(9%)	1,780
	Manufacture of computer, electronic and optical products	2,990	2,840	(150)	(5%)	870
	Manufacture of electrical equipment	860	560	(300)	(5%)	250
	Manufacture of machinery and equipment n.e.c.	4,780	4,460	(320)	(7%)	1,400
	Manufacture of motor vehicles, trailers and semi-trailers	680	560	(120)	(18%)	200
	Manufacture of other transport equipment	2,560	2,820	260	10%	750
	Manufacture of furniture	4,410	4,980	570	13%	1,290
	Other manufacturing	600	480	(120)	(19%)	170
	Repair and installation of machinery and equipment	2,140	2,070	(70)	(3%)	630
Electricity, Gas, Steam and AC Supply	Electricity, gas, steam and air conditioning supply	7,570	8,910	1,340	18%	2,220
Water Supply,	Water collection, treatment and supply	160	130	(30)	(19%)	50



**Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level**

One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
				2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
Sewerage, Waste Management and Remediation	Sewerage	140	90	(50)	(34%)	40
	Waste collection, treatment and disposal activities; materials recovery	1,750	1,730	(20)	(1%)	510
	Remediation activities and other waste management services.	30	30	-	0%	10
Construction	Construction of buildings	5,270	5,140	(130)	(2%)	1,540
	Civil engineering	2,440	2,650	210	9%	720
	Specialised construction activities	14,960	15,510	550	4%	4,380
Wholesale & Retail, including repair of motor vehicles	Wholesale and retail trade and repair of motor vehicles and motorcycles	9,640	9,790	150	2%	2,820
	Wholesale trade, except of motor vehicles and motorcycles	28,150	29,950	1,800	6%	8,240
	Retail trade, except of motor vehicles and motorcycles	45,630	45,980	350	1%	13,360
Transportation and Storage*	Land transport and transport via pipelines	8,430	8,730	300	3%	2,470
	Water transport	-	-	-	-	-
	Air transport	820	610	(210)	(26%)	240
	Warehousing and support activities for transportation	12,430	12,780	350	3%	3,640
	Postal and courier activities	5,520	5,410	(110)	(2%)	1,620
Accommodation and Food service activities	Accommodation	6,020	7,060	1,040	17%	1,760
	Food and beverage service activities	28,690	32,720	4,030	14%	8,400
Information and	Publishing activities	430	340	(90)	(22%)	130

Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level

One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
				2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
Communication	Motion picture, video and television programme production, sound recording and music publishing activities	500	570	70	16%	140
	Programming and broadcasting activities	50	70	20	43%	10
	Telecommunications	1,150	890	(260)	(23%)	340
	Computer programming, consultancy and related activities	5,750	5,460	(290)	(5%)	1,680
	Information service activities	760	870	110	14%	220
Financial and Insurance services	Financial service activities, except insurance and pension funding	5,590	5,290	(300)	(5%)	1,640
	Insurance, reinsurance and pension funding, except compulsory social security	240	180	(60)	(25%)	70
	Activities auxiliary to financial services and insurance activities	4,640	4,910	270	6%	1,360
Real Estate activities	Real estate activities	4,250	3,980	(270)	(6%)	1,240
Professional, Scientific and Technical activities	Legal and accounting activities	9,220	10,620	1,400	15%	2,700
	Activities of head offices; management consultancy activities	16,840	18,400	1,560	9%	4,930
	Architectural and engineering activities; technical testing and analysis	6,870	7,540	670	10%	2,010
	Scientific research and development	2,160	2,060	(100)	(5%)	630
	Advertising and market research	1,510	1,510	-	(0.1%)	440
	Other professional, scientific and technical activities	4,290	4,730	440	10%	1,250

Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level

One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
				2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
	Veterinary activities	380	300	(80)	(23%)	110
Administrative and Support service activities	Rental and leasing activities	2,650	2,370	(280)	(11%)	780
	Employment activities	19,870	20,980	1,110	6%	5,820
	Travel agency, tour operator and other reservation service and related activities	1,220	1,110	(110)	(8%)	360
	Security and investigation activities	3,820	4,270	450	12%	1,120
	Services to buildings and landscape activities	4,980	4,320	(660)	(13%)	1,460
	Office administrative, office support and other business support activities	7,630	7,800	170	2%	2,230
Public Administration and Defence; compulsory social security	Public administration and defence; compulsory social security	20,220	20,130	(90)	(0.4%)	5,920
Education	Education	45,370	45,210	(160)	(0.4%)	13,280
Human Health and Social work activities	Human health activities	34,680	37,290	2,610	8%	10,150
	Residential care activities	7,700	7,500	(200)	(3%)	2,250
	Social work activities without accommodation	15,170	16,380	1,210	8%	4,440
Arts, Entertainment and Recreation	Creative, arts and entertainment activities	1,320	1,570	250	19%	390
	Libraries, archives, museums and other cultural activities	1,370	1,440	70	5%	400
	Gambling and betting activities	1,430	1,550	120	8%	420
	Sports activities and amusement and recreation activities	7,800	7,880	80	1%	2,280
Other Service activities	Activities of membership organisations	2,850	2,630	(220)	(8%)	840

**Table 2.7: Expansion and replacement demand in the LLEP area at two-digit SIC level**

One-digit SIC	Two-digit SIC	2017 jobs	2023 forecast	Expansion Demand (2017-2023)		Replacement Demand (2017-2023)
				2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)
	Repair of computers and personal and household goods	120	70	(50)	(40%)	30
	Other personal service activities	6,460	6,900	440	7%	1,890

Source: Emsi

\*projections for Transportation and Storage do not include the new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3.

### 3 PROJECTIONS FOR THE LLEP PRIORITY SECTORS

#### Introduction

- 3.1 In 2017, the LLEP's ten priority sectors<sup>19</sup> accounted for 249,830 jobs (50% of all jobs in the LLEP area in that year). The largest of these is Health and Social Care (Table 3.1). Appendix B provides a list of the four-digit SIC codes that define each priority sector.

**Table 3.1: Employment in the LLEP priority sectors in 2017**

Priority Sector	Jobs	% LLEP Total Jobs
Health and Social Care	57,550	11.5%
Logistics and Distribution	51,840	10.4%
Professional and Financial Services	42,710	8.6%
Tourism and Hospitality	40,860	8.2%
Advanced Manufacturing and Engineering	22,420	4.5%
Food and Drink Manufacturing	12,960	2.6%
Creative Industries	11,860	2.4%
Textile Manufacturing	10,240	2.1%
Sport and Physical Activity	9,500	1.9%
Energy	3,080	0.6%
<b>Total</b>	<b>249,830</b>	<b>50%</b>
The total figure of 249,830 jobs is less than the sum of the sector specific figures. This is because there are 19 four-digit SIC sub-industries that appear in more than of the LLEP priority sectors. These are listed at Appendix B.		

Source: Emsi

#### Employment Projections for the Priority Sectors

- 3.2 The total jobs requirement in the LLEP's priority sectors is expected to exceed 92,000 between 2017 and 2023 (Table 3.2). Equating to 56% of the total forecast growth in the LLEP area over that period, this is comprised of:
- A net increase of 15,400 new jobs (expansion demand);
  - 77,060 jobs to be filled through replacement demand.
- 3.3 Expansion demand amongst the LLEP priority sectors is expected to be driven largely by Tourism and Hospitality (+5,080 jobs), Health and Social Care (+3,620 jobs) and Logistics and Distribution (+2,470 jobs)<sup>20</sup>. Together these account for almost three

<sup>19</sup> Growth plans for these sectors can be found at: <https://www.llep.org.uk/strategies-and-plans/sector-growth-plans/>

<sup>20</sup> This figure excludes the new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm and Lutterworth.

quarters (74%) of the total expansion demand within the priority sectors between 2017 and 2023.

Table 3.2: Jobs requirement in the LLEP priority sectors between 2017 and 2023			
Priority Sector	Expansion Demand to 2023	Replacement Demand to 2023	Total Demand to 2023
Health and Social Care	+3,620	+16,870	+20,490
Logistics and Distribution*	+2,470	+15,190	+17,660
Tourism and Hospitality	+5,080	+11,960	+17,040
Professional and Financial Services	+2,330	+12,490	+14,820
Advanced Manufacturing and Engineering	(250)	+6,540	+6,290
Food and Drink Manufacturing	+440	+3,790	+4,230
Textile Manufacturing	+1,010	+3,010	+4,020
Creative Industries	+120	+3,440	3,560
Sport and Physical Activity	+290	+2,790	3,080
Energy	+10	+900	+910
<b>Total</b>	<b>+15,400</b>	<b>+77,060</b>	<b>92,460</b>
The figures in the 'Total' row above are different to the sum of the sector specific figures because of the 19 four-digit SIC sub-industries that appear in more than one of the sectors.			

Source: Emsi

\*Does not include the new jobs associated with developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' below for further details.

## Health and Social Care

- 3.4 The definition of the Health and Social Care sector used for this study comprises 12 four-digit SIC codes. The largest of these in 2017, by some margin, was Hospital Activities (25,270 jobs). This sub-industry had more than three times the number of jobs of any other and accounted for 44% of all jobs in the sector Table 3.3).
- 3.5 Collectively, the 12 industries are forecast to show a net increase of 3,620 jobs (+6%) between 2017 and 2023. The largest absolute growth is forecast in Hospital Activities (+2,590 jobs) while the largest relative growth is forecast in Social Work Activities Without accommodation for the Elderly and Disabled (+16%; +1,090 jobs).
- 3.6 In 2017, there were an estimated 2,840 workplace establishments operating primarily in Health and Social Care in the LLEP area.

**Table 3.3: Employment projections in Health and Social Care – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
8610	Hospital activities	25,270	27,860	2,590	10%
8810	Social work activities without accommodation for the elderly and disabled	7,030	8,120	1,090	16%
8899	Other social work activities without accommodation n.e.c.	5,110	4,790	(320)	(6%)
8621	General medical practice activities	3,810	3,980	170	4%
8690	Other human health activities	3,500	3,180	(320)	(9%)
8730	Residential care activities for the elderly and disabled	3,230	3,100	(130)	(4%)
8891	Child day-care activities	3,040	3,470	430	14%
8790	Other residential care activities	2,930	2,730	(200)	(7%)
8623	Dental practice activities	1,770	1,890	120	7%
8710	Residential nursing care activities	1,320	1,520	200	15%
8622	Specialist medical practice activities	330	380	50	15%
8720	Residential care activities for learning disabilities, mental health and substance abuse	220	160	(60)	(27%)

Source: Emsi

3.7 Table 3.4 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Health and Social Care based on job numbers in 2017. Key points include:

- The three largest occupations in the sector (Care Workers and Home Carers; Nurses; and Nursing Auxiliaries and Assistants) are forecast to show the largest absolute growth. In fact, when combined with Medical Practitioners, they are forecast to account for half of the total growth in the sector between 2017 and 2023.
- The largest growth in proportionate terms is forecast in Nursery Nurses and Assistants (+13%) and Biological Scientists and Biochemists (+11%).
- Job number reductions are only forecast in one of the 25 largest occupations in the sector between 2017 and 2023 (Social Workers).



**Table 3.4: Employment projections in Health and Social Care – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
6145	Care workers and home carers	9,110	9,660	550	6%
2231	Nurses	8,430	9,050	620	7%
6141	Nursing auxiliaries and assistants	4,920	5,320	400	8%
2211	Medical practitioners	3,470	3,780	310	9%
9233	Cleaners and domestics	1,760	1,890	130	7%
4159	Other administrative occupations n.e.c.	1,370	1,470	100	7%
4216	Receptionists	1,370	1,380	10	1%
6121	Nursery nurses and assistants	1,360	1,530	170	13%
4211	Medical secretaries	1,150	1,220	70	6%
6143	Dental nurses	1,010	1,060	50	5%
3239	Welfare and housing associate professionals n.e.c.	1,000	1,020	20	2%
2442	Social workers	780	750	(30)	(4%)
6146	Senior care workers	740	780	40	5%
2232	Midwives	740	790	50	7%
4131	Records clerks and assistants	700	760	60	9%
3231	Youth and community workers	550	580	30	5%
1242	Residential, day and domiciliary care managers and proprietors	550	560	10	2%
3561	Public services associate professionals	530	570	40	8%
1181	Health services and public health managers and directors	520	560	40	8%
2219	Health professionals n.e.c.	490	520	30	6%
2221	Physiotherapists	480	510	30	6%
2112	Biological scientists and biochemists	450	500	50	11%
2222	Occupational therapists	450	470	20	4%
2215	Dental practitioners	410	420	10	2%
4113	Local government administrative occupations	410	410	0	0%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Logistics and Distribution**

- 3.8 The Logistics and Distribution sector comprises 60 four-digit SIC codes, listed in full at Appendix B. Table 3.5 shows the largest 25 of these based on job numbers in 2017. All but four of these 25 sub-industries are forecast to record an increase in job numbers to 2023. In proportionate the increases range from 1% to 18%.
- 3.9 Collectively, the 60 industries are forecast to show a net increase of 2,470 jobs (+5%) between 2017 and 2023 (a full breakdown of employment in the sector can be found in the forecasting results which have been submitted to the LLEP alongside this report).
- 3.10 In 2017, there were an estimated 4,630 workplace establishments operating primarily in the Logistics and Distribution sector in the LLEP area.

**Table 3.5: Employment projections in Logistics and Distribution – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
5210	Warehousing and storage	10,110	10,830	720	7%
4941	Freight transport by road	6,100	6,390	290	5%
5320	Other postal and courier activities	3,800	3,800	0	0%
4669	Wholesale of other machinery and equipment	3,210	3,660	450	14%
4690	Non-specialised wholesale trade	2,650	2,950	300	11%
4673	Wholesale of wood, construction materials and sanitary equipment	2,100	2,020	(80)	(4%)
4639	Non-specialised wholesale of food, beverages and tobacco	1,910	2,030	120	6%
4674	Wholesale of hardware, plumbing and heating equipment and supplies	1,870	2,120	250	13%
5310	Postal activities under universal service obligation	1,730	1,610	(120)	(7%)
4646	Wholesale of pharmaceutical goods	1,590	1,630	40	3%
4642	Wholesale of clothing and footwear	1,490	1,330	(160)	(11%)
4676	Wholesale of other intermediate products	1,340	1,350	10	1%
5229	Other transportation support activities	1,230	940	(290)	(24%)
4649	Wholesale of other household goods	1,170	1,190	20	2%
4647	Wholesale of furniture, carpets and lighting equipment	950	1,040	90	9%
4641	Wholesale of textiles	700	750	50	7%
4671	Wholesale of solid, liquid and gaseous fuels and related products	650	710	60	9%
4675	Wholesale of chemical products	650	650	0	0%
4616	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods	560	660	100	18%
4618	Agents specialised in the sale of other particular products	490	570	80	16%
4631	Wholesale of fruit and vegetables	470	500	30	6%
4677	Wholesale of waste and scrap	450	470	20	4%
4652	Wholesale of electronic and telecommunications equipment and parts	430	430	0	0%
4614	Agents involved in the sale of machinery, industrial equipment, ships and aircraft	420	460	40	10%
5224	Cargo handling	360	380	20	6%

Source: Emsi

3.11 Table 3.6 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Logistics and Distribution based on job numbers in 2017. Key points include:

- The largest increase in absolute terms is expected to occur in Elementary Storage Applications (+460 jobs), which, by employment volume, is already by some margin the largest occupation in the sector.
- Large Goods Vehicle Drivers (+140 jobs) and Forklift Truck Drivers (+140 jobs) are forecast to experience the next largest increases.
- The largest proportionate increase is expected in Sales Related Occupations n.e.c. (+17%), albeit from a relatively small base compared with the larger occupations in the sector.
- Only two of the 25 largest occupations by employment volume are expected to experience a reduction in job numbers. These are Postal Workers (and related occupations) and Transport and Distribution Clerks and Assistants. In neither case does the reduction exceed 4% of the 2017 workforce.

