

The Marches

LEP REPORT



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About Emsi

Economic Modelling Specialists International (Emsi) creates tools and services that help organisations better understand the connection between economies, people and work. Through our unparalleled local and granular economic data, we are now working with more than 100 colleges, universities and LEPs across the country, giving them the understanding they need in order to close skills gaps, drive growth, and increase productivity in their local economy.

Foreword

The central role of LEPs – determining local economic priorities, driving economic growth and helping to increase regional productivity – all require that you have a thorough understanding of your regional economy. One of the methods at your disposal to help you acquire this understanding is of course Labour Market Information (LMI).

There is a wealth of publicly available data sources available, but there are numerous problems associated with using them. To begin with, not one dataset out there gives a complete picture of the labour market. Secondly, all datasets contain strengths, weaknesses, and data suppressions. And thirdly, attempting to use the raw data is a hugely time-consuming and resource-consuming activity.

Most LMI solutions can help overcome the first and the third problem, by combining different datasets into one system. However, this still doesn't overcome the second problem – that of weaknesses and data suppressions. Since these problems and gaps in the data tend to occur at the 3 and 4-digit industry and occupation levels, what most LMI solutions tend to do is to make assumptions about the granular levels based on the data and trends at the more generic levels. This approach is bound to lead to erroneous conclusions, since many of the industries and occupations at the 3 and 4-digit level are quite different from one another and are highly unlikely to have been growing or declining at the same rate (for example, within the 2-digit Leisure, Travel and Related Personal Service Occupations, there are such disparate occupations as Travel Agents, Caretakers, Hairdressers and Barbers, and Sports and Leisure Assistants). The same errors will occur if assumptions are made at the geographical level, as regions are made up of sub-regions which are often far from homogenous.

At Emsi we take a different approach. Rather than taking public datasets and making broad assumptions, we economically model them together using a technique developed over many years, which allows us to retain the strengths and discard the weaknesses of each source. What we end up with is a dataset that gives a detailed and accurate picture not only of regional labour markets, but also of the sub-geographies within, right down to the most specific industries and occupations.

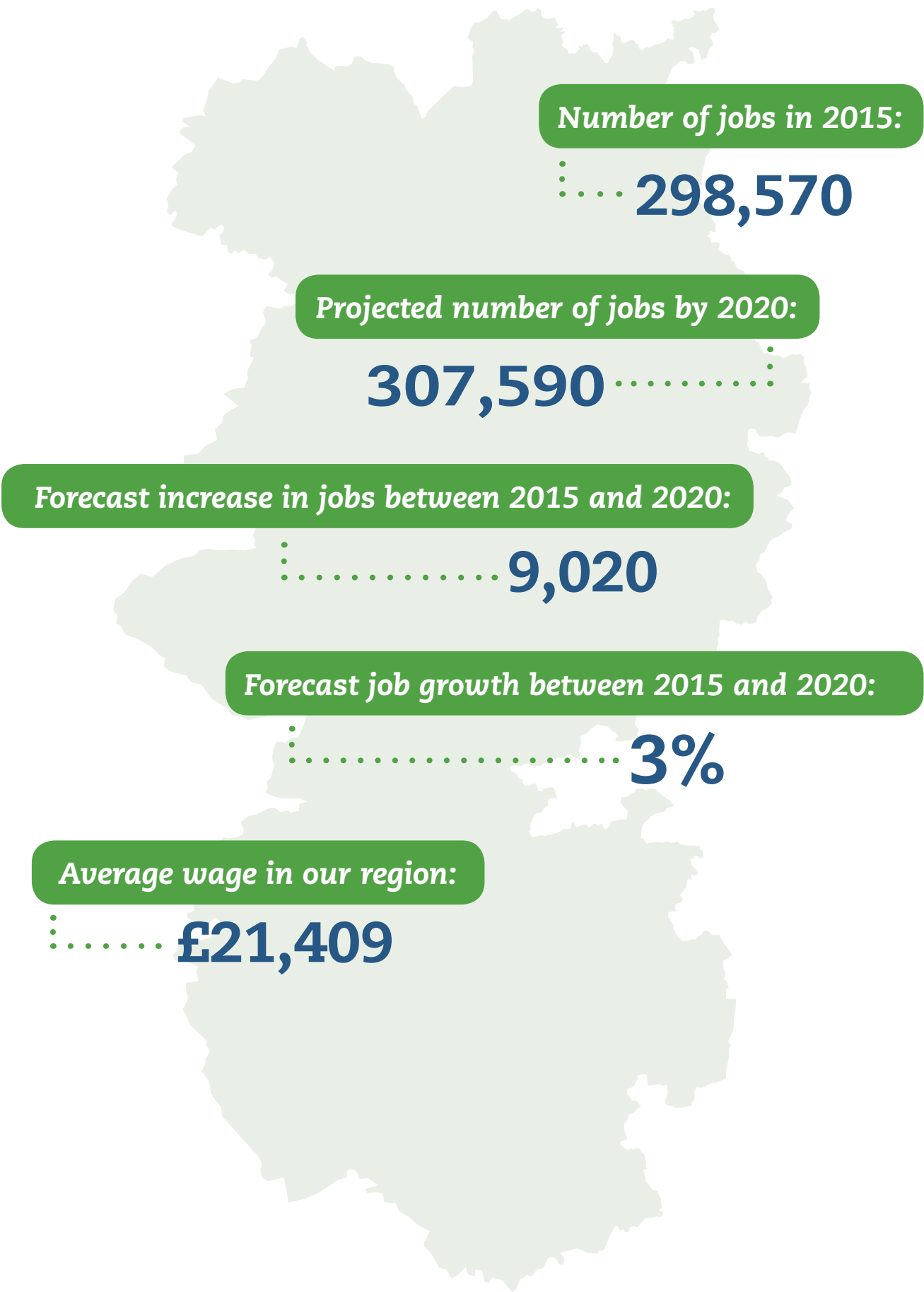
The intent of this report is to give you a flavour of this data, tailored specifically to your region. Some of the highlights of the data in this report are:

- Granular data (4-digit) on occupations and industries throughout
- A look at the industries and occupations which make your region unique
- A look at the occupational make up of the most unique industry in your region

This kind of granular data can go a long way to helping you better understand what industries, occupations and skills are driving your region. In turn, this can help you in a number of ways, including better defining your region's economic priorities, formulating a more effective growth strategy, and encouraging inward investment into your region.

Our goals are very similar to yours: you are looking to drive growth and increase productivity in your region; we produce granular data that is designed to give organisations such as yours the knowledge and understanding you need to be able to more effectively drive growth and increase productivity in your region. We hope that this report will be of use and of interest to you as you strive to meet your goals.

Overview of our region's economy



High level overview of our region's industries and occupations

Top 5 high level industries

Industry	2015 Jobs	2020 Jobs
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	54,153	55,394
Manufacturing	38,719	37,917
Human Health and Social Work Activities	38,517	40,741
Education	27,295	26,877
Accommodation and Food Service Activities	19,536	21,312

Top 5 high level occupations

Occupation	2015 Jobs	2020 Jobs
Professional Occupations	47,630	49,371
Elementary Occupations	44,297	45,905
Skilled Trades Occupations	34,313	34,778
Associate Professional and Technical Occupations	33,294	34,233
Administrative and Secretarial Occupations	32,893	33,744

Top 5 high level growth industries

Industry	Change in Jobs (2015-2020)	% Change
Human Health and Social Work Activities	2,224	6%
Accommodation and Food Service Activities	1,776	9%
Administrative and Support Service Activities	1,741	9%
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	1,241	2%
Construction	1,238	9%

