

Annex A.1: Sector profiles

Contents

Advanced Manufacturing & Engineering.....	2
Aerospace, Space & Satellite	4
Construction.....	6
Creative	9
Health & Social care	12
Hospitality & Tourism.....	15
IT.....	17
Land based (including Animal health and welfare)	20
Professional Services.....	22

Profile: Advanced Manufacturing & Engineering

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

59,669 Jobs (2019) 21% above National average	-14.7% % Change (2019 - 2022) Nation: -5.5%	5,748 businesses (2021) 78% have 1-4 employees	£43.5k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Civil engineers
2. Engineering technicians
3. Mechanical engineers
4. Engineering professionals n.e.c.
5. Electrical engineers

TOP SOFT SKILLS:

1. Communications
2. Management
3. Customer service
4. Planning
5. Detail oriented

TOP SPECIALISED SKILLS:

1. Mechanical engineering
2. Machinery
3. Auditing
4. Engineering design process
5. Electrical engineering

JOB POSTINGS REGIONAL BREAKDOWN:

1. Basingstoke and Deane
2. Guildford
3. Rushmoor
4. Test Valley
5. Woking

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

With a high concentration of businesses in for example the Precision Technology cluster¹, this sector makes a strong contribution to the area's productivity through large numbers of high value jobs such as *Production managers and directors in manufacturing* and *Design and development engineers*. Although average wages are high, there is evidence of a decline in the number of jobs in a sector with predominantly (78%) micro businesses with less than five employees.

The Government's Industrial Decarbonisation Strategy² highlights Manufacturing as a key industry in working towards net zero. This activity will require skills and innovation – both of which the LSIP area can support. In 2022, Manufacturing accounted for about 46,000 jobs – roughly 5% of employment in the LSIP area. Most of these jobs were in Test Valley, Basingstoke & Deane, and East Hampshire.

There is strong alignment between this sector and the green growth sectors of Industrial Decarbonisation and Power identified in the Green Skills demand report³. Manufacturing

¹ "Skills and Labour Market Analysis", (2020), <https://enterprisem3.org.uk/sites/default/files/2020-02/EM3%20Skills%20and%20Labour%20Market%20Analysis%20%28FINAL%29_0.pdf>, p. 13

² "Industrial Decarbonisation Strategy, March 2021", UK Government, <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/970229/Industrial_Decarbonisation_Strategy_March_2021.pdf>

³ "Annex A.2: Green skills demand report", p. 4

and engineering roles occupy eight of the top 50 green occupations, both currently and projecting forward to 2030, with the top jobs being civil engineers, production managers/directors manufacturing, electrical and mechanical engineers⁴. It is critical to ensure there is sufficient green content in engineering courses run by local providers, or for new courses or modules to be found.

In the LSIP employer survey⁵, respondents cited gaps in particular engineering job roles including: *Aviation, Electrical, Mechanical, Service and Software Engineers; Fitters and Welders. Machine skills* were also cited as a particular skill in demand. Other feedback includes challenges of finding candidates with the right technical skills and / or basic understanding of key engineering skills and machinery at a time when the workforce is getting older, retiring and therefore, there is a 'brain drain' concern.

In terms of local provision, in 2021-22, there were 1,357 achievements (7.2% of all achievements) in *Engineering and manufacturing technologies* sector subject area – mostly at level 3. Apprenticeship starts in this subject area accounted for less than 10%; a lot lower than the national proportion⁶.

CASE STUDY: An engineering business, shaped around solving problems for energy, defence and science, **Sonardyne**⁷, based in Yateley in Hampshire have been working closely with **HSDC** since 2011 as part of their talent strategy. The business funded the high-spec Sonardyne Engineering Centre at the Alton campus and each year, students compete for work placement and apprenticeship opportunities to kick off their careers in offshore energy, maritime defence and ocean science.

⁴ "Annex A.2: Green skills demand report", pp. 18-19

⁵ "Annex B.1: Employer Survey Report"

⁶ "Annex A: Local Strategic Context", p.40

⁷ Sonardyne, <<https://www.sonardyne.com>>

Profile: Aerospace, Space & Satellite

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

5,863 Jobs (2019) 18% below National average	+3.8% % Change (2019 - 2022) Nation: -10.4%	376 businesses (2021) 77% have 1-4 employees	£43.3k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Programmers and software development professionals
2. IT business analysts, architects and systems designers
3. IT user support technicians
4. Engineering technicians
5. Information technology and telecommunications professionals n.e.c.

TOP SPECIALISED SKILLS:

1. Agile Methodology
2. SQL (Programming Language)
3. Microsoft Azure
4. Automation
5. C# (Programming Language)

TOP SOFT SKILLS:

1. Communications
2. Management
3. Customer service
4. Problem solving
5. Planning

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Rushmoor
4. Woking
5. Reigate and Banstead

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

Space South Central is the largest regional space cluster in the UK, which covers the LSIP area (as well as the Solent LSIP area). It is estimated there are approximately 2,392 specifically space-focused employees across 111 companies.⁸ In a 2022 report about the industry, 46% cited 'Recruiting staff' and 38% cited a general shortage of skills as barriers to growth. The LSIP roundtable on Aerospace⁹ also cited an ageing workforce as a concern – particularly high-skilled, practical engineers.