**Table 3.6: Employment projections in Logistics and Distribution – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
9260	Elementary storage occupations	9,220	9,680	460	5%
8211	Large goods vehicle drivers	5,090	5,230	140	3%
8222	Fork-lift truck drivers	2,150	2,290	140	7%
8212	Van drivers	2,070	2,130	60	3%
9134	Packers, bottlers, canners and fillers	2,030	2,120	90	4%
3545	Sales accounts and business development managers	1,900	2,010	110	6%
1190	Managers and directors in retail and wholesale	1,720	1,830	110	6%
4159	Other administrative occupations n.e.c.	1,710	1,800	90	5%
9211	Postal workers, mail sorters, messengers and couriers	1,580	1,520	(60)	(4%)
1162	Managers and directors in storage and warehousing	1,270	1,340	70	6%
7111	Sales and retail assistants	1,070	1,130	60	6%
3542	Business sales executives	1,050	1,120	70	7%
4122	Book-keepers, payroll managers and wages clerks	1,030	1,070	40	4%
4133	Stock control clerks and assistants	870	920	50	6%
1161	Managers and directors in transport and distribution	870	890	20	2%
4134	Transport and distribution clerks and assistants	780	760	(20)	(3%)
1132	Marketing and sales directors	650	690	40	6%
1121	Production managers and directors in manufacturing	610	660	50	8%
8111	Food, drink and tobacco process operatives	510	560	50	10%
4161	Office managers	490	510	20	4%
7219	Customer service occupations n.e.c.	430	450	20	5%
1131	Financial managers and directors	420	430	10	2%
4151	Sales administrators	390	410	20	5%
3541	Buyers and procurement officers	360	390	30	8%
7129	Sales related occupations n.e.c.	350	410	60	17%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

### **One-issue forecasts in Logistics and Distribution**

- 3.12 Data gathered by the steering group for Skills for the Future 2018-2030 suggests that an estimated 6,700 new jobs in logistics, in addition to the net increase of 2,470 referenced earlier in this section, could be created via the developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth.
- 3.13 The data does not currently enable an accurate profiling of the 6,700 additional jobs across sub-industries or occupations. The specific timings of when the jobs will come on stream are also still to be defined. However, based on the information available at the time of writing, it seems reasonable to assume that a large majority of the jobs, if not all, will have been created by the end of 2023. If that is the case then approximately 9,170 new logistics jobs will be created in the LLEP area between 2017 and 2023.

### **Professional and Financial Services**

- 3.14 The Professional and Financial Services sector comprises 21 four-digit SIC codes. Table 3.7 lists all of these and shows the forecast employment change to 2023. Collectively, the 21 sub-industries are forecast to show a net increase of 2,330 jobs (+5.5%), although this growth is accounted for largely by four sub-industries:
- Accounting, Bookkeeping and Auditing Activities; Tax Consultancy (+790 jobs);
  - Legal Activities (+610 jobs);
  - Engineering Activities and Related Technical Consultancy (+600 jobs);
  - Other Professional, Scientific and Technical Activities n.e.c. (+570 jobs).
- 3.15 In 2017, there were an estimated 10,810 workplace establishments operating primarily in the Professional and Financial Services sector in the LLEP area.

**Table 3.7: Employment projections in Professional and Financial Services – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
6400	Financial service activities, except insurance and pension funding	5,580	5,290	(290)	(5%)
6920	Accounting, bookkeeping and auditing activities; tax consultancy	5,500	6,290	790	14%
7112	Engineering activities and related technical consultancy	4,720	5,320	600	13%
6600	Activities auxiliary to financial services and insurance activities	4,640	4,910	270	6%
7022	Business and other management consultancy activities	4,540	4,740	200	4%
6910	Legal activities	3,720	4,330	610	16%
6202	Computer consultancy activities	3,320	3,020	(300)	(9%)
7490	Other professional, scientific and technical activities n.e.c.	2,830	3,400	570	20%
6201	Computer programming activities	1,530	1,650	120	8%
7410	Specialised design activities	1,200	1,110	(90)	(8%)
7111	Architectural activities	1,190	1,350	160	13%
7120	Technical testing and analysis	960	860	(100)	(10%)
7311	Advertising agencies	920	960	40	4%
6209	Other information technology and computer service activities	840	720	(120)	(14%)
7320	Market research and public opinion polling	490	460	(30)	(6%)
6500	Insurance, reinsurance and pension funding, except compulsory social security	240	180	(60)	(25%)
7420	Photographic activities	220	180	(40)	(18%)
7312	Media representation	100	90	(10)	(10%)
7021	Public relations and communication activities	80	70	(10)	(13%)
6203	Computer facilities management activities	50	70	20	40%
7430	Translation and interpretation activities	40	40	0	0%

Source: Emsi

3.16 Table 3.8 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Professional and Financial Services based on the number of jobs in 2017. Key points include:

- Employment increases are expected across the vast majority of the largest occupations in the sector. Only in three occupations (Bank and Post Office Clerks; IT and Telecoms Professionals; and IT User Support Technicians) are reductions forecast to 2023 and, in each of those, the reductions are very small in both absolute and proportionate terms.
- In proportionate terms, Solicitors (+14%), Legal Associate Professionals (+14%) and Legal Secretaries (+13%) are expected to show the largest increases.
- It is a different picture in terms of absolute growth, with Bookkeepers, Payroll Managers and Wages Clerks (+270 jobs) and Chartered and Certified Accountants (+170) forecast to show the largest increases.



**Table 3.8: Employment projections in Professional and Financial Services – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
4122	Bookkeepers, payroll managers and wages clerks	2,640	2,910	270	10%
2136	Programmers and software development professionals	1,630	1,650	20	1%
2421	Chartered and certified accountants	1,550	1,720	170	11%
3534	Finance and investment analysts and advisers	1,450	1,520	70	5%
4123	Bank and post office clerks	1,420	1,370	(50)	(4%)
4159	Other administrative occupations n.e.c.	1,380	1,480	100	7%
3545	Sales accounts and business development managers	1,210	1,260	50	4%
2423	Management consultants and business analysts	1,190	1,250	60	5%
2413	Solicitors	1,010	1,150	140	14%
2139	Information technology and telecommunications professionals n.e.c.	960	930	(30)	(3%)
3538	Financial accounts managers	890	940	50	6%
1131	Financial managers and directors	870	900	30	3%
2133	IT specialist managers	830	840	10	1%
1150	Financial institution managers and directors	800	800	0	0%
2424	Business and financial project management professionals	790	820	30	4%
1132	Marketing and sales directors	740	770	30	4%
4215	Personal assistants and other secretaries	730	800	70	10%
4129	Financial administrative occupations n.e.c.	710	760	50	7%
4212	Legal secretaries	620	700	80	13%
3520	Legal associate professionals	590	670	80	14%
3543	Marketing associate professionals	560	570	10	2%
1136	Information technology and telecommunications directors	540	540	0	0%
2135	IT business analysts, architects and systems designers	510	520	10	2%
3421	Graphic designers	490	490	0	0%
3132	IT user support technicians	460	450	(10)	(2%)

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Tourism and Hospitality**

3.17 The Tourism and Hospitality sector comprises 17 four-digit SIC codes. Table 3.9 lists all of these and shows the forecast employment change to 2023. Collectively, the 17 sub-industries are forecast to grow in employment by 12%; an increase of 5,030 jobs, although this growth is concentrated within three sub-industries:

- Restaurants and Mobile Food Service Activities (+2,640 jobs);
- Beverage Serving Activities (+1,170 jobs);
- Hotels and Similar Accommodation (+940 jobs).

3.18 In 2017, there were an estimated 2,960 workplace establishments operating primarily in Tourism and Hospitality in the LLEP area.

**Table 3.9: Employment projections in Tourism and Hospitality – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
5610	Restaurants and mobile food service activities	15,430	18,070	2,640	17%
5630	Beverage serving activities	9,610	10,780	1,170	12%
5510	Hotels and similar accommodation	5,520	6,460	940	17%
9311	Operation of sports facilities	2,970	2,920	(50)	(2%)
5629	Other food service activities	2,440	2,910	470	19%
9200	Gambling and betting activities	1,430	1,550	120	8%
5621	Event catering activities	1,200	970	(230)	(19%)
9329	Other amusement and recreation activities	680	600	(80)	(12%)
9104	Botanical and zoological gardens and nature reserve activities	480	520	40	8%
5590	Other accommodation	280	330	50	18%
9102	Museum activities	210	170	(40)	(19%)
5520	Holiday and other short-stay accommodation	200	250	50	25%
9004	Operation of arts facilities	180	220	40	22%
9321	Activities of amusement parks and theme parks	120	80	(40)	(33%)
9103	Operation of historical sites and buildings and similar visitor attractions	40	50	10	25%
5530	Camping grounds, recreational vehicle parks and trailer parks	30	30	0	0%
7990	Other reservation service and related activities	30	20	(10)	(33%)

Source: Emsi

3.19 Table 3.10 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Tourism and Hospitality based on the job numbers in 2017. Key points include:

- All but two of the 25 largest occupations are forecast to increase in employment between 2017 and 2023. The other two (Sports and Leisure Assistants and Sports Coaches, Instructors and Officials) are forecast to show no change over that period.
- Occupations most commonly associated with restaurants, cafes and bars are forecast to be the drivers of growth in the sector. These include Kitchen and Catering Assistants, Waiters and Waitresses, Bar Staff and Chefs.

**Table 3.10: Employment projections in Tourism and Hospitality – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
9272	Kitchen and catering assistants	6,490	7,310	820	11%
9273	Waiters and waitresses	5,140	5,710	570	10%
9274	Bar staff	4,960	5,390	430	8%
5434	Chefs	3,320	3,710	390	11%
9233	Cleaners and domestics	2,090	2,510	420	17%
5435	Cooks	1,320	1,530	210	14%
1223	Restaurant and catering establishment managers and proprietors	1,260	1,400	140	10%
7111	Sales and retail assistants	1,200	1,480	280	19%
4216	Receptionists	870	980	110	11%
5436	Catering and bar managers	860	940	80	9%
6211	Sports and leisure assistants	800	800	0	0%
1224	Publicans and managers of licensed premises	730	790	60	8%
4159	Other administrative occupations n.e.c.	590	700	110	16%
4129	Financial administrative occupations n.e.c.	480	520	40	8%
3442	Sports coaches, instructors and officials	460	460	0	0%
8212	Van drivers	430	520	90	17%
7219	Customer service occupations n.e.c.	420	490	70	14%
6240	Cleaning and housekeeping managers and supervisors	400	460	60	13%
3546	Conference and exhibition managers and organisers	380	430	50	12%
1225	Leisure and sports managers	370	380	10	3%
9279	Other elementary services occupations n.e.c.	310	350	40	11%
4122	Book-keepers, payroll managers and wages clerks	290	330	40	12%
1259	Managers and proprietors in other services n.e.c.	290	310	20	6%
1221	Hotel and accommodation managers and proprietors	290	320	30	9%
7112	Retail cashiers and check-out operators	230	280	50	18%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Advanced Manufacturing and Engineering**

- 3.20 The Advanced Manufacturing and Engineering priority sector in the LLEP area comprises 81 four-digit SIC codes. Table 3.11 lists the 25 largest sub-industries based on job numbers in 2017 and shows the forecast employment change to 2023. Four of the six largest sub-industries are forecast to experience a (reasonably small) reduction in job numbers, although the largest sub-industry – Engineering Activities and Related Technical Consultancy – is forecast to grow by 600 jobs (13%).
- 3.21 Across the sector as a whole, a small reduction in job numbers (-250 jobs) is forecast between 2017 and 2023. Forty of the 81 four-digit SIC codes are forecast to experience a reduction of 10 jobs or more, compared with 14 four-digit SICs that are forecast to increase in employment by at least 10 jobs (a full breakdown of employment in the sector can be found in the forecasting results which have been submitted to the LLEP alongside this report).
- 3.22 In 2017, there were an estimated 1,810 workplace establishments operating primarily in Advanced Manufacturing and Engineering in the LLEP area.

**Table 3.11: Employment projections in Advanced Manufacturing and Engineering – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
7112	Engineering activities and related technical consultancy	4,720	5,320	600	13%
7219	Other research and experimental development on natural sciences and engineering	2,130	2,040	(90)	(4%)
2892	Manufacture of machinery for mining, quarrying and construction	1,820	1,660	(160)	(9%)
2651	Manufacture of instruments and appliances for measuring, testing and navigation	1,450	1,340	(110)	(8%)
3030	Manufacture of air and spacecraft and related machinery	1,160	1,170	10	1%
3312	Repair of machinery	1,070	1,000	(70)	(7%)
2120	Manufacture of pharmaceutical preparations	790	830	40	5%
2811	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	740	790	50	7%
3020	Manufacture of railway locomotives and rolling stock	730	990	260	36%
3091	Manufacture of motorcycles	630	630	0	0%
3320	Installation of industrial machinery and equipment	580	660	80	14%
2932	Manufacture of other parts and accessories for motor vehicles	470	360	(110)	(23%)
2612	Manufacture of loaded electronic boards	440	470	30	7%
2822	Manufacture of lifting and handling equipment	370	320	(50)	(14%)
2711	Manufacture of electric motors, generators and transformers	340	200	(140)	(41%)
2670	Manufacture of optical instruments and photographic equipment	340	360	20	6%
2630	Manufacture of communication equipment	290	260	(30)	(10%)
2841	Manufacture of metal forming machinery	290	290	0	0%
2825	Manufacture of non-domestic cooling and ventilation equipment	270	210	(60)	(22%)
2740	Manufacture of electric lighting equipment	240	180	(60)	(25%)
2899	Manufacture of other special-purpose machinery n.e.c.	200	190	(10)	(5%)
2059	Manufacture of other chemical products n.e.c.	200	200	0	0%
2611	Manufacture of electronic components	180	140	(40)	(22%)
2920	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers	180	190	10	6%
2849	Manufacture of other machine tools	170	190	20	12%

Source: Emsi

3.23 Table 3.12 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Advanced Manufacturing and Engineering based on job numbers in 2017. The forecast employment changes are generally very small: in none of the largest four-digit SOC codes does the change exceed 40 jobs. This is mirrored in the percentage changes, which only exceed +/-5% in four of the 25 four-digit occupations.



**Table 3.12: Employment projections in Advanced Manufacturing and Engineering – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
1121	Production managers and directors in manufacturing	1,090	1,060	(30)	(2.8%)
5223	Metal working production and maintenance fitters	910	890	(20)	(2.2%)
2126	Design and development engineers	870	890	20	2.3%
3545	Sales accounts and business development managers	640	620	(20)	(3.1%)
4159	Other administrative occupations n.e.c.	600	580	(20)	(3.3%)
2129	Engineering professionals n.e.c.	560	570	10	1.8%
8131	Assemblers (electrical and electronic products)	520	500	(20)	(3.8%)
2122	Mechanical engineers	470	490	20	4.3%
5241	Electricians and electrical fitters	440	420	(20)	(4.5%)
5249	Electrical and electronic trades n.e.c.	420	400	(20)	(4.8%)
3113	Engineering technicians	370	360	(10)	(2.7%)
2112	Biological scientists and biochemists	370	360	(10)	(2.7%)
9260	Elementary storage occupations	370	330	(40)	(10.8%)
5215	Welding trades	360	350	(10)	(2.8%)
4122	Book-keepers, payroll managers and wages clerks	340	320	(20)	(5.9%)
8132	Assemblers (vehicles and metal goods)	320	310	(10)	(3.1%)
8125	Metal working machine operatives	320	310	(10)	(3.1%)
2136	Programmers and software development professionals	310	320	10	3.2%
3111	Laboratory technicians	310	310	0	0.0%
8133	Routine inspectors and testers	300	300	0	0.0%
5221	Metal machining setters and setter-operators	290	280	(10)	(3.4%)
2424	Business and financial project management professionals	250	260	10	4.0%
3542	Business sales executives	250	230	(20)	(8.0%)
2121	Civil engineers	250	270	20	8.0%
5231	Vehicle technicians, mechanics and electricians	240	230	(10)	(4.2%)

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Food and Drink Manufacturing**

- 3.24 The Food and Drink Manufacturing sector comprises 32 four-digit SIC codes, 18 of which had job numbers recorded against them in 2017. These are listed in Table 3.13 and, collectively, show a forecast growth of 430 jobs between 2017 and 2023. This growth is accounted for largely by the Manufacture of Other Food Products n.e.c. (+270 jobs) and the Manufacture of Prepared Meals and Dishes (+140 jobs).
- 3.25 In 2017, there were an estimated 150 workplace establishments operating primarily in Food and Drink Manufacturing in the LLEP area.

