



SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP

# South East LEP Economy and Skills report

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Supporting document to SELEP Skills Strategy



# South East LEP Economy and Skills report

(Supporting document to SELEP Skills Strategy)

This report has been produced to support the South East LEP Skills Strategy to provide further detail and evidence. Information contained includes LEP wide statistics and growth information for areas such as business size and growth, skills levels, apprenticeship starts and population growth. Information contained in this report is also available at district level in the supporting 'District Tables and Graphs' document. Additional sector growth and geographical reports to support the strategy are available on the SELEP website.

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## Key Facts

**Population: 4,170,400**

## Projected population to 2030: 4.6m

**Working age (16-64) population: 2,538,900**

**Total jobs: 1,873,000**

**GVA overall: £85,794m    GVA per head: 81.9**

**Job postings in last 12 months: 367,000**

**% 16-64 year olds with Level 1+ qualifications:**  
**86.5%**

**% 16-64 year olds with level 2+ qualifications:**  
**72.6%**

**% 16-64 year olds with level 3+ qualifications:**  
**52.8%**

**% 16-64 year olds with level 4+ qualifications:**  
**33.3%**

**% 16-64 year olds with no qualifications: 7.5%**

**Weekly earnings by residence: £566.00**

**Weekly earnings by workplace: £514.00**

**Number of people on out of work benefits:**  
**40,070**

**Total number of enterprises: 164,070**

**Total number of SMEs: 163,565**

**Total number of large (250+) companies: 505**

### Total number of apprenticeship starts 2012/13:

## Total number of apprenticeship starts 2015/16:

**Number of secondary schools: 271**

**Number of primary schools: 1,132**

**Number of FE Colleges: 17**

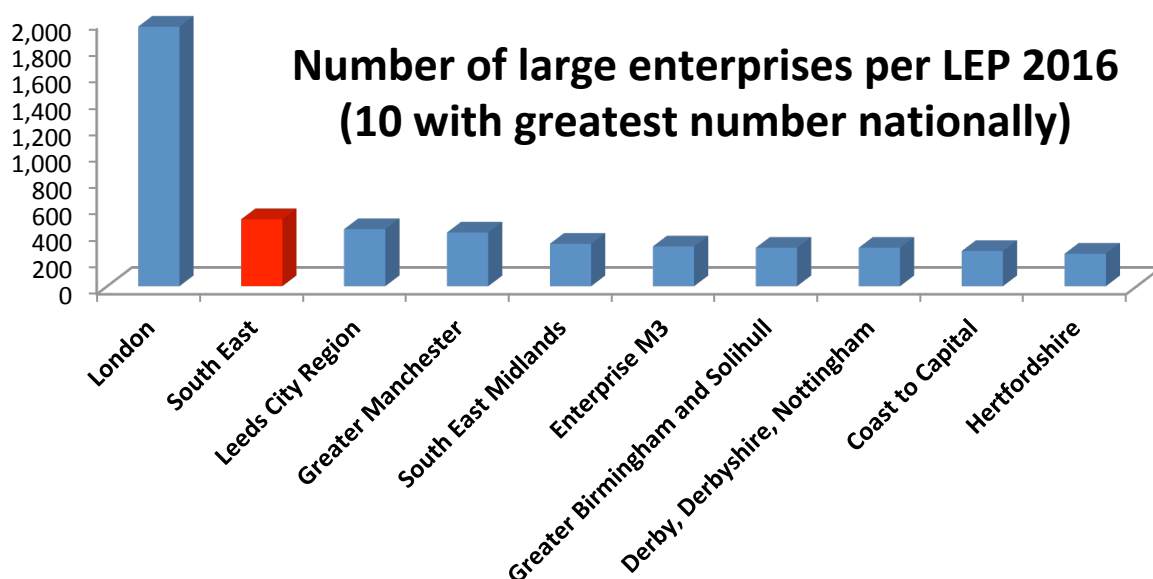
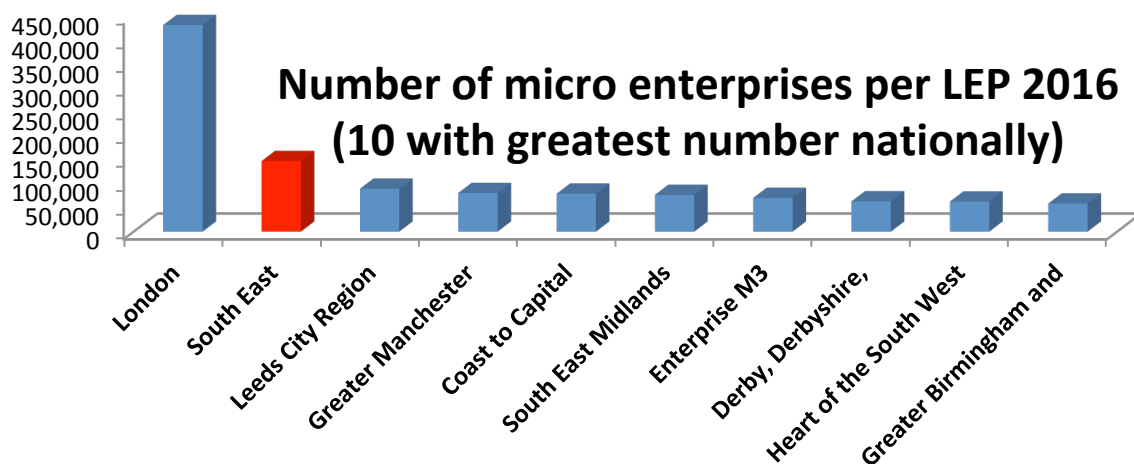
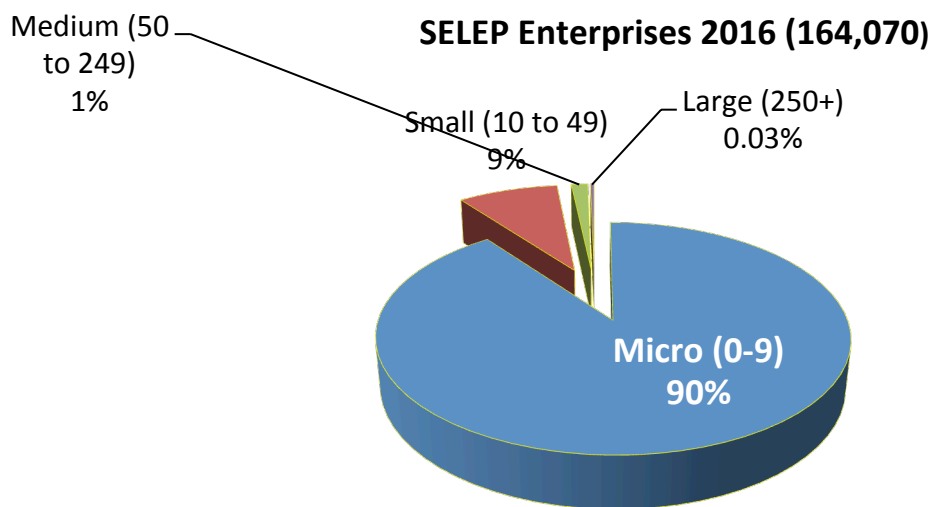
**Number of Universities: 9**

**Total current households: 1,283,500**

**Number of workless households: 178,400**

**Number of children in workless households:**  
**83,300**

SELEP has a far higher number of enterprises (over 164,000) than any other LEP outside London as the charts below illustrate. This demonstrates its importance to national growth and productivity. SELEP has a large number of micro enterprises but also larger numbers of big companies (over 250 employees) than other LEP areas.



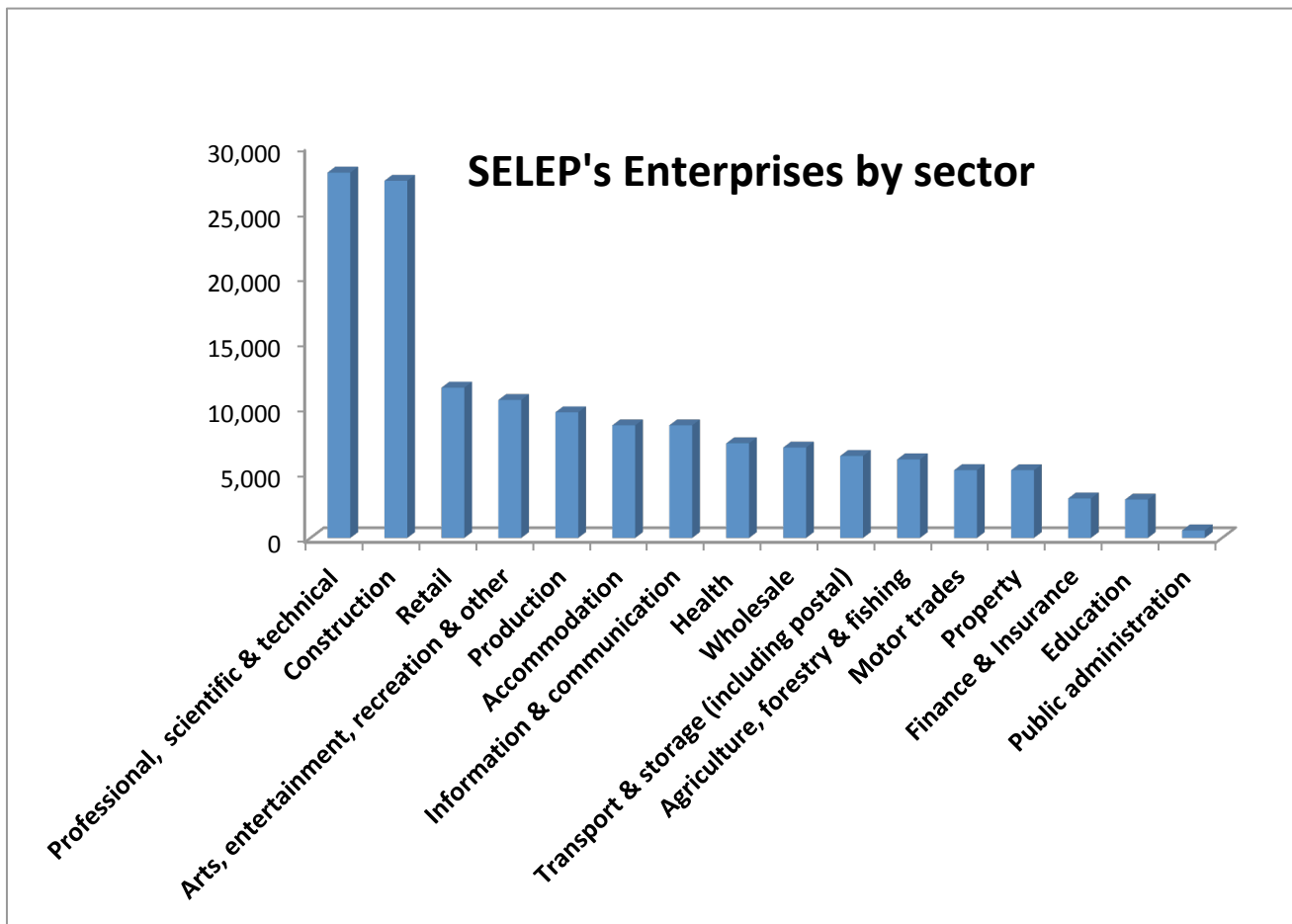
## How many jobs and businesses are there in each sector?

Figures as below for employee jobs and enterprises illustrate that those identified as priorities by SELEP are appropriate in having large numbers of enterprises and employees; health, care, manufacturing, construction, logistics ((transportation and storage), IT, finance, creative technical and scientific. Tourism and agriculture are important within different locations across SELEP and a priority area. It should be noted that wholesale and retail employs the largest number and has a large number of enterprises so is a significant part of the economic landscape, whilst on average not offering salaries as high as other sectors.

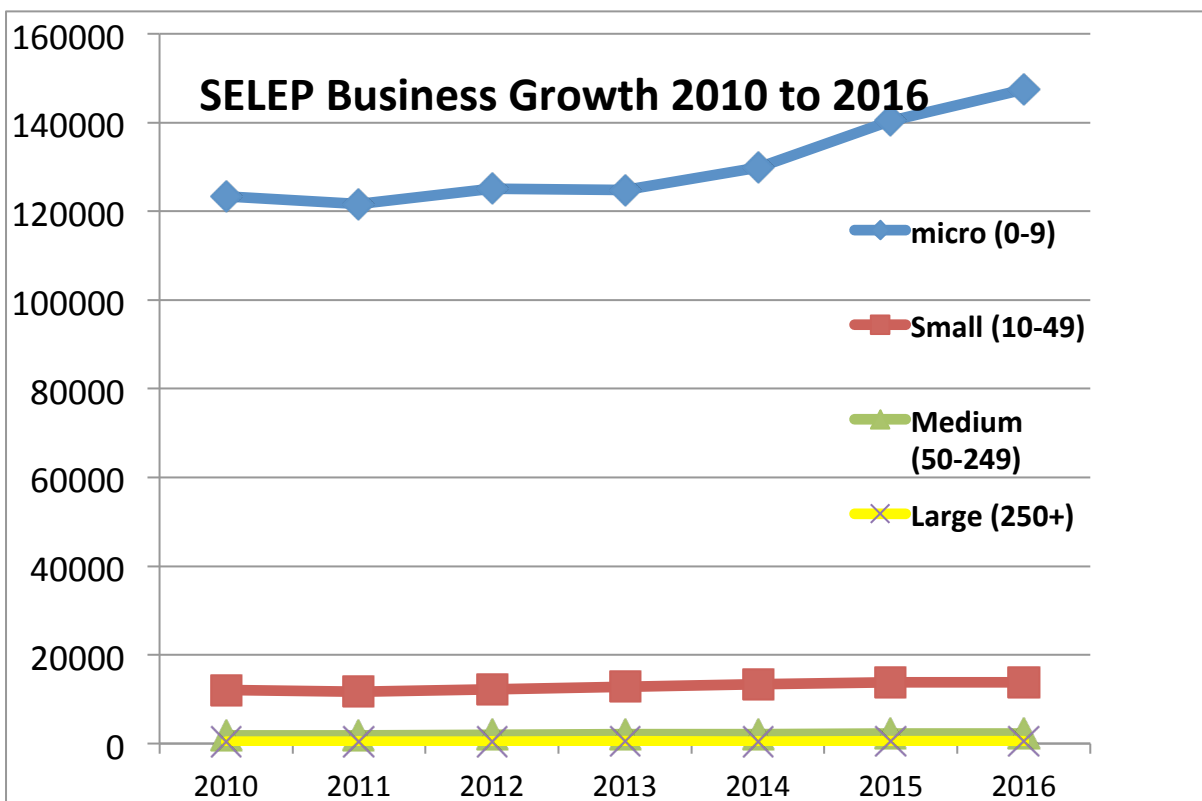
Construction is arguably the top priority given its size and the growth that will result from housing and infrastructure developments on a significant scale. The education sector is a big employer and also has a lot of vacancies, so is considered a priority area for future.



