DORSET
Local Enterprise Partnership

DORSET
PEOPLE & SKILLS STRATEGY EVIDENCE BASE

WWW.DORSETLEP.CO.UK

Table of Contents

Note that this analysis was undertaken prior to the coronavirus pandemic having a significant impact in the UK and is not exploring the significant economic disruption that has occurred as a consequence. All data and analysis should be interpreted in that context.

Summary of findings

This report explores the state of the labour market in Dorset and the skills and workforce demand and supply within the local economy, following the published governmental guidance. It provides the evidence base and highlights key issues to the **Dorset Skills Advisory Panel and Board** and the emerging **Dorset People and Skills Plan**. This work aims to inform the delivery of skills and support economic growth while also facilitating the implementation of the **People** aspirations outlined in the **Dorset Local Industrial Strategy.**

The key findings emerging from the data analysis to date are highlighted below:

Economic Context

- **Engagement and Productivity** - In broad terms, the Dorset labour market has displayed similar characteristics to the wider UK economy over the past decade. The recovery from the previous recession was a period of relatively slow output growth but a relatively robust labour market when measured by 'engagement'. That is, employment levels remained high and unemployment levels did not increase markedly. One of the consequences of this was that labour productivity initially declined over several years (in absolute terms) and has subsequently struggled to recover to pre-recession levels. This has given rise to the concept of the 'productivity conundrum', with a continued policy focus on understanding why productivity growth continues to be muted in historical terms – see Labour Market Indicators – Engagement section.

[1]Skills Advisory Panel Analytical Toolkit – DfE, 2018 https://www.gov.uk/government/publications/skills-advisory-panels-analytical-toolkit

- **Employment** – Prior to the pandemic, many measures of labour market engagement in Dorset LEP have been at historical highs: employment rates were higher than the UK average, and unemployment rates lower (although not necessarily in all areas). The labour market exhibited the features of 'near full employment', which means that businesses were unable to draw on a significant pool of unused labour resource when recruiting and retaining into roles – particularly skilled/technical positions - see Labour Market Indicators – Engagement section.

- **Earnings** - The evidence suggests that earnings differ significantly within Dorset LEP. This is in terms of geography – differences in typical wages between areas – but also between individuals showing significant variance in the distribution of earnings. There are estimates that a significant proportion of the workforce earn below the National Living Wage. The evidence also suggests that a gender pay gap may also exist within the Dorset LEP area, particularly for full-time jobs, although earnings data are subject to some wide confidence intervals see Labour Market Indicators – Earnings section.

- **Social mobility** - The latest estimates of social mobility indicate some significant difficulties in the area. Some areas – most notably Weymouth & Portland – do not fare well in terms of how they perform in terms of social mobility. In general, coastal towns appear to suffer with difficulties around improving social mobility - see Social Mobility and Inclusive Growth section.

- **Demographic challenge** - Another major component from a contextual perspective is the current and future projected demographic structure of the local population. The Dorset LEP areas are amongst the most aged parts of the UK: 1-in-4 of the Dorset population is aged 65+, compared to 1-in-5 of the national population. Dorset also has a much higher proportion of its population aged between 50 and 64. By 2025, over 40% of the population in the Dorset Council area will be in this age bracket. With population continuing to age over the coming years, the simple conclusion is that there would be less labour resource available within Dorset LEP than typically found elsewhere. A key influence on the scale and shape of future labour demand will therefore be related to 'replacement demand'[2], which is expected to be much stronger than in other areas of the UK, although its exact nature is difficult to model – see Demographics and Population Growth section.

- **Labour productivity** – Dorset's total Gross Value Added (GVA) has doubled over the past 20 years, reaching £18.5 bn in 2018 and in comparison with neighbouring areas has seen a continued, albeit slower growth. While the employment levels have been high prior to the pandemic, labour productivity in Dorset - as measured by GVA per hour - has been persistently lower than nationally, equating on average to circa £3.5 difference over the past few years and costing the economy an estimated £2.3 bn per annum. Brief overview of literature on labour productivity shows that poor skills utilisation, alongside poor management quality, are central part of the productivity problem nationally. Evidence suggests a negative relationship between over-skilling / under-skilling and within-firm labour productivity and the differences in managerial quality could explain these relationships. That is, better managers could be more effective at matching the qualifications, knowledge, skills and competencies of a worker to those required by a job.

[2] Replacement demand relates to the number of jobs in the workforce that will be required to replace those who leave employers, principally either because of retirement and/or occupational mobility.

- **Skills ecosystem** – Overview of the labour productivity research shows that skills development across the life span considering the needs of the local economy is a key to improving productivity. While higher qualification levels correlate with higher productivity, this relates to the optimal utilisation of skills rather than the skills base per se. This leads to a policy question about considering skills on a holistic basis i.e. the "skills ecosystem" where policy interventions and investment in skills address both the supply and demand side to positively affect productivity levels - see Labour Productivity.

Labour & Skills Demand

Over recent years and prior to the coronavirus crisis, the labour market in Dorset has been stable and the economy resilient and has grown at a measured pace.
Labour demand in Dorset has also been stable and, as evidenced by labour market intelligence, considerable volumes of jobs have been advertised within the area over the past few years (on average c75,000 per year between 2016 and 2019). While displaying signs of decline over 2019 (c.62,600 jobs) across all industries, the demand for labour was mostly aligned with the rest of the UK and the local industrial structure. (It has to be noted that recent developments have caused sharp decrease in advertised vacancies with the full effects on labour demand yet to be understood.)

Industries

Industry mix – Dorset's industry profile is not dissimilar to the UK broader picture. Related to Dorset's geography, demographic and economic profile, **employment and output are larger** in *finance and insurance*, *construction*, *healthcare*, *accommodation and food services*, *real estate*, *arts and entertainment* and **smaller** in *transport, ICT, professional and administrative activities*, compared to the UK.

- Historical developments in employment show variability within industries, with healthcare and accommodation and food seeing the biggest growth over recent years - see Industries in Dorset section.

- **Vacancy demand- Industries** – Prior to the latest developments, the labour market demand has been stable with considerable volumes of jobs advertised, although displaying signs of decline over the past year (***c.62,600 jobs were advertised over 2019***) across all industries, the demand for labour was mostly aligned with the rest of the UK and aforementioned industrial structure. A key area of demand that stands out is ***healthcare, where demand is notably higher in Dorset than elsewhere in the UK*** (c.11,300 jobs in 2019, accounting for 30% of all vacancies, compared to 21% in UK) – see Vacancies by Industry: Labour Market Intelligence
It has to be noted that recent developments have caused sharp decrease in advertised vacancies with the full effects on labour demand yet to be understood.

- **Industry mix and labour productivity**
Labour productivity differs across industries in a way that does not necessarily match the numbers in employment, raising questions whether the industrial makeup is a potential explanation for the lower productivity levels in Dorset.
Whilst industries differ in their average levels of productivity – knowledge intensive services on average twice as productive as less knowledge-intensive sectors, wider research suggests that industry structure appears to play a relatively small role in productivity differences.

Furthermore, less knowledge-intensive sectors are important in providing large proportions of jobs. This work ascertains that supporting improved firm level productivity can have a significant effect on aggregate regional productivity. Ensuring both business and management practices, innovations at firm level and availability of the right skill mix for the industrial structure in Dorset is essential in driving growth and productivity forward.

- **Key trends for industry development** – the structural trends expected to impact industry developments in the future include: ***technology and automation; globalisation, political & demographic developments and changing employment and learning patterns.***
  The potential within industries to respond to these new challenges is largely dependent on skills and the ability to implement and benefit from technological innovation, such as adoption of big data, cloud technology, machine learning, AI etc.
  The coronavirus has accelerated digital change and globalised labour markets benefit advanced technologically and knowledge intensive services. Digitalisation will be the factor that sets industries and businesses apart, allowing them to enhance productivity and competitiveness. In most industries, this would mean automation of processes and workforce shifts towards higher skills and entirely new occupations. Combined with longer working lives, shorter job cycles, remote work, and diminishing expertise shelf life, this creates a unique challenge for local businesses and calls for creative lifelong re-and up-skilling solutions - see Key Trends and Drivers of Future Industry Demand Industries in Dorset.

- **Industry projections** – see Reflections on Industry Demand
  Recent projections (published prior to the dynamic economic developments brought by coronavirus) estimate Dorset industries to *largely maintain employment levels* over the coming years. ***Where decline is expected, it is marginal*** over a 10-year period. Across all industries, ***growth in levels of employment is mainly concentrated in professional occupations.*** A notable increase is expected in **healthcare** and **business** with projected expansion of c.7,000 and c. 6000 jobs respectively over the studied period (2017-27).

- There are indications that **non-marketed services** will see continued growth, by rates higher than the rest of the economy with growth most pronounced in ***health*** *and* ***care*** where demand is perhaps ahead of supply. The shifts in the labour market during the outbreak saw a growing need for key and essential workers, predominantly in health and social care. The predicted employment expansion over the period until 2027 is concentrated mainly in professional and care occupations. Within the ***education*** sector there are indications for skills shortages nationally (particularly in teaching professionals) that are likely to limit employment growth. Education has the highest concentration of its workforce in professional occupations (over half 53%) and the demand for these is likely to increase. Demand in ***public administration and defence***, projected to see decline in employment prior to recent crisis, has recently picked up in response to the pandemic.

- There was an expectation for moderate growth for ***trades (retail and wholesale)*** and ***accommodation and food*** prior to the crisis, however recent data indicates that the closedown has caused the most significant damage to these industries in Dorset. This has already negatively affected employment and could have wider societal impact and disadvantage in certain areas of the county, particularly where lower skilled workforce is concentrated. Longer term trends in the sectors are re-emerging artisan trades and occupations like barbering, brewing and textiles.

- These sectors are also facing rapidly changing consumer behaviours (further accelerated during lockdown), such as switching to purchasing goods and services online, limited supply of immigrant workers due to Brexit and higher automation potential, which are all expected to have negative effect on employment, although this shift in consumer patterns could increase the demand for postal and transportation services.

- **Business services** sectors are covering a wide definition of sectors in Dorset, accounting for over a quarter of the total employment (91,000 - 27%) and a large proportion (£8bn – 43%) of Dorset's £18 bn GVA. They are likely to drive economic recovery, output and growth going forwards, particularly ***finance***, ***professional, business support and IT services*** and are also among the industries less severely affected by the pandemic, mainly due to larger proportions of workers able to work remotely. These sectors are forecast to continue making considerable contribution to the economy and the labour market and play a major role in the recovery process across the rest of the economy. Their ability to capture and incorporate innovation will likely have a significant impact on the long-term growth and this is likely to skew labour demand further towards higher-skilled roles. Predictably, recruitment and retention of individuals with the right skillsets is critical and has recently been identified as a key barrier to fulfilment of the growth potential.

- Projections for **manufacturing and engineering, construction and agriculture** before the crisis were for further augmentation, automation, and softening of employment demand. They are experiencing skills shortages in areas of skilled trades and the skills demanded are becoming outdated due to technological advances.
- Manufacturing demand might differ at 'sub-sectors' level, and employment growth is expected in more *advanced areas of engineering* and UK specialism areas, e.g. *aerospace, pharmaceuticals and other technology-intensive industries (such as automotive manufacturing)*. Processes and techniques such as 3D printing, additive and composite manufacturing and plastic electronics are changing the shape of production in the sector.

Key challenges include:
- *emerging technologies* and the sectors are struggling to attract and retain young workers, which are to be further affected by Brexit
- The fast changing technological landscape and emerging areas of expertise, such as *advanced green, sustainable and environmentally friendly technologies*, are particularly important for Dorset in its ambition to grow while preserving its outstanding natural environment. These considerations will generate new opportunities and challenges for the construction sector locally, meaning that availability of skilled labour and solutions to update existing skills is key for the economic outlook in the long-term.

- While future investment plans are very much on hold in the short term, these industries are likely to take steps to further digitalise and in the longer term automate some of their work processes. To address the expansion and replacement demand in a fast changing technological landscape and emerging areas of expertise such as green and advanced technologies, the availability of skilled labour and solutions to update existing skills will be an important consideration for the economic outlook in the long-term.

Occupations

Dorset's occupational profile is largely similar to that seen nationally with a higher proportion of people engaged as 'managers', skilled trades including 'skilled metal, electrical and electronic trades' and 'skilled construction trades, as well as 'caring' occupations.
The workforce occupational structure of the county has changed over the past decade and will continue to shift. A major trend for the future is polarisation of demand meaning demand for mid-skilled workers (typically non higher educated) will diminish and will shift towards higher skilled activities as well as lower skilled - including caring and elementary occupations, highlighting the creation of two-tiered economy with mid-skill workers tending to be pushed into lower skilled areas.3

- **Occupation projections** – Consistent historic movements in the Dorset occupation structure illustrated in the Occupational structure and replacement demand section, are informing the local modelling of future trends and projections and suggest that:

- Employment demand will continue to ***shift in favour of higher skilled occupations***, with further growth predicted in most ***professional*** occupations, some ***associate professionals***, and ***management*** occupations. These are also the occupations with largest proportions of those employed in Dorset (almost half - 49% of employed, c.182,000,).

- A key area of demand that stands out is ***healthcare, where demand is notably higher in Dorset than elsewhere in the UK*** (c.11,300 jobs in 2019, accounting for 30% of all vacancies, compared to 21% in UK) with the NHS being the most significant source of labour demand and this has continued throughout the coronavirus outbreak. Unsurprisingly, the single job with largest demand in Dorset was nurses – 5% of all advertised jobs over that period. This was followed by administrative roles and software development professionals – c2,000 jobs.

- Occupations within ***social and residential care*** are also likely to see demand of higher rates than the rest of the UK. There are consistent shortages in this area due to the relatively low pay and high physical demand, which is making the attraction and retention of workers progressively challenging in a post-Brexit climate.

- The ***second most significant group in demand based on vacancy data*** in Dorset are STEM occupations. There were 11,041vacancies in STEM advertised throughout 2019 in Dorset (29% of all vacancies). Within the group of STEM vacancies, the highest demand was for software developers/ engineers (c. 2000) representing a higher proportion of STEM vacancies in Dorset LEP than seen nationally (19% compared to 16% in the UK).

- **Decline** in demand is projected for ***administrative & secretarial, skilled trade occupations and process, plant and machine operatives***. However, labour market intelligence indicates *the actual demand* for the group of administrative and plant/ machine operatives *reached the 10-year projected net demand over a single year*, suggesting the projections of decline in these occupations might be overestimated in the short term. Similar observation has been noted at more granular level for science, research and technical professional and associate professional occupations, secretarial and some skilled trade occupations.

[3] McKinsey & Company , May 2017, What's now and next in analytics, AI, and automation

- **Replacement demand** – The larger proportion of people aged 50+ in Dorset means that a key influence on the scale and shape of future labour demand is related to replacement demand, occurring mainly as a result of retirement in Dorset and likely to be much stronger than elsewhere in the UK.
- Local modelling shows that despite our remarks on uncertainty, it is clear that replacement demand will have a substantial effect for most occupations and industries in Dorset. These projections estimate an overall c.**26,000 new jobs** to be created (between 2017-2027) while the vacancies created through **replacement** are expected to be over **132,000** which is **5 times the expansion** and means over a third (36%) of those currently employment in Dorset (c371,000) may need to be replaced by 2027. Replacement demand is also likely to largely offset the decline in occupations such as administration, skilled trades, plant/machine operations and sales.

- Replacement demand creates a unique conundrum, as requires replacement solutions for highly skilled and experienced employees, as well as reactive fulfilment of demand in lower-skill-high-turnover vacancies, whilst maintaining the perspective of the skills required for the future. It will require creative approaches to work, up and re-skilling of the existing workforce, rethinking views on ageing in the workplace and collaborative management methodologies to ensure best utilisation of talent in Dorset. Detailed reflections per occupation are provided in section Vacancies by Occupation: Labour Market Intelligence

Skills and Qualifications

- **Qualifications** – On average, qualification requirements are rising for most occupations. Currently 41% of those employed in Dorset are qualified to Level 4 or higher, the UK reference being 45%. Forecasting projections show a continued shift towards high-level qualifications with around 55% of the employed expected to be qualified at level 4 and above, whilst the proportion of those with level 1 or no formal qualifications expected to shrink from currently 14% to under 8% in 2027 - see Skills and Qualifications Demand section.
- This growing demand for formal qualifications going forwards is most clearly reflected in the net demand of jobs projected[4], where a stark shift is expected with over 77% of jobs in Dorset over the period 2017-2027 expected to require Level 5 qualifications and above, equivalent to circa 144,000 jobs to 2027.

  Analysis of the top ranking skills in demand in Dorset under the broad categories of general, digital and specialised skills shows clear themes for skills demand now and in the future.

- **General skills –** research shows that soft skills are essential addition to the core competencies required for performing a job. Those that were most commonly requested by Dorset employers and predicted to grow in importance fall into the following categories:
  - **Human interaction skills** (appear in the majority of jobs where skills are listed c 48,000 - *communicating, presenting, persuading, managing, teams and relationships, language)*
  - **Personal productivity skills** (in c15,000 or a third of vacancies advertised - *managing workload, goal-setting, time-management, prioritisation)*

[4] Net demand created through change in employment levels through expansion/decline and replacement demand over the period 2017 – 2027 according to the Working Futures 2017-27 study

- **Analytical, problem-solving and decision-making skills** (c11,000 or a fifth of vacancies - research, analysis, critical/strategic thinking, creative problem solving, troubleshooting)
- **Personal attributes** (c6,000 or over a tenth of vacancies - positive disposition, energy, initiative, creativity, self-motivation and ability to learn quickly)

- **Digital and Technical Skills -** with the increased virtual and distance working requirements and given the well-established prevalence of skills shortages in STEM, these skills are essential but difficult to predict due to relatively short "shelf life" and unknown 'disrupting' influences. Most commonly requested by Dorset employers among them were:
  - **Microsoft Office** (9,000 - with Excel and Outlook demand on the rise)
  - **Software development and engineering**, **programming languages** (n=c7000) with **Python** expected to grow, the majority to remain stable (Java, JavaScript, C++, PHP, HTML, UML), and Microsoft C#, .NET, XML and jQuery expected to see a decline
  - **Productivity tools for managing enterprises and customers** such as **ERP, SAP and CRM** become increasingly important, as do tools for managing problems and projects such as **Scrum**, as well as automation and configuration tools such as **PowerShell**

- **Specialised Skills –**those most in demand in this category represent the wider occupational demand in Dorset with major skills clustered around **nursing**, **care work, sales, programming**, etc. Apart from the job-specific skills, the majority of jobs require relatively 'generic' skillsets, such as customer service, teamwork, budgeting and project management.
  These findings highlight the importance of holistic educational programmes that combine key specialist with key soft skills – a concept, which has seen wider support in research.