**Table 3.13: Employment projections in Food and Drink Manufacturing – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
1089	Manufacture of other food products n.e.c.	2,540	2,810	270	11%
1013	Production of meat and poultry meat products	2,420	2,450	30	1%
1085	Manufacture of prepared meals and dishes	1,850	1,990	140	8%
1071	Manufacture of bread; manufacture of fresh pastry goods and cakes	1,410	1,470	60	4%
1031	Processing and preserving of potatoes	1,000	1,040	40	4%
1072	Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes	900	910	10	1%
1092	Manufacture of prepared pet foods	670	540	(130)	(19%)
1051	Operation of dairies and cheese making	570	540	(30)	(5%)
1107	Manufacture of soft drinks; production of mineral waters and other bottled waters	540	560	20	4%
1091	Manufacture of prepared feeds for farm animals	260	250	(10)	(4%)
1084	Manufacture of condiments and seasonings	200	250	50	25%
1082	Manufacture of cocoa, chocolate and sugar confectionery	190	190	0	0%
1105	Manufacture of beer	140	130	(10)	(7%)
1011	Processing and preserving of meat	100	110	10	10%
1039	Other processing and preserving of fruit and vegetables	50	40	(10)	(20%)
1052	Manufacture of ice cream	50	40	(10)	(20%)
1061	Manufacture of grain mill products	40	40	0	0%
1012	Processing and preserving of poultry meat	20	20	0	0%

Source: Emsi

3.26 Table 3.14 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Food and Drink Manufacturing based on job numbers in 2017. Key points include:

- None of the largest occupations in the sector are forecast to experience a net reduction in job numbers.
- However, where increases are forecast they are generally small. Only in two occupations (Food, Drink and Tobacco Process Operatives; and Packers, Bottlers, Canners and Fillers) is the increase expected to exceed 50 jobs.
- The above is reflected in the proportionate growth figures, which almost without exception are below 10%.

**Table 3.14: Employment projections in Food and Drink Manufacturing – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
8111	Food, drink and tobacco process operatives	3,950	4,070	120	3%
9134	Packers, bottlers, canners and fillers	1,670	1,740	70	4%
1121	Production managers and directors in manufacturing	610	620	10	2%
9260	Elementary storage occupations	570	590	20	4%
8222	Fork-lift truck drivers	310	310	0	0%
3545	Sales accounts and business development managers	300	320	20	7%
5223	Metal working production and maintenance fitters	290	300	10	3%
9132	Industrial cleaning process occupations	280	300	20	7%
8133	Routine inspectors and testers	260	280	20	8%
9272	Kitchen and catering assistants	250	250	0	0%
8212	Van drivers	240	250	10	4%
8211	Large goods vehicle drivers	220	220	0	0%
5432	Bakers and flour confectioners	190	190	0	0%
3116	Planning, process and production technicians	160	160	0	0%
9139	Elementary process plant occupations n.e.c.	150	150	0	0%
4122	Book-keepers, payroll managers and wages clerks	140	140	0	0%
9233	Cleaners and domestics	130	140	10	8%
5431	Butchers	130	140	10	8%
4159	Other administrative occupations n.e.c.	120	120	0	0%
4133	Stock control clerks and assistants	120	120	0	0%
3542	Business sales executives	100	110	10	10%
7111	Sales and retail assistants	90	100	10	11%
5241	Electricians and electrical fitters	90	90	0	0%
2462	Quality assurance and regulatory professionals	90	90	0	0%
2129	Engineering professionals n.e.c.	80	80	0	0%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Creative Industries**

- 3.27 The Creative Industries priority sector in the LLEP area comprises 31 four-digit SIC codes. Table 3.15 lists the 25 largest of these based on job numbers in 2017 and shows the forecast employment change to 2023. In the main, the forecast changes are small (fewer than 100 jobs), which is reflected in the sector-wide projection of 1% growth (+120 jobs) between 2017 and 2023. A full breakdown of employment in the sector can be found in the forecasting results which have been submitted to the LLEP alongside this report.
- 3.28 In 2017, there were an estimated 3,150 workplace establishments operating primarily in the Creative Industries in the LLEP area.

**Table 3.15: Employment projections in the Creative Industries – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
6202	Computer consultancy activities	3,320	3,020	(300)	(9%)
6201	Computer programming activities	1,530	1,650	120	8%
7410	Specialised design activities	1,200	1,110	(90)	(8%)
7111	Architectural activities	1,190	1,350	160	13%
7311	Advertising agencies	920	960	40	4%
9001	Performing arts	700	870	170	24%
9101	Library and archive activities	640	690	50	8%
9003	Artistic creation	350	370	20	6%
5914	Motion picture projection activities	330	390	60	18%
7420	Photographic activities	220	180	(40)	(18%)
9102	Museum activities	210	170	(40)	(19%)
9004	Operation of arts facilities	180	220	40	22%
5814	Publishing of journals and periodicals	150	140	(10)	(7%)
5911	Motion picture, video and television programme production activities	140	160	20	14%
5813	Publishing of newspapers	110	80	(30)	(27%)
7312	Media representation	100	90	(10)	(10%)
9002	Support activities to performing arts	90	120	30	33%
5811	Book publishing	80	60	(20)	(25%)
7021	Public relations and communication activities	80	70	(10)	(13%)
8552	Cultural education	80	60	(20)	(25%)
5829	Other software publishing	50	30	(20)	(40%)
6010	Radio broadcasting	50	70	20	40%
5819	Other publishing activities	40	30	(10)	(25%)
7430	Translation and interpretation activities	40	40	0	0%
3212	Manufacture of jewellery and related articles	30	30	0	0%

Source: Emsi

3.29 Table 3.16 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in the Creative Industries based on 2017 job numbers. The forecasts point to a largely static position; in fact, none of the four-digit occupations is showing a forecast net change of more than 40 jobs, be that an increase or a decrease.



**Table 3.16: Employment projections in the Creative Industries – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
2136	Programmers and software development professionals	1,100	1,100	0	0%
2139	Information technology and telecommunications professionals n.e.c.	630	590	(40)	(6%)
3421	Graphic designers	490	480	(10)	(2%)
3545	Sales accounts and business development managers	410	410	0	0%
2133	IT specialist managers	400	390	(10)	(3%)
1136	Information technology and telecommunications directors	350	340	(10)	(3%)
2431	Architects	320	360	40	13%
4159	Other administrative occupations n.e.c.	280	280	0	0%
2135	IT business analysts, architects and systems designers	260	250	(10)	(4%)
1259	Managers and proprietors in other services n.e.c.	250	260	10	4%
1132	Marketing and sales directors	240	230	(10)	(4%)
3422	Product, clothing and related designers	230	220	(10)	(4%)
3132	IT user support technicians	220	210	(10)	(5%)
4135	Library clerks and assistants	210	230	20	10%
3543	Marketing associate professionals	200	190	(10)	(5%)
2134	IT project and programme managers	190	190	0	0%
3417	Photographers, audio-visual and broadcasting equipment operators	190	190	0	0%
3412	Authors, writers and translators	170	180	10	6%
3131	IT operations technicians	170	160	(10)	(6%)
9275	Leisure and theme park attendants	170	200	30	18%
4122	Book-keepers, payroll managers and wages clerks	150	140	(10)	(7%)
2137	Web design and development professionals	140	140	0	0%
4215	Personal assistants and other secretaries	140	150	10	7%
2432	Town planning officers	140	150	10	7%
2471	Journalists, newspaper and periodical editors	130	120	(10)	(8%)

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Textile Manufacturing**

- 3.30 The Textile Manufacturing sector comprises 22 four-digit SIC codes, 17 of which had job numbers recorded against them in 2017. As shown in Table 3.17, the number of sub-industries forecast to experience a jobs increase is similar to the number forecast to experience a decrease. Most notably, the Manufacture of Other Outerwear and the Finishing of Textiles are both forecast to show strong growth (+740 jobs and +300 jobs respectively). The sector as a whole is forecast to show a net increase of 1,010 jobs (+10%) between 2017 and 2023.
- 3.31 In 2017, there were an estimated 680 workplace establishments operating primarily in Textile Manufacturing in the LLEP area.

**Table 3.17: Employment projections in Textile Manufacturing – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
1413	Manufacture of other outerwear	3,530	4,270	740	21%
1419	Manufacture of other wearing apparel and accessories	1,940	2,030	90	5%
1330	Finishing of textiles	1,900	2,200	300	16%
1439	Manufacture of other knitted and crocheted apparel	600	560	(40)	(7%)
1412	Manufacture of workwear	440	520	80	18%
1392	Manufacture of made-up textile articles, except apparel	430	450	20	5%
1431	Manufacture of knitted and crocheted hosiery	400	380	(20)	(5%)
1391	Manufacture of knitted and crocheted fabrics	170	110	(60)	(35%)
1396	Manufacture of other technical and industrial textiles	170	150	(20)	(12%)
1414	Manufacture of underwear	140	100	(40)	(29%)
1520	Manufacture of footwear	120	110	(10)	(8%)
1512	Manufacture of luggage, handbags and the like, saddlery and harness	100	100	0	0%
1320	Weaving of textiles	90	70	(20)	(22%)
1399	Manufacture of other textiles n.e.c.	60	30	(30)	(50%)
1411	Manufacture of leather clothes	50	60	10	20%
1395	Manufacture of non-wovens and articles made from non-wovens, except apparel	40	50	10	25%
1310	Preparation and spinning of textile fibres	30	40	10	33%

Source: Emsi

3.32 Table 3.18 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Textile Manufacturing based on job numbers in 2017. Key points include:

- Almost all the largest four-digit occupations are forecast to increase in job numbers between 2017 and 2023.
- The largest increase in absolute terms is expected in Sewing Machinists (+120 jobs), which is already the largest occupation within the sector.
- Packers, Bottlers, Canners and Fillers (+90 jobs) are forecast to experience the next largest increase.
- The only occupation with a forecast decrease is Textile Process Operatives, but in both absolute and proportionate terms that decrease is very small.

**Table 3.18: Employment projections in Textile Manufacturing – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
8137	Sewing machinists	1,950	2,070	120	6%
1121	Production managers and directors in manufacturing	820	890	70	9%
9134	Packers, bottlers, canners and fillers	650	740	90	14%
8113	Textile process operatives	630	610	(20)	(3%)
9260	Elementary storage occupations	480	530	50	10%
3545	Sales accounts and business development managers	360	410	50	14%
1190	Managers and directors in retail and wholesale	320	370	50	16%
3422	Product, clothing and related designers	280	320	40	14%
4159	Other administrative occupations n.e.c.	270	300	30	11%
5414	Tailors and dressmakers	220	250	30	14%
3543	Marketing associate professionals	190	220	30	16%
4122	Book-keepers, payroll managers and wages clerks	160	190	30	19%
8133	Routine inspectors and testers	150	180	30	20%
7129	Sales related occupations n.e.c.	150	190	40	27%
7111	Sales and retail assistants	150	160	10	7%
5413	Footwear and leather working trades	140	150	10	7%
7125	Merchandisers and window dressers	140	170	30	21%
9139	Elementary process plant occupations n.e.c.	130	140	10	8%
1132	Marketing and sales directors	120	140	20	17%
5419	Textiles, garments and related trades n.e.c.	120	120	0	0%
1162	Managers and directors in storage and warehousing	100	110	10	10%
4133	Stock control clerks and assistants	100	100	0	0%
4215	Personal assistants and other secretaries	90	110	20	22%
2137	Web design and development professionals	90	120	30	33%
5411	Weavers and knitters	90	90	0	0%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Sport and Physical Activity**

- 3.33 The definition of the Sport and Physical Activity sector used for this study comprises nine four-digit SIC codes, eight of which had job numbers recorded against them in 2017 (Table 3.19). The sector is forecast to show a small net increase of 290 jobs (+3%) between 2017 and 2023. More than half of this increase is forecast in one sub-industry: Activities of Sports Clubs (+290 jobs).
- 3.34 In 2017, there were an estimated 650 workplace establishments operating primarily in Sport and Physical Activity in the LLEP area.

**Table 3.19: Employment projections in Sport and Physical Activity – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
9311	Operation of sports facilities	2,970	2,920	(50)	(2%)
9312	Activities of sport clubs	2,580	2,800	220	9%
9200	Gambling and betting activities	1,430	1,550	120	8%
4764	Retail sale of sporting equipment in specialised stores	880	910	30	3%
9319	Other sports activities	790	840	50	6%
9313	Fitness facilities	640	640	0	0%
7721	Renting and leasing of recreational and sports goods	130	70	(60)	(46%)
3230	Manufacture of sports goods	60	40	(20)	(33%)

Source: Emsi

3.35 Table 3.20 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Sport and Physical Activity based on job numbers in 2017. The forecast changes across all of these occupations are relatively small; in no cases do they exceed 50 jobs.



**Table 3.20: Employment projections in Sport and Physical Activity – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
3442	Sports coaches, instructors and officials	950	1,000	50	5%
6211	Sports and leisure assistants	810	810	0	0%
7111	Sales and retail assistants	560	590	30	5%
4129	Financial administrative occupations n.e.c.	430	470	40	9%
3443	Fitness instructors	430	420	(10)	(2%)
1225	Leisure and sports managers	420	430	10	2%
9233	Cleaners and domestics	300	310	10	3%
4216	Receptionists	290	290	0	0%
5114	Groundsmen and greenkeepers	290	320	30	10%
3441	Sports players	290	320	30	10%
9274	Bar staff	270	260	(10)	(4%)
1259	Managers and proprietors in other services n.e.c.	250	270	20	8%
9273	Waiters and waitresses	240	230	(10)	(4%)
9272	Kitchen and catering assistants	230	230	0	0%
4159	Other administrative occupations n.e.c.	210	210	0	0%
6139	Animal care services occupations n.e.c.	180	180	0	0%
9275	Leisure and theme park attendants	170	170	0	0%
7219	Customer service occupations n.e.c.	140	150	10	7%
3545	Sales accounts and business development managers	140	140	0	0%
3546	Conference and exhibition managers and organisers	130	140	10	8%
4122	Book-keepers, payroll managers and wages clerks	110	110	0	0%
5434	Chefs	100	100	0	0%
9279	Other elementary services occupations n.e.c.	90	90	0	0%
1190	Managers and directors in retail and wholesale	90	90	0	0%
5436	Catering and bar managers	80	80	0	0%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## **Energy**

- 3.36 The definition of the Energy sector used for this study comprises 15 four-digit SIC codes, 11 of which had job numbers recorded against them in 2017. As shown in Table 3.21, whilst some relatively small (in absolute terms) fluctuations are forecast at sub-industry level, these cancel each out in terms of forecast change for the sector as a whole.
- 3.37 In 2017, there were an estimated 80 workplace establishments operating primarily in Energy in the LLEP area.