Sector	Total Number of Enterprises
Professional, scientific & technical	27,950
Construction	27,325
Retail	11,495
Arts, entertainment, recreation & other	10,555
Production	9,610
Accommodation	8,615
Information & communication	8,615
Health	7,240
Wholesale	6,920
Transport & storage (including postal)	6,270
Agriculture, forestry & fishing	6,010
Motor trades	5,185
Property	5,180
Finance & Insurance	3,020
Education	2,935
Public administration	575



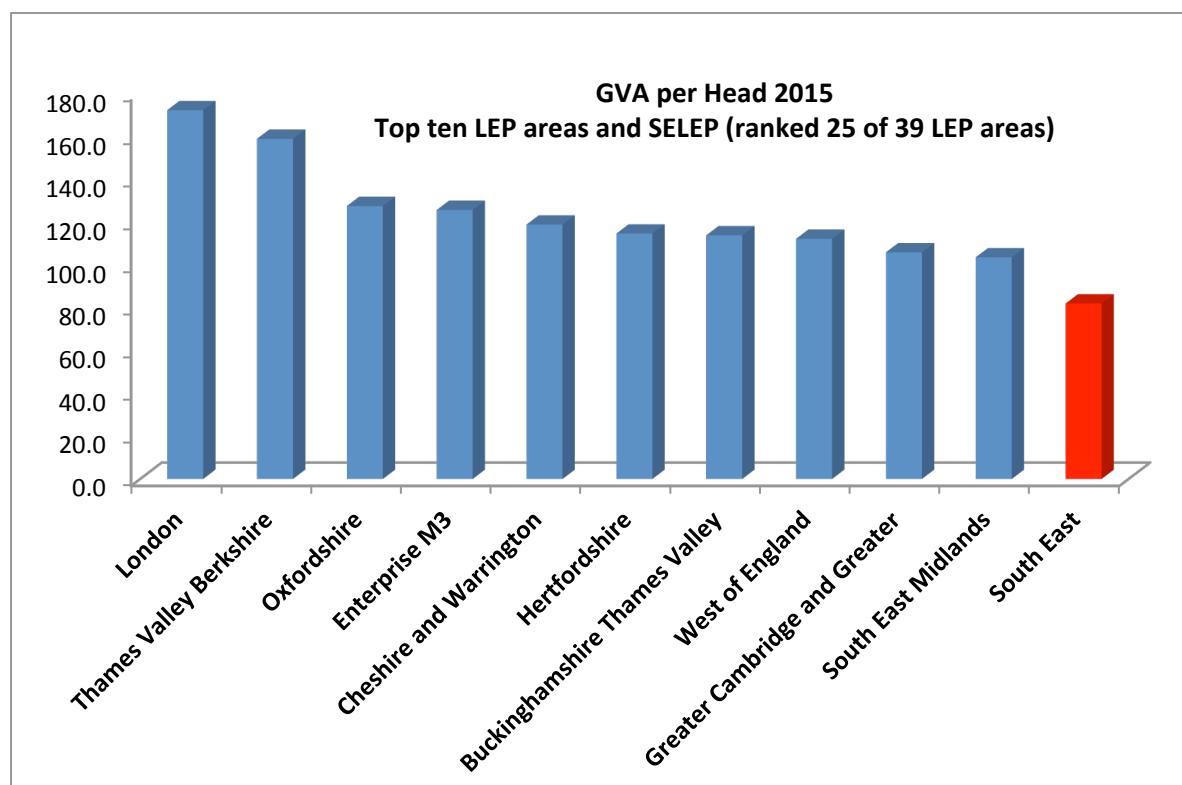
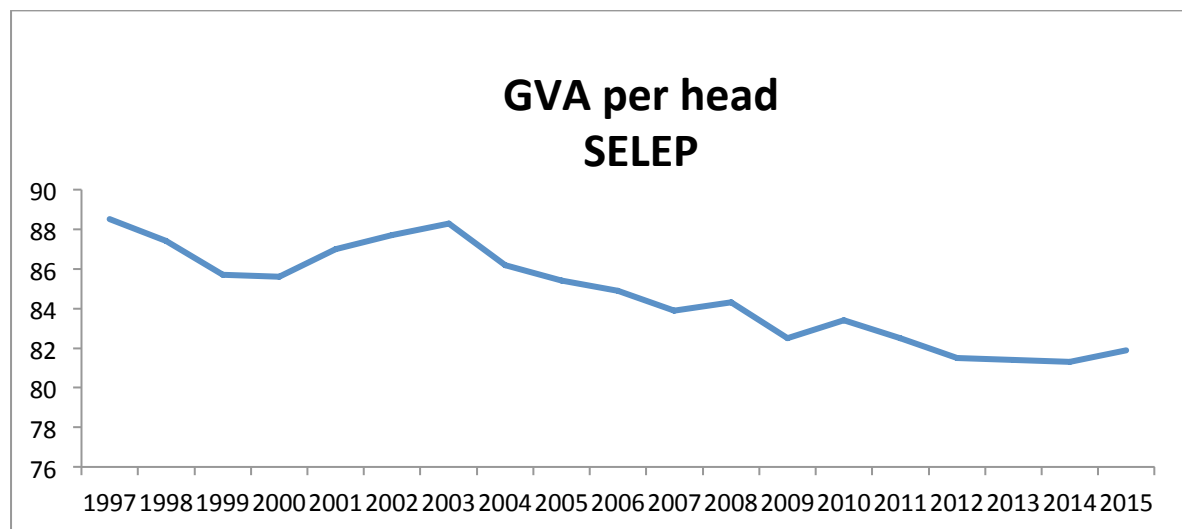
SELEP has seen 19% business growth since 2010, with medium sized businesses seeing 24 % growth. Overall, numbers have increased from 137,590 in 2010 to 164,070 in 2016. The increasing numbers of micro businesses illustrate the strong entrepreneurial and innovative culture across SELEP.



## What is the picture for Gross Value Added (GVA)?

Gross Value Added (GVA) is the measure of goods and services produced in an area, industry or sector of an economy and is therefore a measure of productivity. The SELEP area's GVA overall has increased from £45,528m in 1997 to £85,794m in 2015. This compares to £378,423m in London, £33,864m in Hertfordshire and £59,606m in Manchester.

GVA per head enables comparisons between different areas. As the charts below illustrate, SELEP's GVA per head has fallen in recent years from 88.5 in 1997 to 81.9 in 2015. This is likely to reflect the high levels of out-commuting flows across SELEP. Therefore whilst overall the area is productive, it would be even more so if larger numbers of people living in SELEP's area worked there also.



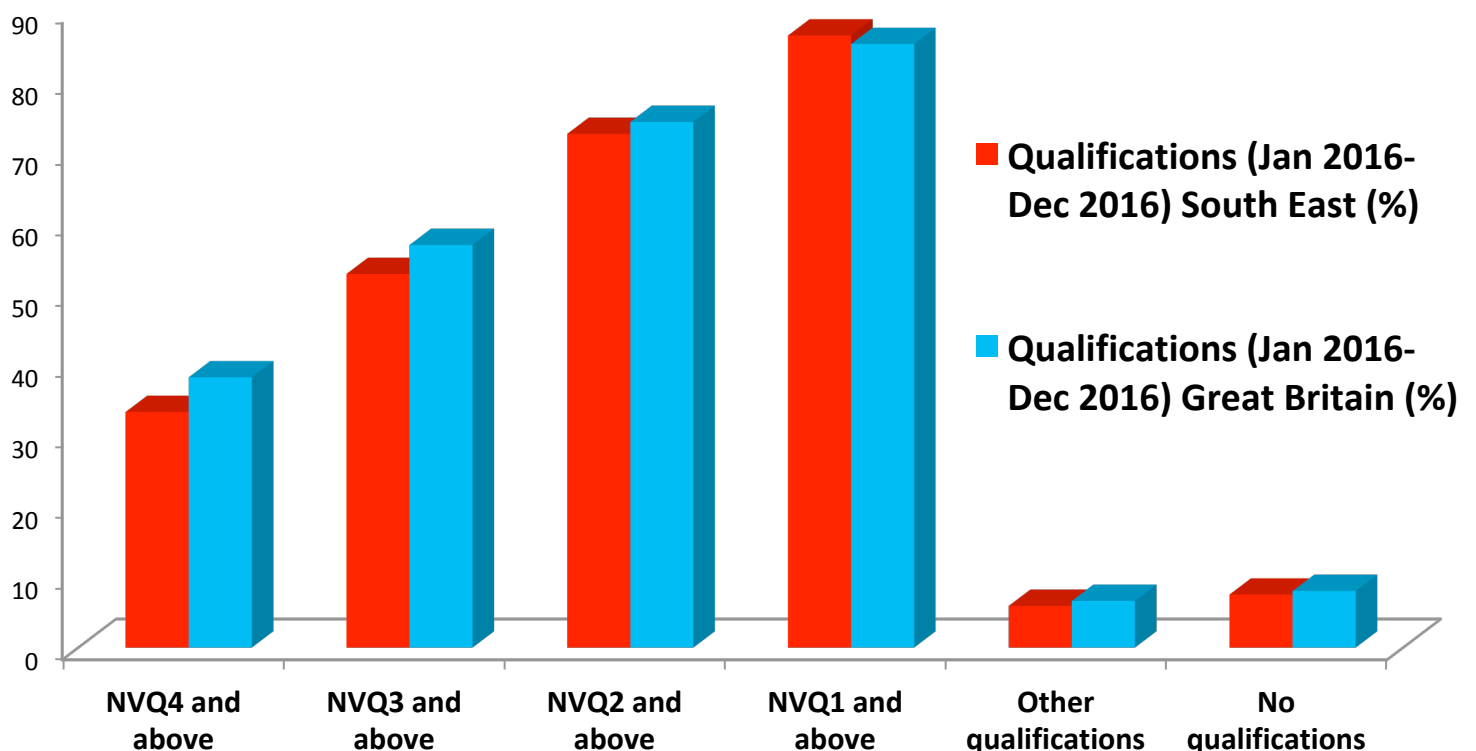


## What are Qualification levels in the SELEP area?

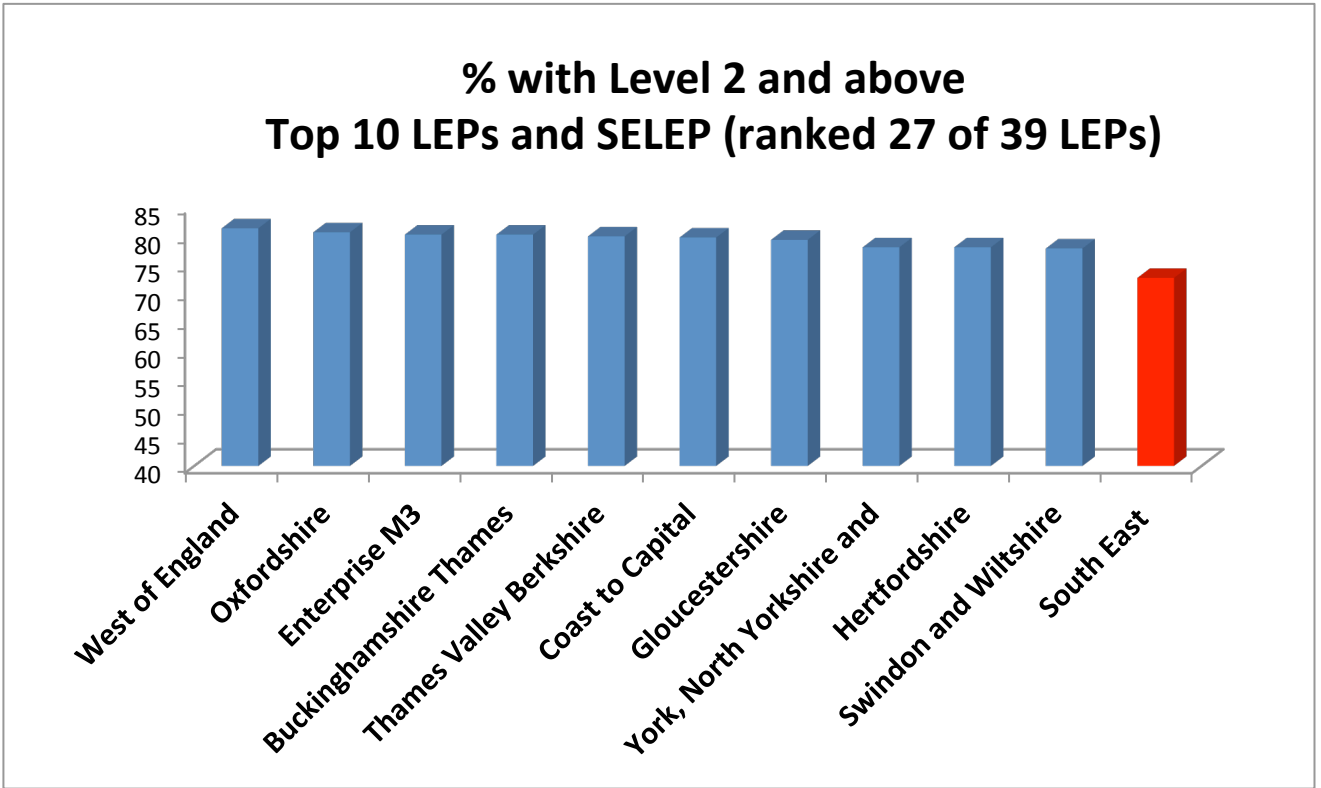
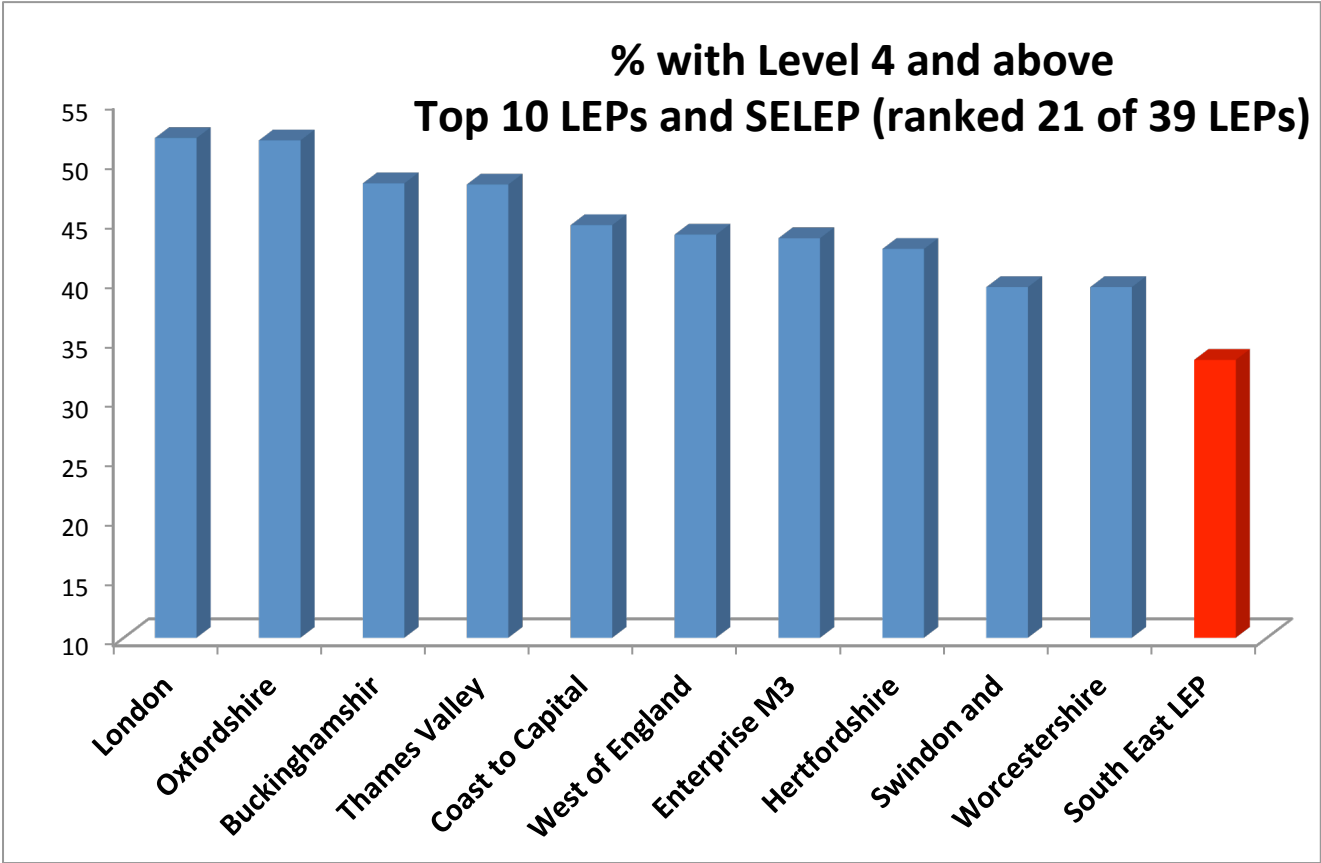
Although improving, for all skills levels other than level 1, SELEP is failing to keep pace with national skills levels, as the chart below illustrates. Notably, SELEP has 53% of people with level 3 (A level equivalent) compared with 60% nationally and 33% with level 4 (Degree equivalent) compared with 38% nationally. With the trend towards greater numbers of high skilled jobs, this is an area to address, for the SELEP area to be nationally and internationally competitive and to provide local populations with skills applicable to the future.