- **Employer feedback** - In our 2020 survey, almost one quarter (23%) of employers surveyed recently for this research reported they have had at least one hard-to-fill vacancy in the last 12 months with the most common reason given being lack of applicants with the right skills. Among the 'Skills Shortage Vacancies' employers mentioned manufacturing/ engineering, sales and marketing, human health, chefs and other hospitality and Professional services roles - accounting / finance/ legal roles, which align with our findings.
- In addition, over half of employers (56%) reported at least one type of skills gap across their existing workforce with 1 in 3 (36%) reporting multiple gaps. Those most commonly experienced were **Digital, Sales and Marketing, Analytical, Leadership and Management skills gaps.**

Supply of Labour & Skills

- **Qualification profile** – Over this decade, Dorset has mirrored the national trends both in the occurrences of more people achieving higher-level qualifications and fewer with no qualifications, which could be seen as a significant structural change over a relatively short space of time. The biggest increases since 2010 are seen in the proportions qualified at Level 3 and above (by 9.3 percentage points) followed by those at Level 4 and above (by 8 percentage points). Over the same period, the proportion of those working-age people with no qualifications has fallen (by 2.3 percentage points) to 4.9% which is lower than the UK average of 7.7%.
- Yet, *a fifth* of the working age population (23%) *does not have a Level 2 qualification, which is regarded a benchmark for employability*.

- Dorset has also fallen behind the UK in achieving Level 4+ qualifications. Whilst exceeding the national average in 2014 by 0.5 percentage points, the progress has been slower than elsewhere with the gap now at 2.3 percentage points.
- The proportion of working-age population with Level 4+ qualifications fell in Purbeck and Weymouth & Portland, which is in contrast with the projections of future demand.

- **Ofsted results** - The larger proportion of schools in Dorset has been rated as 'good', or 'outstanding' by Ofsted. Broken down into the two local authority areas, 90% of the schools in Bournemouth, Christchurch and Poole and 79% of those in Dorset were rated as either 'good' or 'outstanding'. Conversely, there were greater proportions of Post 16 educational providers within Dorset Council having 'good' or 'outstanding' results (DC=91%; BCP=83%).

- **Access to learning is an issue** in Dorset as it is in many other rural areas. For example, two-thirds of children accessing secondary school by either public transport or walking have within the 10% longest journeys within England. Similarly, just over half of those accessing Further Education colleges are within the lowest decile in terms of journey times.

- **Primary and secondary school performance** – Both primary and secondary performance in Dorset is largely in line with the national reference, children generally progressing and achieving at, or above, the average rates. Some variations noted at lower geographies, with school children in BCP generally performing better and attainment varying over the years in Dorset council. The share of students achieving standard GCSEs in English and Maths is higher than the England average at both council areas and well above at BCP schools.

- **Outcomes of disadvantaged students** - There is a clear differential in terms of destinations/outcomes for disadvantaged students. *Attainment of disadvantaged students is lower* than the pupil population, the gap in attainment being particularly pronounced in Dorset Council area at secondary level (where disadvantaged students' attainment is on average 23 months behind their disadvantaged peers). The evidence suggests that this gap has widened over the past 5 years and widens as school life progresses, but is apparent at an early stage – with significant gaps in attainment already established pre-school. At a national level, analysis suggests that 40% of the gap that exists at the end of school is already apparent by age 5.
- Disadvantaged pupils are also less likely to move into continued forms of education after Key Stage 4 and more likely to move into *outcomes/destinations, which are not sustained*. This raises concerns about whether those individuals simply move into some form of *transient state* i.e. temporary employment opportunities.

- **Post 16 destinations** - Most 16-18 year olds (just below 90%) continue into other forms of education although there is some variability by geographies. 5% of 16-year olds move into an apprenticeship, with a further 3%-5% moving into a sustained employment destination. Compared to the UK and South West, greater proportion of students in Dorset choose to continue in a school sixth form rather than an FE College. The majority of those who went onto education progressed into higher education (Bournemouth 53%, Dorset 41% and Poole 41%). Breakdown by institutions highlight that more students from BCP schools/ colleges tend to continue into HE destinations, FE students tend to progress more into employment, rather than educational destinations and the gap between disadvantaged students and their non-disadvantaged peers appear more pronounced for students from Dorset schools/ colleges.

- **FE Participation** - There has been *a fall in FE participation* within the Dorset LEP area (overall, there were c.6000 less FE learning participants in Dorset in 2018-19 compared to 2014-15), and this has principally been due to a significant *fall in the number of adult learners (aged 18 and above)*. The largest falls in participation have occurred at adult learners in Dorset Council. It terms of levels of study, participation at Full Level 2 has seen the largest decline.
- It appears that the cuts in funding – combined with changes in eligibility - to the adult education budget have had a considerable impact on the ability/propensity for providers to offer learning opportunities to this age cohort. This mirrors wider UK trends. However, analysis at a provider-level – focusing on the principle FE providers in the area – shows that these trends are not necessarily occurring through the main FE providers where adult learning is holding up well. One explanation between the macro picture (Dorset LEP wide) and the micro picture (provider specific data) could be that other forms of adult learning such as remote/online are the areas which are being affected the most.
- **FE Participation – influencing factors** - In general, the fall in the number of 16-18 learners over this period has been influenced by demographics, whilst the fall in adult learners has been influenced by policy changes at a national level. This provides implications and policy questions at a local level– partly to address the 'replacement demand' issue, as well as aiming to move more of the workforce into more (existing or new) productive jobs. It could be argued that these local economic development aspirations are constrained by changes in national adult educational policy (and associated funding).

- **Apprenticeship Participation** - Apprenticeships are one way in which the Government intends to address the skills gaps, the social mobility issues and the productivity problem in the UK and evidence suggests they are an effective tool to improving social mobility. However, mirroring national trends, the apprenticeship starts in Dorset have fallen over recent years. For example, the number of apprenticeship starts in Dorset in 2018/19 was 74% of the level in 2014/15 - a decline of 26%. National data shows the decline in starts is more pronounced amongst those from disadvantaged backgrounds (36%), who benefit the most from them. This is also accentuated by evidence that nationally over a third of those who start apprenticeships fail to achieve them.

- Latest national figures show that COVID-19 has caused a significant further disruption to apprenticeship starts and 48% decline was recorded over the period 23 March – 31 May 2020 on that period last year[5].
- Prior to the coronavirus, the fall in apprenticeship starts has largely been associated with the 2017 reforms of the apprenticeship system which introduced the apprenticeship levy and apprenticeship service and changed the funding regimes with an emphasis on higher level qualifications.
- Consequently, we find that the falling number of apprenticeship starts in Dorset is mainly accounted for by:
    - the decline in intermediate apprenticeships starts (c.1760 less intermediate apprenticeships started in 2018/19, compared to 2016/17, marking a 41% decrease over that period)
    - the decline in female uptake of apprenticeships - there were c.1270 less women starting an apprenticeship in 2018/19, compared to 2016/17, marking a 34% decrease

[5] Apprenticeships and traineeships: June 2020, DfE - https://www.gov.uk/government/statistics/apprenticeships-and-traineeships-june-2020

- the decline in apprenticeship starts among learners aged between 19 and 24 (c/820 less learners from this age group started an apprenticeship in 2018/19 in Dorset compared to 2016/17 – marking a decline of almost 30%)
- the decline in apprenticeships delivered by private training providers (c.1430 less apprenticeships starts delivered by private providers in 2018/19 compared to 2016/17 – marking a decline of 36%)
- There has been a shift into higher apprenticeships which have almost doubled (and accounted for 14% of all apprenticeship starts in 2018/19 from just 5% in 2016/17).

- **Apprenticeships subject areas** - Most apprenticeships are associated with occupations that this research identified as growing and essential in responding to employer need – with ICT, Health and Care, Engineering and Business being most prevalent areas in Advanced apprenticeships; higher volumes of Higher apprenticeships in Business and Healthcare; and most intermediate apprenticeships concentrated in Healthcare and Engineering.

- Data provided by principal skills providers – including the local universities, colleges and adult community learning highlight the important role they play in providing learning opportunities to individuals that may be classified as 'socially disadvantaged'.

- Almost half of the learning starts and over half of the achievements were delivered by FE Colleges including tertiary education throughout 2018-19. The HE/FE providers and the adult & community learning offer a very wide portfolio of learning opportunities across a whole spread of subject areas, the majority aligning closely with the priority areas outlined in this report. For FE and adult learning however the extent of curriculum offer is considerable, with some subjects supporting a low number of learners and *the engagement with the learner community is learner demand-led* i.e. driven principally by the demand from students rather than the needs of the local economy and employers.

- The Area Review – published in August 2017 - looked at how FE provision is delivered in the Dorset LEP area. It concluded with a set of recommendations about how the FE Colleges can work more closely together to provide a complementary offer. It did not conclude that major structural changes were required. However, anecdotal feedback received as part of this analysis has raised some questions around whether *greater competition in provision within the area may provide benefits in terms of the quality of provision*. This is highlighted for consideration, although not necessarily evidenced.

- The **demand for places at the area's Universities is high**, with applications/ placements broadly equating to 5:1 – although differing across subject areas. The area's universities provide recognised specialisms and the data shows their contribution to the skills mix of the local economy is critical having in mind the expected shifts in the occupational structure would predominantly require higher qualifications.
- The research confirms that Dorset has relatively good performance in skill levels and educational attainment. The two significant exceptions are adult participation in lifelong learning and apprenticeship participation, both factors expected to play a major part in the recovery from the crisis and meeting future labour demand.

About this report

This report analyses available evidence about the Dorset labour market. It covers a range of topics from the size and nature of the labour market, to an analysis of current skills supply in Dorset.

In the context of this analysis, Dorset is meant by the Dorset Local Enterprise Partnership (DLEP) area. However, wherever possible and appropriate the analysis does focus on a more detailed geographical breakdown – principally those represented by the Bournemouth, Christchurch and Poole (BCP) and Dorset Council areas. In April 2019 the local authority structure within the DLEP area was restructured. This resulted in the formation of the primarily urban-based Bournemouth, Christchurch and Poole Council, and Dorset Council becoming a single-tier authority. It is important to note that from a data perspective, several data sources have yet to 'catch up' with this local authority reorganisation. As a consequence, it is not always possible to present data from different sources consistently. The report does present data at lower geographies when appropriate because it reflects underlying differences in socioeconomic characteristics in areas within DLEP. We feel that is important and provides a level of granularity in the analysis.

This report has been largely guided by the available guidance, principally as indicated in the Skills Advisory Panel analytical toolkit[6], developed to help Skills Advisory Panels (SAPs) build robust evidence on local skills needs and wider labour market challenges. This is intended to lead to priorities informing the skills agenda. It also contains additional data that aims to enhance the publicly available evidence. Most notably, this includes data directly provided by the major providers within the area. A list of the sources used is included as an Appendix - Data sources.

[6] https://www.gov.uk/government/publications/skills-advisory-panels-analytical-toolkit

Context

It is important to note that **labour demand is a derived demand.** That is, hiring labour is not desired for its own sake but rather because it helps businesses produce output, contributing to an employer's revenue and hence profits, or to the efficiency and effectiveness of their outputs and services.
Why this matters for local economies:

- The demand for skills is dictated by the actual or anticipated demand for goods and services
- When demand for goods and services increases or decreases rapidly, the supply of labour cannot always adjust as rapidly – thus leading to excess demand (unfilled vacancies); or excess supply (unemployment)
- Many policies and initiatives emphasise an increase in the supply of skills or increasing levels of qualifications amongst the workforce as a route to economic growth
- It's not always clear what the demand is or where it will be in the future. Businesses and employers operate in a market environment and react to it – it is not always possible or reasonable to plan five years ahead. This is particularly the case for those businesses with 'limited organisational capacity' to plan ahead
- Broadly there are:
- **'external skills drivers'** – these factors influence the pattern of goods and services produced and therefore the sectoral structure of employment. These factors include technological change, globalisation and public policy.
- **'internal skills drivers'** – these factors produce significant changes in the patterns of employment within particular industries, including major restructuring of the way work is organised (occupational effects). Skill requirements within organisations are driven by the business strategies they adopt.

- In summary, there are many reasons why mismatches occur between demand and supply in the labour market and it will always be a dynamic situation – affected by the situation at the 'macro level' (economic conditions) and at the 'micro' level (local business competitiveness). In that sense, any 'snapshot' will not fully capture the inherent dynamism of labour market conditions. However, it should highlight relevant structural issues – using near-term trends to better understand what is happening.

There is a limited effective supply of labour. People have a limited amount of time to work during the day and are only willing to travel certain distances or times to work. Why this matters for local economies:

- There are constraints to the effective supply of labour. In smaller economies such as Dorset, with current high levels of economic participation, there is limited capacity to increase supply (in terms of volume) from the existing resident workforce
- Adjustments in labour supply are not smooth or frictionless. It is often difficult to increase labour supply rapidly
- The ability of supply to respond will rely on existing levels of excess capacity (often signalled by high unemployment or inactivity); the rate of growth in the working-age population; the ability of migrants to enter the labour market; and the mobility of workers in the local, or adjacent, areas
- Individuals volunteer to be available for work. Some individuals do not make themselves available and remain 'economically inactive.' Ultimately, labour supply reflects the choices made by individuals.

Skills belong to the individual and are portable, can be withdrawn and then reinstated in the market. Individuals effectively 'rent' their labour and skills to employers. Unlike other forms of productive assets or capacities which reside with the firm, skills reside in the individual – who can withdraw their labour temporarily or permanently (by leaving the workforce or moving to another job). Why this matters for local economies:

- Labour is mobile (although certainly not 'perfectly' mobile and there are barriers which impact the mobility of labour), people can commute, and there are conditions where people can enter or withdraw from the labour market
- Firms may also be unwilling to spend money on training on general/transferable skills as workers may then move on to other jobs and take these skills with them. It is often cited that this leads to a market failure in firm-based training provision. Businesses are unwilling to invest in training due to the risk of the 'returns' to that investment being experienced elsewhere due to the risk of that individual simply leaving. This may suggest that collaboration between businesses requiring certain consistent skills may be a useful way of sharing/reducing the cost of training, although they would still need to guard against individuals moving between businesses.
- There are many **information asymmetries** where there is imperfect information in the labour market. For example, employers do not know how productive an employee will be before they employ them, no matter their qualifications. Employees do not always know about the working conditions, investment plans or the efficiency of the business they work for (which will affect their wages in the long-term). It is also often unclear what specific skills/qualifications are needed in a local economy and hence what courses training providers should offer and what training people should undertake to enhance their opportunities in the local labour market (in many senses the core issue that this work is trying to inform).

- Why this matters for local economies:

    - Given that information is imperfect for the supplying and hiring of labour, there will be structural deficiencies, such as a lack of (or the wrong) supply of training and workers for certain jobs.
    - Workers have to interpret the pay, conditions and nature of jobs themselves, and make choices based on available information, and perceptions.

Economic Context

Discussion points

Local specifics in terms of labour market activity, earnings, structure and productivity, demographics, deprivation, social mobility and inequalities.

In broad terms the Dorset labour market has displayed similar characteristics to the wider UK economy over the last 10 years. The recovery from the previous recession was a period of **relatively slow output growth but a relatively robust labour market when measured by 'engagement'.** That is, prior to the coronavirus related closures employment levels remained (perhaps surprisingly) high and unemployment levels did not increase markedly. The evidence suggests that 'capital deepening' (business investment) fell away sharply as a result of the credit squeeze and has not fully recovered, despite 'cheap money' (low interest rates) being available. There was significant downward pressure on wages, which meant that the cost of labour declined in real terms. Consequently, many businesses substituted labour for capital – partly explaining why employment levels remained high. The other explanation was that those sectors that experienced highest growth i.e. leisure, care etc. were all relatively labour-intensive sectors. It was less easy to substitute capital.

One of the consequences of this was that **labour productivity initially declined over several years (in absolute terms) and has subsequently struggled to recover to pre-recession levels since.** The relatively small adjustment in the labour market was one of the reasons for the persistent 'productivity puzzle' that remains today.

As with many other areas outside London and the Greater South East, relative productivity lags in Dorset compared to the UK average. Lagging productivity sets much of the context for the requirement to ensure that Dorset's residents have the skills needed for its businesses. Skills – and the utilisation of those skills - remains one of the primary drivers for overall improvements to business productivity and current and future competitiveness. Given the emerging Dorset Local Industrial Strategy has a key focus on improving (absolute and relative) productivity, then an important policy focus will be how the skills offer in the area can better drive local productivity. There is also an increasing recognition that the benefits of economic growth are not experienced by all with many disadvantaged communities and individuals within Dorset LEP. Improving skills so that individuals are better placed to secure employment, and increase wellbeing is a fundamental tool to improve individuals' circumstances. In that sense, skills development is central to the focus of improving 'inclusive growth' and actions to address the issues identified here have been recommended in the Dorset People and Skills Plan.

Labour Market Indicators – Engagement

Again, noting that this analysis pre-dates the Covid-19 outbreak, the following section looks at the measures of 'engagement' within the Dorset LEP labour market. Towards the end on 2019, the labour market largely exhibited the features of 'near-full employment'. The historically high employment and low unemployment and economic inactivity levels (up until the end of 2019) indicate there is not a significant pool of unused labour resource to attract and in the context of competition between recruiting businesses retaining key staff has been a challenge for employers. It is yet to emerge how the latest pandemic and lockdown would affect the economy and labour markets going forwards, but this section looks back at the period of previous economic downturn recovery thus providing some indication.