Top 5 high level growth occupations

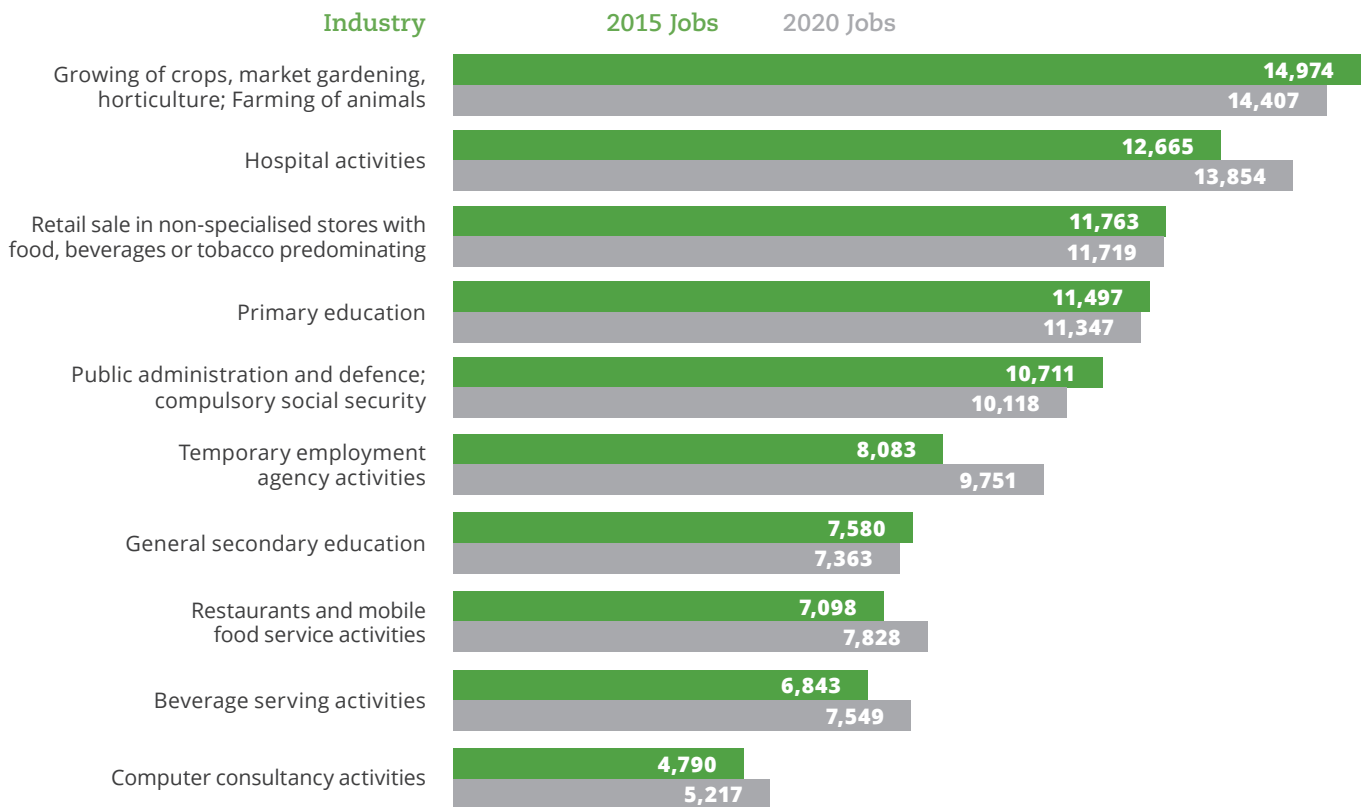
Occupation	Change in Jobs (2015-2020)	% Change
Professional Occupations	1,741	4%
Elementary Occupations	1,609	4%
Caring, Leisure and Other Service Occupations	1,167	4%
Associate Professional and Technical Occupations	939	3%
Managers, Directors and Senior Officials	939	3%



What are our top industries?

A good place to start when trying to understand what is driving your regional economy is to look at which industries are driving employment both in terms of total numbers employed and in terms of future growth. However, simply looking at the headline industries will not tell you an awful lot. To come to a really good understanding of the drivers in your region, it is crucial to drill right down to the most specific industries (4-digit SIC). Our data tool, Analyst, allows users to do just this, and the information below shows both the biggest industries and the highest growth industries in your region, right down to the most granular levels.