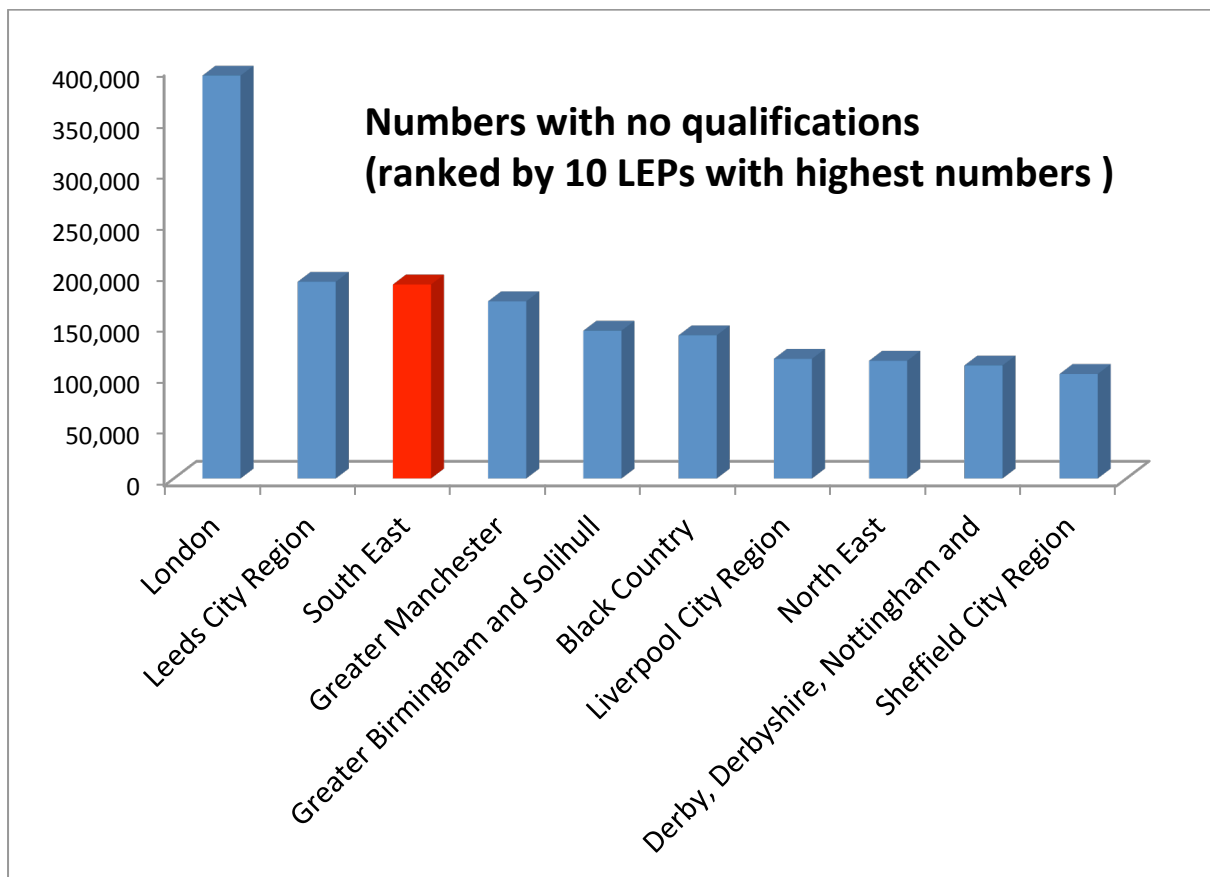
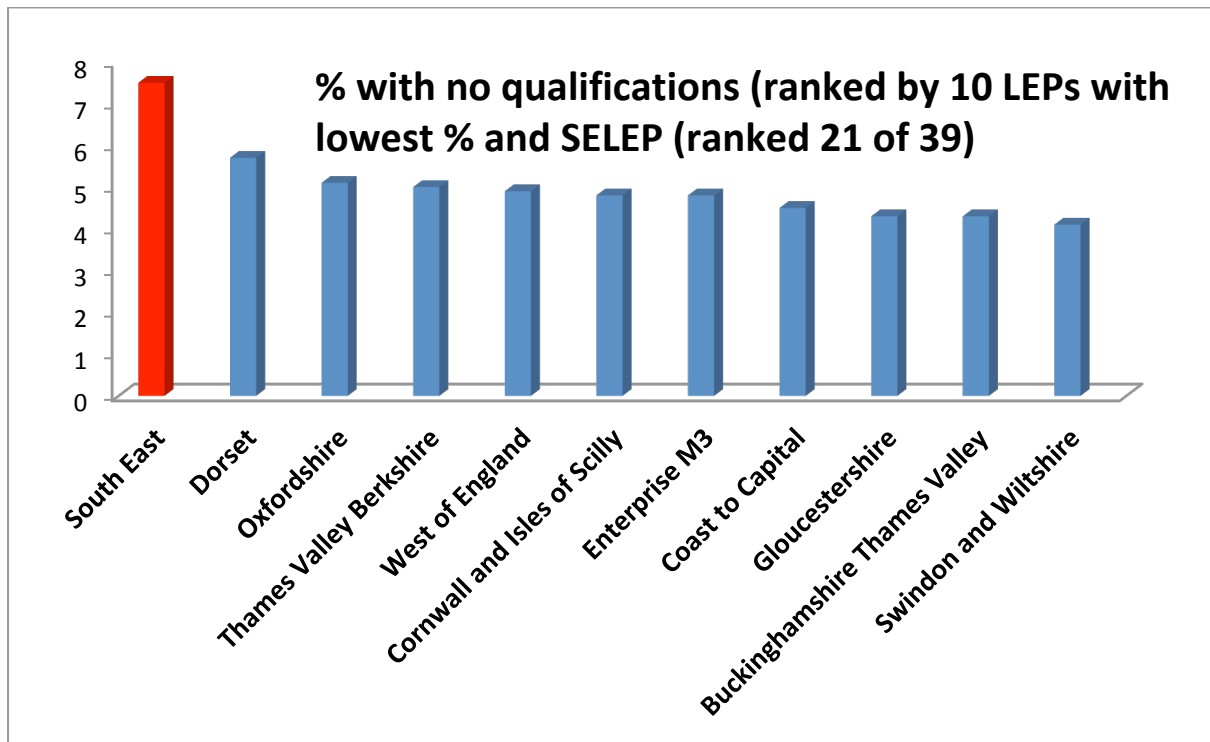
According to a Local Government Association and Learning & Work Institute report, by 2024 there will more than four million too few high-skilled people to take up available jobs, two million too many with intermediate skills and more than six million too many low skilled.

As the tables below illustrates, SELEP falls well behind many other LEP areas – for level 4 and 2 skills, SELEP is ranked 21 out of the 39 LEP areas and the top ten performing areas include those that are geographically close to SELEP such as Coast to Capital, Hertfordshire and Enterprise M3. When looking at areas with the fewest percentages of people with no qualifications, the SELEP area also performs poorly, ranking 21 out of 39 LEP areas in order of those with lowest percentages first.



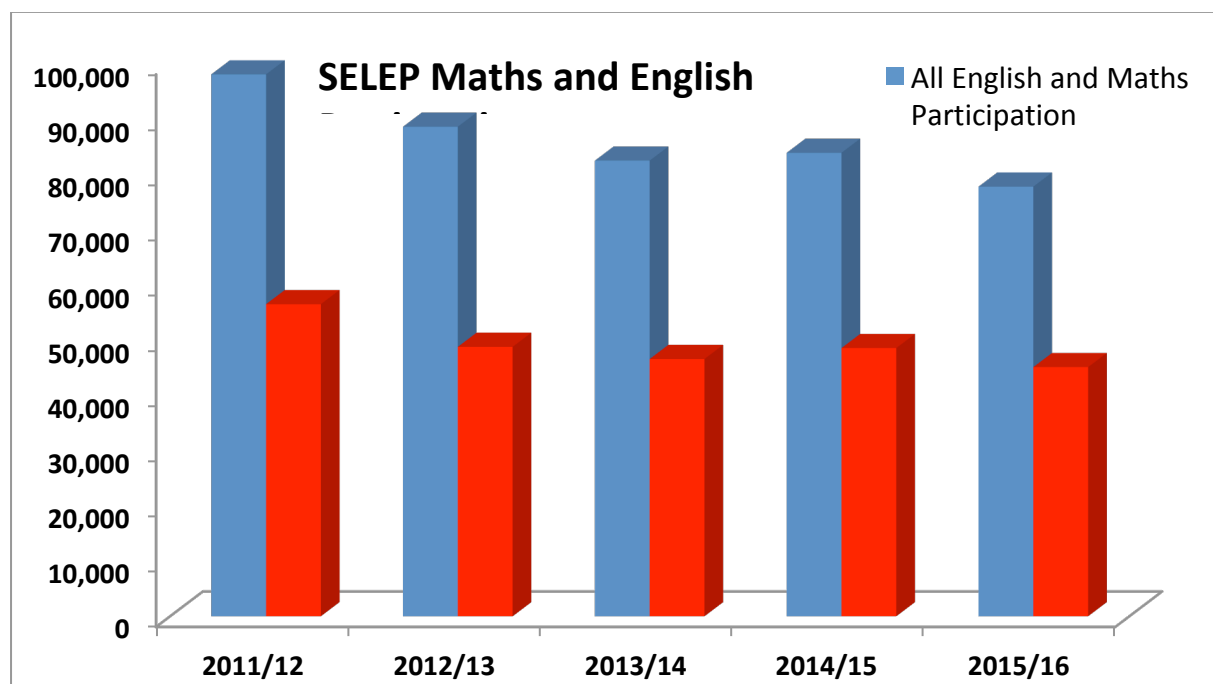
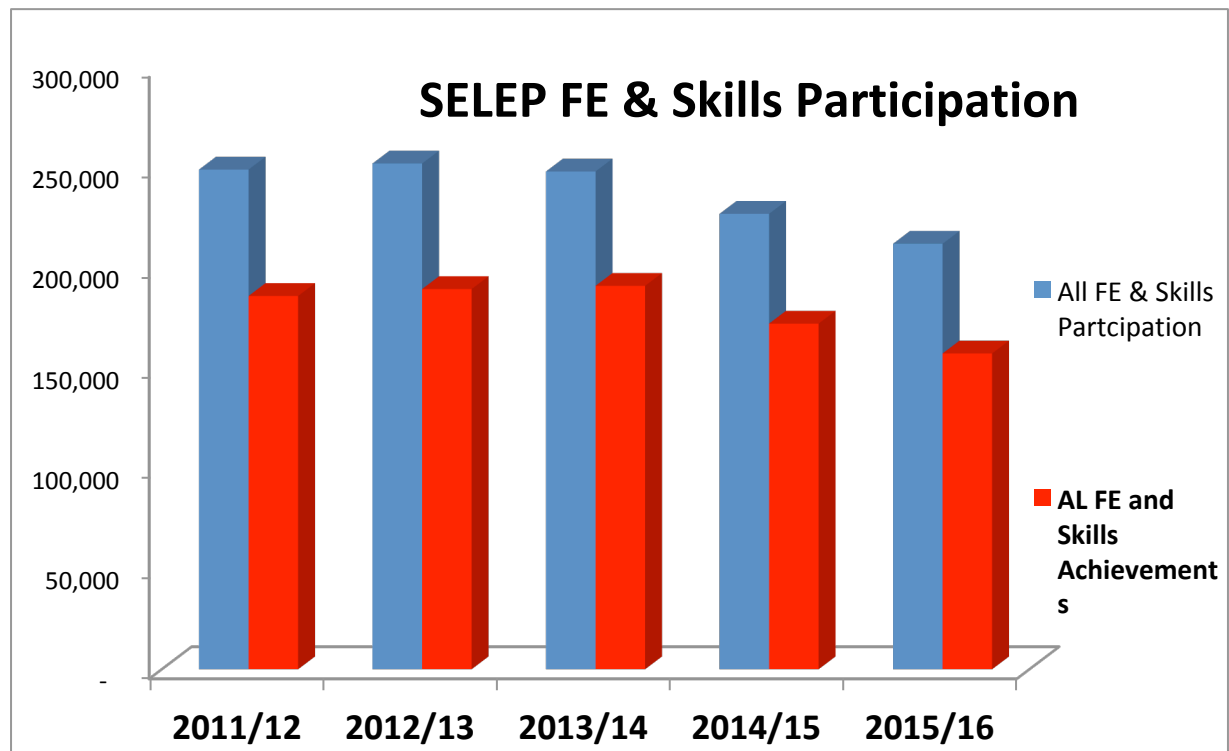






## What do Further Education Participation figures show?

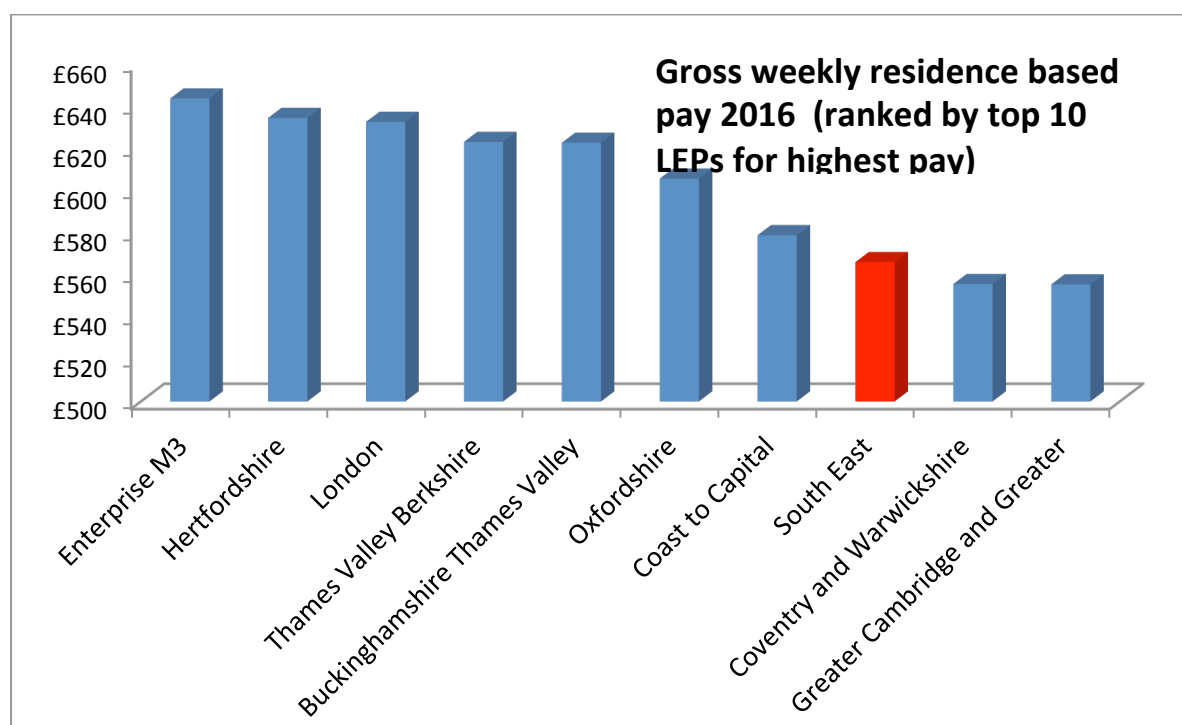
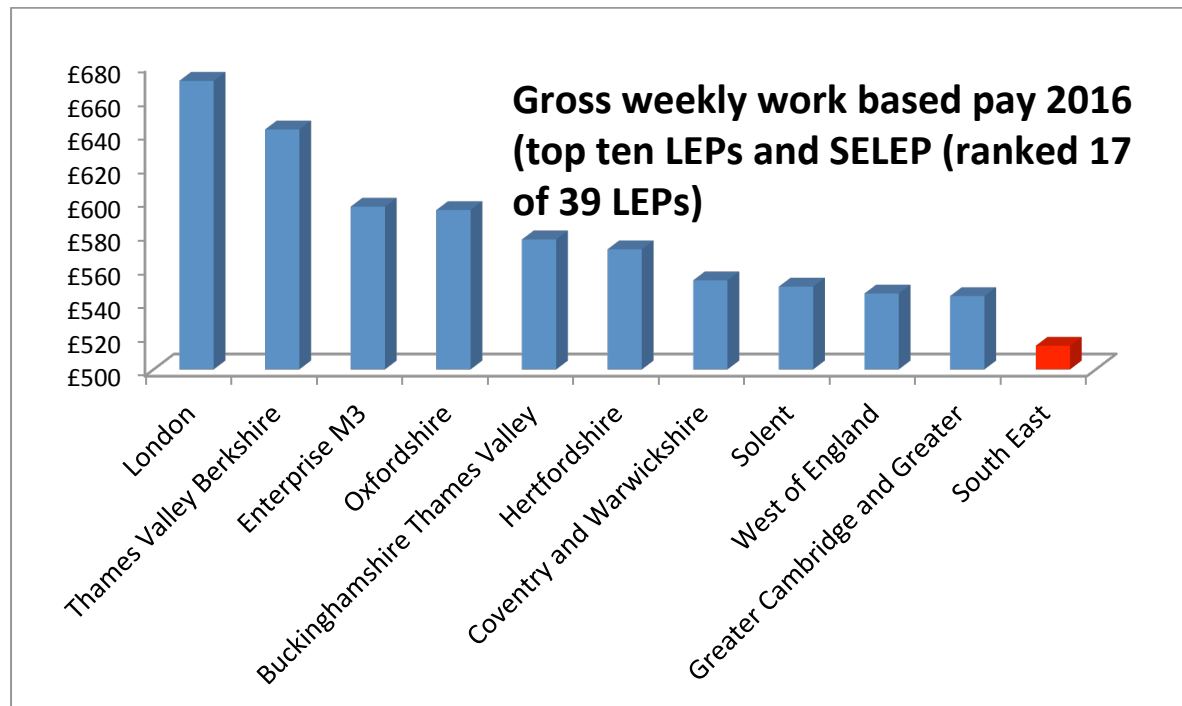
The tables below illustrate year on year falls in all FE and Skills participation and English and maths in recent years, with approximately 37,000 fewer people participating in 2016/16 compared to 2011/12, a large proportion being adults. In the context of the skills levels and numbers with no qualifications as above this is clearly concerning.