As stated above, the levels of labour market engagement in Dorset have remained relatively high despite 'softness' in economic conditions. As shown in Figure 1, **economic activity rates** of working age people (which broadly reflects the proportion of working-age people who are available for work) in the Dorset LEP area were two percentage points higher than the UK average, with Dorset Council area displaying the highest levels. Figure 1 highlights that in the UK the trend has gradually been increasing over time, the variability in the local data probably reflecting data issues more than any inherent volatility. These levels of economic activity are high when set in a historical context.

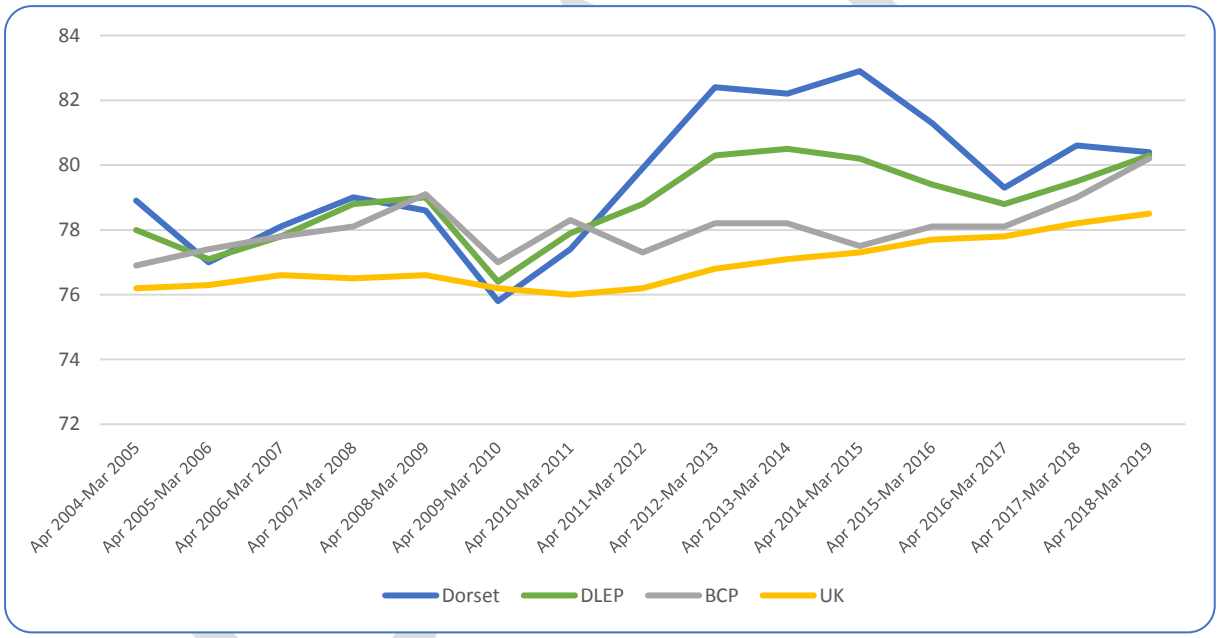


Figure 1. Economic activity rate – (% aged 16-64). Annual Population Survey – ONS

Similar trends are seen in terms of **employment rate** (reflecting the proportion of working age people who are in employment). Again, employment rates have been high in historical terms. Broadly, three-quarters of the Dorset working age population were in employment. Figure 2 shows that even in the recession and post-recessionary period, the employment rate did not fall markedly – only by around two percentage points – and has increased consistently thereafter to exceed pre-recession levels. This also illustrates the employment rate in Dorset LEP being two percentage points higher than the UK average at the end of 2019.

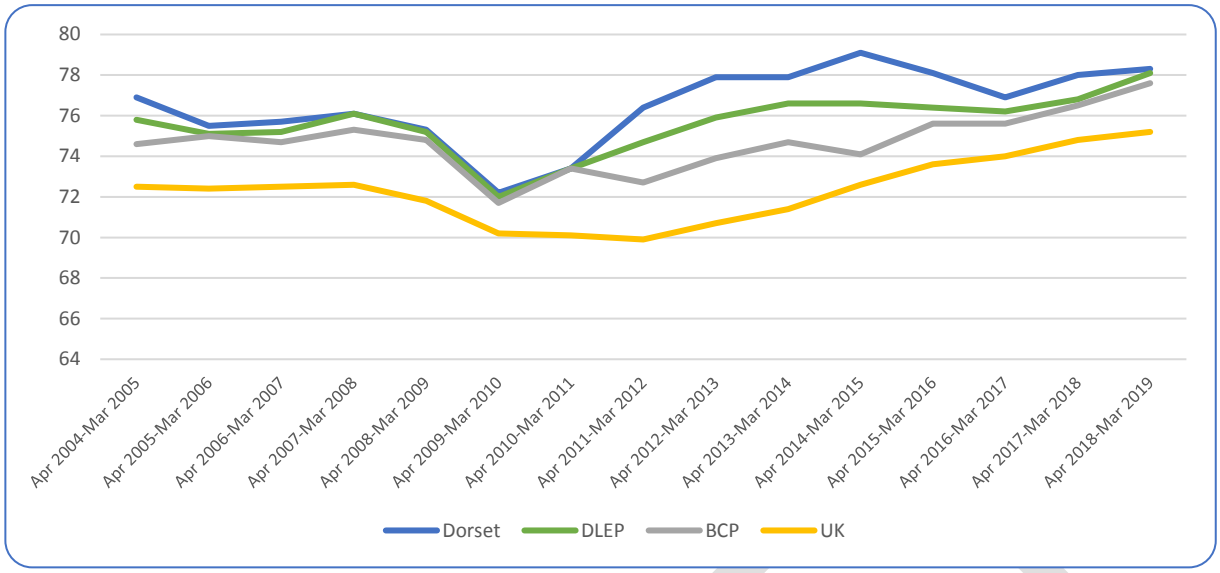


Figure 2. Employment rate – (% aged 16-64). Annual Population Survey – ONS

As expected, the unemployment rate has commensurately fallen over the same period. In Dorset LEP (and within BCP and Dorset Council areas) it was standing at 2.4%[7] compared to 3.9% nationally (figures from ONS annual population survey Jan-Dec 2019). The unemployment rate as shown in Figure 3 is effectively the difference between the economic activity rate (Figure 1) and the employment rate (Figure 2).

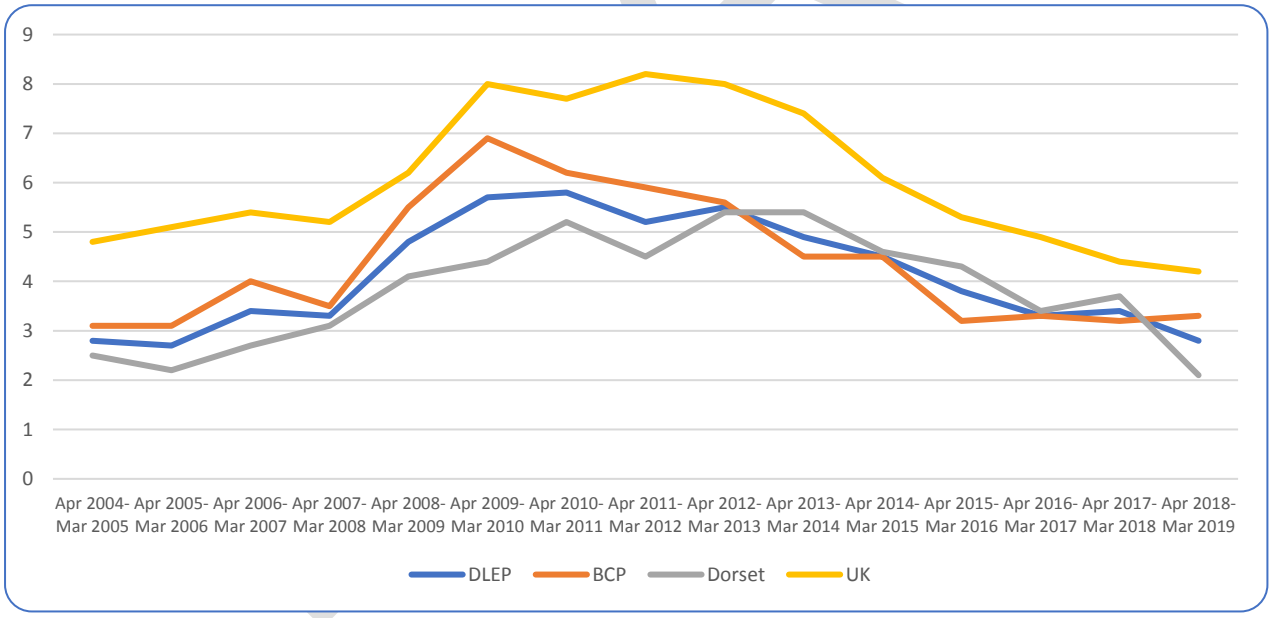


Figure 3. Unemployment rate – (% aged 16-64). Annual Population Survey – ONS

[7] This represents the estimated proportion of working-age people who are unemployed, although may not necessarily be claiming any form of unemployment benefit. The claimant count – which does capture only those who are claiming unemployment-related benefits – was lower.

The 2019 Alternative claimant count statistics[8] for each area are set out below, showing that whilst the claimant numbers have fallen compared to 2014, there has been 'softness' over the past 2 years – with a reasonable increase in both council areas, more notably for BCP and c10,000 claiming unemployment benefits. Early indications on claimant numbers from May 2020 show that these have significantly increased almost tripling over the first full month of lockdown (ONS, Claimant count).

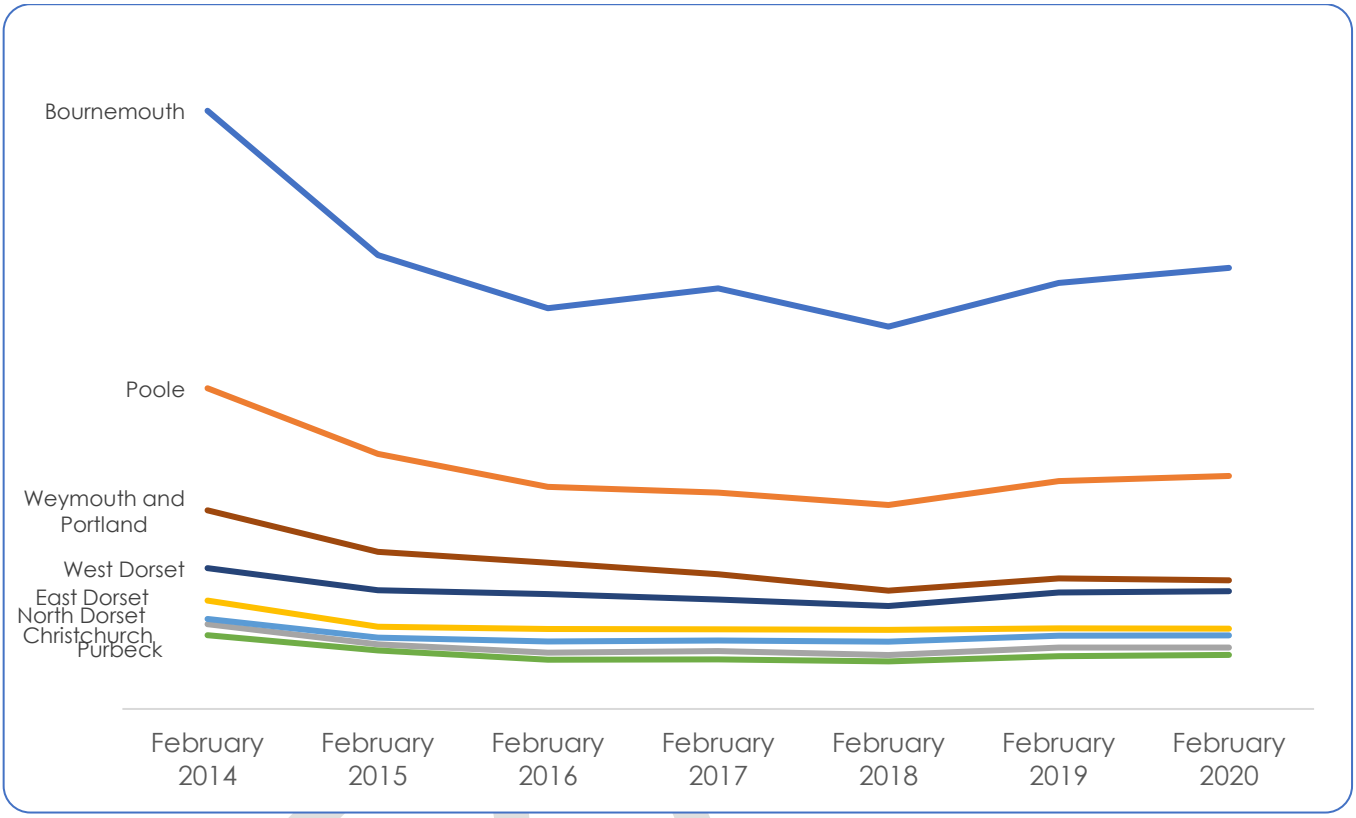


Figure 4. Alternative Claimant Count statistics all ages: February 2014 to February 2020, DWP

Table 1. Alternative Claimant Count. Alternative Claimant Count Statistics – DWP

	BCP – Nov 2019		**BCP – Feb 2020**	
	16-24	**All**	**16-24**	**All**
Alternative Claimant Count	909	6,145	983	6,601
Change on Year	159	387	95	182
% Change on Year	17%	6%	11%	3%
	Dorset Council – Nov 2019		**Dorset Council – Feb 2020**	
	16-24	**All**	**16-24**	**All**
Alternative Claimant Count	544	3,720	605	4,080
Change on Year	44	34	23	6
% Change on Year	8%	1%	4%	0,1%

[8] Claimant Count is the historical measured of the number of people in receipt of unemployment related benefits. With the introduction of Universal Credit, there is a broader span of claimants required to look for work than under Jobseeker's Allowance, so the Claimant Count has increased. ONS has therefore introduced the new Alternative Claimant Count statistics to measure the number of people claiming unemployment benefits by modelling what the count would have been if Universal Credit had been in place since 2013. The statistics provide a consistent measure of local levels of unemployed claimants over time and across areas and a better indication of labour market change. These statistics do not replace the Claimant Count.

The final 'engagement' measure is the proportion of working age people who are classified as economically inactive. Effectively, this is the residue of the economic activity rates shown in Figure 1 earlier. Over the longer-term (the past 20 years) the proportion of people who were classified as economically inactive has fallen significantly. This has been largely driven by increasing levels of labour market engagement by women.

As Figure 5 shows over the last few years within DLEP this has remained constant at 20% of working age people. This measurement tends not to differ significantly over time. However, it is important to note that economic inactivity can quite often be as much to do with personal choice, as well as it being an 'enforced' circumstance. The survey data suggests that 80% of those who are currently economic inactive do not currently want a job – therefore are 'passive' within the labour market. Conversely, 20% of the economically inactive of working-age within DLEP do want a job. Therefore, it could be argued that only 4% (20% of 20%) of the DLEP working-age population were in 'enforced' economic inactivity. Further analysis of the data by gender shows that there are only marginal differences between male/female workers in terms of the proportion who are in 'enforced' inactivity – according to the statistics, 23% of inactive females wanted employment compared to 19.5% (although there are confidence intervals associated with this data which may mean differences in this measurement are actually negligible).

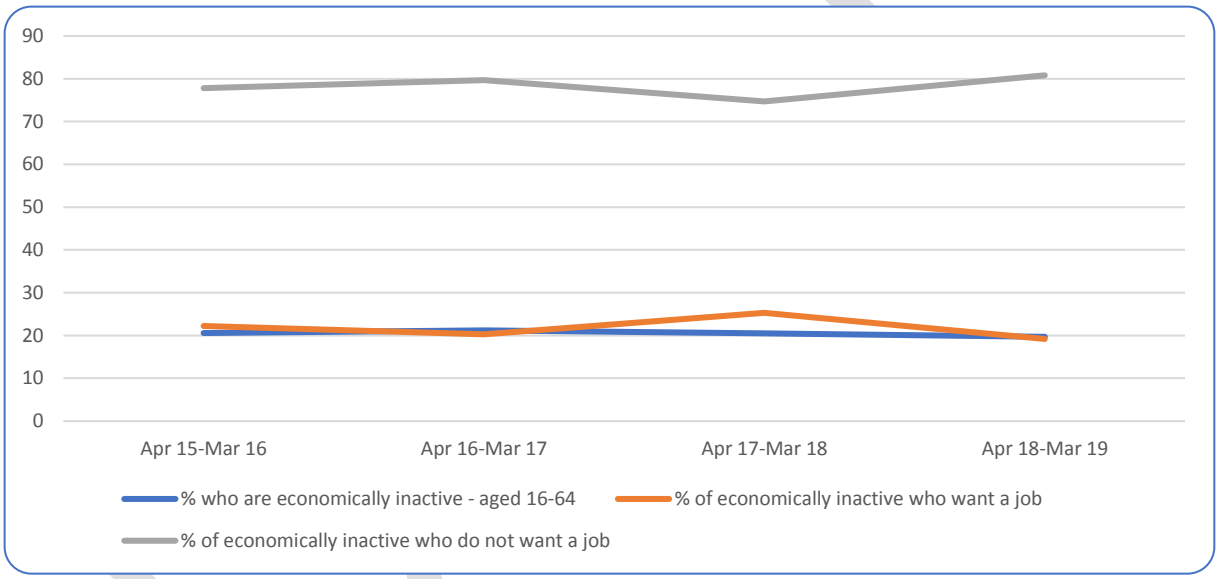


Figure 5. Economic inactivity – DLEP (% aged 16-64). Annual Population Survey – ONS

These measures of 'engagement' prior to the recent coronavirus developments painted a picture of 'near full employment' in the DLEP labour market with (in absolute and relative terms) historically high employment and low unemployment and economic inactivity levels. The engagement measures are likely to change markedly within these later developments. In the context of this work this meant that businesses wishing to recruit were not able to draw on a significant pool of unused labour resource. This created competition in the labour market and between recruiting businesses, which may also be the case going forwards for occupations of high demand.

Prior to the pandemic affecting the economy, the relatively sanguine labour market context was also challenging for businesses wishing to retain key staff as confirmed by the anecdotal feedback received by local businesses.