In the LSIP area, employment in the Aerospace, Space & Satellite sector tends to be concentrated in Aerospace – including Aviation – in roles such as *Air traffic controllers*, *Security guards and related occupations* and *Aircraft pilots*. A focus on Space & Satellite highlights roles such as *Engineering technicians*, *Production managers and directors in manufacturing* and *Mechanical engineers*.

⁸ Figures taken from a 2023 Space Skills Alliance report

⁹ "Annex B.2: Employer Engagement Summary Reports", p. 22

A Space Skills Alliance report¹⁰ identifies the demand for skills for the space sector across the Space South Central region (which takes in the Solent LSIP area). Typically, these centre around *engineering, software, and business* with many non-space specific roles falling into commercial operations¹¹.

This was reflected in the Aerospace roundtable with comments captured about use of Sales Engineers (who can understand the customer's need and translate to colleagues to develop a solution) as well as support to grow and scale-up businesses. The roundtable also reported demand over the next three years at least to maintain pace with technological advances such as cloud computing, machine learning and cyber security to remain relevant, agile and competitive.

The Space Skills Alliance report suggests provision of education and training across the South is mostly good, with a diverse range of provision across all levels of education – including some unique, short course offerings. However, there are some weaknesses around aero/mechanical engineering and environmental science due to declining student numbers and difficulties in delivering viable technical courses. The Aerospace roundtable captured demand for a level 2-3 Apprenticeship in Engineering & Manufacturing alongside needs for pathways to various engineering roles such as Systems, Software, Sub-systems, Radiation, Thermal and 'older' technologies often found in spacecraft.

In terms of local provision, it's difficult to isolate specific subject areas and there is some evidence of career pathways via universities and apprenticeships¹². As mentioned in the previous sector, Apprenticeship starts in this subject area accounted for less than 10%; a lot lower than the national proportion¹³ indicating there could be some work to do here.

CASE STUDY: As the Aerospace sector accelerates its transition to cleaner, greener technologies to meet the government's net zero commitments, its future global success at least partially depends on the **Jet Zero strategy**¹⁴ to achieve net zero aviation by 2050.

Linked to this, Enterprise M3 LEP have created the **Jet Zero Cluster** and commissioned a detailed analysis of businesses, activity, skills strengths and challenges across the local area to help inform the work of the Cluster. Newly formed, the Cluster has representatives from the aviation industry, academia, trade associations and government bodies and forms a vital part of the LEP's vision for a low carbon high growth economy.

¹⁰ Figures taken from a 2023 Space Skills Alliance report

¹¹ Figures taken from a 2023 Space Skills Alliance report

¹² "Entry routes to a career in aerospace, Careers in Aerospace",
<<https://www.careersinaerospace.com/news/entry-routes-to-a-career-in-aerospace/>>

¹³ "Annex A: Local Strategic Context"

¹⁴ "Jet Zero Strategy: delivering net zero aviation by 2050", UK Government,
<<https://www.gov.uk/government/publications/jet-zero-strategy-delivering-net-zero-aviation-by-2050>>

Profile: Construction

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

52,865 Jobs (2019) 17% above National average	+6.0% % Change (2019 - 2022) Nation: +1.9%	13,834 businesses (2021) 86% have 1-4 employees	£34.7k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Elementary Construction Occupations
2. Civil engineers
3. Quantity Surveyors
4. Plumbers and Heating and Ventilating Engineers
5. Production Managers and Directors in Construction

TOP SPECIALISED SKILLS:

1. Construction
2. Carpentry
3. Painting
4. Civil engineering
5. Plumbing

TOP SOFT SKILLS:

1. Management
2. Communications
3. Planning
4. Customer service
5. Leadership

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Winchester
4. Reigate and Banstead
5. Rushmoor

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

The UK construction industry contributes 8% of economic output and employs 2.7m people but, following the pandemic, has faced a deepening skills crisis highlighted by high job postings activity and delayed construction projects due to reduced labour¹⁵.

The sector employees a significant number of people (17% above the national average) and it is dominated by a high percentage of SMEs (99.96%). The LSIP focus group highlighted the capacity challenges SMEs face in being able to engage with the skills system and requiring additional support from colleges. Another key feature of the sector is the importance of supply chains and contractors linked to larger “anchor” companies, which presents opportunities for colleges to develop engagement with the sector through. The employer survey highlighted a key challenge in recruiting to roles as being candidates having the right employability skills (41% indicated this was a problem)¹⁶, with “motivation” featuring in several responses. Some of the main occupational gaps included: Site mangers, quantity surveyors, fitters, roofers, and dry-liners¹⁷.

¹⁵ “Driving construction skills, growth, and jobs through Local Skills Improvement Plans (LSIPs)”, CITB, <<https://www.citb.co.uk/media/v3ybdhft/citb-lsips-guidance-january-2023v2.pdf>>

¹⁶ “Annex B.1: Employer Survey Report”, p. 2

¹⁷ “Annex B.2: Employer Engagement Summary Reports”, p.14

Construction is also a priority sector when it comes to the green economy in the LSIP area. The Green Skills report highlights construction roles occupying six of the top 50 green occupations, both currently and projecting forward to 2030, with the top jobs being *Electricians, Production and construction managers* and *Plumbers*¹⁸.