## How much do local people earn?

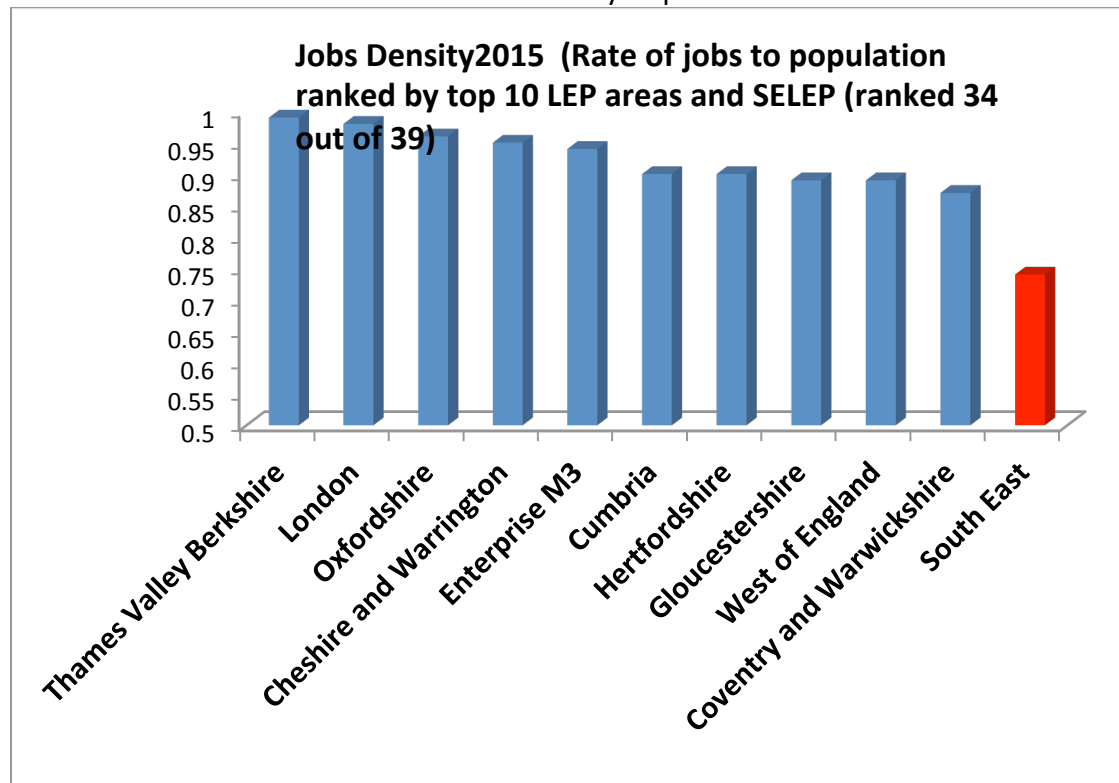
Earnings are acknowledged as a key economic indicator. Work based earnings are those of people working (but not necessarily living) in the SELEP area illustrate the local economy. As the chart illustrates, SELEP's work based weekly pay (£514) is significantly below that of other LEP areas and SELEP ranks 17 of 39 LEP areas in order of those with the greatest earnings first. This may partly reflect the large numbers of jobs in sectors such as care and retail, which have lower average earnings than other sectors.

Residence based pay is higher (£566) which reflects people who live (but do not necessarily) work in the SELEP area so is likely reflecting higher salaries of residents in some SELEP areas working in London.

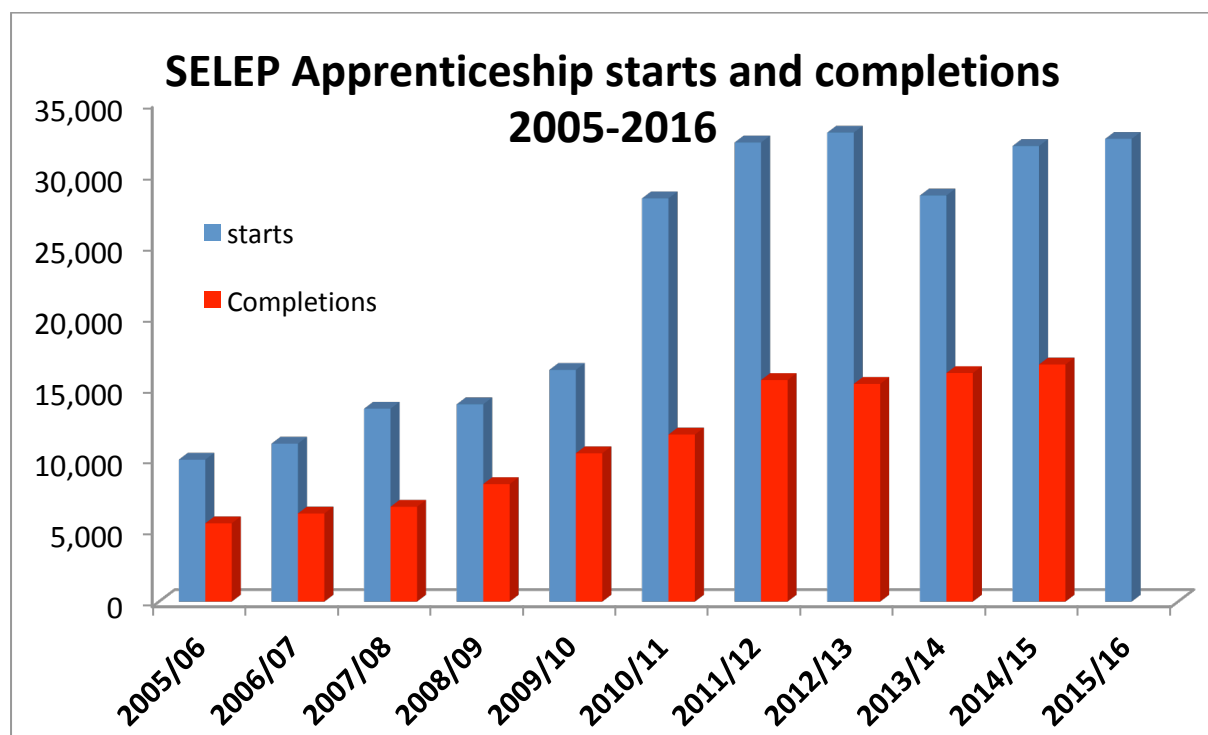


## How many jobs per head of population are there?

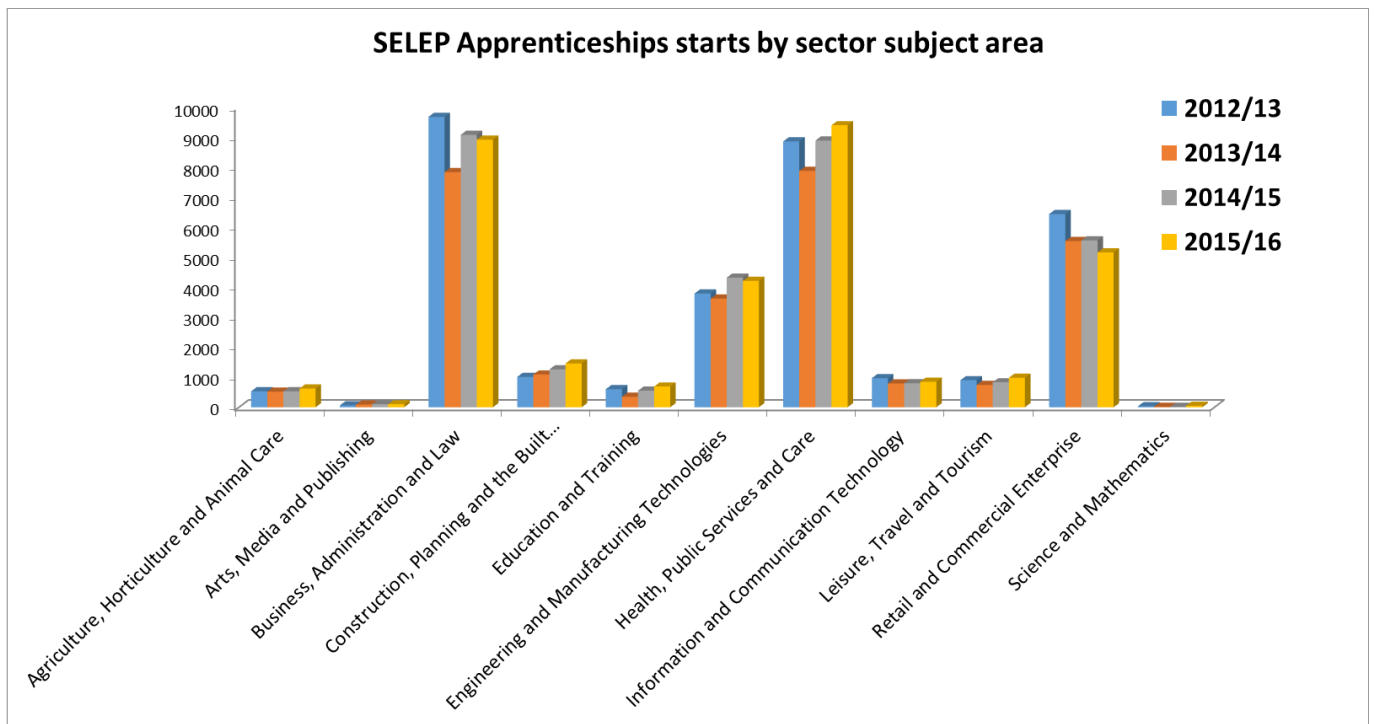
Jobs Density is a measure of the number of jobs per head of population (aged 16-64). A job density of 1 would mean there is a job for every working age resident. At 0.74, SELEP's is well below that of most other LEP areas. This may reflect SELEP's high out commuting levels but does illustrate that SELEP is not necessarily as productive or active as other LEP areas.



## How many Apprenticeships are taken up?



## What sector subjects are apprenticeships in?



The charts above illustrates that apprenticeships have increased overall across the SELEP area over the last 10 years but have remained fairly static (and with a fall in 2013/14) over the last few years. In 2015/16, the total number of starts was 32,430 and the provisional first figure 2016/17 (August to October) was 9,270 which may indicate an end of year increase. Additionally, the largest numbers are in business, administration and law and retail and commercial enterprise with relatively low numbers in some of the priority sectors such as construction and IT. There are higher numbers in health and care and engineering. Further alignment to key sectors is a priority going forward.

Figures are in the context of a population of nearly half a million 15-24 year olds in the SELEP area and the below average skills levels reflected above.

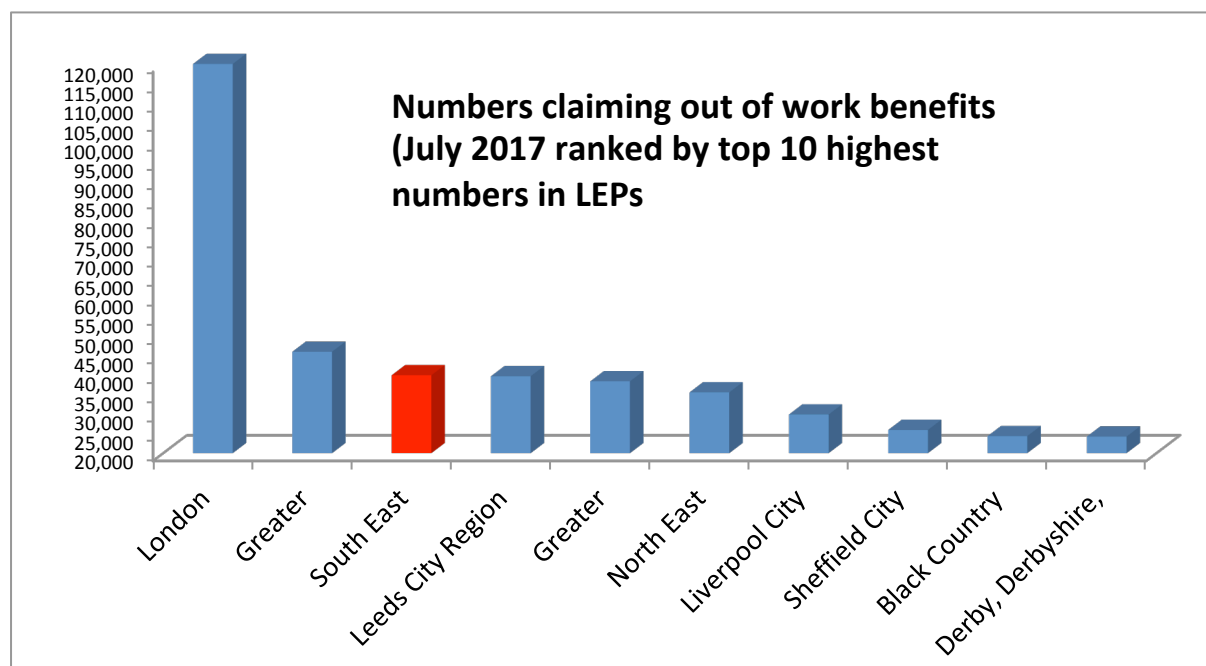
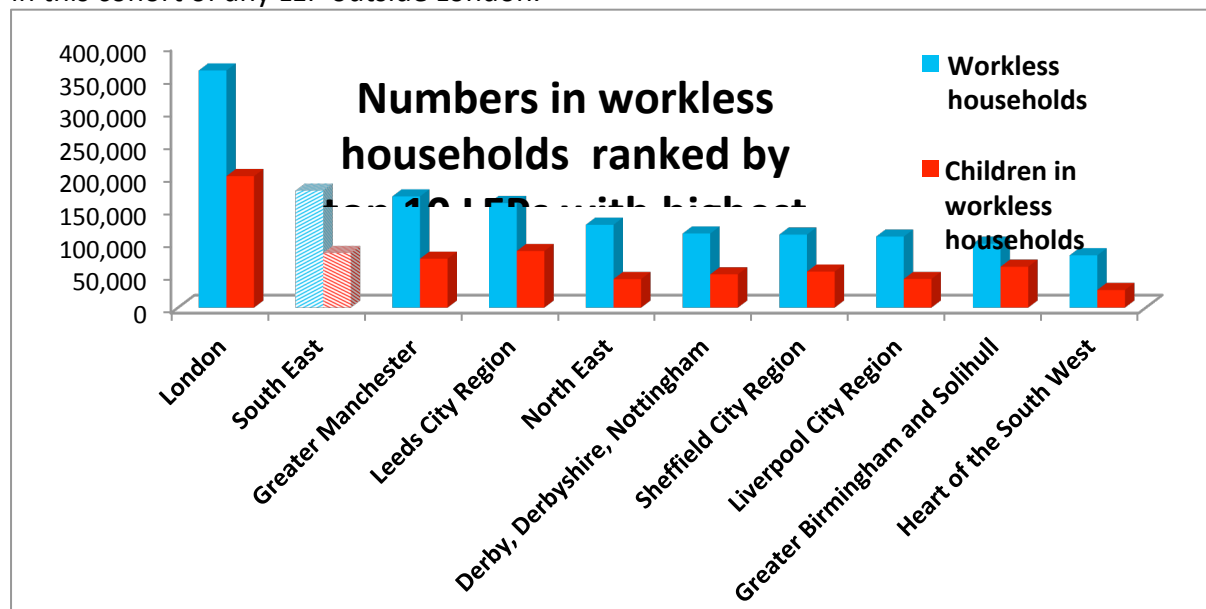
### Example apprenticeship vacancies in SELEP area