Labour Market Indicators – Earnings

Average earnings within Dorset LEP broadly mirror the national picture in terms of level and profile. Figure 6 shows mean and median earnings, as well as average earnings across each percentile of those in work (as estimated through survey data). The 10th percentile captures the lowest 10% of earners, with the 90th percentile capturing the highest 10%. **The average (median) annual wage in Dorset LEP is marginally below the national (median) average, and given that the UK average will be influenced by earnings within London and Greater South East, this data indicated some robustness in the demand for labour (assuming that wage levels are one indicator of the 'tightness' of demand).** Mirroring the national picture, the lowest 10% only earn less than one fifth of the top 10% - highlighting some wider equity/distribution issues.

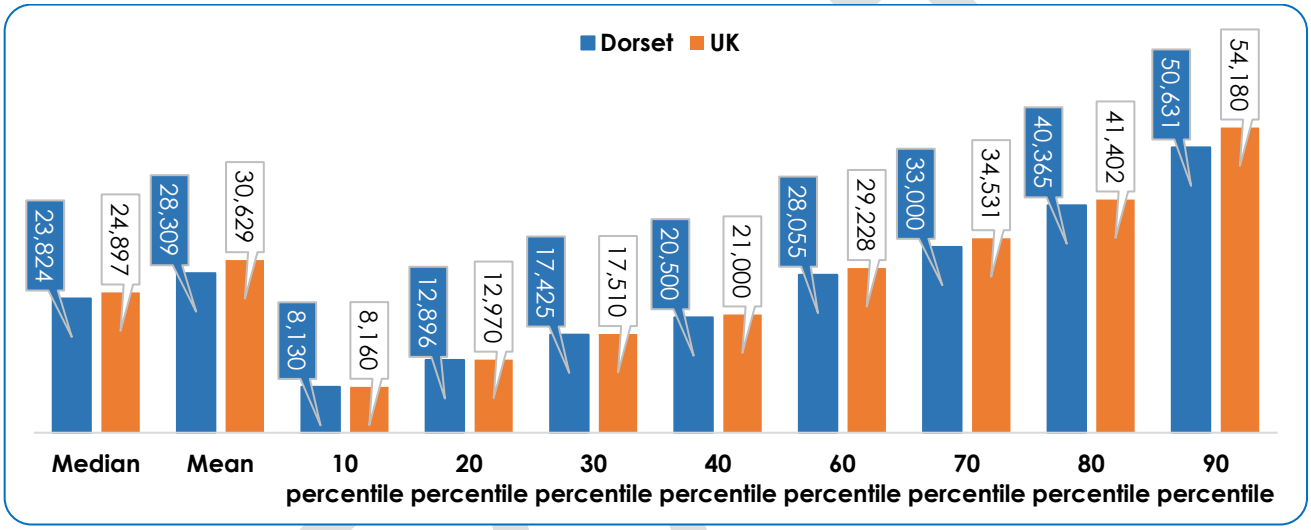


Figure 6. Average gross annual earnings (£) – 2019. Annual Survey of Hours and Earnings – ONS

The earnings picture within the Dorset LEP areas does differ – as shown in Figure 7 (although this data is associated with wide confidence intervals at lower geographies and therefore some care should be taken with its interpretation).

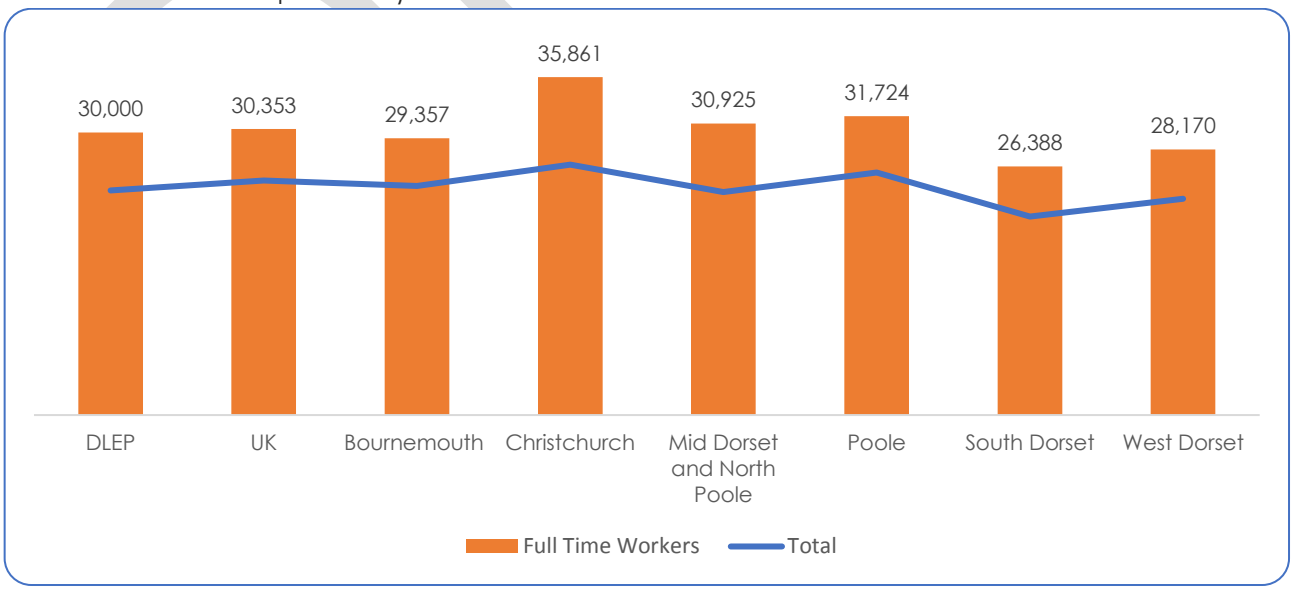


Figure 7. Average (median) gross annual earnings (£) 2019.Annual Survey of Hours and Earnings – ONS

Analysis of the data for the local districts in Dorset broadly shows a picture of workplace wages being higher in the urban BCP area and some parts of Dorset, with lower workplace earnings in the South Dorset (Purbeck, Weymouth & Portland). For example, in 2018 average weekly gross pay for Weymouth & Portland was estimated to be £270, compared to £415 in the wider DLEP area – although a wide confidence interval is associated with these estimates. With that important caveat in mind, a large part of this differential appears to relate to female earnings, with female earnings in Weymouth & Portland two-thirds of the wider LEP levels.

This picture of lower wages in some areas is also confirmed by the estimated proportion of individuals in employment who are earning below the National Living Wage (currently £9 per hour). Figure 8 demonstrates how this differs across the region.

Almost half (48%) of those in employee jobs and 70% of those in part-time jobs in Weymouth & Portland were earning below the Living Wage in 2018. Whilst recognising this data is associated with wide confidence intervals (and should be interpreted with caution), this paints a rather stark picture. We have not included the (old) Dorset areas where confidence intervals are so wide there is little confidence in the estimates[9].

Over a fifth (26.9%) of the jobs in the Dorset Council area are estimated to be below this threshold – equivalent to 46,000 jobs in 2018. National estimates indicate that – as perhaps would be expected – a higher proportion of younger people (<20) and those working in part-time employment (43% PT vs 15% FT) tend to receive wages below this threshold. Again, as expected a higher prevalence is found in sectors such as accommodation and food services.

Figure 8. Proportion (%) of employee jobs earning below the Living Wage Foundation rates (2018).
Annual Survey of Hours and Earnings – ONS

Looking at the data in terms of gender provide some useful insight. Figure 9 shows an apparent 'pay gap' between male and female earnings in Dorset LEP, as in the UK. Some of this can be explained by the higher levels of part-time work for females, which is reflected in Figure 11. As indicated in Figure 9, while the average (median) male annual wage in Dorset LEP broadly matches the UK average, the 'pay gap' between Dorset LEP females and their UK counterparts tends to be wider. Data from the ONS (non-published but user requested) has estimated the gender pay gap between male and females and by age within the Dorset LEP area. This provides some useful insight. In broad

[9] Data for the smaller (old) local authority areas were associated with confidence intervals which were deemed by the ONS as not robust and therefore not presented here

terms, it shows that the gender pay gap increases through the typical working life – peaking at c30% for those aged 50-59. The data also indicates that this gender pay gap is largely driven by differentials of pay for those working full-time. For Dorset LEP this is set out in the below table – the data is shaded according to the quality rating of the data.

Table 2. Gender pay gap by age. ASHE data – user requested

Age	Gender pay gap (% - median)	Quality
16-17	-19	Considered lower quality
18-21	7.0	Considered good quality
22-29	8.7	Considered reasonable quality
30-39	11.6	Considered reasonable quality
40-49	18.3	Considered reasonable quality
50-59	29.4	Considered reasonable quality
60+	16.2	Considered reasonable quality

This broad picture can also be seen at a national level. The overall gender pay gap in the UK among all employees was estimated to be 17.3% in 2019 and has been declining. However, the gender pay gap for full-time employees has only declined marginally since 2012. Whilst the gender pay gap in some age groups has decreased (sometimes substantially), for those aged over 50 there has been little change over time. The gender pay gap for those aged 50-59 at a national level is estimated to be 15% (Note – this is significantly lower than the DLEP statistics in the above table – highlighting that some care needs to be taken regarding the data at lower geographies).

Again, it is important to reiterate that these measures relate to all jobs, not the difference in pay between men and women for doing the same job.

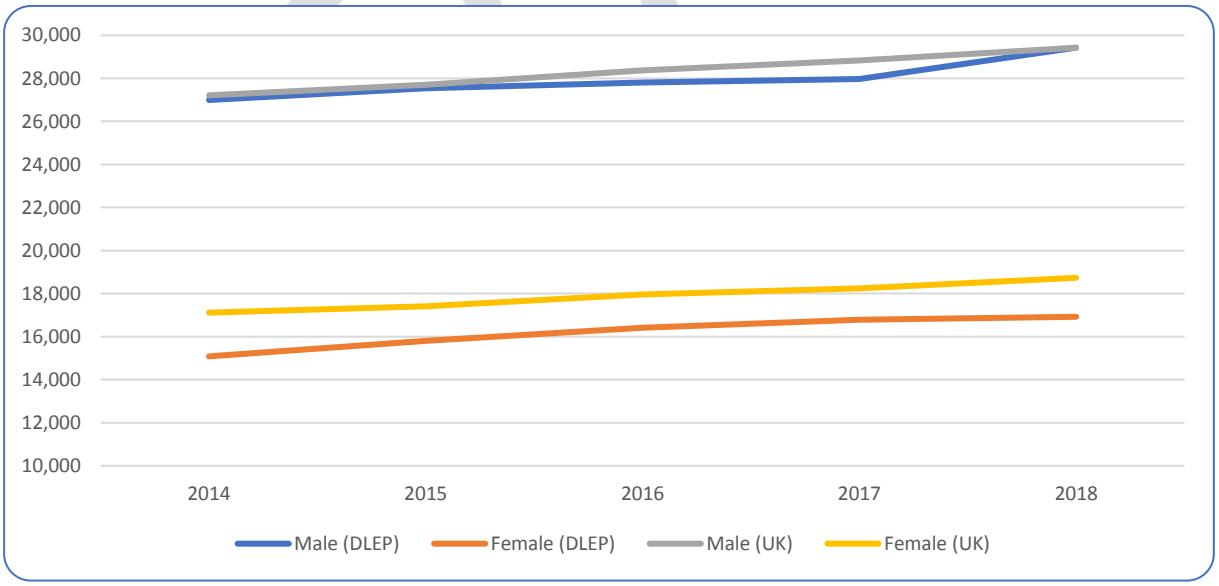


Figure 9. Average (£ - median) gross annual pay by sex (2014-2018). Annual Survey of Hours and Earnings – ONS

Figure 10 illustrates that a gender pay gap within DLEP exists across the earnings distribution, across all percentiles.

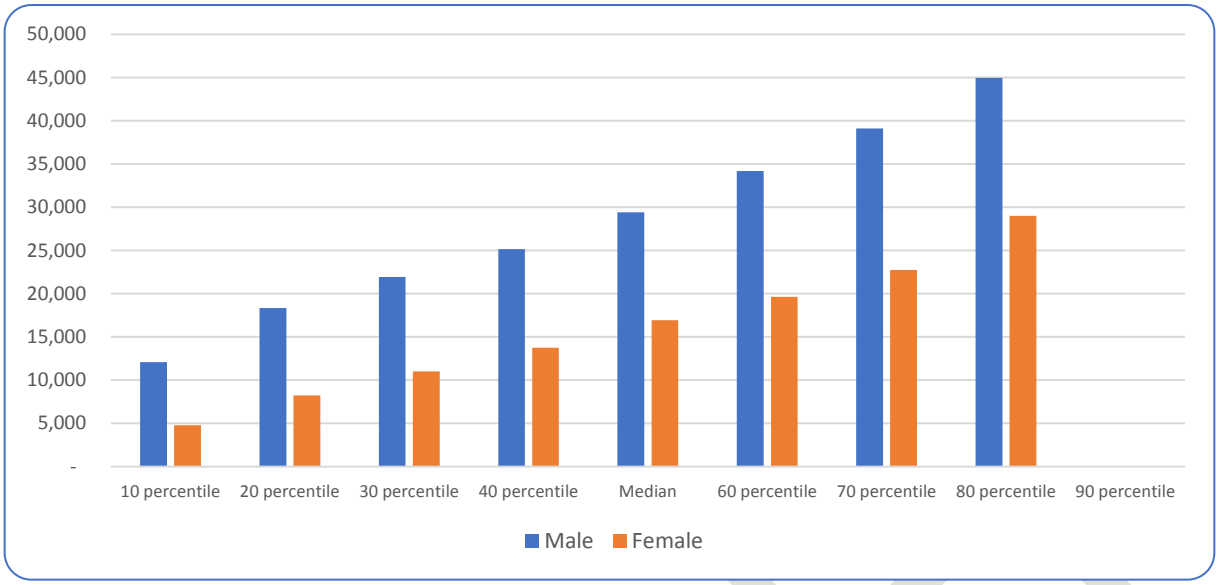


Figure 10. Average gross annual earnings (£) – 2018 (male/female). Annual Survey of Hours & Earnings ONS

The previous charts did not 'control' for the tendency for females to engage in more part-time working. Figure 11 shows that **within Dorset LEP female full-time workers tend to earn only 72% of their male equivalents.** However, for part-time work this relationship is switched – with females earning 12% more in part-time roles (although again noting that these estimates are subject to relatively wide confidence intervals which therefore mean these comparisons are within the 'margin of error' – this picture of female part-time workers earning more than their male counterparts may not be statistically robust).

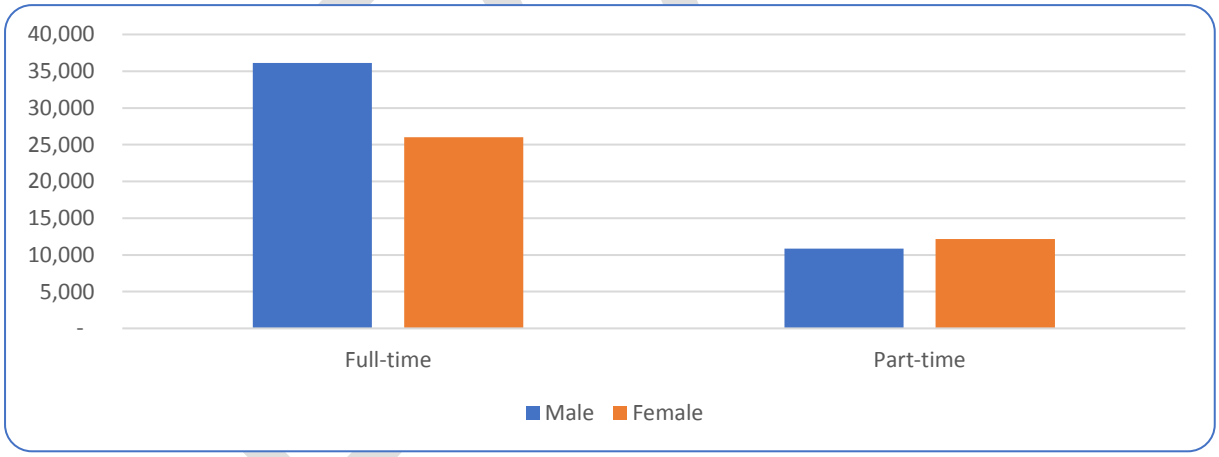


Figure 11. Average (median) gross annual earnings (£) by FT/PT – 2017 (DLEP - male/female). Annual Survey of Hours and Earnings – ONS

Finally, in terms of gender comparison we analyse the typical earnings for male and female workers in DLEP against the UK average across the earnings distribution – as shown in Figure 12 – in broad terms –male earnings match their UK counterparts across all parts of the earnings distribution. **In comparison, there is a consistent gap between female earnings in Dorset LEP and UK for each percentile (Figure 13).**

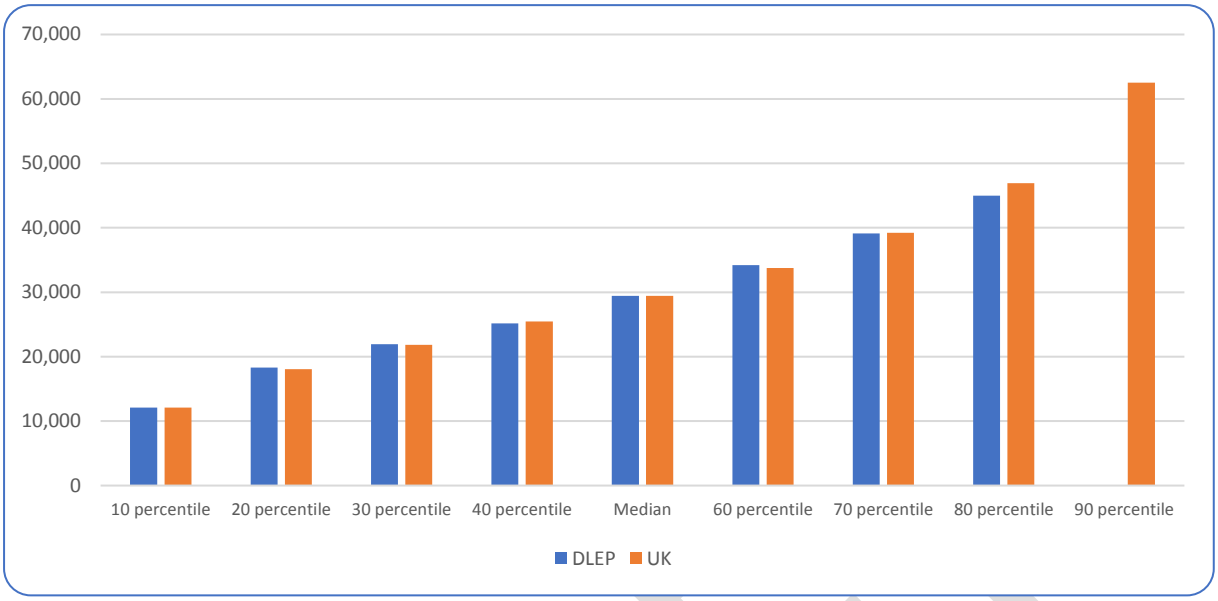


Figure 12. Gross annual earnings distribution (2018) – Male. Annual Survey of Hours and Earnings – ONS