For example, retrofitting buildings to meet government energy efficiency targets requires an additional 350,000 skilled construction workers in Britain by 2028¹⁹. Construction companies in the area have reported a need to reskill and upskill the existing workforce to make existing and new buildings more energy efficient and low carbon. Examples of skills required include *retrofitting project coordination* and *heat pump and solar panel installation*²⁰ but also Electricians with electrotechnical skills for *solar power, energy storage systems* and *electric vehicle charging*²¹. This is a particular challenge in the LSIP area in which the current Electrician workforce is very low with a ratio of 1:746 in the general population – placing our area 38th out of 38 LSIP areas²², which is potentially exacerbated by evidence of very low progression rates from non-apprentice learners into electrician apprenticeships ranging from 0% to just 14%²³.

With both a high resident population and concentration of businesses in the area, there is a need but until there is increased consumer demand for retrofitting, employers – most of which are SMEs – are reluctant to invest in training²⁴. And in terms of the UK talent pipeline, only 40% of further education learners studying construction courses progress into the industry²⁵, reflecting the reported lack of careers guidance which also impacts on the challenge of diversity in the workforce²⁶.

In terms of local provision, in 2021-22, there were 970 achievements (5.2% of all achievements) in *Construction, planning and the built environment* sector subject area – mostly at level 2. Apprenticeship starts in this subject area accounted for less than 5%; less than the national proportion²⁷.

CASE STUDY: The ESF-funded **Technical Construction Skills for the Unemployed project**²⁸ led by Hampshire County Council offers training and support for young people across Hampshire and Surrey who are looking to move into the Construction industry. Part of this training includes skills for sustainable construction; crucial for an industry trying to adapt

¹⁸ “Annex A.2: Green skills demand report”, pp. 18-19

¹⁹ “Building Skills for Net Zero”, CITB (2021), <<https://www.citb.co.uk/about-citb/construction-industry-research-reports/search-our-construction-industry-research-reports/building-skills-for-net-zero/>>

²⁰ Comments from employers at EM3 Skills Advisory Panel, January 2021 and Retrofitting Roundtable, September 2021.

²¹ “Leading the Charge”, ECA, <<https://leadingthecharge.eca.co.uk>>

²² ECA personal communication following LSIP roundtable.

²³ ECA personal communication following LSIP roundtable

²⁴ “Annex B.2: Employer Engagement Summary Reports”, p. 35

²⁵ “Written evidence submitted by the Construction Industry Training Board”, <[https://committees.parliament.uk/writtenevidence/42880/pdf/#:~:text=Our%20research%20Learning%20to%20Earning,16%25\)%%20starting%20construction%20apprenticeships](https://committees.parliament.uk/writtenevidence/42880/pdf/#:~:text=Our%20research%20Learning%20to%20Earning,16%25)%%20starting%20construction%20apprenticeships)> , p. 1

²⁶ “Annex B.2: Employer Engagement Summary Reports”, p. 14

²⁷ “Annex A: Local Strategic Context”

²⁸ Technical Construction Skills for the Unemployed project: <<https://www.hants.gov.uk/educationandlearning/hampshirefutures/employmenthub/construction-training>>

to become low carbon.

To date, nearly 900 individuals have participated in the project, 470 of whom have qualified so far with at least their CSCS card. This number includes 44 care leavers, 20 carers, 34 homeless people and over 158 ex-offenders. Over 50% of those that qualified have secured employment.

Profile: Creative

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

59,243 Jobs (2019) 41% above National average	+2.5% % Change (2019 - 2022) Nation: +1.8%	14,997 businesses (2021) 90% have 1-4 employees	£45.1k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Programmers and software development professionals
2. Marketing and sales directors
3. IT business analysts, architects and systems designers
4. Marketing associate professionals
5. Web design and development professionals

TOP SOFT SKILLS:

1. Communications
2. Management
3. Sales
4. Planning
5. Customer service

TOP SPECIALISED SKILLS:

1. Marketing
2. Agile methodology
3. Javascript (Programming language)
4. SQL (Programming language)
5. C# (Programming language)

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Rushmoor
4. Reigate and Banstead
5. Woking

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

The Creative industries sector contributed £109bn to the UK economy in 2021 – about 5.6%. This sector saw a faster recovery in employment after the pandemic with 3m jobs in 2021, representing 7% of all filled jobs in the UK economy. This sector has been identified as one of the four key sectors in the Plan for Growth²⁹ to encourage recovery and a vision for the sector will address creative skills and other workforce issues, the impact of artificial intelligence and ensure the sector is accessible to people from all backgrounds³⁰. As noted at the Creative focus group session, entry tends to be 'largely degree level and above so the cost of training and risk, therefore, falls on entrants to the sector rather than employers which make creative careers inaccessible to a wide range of people³¹.

For the LSIP area, the Createch sector (i.e. businesses harnessing the interaction of creativity and technology³²) is of particular interest due to the Digital clustering in the area alongside

²⁹ "Plan for Growth", UK Government, <<https://www.gov.uk/government/publications/plan-for-growth--5>>

³⁰ "Arts and creative industries: The case for a strategy", UK Parliament, <<https://lordslibrary.parliament.uk/arts-and-creative-industries-the-case-for-a-strategy/>>

³¹ "Annex B.2: Employer Engagement Summary Reports", p. 16

³² Cited in: "Createch in the UK: Sustainability Policy Linkages & Company Activity", UCA, <https://cfsd.org.uk/wp-content/uploads/2022/07/CT_Published_July-2022.pdf>

recent growth in (e.g.) the gaming and immersive technologies sector which accounted for over 1,000 jobs in 2020³³ – mainly in the production and publishing of gaming software which have seen high growth and concentration of jobs in/around Guildford.