**Table 3.21: Employment projections in Energy – four-digit sub-industries**

SIC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
3521	Manufacture of gas	1,190	1,290	100	8%
3513	Distribution of electricity	980	1,100	120	12%
2825	Manufacture of non-domestic cooling and ventilation equipment	270	210	(60)	(22%)
2740	Manufacture of electric lighting equipment	240	180	(60)	(25%)
2712	Manufacture of electricity distribution and control apparatus	110	70	(40)	(36%)
3522	Distribution of gaseous fuels through mains	80	40	(40)	(50%)
3512	Transmission of electricity	70	30	(40)	(57%)
4222	Construction of utility projects for electricity and telecommunications	40	60	20	50%
2521	Manufacture of central heating radiators and boilers	30	30	0	0%
3511	Production of electricity	30	30	0	0%
2720	Manufacture of batteries and accumulators	20	20	0	0%

Source: Emsi

3.38 Table 3.22 shows the 2017 and 2023 forecast employment levels across the largest 25 four-digit occupations in Energy based on job numbers in 2017. Unsurprisingly given the SIC data, it is a largely static picture (the percentage changes in some cases are as high as 25% but that is due to the small base numbers).

**Table 3.22: Employment projections in Energy – four-digit occupations**

SOC	Description	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
5314	Plumbers and heating and ventilating engineers	250	260	10	4%
5241	Electricians and electrical fitters	160	150	(10)	(6%)
3545	Sales accounts and business development managers	150	150	0	0%
7219	Customer service occupations n.e.c.	120	130	10	8%
2129	Engineering professionals n.e.c.	100	100	0	0%
4159	Other administrative occupations n.e.c.	90	100	10	11%
5249	Electrical and electronic trades n.e.c.	90	90	0	0%
7220	Customer service managers and supervisors	90	90	0	0%
7211	Call and contact centre occupations	80	90	10	13%
1121	Production managers and directors in manufacturing	70	70	0	0%
2123	Electrical engineers	70	70	0	0%
2424	Business and financial project management professionals	60	70	10	17%
2423	Management consultants and business analysts	50	60	10	20%
8131	Assemblers (electrical and electronic products)	50	40	(10)	(20%)
8149	Construction operatives n.e.c.	50	50	0	0%
3563	Vocational and industrial trainers and instructors	40	50	10	25%
3113	Engineering technicians	40	50	10	25%
8114	Chemical and related process operatives	40	50	10	25%
4122	Book-keepers, payroll managers and wages clerks	40	40	0	0%
5223	Metal working production and maintenance fitters	40	40	0	0%
3132	IT user support technicians	40	40	0	0%
4133	Stock control clerks and assistants	40	40	0	0%
5250	Skilled metal, electrical and electronic trades supervisors	40	40	0	0%
7122	Debt, rent and other cash collectors	40	40	0	0%
2421	Chartered and certified accountants	40	40	0	0%

Source: Emsi. Note that the figures show occupation numbers for this sector only, not for the occupations as a whole across the LLEP area.

## 4 OCCUPATION PROJECTIONS

### One-digit SOC Code Projections

- 4.1 Employment in the LLEP area is forecast to increase in all one-digit SOC groupings between 2017 and 2023 (Figure 4.1).

**Figure 4.1: Forecast employment change in the LLEP area by one-digit SOC groupings**



Source: Emsi

4.2 The largest job number increases, in absolute terms, are forecast in:

- Elementary Occupations (+3,760 jobs);
- Professional Occupations (+3,400 jobs);
- Associate Professional and Technical Occupations (+2,240 jobs).

4.3 The following occupations are forecast to see the smallest absolute employment increases:

- Process, Plant and Machine Operatives (+1,260 jobs);
- Caring, Leisure and Other Service Activities (+1,500 jobs);
- Managers, Directors and Senior Officials (+1,670 jobs).

4.4 As with the industry level projections, it is also important to consider the replacement demand for occupations. Table 4.1 shows replacement demand (alongside expansion demand), while Table 4.2 provides a summary of the total employment requirement for each one-digit SOC. Key points to note include:

- Replacement demand is forecast to be highest in Professional Occupations (23,980 jobs, which is 16% of the total replacement demand requirement across the LLEP area).
- Professional Occupations also has the largest total jobs requirement (27,380 jobs), followed by Elementary Occupations (25,580 jobs) and Administrative and Secretarial Occupations (21,140 jobs).
- Across the LLEP area as a whole, for every (net) additional job that is created between 2017 and 2023, eight existing jobs will need to be filled as a consequence of replacement demand. Occupations with above average replacement demand forecasts include:
  - Process, Plant and Machine Operatives (ten replacement jobs for each net additional job).
  - Administrative and Secretarial Occupations (nine replacement jobs for each net additional job);
  - Managers, Directors and Senior Officials (nine replacement jobs for each net additional job);
  - Caring, Leisure and Other Service Occupations (nine replacement jobs for each net additional job).

**Table 4.1: Expansion and replacement demand in the LLEP area at one-digit SOC level**

			Expansion Demand (2017-2023)		Replacement Demand (2017-2023)	Expansion Demand (2017-2030)	
One-digit SOC	2017 jobs	2023 forecast	2017-2023 change (no.)	2017-2023 change (%)	2017-2023 change (no.)	2017-2030 change (no.)	2017-2030 change (%)
Managers, Directors and Senior Officials	48,900	50,570	1,670	3.4%	14,570	2,990	6%
Professional Occupations	81,820	85,220	3,400	4.1%	23,980	5,170	6%
Associate Professional and Technical Occupations	62,130	64,370	2,240	3.6%	17,060	3,520	6%
Administrative and Secretarial Occupations	60,390	62,550	2,160	3.6%	18,980	4,090	7%
Skilled Trades Occupations	45,560	47,390	1,830	4.0%	12,500	3,710	8%
Caring, Leisure and Other Service Occupations	39,400	40,900	1,500	3.8%	13,040	3,020	8%
Sales and Customer Service Occupations	43,830	45,510	1,680	3.8%	12,180	2,640	6%
Process, Plant and Machine Operatives	42,910	44,170	1,260	2.9%	12,020	2,890	7%
Elementary Occupations	74,260	78,020	3,760	5.1%	21,820	7,760	10%
<b>Total</b>	<b>499,200</b>	<b>518,680</b>	<b>19,480</b>	<b>4%</b>	<b>146,150</b>	<b>35,770</b>	<b>7%</b>

Source: Emsi. Column totals differ slightly from the figures shown in the 'Total' row, and to the equivalent figures in Chapter 2, due to rounding.

The figures above do not include the new jobs associated with the developments in the logistics sector at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3.



**Table 4.2: Expansion and replacement demand in summary (one-digit SOC)**

One-digit SOC	2017-2023 Expansion Demand	2017-2023 Replacement Demand	2017-2023 Total Requirement
Professional occupations	3,400	23,980	27,380
Elementary occupations	3,760	21,820	25,580
Administrative and secretarial occupations	2,160	18,980	21,140
Associate professional and technical occupations	2,240	17,060	19,300
Managers, directors and senior officials	1,670	14,570	16,240
Caring, leisure and other service occupations	1,500	13,040	14,540
Skilled trades occupations	1,830	12,500	14,330
Sales and customer service occupations	1,680	12,180	13,860
Process, plant and machine operatives	1,260	12,020	13,280
<b>Total</b>	<b>19,480</b>	<b>146,150</b>	<b>165,630</b>

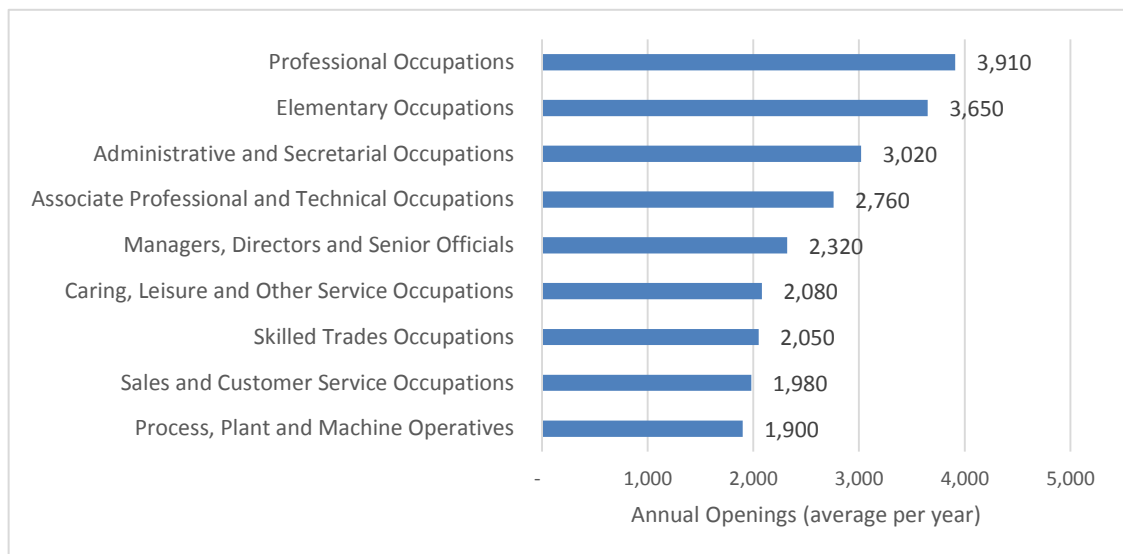
Source: Emsi. Column totals differ slightly from the figures shown in the 'Total' row, and to the equivalent figures in Chapter 2, due to rounding.

The figures above do not include the new jobs associated with the developments in the logistics sector at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3.

## Annual openings

- 4.5 The term ‘annual openings’ refers to the total number of job vacancies, across expansion and replacement demand combined, that will need to be filled each year in the LLEP area. This reflects new job growth and employees who leave the workforce. Between 2017 to 2023 inclusive, the average annual openings figure is calculated by dividing the total requirement (as shown in Table 4.2) by seven (the number of years).
- 4.6 The results are shown in Figure 4.2. One-digit level occupations with the highest forecast annual openings are:
- Professional Occupations (an average of 3,910 openings per year);
  - Elementary Occupations (3,650);
  - Administrative and Secretarial (3,020).

**Figure 4.2: Estimated annual openings at one-digit SOC level (2017-2023)**



Source: Emsi

## Two-digit SOC code projections

4.7 There are 25 two-digit level SOC occupations in total. For each of these, the 2017 and 2023 (forecast) employment figures, and the total jobs requirement (expansion plus replacement demand) are shown in Table 4.3. Headline messages include:

- The three occupations expected to have the largest total job requirements are: Elementary Administration and Service Occupations (21,540 jobs), Administrative Occupations (16,730 jobs) and Business and Public Service Associate Professionals (12,270 jobs). Together, these occupations account for 31% of the total job requirements in the LLEP area between 2017 and 2023.
- Proportionate jobs growth (relative to 2017 employment) is forecast to be highest in Health Professionals (+6.6%) and Textiles, Printing and Other Skilled Trades (+6.1%) and lowest in Protective Service Occupations (+0.1%) and Leisure, Travel and Related Personal Service Occupations (+1.6%).
- In proportionate terms (relative to 2017 employment), replacement demand is forecast to be highest amongst Skilled Agricultural and Related Trades, Other Managers and Proprietors and Leisure, Travel and Related Personal Service Occupations. It is forecast to be lowest in Protective Service Occupations and Science, Engineering and Technology Associate Professionals.

**Table 4.3: Employment projections at two-digit SOC code level**

<b>Two-digit SOC</b>	<b>2017 Jobs</b>	<b>2023 Forecast</b>	<b>2017-2023 Expansion Demand</b>	<b>2017-2023 Replacement Demand</b>	<b>2017-2023 Total Requirement</b>
Elementary administration and service occupations	61,170	64,380	3,210	18,330	21,540
Administrative occupations	48,220	49,830	1,610	15,120	16,730
Business and public service associate professionals	37,760	39,370	1,610	10,660	12,270
Caring personal service occupations	32,290	33,670	1,380	10,520	11,900
Corporate managers and directors	36,950	38,220	1,270	10,280	11,550
Sales occupations	32,980	34,070	1,090	9,250	10,340
Teaching and educational professionals	22,110	22,630	520	6,970	7,490
Transport and mobile machine drivers and operatives	20,620	21,170	550	6,920	7,470
Business, media and public service professionals	19,880	20,860	980	6,480	7,460
Health professionals	19,240	20,510	1,270	5,810	7,080
Process, plant and machine operatives	22,290	23,000	710	5,110	5,820
Science, research, engineering and technology professionals	20,590	21,220	630	4,730	5,360
Skilled metal, electrical and electronic trades	18,980	19,400	420	4,410	4,830
Other managers and proprietors	11,950	12,340	390	4,290	4,680
Textiles, printing and other skilled trades	12,530	13,290	760	3,660	4,420
Secretarial and related occupations	12,170	12,720	550	3,860	4,410
Elementary trades and related occupations	13,100	13,640	540	3,480	4,020
Customer service occupations	10,850	11,440	590	2,930	3,520
Skilled construction and building trades	10,070	10,520	450	2,700	3,150
Leisure, travel and related personal service occupations	7,110	7,230	120	2,510	2,630
Culture, media and sports occupations	6,410	6,660	250	2,070	2,320
Science, engineering and technology	8,850	9,110	260	2,020	2,280

Table 4.3: Employment projections at two-digit SOC code level					
Two-digit SOC	2017 Jobs	2023 Forecast	2017-2023 Expansion Demand	2017-2023 Replacement Demand	2017-2023 Total Requirement
associate professionals					
Skilled agricultural and related trades	3,980	4,180	200	1,740	1,940
Health and social care associate professionals	5,520	5,620	100	1,650	1,750
Protective service occupations	3,600	3,600	-	660	660
<b>Total</b>	<b>499,200</b>	<b>518,680</b>	<b>19,480</b>	<b>146,150</b>	<b>165,630</b>

Source: Emsi. Column totals differ slightly from the figures shown in the 'Total' row, and to the equivalent figures in Chapter 2, due to rounding.

The figures above do not include the new jobs associated with the developments in the logistics sector at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3.

## Four-digit SOC code projections

- 4.8 Table 4.4 shows the top 25 occupations based on expansion and replacement demand requirements combined at four-digit SOC level. These occupations account for 41% of the total jobs requirement in the LLEP area between 2017 and 2023. A full four-digit SOC listing is available in the accompanying Excel spreadsheets.