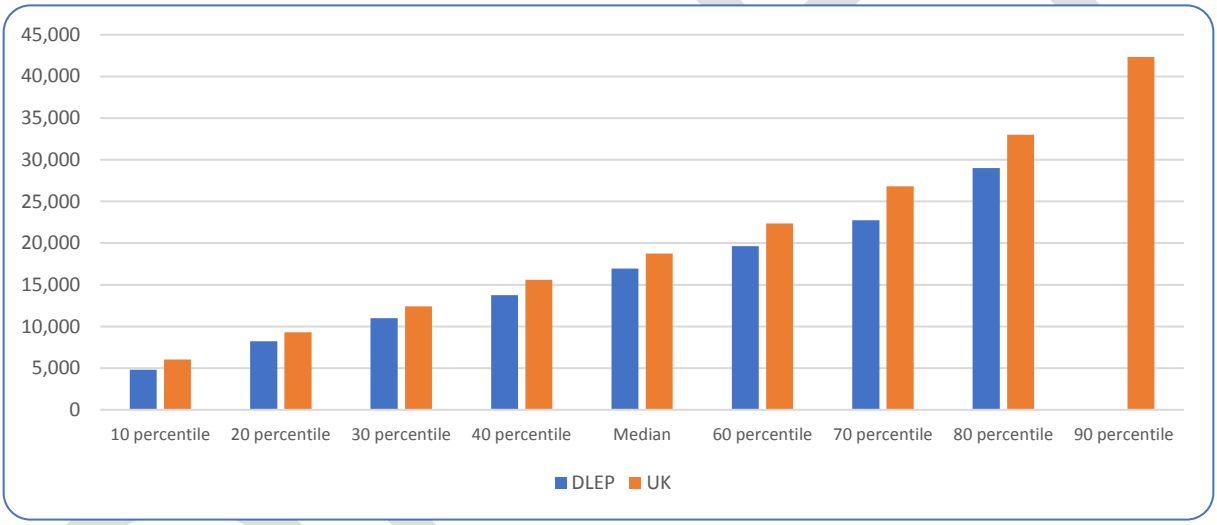


Figure 13. Gross annual earnings distribution (2018) – Female. Annual Survey of Hours and Earnings – ONS

Again, some caution in interpretation is needed because this implicitly reflects a slightly higher tendency for women to work part-time in Dorset LEP against the UK average. Latest estimates are that 44% of females in employment within DLEP work part-time, against 39.5% in the UK[10]. Further analysis shows that part-time working is more prevalent in sectors such as retail, accommodation & food services, education and health & social care – sectors which traditionally have high levels of female employment. Our analysis of job demand (as shown in subsequent sections) indicates that these sectors remain important sources of overall demand for labour within the Dorset LEP economy.

At institutional level, it is now a legal duty[11] for organisations employing over 250 staff to produce a report on their gender pay gap. These are publicly available (https://gender-pay-gap.service.gov.uk/) and are based on a comparison of a few key metrics including average hourly earnings (mean and median) and proportion of females in each pay quarter (including the highest 25% of earners in that organisation).

[10] Annual Population Survey (June 18-June 19) - ONS
[11] The Equality Act 2010 (Gender Pay Gap Information) Regulations

We have reviewed several reports submitted by larger (primarily public) organisations in the area. The overall view that we have formed is that there are consistent (although not unanimous) gender pay gaps in place in most organisations.

Presenting earnings data in a different way, using the DEFRA classification of Local Authority areas in terms of their urban/rural characteristics, we see earnings within most areas tend to be marginally higher than broadly comparable areas. The data is presented in relation to the Local Authority areas prior to the reorganisation/consolidation of the Local Government structure in April 2019.

Table 3. DEFRA classification of Local Authority areas in their urban/rural characteristics

	Broad Rural-Urban	Workplace-based	Residence-based
Bournemouth	Predominantly urban	102%	104%
Christchurch	Predominantly urban	95%	91%
East Dorset	Urban with significant rural	110%	107%
North Dorset	Predominantly rural	129%	110%
Poole	Predominantly urban	110%	102%
Purbeck	Predominantly rural	126%	85%
West Dorset	Predominantly rural	123%	108%
Weymouth and	Predominantly urban	67%	89%

As would be expected, wage levels increase through the early stages of working life, tending to peak for those aged 40-49 and then falling away for those aged 50+ (although this probably reflects a shift in working patterns for some i.e. reduction in working hours). For example, data at a national (UK) level shows that the average annual wage for those aged 40-49 was c15%-17% above the average wage for the whole workforce. Conversely, the average wages for those aged 22-29 tended to be c11%-12% below average levels. Economic theory suggests that as human capital develops (skills, knowledge, experience etc.) it gets rewarded with higher rewards (pay, wages etc.) – therefore this profile follows that expectation.

Industry Earnings

Data at an industry level within Dorset LEP shows that typical earnings across the different industries has been markedly different over the past 5-6 years. These are set out in the below tables. Median average earnings tend to be a better indicator of typical earnings within an industry (representing the mid-point in the distribution), but these are only partially available due to the data being supressed for confidentiality reasons. Therefore, the mean average is shown – although this is also not available in some years for some of the industries. The mean average is not an ideal measurement, given that it tends to be skewed by a small proportion of high earners. It is also important to note that the % change between 2012-2017 represents nominal increases, not real increase in typical wages i.e. considering inflationary effects. This is important because it indicates that for many industries, average real wage levels have declined over this 5-year period. This followed the broad national trend of muted (negative) real wage growth over this period.
Again, it is important to note that this data is associated with relatively wide confidence intervals, and care should be taken with regards to interpretation of the data. Two tables are presented below, showing average wages within Bournemouth & Poole, and one including Dorset CC area (encapsulating Christchurch at the time).

Table 4. Earnings by industry Bournemouth and Poole. Annual Survey Hours and Earnings – ONS

Bournemouth & Poole (annual pay – gross (£) – all employee jobs				
	Average (Mean - 2012)	**Average (Mean – 2017)**	**Actual change**	**% change**
Manufacturing	£31,742	£31,995	£253	0.8%
Water supply and waste	£26,362	£29,276	£2,914	11.1%
Construction	£28,719			
Wholesale and retail, motor	£17,941	£23,849	£5,908	32.9%
Transport and storage	£27,106	£33,844	£6,734	24.9%
Accommodation & food	£14,160	£14,799	£639	4.5%
ICT	£28,919	£27,891	(£1,028)	(3.6%)
Finance insurance		£38,757		
Real estate	£26,776	£23,673	(£3,103)	(11.6%)
Admin support services		£22,600		
Public administration	£26,679	£23,359	(£3,320)	(12.4%)
Education	£22,998	£21,229	(£1,769)	(7.7%)
Human health & social work	£23,598	£26,014	£2,416	10.2%
Arts and recreation	£14,125	£15,570	£1,445	10.2%

Table 5. Earnings by industry Dorset. Annual Survey Hours and Earnings – ONS

Dorset (annual pay – gross (£) – all employee jobs				
	Average (Mean - 2012)	**Average (Mean – 2017)**	**Actual change**	**% change**
Agriculture		£22,203		
Manufacturing	£25,078	£31,517	£6,439	25.7%
Water supply and waste	£34,302			
Construction	£23,967	£26,782	£2,815	11.7%
Wholesale and retail,	£19,182	£19,203	£21	0.1%
Transport and storage	£19,254	£20,791	£1,537	8.0%
Accommodation & food	£12,450			
ICT	£23,983	£27,920	£3,937	
Finance & insurance	£19,999			
Real estate	£26,668	£21,836	(£4,832)	(18.1%)
Professional, scientific	£29,804	£30,287	£483	1.6%
Admin support services	£17,677	£17,910	£243	1.4%
Public administration	£21,786	£23,129	£1,343	6.2%
Education	£20,736	£21,301	£565	2.7%
Human health & social	£21,192	£23,290	£2,098	9.9%
Arts and recreation	£14,990			

Underemployment/Overemployment

Estimating the proportion of Dorset LEP workforce that could be defined as being 'underemployed' is difficult because the available data tends to relate to those people who wish to work more hours, rather than the fact that they feel underutilised i.e. they are not fully utilising their skills and experience.

Therefore, the published data is only a partial representation of the scale of underemployment that may exist. In addition, the available ONS data only looks at data for the 23-33 age group – presumably in recognition that underemployment tends to have a higher incidence in the young. Based on this narrow definition, it is estimated that circa 6,300 individuals in the DLEP workforce are classified as 'underemployed'. The breakdown is shown in the below table.

Table 6. Estimated individuals 'underemployed'. Underemployment/overemployment April 17 to March 18

Estimated number of individuals 'underemployed'	
	23-33-year olds
Dorset Council (inc. Christchurch)	2,667
Poole	1,758
Bournemouth	1,830
Total	**6,255**

At a regional level (South West) it is estimated that 2.9% of people in employment in 2019 were on zero-hours contracts, marginally above the UK average. Within the UK, it is estimated that just below 1mn people work on a zero-hours contract. At a national level, the industries where zero-hours contracts are most prevalent include accommodation and food (23.7% of the total number of people on zero-hours contracts across the UK economy), health and social work (17.1%) and transport and other services (15.7%). Whilst this data does not exist at a more local level the DLEP economy does have a more marked incidence of these industries. Therefore, the inference (although not evidenced) is that the prevalence of zero-hours contracts may be higher in the DLEP economy due to its tourism industry and demographic characteristic of a more aged population – hence a higher number engaged in social care.
From an age perspective, the greatest prevalence of employees on zero-hour contracts (at a national level) is within the young – with c9% of those aged 16-24 on such working arrangement. The estimated breakdown in shown in Figure 14.

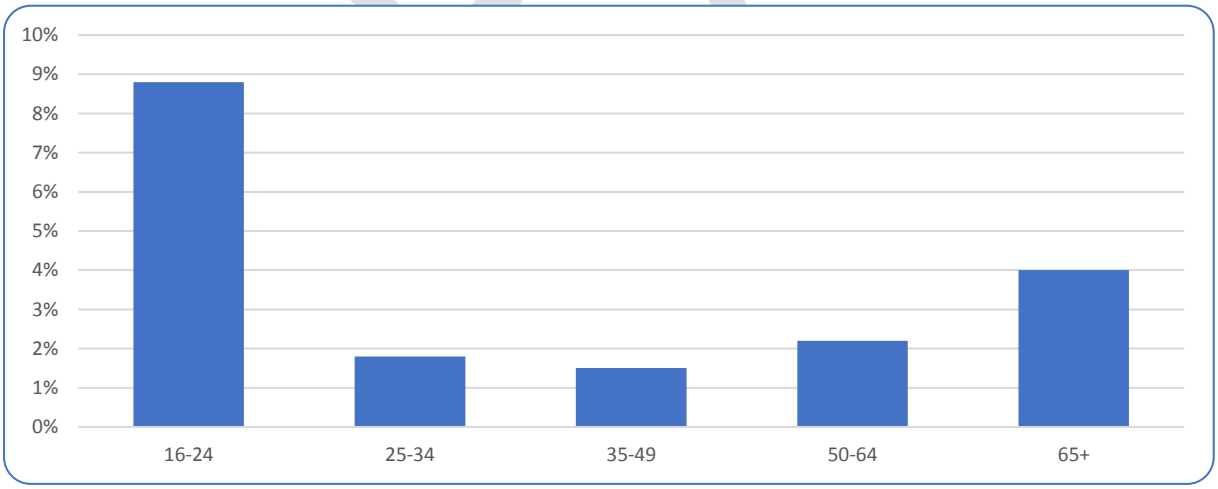


Figure 14. Share of employees on a zero hours contract by age group (UK – Apr-Jun 19). Statista
Finally, looking at the data in another way, ONS data suggests that 3.5%-4% of the local workforce are in what is defined as 'non-permanent' employment. Across the DLEP area this constituted c13,400 individuals. Within BCP, it is estimated that 3.8% of workforce are in non-permanent employment, with 3.5% within the Dorset Council area. This compares to 4.4% nationally[12].

[12] Annual Population Survey – ONS (Sept 19)

Demographics and Population Growth

The current and future projected demographic structure of the local population in Dorset LEP is providing an important contextual perspective is this work. Dorset is among the most aged parts of the UK (in fact Dorset Council has the greatest proportion of its population aged 65+). 1-in-4 of the DLEP population is aged 65+, compared to 1-in-5 of the national population. Conversely, 15.5% of the DLEP population is aged under 15, compared to 17.9% nationally and 59.8% is of working age, compared to 64.1% at a national level. The figure is even lower in the Dorset Council area, where only 56.8% of the population is of working-age. As a consequence, the simple conclusion is that there is less labour resource available within DLEP than typically found elsewhere. This provides a fundamental context for this work.

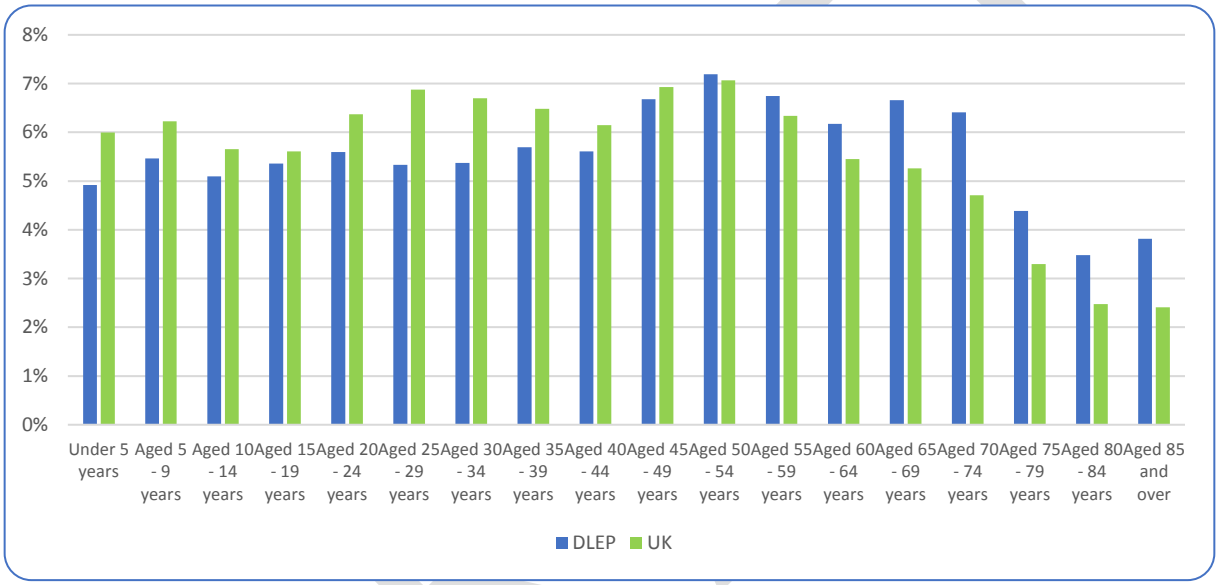


Figure 15. DLEP age profile versus national average (5-year age bands). 2017-based trend-led population projections – ONS

The employment rate – the proportion of people who are in employment – falls (as expected) as people either approach or reach retirement age. According to latest statistics, 11.4% of those aged 65+ in the DLEP area are in employment. This partly reflects the gradual change in State Pension age. The employment rate for those aged 50-64 was 75.1%, compared to 89.5% for those aged 35-49 – indicating a drop-out in labour engagement in the 50+ age group[13].

According to the ONS's population projections, this situation is expected to be exacerbated over the coming years as the population continues to age. This has been known as a "demographic time-bomb" expected to occur over the next 15 years and account for significant replacement labour demand as discussed in following sections and addressed in the Dorset People and Skills Plan.