- Engineering & Manufacturing Advanced apprenticeship with Network Rail @ £162 per week
- Professional Chef intermediate apprenticeship (retail & commercial enterprise) with a Kent hotel @ £140 per week
- Pharmacy Assistant intermediate Apprentice (health, public services & care) with Essex pharmacy @ £129.50 per week
- IT Degree apprenticeship (digital industries) with Ford Motor company @ £18,654 per year
- Web Developer advanced level (digital industries) at East Sussex web company @ £150 per week
- Dental Nurse Advanced level apprenticeship with Medway Dental practice @ £170 per week
- Health & Social care intermediate level apprenticeship with Southend Care Home @ £129 per week
- Warehouse Operative intermediate level Apprentice (retail and commercial enterprise) with Thurrock company @ £185 per week
- Fabrication & welding intermediate level apprentice at Kent based company @ £140 per week
- Boat builder intermediate apprentice at Essex based company @ £144 per week
- IT support advanced level apprentice at Essex based company @ £200 per week

## Workless households and benefits

The SELEP area has significant numbers of workless households (178,000) and children in workless households (83,000). As the chart illustrates, this is the second greatest number nationally compared with other LEPs next to London. This measures the number of houses only with those who have at least one working age adult. Research this year by UCL Institute of Education (2017) found that children from jobless households are more likely to experience disadvantage in adulthood and more likely to experience poverty.

SELEP also has high numbers of people claiming out of work benefits compared to other LEP areas; over 40,000 in July 2017. This reflects people claiming that are unemployed and therefore available to work. Additionally, there are 531,500 'economically inactive' people across SELEP. This cohort includes students (138,500), those looking after the family home (134,400), retired people (78,900) and people who are long-term sick (99,400). Nearly 135,000 of this cohort are reported as 'wanting a job'. The 'economically inactive' cohort has grown from 494,400 in 2004 to 531,500 in 2017. SELEP has by far the greatest number in this cohort of any LEP outside London.

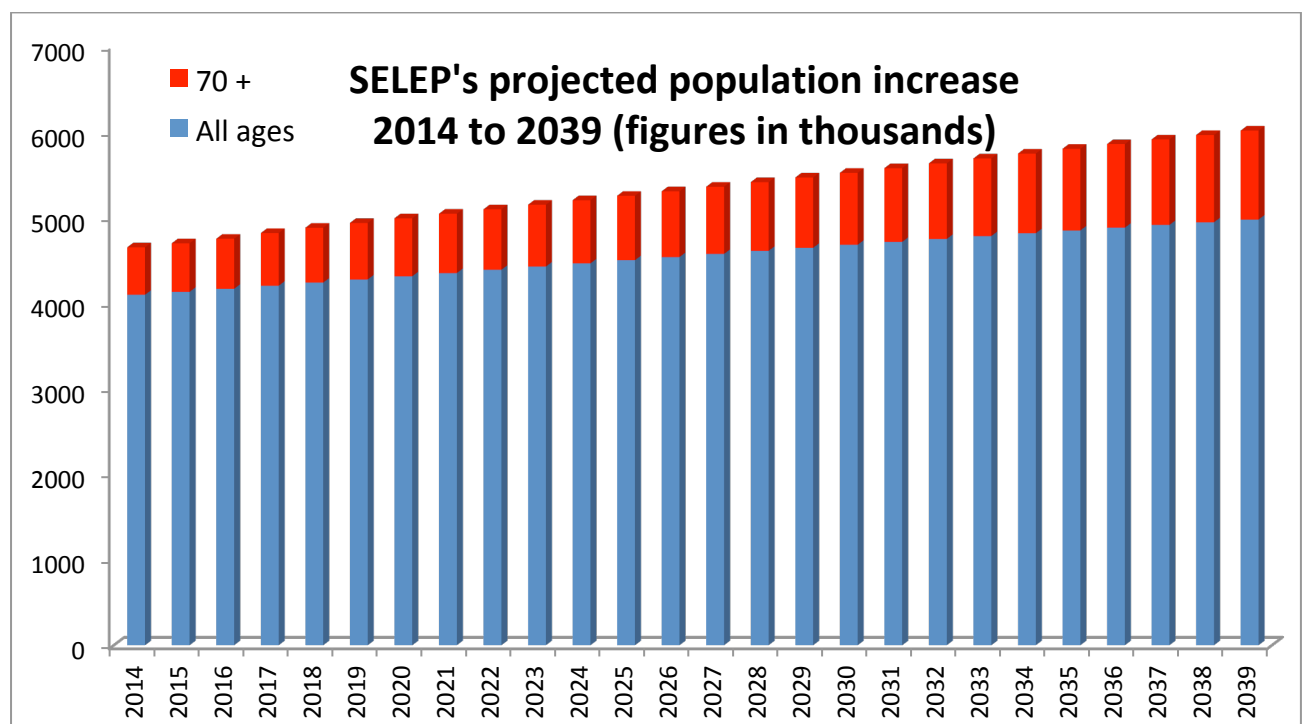
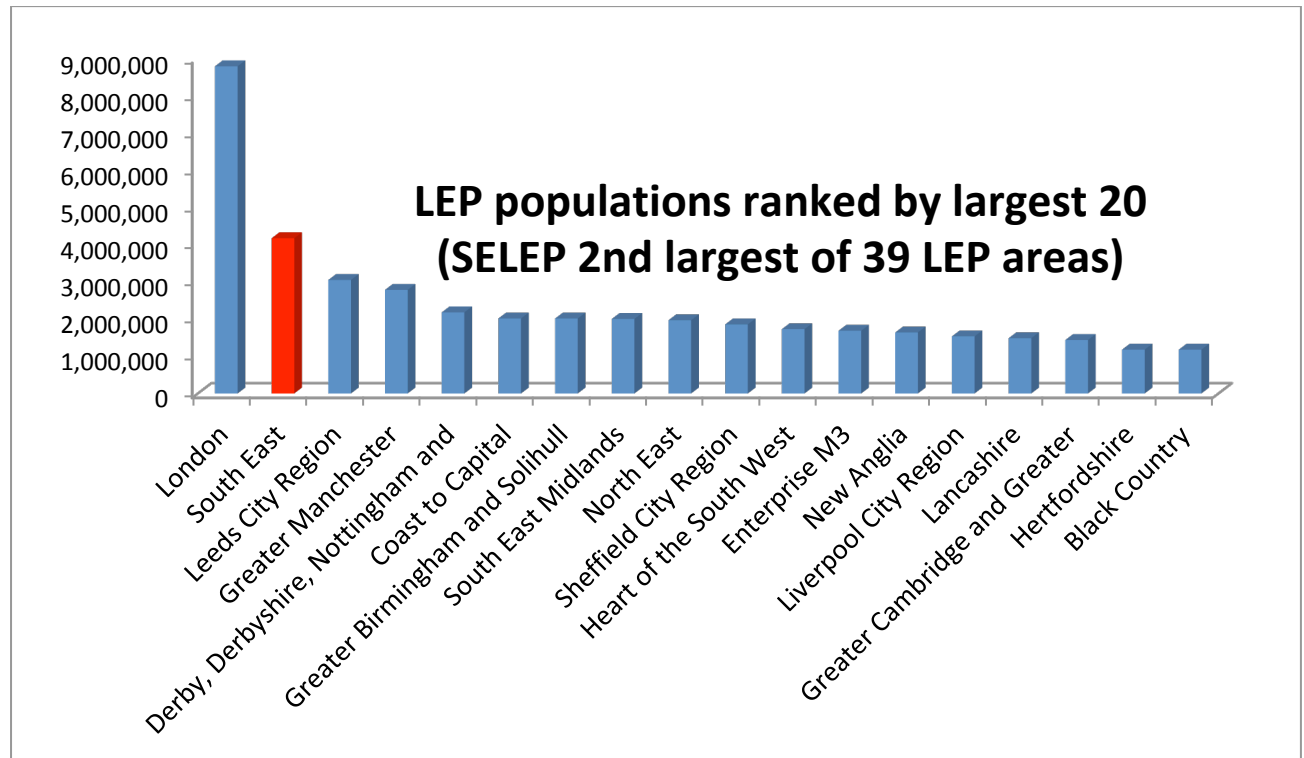




## What is the current population and projected growth?

At 4.1 million, SELEP has a vast population, the largest of all LEPs outside London. The chart below illustrates how significant this is. Fewer than 10 LEP have a population of over 2 million. The smallest 14 LEPs in population terms have populations of less than 1 million.

SELEP will also see considerable population growth, illustrated by the chart below. By 2039, the population is projected to be nearly 5 million. A greater proportion of the population will also be aged 70 plus; 21% compared to 14% in 2014. This clearly has implications for the health and care sectors.



## Sectors: Headlines and Growth

Sector	SELEP Picture Now	Growth / Future
<b>Construction (PRIORITY)</b>	<ul style="list-style-type: none"> <li>27,325 enterprises</li> <li>101,000 employee jobs</li> <li>213,973 employee jobs (construction / related sectors)</li> <li>Ageing workforce</li> <li>Disproportionately male workforce</li> <li>Nearly 6,000 vacancies (including Electricians, plumbers, carpenters, Quantity Surveyors, Bricklayers, Production Managers)</li> <li>Average national salaries include: Production Manager (£46K), Supervisor (£33k), Carpenter (£32k), Quantity Surveyor (£47k)</li> <li>Competition from London offering higher salaries to people trained here</li> </ul>	<ul style="list-style-type: none"> <li>300,000 new homes across SELEP, so sector set to see considerable growth</li> <li>Large infrastructure projects (i.e. Lower Thames Crossing)</li> <li>Growing need for 'green' &amp; low carbon skills and opportunity to establish as area of expertise</li> <li>Public perception hindering growth.</li> <li>Large requirements in 'off site' jobs</li> <li>Carpenters, Joiners, Architects, Project Managers, Plumbers &amp; heating &amp; ventilation engineers and Chartered surveyors identified by UKCES as jobs of the future</li> <li>Brexit impact as large migrant workforce</li> <li>Trend towards pre-fabricated housing speeding up construction</li> </ul>
<b>Health and Care (PRIORITY)</b>	<ul style="list-style-type: none"> <li>7,240 enterprises</li> <li>220,000 employee jobs</li> <li>Disproportionately female workforce (particularly in care)</li> <li>Over 45,000 vacancies (including Nurses, care workers, medical practitioners, social workers and care managers)</li> <li>Average national salaries include: Nurse (£35k), Care workers (£20k), Residential home managers (£41k), Social Workers (£41k)</li> </ul>	<ul style="list-style-type: none"> <li>Population growth to 4.6 million by 2030</li> <li>Increasing ageing population – both will impact on health and care needs</li> <li>Public perception of sector (particularly care) hindering recruitment – good opportunity to progress to management</li> <li>Care Workers, Nurses, dentists and nursing assistants identified by UKCES as jobs of the future</li> <li>Potential impact of Brexit as large migrant workforce</li> <li>Opportunities to use digital technologies in care</li> </ul>
<b>IT, Digital &amp; creative (PRIORITY)</b>	<ul style="list-style-type: none"> <li>19,170 enterprises</li> <li>85,000 employee jobs</li> <li>IT has a disproportionately male workforce</li> <li>Over 30,000 vacancies (including Web developers, software developers, IT support, graphic designers)</li> <li>Average salaries include: IT project manager (£57k), IT technician (£34k), programmer (£43k)</li> </ul>	<ul style="list-style-type: none"> <li>Current 'digital revolution' means skills for this sector applies across all other sectors with digital skills needs growing</li> <li>Many hard to fill vacancies in IT and creative likely to be increased by Brexit</li> <li>Programmers &amp; Software developers, IT specialist managers, IT analysts, IT project managers, web designers and developers identified by UKCES as jobs of the future</li> <li>High numbers of micro businesses and freelancers which may require a different approach / support to enter sector</li> <li>Sizeable Games, Entertainment and cultural part of sector likely to see growth</li> <li>Aligning to government plans for Local Digital Partnerships</li> <li>Ensuring local communities are aware of the new digital entitlement</li> </ul>