The skills in these sectors are also likely to see increasing demand due to the recent growth of other creative industries in the area. For example, film and TV production with the announcements of both Amazon Prime Video and Netflix expanding their production facilities at the Shepperton Studios in Surrey³⁴.

Work from Nesta³⁵ using an analysis of job adverts for creative occupations, clustered thousands of skills into five, key skill clusters: *Support skills*, *Creating & design skills*, *Tech skills*, *Marketing skills* and *Teaching skills*. A presentation from Screen South as part of the LSIP project, identified related shortages such as Technical, Lighting and Production (Support); Storyboard artists, Animators and Prop creators (Creating & design) and VFX, Unreal and Coders (Tech).

With a high percentage of the creative workforce being freelance (around a third compared to 16% across the UK generally³⁶), they also need accessible CPD opportunities such as leadership, project management, funding applications and financial management.

With reference to local provision, 15% of vocational achievements in FE in 2021-22 were in *Arts, Media and Publishing + Information and Communication Technology* subject areas³⁷ - second only to *Health, Public Services and care*.

Although apprenticeship starts in *Arts, Media and Publishing* in 2020-21 were low, there was a higher proportion starting on *Information and Communication Technology* apprenticeships than in England. Creative & Cultural Skills have also identified apprenticeships as vital to diversify the creative workforce and sustain skills within the sector³⁸ and with organisations such as intogames³⁹ supporting apprenticeships, this should help attract and retain a more domestic workforce – something the games industry would like to see more of.

CASE STUDY: UCA has recently created the **Creative Industries Network for Surrey**⁴⁰ – an open voluntary network and working group that brings together a dynamic range of diverse practitioners and businesses from across the creative sector to share common

³³ “Skills and Labour Market Analysis”, *EM3*, <<https://enterprisem3.org.uk/hub/skills-businesses>>

³⁴ Amazon’s Prime Video signs record deal to film in Surrey studios for next decade”, *Guardian*, <<https://www.theguardian.com/media/2022/feb/09/amazon-signs-record-deal-to-film-in-surrey-studios-for-next-decade>>

³⁵ A closer look at Creatives, *Nesta*, <<https://data-viz.nesta.org.uk/creative-skills/index.html>>

³⁶ “DCMS Sector Economic Estimates: Employment Oct 2019-Sep202”, *UK Government*, <<https://www.gov.uk/government/statistics/dcms-sector-economic-estimates-employment-oct-2019-sep-2020>>

³⁷ “Annex A: Local Strategic Context”

³⁸ “Apprenticeships, Creative & Cultural Skills”, <<https://ccskills.org.uk/what-we-do/supporting-our-sector/apprenticeships/>>

³⁹ “Everything you need to know about games apprenticeships we’re supporting”, *Intogames*, <<https://intogames.org/news/apprenticeships>>

⁴⁰ “Creative Industries Network”, *UCA*, <<https://www.uca.ac.uk/creative-industries-network/>>

challenges, opportunities and best practices. The Creative Industries Network will support and become a collective voice for local creative industry businesses, development agencies and regional local authorities.

Profile: Health & Social care

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

120,068 Jobs (2019) 2% below National average	-0.6% % Change (2019 - 2022) Nation: +6.1%	5,011 businesses (2021) 46% have 1-4 employees	£25.5k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Care workers and home carers
2. Nurses
3. Nursing auxiliaries and assistants
4. Medical practitioners
5. Nursery nurses and assistants

TOP SPECIALISED SKILLS:

1. Nursing
2. Personal care
3. Mental health
4. Auditing
5. Midwifery

TOP SOFT SKILLS:

1. Communications
2. Management
3. Teaching
4. Leadership
5. Customer service

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Reigate and Banstead
4. Epsom and Ewell
5. Winchester

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

There are significant challenges with the recruitment and retention of people working in social care. Among online job postings for the LSIP area between January 2020 and November 2022⁴¹, *Care Workers and Home Carers* appeared as the top occupation in demand.

In adult social care, although the starter rate was 30.8% in 2021-22, turnover was 29% resulting in fewer people replacing those who are leaving⁴². Local authorities have seen demand for social care support increasing; the numbers of staff directly employed by them decreasing and their vacancies continuing to rise⁴³.

⁴¹ "Annex A: Local Strategic Context", p.27

⁴² "The state of the adult social care sector and workforce in England", *Skills for Care*, <<https://www.skillsforcare.org.uk/Adult-Social-Care-Workforce-Data/Workforce-intelligence/publications/national-information/The-state-of-the-adult-social-care-sector-and-workforce-in-England.aspx>>

⁴³ "Adult Social Care Statistics in England: An Overview", *NHS Digital*, <<https://digital.nhs.uk/data-and-information/publications/statistical/adult-social-care-statistics-in-england/an-overview>>

Low pay also remains an issue⁴⁴ not just for the cost of living, but especially for those in domiciliary care where travel time and fuel costs erode actual take home pay to below the statutory minimum wage.