[13] Annual Population Survey – ONS (June 19)

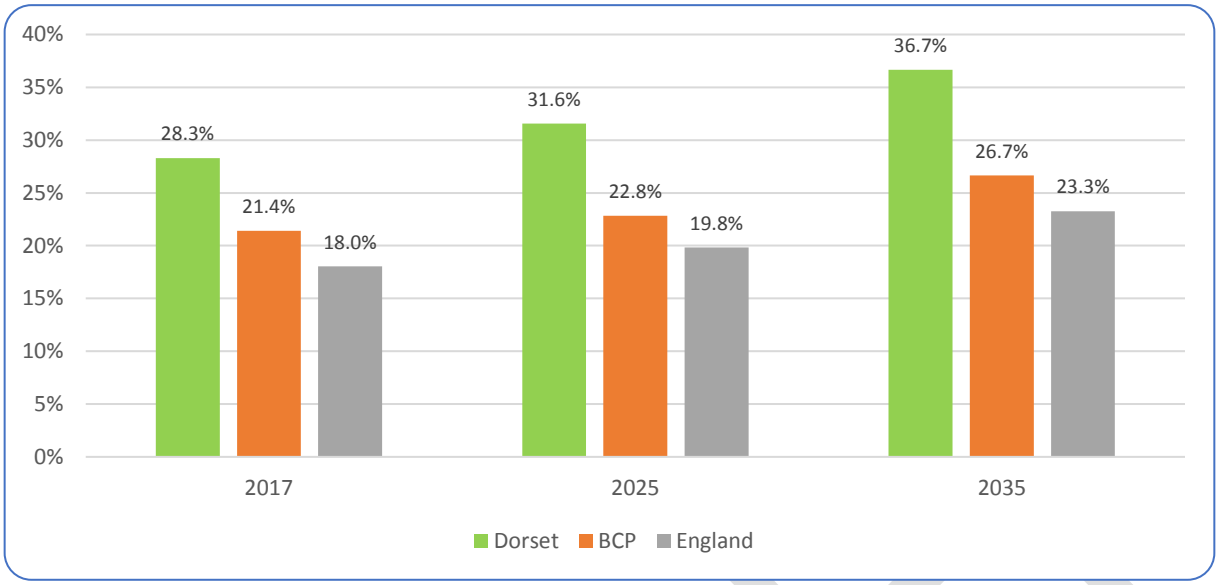


Figure 16. Proportion (%) of population aged 65+ - current estimated and projected. 2017-based trend-led population projections – ONS

In terms of understanding the proportion of the labour market that is expected to draw closer to retirement age (and therefore represent a loss of productive resource to the economy), then **Dorset also has a much higher proportion of its population aged between 50-64. By 2025, over 40% of the population in the Dorset Council area will be in this age bracket.**

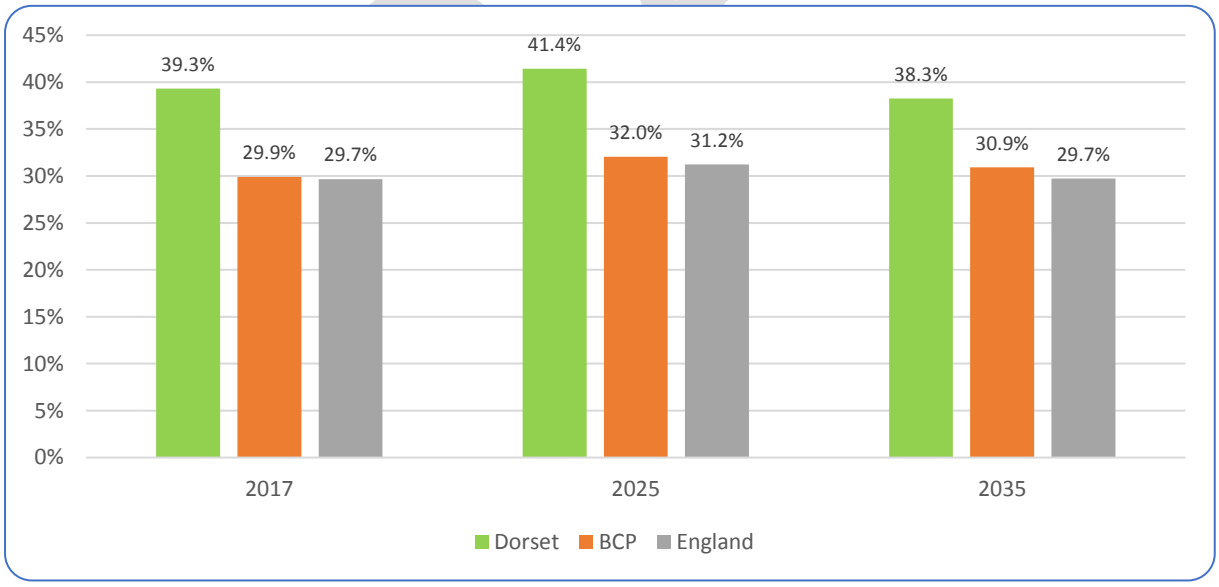


Figure 17. Proportion (%) of population aged 50-64 - current estimated and projected. Source: (2017-based trend-led population projections – ONS)

It could be argued that this presents a 'demographic risk' to the DLEP economy – representing a vulnerability in the local labour market. Analysis by Localis shown in Figure 18 illustrates that due to their demographic structure – most notably the lower proportion of the population that is working-age – many areas within the DLEP area are considered to face a higher demographic risk.

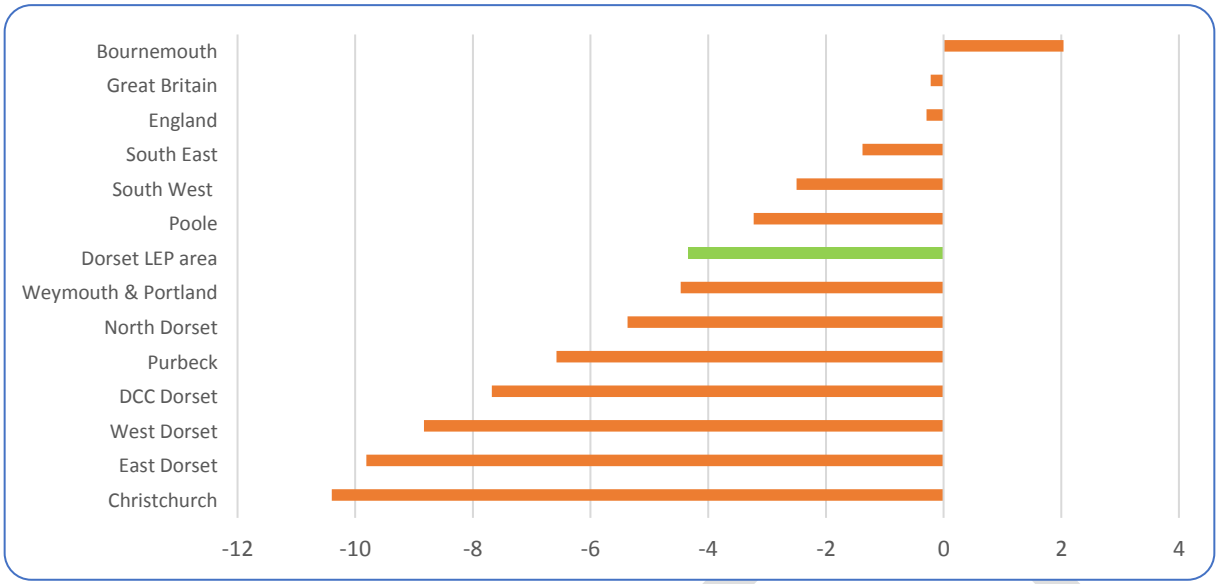


Figure 18. Demographic risk - distance (percentage point) from national average % non-working age. Localis/Dorset Council

The same form of analysis has been undertaken in terms of the 'skills risk' across the DLEP area. In this instance, the proportion of the working age population with an NVQ3+ qualification is taken as a proxy for skills (recognising that it can only act as a proxy for the skills base). Again, this is seen as a potential vulnerability in the labour market and set against national average. The qualification levels of the working-age population are commented on later in this report.

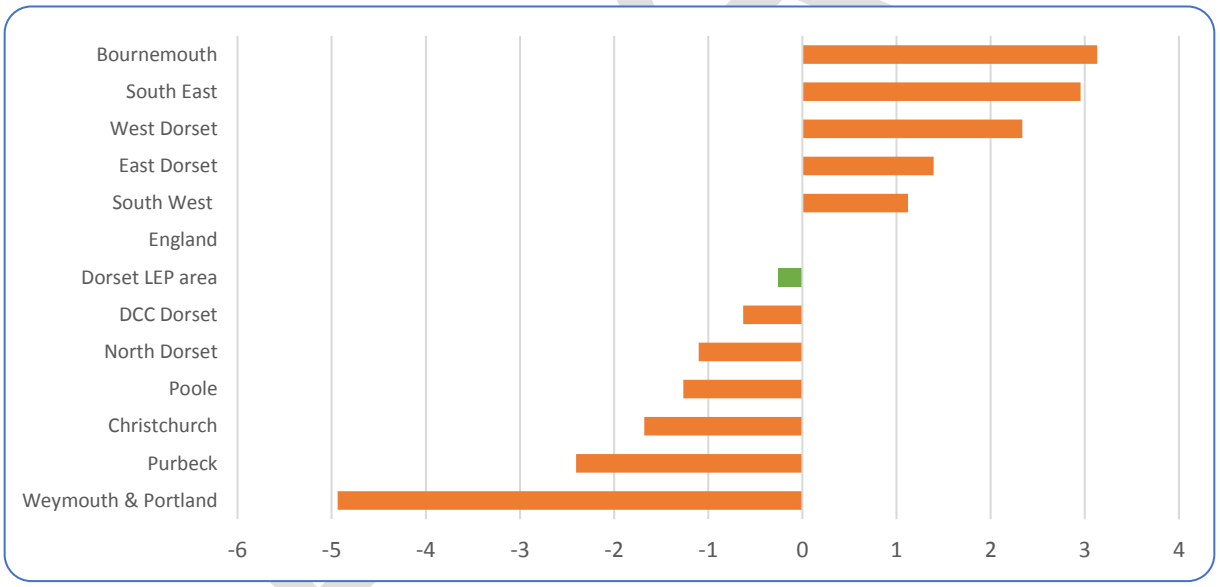


Figure 19. Skills risk – distance (percentage point) from national average – NVQ3+. Localis/Dorset Council

Figure 20 shows the projected number of **16 and 18-year olds** in BCP and Dorset Council areas over the next 20 years. It indicates that the there is a discernible spike in the number of 16-year olds expected in 2028 (broadly around **2,000 more than current levels across the Dorset LEP area**), with that 'spike' moving through to the number of 18-year olds two years later.The gradual increase in expected number of 16-year olds raises questions from a supply perspective, in terms of volume. The demographic projections indicate that the post-16 providers will need to potentially cater for an increase in the number of young people entering the system i.e. the demand for places/courses will increase over the next 5-10 years based on demographic considerations alone.

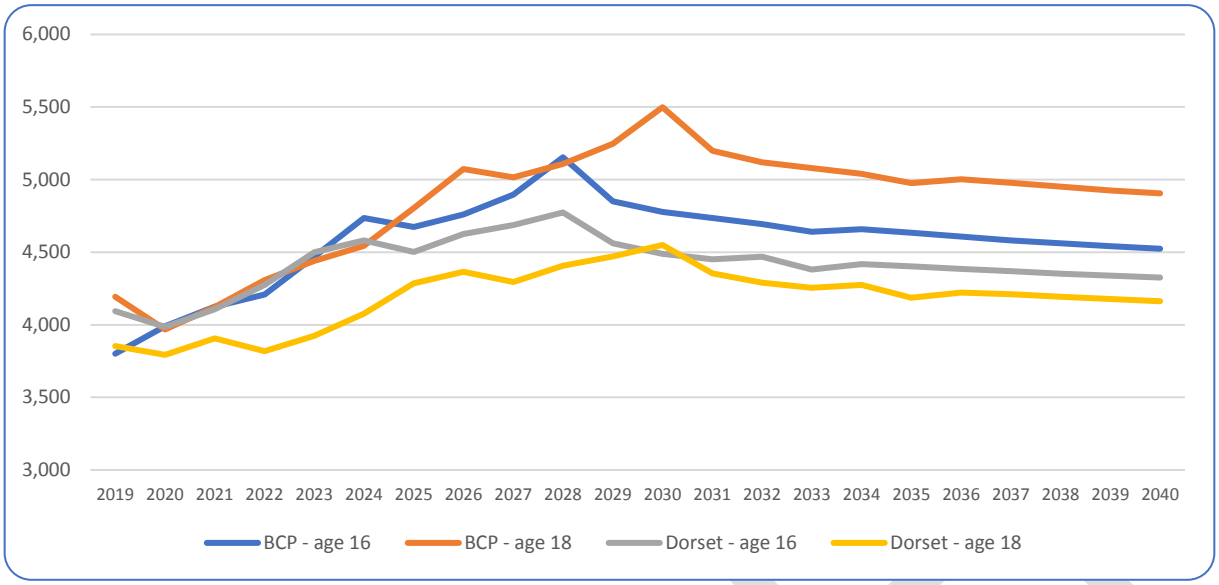


Figure 20. Projected number of 16 and 18 year olds (2019-2040). ONS population projections (2016 based)

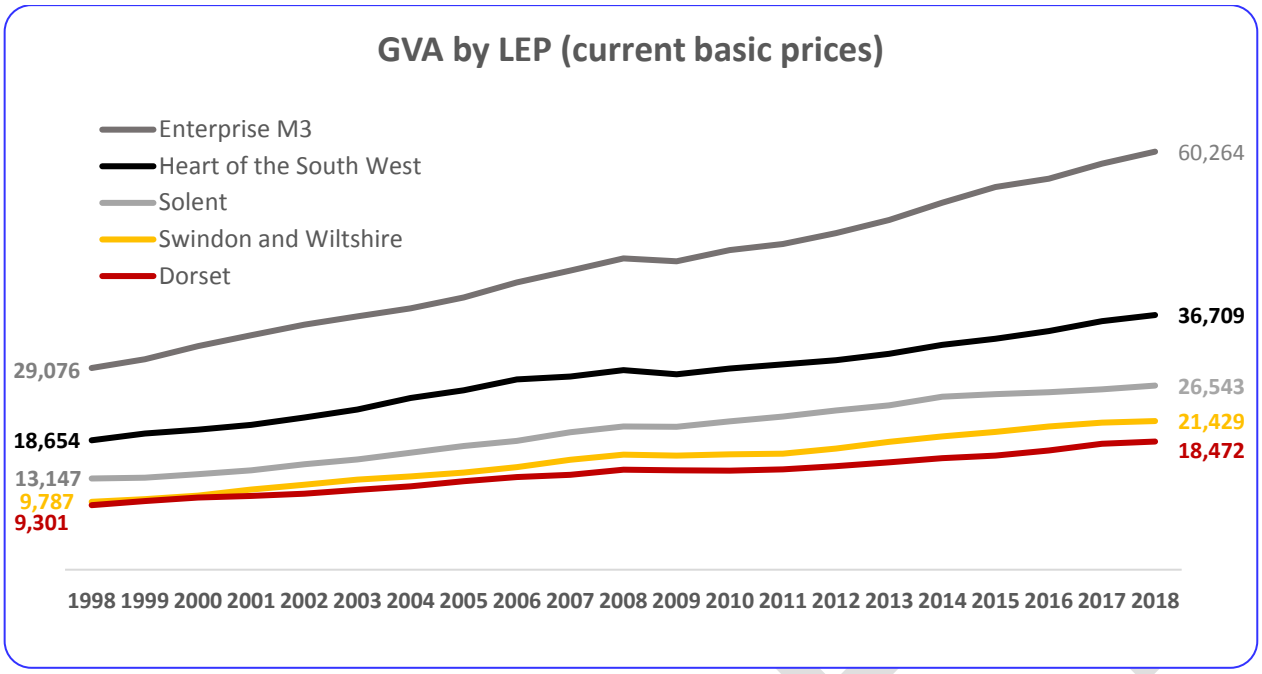
Labour Productivity

In the context of this analysis of labour market characteristics and people and skills agenda in Dorset LEP, labour productivity is central as it indicates the positive 'outputs' in terms of goods and services produced in the economy as a result of the 'inputs' i.e. capital and labour. Within a landscape of what has been a "near-full employment" prior to the crisis and the desire to protect the natural resources of Dorset, productivity becomes more important because of the need to produce more with existing resources. At a firm-level, productivity is fundamental because it relates to competitiveness of businesses.

> *"Labour productivity is defined as the quantity of goods and services produced per unit of labour input, for example, per hour worked or per filled job. It is one of the most widely used measures of economic performance.* ***Productivity matters because increasing productivity is critical to increasing economic growth in the long-run.*** *Strong economic growth will generally mean an improvement in living standards.*
> ***Economic output can only be increased by either increasing the amount of inputs or by raising productivity****."*[14]

Productivity measures are used to indicate how well the human and physical resources are utilised to generate economic growth. Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector. Labour productivity is a measure of how effective (productive) the labour 'input' is. **Labour productivity – as measured by Gross Value Added (GVA) per job or per hour – is lower in Dorset LEP area than the UK average.**
The GVA of Dorset and its neighbouring enterprise regions over the past 20 years are shown in Figure 21, illustrating a continued, albeit slower growth for the region. Dorset's total GVA has doubled over this period reaching £**18.5 bn**[15] in 2018. This is measured in current prices, therefore encapsulating inflationary effects.

[14] Labour Productivity, ONS 2019
[15] Regional Economic Activity Regional economic activity by gross domestic product, UK: 1998 to 2018



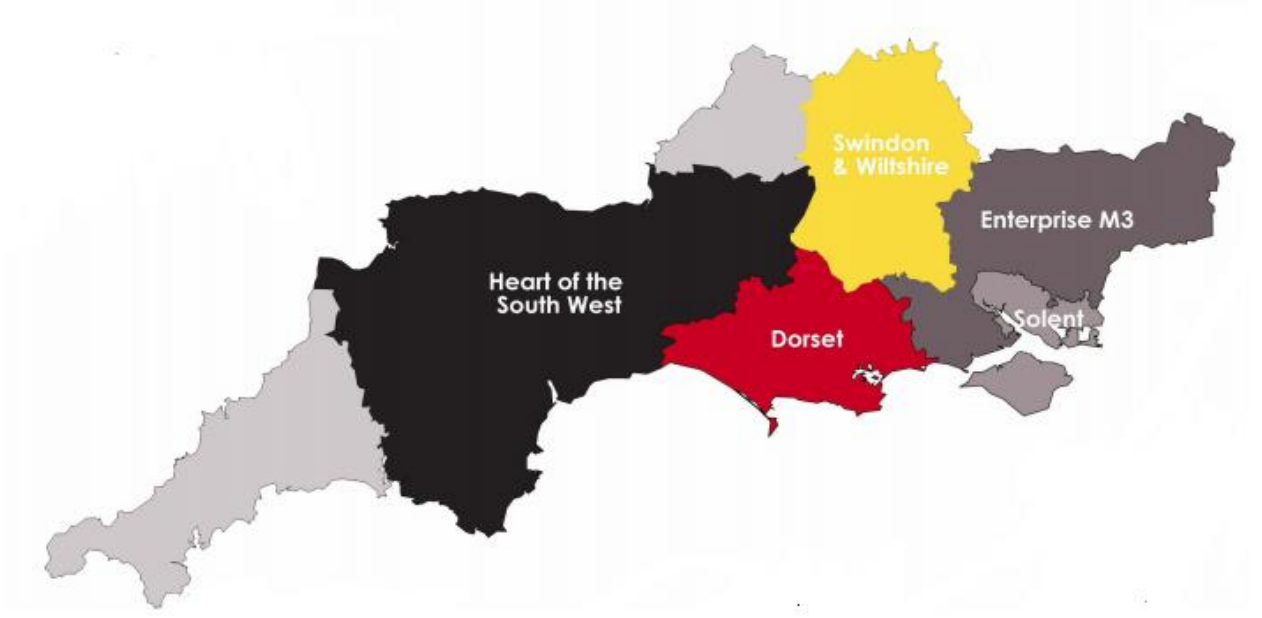


Figure 21. Enterprise Regions: Gross Value Added (Balanced) at current basic prices. ONS Regional gross domestic product (GDP)

Gross Value Added (GVA) per hour is a preferred indicator of regional labour productivity when benchmarking regions differing in geographical size, economic output and population. It measures productivity by dividing the products and services by the labour input (hours worked) to create it. In Dorset the **GVA per hour is persistently lower than the national average** - equating to circa £3.5 difference on average over the past few years (Figure 22) with the gap being more pronounced in Dorset Council area (Figure 23). **This is called the 'output gap' and for Dorset LEP it is estimated to have costed the economy £2.3 bn in 2018**. Addressing the output gap is a key focus of the Dorset's Local Industrial Strategy.