<b>Finance (PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 3,020 enterprises</li> <li>• 43,000 employee jobs</li> <li>• Strong relationship to London – many SELEP residents commuting to finance jobs</li> <li>• Over 8,000 vacancies (including Insurance underwriters, finance analysts, sales related roles and financial managers)</li> <li>• Average salaries include: Finance and investment analysts (£45k), Pensions and insurance clerks insurance underwriters (£42k), insurance underwriters (£41k)</li> </ul>	<ul style="list-style-type: none"> <li>• Trend for some finance companies in London relocating to parts of SELEP due to available workforce / lower rents</li> <li>• Growing need for IT (software) skills due to online nature of industry – difficult to recruit to</li> <li>• Finance and investment analysts and advisers, chartered and certified accountants, sales accounts and business development managers identified by UKCES as jobs of the future</li> <li>• Potential impact of Brexit on international companies presence in UK, with London as Europe's main financial services hub</li> </ul>
<b>Manufacturing and engineering (PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 108,000 employee jobs</li> <li>• Nearly 12,000 vacancies including mechanical engineer, production manager, engineering manager, test engineer</li> <li>• Disproportionate male workforce</li> <li>• Ageing workforce</li> <li>• Internationally famous companies located here (i.e. Ford, Raytheon, e2v)</li> <li>• Average national salaries include: design and development engineers (£43k) engineering professionals (£33k), mechanical engineers (£38K)</li> </ul>	<ul style="list-style-type: none"> <li>• Public perception of sector hindering recruitment</li> <li>• Ageing workforce likely to impact on skills needed – high need for technical skills</li> <li>• Mechanical Engineers, Metal fitters, production and maintenance fitters identified by UKCES as jobs of the future</li> <li>• Impact of digital and robotics on future skills requirements</li> <li>• Decline in employment forecasts but current shortages and factors such as competition from other sectors / ageing workforce means there is continued need for skilled staff</li> <li>• 2018 is the year of engineering</li> </ul>
<b>Transport &amp; Logistics (PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 6,270 enterprises</li> <li>• 93,000 employee jobs</li> <li>• Disproportionate male workforce</li> <li>• Of national and international significance – SELEP has nine ports, high speed rail links and regional airport capacity</li> <li>• Over 8,000 vacancies including HGV Driver, Forklift Truck driver, warehouse manager, transport manager and depot manager</li> <li>• Average national salaries include: managers in transport distribution (£37k), Warehouse Managers (£36k), LGV Drivers (£26k)</li> </ul>	<ul style="list-style-type: none"> <li>• Impact of digital and robotics on future skills requirements (i.e. automated warehousing)</li> <li>• Aircraft pilots, LGV drivers, train drivers identified by UKCES as jobs of the future</li> <li>• Airport expansion at Gatwick (outside LEP but providing large volume of jobs), Stansted, Southend airports</li> </ul>
<b>Agriculture and land based (Kent &amp; East Sussex PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 6,000 enterprises</li> <li>• 1,000 vacancies including landscaper, veterinary nurse and farm estate worker</li> <li>• Average national salaries include farmer (£44k), veterinary nurses (£24,495)</li> <li>• A rich and diverse food production / manufacturing sector showcasing innovations and importance of food security – linked to tourism</li> </ul>	<ul style="list-style-type: none"> <li>• Important to food security and potential move to more UK production if imports become costly</li> <li>• Innovations in areas such as wine production could lead to further growth</li> <li>• Farmers UKCES jobs of the future</li> <li>• Growing need for farm based R&amp;D and response to climate change</li> </ul>
	<ul style="list-style-type: none"> <li>• 11,495 enterprises</li> </ul>	<ul style="list-style-type: none"> <li>• Impact of online retail</li> </ul>

<b>Retail</b>	<ul style="list-style-type: none"> <li>• 276,000 employee jobs (NB includes wholesale and repair also)</li> <li>• 11,000 vacancies including store manager, sales executive and retail sales person</li> <li>• Average national salaries include sales assistants (£21k), cashiers (£18k), retail managers (£28k)</li> </ul>	<ul style="list-style-type: none"> <li>• Heavy reliance and inter-relation with transport and logistics sector</li> <li>• UKCES identifies IT skills associated with sector, such as business analysts as jobs of the future</li> </ul>
<b>Education (PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 2,935 enterprises</li> <li>• 156,000 employee jobs</li> <li>• 33,000 vacancies including secondary education teaching professionals, teaching assistants, primary and nursery education teaching professions</li> <li>• Reported difficulties recruiting and people leaving sector</li> <li>• Average national salaries include secondary education teachers (£31k), FE teaching professionals (£35k) &amp; teaching assistants (£17k)</li> </ul>	<ul style="list-style-type: none"> <li>• Largely public sector so reliant on public funding</li> <li>• UKCES identifies Secondary School Teachers and educational support assistants as jobs of the future</li> <li>• General challenge in schools, colleges and universities to recruit to sector specialism especially where there are shortages in the sector itself. Essential to explore industry placements and support to address this.</li> </ul>
<b>Professional, scientific &amp; technical (cross cutting) PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 27,950 enterprises</li> <li>• 110,000 employee jobs</li> <li>• Reflecting the high level of technical and higher level jobs across SELEP</li> <li>• Reflects jobs in some of sectors as above such as IT, construction and also legal</li> <li>• Over 9,000 vacancies including Solicitors, legal professionals and legal secretaries</li> <li>• Average national salaries include Solicitors (£45k), Vets (£40k) and legal professionals (£45k)</li> </ul>	<ul style="list-style-type: none"> <li>• Technical roles are increasing as reflected in the sectors described above and are reflected in UKCES jobs of the future as well as legal and medical roles</li> <li>• Factors such as climate change and exploring new approaches to areas such as crop growth could be an area for expertise and expansion</li> </ul>
<b>Energy &amp; Utilities (PRIORITY)</b>	<ul style="list-style-type: none"> <li>• 18,000 employee jobs</li> <li>• 1,600 vacancies including water and sewerage operatives, engineering technicians and business sales executives</li> <li>• Average national salaries include £29,000 for water and sewerage operatives and £30,000 for engineering technicians</li> </ul>	<ul style="list-style-type: none"> <li>• The sector reports requirements in engineering and experiences similar shortages to the engineering sector</li> <li>• UKCES identifies needs for technical skills and notes that in future there will be increasing skills requirements for the expansion of intelligent energy systems that track usage as well as installation of energy technologies such as solar &amp; wind.</li> </ul>
<b>Accommodation, Food &amp; Hospitality &amp; tourism (PRIORITY Kent, Medway, East Sussex)</b>	<ul style="list-style-type: none"> <li>• 112,000 employee jobs</li> <li>• 8,615 enterprises</li> <li>• Nearly 6,000 vacancies including restaurant manager, bar staff, hotel manager</li> <li>• Average salaries include £28,000 for a Restaurant Manager, £20,000 for a Chef &amp; £30,000 for a Hotel Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Current and future trends include the development of companies such as Airbnb changing the nature of the sector</li> <li>• Growth across the SELEP area has seen an increase in new restaurants, hotels and bars in many areas</li> <li>• Likely to be impacted by Brexit and potential reduced workforce. Sector has campaign to recruit more UK workers</li> <li>• Potential impact of climate change</li> <li>• Language skills important and require nurturing</li> <li>• A high employment turnover rate</li> <li>• Links to agriculture and land-based</li> </ul>

## Future developments influencing these sectors

Clearly there is a lot about the future which will impact SELEP's sectors which cannot be predicted. However, there are a range of certainties in terms of forthcoming investments which will have skills and jobs implications across the area. Some key examples are:

Development / investment	Further information
<b>Public Health England</b> relocation to Harlow (Essex) from 2019	Jobs to include Scientists, engineers, researchers, Scientific support workers, finance, HR, IT analyst and marketing roles. These will include graduate and post graduate roles, PHD studentships, entry level roles and apprenticeships. Recruitment is expected to take place from academia, industry and the NHS.
<b>Bradwell Power Station</b> (Essex) new build (pre-planning stage only)	Jobs would be in engineering, construction, planning
<b>Amazon Fulfilment Centre</b> location (Tilbury, Thurrock) – recently opened and still recruiting (2017)	1500 jobs including Control Systems Engineer, Senior Control System Engineer, maintenance technician and health and safety manager
<b>Lower Thames Crossing</b> (Essex, Southend, Thurrock and Kent) (timings to be confirmed)	Expected to generate up to 25,000 new jobs in construction and engineering
<b>Cross Rail Essex routes</b> – to 2020	Generating a share of 50,000 jobs which were projected for London and the south east
<b>Harlow Enterprise Zone</b> (Essex)	2,500 jobs, growing to 5,000 over 25 years
<b>Southend Airport Growth</b>	Up to 7,000 new jobs to 2020
<b>Stansted Airport</b> (Essex) <b>growth</b>	Up to 10,000 new jobs to 2030
<b>Port of Tilbury</b> (Thurrock) <b>growth</b>	Up to 5,500 jobs at London distribution Park and Tilbury sites
<b>London Gateway</b> (Thurrock)	One of Europe's biggest logistics parks and growing
<b>Wind farms</b> (Greater Gabbard, Gunfleet Sands, London Array, East Sussex coast)	Maintenance (Engineering) skills likely to continue to be needed
<b>Better Queensway Development</b> (Southend)	£320 million regeneration in Southend over next 15-20 years
<b>Up to 300,000 new homes to 2030 across SELEP area</b>	Large numbers of jobs in construction and engineering. Sites including: <ul style="list-style-type: none"> <li>• Ebsfleet Garden City (Kent)</li> <li>• Otterpool Park Garden Town (Kent) houses and commercial land</li> <li>• New garden town on Essex-Hertfordshire border</li> <li>• Dunton Hills in Essex (to include new schools and shopping facilities)</li> <li>• Wealden Housing developments to 2028</li> </ul>
<b>Discovery Park</b> (Sandwich, Kent)	Up to 3,000 new jobs
<b>Elwick Place Development</b> Ashford (Kent)	Development requiring construction and engineering jobs. Leisure and hospitality jobs to be created
<b>Sittingbourne Town Centre regeneration</b> (Kent)	Development requiring construction and engineering jobs. Hotels, cinemas and shops to create retail and hospitality jobs
<b>London Entertainment resort</b> (previously Paramount) – plans only	Large scale entertainment resort would require construction and engineering skills and once up and running, large numbers of hospitality jobs

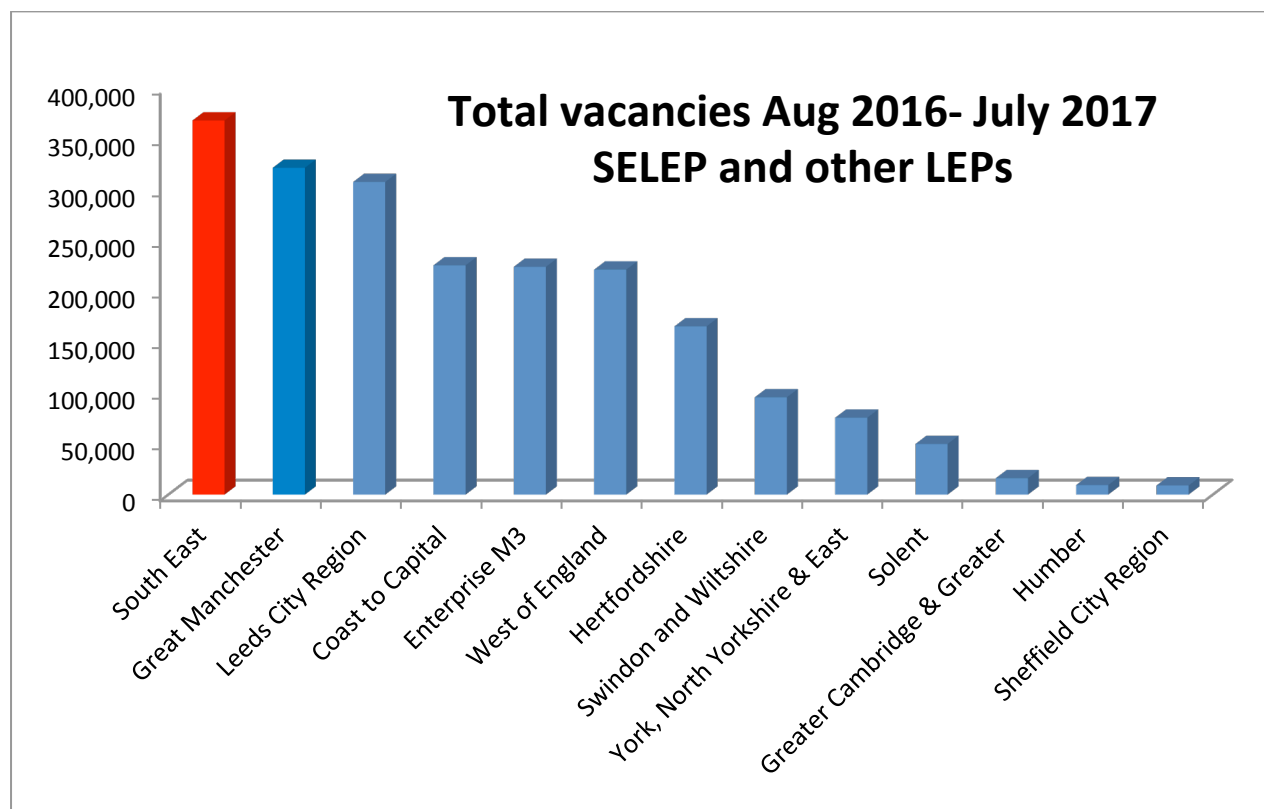
<b>Growth of Gatwick Airport</b>	Continuing jobs for people living in East Sussex and Kent
<b>Swallows Business Park (Hailsham, East Sussex)</b>	Over 500 new jobs
<b>North Bexhill Access Road</b>	Development opening up land for the development of 38,000 sqm of new employment space and the creation of over 2200 jobs
<b>Lewes North Street Quarter</b>	£180m development on brownfield site to include public spaces, off street parking, employment space and a healthcare hub
<b>Devonshire Park (Eastbourne)</b>	£44m project to deliver new welcome building, theatre and gardens
<b>Queensway Gateway Road</b>	New road to reduce congestions on the Ridge and open up land along a corridor between Hastings and Bexhill for business investment and housing development
<b>Hastings Harbour Quarter project plan</b>	£500m project to regenerate Hastings seafront creating jobs, homes and a working marina for up to 600 vessels. Construction and jobs based at the marina as well as 1,300 homes.
<b>Newhaven Enterprise Zone</b>	Made up of eight sites covering 79 hectares and focusing on advanced manufacturing, engineering and 'clean, green and marine' sectors linked to Rampion Offshore Wind Farm (Operations and Maintenance Base currently under construction).
<b>Eastbourne Arndale Centre Retail / Leisure development</b>	£80m re-development in Eastbourne creating 22 new retail units, approximately 300 extra car-parking spaces, 7 restaurants and a cinema.
<b>Potential High Speed One from Ashford to Hastings</b>	High speed rail link between London St Pancras, Hastings, Bexhill and Rye via Ashford International – proposed by government
<b>South Essex Vision 2050</b>	Ambitions for growth including housing, business and leisure development to ensure the right conditions for growth

## How many vacancies have there been and in which sectors?

The Office for National Statistics (ONS) and Organisation for Economic Co-operation and Development (OECD) use vacancies as a real-time measure of skills shortages and requirements. The OECD states that *'the use of vacancy data and of real time job market information is playing an increasingly important role within the available set of tools to monitor and measure skills shortages in the labour market'*. It should be noted that they are one measure only and will not capture activity such as innovation and business start-up.

SELEP has had nearly 370,000 job postings in the period August 2016-July 2017. The chart below illustrates the scale of this in comparison to other LEP areas. The following charts break down the vacancies in terms of occupations, skills sought and industries advertising. They illustrate a strong level of need in the sectors identified above such as health, care, IT & digital, manufacturing, finance, logistics and construction and again endorse the focus on these sectors. As per the above, the retail sector also has large numbers of vacancies.