Education providers report an increase in enquiries and applications for Health and Social Care courses⁴⁵. The sector would welcome these individuals but highlights competition from healthcare training pathways (e.g. nursing). Employers also cite noticeable declines in candidates from Eastern Europe post Brexit; struggling to attract older and experienced candidates such as parents wanting to return to the paid workforce; the requirement to drive a car (for domiciliary care roles) and competition with other care providers in the sector⁴⁶.

The sector would welcome a rumoured boost to funding for adult care apprenticeships⁴⁷, but also cites difficulty in releasing staff for training⁴⁸. Although there were high numbers of apprenticeship starts in the area in 2020-21⁴⁹, it's not possible to isolate those linked specifically to social care. However, national data shows starts on the adult social care apprenticeship in 2021/22 was 15% lower than in 2020/21 in contrast to a 9% rise across all apprenticeships⁵⁰.

Alongside the need for Nurses, as one of the biggest employers in the world⁵¹ and with over 350 different careers⁵², the NHS is committed to digitise the majority of health and social care services by 2025⁵³. However, there is recognition that many Trusts are far from this goal, and they can struggle to offer competitive salaries for key roles compared to the private sector⁵⁴.

To help address skills challenges, the NHS have created 'job carve' opportunities⁵⁵ – a technique used to create a role that best matches the skills of the employee, such as someone with a disability. Other feedback from local employers in the health and social care sector include requests for a range of skills from basic admin and technical to leadership and management⁵⁶.

⁴⁴ "What happens after the clapping finishes?", *Resolution Foundation*, <<https://www.resolutionfoundation.org/app/uploads/2020/04/Care-workers-spotlight.pdf>>

⁴⁵ Comment from education provider at EM3 Skills Advisory Panel, November 2021.

⁴⁶ Comment from Social care employer and training providers at EM3 Skills Advisory Panel, November 2021.

⁴⁷ "Double cash bump for care apprenticeships?", *FE Week*, <<https://feweek.co.uk/care-apprenticeships-could-be-in-line-for-bigger-funding-boost-and-more-from-seg-conference/>>

⁴⁸ Comment from Social care employer at EM3 Skills Advisory Panel, November 2021.

⁴⁹ "Annex A: Local Strategic Context"

⁵⁰ "Apprenticeships", *Skills for Care*, <<https://www.skillsforcare.org.uk/Adult-Social-Care-Workforce-Data/Workforce-intelligence/publications/Topics/Apprenticeships.aspx>>

⁵¹ "The NHS workforce in numbers", *Nuffield Trust*, <<https://www.nuffieldtrust.org.uk/resource/the-nhs-workforce-in-numbers>>

⁵² "Explore roles", *NHS*, <<https://www.healthcareers.nhs.uk/explore-roles/explore-roles>>

⁵³ "Our strategy to digitise, connect and transform", *NHS England*, <<https://transform.england.nhs.uk/digitise-connect-transform/our-strategy-to-digitise-connect-and-transform/>>

⁵⁴ Comment from NHS skills expert at Apprenticeship Conference, Ascot Racecourse, 8 February 2023.

⁵⁵ "Ways into Work", *Southern Health NHS Foundation Trust*, <<https://www.southernhealth.nhs.uk/work-us/ways-work>>

⁵⁶ "Annex B.2: Employer Engagement Summary Reports", p. 27

NHS trusts have been swift to create industrial placement opportunities for local T Level provision (e.g. with Farnborough College of Technology and Guildford College) but they also welcome additional support to make these and other forms of work experience work better – particularly to ensure learners get valuable experiences⁵⁷. It will be interesting to see how these T Level figures impact on the vocational FE achievement statistics for the Health, public services and care sector subject area which continues to dominate – particularly at level 2⁵⁸.

CASE STUDY: Students and healthcare professionals are benefiting from using the latest high-tech immersive technology to learn how to handle real-life health emergencies, thanks to the **Care Skills Training Centre** at Activate Learning, Guildford College campus⁵⁹.

The facility was designed in partnership with Royal Surrey County Hospital NHS Foundation Trust, Health Education England and Skills for Care. The Centre has attracted interest from local care providers such as Home Counties Carers who are now offering work experience and job opportunities to current health and social care students.

⁵⁷ “Annex B.2: Employer Engagement Summary Reports”, p. 27

⁵⁸ “Annex A: Local Strategic Context”

⁵⁹ “New state-of-the-art Care Skills Training Centre”, *Activate Learning*,
<https://guildford.activatelearning.ac.uk/courses/career-pathways/health-and-social-care-clinical_trashed/care-skills-training-centre/>

Profile: Hospitality & Tourism

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

96,559 Jobs (2019) 0% above National average	-3.9% % Change (2019 - 2022) Nation: -2.5%	8,377 businesses (2021) 50% have 1-4 employees	£17.6k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Chefs
2. Kitchen and catering assistants
3. Waiters and waitresses
4. Bar staff
5. Catering and bar managers

TOP SPECIALISED SKILLS:

1. Restaurant operation
2. Cooking
3. Food safety and sanitation
4. Food preparation
5. Stock control

TOP SOFT SKILLS:

1. Customer service
2. Communications
3. Management
4. Cleanliness
5. Enthusiasm

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Elmbridge
3. Basingstoke and Deane
4. Winchester
5. Waverley

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

Since 2010, Tourism has been the fastest growing sector in the UK in employment terms; the industry is forecast to be worth over £257 billion to Britain, supporting almost 3.8m jobs by 2025⁶⁰. However, despite tourism currently being one of the strongest sources of employment in the UK economy, its productivity is strikingly low compared to other countries and other sectors of the UK economy⁶¹. One reason for this relates to the workforce which tends to be transient, temporary, low skilled, young and migrant. Although a high volume sector, it struggles with high labour turnover, low staff retention and difficulties in recruiting. This results in some recruiting from overseas – enticing foreign workers with bed and board.

Between January 2019 – December 2022, *Kitchen and Catering Assistants* and *Chefs* both featured in the top 10 occupations in online job postings – although it's important to note these don't include *offline* job postings. These occupations have shown persistent activity alongside *Care workers*, *Nurses* and *Sales related occupations* indicating relentless recruitment activity from the sector.

⁶⁰ "Britain's visitor economy facts", *Visit Britain*, <<https://www.visitbritain.org/visitor-economy-facts>>

⁶¹ "The UK tourism productivity gap", *University of Surrey* (for Visit Britain), <https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/tourism_productivity_gap_october_2019.pdf>

In terms of local provision, in 2021-22, there were over 1,000 achievements (5.9% of all achievements) in *Leisure, Travel and Tourism* sector subject area – mostly at level 3. Apprenticeship starts in this subject were very low although in line with national levels⁶².

⁶² “Annex A: Local Strategic Context”

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

<p>73,804</p> <p>Jobs (2019)</p> <p>66% above National average</p>	<p>-7.1%</p> <p>% Change (2019 - 2022)</p> <p>Nation: +4.1%</p>	<p>12,774</p> <p>businesses (2021)</p> <p>87% have 1-4 employees</p>	<p>£50.9k</p> <p>Average wages per job:</p> <p>LSIP = £31.0k South East = £30.5k Nation = £30.4k</p>
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Programmers and software development professionals
2. IT business analysts, architects and systems designers
3. IT user support technicians
4. Information technology and telecommunications professionals n.e.c.
5. IT operations technicians

TOP SPECIALISED SKILLS:

1. Agile methodology
2. SQL (Programming language)
3. Javascript (Programming language)
4. Microsoft Azure
5. C# (Programming language)

TOP SOFT SKILLS:

1. Communications
2. Management
3. Customer service
4. Problem solving
5. Leadership

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Rushmoor
4. Reigate and Banstead
5. Woking

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

There were over 2mn vacancies for UK tech roles between 2021 and 2022, helping to sustain an economy that grew by around 115% between 2011 and 2022 to 4.7mn workers⁶³. As a cluster of industries the IT sector makes a significant contribution to the LSIP productivity advantage through large numbers of high value jobs in (e.g.) *Programmers and software development professionals* and *IT Specialist Managers*⁶⁴. There is also a recognised Cyber Security Cluster within the LSIP area⁶⁵.

Almost 80% of nationally advertised tech roles are at senior levels which can obstruct progression to those at an earlier stage in their career⁶⁶.

⁶³ "People and skills report 2022", Technation, <<https://technation.io/people-and-skills-report-2022/#key-statistics>>

⁶⁴ "Annex A: Local Strategic Context", p.27

⁶⁵ Surrey Cyber Security Cluster, <<https://surrencyber.com/>>

⁶⁶ "People and skills report 2022", Technation, <<https://technation.io/people-and-skills-report-2022/#key-statistics>>

The top occupations advertised across the LSIP area between January 2019 – December 2022 included Programmers, Developers, Analysts, Architects and Technicians and the top technical skills included Agile, Azure and programming languages such as SQL, Javascript and C#⁶⁷ - all very similar to those reported by the BCS⁶⁸.

Cybersecurity and Cloud technologies are top priorities for UK IT leaders and professionals⁶⁹ – both of which require specific skills and were cited amongst priority technical skills from local IT employers along with AI and machine learning, Data, Product development, Programming and Microsoft 365⁷⁰.

These employers also cited specific challenges such as onboarding and supporting early career individuals (including apprentices) in a sector that is increasingly used to remote or hybrid ways of working; retaining apprentices after they have qualified – often attracted to higher salary offers from competitors; diversifying the workforce – particularly in attracting women and neurodiverse people⁷¹.

Technology has significant potential impact in combating climate change, the Green Skills demand report projects that demand for green IT professionals will increase by 41% by 2030⁷². It is critical that IT courses have sufficient green content to allow those completing them to progress into green roles.

Skills and the capability gap are key resource drivers identified by IT leaders and professionals who cite ‘upskilling’ as the top solution to addressing these, over and above recruitment⁷³ - good news for colleges (for example) who, in 2021-22, supported 550 achievements (2.9% of all achievements) in the *Information and communication technology* sector subject area – mostly at level 2. Apprenticeship starts in this subject area (2020-21) accounted for around 6%; more than the national proportion⁷⁴. Similarly, in 2021 for this sector across the nation there was an 8% rise in apprenticeship vacancies and a significant increase in apprenticeship starts (3,500 compared to 5,500 the previous year)⁷⁵.