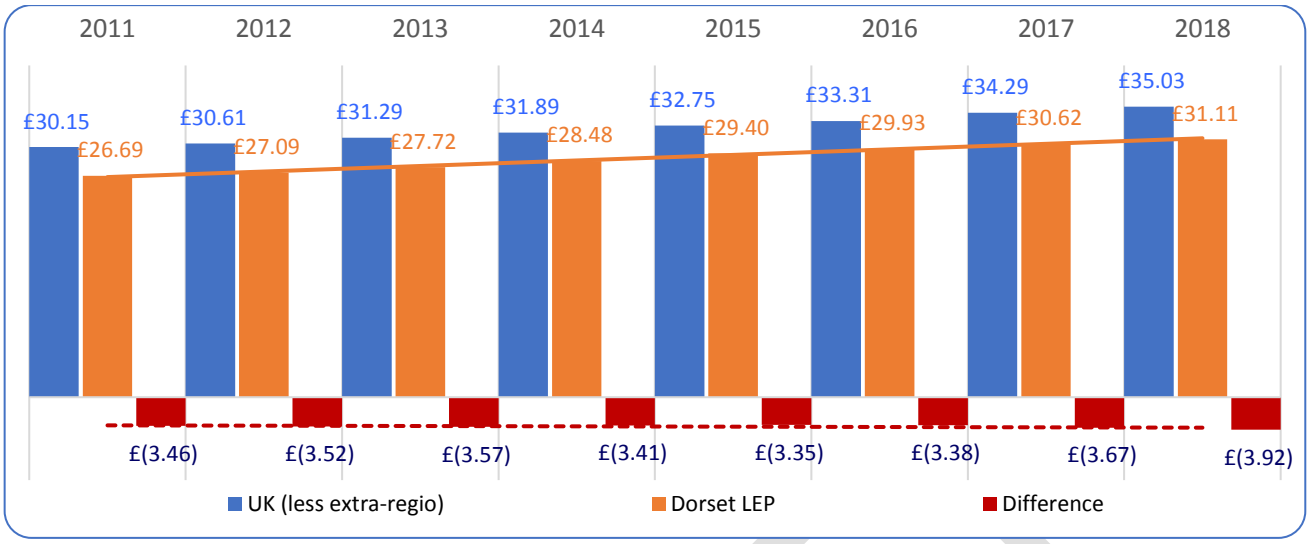


Figure 22. Nominal (smoothed) GVA per hour worked (£) 2011 - 2018. ONS Sub-regional Productivity Feb 2020

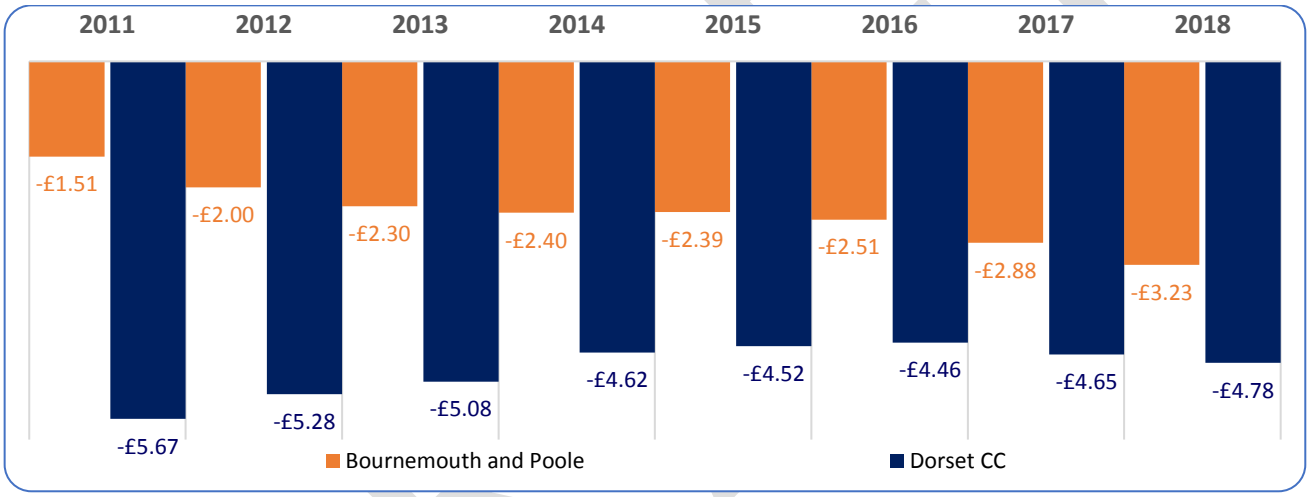


Figure 23. GVA per hour (£) – differential against UK average. ONS Sub regional productivity: labour productivity indices by local authority district, 28 February 2020 release

Looking at productivity from a different angle – using the DEFRA rural/urban characteristic to compare the (old) local authority districts with similar comparators elsewhere - shows that as measured on a 'per job' basis the gap tends to narrow. That is, the 'output gap' narrows when compared against areas with similar geographic/demographic characteristics. It is well known that the UK average is 'distorted' by the major urban areas, predominantly London. On this alternative measurement, labour productivity in Weymouth & Portland still appears low in relative terms.

Table 7. Broad Rural-Urban Classification and Productivity. DEFRA

	Broad Rural-Urban Classification	Productivity (per workforce job)
Bournemouth	Predominantly urban	95%
Christchurch	Predominantly urban	109%
East Dorset	Urban with significant rural	95%
North Dorset	Predominantly rural	97%
Poole	Predominantly urban	89%
Purbeck	Predominantly rural	116%
West Dorset	Predominantly rural	86%
Weymouth and Portland	Predominantly urban	74%

From a (macro) policy perspective, the productivity differential provides important context. **There are myriad of reasons why labour productivity appears to be lower in Dorset LEP against the UK average (although not necessarily against many other areas within the UK). Skills may be one explanatory reason, although – as shown in this next section – that may relate more to the utilisation of skills rather than the skills base per se.**

Productivity and skills – a brief synthesis of evidence

This brief section looks at the evidence linking skills and productivity. It is an area of significant research and this section aims to provide a brief overview of the key findings. Consequently, we have reviewed a small number of papers that act as a synthesis on the matter[16].

Since the financial crisis in 2007/08 the productivity gap between the UK and other developed countries has widened, although employment rates remained relatively strong. This has led to the so-called 'productivity puzzle' or 'conundrum'(see Figure 21 for Dorset). At a regional, or sub-regional, level only a small number of English sub-regions experienced real productivity growth in the post-recession period, with the majority actually experiencing a decline.

The working assumption is that when discussing the links between skills and productivity, the starting premise is than an investment in skills is likely to have a positive effect on productivity levels and growth rates, as shown by extensive macro and micro literature on the returns to education.

In broad terms, this is shown on Figure 24, illustrating at a LEP-level the relationship between the proportion of working-age population with NVQ4+ qualifications and GVA per hour (indexed against UK average).

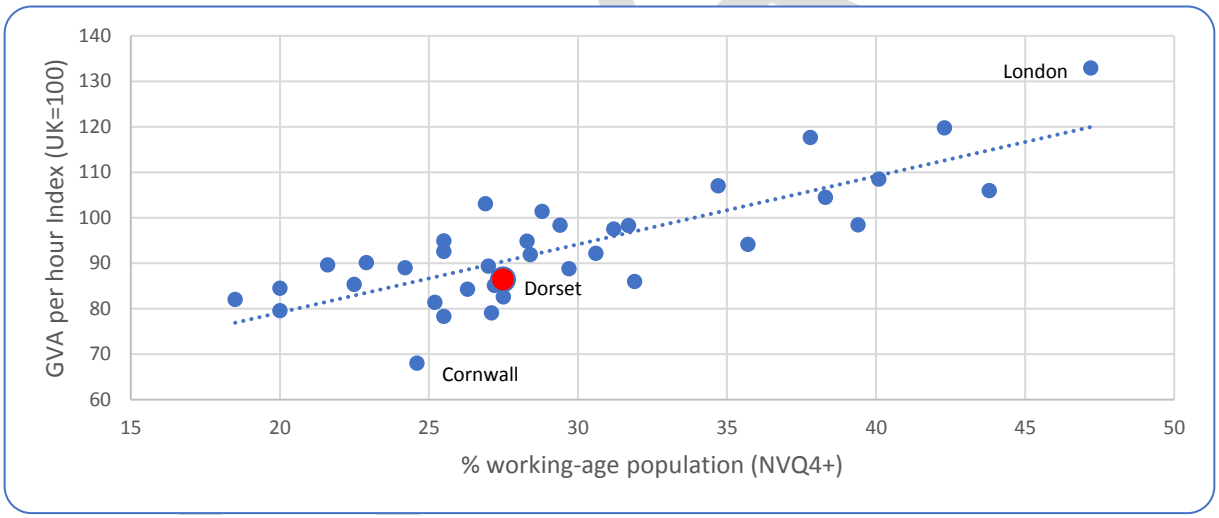


Figure 24. Proportion of working-age population with NVQ4+ qualifications and GVA per hour

Poor skills utilisation, alongside poor management quality, is generally held to be a central part of the UK's productivity problem.

While the link between poor management, labour productivity, and skills mismatch is not well established, because of a paucity of literature that has examined all three factors together, a recent study by the OECD has provided some fresh insights[17]. Theoretically, they propose two main channels via which skills mismatch can impact firms: through within firm productivity and through inefficient allocation of resources across firms. In terms of within-firm productivity, the OECD finds that

[16] For example, 'Skills and Productivity – evidence review' – Productivity Insights Network and 'Measuring Regional Skills Mismatches and access to jobs' – Productivity Insights Network (2019)
[17] 'Better Use of Skills in the Workplace – why it matters for productivity and local jobs' – OECD (2017)

differences in managerial quality can explain the relationship between underqualification and under skilling and labour productivity. That is, that better managers would appear to be more effective at matching the qualifications, knowledge, skills and competencies of a worker to those required by a job.

The research also identified a strong negative relationship between over skilling and labour productivity via the 'allocative efficiency channel'[18]. The authors suggested that this could, in sectors and economies with a high share of over skilled workers, be the result of skilled labour becoming trapped in low-productivity firms, making it more difficult for more efficient firms to expand and gain competitive advantage. This recent research certainly highlighted the importance of managerial capability in fully utilising the skills base in a local area.

National skills policy, particularly in England, arguably exacerbates this with its emphasis on skills supply. Policy is premised on the assumption that delivery of high-level skills will stimulate demand for them, and that enhanced productivity will follow. Current UK productivity levels, which follow decades of supply-focused skills policy, evidences that this is demonstrably not the case.

Overall, the UK has a relatively good performance in skill levels and educational attainment, as compared to other EU and OECD countries. The two significant exceptions are adult participation in lifelong learning, and young adult literacy and numeracy skills. This section covers a brief overview of the evidence on skills in the UK, starting with early-life (pre-school) skills and policy programmes, moving on to primary and secondary school, then considering higher education, and finally adult skills. Where relevant, we discuss the evidence of regional disparities – although there are gaps in that evidence.

Early childhood education and productivity

The literature and evidence on early years education has highlighted the importance of skills acquired during early childhood. In particular, the cognitive and non-cognitive skill formation in early childhood lays the foundation for further skills development later in life, and due to their complementary, it becomes increasingly difficult to remedy an early disadvantage at older ages. This is true of both foundational cognitive skills, and the softer, social, "non-cognitive" skills, which have been shown to be particularly important in the acquisition of future skills, and in later educational and labour-market outcomes.

Comparisons across the UK regions show that there are significant differences in early education opportunities across locations. The South East has the best educational outcomes, as measured by the percentage of five-year-olds eligible for free school meals who achieve a good level of development at the end of the Early Years Foundation Stage. This is likely to be due to greater availability of good-quality childcare in the region. However, there are significant gaps in the literature on the spatial patterns of early childhood education in the UK, and in particular, on the reasons for these spatial disparities, for instance, in the uptake of free pre-school places.

Primary and secondary schooling and productivity

A large evidence base across several disciplines has investigated the determinants of school performance and educational outcomes. The focus has mainly been on parental background, availability and quality of teachers, school policies and organisational forms, and school resources. At the regional level, the literature has analysed localised area effects, and whether area-specific

[18] Allocative efficiency occurs when there is an optimal distribution of goods, services, resources taking into account the consumer's preferences.

characteristics affect student educational outcomes. However, only small effects were found, with family background having a much larger effect on the educational attainment.

More recently, the literature has analysed the role of teacher quality in determining schooling outcomes and has found that good teachers can close achievement gaps, particularly for students from disadvantaged backgrounds. This is highly relevant from a regional perspective, because teacher mobility has been shown to have a significant regional dimension, with teachers often choosing to work in locations that are close to their original home district, and good teachers (those with greater classroom experience and demonstrate innovative practices, better qualifications, qualifications in the subject taught) tend to be more mobile. In addition, schools in deprived communities often find it difficult to recruit and retain qualified teachers, as well as provide good-quality training, exacerbating the regional differences in educational outcomes.

Another emerging area of policy interest is the extent to which the quality of careers advice in schools differs across locations, and whether improving careers advice, for instance, by increasing the number of hands-on experiences of the workplace, could help to raise educational outcomes and employment prospects. There is evidence that the quality and availability of work experience placements varies considerably across regions.

Higher education and productivity

One determinant of the regional imbalance in skills occurs after graduation, with a larger proportion of graduates moving to large, dense, cities with good labour market prospects. In addition, the most mobile graduates are the highest achievers, leading to an accumulation of skills in larger cities like London. In terms of gaps in literature, much of the evidence focuses on cognitive skills (reading comprehension, numerical skills, etc.), but there is significant evidence of the importance of non-cognitive skills (personality, interpersonal skills, attitudes to risk, adaptability) for both educational and job-related outcomes. There is a large amount of research on post-HE migration and sorting arising from cognitive skills, but very little research on sorting on non-cognitive skills.

Adult skills and productivity

Learning beyond early formal education tends to be higher for wealthier individuals, and those with previous experience of learning (for instance, those with a higher education degree). The propensity to participate in later-life learning is thus strongly influenced by earlier education experiences, which include the accumulation of non-cognitive skills (Foresight, 2017). **Participation in learning declines with age, particularly among men, and there are lower participation rates among less wealthy socio-economic groups, and those whose jobs are most at risk from automation.**

The UK's overall performance in terms of adult skills is low by international standards, with numerical proficiency in England and Northern Ireland being significantly below the OECD average.

Both the academic and policy literature focus is on the supply side, i.e., how to increase the supply of education or training. The demand side is a neglected area of research. This is particularly relevant as there is evidence that workers in the UK have become increasingly overqualified for existing jobs. An interesting and growing area of research is the idea of a **"skills ecosystem",** which argues that policy interventions should address both the supply and demand side, and take into account firm productivity, improving job satisfaction, and stimulating investment and innovation.

Social Mobility and Inclusive Growth

Among the spectrum of factors closely related to productivity, the important issues of inclusive growth, social mobility and aspiration are at the forefront of the Dorset Local Industrial Strategy with a focus on promoting inclusive growth and ensuring that the benefits of economic growth are available to all. Social mobility is currently a significant policy focus for UK Government policy as well – as demonstrated by the establishment of the Social Mobility Commission.

Improving individuals' skills is one – if not the primary route of positively improving life opportunities and outcomes. At a local level, creating a more equitable society where opportunities are not limited by socioeconomic circumstances is a key focus for local partners. Moreover, as highlighted in the Labour Productivity section, the acquisition of skills throughout the lifespan facilitates readiness for the future, better labour-market outcomes and productivity, while early disadvantage becomes increasingly difficult to remedy later in life.

However, the measurements of social mobility indicate some difficulties in the Dorset LEP area. As the below table shows, some areas – most notably Weymouth & Portland – do not perform well in terms of social mobility. The measure of social mobility applied by the Commission covers factors such as proportion of children eligible for free school meals, attainment against expected attainment, % of population earning below the living wage etc.

Table 8. Dorset areas Social Mobility Ranking. Social Mobility Commission

	Rank (out of 324 local authority areas in the UK)
Christchurch	127
East Dorset	147
Purbeck	175
West Dorset	187
Poole	198
North Dorset	216
Bournemouth	245
Weymouth and Portland	322

Conclusion – Economic Context

This section has served to describe the broad economic story that sets the wider context for this skills analysis. The messages that emerge are that the DLEP area has enjoyed a relatively strong labour market over the past decade, marked by historical highs and lows for employment and unemployment respectively. The post-recession period has also been characterised by weak wage growth.