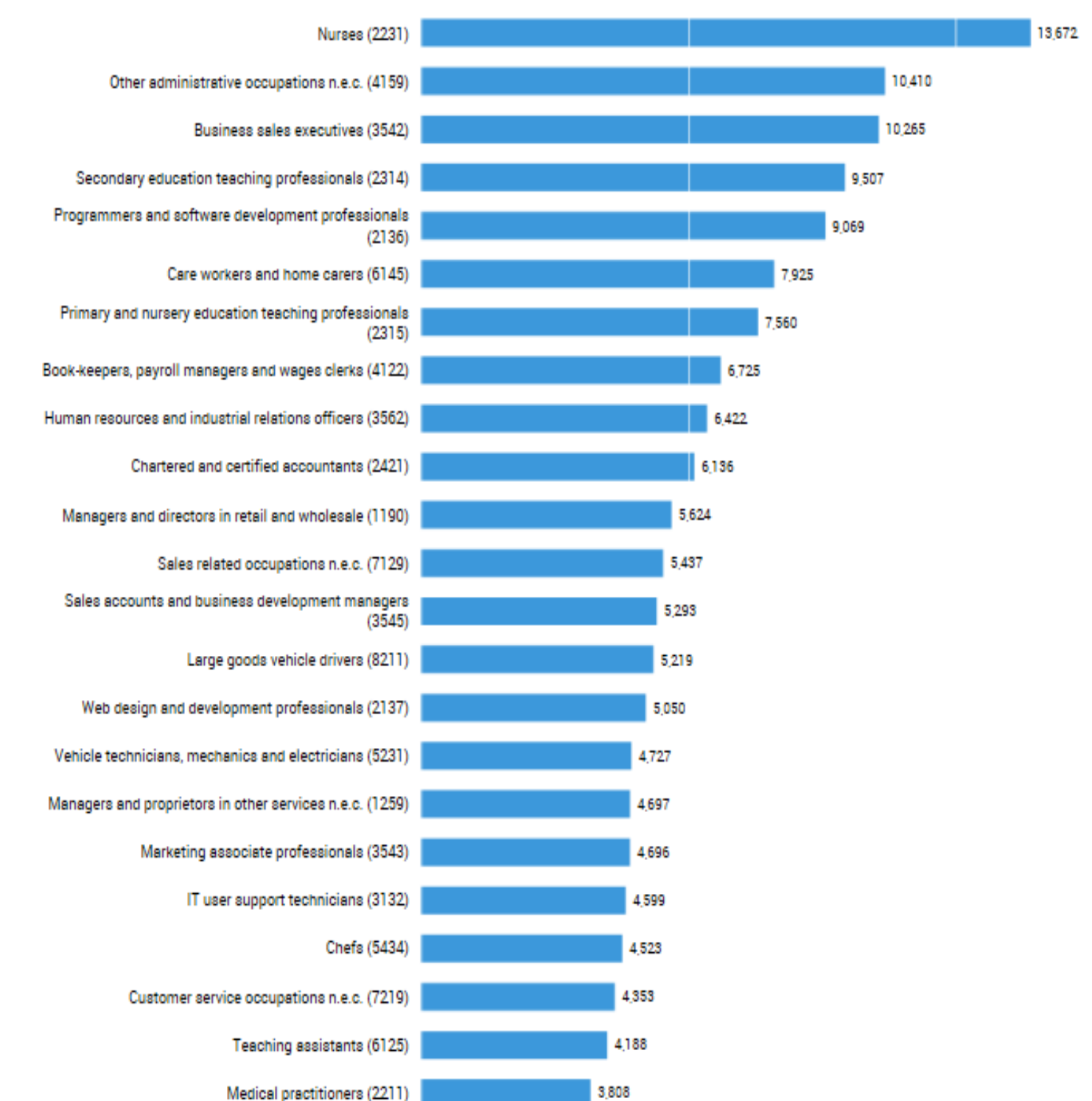
Additionally, the UK Commission for Employment and Skills (UKCES) conducts an annual survey of employers, which captures recruitment requirements, available by LEP area, which is reflected below. This survey is now conducted by the Department for Education, who will publish future results. This illustrates again that many employers (nearly half) are recruiting and require skilled people (45%). Candidates having Maths and English to at least level 2 is seen as critical by 55% of employers as is having a relevant vocational qualification (49%) or work experience (65%). It also highlights that the majority of employers surveyed used commercial training (42%) to meet their requirements and few are offering apprenticeships (9%). Nearly half (48%) saw investing in leadership and management skills as a top priority.



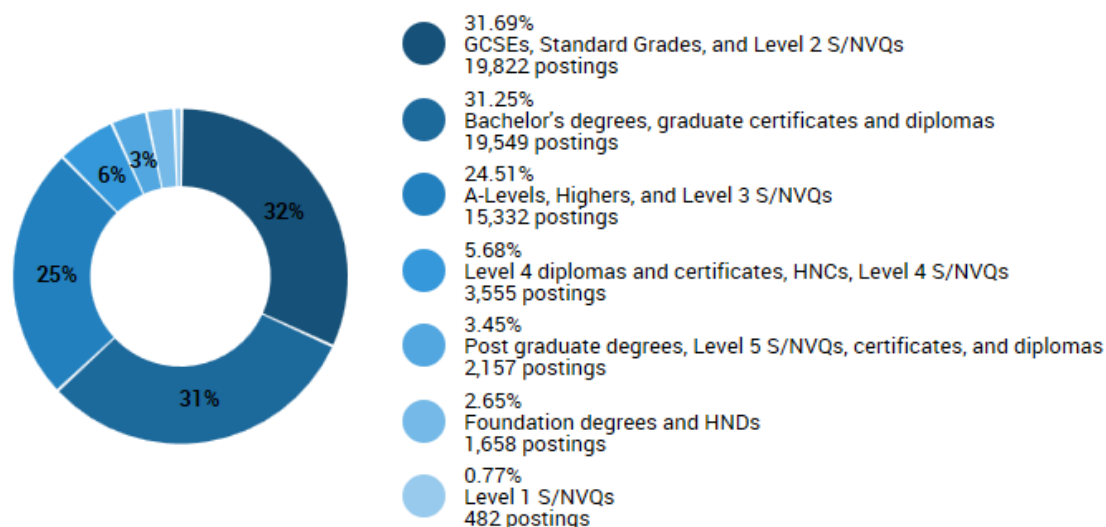


## 367,735 job postings across SELEP (Aug 16-July 17)

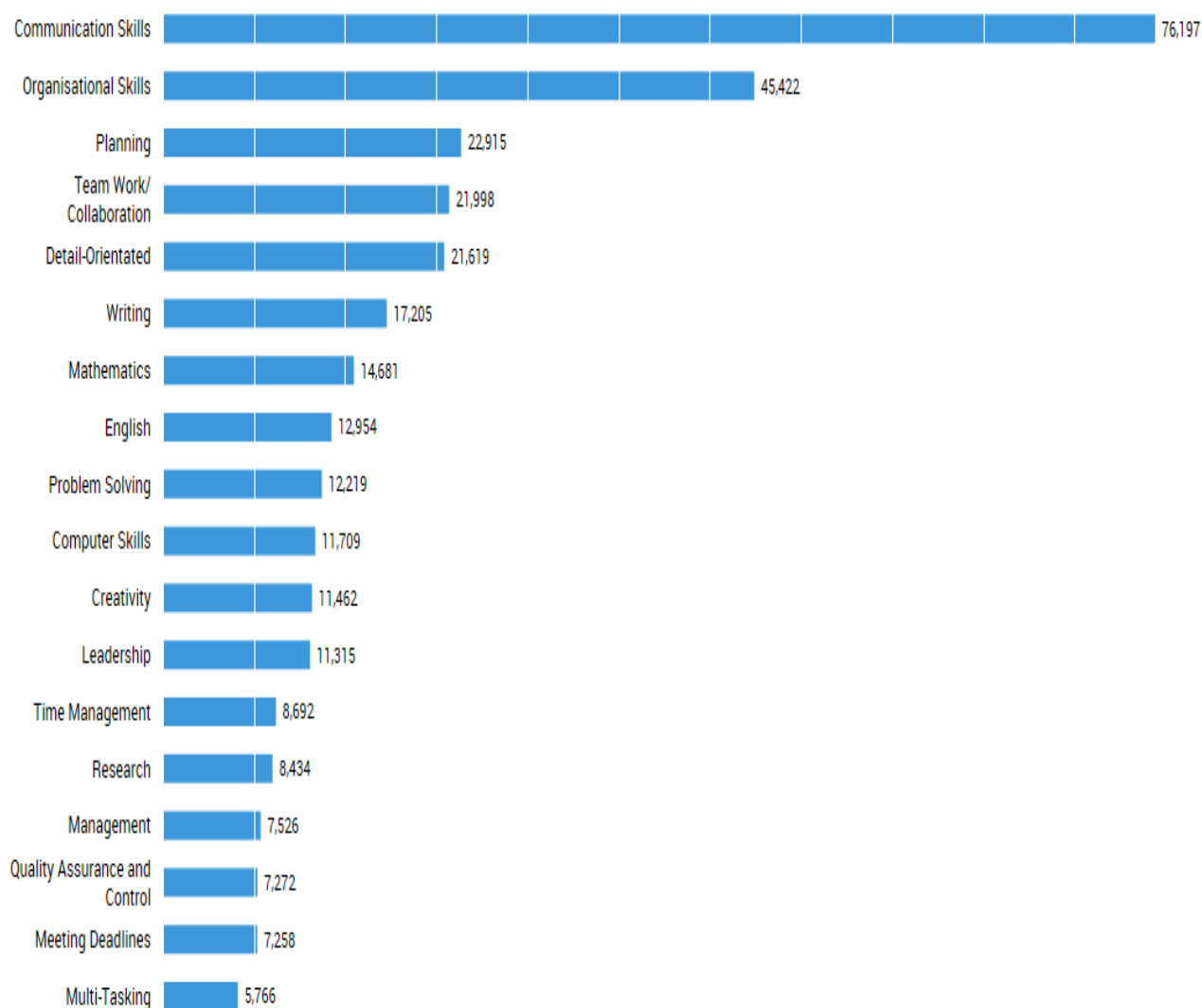
### What were the top occupations advertised?



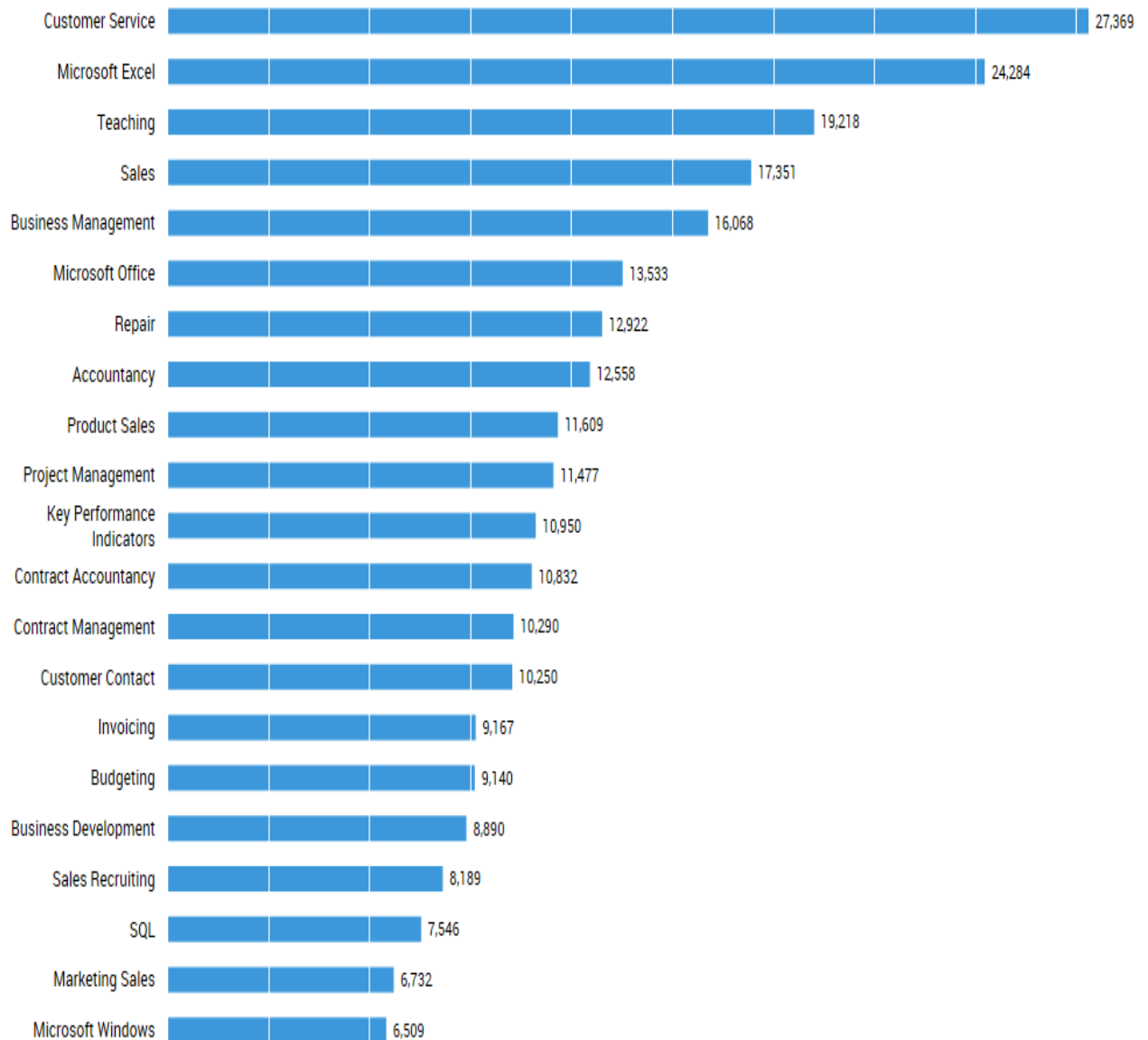
## What level of education were recruiters seeking? (where advertised)\*this applies to 17% of postings only\*\*



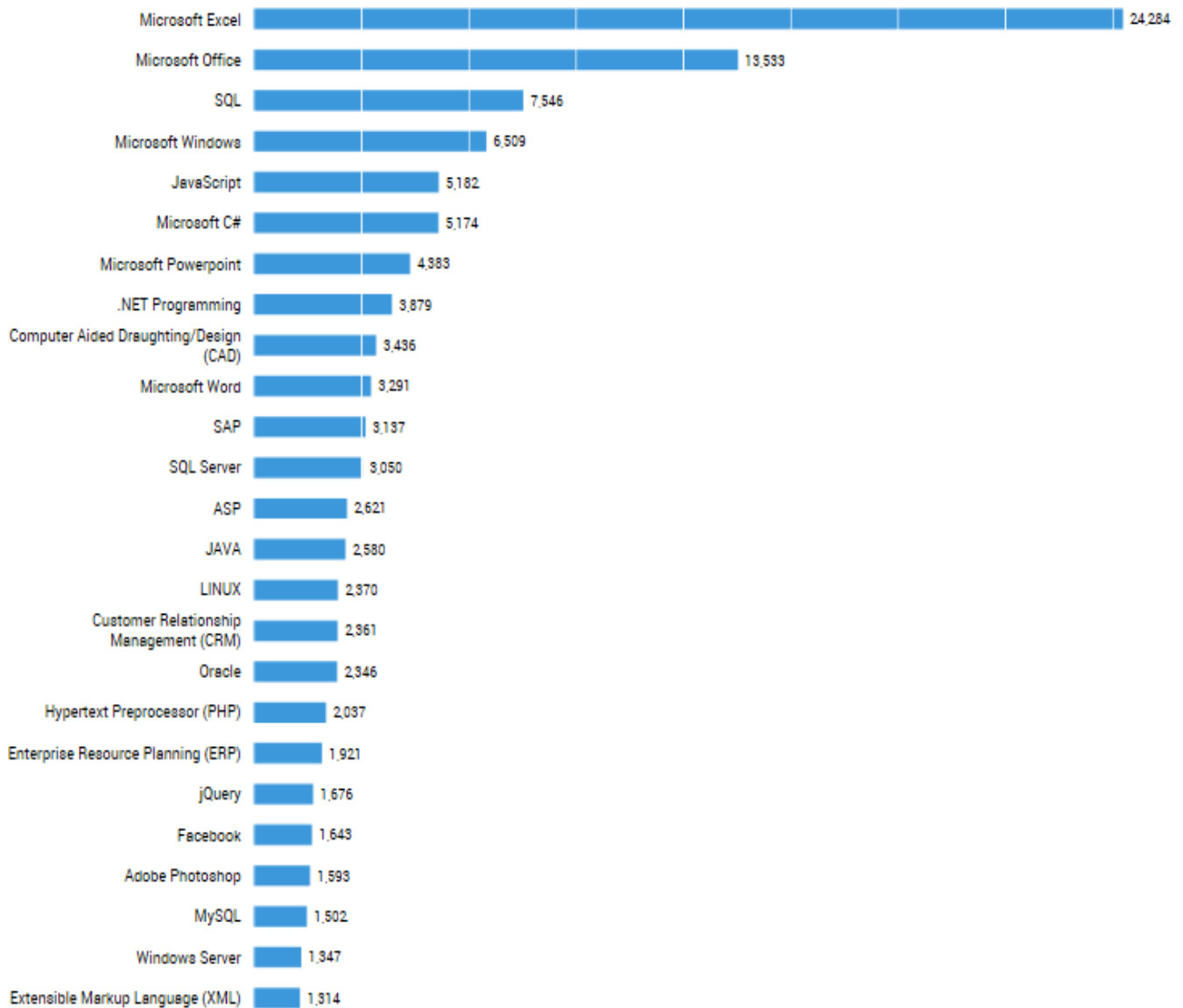
## What skills were recruiters looking for?