Table 4.4: Four-digit SOC occupations with the highest forecast demand for jobs (2017-2023)			
Four-digit SOC	Expansion Demand to 2023	Replacement Demand to 2023	Total Demand
Sales and retail assistants	460	5,090	5,550
Elementary storage occupations	580	4,720	5,300
Other administrative occupations n.e.c.	600	4,180	4,780
Care workers and home carers	610	3,650	4,260
Nurses	680	3,030	3,710
Kitchen and catering assistants	710	2,620	3,330
Book-keepers, payroll managers and wages clerks	430	2,680	3,110
Cleaners and domestics	270	2,780	3,050
Large goods vehicle drivers	250	2,720	2,970
Sales accounts and business development managers	380	2,510	2,890
Nursing auxiliaries and assistants	420	1,930	2,350
Managers and directors in retail and wholesale	320	2,030	2,350
Waiters and waitresses	540	1,710	2,250
Packers, bottlers, canners and fillers	330	1,880	2,210
Primary and nursery education teaching professionals	100	1,950	2,050
Bar staff	400	1,590	1,990
Production managers and directors in manufacturing	210	1,770	1,980
Teaching assistants	100	1,760	1,860
Security guards and related occupations	450	1,340	1,790
Customer service occupations n.e.c.	280	1,400	1,680
Secondary education teaching professionals	110	1,560	1,670
Van drivers	150	1,480	1,630
Chefs	350	1,160	1,510
Receptionists	150	1,320	1,470
Medical practitioners	310	1,130	1,440
<b>Totals</b>	<b>9,190</b>	<b>57,990</b>	<b>67,180</b>

Source: Emsi

## 5 T Level projections

### Introduction

- 5.1 T Levels are new two-year, technical programmes designed to equip young people with the skills needed by industry. Beginning in 2020, they are being introduced in phases and will offer students aged 16 to 18 a technical alternative to A levels. T Levels will provide:
- Technical knowledge and practical skills specific to a chosen industry or occupation;
  - An industry placement of at least 45 days;
  - Relevant skills in maths, English and digital;
  - Important workplace skills.
- 5.2 There is a framework of 15 occupational routes which apply across the new T level programme and across apprenticeships. A 'route' in this context refers to a group of occupations which share some common knowledge, skills and behaviours. Within each route is a number of pathways which reflect different occupational specialisms. Four routes are expected to be delivered through apprenticeships only<sup>21</sup>.
- 5.3 The analysis below uses T Level occupational maps developed by the Gatsby Foundation. These enable the assignment of job numbers, at four-digit SOC level, to each T Level route and pathway. There is no double counting of jobs numbers across routes or pathways.

### Headline results

- 5.4 As shown below in Table 5.1, the net increase in jobs across the 15 T Level routes as a whole is expected to exceed 14,000 between 2017 and 2023. The largest increase in absolute terms is forecast in Sales, Marketing and Procurement (+2,360 jobs). The largest proportionate increase is forecast in Catering and Hospitality (+6.3%).
- 5.5 The smallest increase in absolute terms is forecast in Hair and Beauty (+80 jobs), while the smallest proportionate increase is forecast in Protective Services (+2.1%).
- 5.6 No route is expected to experience a reduction in job numbers between 2017 and 2023.

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<sup>21</sup> These are transport and logistics; sales, marketing and procurement; social care; and protective services.

Table 5.1: T Level projections by route				
Route	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Sales, Marketing and Procurement	63,990	66,350	2,360	3.7%
Management and Administration	45,270	47,040	1,770	3.9%
Catering and Hospitality	43,420	46,140	2,720	6.3%
Engineering and Manufacturing	40,840	42,160	1,320	3.2%
Transport and Logistics*	33,870	34,700	830	2.5%
Construction	18,750	19,450	700	3.7%
Health and Science	18,620	19,560	940	5.0%
Legal, Financial and Accounting	18,590	19,380	790	4.2%
Digital	16,540	17,020	480	2.9%
Agriculture, Environmental and Animal Care	14,970	15,600	630	4.2%
Education and Childcare	14,610	14,940	330	2.3%
Care Services	12,890	13,560	670	5.2%
Creative and Design	10,430	10,800	370	3.5%
Protective Services	6,290	6,420	130	2.1%
Hair and Beauty	2,230	2,310	80	3.6%
<b>Total</b>	<b>361,310</b>	<b>375,430</b>	<b>14,120</b>	<b>3.9%</b>

Source: Emsi

\*does not include the new jobs associated with the developments in the logistics sector at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3 for further details.

## Sales, Marketing and Procurement

- 5.7 The Sales, Marketing and Procurement route comprises four pathways (Customer Service, Marketing, Procurement and Retail), all of which are forecast to record an increase in job numbers between 2017 and 2023 (Table 5.2). The largest increase (in absolute terms) is forecast in Retail which has by far the most jobs of all the pathways in this route.



Table 5.2: T Level projections: Sales, Marketing and Procurement				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Retail	35,450	36,630	1,180	3.3%
Marketing	16,170	16,850	680	4.2%
Customer Service	10,630	11,030	400	3.8%
Procurement	1,740	1,840	100	5.7%
<b>Total</b>	<b>63,990</b>	<b>66,350</b>	<b>2,360</b>	<b>3.7%</b>

Source: Emsi

## Management and Administration

- 5.8 The Management and Administration route comprises two pathways: Human Resources and Management and Administration, both of which are forecast to show jobs number increases between 2017 and 2023. Proportionately the increases are similar, although in absolute terms they vary considerably (Table 5.3).

Table 5.3: T Level projections: Management and Administration				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Human Resources	5,180	5,410	230	4.4%
Management and Administration	40,090	41,630	1,540	3.8%
<b>Total</b>	<b>45,270</b>	<b>47,040</b>	<b>1,770</b>	<b>3.9%</b>

Source: Emsi

## Catering and Hospitality

- 5.9 The Catering and Hospitality route comprises two pathways: Catering and Hospitality, which together are forecast to grow by 2,720 jobs between 2017 and 2023. More than four-fifths of that growth (81%) is forecast in Hospitality (Table 5.4).

Table 5.4: T Level projections: Catering and Hospitality				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Catering	5,960	6,490	530	8.9%
Hospitality	37,460	39,650	2,190	5.8%
<b>Total</b>	<b>43,420</b>	<b>46,140</b>	<b>2,720</b>	<b>6.3%</b>

Source: Emsi

## Engineering and Manufacturing

- 5.10 The Engineering and Manufacturing route comprises three pathways: Engineering, Design, Development and Control; Engineering, Manufacturing and Process; and Maintenance, Installation and Repair. All three are forecast to record job number increases between 2017 and 2023, resulting in a total forecast increase of 1,320 jobs (Table 5.5).

**Table 5.5: T Level projections: Engineering and Manufacturing**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Engineering, Design, Development and Control	8,500	8,790	290	3.4%
Engineering, Manufacturing and Process	23,140	23,790	650	2.8%
Maintenance, Installation & Repair	9,200	9,580	380	4.1%
<b>Total</b>	<b>40,840</b>	<b>42,160</b>	<b>1,320</b>	<b>3.2%</b>

Source: Emsi

## Transport and Logistics

- 5.11 The Transport and Logistics route comprises two pathways: Transport and Logistics. Very similar absolute changes in job numbers are forecast in each, although the proportionate increase is larger in Logistics (Table 5.6).

**Table 5.6: T Level projections: Transport and Logistics**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Transport	20,360	20,770	410	2.0%
Logistics	13,510	13,930	420	3.1%
<b>Total</b>	<b>33,870</b>	<b>34,700</b>	<b>830</b>	<b>2.5%</b>

Source: Emsi

\*does not include the new jobs associated with the developments in the logistics sector at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth. See 'Logistics and Distribution' in Chapter 3 for further details.

## Construction

- 5.12 The Construction route comprises three pathways: Building Services Engineering; Design; Onsite Construction and Surveying and Planning. Jobs growth between 2017 and 2023 is forecast to be driven by the first two of these (accounting for 670 of the 700 job increase – Table 5.7).

Table 5.7: T Level projections: Construction				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Onsite Construction	10,580	11,040	460	4.3%
Building Services Engineering	7,910	8,120	210	2.7%
Design, Surveying & Planning	260	290	30	11.5%
<b>Total</b>	<b>18,750</b>	<b>19,450</b>	<b>700</b>	<b>3.7%</b>

Source: Emsi

## Health and Science

5.13 The Health and Science route comprises four pathways:

- Community Exercise, Fitness and Health;
- Health;
- Healthcare Science;
- Science.

5.14 Healthcare Science is forecast to show the largest growth, in both absolute and proportionate terms, between 2017 and 2023 (Table 5.8).

Table 5.8: T Level projections: Health and Science				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Health	6,460	6,780	320	5.0%
Healthcare Science	6,450	6,880	430	6.7%
Community Exercise, Fitness and Health	3,930	4,060	130	3.3%
Science	1,780	1,840	60	3.4%
<b>Total</b>	<b>18,620</b>	<b>19,560</b>	<b>940</b>	<b>5.0%</b>

Source: Emsi

## Legal, Financial and Accounting

5.15 The Legal, Financial and Accounting route comprises three pathways: Legal, Financial and Accounting. Of these, it is Accounting that is forecast to drive the jobs growth between 2017 and 2023 (Table 5.9).

**Table 5.9: T Level projections: Legal, Financial and Accounting**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Accounting	8,590	9,030	440	5.1%
Financial	8,830	9,080	250	2.8%
Legal	1,170	1,270	100	8.5%
<b>Total</b>	<b>18,590</b>	<b>19,380</b>	<b>790</b>	<b>4.2%</b>

Source: Emsi

## Digital

- 5.16 The Digital route comprises three pathways: Data and Digital Business Services; IT Support and Services; and Software and Applications Design and Development. A combined increase of 490 jobs is predicted across these pathways, three-fifths of which (60%) is expected to be in Data and Digital Business Services (Table 5.10).

**Table 5.10: T Level projections: Digital**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Data and Digital Business Services	6,500	6,790	290	4.5%
IT Support and Services	6,750	6,840	90	1.3%
Software and Applications Design and Development	3,290	3,390	100	3.0%
<b>Total</b>	<b>16,540</b>	<b>17,020</b>	<b>480</b>	<b>2.9%</b>

Source: Emsi

## Agriculture, Environmental and Animal Care

- 5.17 The Agriculture, Environmental and Animal Care route comprises two pathways: Agriculture, Land Management and Production; and Animal Care and Management. A very small reduction in job numbers is forecast in the latter of these, while the former is forecast to grow by 640 jobs (Table 5.11).

**Table 5.11: T Level projections: Agriculture, Environmental and Animal Care**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Agriculture, Land Management and Production	13,270	13,910	640	4.8%
Animal Care and Management	1,700	1,690	-10	-0.6%
<b>Total</b>	<b>14,970</b>	<b>15,600</b>	<b>630</b>	<b>4.2%</b>

Source: Emsi

## Education and Childcare

- 5.18 There is currently only one pathway within the Childcare and Education route. Job numbers within this pathway are expected to increase by 330 between 2017 and 2023 (Table 5.12).

Table 5.12: T Level projections: Childcare and Education				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Education	14,610	14,940	330	2.3%

Source: Emsi

## Care Services

- 5.19 The Care Services route currently has one pathway, within which an increase of 670 jobs is expected between 2017 and 2023 (Table 5.13).

Table 5.13: T Level projections: Care Services				
Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Care services	12,890	13,560	670	5.2%

Source: Emsi

## Creative and Design

- 5.20 The Creative and Design route comprises three pathways:

- Craft and Design;
- Cultural Heritage and Visitor Attractions;
- Media, Broadcast and Production.

- 5.21 An increase of 370 jobs is forecast across the three pathways combined between 2017 and 2023, the vast majority of which (280 jobs) is forecast to occur in Craft and Design (Table 5.14).

**Table 5.14: T Level projections: Creative and Design**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Craft and Design	7,470	7,750	280	3.7%
Media, Broadcast and Production	2,620	2,700	80	3.1%
Cultural Heritage and Visitor Attractions	340	350	10	2.9%
<b>Total</b>	<b>10,430</b>	<b>10,800</b>	<b>370</b>	<b>3.5%</b>

Source: Emsi

## Protective Services

5.22 There is currently one pathway in the Protective Services route. This is showing a forecast increase of 130 jobs between 2017 and 2023 (Table 5.15).

**Table 5.15: T Level projections: Protective Services**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Protective Services	6,290	6,420	130	2.1%

Source: Emsi

## Hair and Beauty

5.23 The Hair and Beauty route currently has one pathway. Job numbers in this pathway are forecast to increase by 80 jobs between 2017 and 2023 (Table 5.16).

**Table 5.16: T Level projections: Hair and Beauty**

Pathway	2017 Jobs	2023 Jobs	2017-2023 Change (No.)	2017-2023 Change (%)
Hair, Beauty and Aesthetics	2,230	2,310	80	3.6%
<b>Total</b>	<b>2,230</b>	<b>2,310</b>	<b>80</b>	<b>3.6%</b>

Source: Emsi

## 6 THE EMPLOYER PERSPECTIVE

### Introduction

- 6.1 A total of 98 employers with a base in the LLEP area contributed to Skills for the Future 2018-2030. They did this via an online survey, group consultation sessions and one-to-one telephone consultations. Note that whilst a sample of 98 employers gives an overall margin of error of 9.9% in the results<sup>22</sup>, the sectoral and size profiles of the employers contributing to the study do not reflect those of the LLEP business base as a whole. As such, the results should be viewed as indicative rather than statistically robust. Chapter 8 presents insights from larger, more robust business surveys.
- 6.2 Tables 6.1 and 6.2 show the sectoral and size profile of the employers that contributed to Skills for the Future 2018-2030.

**Table 6.1: Sector breakdown of employers contributing to the Skills for the Future study**

Sector	No. Employers	% Employers
Manufacturing	9	9.2%
Professional, scientific and technical	8	8.2%
Business administration and support services	7	7.1%
Education	5	5.1%
Construction	5	5.1%
Information & communication	5	5.1%
Transport and storage	5	5.1%
Financial and insurance	4	4.1%
Health	4	4.1%
Retail	4	4.1%
Accommodation and food services	3	3.1%
Property	2	2.0%
Motor trades	2	2.0%
Arts, entertainment, recreation and other services	1	1.0%
Engineering	1	1.0%
Agriculture, forestry and fishing	1	1.0%
Public administration and defence	1	1.0%
Mining, quarrying and utilities	1	1.0%
Charity/voluntary	1	1.0%
Not provided	29	29.6%
<b>Totals</b>	<b>98</b>	<b>100%</b>

Source: York Consulting

<sup>22</sup> With a confidence level of 95%.

Table 6.2: Size breakdown of employers contributing to the Skills for the Future study		
Company size	No. Employers	% Employers
1 (sole trader)	2	2.0%
2 to 9	13	13.3%
10 to 49	14	14.3%
50 to 249	11	11.2%
250+	15	15.3%
Not provided	43	43.9%
<b>Totals</b>	<b>98</b>	<b>100%</b>

Source: York Consulting

## Work readiness of young people aged under 25

- 6.3 In the 2016 Skills for the Future study, one third of businesses rated the work readiness of the young people aged under 25 they had recently recruited as either 'very good' or 'good'. They cited issues with communication and conversational skills, business/sector knowledge, unrealistic expectations on entering employment and work ethic as the main reasons why that proportion was not higher.
- 6.4 Recognising that the employer samples in the 2016 and 2018 studies are different, and also noting that both sets of survey results carry quite high margins of error, the 2018 results look slightly more positive:
- Nearly half (44%) of the employers that had recently recruited one or more young people into a low skilled role rated their work readiness as either 'very good' or 'good', compared with 35% who answered 'fair' and 21% who answered 'poor'.
  - Where young people had been recruited into medium skilled jobs, employers were more likely to select 'fair' than 'good or very good'. However, they were no more likely to select 'poor' than they were when referring to low skilled jobs.
  - Understandably, few employers had recruited young people into high skilled jobs. Those that had were less positive about the work readiness of the young people for those posts, although a quarter nonetheless answered 'very good' or 'good'.
- 6.5 The qualitative consultations with employers uncovered a very broad range of views on whether or not the work readiness of young people in the LLEP area is, on average, improving over time. This range includes employers (typically, although not exclusively, members of the Enterprise Advisor network) who are confident that improvements are occurring, through to those who are adamant that, on average, young people are becoming less work ready.
- 6.6 Despite this array of views, the general consensus across the employer sample was that young people's strongest work readiness attributes are typically enthusiasm for the role and IT/digital skills and literacy.



6.7 Their weakest attributes are reported to be:

- Communication/conversational skills (echoing the 2016 findings);
- Problem-solving skills and resilience (i.e. not giving up when faced with challenges);
- Prior experience of the world of work.

6.8 Although not often mentioned in the survey feedback, poor quality CVs, application forms and covering letters were regularly mentioned by employers during the qualitative consultations. There was evident frustration about the prevalence of errors, inconsistencies and poor formatting within application paperwork from young people, with employers explaining that these mistakes can prevent (potentially very able) young people from even being considered for a vacancy.