CASE STUDY: As one of the UK’s most ambitious, high growth technology companies⁷⁶, SaaS intranet company **Invotra** cites investment in apprenticeships as a significant factor in its success. Each day, Invotra powers intranets for over 47% of UK civil servants with a team of 65 employees, of which 34 (52%) are past or present apprentices, many of whom are now in senior management positions, including Directorships.

⁶⁷ “Annex A: Local Strategic Context”, p.27

⁶⁸ “State of the nation report 2022”, BCS, <<https://interact.bcs.org/pdfs/bcs-state-nation-report-2022.pdf>>

⁶⁹ “IT in your organisation 2022”, BCS, <<https://www.bcs.org/policy-and-influence/tech-and-society/bcs-report-it-in-your-organisation-2022/>>

⁷⁰ “Annex B.2: Employer Engagement Summary Reports”, p. 13

⁷¹ “Annex B.2: Employer Engagement Summary Reports”, p. 13

⁷² “Annex A.2: Green skills demand report”, p. 10

⁷³ “IT in your organisation 2022”, BCS, <<https://www.bcs.org/policy-and-influence/tech-and-society/bcs-report-it-in-your-organisation-2022/>>

⁷⁴ “Annex A: Local Strategic Context”

⁷⁵ “State of the nation report 2022”, BCS, <<https://interact.bcs.org/pdfs/bcs-state-nation-report-2022.pdf>>

⁷⁶ “Meet the UK’s 70 fastest-growing tech firms”, City AM, <<https://www.cityam.com/meet-the-uks-70-fastest-growing-tech-firms/>>

Winners of the BCS SME Employer of The Year, 2019, Woking-based Invotra are also involved in the local skills agenda through the Enterprise M3 Skills Advisory Panel and the South East Apprenticeship Ambassador Network and also work alongside many local schools to help with skills and meaningful work experience.

Profile: Land-based (including Animal health and welfare)

Alignment to strategic priorities:

National Hampshire CC Surrey CC Coast to Capital Enterprise M3

<p>22,146</p> <p>Jobs (2019)</p> <p>40% above National average</p>	<p>-3.4%</p> <p>% Change (2019 - 2022)</p> <p>Nation: +0.7%</p>	<p>3,925</p> <p>businesses (2021)</p> <p>77% have 1-4 employees</p>	<p>£22.8k</p> <p>Average wages per job:</p> <p>LSIP = £31.0k South East = £30.5k Nation = £30.4k</p>
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Sports coaches, instructors, and officials
2. Gardeners and landscape gardeners
3. Veterinarians
4. Animal care service occupations n.e.c.
5. Veterinary nurses

TOP SPECIALISED SKILLS:

1. Landscaping
2. Mowing
3. Gardening
4. Machinery
5. Weed control

TOP SOFT SKILLS:

1. Communications
2. Management
3. Coaching
4. Customer service
5. Planning

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Winchester
4. Woking
5. Test Valley

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

The land-based sector traditionally relates to farming and industries connected to the land and environment, including horticulture, food production, forestry, conservation, landscaping and equine (horses). This report extends it to also include Animal health and welfare to incorporate the important work of veterinarians and veterinary nurses.

British food and farming contributes more than £127bn (GVA) to the economy and supports over 4mn jobs. The horticulture and landscaping sector is worth £28.8bn (GVA) to the economy and supports nearly 675,000 jobs⁷⁷. The sector offers a huge variety of roles at all skills levels ranging from elementary occupations such as cleaners to high skilled roles such as veterinarians and engineers – highlighting the reliance on Science, Technology, Engineering and Mathematics (STEM) skills.

However, feedback from the LSIP land-based roundtable indicated that where much of the work is *land* based (i.e. outside) this can be off-putting for some young people – something that was also reported in the Construction roundtable, particularly with respect to working in the unpredictable British weather⁷⁸. Employers also warned that those interested in

⁷⁷ “British Farming: Inspiring a nation”, NFU, <<https://www.nfuonline.com/media/3e3fmoec/british-farming-inspiring-a-nation.pdf>>

⁷⁸ See Land-based and Construction: “Annex B.2: Employer Engagement Summary Reports”

working need to be equipped with employability skills (such as communication, teamwork, resilience and problem solving); need to take full advantage of work experience opportunities to help them make an informed decision about their career plans – for example, is it as well paid as you might think⁷⁹?

At a national level, the land based sector faces workforce challenges on a number of fronts such as labour shortages in food and farming due to the pandemic and Brexit⁸⁰ and veterinary workforce shortages following a drop in new EU registrants⁸¹.

The Land-based sector plays a significant role in the journey to Net Zero. For example, farmers produce renewable energy that helps power an average of 10 million UK homes⁸² and four occupations in the sector are included in the top 50 green occupations such as *Conservation professionals* and *Agricultural trades*⁸³. As new technologies become available in the low carbon economy, it is crucial the skills, training and development needs of the sector and its workforce are recognised and addressed to take advantage of new innovations. Education and training providers can play a significant role here.

In terms of local provision, in 2021-22, there were over 2,200 achievements (11.8% of all achievements) in *Agriculture, Horticulture and Animal Care* sector subject area – mostly at level 3. Apprenticeship starts in this subject were very low although a slightly higher proportion compared to national⁸⁴.