Top 10 biggest industries



Top 10 highest growth industries

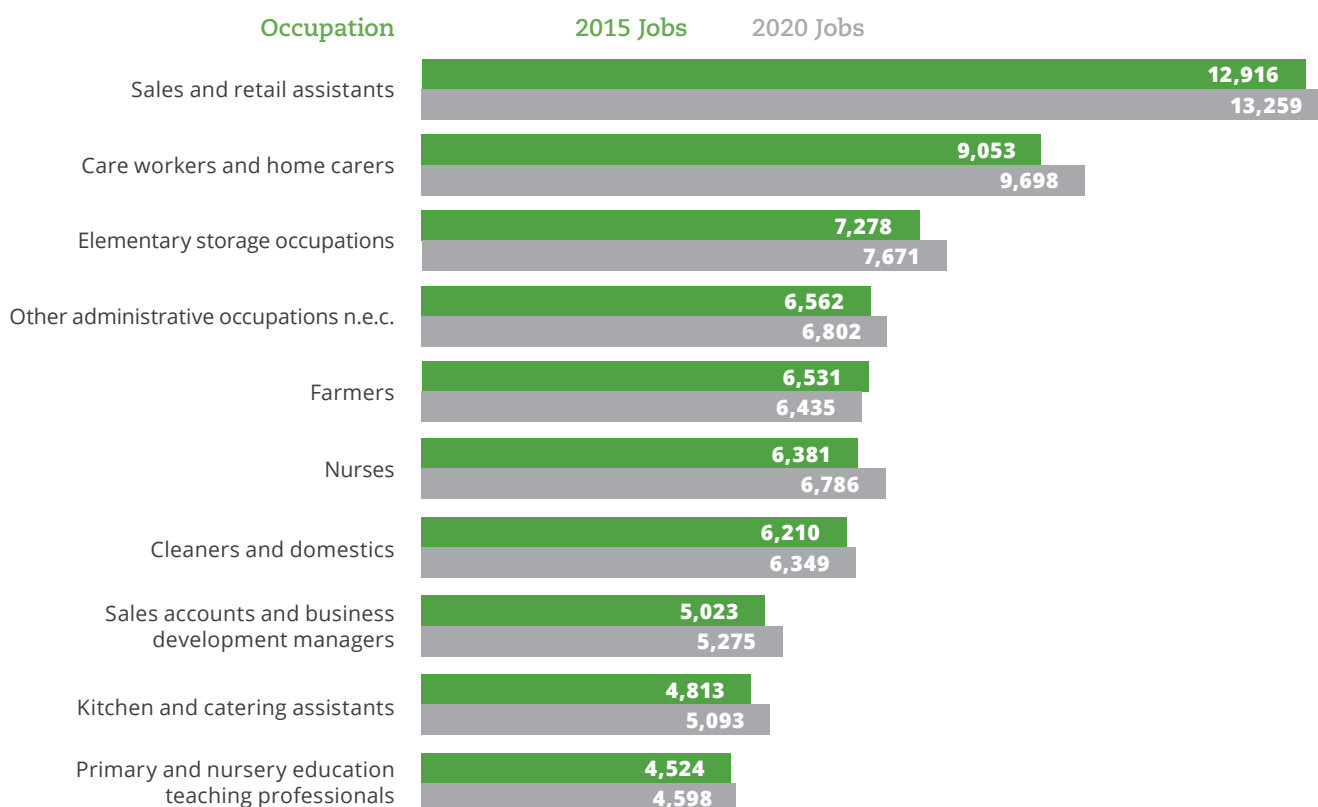
Industry	Change in Jobs (2015-2020)	% Change
Temporary employment agency activities	1,668	21%
Hospital activities	1,189	9%
Restaurants and mobile food service activities	730	10%
Beverage serving activities	706	10%
Computer consultancy activities	427	9%
Construction of other civil engineering projects n.e.c.	421	19%
Social work activities without accommodation for the elderly and disabled	381	12%
Plumbing, heat and air-conditioning installation	363	23%
Other residential care activities	348	10%
General medical practice activities	326	11%

What are our top occupations?



The industry data tells us a good deal, but we also need to look at the local economy through the lens of occupations to see which jobs are driving the regional economy. As with the industry data, our Analyst tool can drill right down to the most granular detail, and so below we have set out the Top 10 occupations in your region both in terms of total numbers employed, and forecasted change to 2020 at the 4-digit SOC level.