*“I don’t think they realise just how important this piece of paper [their CV or application form] really is. I see far too many that are littered with errors and too many that use text-speak.” Employer*

*“They could be really able and really talented, but they’re not even getting through the front door because of the state of their CV.” Employer*

6.9 More so than in the 2016 study, employers agreed that improving the work readiness of young people is best achieved through multi-partner input, i.e. that education and skills providers, parents, the young people themselves and employers all have a part to play. Several examples were provided of where employers – both within and outside the Enterprise Adviser network – are attending careers fairs, giving talks in schools and undertaking mock interviews.

6.10 Overwhelmingly, time pressures and day-to-day business demands emerged as the main constraining factors that prevent employers from being involved in school/college-facing activity to a greater extent. Occasionally in the survey feedback they questioned the business benefits of doing so, or they cited the impracticality of being asked by schools to take part at short notice, but in the main they said that taking time away from their business was the primary issue.

### **Employability of adults and older workers**

6.11 A new addition for the 2018 study was to obtain employers’ views on the employability skills of adults aged 25-49 and 50+. The main messages here are that:

- Employers were generally positive about the employability skills of adults aged 25-49 and 50+. Regardless of the skills levels of the jobs into which they had been recruited, only by exception did any employers answer ‘poor’ when asked about their employability skills.

- Views were slightly more positive towards workers aged 50+ than those aged 25-49. In fact, no employer suggested that the employability skills of their recent recruits aged 50+ had been 'poor'. More than three quarters answered 'good' or 'very good', regardless of the skills level of the job.
- Attitude to work, prior experience and a sound understanding of the requirements of the role were frequently highlighted as the employability strengths of new recruits aged 25-49 and 50+.
- The weakest employability attribute, for workers in both age brackets, was reported to be IT skills.

## **Apprenticeships**

6.12 Amongst the employers in the sample that employ apprentices, views were evenly split on whether it has been easy or difficult to fill recent apprenticeship vacancies. The employers who have found it difficult typically attribute this to applicants not having the right skills or personal attributes.

6.13 The employers who do not employ apprentices were asked why that is the case. Three common themes were evident in their responses:

- They do not believe that they have a need for apprentices in their business;
- They feel they would struggle to find the time to support an apprentice;
- They have employed apprentices in the past but say that it did not work out well.

6.14 The research also sought to explore the extent to which recent policy developments (most notably the introduction of the levy and the creation of new Apprenticeship Standards) have changed employers' behaviour towards apprenticeships. The relatively small proportion of employers in the sample that employ apprentices makes it difficult to draw any firm conclusions on this, however:

- Changes in behaviour were most apparent amongst larger public sector employers<sup>23</sup>. They spoke of:
  - Building apprenticeships into their succession planning strategies;
  - Introducing/increasing their participation in higher and degree level apprenticeships (e.g. in leadership and management and social work);
  - Having concerns about the capacity of certain departments/divisions to create a sufficient volume of opportunities in order for the organisation as a whole to meet its apprenticeship targets.
- Only by exception did employers in the sample say that any of their current apprentices were existing members of staff at the point that they began their apprenticeship. In other words, there was no evidence to suggest that the levy

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<sup>23</sup> Public sector bodies with 250 or more staff in England have a target to employ an average of at least 2.3% of their staff as new apprentice starts over the period of 1 April 2017 to 31 March 2021.

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had prompted employers to 'transfer' existing members of staff onto apprenticeships.

- Likewise, there was no evidence to suggest that the channels through which they recruit apprentices (company websites, engaging with schools and colleges etc.) had changed significantly over the past two years.
- It appears that some large(r) employers have taken the strategic decision to effectively write the levy off as a tax. Larger employers operating in adult social care, for example, questioned the business benefits of taking on entry level staff as apprentices, particularly as the sector does not currently have licence to practice obligations.

6.15 There was a general consensus amongst the employers that apprenticeships (including higher and degree apprenticeships) are becoming better understood by employers, prospective learners and parents. This is reportedly being helped by:

- The financial implications of recent policy changes (namely the levy) 'forcing' some employers to deepen their knowledge of apprenticeships;
- Universities offering more degree level apprenticeships with better defined career pathways;
- High profile, blue-chip companies offering degree apprenticeship programmes (e.g. PwC's Flying Start scheme);
- A greater willingness on the part of some schools to engage with post-16 providers on awareness raising about apprenticeships amongst their pupils.

6.16 However, equally common was the view that there is still considerable work to be done in order for apprenticeships, and the potential they offer to young people, to be more accurately understood, especially amongst parents. The research found broad support for co-ordinated local and/or national campaign work to better promote apprenticeships, both in terms of the different levels and routeways that exist and the career and business benefits that they offer. Some employers suggested that representative bodies, such as the Chambers, the Institute of Directors, the Federation of Small Businesses and the Confederation of British Industry, could work more closely together to promote a strong and consistent message to their members about apprenticeships.

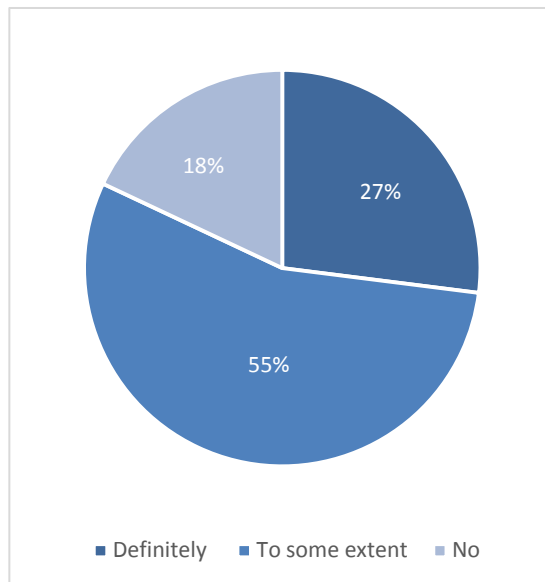
*"It [accurate knowledge of apprenticeships] is improving, but there's a long way to go, especially with parents. Many of them still see apprenticeships as second class."*

Employer

## Training

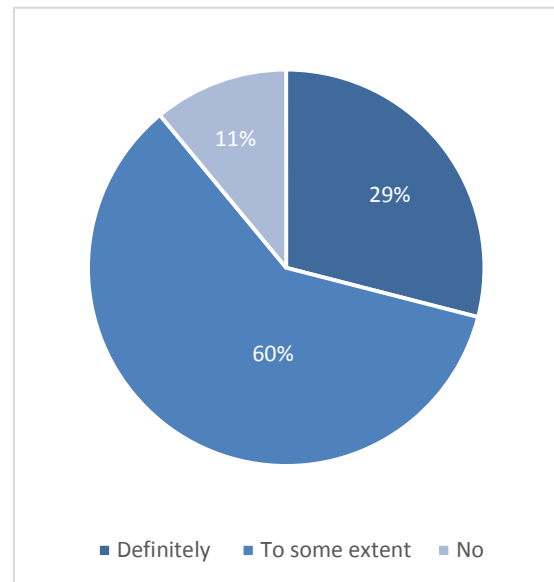
- 6.17 The research sought employers' views on their own knowledge of the local training offer. As shown in Figures 6.1 and 6.2, the feedback was generally positive: more than 80% of the employers said that, at least to some extent, they know where to find information about local training. More than 90% said that they know where to find information about online training.

**Figure 6.1: "I know where I can find out about training that is available locally"**



Source: York Consulting

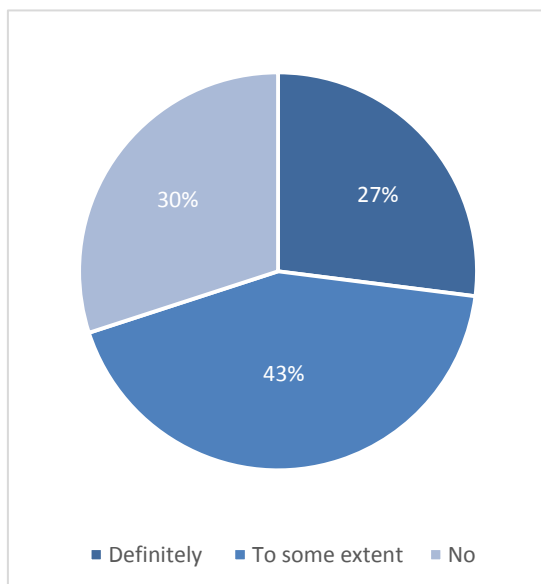
**Figure 6.2: "I know where I can find out about training that is available online"**



Source: York Consulting

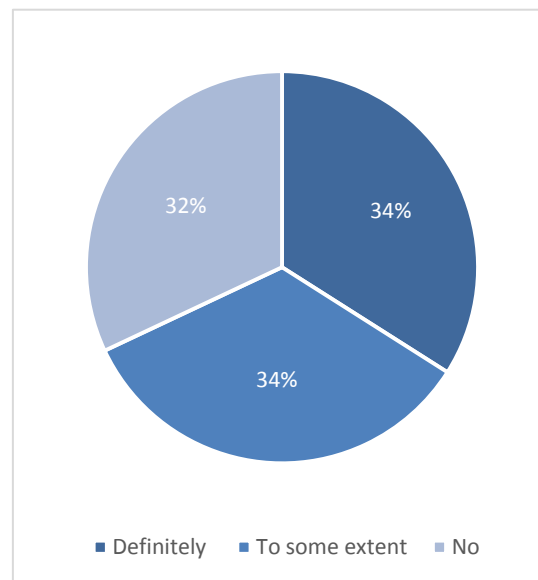
- 6.18 The feedback was more mixed – although still positive overall – on how easy the information about training is to understand and how well the employers understand the different qualification levels (Figures 6.3 and 6.4). The latter generated the highest proportion of 'no' responses (32%).

**Figure 6.3: “I find the information about training easy to understand”**



Source: York Consulting

**Figure 6.4: “I understand the different qualification levels (Level 1, Level 2 etc.)”**



Source: York Consulting

6.19 Employers’ awareness of the LLEP Business Gateway appears reasonably strong: fewer than one in five employers reported having no awareness of it.

### Future skills needs

6.20 Employers were given a list of skill-sets and asked to indicate whether each one would become more important to them over the next three years, whether it would become less important or whether it would stay the same. The headline messages from the employers’ feedback (Table 6.3) are that:

- Against 10 of the 14 different skill-sets, more than half the employers selected ‘more important’;
- More than two thirds of the employers selected ‘more important’ against management and supervisory and digital;
- Foreign language skills had the lowest proportion of employers selecting ‘more important’ (21%);
- Against none of the categories did more than one in ten employers say that the skill-set would become less important to them over the next three years.

**Table 6.3: The importance of different skill-sets over the next three years**

Skill-set	% employers contributing to the Skills for the Future study		
	More important	Stay the same	Less important
Management and supervisory	80%	17%	2%
Digital	70%	28%	3%
Communication	64%	33%	2%
Customer care	64%	36%	0%
Technical, practical or job specific	63%	32%	5%
Problem solving	62%	36%	2%
Marketing or sales	59%	37%	5%
Team working	59%	41%	0%
General IT	57%	43%	0%
IT professional	51%	41%	7%
Basic literacy	34%	63%	2%
Basic numeracy	34%	63%	2%
English language	34%	61%	5%
Foreign language	21%	70%	9%

Source: York Consulting. Rows not summing to 100% is due to rounding.

6.21 Within **communication skills**, no particular sub-sets emerged as being distinctly more or less important than any others. Broadly equal proportions of employers selected 'more important' against each of the following:

- Face-to-face communication;
- Telephone communication;
- Written communication;
- Communicating effectively with customers and/or suppliers;
- Communicating effectively with colleagues.

6.22 That said, there are some isolated exceptions. For example, employers in the hotel industry explained that far fewer hotel bookings are now made by telephone. As such, whilst telephone communication skills are still very important within that industry, they will not become *more important* over the coming years. Staff's knowledge and understanding of online booking systems, by contrast, is expected to increase in importance.

6.23 Further detail was also sought from employers on **digital skills**, the main findings from which are that:

- Social media skills/proficiency (e.g. Twitter, Facebook and LinkedIn) were identified by almost two thirds of the employers who said that digital skills would become more important to them;
- Basic digital literacy was selected by just over half the employers, as were the skills needed to offer products and services online;
- Just under half selected data manipulation and presentation skills (e.g. PowerPoint and Excel).

6.24 The final category from Table 6.3 against which employers were asked to provide further detail was **technical, practical and job specific skills**. Predictably perhaps, the responses here were very varied and were influenced by the industry sectors in which the employers operate and, within that, the sub-sector(s) in which they specialise.

6.25 In addition, some employers identified the importance of *combinations* of skills for their business going forward. For example, a company operating in business administration and support services emphasised the need for new staff to have strong digital skills combined with strong face-to-face interpersonal skills. A manufacturing company needs staff with expertise in new technologies combined with strong communication skills, while a financial services company needs staff that can multi-task across a wide range of IT platforms and processes, whilst adhering to productivity targets.

### Skills challenges

6.26 The responses were similarly mixed when employers were asked to identify the most significant skills challenge they expect to face over the next ten years. If anything, the main finding is that there is no single overriding challenge, nor is there a group or list of challenges that applies to even a significant minority of the sample.

6.27 That said, some issues or challenges were mentioned by more than one employer. These were typically national issues, such as the economic and labour market implications of Brexit, or sector specific issues, such as a shortage of young people choosing to pursue careers in the textiles sector. The challenge of keeping pace with technological change was also mentioned several times, as was the changing definition of jobs and roles as a consequence of increased automation.

## 7 HIGH VOLUME AND HARD-TO-FILL VACANCIES

### Introduction

- 7.1 Focussing on high volume and hard-to-fill vacancies, this chapter summarises the feedback gathered through one-to-one telephone consultations with eight recruitment agencies with a base in the LLEP area. Table 7.1 shows the sectors in which each of the agencies operate (most operate in more than one, hence the total summing to more than eight).

Table 7.1: Recruitment agency sector coverage	
Sector	No. of agencies
Financial and insurance	3
Professional, scientific and technical	3
Warehouse and distribution	3
Sales and customer service	2
Administration and support services	2
Engineering and manufacturing	2
Health and social care	1
Transport and logistics	1
Hospitality and catering	1
Other services	1

Source: York Consulting

### High volume vacancies

- 7.2 Table 7.2 shows the high(est) volume vacancies, by sector, as identified by the recruitment agency consultees (a blank cell denotes that the consultee(s) did not identify any high volume vacancies in that sector).
- 7.3 The common theme is that the high volume vacancies typically require relatively low skills/qualification levels. Views were mixed on how easy they are to fill, although common challenges are reported to include:
- Low salaries and above average working hours;
  - Night shifts and weekend working;
  - Changing workforce demographics, in particular migrant labour being less readily available than in recent years;
  - The propensity for people working in these jobs to move employer for very small salary increases.



**Table 7.2: High volume vacancies**

Sector	Examples of high volume vacancies
Financial and insurance	Finance support administrators Purchase sales ledger clerks
Warehouse and distribution	Warehouse operatives Warehouse loaders Warehouse pickers
Sales and customer service	Call centre staff Sales staff (general)
Administration and support services	Office administrators Personal assistants
Health and social care	Healthcare assistants Domiciliary care workers
Hospitality and catering	Various low-skilled, entry level roles
Transport and logistics	Various low-skilled, entry level roles
Professional, scientific and technical	-
Engineering and manufacturing	-
Other services	Cleaners

### Hard-to-fill vacancies

7.4 As shown in Table 7.3, the vacancies categorised by the recruitment agencies as hard-to-fill typically require higher skills/qualifications than the vacancies that are high volume. The main reasons provided for why these hard-to-fill vacancies exist are:

- Candidates lacking relevant industry experience;
- A shortage (in the view of the recruitment agencies) of younger workers entering certain sectors (e.g. engineering and manufacturing);
- Certain roles, such as LGV drivers, seemingly becoming less attractive career choices, particularly amongst younger people;
- Competition for skilled labour from other large urban centres, both locally (e.g. Nottingham) and nationally (e.g. London).