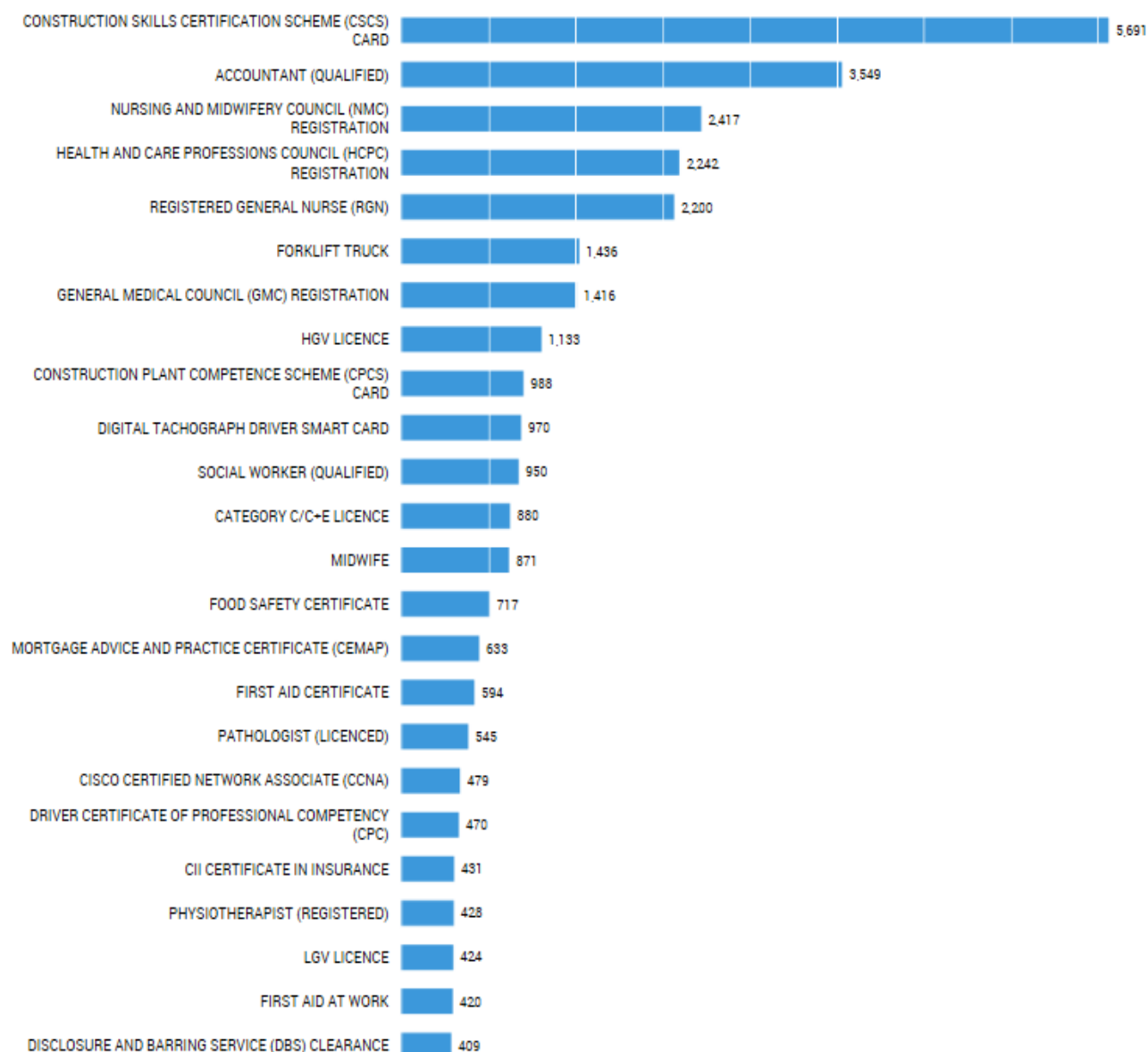
## What specialist skills were recruiters seeking?



## Top Computer and Programming Skills sought in vacancies (applicable to approximately half of all vacancies)



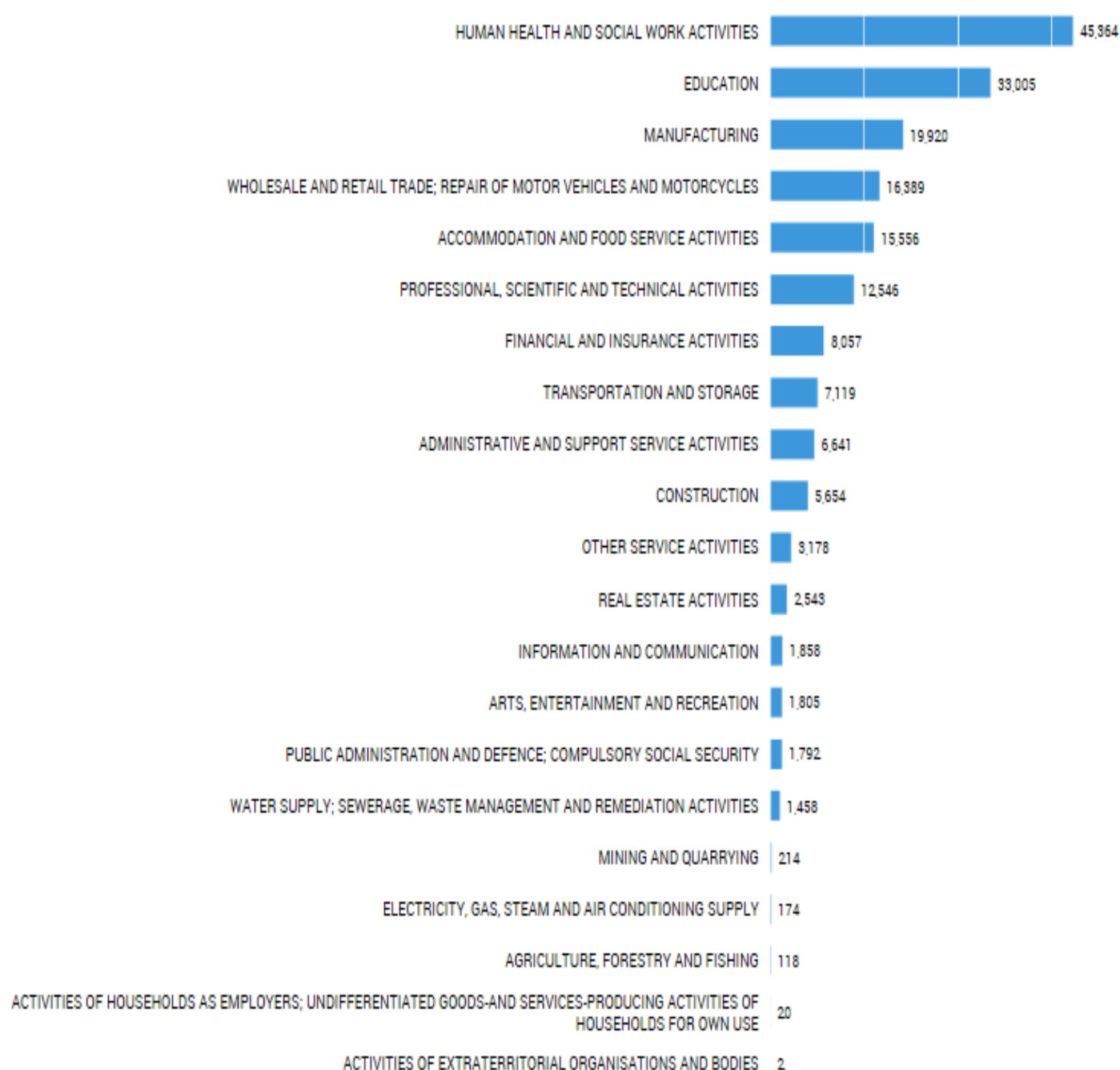
## Top Certifications sought by employers



### Employers with most vacancies across SELEP:

- NHS
- ATTB
- Essex County Council
- Care Com Limited
- Newcross Health Care
- ID Medical Limited
- Tesco
- Shepherd Neame Limited
- University of Kent
- East Sussex County Council
- Uberfluent
- Technology & New Media
- Saga Services Limited
- Coyle Sectors
- Capita PLC
- Prima Ardelle
- Barchester Health Care
- Traditional Pubs
- First Data Limited
- International Financial Data Services
- Travis Perkins
- Canterbury Christ Church University
- Applied Systems Limited
- University of Essex

## Top industries recruiting



## South East LEP: UK Commission for Employment & Skills 2016 (Survey of 672 employers)

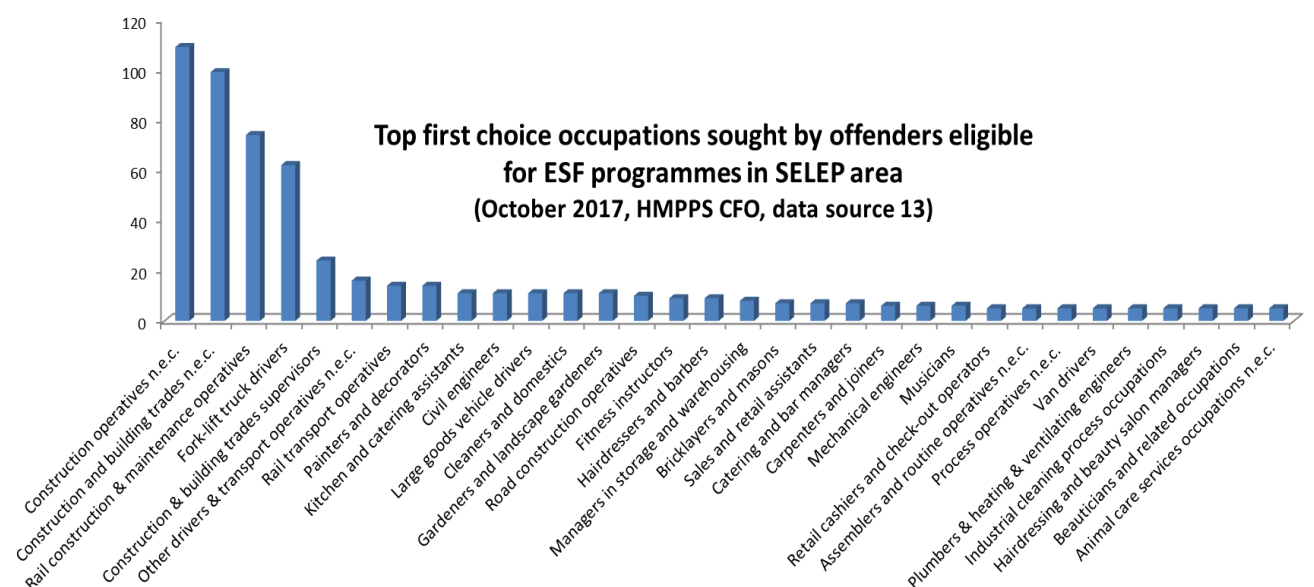
<b>Recruitment</b>	<b>England</b>	<b>SELEP</b>
Had any vacancies for full or part-time staff in the past 12 months	53%	*49%
Recruitment method used in last 12 months: Placed adverts on their website to recruit.	29%	*22%
Recruitment method used in last 12 months: Placed adverts on social media to recruit	24%	*20%
Recruitment method used in last 12 months: Paid someone to place adverts on website/ social media	5%	*4%
Recruitment method used in last 12 months: Used some other form of paid-for recruitment service	24%	21%
Recruitment method used in last 12 months: Used a government recruitment service or scheme	20%	18%
Recruitment method used in last 12 months: school, college or university job fairs or careers services	10%	9%
Recruitment method used in last 12 months: Relied on word of mouth or personal recommendations	42%	39%
Proportion citing that candidates having a particular level of achievement of academic qualifications (e.g. GCSEs, A levels or a degree) is either a critical or significant factor when recruiting	46%	45%
Proportion citing that candidates having Maths and English GCSE to at least level 2 or GCSE A*-C is either a critical or significant factor when recruiting	56%	55%
Proportion citing that candidates having a relevant vocational qualification is either a critical or significant factor when recruiting	49%	49%
Proportion citing that candidates having relevant work experience is either a critical or significant factor when recruiting	64%	65%
Recruited anyone in the last year	49%	*43%
Recruited anyone aged 16-18 in the past 12 months	12%	11%
Recruited anyone aged 19-24 in the past 12 months	28%	*24%
Recruited any young person in the past 12 months	32%	30%
Recruited anyone aged 50+ in the past 12 months	15%	14%
<b>Work experience</b>		
Had anyone in on work experience in the last 12 months	38%	*34%
Offered any work inspiration in the last 12 months	10%	8%
Aware of Government Traineeships	48%	48%
<b>People Development</b>		
Had any skills or training-related issues which required external information, advice or practical help	28%	27%
Whether offered internal training in the last 12 months	62%	62%
Whether offered external training in the last 12 months	47%	45%
Whether offered any training in the last 12 months	73%	72%
Proportion who had used FE Colleges to conduct their training	9%	*6%
Proportion who had used HEIs to conduct their training	5%	3%
Proportion who had used commercial organisations to conduct their training	44%	42%
Whether establishment has worked with another employer to develop skills / expertise in workforce	14%	12%
Offered vocational qualifications in the last 12 months	26%	26%
<b>Apprenticeships</b>		
Whether have any apprentices currently	12%	*9%
Whether currently offer apprenticeships at site	7%	7%
Whether have or offer apprenticeships	19%	*15%
Whether are aware and have a good knowledge of apprenticeships / have or offer apprenticeships	46%	44%
Whether plan to offer Apprenticeships in the future	31%	32%
Whether plan to offer Apprenticeships in the future but don't currently	15%	*18%
<b>Characteristics</b>		
Whether agree that: The ability of our staff to do their job effectively is more important than them having formal qualifications	83%	82%
Whether agree that: We are happy to pay towards staff training and development	63%	65%
Whether agree that: Keeping our staff happy is equally as important as organisation performance	86%	86%
Whether agree that: Investing in management and leadership skills is a top priority for the business	52%	*48%
Whether agree that: We are always looking for new ventures, developments or opportunities	56%	55%



## Prison Data for SELEP area

SELEP's geography has the highest number of prisons of any LEP nationally. It is clearly important to support this cohort into industry relevant training to ensure access to jobs and to meet skills shortages. Some key data on key prisons and prisoners for LEP's area:

### Prisons in SELEP area



## Data sources for this report

- 1) Official Labour Market Statistics: <http://www.nomisweb.co.uk/>
- 2) Working Futures: <https://www.gov.uk/government/publications/uk-labour-market-projections-2014-to-2024>
- 3) Labour Insights (Vacancy data)
- 4) Business Register and Employment Survey (BRES, Office for National Statistics)
- 5) Sector Skills Council data and reports - <http://fisss.org/sector-skills-council-body/directory-of-sscs/>
- 6) ONS Population projections: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections>
- 7) FE Data Library: <https://www.gov.uk/government/collections/fe-data-library>
- 8) UKCES Employer Survey 2016: <https://www.gov.uk/government/publications/employer-perspectives-survey-2016>
- 9) UK Business by Size and Location: <https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/ukbusinessactivitysizeandlocation/previousReleases>
- 10) Apprenticeship Vacancies, Education and Skills Funding Agency (National Apprenticeship Service)
- 11) Local authority housing plans
- 12) HM Prison and Probation Service
- 13) HM Prison Service Co-Financing Organisation for ESF *(The data used pertains to offenders who are eligible for ESF programmes and have been enrolled on the HMPPS CFO programme due to the offenders' specific needs. Therefore, the data is not reflective of the HMPPS offender population and should not be used as official HMPPS/MoJ statistics).*