Top 10 biggest occupations



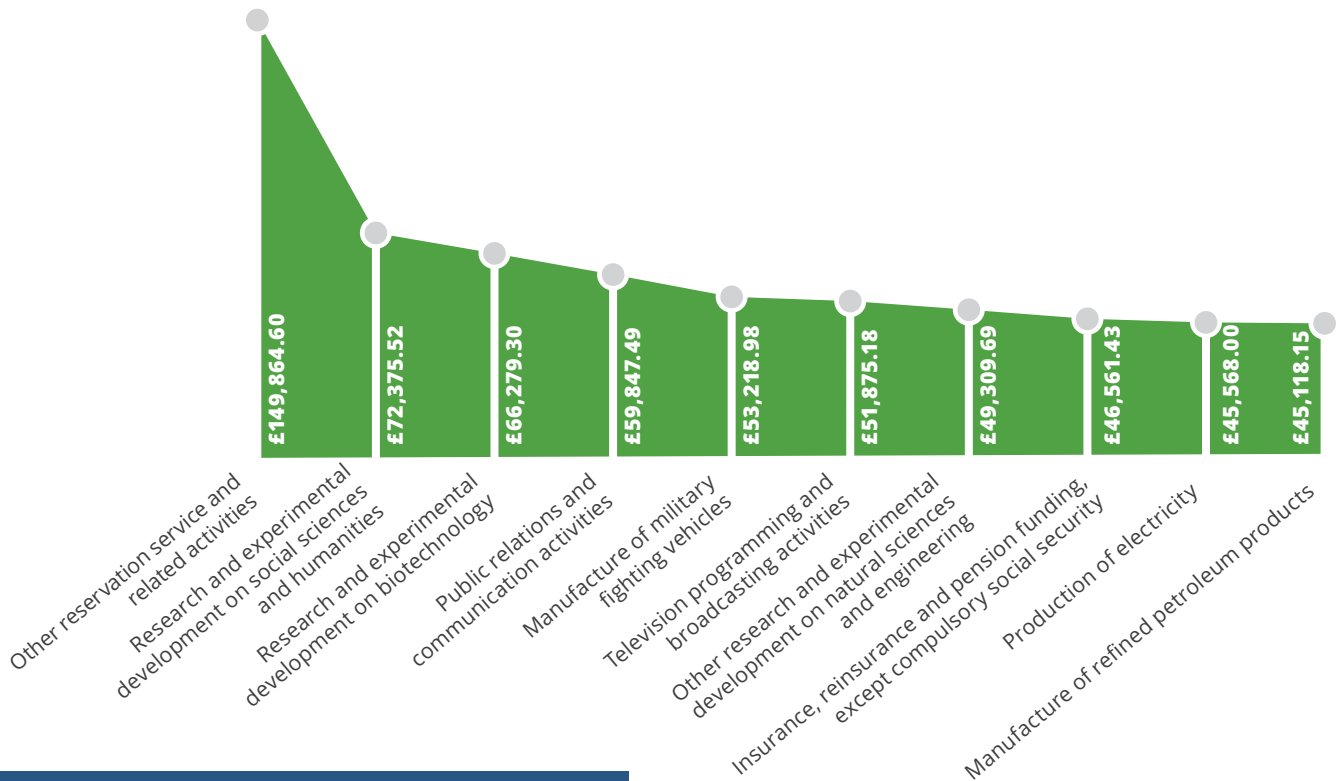
Top 10 highest growth occupations

Occupation	Change in Jobs (2015-2020)	% Change
Care workers and home carers	645	7%
Nurses	405	6%
Elementary storage occupations	393	5%
Sales and retail assistants	343	3%
Kitchen and catering assistants	280	6%
Bar staff	256	7%
Sales accounts and business development managers	252	5%
Nursing auxiliaries and assistants	251	7%
Other administrative occupations n.e.c.	240	4%
Waiters and waitresses	230	7%

What are our highest paying industries and occupations?

Another important aspect of unlocking your region's labour market is to look at how much industries and occupations pay. As with the data presented on previous pages, we have drilled right down to the most granular 4-digit SIC and SOC codes to unlock the highest paying industries and occupations in your region.