7.5 Note, however, that the table only lists those vacancies that were identified by the recruitment agencies in the sample. The absence from the table of any social care vacancies, for example, does not imply that the social care sector does not have any hard-to-fill vacancy issues within the LLEP area.

Table 7.3: Hard-to-fill vacancies	
Sector	Examples of hard-to-fill vacancies
Financial and insurance	Senior accountancy and finance roles
Professional, scientific and technical	Digital-tech professionals
Engineering and manufacturing	Skilled engineers Welders Mechanical labourers
Transport and logistics	LGV drivers

## 8 INSIGHTS FROM OTHER SURVEYS

### Introduction

- 8.1 This chapter draws on two secondary sources: the 2017 UK Employer Skills Survey (UKESS) and the 2017 Leicester and Leicestershire Business Survey. It presents headline findings from each that are relevant to this study, the intention being to augment the primary evidence gathered from employers for this study.

### Skills gaps

- 8.2 In the 2017 UKESS, 13% of businesses in the LLEP area reported having at least one skills gap (defined as staff lacking some of the skills needed to perform their job to the optimum level). This is the same percentage as employers nationally, although it is an improvement on 2015, when the equivalent figure in Leicester and Leicestershire was 16% and the equivalent figure nationally was 12%.
- 8.3 The profile of skills gaps across occupational groups is very similar in the LLEP area as it is nationally (Table 8.1).

Table 8.1: Skills gaps within the existing workforce (2017)		
	% of employers in L&L	% of employers nationally
Managers	2%	2%
Professionals	1%	1%
Associate professionals	1%	1%
Administrative/clerical Staff	2%	3%
Skilled trades	3%	2%
Caring, leisure and other services staff	1%	1%
Sales and customer service staff	3%	3%
Machine operatives	1%	1%
Elementary staff	2%	3%
<b>Any skills gaps</b>	<b>13%</b>	<b>13%</b>

Source: UK Employer Skills Survey 2017

- 8.4 Differences between the LLEP area and the country as a whole are more prevalent at sector level (Table 8.2). For example, in Leicester and Leicestershire, skills gaps are more common in Construction, Information and Communication and Primary Sector and Utilities than they are nationally. However, they are less common in most other sectors.

**Table 8.2: Skills gaps in Leicester and Leicestershire by sector (2017)**

**Table 8.2: Skills gaps in Leicester and Leicestershire by sector (2017)**

	<b>% of L&amp;L employers with skills gaps</b>	<b>% of employers nationally with skills gaps</b>
Education	18%	18%
Construction	17%	10%
Information and communications	17%	10%
Primary sector and utilities	16%	9%
Manufacturing	15%	18%
Wholesale and retail	15%	15%
Financial services	15%	15%
Hotels and restaurants	14%	19%
Transport and storage	12%	13%
Health and social work	9%	13%
Business services	7%	11%
Arts and other services	7%	12%
Public administration	*	20%

Source: UK Employer Skills Survey 2017

\* Insufficient data for this sector

- 8.5 Data from the 2017 Leicester and Leicestershire Business Survey suggests that communication is the areas in which skills gaps most commonly exist, although technical, practical or job specific skills and management and supervisory skills were also cited by more than a quarter of the sample (Table 8.3).

<b>Table 8.3: Types of skills gap</b>	
	<b>Leicester and Leicestershire Business Survey respondents (%)</b>
Communication skills	28%
Technical, practical or job specific skills	26%
Management and supervisory skills	26%
General IT user skills	22%
Marketing and sales skills	22%
Problem solving skills	20%
Customer care	19%
Team working skills	18%
IT professional skills	18%
Digital skills	17%
Basic literacy	10%
Basic numeracy	10%
Foreign language skills	8%
English language skills	7%
Other	1%

Source: Leicester and Leicestershire Business Survey 2017

- 8.6 In terms of why skills gaps exist, the 2017 UKESF shows the most common cause – both locally and nationally – to be that training is only partially completed (Table 8.4). This was cited by almost two-thirds of employers in the LLEP area with a skills gap and is the only category where the figure for the LLEP area is higher than the national figure. Against all other categories, the LLEP figure is lower, in some cases quite markedly, e.g. staff lacking motivation and staff performance not having improved following training.

**Table 8.4: Causes of skills gaps in Leicester and Leicestershire (2017)**

	<b>% of L&amp;L employers with skills gaps</b>	<b>% of employers nationally with skills gaps</b>
Their training is currently only partially completed	63%	62%
They are new to the role	52%	61%
They have not received the appropriate training	23%	25%
They have been on training, but their performance has not improved sufficiently	20%	26%
Unable to recruit staff with the required skills	20%	25%
Staff lack motivation	18%	26%
The introduction of new working practices	17%	22%
The introduction of new technology	15%	18%
The development of new products and services	12%	15%
Problems retaining staff	8%	13%
Lack of other skills e.g. communication, interpersonal	1%	3%
Lack of aptitude to do job/reached maximum potential	1%	1%
Non-work-related problems e.g. health or personal problems	1%	2%

Source: UK Employer Skills Survey 2017

## Training

- 8.7 The UKESS results show that in the 12 months prior to the 2017 survey, two-thirds (66%) of Leicester and Leicestershire employers had provided training for their staff<sup>24</sup>. This is the same as the national figure and higher than the East Midlands figure of 64%. It is also a 1% increase on the Leicester and Leicestershire figure of 65% reported in the 2015 UKESS. Amongst employers who had not provided any training, the overwhelming reason they gave was that all their staff are fully proficient or have no need for training.
- 8.8 The prevalence of training across different sectors varies significantly, influenced by a range of factors including regulation and the transiency of the workforce. As shown in Table 8.5, the proportion of LLEP area employers that had provided training for their staff in the 12 months prior to the 2017 UKESS ranges from 95% in Health and Social Work to 42% in Information and Communications. The results for the LLEP area are broadly similar to the national results in this regard, although there are some notable differences, particularly in Wholesale and Retail, Arts and Other Services and Information and Communications.

<sup>24</sup> Although important to keep in mind the different respondent populations and sample sizes of the two surveys, the 2017 Leicester and Leicestershire Business Survey gives a lower figure of 59%.

Table 8.5: Training activity by sector		
	% of employers in L&L	% employers nationally
Health and social work	95%	87%
Education	92%	91%
Financial services	76%	78%
Wholesale and retail	70%	61%
Manufacturing	68%	62%
Business services	65%	68%
Transport and storage	64%	61%
Construction	59%	59%
Arts and other services	58%	68%
Hotels and restaurants	56%	64%
Primary sector and utilities	53%	53%
Information and communications	42%	60%
Public administration	*	90%

Source: UK Employer Skills Survey 2017

\* Insufficient data for this sector

- 8.9 The 2017 Leicester and Leicestershire Business Survey sought employers' views on how easy or otherwise they had found it to arrange training. The results are very positive: more than three quarters (77%) of the employers that had arranged training in the preceding 12 months said it had either been 'very easy' or 'easy' to arrange. Only 6% felt that it had been either 'not at all easy' or 'not very easy'.
- 8.10 The 2017 Leicester and Leicestershire Business Survey also asked employers whether they were planning to train any of their staff over the next 12 months. More than half (57%) said they were, compared with 39% who said they were not and 4% who were unsure. As shown in Table 8.6, future training in technical, practical and job specific skills was cited most regularly.

Table 8.6: Areas of planned training	
	% of Leicester and Leicestershire Business Survey respondents who plan to train over the next 12 months
Technical, practical or job specific skills	33%
Customer care	14%
Marketing or sales skills	13%
Communication skills	12%
Digital skills	12%
Management and supervisory skills	12%
General IT user skills	11%
Team working skills	8%
Problem solving skills	7%
IT professional skills	6%
Foreign language skills	5%
Sales training incl. age related sales/products	4%
First aid	3%
Basic literacy	2%
Basic numeracy	2%
General training i.e. all areas	2%
Safeguarding	2%
English language skills	1%
Fire safety/marshal	1%
Forklift training	1%
General/regulation training incl. CPD	1%
Health and safety	1%
Dementia	0%
Food hygiene/safety incl. preparation	0%
Health and social care	0%
Machinery training incl. CNC	0%
Manufacturing skills	0%
Other	1%
None of these	3%
Not sure	3%

Source: Leicester and Leicestershire Business Survey 2017



## Vacancies

- 8.11 UKES data suggests that vacancies are (or were, in 2017) slightly less prevalent in Leicester and Leicestershire than they are nationally. Seventeen percent of the employers from the LLEP area who took part in the 2017 UKES said they had at least one vacancy, compared with 20% of employers nationally. The Leicester and Leicestershire figure has reduced from 20% in the 2015 UKES survey whilst the national figure is unchanged.
- 8.12 It is a similar situation with both skills shortage vacancies and hard-to-fill vacancies:
- **Skills shortage vacancies:** 4% of Leicester and Leicestershire employers reported having one or more skills shortage vacancy in the 2017 UKES, compared with 6% of employers nationally. However, skills shortage vacancies are more prevalent in the LLEP area than they are nationally in the following sectors: Information and Communication, Manufacturing and Financial Services.
  - **Hard-to-fill vacancies:** 6% of Leicester and Leicestershire employers reported having one or more hard-to-fill vacancy in the 2017 UKES, compared with 8% of employers nationally (the Leicester and Leicestershire figure has reduced since 2015 whilst the national figure is the same). The main cause of hard-to-fill vacancies in the LLEP area reported through the 2017 UKES was too few people being interested in doing the job (37%). This is notably higher than the 24% reported nationally. The second most regularly cited reason by Leicester and Leicestershire employers was having low numbers of applicants with the required skills. Thirty percent of Leicester and Leicestershire employers gave this reason, compared with 38% nationally.
- 8.13 Data from the 2017 Leicester and Leicestershire Business Survey shows that 28% of respondents had experienced difficulties in recruiting staff in the preceding 12 months, compared with 71% that had not. By far the most common reason given by employers in the Leicester and Leicestershire Business Survey was a low number of applicants with the required skills (Table 8.7).

**Table 8.7: Reasons for recruitment difficulties**

	<b>% of Leicester and Leicestershire Business Survey respondents that had experienced recruitment difficulties</b>
Low number of applicants with the required skills	45%
Not enough people interest in doing this type of job	18%
Low number of applicants generally	17%
Low number of applicants with the required attitude, motivation or personality	14%
Job entails shift work/unsociable hours	8%
Lack of work experience the company demands	8%
Poor terms and conditions (e.g. pay) offered for the post	8%
Remote location/poor public transport	8%
Lack of qualifications the company demands	4%
Too much competition for other employers	4%
Access to migrant labour and uncertainty over Brexit	2%
Seasonal work	0%
No particular reason	1%
Other	8%

Source: Leicester and Leicestershire Business Survey 2017

## 9 CONCLUSIONS

### Jobs growth and replacement demand

- 9.1 The outlook in terms of short-term jobs growth in the LLEP area appears buoyant. Net growth of 19,500 jobs is predicted between 2017 and 2023; an increase of +3.9%, taking total job numbers in the LLEP area to an estimated 519,000. This is a faster rate of growth than is forecast both regionally (+3.2%) and nationally (+2.9%) over the same period. In addition, developments at the East Midlands Gateway, the Enderby Logistics Point, Mere Lane at Bittesby and Glebe Farm at Lutterworth could see a further 6,700 new jobs created in the logistics sector over the period to 2023.
- 9.2 Logistics aside, jobs growth in the LLEP area is forecast to be driven by Accommodation and Food Services, Professional, Scientific and Technical Activities, Human Health and Social Work Activities, Wholesale Trade (excluding motor vehicle) and Manufacturing. At sub-industry level, the largest increase is expected in Food and Beverage Service Activities.
- 9.3 Few industries in the LLEP area are expected to experience a reduction in job numbers between 2017 and 2023. In those that are (e.g. Information and Communication, Real Estate Activities and Education), the reductions are forecast to be relatively small, both in absolute terms and as a proportion of current job numbers in those sectors.
- 9.4 In addition to new job creation, an estimated 146,150 job vacancies will need to be filled in the LLEP area between 2017 and 2023 as a result of replacement demand (retirements and mortality).

### Priority sectors

- 9.5 The LLEP's ten priority sectors currently account for half of all jobs in Leicester and Leicestershire. Collectively, a strong rate of jobs growth (+6.2%) is forecast across these sectors, although at sector level this ranges from +12% in Tourism and Hospitality (5,000 new jobs) and +10% in Textile Manufacturing (1,000 new jobs) to -1% in Advanced Manufacturing.

### Occupations

- 9.6 Employment in the LLEP area is forecast to increase in all of the main occupational groupings (i.e. one-digit SOC) between 2017 and 2023. Occupations with the largest forecast growth in absolute terms include Kitchen and Catering Assistants, Nurses, Care Workers and Elementary Storage Workers.

### T Levels

- 9.7 Job numbers in all 15 of the T Level routes are forecast to grow between 2017 and 2023. The combined rate of growth across the routes is +3.9% which is the same as the all-sector forecast for the LLEP area as a whole.

- 9.8 The largest increase in absolute terms is forecast in Sales, Marketing and Procurement (+2,360 jobs), while the largest proportionate increase is forecast in Catering and Hospitality (+6.3%). The smallest increase in absolute terms is forecast in Hair and Beauty (+80 jobs), while the smallest proportionate increase is forecast in Protective Services (+2.1%).

### **Work readiness: progress and improvements?**

- 9.9 The employers who took part in this study reported very few issues with the employability skills/attributes of recent applicants aged 25 and over. In fact their feedback seems to suggest that, IT skills aside, the older the applicant, the stronger their employability skills.
- 9.10 Views towards the work readiness skills of young people were less positive, with similar criticisms emerging as on the 2016 study (e.g. communication skills, problem-solving and resilience). However, overall the employers' views were slightly more positive than in 2016. They were also more likely to acknowledge that they (employers) have a role to play in developing the work readiness of young people. In both cases, this may be because of the concerted efforts made by the LLEP and its partners on this agenda over the past two years, although it may also be influenced by the size and composition of the employer sample. Either way, employers would welcome the ongoing prioritisation of work readiness skills within all educational settings.

### **Future skills needs**

- 9.11 The majority of employers that contributed to the study reported that most of the skill-sets covered by the research will become more important to them over the next three years. Management and supervisory skills, digital skills (especially social media and basic digital literacy) and communication skills (across most forms of communication) were selected by the highest proportions of employers, alongside which a wide array of job/industry specific skills were also mentioned. Only by exception do employers expect any of the skill-sets covered by the research to become less important to them over the next three years.
- 9.12 Brexit, technological change, automation and a shortage of young people choosing to work in specific sectors were the main longer-term skills challenges identified by employers. However, each of these was only mentioned by a minority of the sample. No issues or challenges were raised on a frequency that would constitute them being a majority view or an immediate call to action for the LLEP.

### **Recognising local need and circumstance**

- 9.13 Whilst this report has presented findings at the level of the LLEP area as a whole, it is important to acknowledge the differing labour market needs and characteristics of its districts. In many cases the most pronounced differences are between the city of Leicester and the rest of the county (although the districts in the county themselves differ as well). As responses to the skills challenges across the LLEP area are

implemented, it remains necessary to do so with an acknowledgement and understanding of these local variations in mind.