CASE STUDY: Farmers and growers own and operate forward-thinking businesses that are at the forefront of implementing new technologies, where the conditions are right. Sometimes, they need trusted partners before they invest.

Sparsholt College Hampshire is currently exploring new growing techniques with a local supplier that has the potential to significantly reduce the environmental impact on growing certain types of plants. By working with the college, this business will be able to test and further develop their product with the college and their network of businesses in the land based sector.

⁷⁹ Email correspondence from Chessington Zoo.

⁸⁰ “Labour shortages in the food and farming sector”, *House of Commons*, <<https://committees.parliament.uk/publications/9580/documents/162177/default/>>

⁸¹ “BVA is highlighting a storm of workforce shortages following a drop in new EU registrants and a huge rise in demand for export health certificates”, *BVA*, <<https://www.bva.co.uk/news-and-blog/news-article/uk-s-veterinary-workforce-crisis-deepens-as-eu-registrant-numbers-drop-by-over-two-thirds-since-brexit/>>

⁸² “British Farming: Inspiring a nation”, *NFU*, <<https://www.nfuonline.com/media/3e3fmoec/british-farming-inspiring-a-nation.pdf>>

⁸³ “Annex A.2: Green skills demand report”, p. 18

⁸⁴ “Annex A: Local Strategic Context”

Profile: Professional Services

Alignment to strategic priorities:

National Hampshire CC Surrey CC **Coast to Capital** Enterprise M3

94,672 Jobs (2019) 7% above National average	+3.3% % Change (2019 - 2022) Nation: +4.7%	22,149 businesses (2021) 88% have 1-4 employees	£36.0k Average wages per job: LSIP = £31.0k South East = £30.5k Nation = £30.4k
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Source: Lightcast

TOP ONLINE POSTED OCCUPATIONS:

1. Sales related occupations n.e.c.
2. Other administrative occupations n.e.c.
3. Customer service occupations n.e.c.
4. Marketing and sales directors
5. Chartered and certified accountants

TOP SPECIALISED SKILLS:

1. Finance
2. Accounting
3. Marketing
4. Invoicing
5. Auditing

TOP SOFT SKILLS:

1. Communications
2. Sales
3. Management
4. Customer service
5. Detail oriented

JOB POSTINGS REGIONAL BREAKDOWN:

1. Guildford
2. Basingstoke and Deane
3. Reigate and Banstead
4. Rushmoor
5. Elmbridge

Data are for January 2019 – December 2022 | Source: Lightcast

Additional insights and intelligence

Over 2.2mn people in the UK worked in professional services in 2022; around 1mn in financial services and 1.2mn in related professional services such as management consultancy, accountancy and legal services⁸⁵. Most jobs are in London, followed by the South East and the North West.

During the last decade, the main source of change to this sector has been technological: from the emergence of fintech (financial technology) and insurtech (insurance and technology) to the influences of blockchain and artificial intelligence⁸⁶. These are significant as they bring with them impacts on skills – replacing some (e.g. accounting and financial analysis skills) but also introducing others (e.g. programming and cyber security).

As a cluster of industries, Professional services makes a significant contribution to the LSIP productivity advantage through large numbers of high value jobs in (e.g.) *Management consultants and business analysts, Sales accounts and business development managers* and

⁸⁵ "Financial and professional services show strong pandemic recovery", *TheCityUK*, <<https://www.thecityuk.com/news/financial-and-professional-services-show-strong-pandemic-recovery/>>

⁸⁶ "Financial and Professional Services: Trade challenges and opportunities post pandemic", *The Economist*, <https://impact.economist.com/perspectives/sites/default/files/eiu_dit_financial_and_prof_services_2021.pdf>

*Marketing and sales directors*⁸⁷. It is also in sales related occupations where the online job postings data shows the most demand from this sector – the area has some strong professional services to offer but if we don't have the skills to sell them... Local employers also reported a lack of employability skills – these are picked up in the next section.

In terms of local provision, in 2021-22, there were over 1,300 achievements (6.9% of all achievements) in *Business, Administration and Law* sector subject area – mostly at level 3. Apprenticeship starts in this subject were significant at 3,375, representing 35% of all apprenticeship starts and a higher proportion when compared to national at 30%⁸⁸.

CASE STUDY: In January 2021, the **Enterprise M3 Skills Advisory Panel** had a focus on **Business to Business sales skills**, following consistent labour market data showing employer demand for sales occupations.

The Panel meeting included presentations from the **Institute of Sales Professionals** and two local SMEs – **Emsi** (now **Lightcast**) and **3-Space** to give some background and real examples of how different businesses have tried to address the challenge of finding and retaining strong business development talent.

Out of this meeting, local colleges and the Surrey Chambers of Commerce were able to work with the Institute of Sales Professionals to create some **free practical Sales courses**, aimed at local businesses and funded by the Department for Education as part of the **Strategic Development Fund** project.

A **new, free online course**, *Transforming International Sale Results*, is also in development and will be available via the Innovation South Virtual Campus: <https://em3.isvc.co.uk/>

⁸⁷ "Annex A: Local Strategic Context", p. 27

⁸⁸ "Annex A: Local Strategic Context"