Industries – Median annual salary



Occupations – Median hourly wage

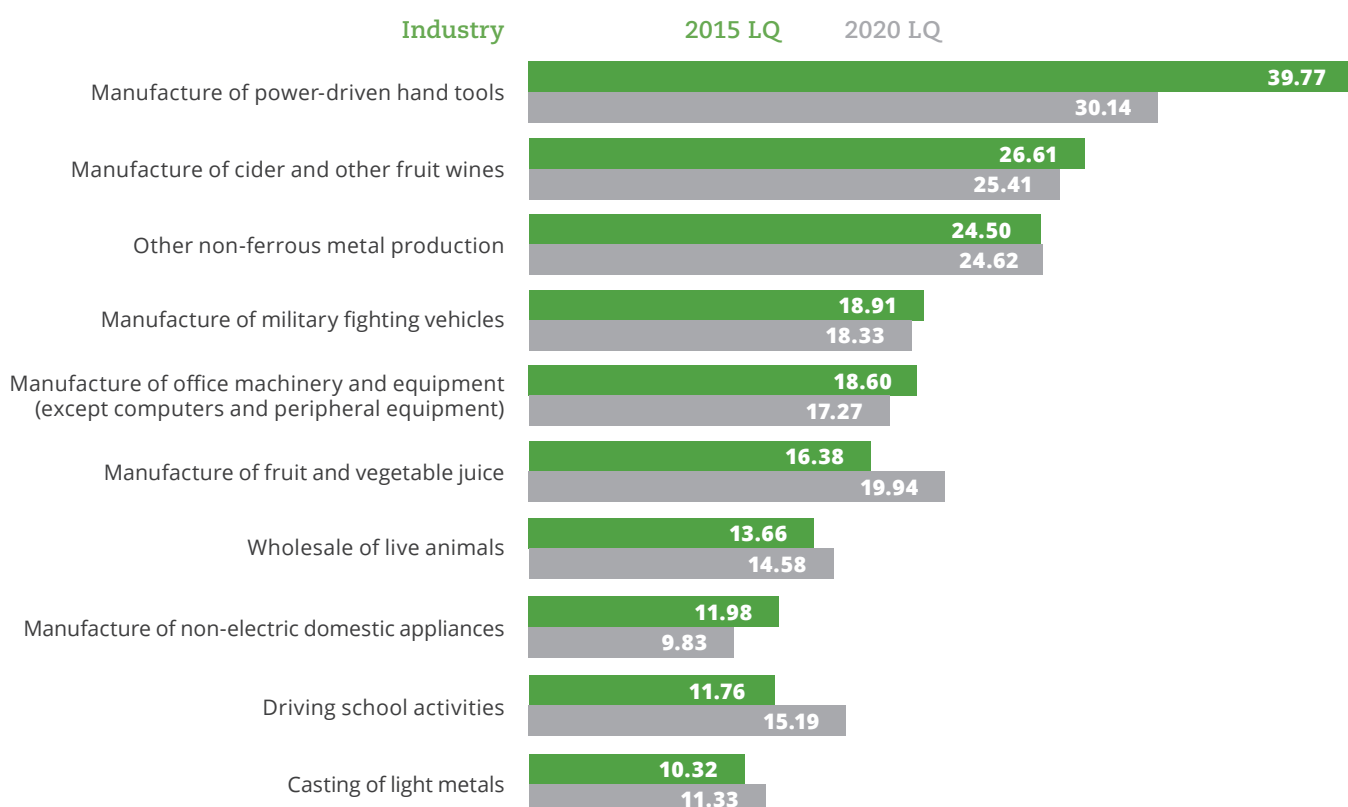


What are our niche industries and occupations?



Where things begin to get really interesting is when we uncover the industries that make your regional economy unique. Our Analyst tool contains a function known as Location Quotient, which is a statistical measure of industry or occupation concentration in an area compared to the rest of the country. Location Quotient works on a benchmark basis, with 1.0 indicating the national average. Therefore, industries and occupations with a score of more than 1.0 indicates that they have an employment profile that is greater than the national average.