## APPENDIX A: SAMPLING

### Employers

The employers that contributed to Skills for the Future 2018-2030 did so through one of four routes:

- **Enterprise Advisor Steering Group workshop:** all members of the LLEP Enterprise Advisor Steering Group were invited to attend a consultation session, facilitated by the Skills for the Future consultants, in June 2018. There were no sampling criteria to this exercise beyond inviting all members of the group.
- **Consultation sessions hosted by a skills provider:** one post-16 provider based in the LLEP hosted an employer consultation session, facilitated by the Skills for the Future consultants, in June 2018<sup>25</sup>. The main sampling criterion was the provider already having an existing relationship with a named, senior figure within the organisations that they invited to attend.
- **Online survey:** the link to the Skills for the Future online survey was sent by email to employers in the LLEP's database of employer contacts (GDPR protocols were observed). The survey was also promoted through the LLEP's social media channels and via an advert in the Leicester Mercury newspaper.
- **One-to-one consultations:** representatives from large public sector employers (including local authorities and the health service) were consulted on a one-to-one basis by telephone. The employers were identified by the Skills for the Future steering group, following which the LLEP made contact with appropriate consultees – typically senior managers in HR or workforce development functions. The consultations were undertaken by the Skills for the Future consultants.

### Skills providers

The LLEP organised a skills provider workshop session in June 2018. All FE colleges and universities based in the LLEP area were invited to attend, as were a selection of large private sector and voluntary sector providers.

### Recruitment agencies

The LLEP approached 15 recruitment agencies with which they had some form of existing relationship or contact (that being the main sampling criterion) and asked if the Skills for the Future consultants could approach them with a view to arranging an interview. The consultants interviewed all of those who agreed to be contacted and who subsequently made themselves available for interview.

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<sup>25</sup> Other post-16 providers agreed to host a session but were unable to generate sufficient sign-up from employers to make it viable.

## APPENDIX B: PRIORITY SECTOR DEFINITIONS

**Table B.1: Health and Social Care Four-Digit SIC Codes**

8610	Hospital activities
8810	Social work activities without accommodation for the elderly and disabled
8899	Other social work activities without accommodation n.e.c.
8621	General medical practice activities
8690	Other human health activities
8730	Residential care activities for the elderly and disabled
8891	Child day-care activities
8790	Other residential care activities
8623	Dental practice activities
8710	Residential nursing care activities
8622	Specialist medical practice activities
8720	Residential care activities for learning disabilities, mental health and substance abuse

**Table B.2: Logistics and Distribution Four-Digit SIC Codes**

4611	Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods
4612	Agents involved in the sale of fuels, ores, metals and industrial chemicals
4613	Agents involved in the sale of timber and building materials
4614	Agents involved in the sale of machinery, industrial equipment, ships and aircraft
4615	Agents involved in the sale of furniture, household goods, hardware and ironmongery
4616	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
4617	Agents involved in the sale of food, beverages and tobacco
4618	Agents specialised in the sale of other particular products
4619	Agents involved in the sale of a variety of goods
4621	Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
4622	Wholesale of flowers and plants
4623	Wholesale of live animals
4624	Wholesale of hides, skins and leather
4631	Wholesale of fruit and vegetables
4632	Wholesale of meat and meat products
4633	Wholesale of dairy products, eggs and edible oils and fats
4634	Wholesale of beverages
4635	Wholesale of tobacco products
4636	Wholesale of sugar and chocolate and sugar confectionery
4637	Wholesale of coffee, tea, cocoa and spices
4638	Wholesale of other food, including fish, crustaceans and molluscs
4639	Non-specialised wholesale of food, beverages and tobacco

Table B.2: Logistics and Distribution Four-Digit SIC Codes

4641	Wholesale of textiles
4642	Wholesale of clothing and footwear
4643	Wholesale of electrical household appliances
4644	Wholesale of china and glassware and cleaning materials
4645	Wholesale of perfume and cosmetics
4646	Wholesale of pharmaceutical goods
4647	Wholesale of furniture, carpets and lighting equipment
4648	Wholesale of watches and jewellery
4649	Wholesale of other household goods
4651	Wholesale of computers, computer peripheral equipment and software
4652	Wholesale of electronic and telecommunications equipment and parts
4661	Wholesale of agricultural machinery, equipment and supplies
4662	Wholesale of machine tools
4663	Wholesale of mining, construction and civil engineering machinery
4664	Wholesale of machinery for the textile industry and of sewing and knitting machines
4665	Wholesale of office furniture
4666	Wholesale of other office machinery and equipment
4669	Wholesale of other machinery and equipment
4671	Wholesale of solid, liquid and gaseous fuels and related products
4672	Wholesale of metals and metal ores
4673	Wholesale of wood, construction materials and sanitary equipment
4674	Wholesale of hardware, plumbing and heating equipment and supplies
4675	Wholesale of chemical products
4676	Wholesale of other intermediate products
4677	Wholesale of waste and scrap
4690	Non-specialised wholesale trade
4920	Freight rail transport
4941	Freight transport by road
4942	Removal services
5020	Sea and coastal freight water transport
5040	Inland freight water transport
5121	Freight air transport
5210	Warehousing and storage
5222	Service activities incidental to water transportation
5224	Cargo handling
5229	Other transportation support activities
5310	Postal activities under universal service obligation
5320	Other postal and courier activities



**Table B.3: Professional and Financial Services Four-Digit SIC Codes**

6201	Computer programming activities
6202	Computer consultancy activities
6203	Computer facilities management activities
6209	Other information technology and computer service activities
6400	Financial service activities, except insurance and pension funding
6500	Insurance, reinsurance and pension funding, except compulsory social security
6600	Activities auxiliary to financial services and insurance activities
6910	Legal activities
6920	Accounting, bookkeeping and auditing activities; tax consultancy
7021	Public relations and communication activities
7022	Business and other management consultancy activities
7111	Architectural activities
7112	Engineering activities and related technical consultancy
7120	Technical testing and analysis
7311	Advertising agencies
7312	Media representation
7320	Market research and public opinion polling
7410	Specialised design activities
7420	Photographic activities
7430	Translation and interpretation activities
7490	Other professional, scientific and technical activities n.e.c.
6201	Computer programming activities

**Table B.4: Tourism and Hospitality Four-Digit SIC Codes**

5510	Hotels and similar accommodation
5520	Holiday and other short-stay accommodation
5530	Camping grounds, recreational vehicle parks and trailer parks
5590	Other accommodation
5610	Restaurants and mobile food service activities
5621	Event catering activities
5629	Other food service activities
5630	Beverage serving activities
7990	Other reservation service and related activities
9004	Operation of arts facilities
9102	Museum activities
9103	Operation of historical sites and buildings and similar visitor attractions
9104	Botanical and zoological gardens and nature reserve activities
9200	Gambling and betting activities
9311	Operation of sports facilities

**Table B.4: Tourism and Hospitality Four-Digit SIC Codes**

9321	Activities of amusement parks and theme parks
9329	Other amusement and recreation activities

**Table B.5: Advanced Manufacturing and Engineering Four-Digit SIC Codes**

2011	Manufacture of industrial gases
2012	Manufacture of dyes and pigments
2013	Manufacture of other inorganic basic chemicals
2014	Manufacture of other organic basic chemicals
2015	Manufacture of fertilisers and nitrogen compounds
2016	Manufacture of plastics in primary forms
2017	Manufacture of synthetic rubber in primary forms
2020	Manufacture of pesticides and other agrochemical products
2030	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
2041	Manufacture of soap and detergents, cleaning and polishing preparations
2042	Manufacture of perfumes and toilet preparations
2051	Manufacture of explosives
2052	Manufacture of glues
2053	Manufacture of essential oils
2059	Manufacture of other chemical products n.e.c.
2060	Manufacture of man-made fibres
2110	Manufacture of basic pharmaceutical products
2120	Manufacture of pharmaceutical preparations
2611	Manufacture of electronic components
2612	Manufacture of loaded electronic boards
2620	Manufacture of computers and peripheral equipment
2630	Manufacture of communication equipment
2640	Manufacture of consumer electronics
2651	Manufacture of instruments and appliances for measuring, testing and navigation
2652	Manufacture of watches and clocks
2660	Manufacture of irradiation, electromedical and electrotherapeutic equipment
2670	Manufacture of optical instruments and photographic equipment
2680	Manufacture of magnetic and optical media
2711	Manufacture of electric motors, generators and transformers
2712	Manufacture of electricity distribution and control apparatus
2720	Manufacture of batteries and accumulators
2731	Manufacture of fibre optic cables
2732	Manufacture of other electronic and electric wires and cables
2733	Manufacture of wiring devices
2740	Manufacture of electric lighting equipment

**Table B.5: Advanced Manufacturing and Engineering Four-Digit SIC Codes**

2751	Manufacture of electric domestic appliances
2752	Manufacture of non-electric domestic appliances
2790	Manufacture of other electrical equipment
2811	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
2812	Manufacture of fluid power equipment
2813	Manufacture of other pumps and compressors
2814	Manufacture of other taps and valves
2815	Manufacture of bearings, gears, gearing and driving elements
2821	Manufacture of ovens, furnaces and furnace burners
2822	Manufacture of lifting and handling equipment
2823	Manufacture of office machinery and equipment (except computers and peripheral equipment)
2824	Manufacture of power-driven hand tools
2825	Manufacture of non-domestic cooling and ventilation equipment
2829	Manufacture of other general-purpose machinery n.e.c.
2830	Manufacture of agricultural and forestry machinery
2841	Manufacture of metal forming machinery
2849	Manufacture of other machine tools
2891	Manufacture of machinery for metallurgy
2892	Manufacture of machinery for mining, quarrying and construction
2893	Manufacture of machinery for food, beverage and tobacco processing
2894	Manufacture of machinery for textile, apparel and leather production
2895	Manufacture of machinery for paper and paperboard production
2896	Manufacture of plastics and rubber machinery
2899	Manufacture of other special-purpose machinery n.e.c.
2910	Manufacture of motor vehicles
2920	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
2931	Manufacture of electrical and electronic equipment for motor vehicles
2932	Manufacture of other parts and accessories for motor vehicles
3020	Manufacture of railway locomotives and rolling stock
3030	Manufacture of air and spacecraft and related machinery
3040	Manufacture of military fighting vehicles
3091	Manufacture of motorcycles
3092	Manufacture of bicycles and invalid carriages
3099	Manufacture of other transport equipment n.e.c.
3311	Repair of fabricated metal products
3312	Repair of machinery
3313	Repair of electronic and optical equipment
3314	Repair of electrical equipment
3315	Repair and maintenance of ships and boats
3316	Repair and maintenance of aircraft and spacecraft

**Table B.5: Advanced Manufacturing and Engineering Four-Digit SIC Codes**

3317	Repair and maintenance of other transport equipment
3319	Repair of other equipment
3320	Installation of industrial machinery and equipment
7112	Engineering activities and related technical consultancy
7211	Research and experimental development on biotechnology
7219	Other research and experimental development on natural sciences and engineering
7220	Research and experimental development on social sciences and humanities

**Table B.6: Food and Drink Manufacturing Four-Digit SIC Codes**

1011	Processing and preserving of meat
1012	Processing and preserving of poultry meat
1013	Production of meat and poultry meat products
1020	Processing and preserving of fish, crustaceans and molluscs
1031	Processing and preserving of potatoes
1032	Manufacture of fruit and vegetable juice
1039	Other processing and preserving of fruit and vegetables
1041	Manufacture of oils and fats
1042	Manufacture of margarine and similar edible fats
1051	Operation of dairies and cheese making
1052	Manufacture of ice cream
1061	Manufacture of grain mill products
1062	Manufacture of starches and starch products
1071	Manufacture of bread; manufacture of fresh pastry goods and cakes
1072	Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
1073	Manufacture of macaroni, noodles, couscous and similar farinaceous products
1081	Manufacture of sugar
1082	Manufacture of cocoa, chocolate and sugar confectionery
1083	Processing of tea and coffee
1084	Manufacture of condiments and seasonings
1085	Manufacture of prepared meals and dishes
1086	Manufacture of homogenised food preparations and dietetic food
1089	Manufacture of other food products n.e.c.
1091	Manufacture of prepared feeds for farm animals
1092	Manufacture of prepared pet foods
1101	Distilling, rectifying and blending of spirits
1102	Manufacture of wine from grape
1103	Manufacture of cider and other fruit wines
1104	Manufacture of other non-distilled fermented beverages
1105	Manufacture of beer

**Table B.6: Food and Drink Manufacturing Four-Digit SIC Codes**

1106	Manufacture of malt
1107	Manufacture of soft drinks; production of mineral waters and other bottled waters

**Table B.7: Creative Industries Four-Digit SIC Codes**

3212	Manufacture of jewellery and related articles
5811	Book publishing
5812	Publishing of directories and mailing lists
5813	Publishing of newspapers
5814	Publishing of journals and periodicals
5819	Other publishing activities
5821	Publishing of computer games
5829	Other software publishing
5911	Motion picture, video and television programme production activities
5912	Motion picture, video and television programme post-production activities
5913	Motion picture, video and television programme distribution activities
5914	Motion picture projection activities
5920	Sound recording and music publishing activities
6010	Radio broadcasting
6020	Television programming and broadcasting activities
6201	Computer programming activities
6202	Computer consultancy activities
7021	Public relations and communication activities
7111	Architectural activities
7311	Advertising agencies
7312	Media representation
7410	Specialised design activities
7420	Photographic activities
7430	Translation and interpretation activities
8552	Cultural education
9001	Performing arts
9002	Support activities to performing arts
9003	Artistic creation
9004	Operation of arts facilities
9101	Library and archive activities
9102	Museum activities

**Table B.8: Textile Manufacturing Four-Digit SIC Codes**

**Table B.8: Textile Manufacturing Four-Digit SIC Codes**

1310	Preparation and spinning of textile fibres
1320	Weaving of textiles
1330	Finishing of textiles
1391	Manufacture of knitted and crocheted fabrics
1392	Manufacture of made-up textile articles, except apparel
1393	Manufacture of carpets and rugs
1394	Manufacture of cordage, rope, twine and netting
1395	Manufacture of non-wovens and articles made from non-wovens, except apparel
1396	Manufacture of other technical and industrial textiles
1399	Manufacture of other textiles n.e.c.
1411	Manufacture of leather clothes
1412	Manufacture of workwear
1413	Manufacture of other outerwear
1414	Manufacture of underwear
1419	Manufacture of other wearing apparel and accessories
1420	Manufacture of articles of fur
1431	Manufacture of knitted and crocheted hosiery
1439	Manufacture of other knitted and crocheted apparel
1511	Tanning and dressing of leather; dressing and dyeing of fur
1512	Manufacture of luggage, handbags and the like, saddlery and harness
1520	Manufacture of footwear
2060	Manufacture of man-made fibres

**Table B.9: Sport and Physical Activity Four-Digit SIC Codes**

3230	Manufacture of sports goods
4764	Retail sale of sporting equipment in specialised stores
6020	Television programming and broadcasting activities
7721	Renting and leasing of recreational and sports goods
9200	Gambling and betting activities
9311	Operation of sports facilities
9312	Activities of sport clubs
9313	Fitness facilities
9319	Other sports activities

**Table B.10: Energy Four-Digit SIC Codes**

1920	Manufacture of refined petroleum products
2011	Manufacture of industrial gases
2446	Processing of nuclear fuel
2521	Manufacture of central heating radiators and boilers
2712	Manufacture of electricity distribution and control apparatus
2720	Manufacture of batteries and accumulators
2740	Manufacture of electric lighting equipment
2825	Manufacture of non-domestic cooling and ventilation equipment
3511	Production of electricity
3512	Transmission of electricity
3513	Distribution of electricity
3521	Manufacture of gas
3522	Distribution of gaseous fuels through mains
3530	Steam and air conditioning supply
4222	Construction of utility projects for electricity and telecommunications