Industry Location Quotient



Occupation Location Quotient

Occupation	2015 LQ	2020 LQ
Farmers	4.48	4.44
Horticultural trades	4.28	4.11
Farm workers	4.13	4.08
Managers and proprietors in agriculture and horticulture	3.68	3.54
Driving instructors	3.64	4.04
Rubber process operatives	3.50	4.02
Agricultural machinery drivers	3.32	3.20
Dancers and choreographers	3.28	3.47
Butchers	3.07	3.09
Metal making and treating process operatives	2.88	2.90



What are our most competitive industries and occupations?

We can also measure which industries and occupations make your region unique using a function on *Analyst* called Shift Share. Using this function produces a figure known as Competitive Effect, which is similar to Location Quotient, but rather than measuring uniqueness in terms of total jobs, measures it in terms of job growth. What this figure does, therefore, is to explain how much of the change in a given industry or occupation in your region is due to some unique competitive advantage that the region possesses. Positive numbers denote a positive Competitive Effect, and so the larger the number, the greater the Competitive Effect.

Industry Competitiveness

Industry	Competitive Effect
Temporary employment agency activities	1,141
Beverage serving activities	474
Hospital activities	402
Wholesale of dairy products, eggs and edible oils and fats	250
Construction of other civil engineering projects n.e.c.	243
Artistic creation	218
Service activities incidental to land transportation	209
Performing arts	206
Technical testing and analysis	202
Production of electricity	198

Occupation Competitiveness

Occupation	Competitive Effect
Care workers and home carers	155
Bar staff	154
Elementary storage occupations	98
Large goods vehicle drivers	85
Nurses	70
Nursing auxiliaries and assistants	63
Waiters and waitresses	58
Packers, bottlers, canners and fillers	57
Food, drink and tobacco process operatives	51
Plumbers and heating and ventilating engineers	49

Where are the jobs in our most niche industry?

The data on page 9 showed which industries are most unique to your region, with the Manufacture of weapons and ammunition industry coming on top. However, we might then ask the question, what are the occupations that this sector employs? Through our Staffing Pattern function in Analyst, we can answer this question. The data below gives a breakdown of the Top 10 occupations within the second niche sector – Manufacture of cider and other fruit wines – including numbers employed, employment forecast, hourly earnings and education level (the reason we are using the second niche industry rather than the first, is that there are only a few people employed within the Manufacture of power-driven hand tools sector). The significance of this information is that you can find out quickly and simply what the occupations are in an industry, and therefore the skillset for that sector. It is worth noting that the process can also be run in reverse, whereby users can begin with an occupation (rather than an industry) and run an Inverse Staffing Pattern to quickly identify the industries that employ this position.

Description	Employed in Industry (2015)	Employed in Industry (2020)	Change (2015 – 2020)	% Change (2014 – 2020)	% of Total Jobs in Industry (2015)	Median Hourly Earnings	Education Level
Food, drink and tobacco process operatives	169	177	8	5%	23.4%	£8.50	GCSE at grades A*-C; Level 2 NVQ; BTEC Level 2
Customer service occupations n.e.c.	107	113	6	6%	14.8%	£8.86	GCSE at grades A*-C; Level 2 NVQ; BTEC Level 2
Mechanical engineers	86	95	9	10%	12.0%	£21.29	Honours, Bachelor's degree; BTEC Level 6
Production managers and directors in manufacturing	82	89	7	9%	11.4%	£18.34	Honours, Bachelor's degree; BTEC Level 6
Packers, bottlers, canners and fillers	54	57	3	6%	7.5%	£7.25	GCSE at grades D-G; Level 1 NVQ; BTEC Introductory / Level 2
Fork-lift truck drivers	53	57	4	8%	7.4%	£9.73	GCSE at grades A*-C; Level 2 NVQ; BTEC Level 2
Property, housing and estate managers	44	46	2	5%	6.1%	£15.75	A Levels; Level 3 NVQ; BTEC Level 3
Planning, process and production technicians	41	45	4	10%	5.7%	£14.07	A Levels; Level 3 NVQ; BTEC Level 3
Electricians and electrical fitters	41	43	2	5%	5.7%	£13.51	A Levels; Level 3 NVQ; BTEC Level 3
Managers and proprietors in agriculture and horticulture	27	29	2	7%	3.8%	£13.48	A Levels; Level 3 NVQ; BTEC Level 3



To find out more about how Emsi can help your organisation
build a better regional economy, contact:

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