A wider economic characteristic has been relatively slow (low) productivity growth amongst most developed economies, including the UK. Much research and policy focus has been paid to why productivity growth seems to have slowed over the past decade, with many theories being presented. This trend has been mirrored in the DLEP area. One possible cause has been that businesses have tended to use the 'cheap' labour in place of capital – business investment levels have been low by historical standards. This could explain why measurements of labour productivity growth has been muted - output growth (GVA) has not grown strongly (the numerator) whilst the labour input (either jobs or hours - the denominator) have. The combination of these two factors has resulted in sluggish labour productivity.

Demand for Labour and Skills

Discussion points
• The Dorset industries and occupations mix – employment levels and productivity • Future projections - predicted growth in jobs and productivity • Current and expected employer demand within industries, occupations and skills • Skills shortages

Introduction

In broad terms, future demand for labour (in terms of scale) will be driven through two components:

- **'Expansion demand'** – new jobs that could be created by growth in the local economy
- **'Replacement demand'** – replacing those who are expected to leave the labour market

The dynamics of both drivers are uncertain. In the case of expansion demand, the future pathway for the national and Dorset economy is inherently uncertain, affected by macro (global trends, UK competitiveness, structural change etc.) and micro (local competitiveness) factors. In the case of replacement demand, ultimately this will depend on individual choices. For example, whether an individual chooses to continue working or change job roles – dependent on personal and/or economic circumstances.

While these factors are difficult to model, we explore the available evidence of current and future demand for labour and skills in the Dorset economy by analysing the industrial and occupational structure and the expected future changes including those driven by the demographic aspects discussed in the previous section and their likely impact on the future workforce.

The analysis also focuses on information from local employers through labour market intelligence illustrating the types of vacancies advertised by employers and further survey-based and anecdotal feedback regarding the recruitment/retention/skills issues experienced by Dorset LEP employers.

Industries in Dorset

At the time of writing, the economic effects of the global pandemic and closedown caused by the COVID-19 virus are yet unknown. It is likely to cause damage to most sectors, where performance hinges on factors such as household disposable income and face-to-face business activities. The medium-to-long term impacts are certainly unknown at this time. Labour markets have markedly plummeted with vacancies advertised in March 2020 almost half of the levels over the same period in previous years. The following reflections are therefore to be taken with caution. Yet they represent long term trends that are likely to come into play after the effects of the outbreak subside.
The past developments in employment and growth within the sectoral and occupational structures can act as one indicator of future demand, although this is certainly not a perfect exercise, particularly in light of recent economic developments. Past trends do not necessarily translate into future developments. However, it tends to be the approach in most economic models, based on projections of near-term trends. In addition to this analysis we are monitoring the labour market developments and producing regular updates to stakeholders.

While the industry profile in Dorset broadly aligns with the UK broader picture, an overall comparison of the proportion of employment and productivity rates within each industry in the region and nationally (Table 9) shows certain sectors are bigger in both employment and output when compared to the rest of the UK. Among these are finance and insurance, construction, healthcare, accommodation and food services, real estate, arts and entertainment. Where Dorset has lower than the national levels of employment and output are sectors such as transport, ICT, professional and administrative activities.

The charts that follow visually illustrate the current industry mix in Dorset LEP by the size and proportion of employment (Figure 25), and the size of contribution to the Dorset's £18.5 bn GVA (Figure 26). This comparison demonstrates that labour productivity differs across industries and there is not necessarily an exact match between the proportion of employment and output (GVA).

For example, while the human health and social care sector provide 16% of the total employment within the Dorset LEP area, its output constitutes 9% of total GVA. In comparison, finance and insurance contributes 8% of the total output, while employing 4% of those in employment in Dorset. This observation raises questions on the industry mix and its link to overall productivity and further reflections are offered at the end of this chapter - **Error! Reference source not found.**

Regarding the historical changes in employment within industries, Figure 27 illustrates that healthcare and accommodation & food were the largest growing sectors in terms of employment over the past few years, each employing 6000 more people in Dorset in 2018 compared to 2015. Other sectors that have increased employment numbers over the same period were arts and entertainment, construction and property, ICT, education and utilities, while employment numbers declined in retail, professional services, and transport and motor trades.

Next, we look at vacancies as a proxy for employment demand and future industry projections before providing reflections on demand within the Dorset LEP industries.

Table 9. Employment and GVA (£2018m) comparison DLEP and UK. ONS

	Employees 2018			GVA		
	Dorset LEP	% of all	Proportion Employment vs UK (ppt)	GVA	% of all	Proportion GVA vs UK (ppt)
Agriculture, mining, electricity, gas, water and waste	6,800	2.0%	0.0 —	740	4.0%	-0.3 —
Manufacturing	28,000	8.4%	0.3 —	1,862	10.1%	0.2 —
Construction	18,000	5.4%	0.7 ▲	1,383	7.5%	1.4 ▲
Wholesale and retail trade; repair of motor vehicles	52,000	15.5%	0.3 —	1,873	10.1%	-0.5 ▼
Transportation and storage	9,000	2.7%	-2.1 ▼	343	1.9%	-2.3 ▼
Accommodation and food service activities	35,000	10.5%	3.0 ▲	711	3.8%	1.1 ▲
Information and communication	9,000	2.7%	-1.5 ▼	677	3.7%	-3.4 ▼
Financial and insurance activities	14,000	4.2%	0.8 ▲	1,448	7.8%	0.8 ▲
Real estate activities	8,000	2.4%	0.7 ▲	3,452	18.7%	5.5 ▲
Professional, scientific and technical activities	23,000	6.9%	-1.7 ▼	1,138	6.2%	-1.6 ▼
Administrative and support service activities	19,000	5.7%	-3.3 ▼	489	2.6%	-2.7 ▼
Public administration and defence	13,000	3.9%	-0.4 —	953	5.2%	0.3 —
Education	28,000	8.4%	-0.4 —	1,008	5.5%	-0.3 —
Human health and social work activities	54,000	16.1%	3.0 ▲	1,669	9.0%	1.4 ▲
Arts, entertainment and recreation & other services	18,000	5.4%	0.9 ▲	726	3.9%	-0.2 —
	334,800			18,472		

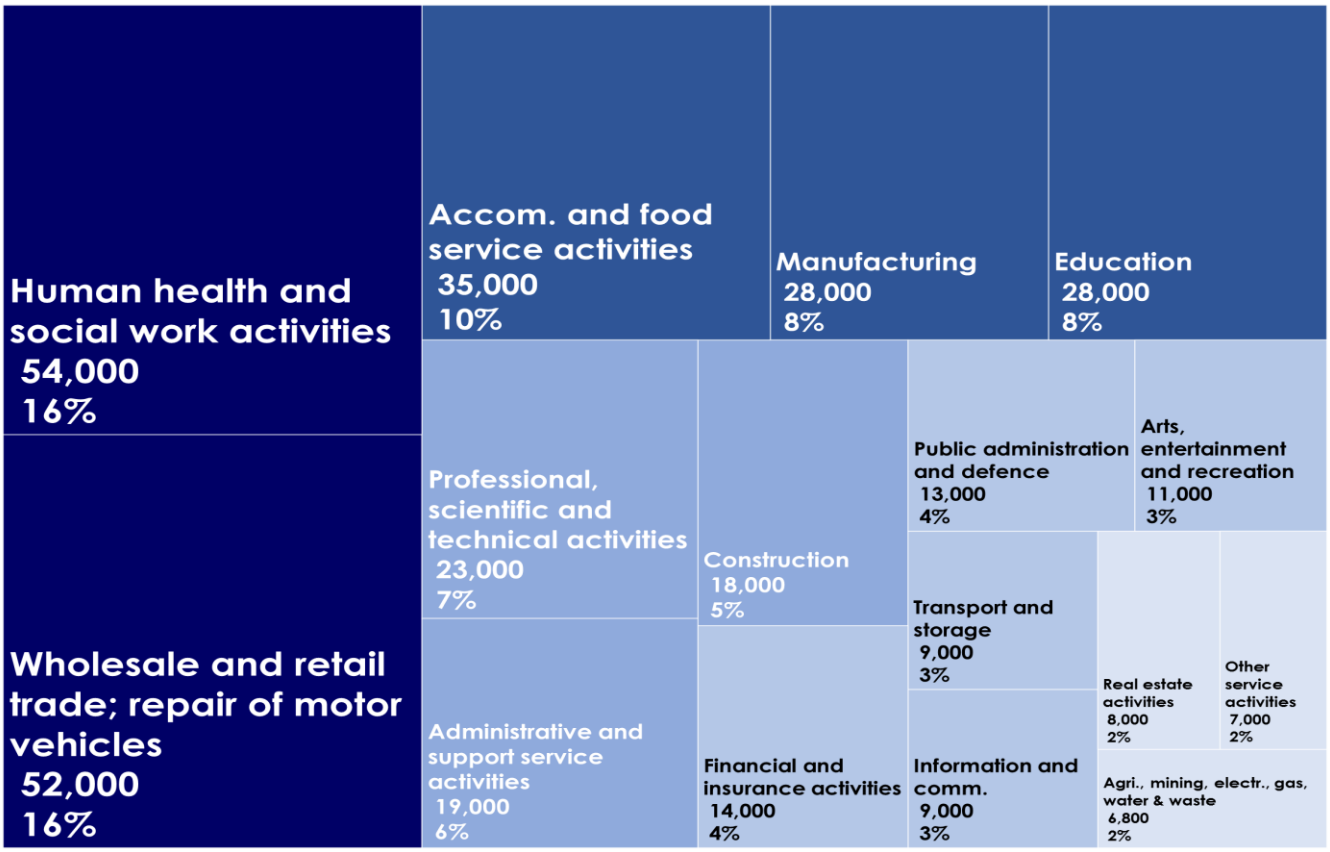


Figure 25. Dorset LEP Employment numbers by industry 2018. ONS Business Register and Employment Survey 2018

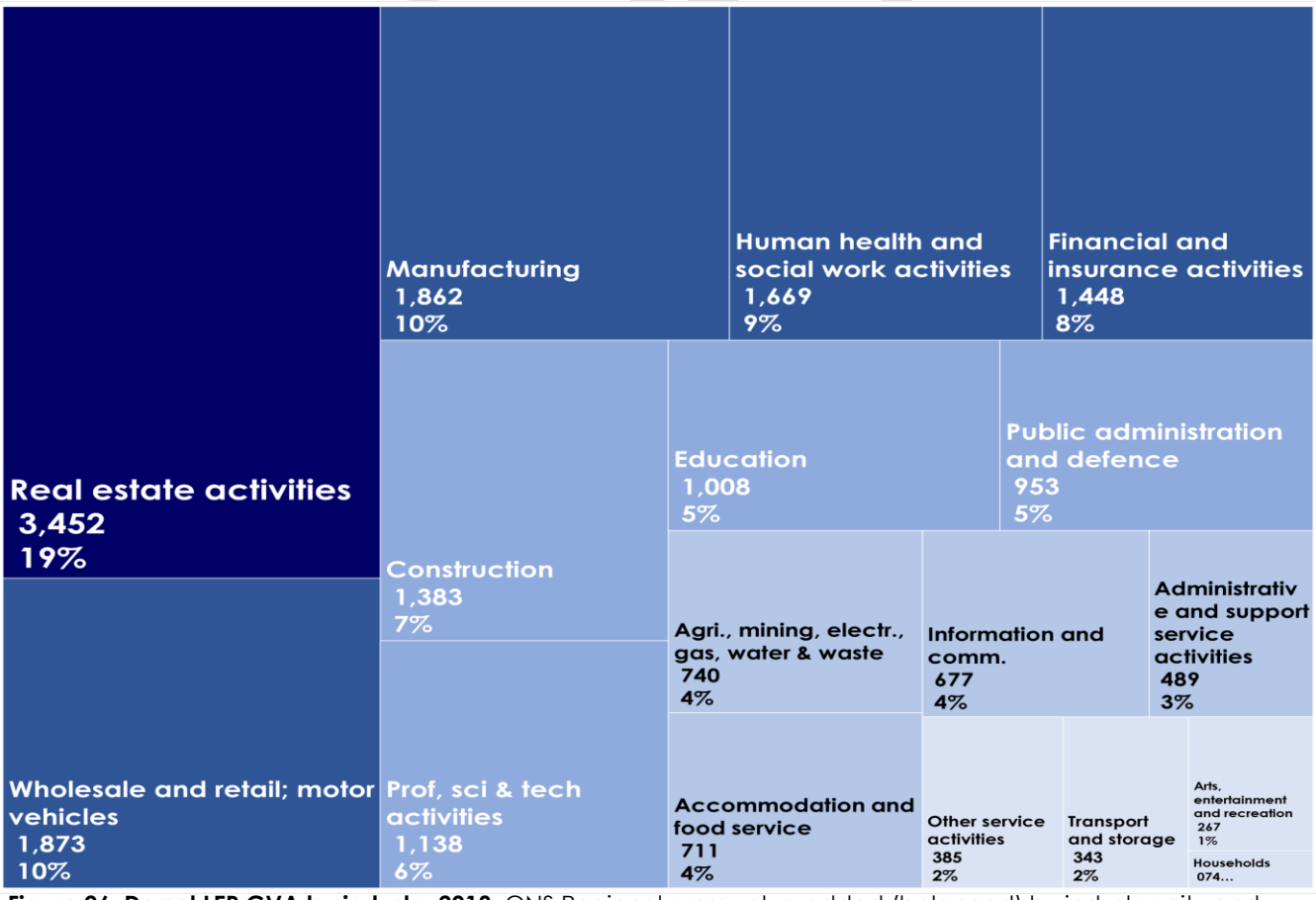


Figure 26. Dorset LEP GVA by industry 2018. ONS Regional gross value added (balanced) by industry: city and enterprise regions

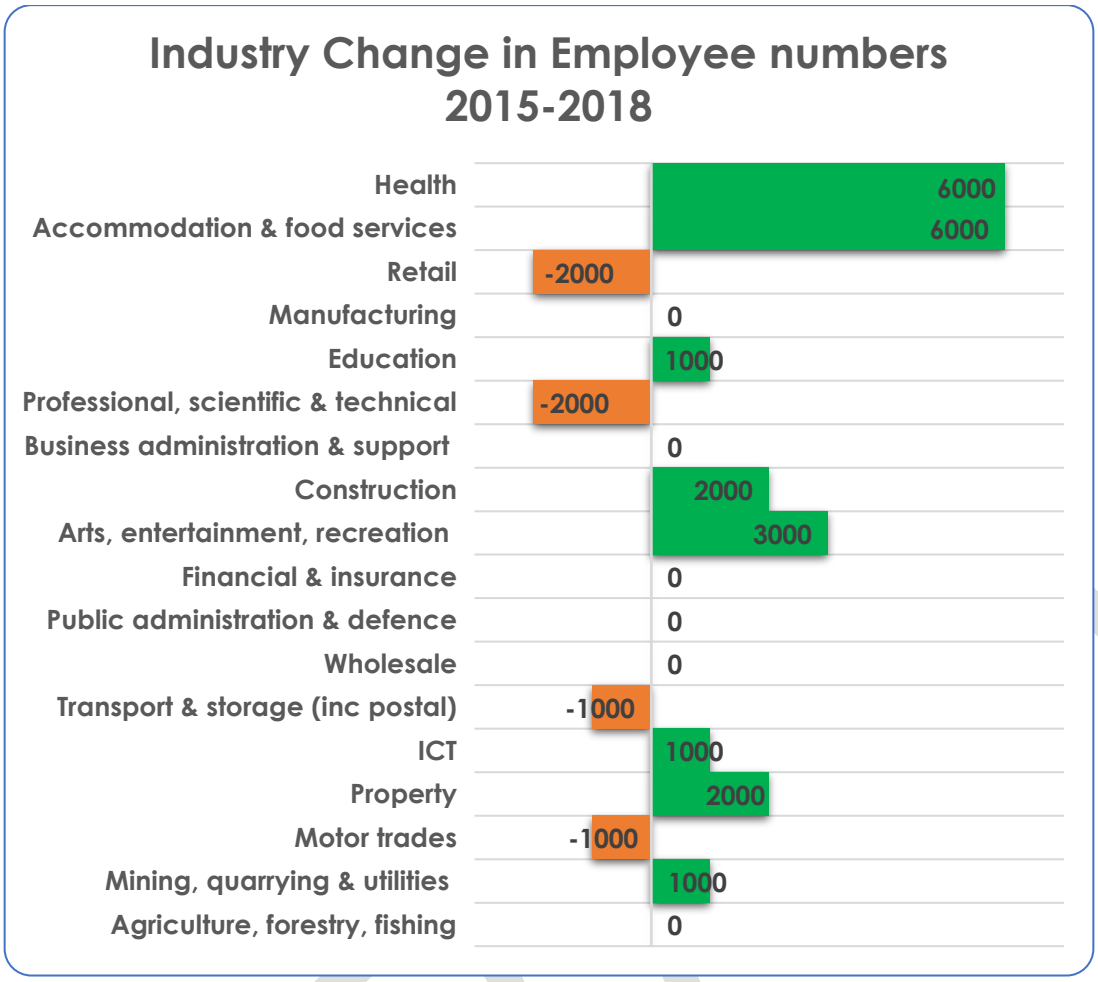


Figure 27. Dorset LEP industries (SIC) change in number of employees 2015-2018. Business Register and Employment Survey Open Access

Vacancies by Industry: Labour Market Intelligence

In order to gauge both expansion and replacement demand, we look at labour market intelligence to understand the scale and types of jobs advertised within Dorset LEP. We focus on the data from the past year (January-December 2019). The source we use is Labour Insight by Burning Glass Technologies[19], accessed under a licence funded by Dorset LEP.

Around 62,600 jobs were advertised within the area over 2019. At a basic level, based on this source, there could be signs that recruitment demand from local organisations has dampened over the past year. The number of advertised jobs has been lower in 2019 than in previous years – possibly highlighting a slowdown in the jobs market. In 2018, c79,800 jobs were advertised and c78,500 in 2017. However, we would wish to analyse the data for a longer period to understand the true developments in the jobs market.
The breakdown of vacancies advertised per industry is shown in Figure 28 for Dorset LEP and in Figure 29 for the UK. The Dorset LEP industries demand broadly reflects the wider UK picture, with the exception of health and social care, where the proportions are higher for Dorset than those seen nationally.

[19] Labor Insight – Burning Glass Technologies

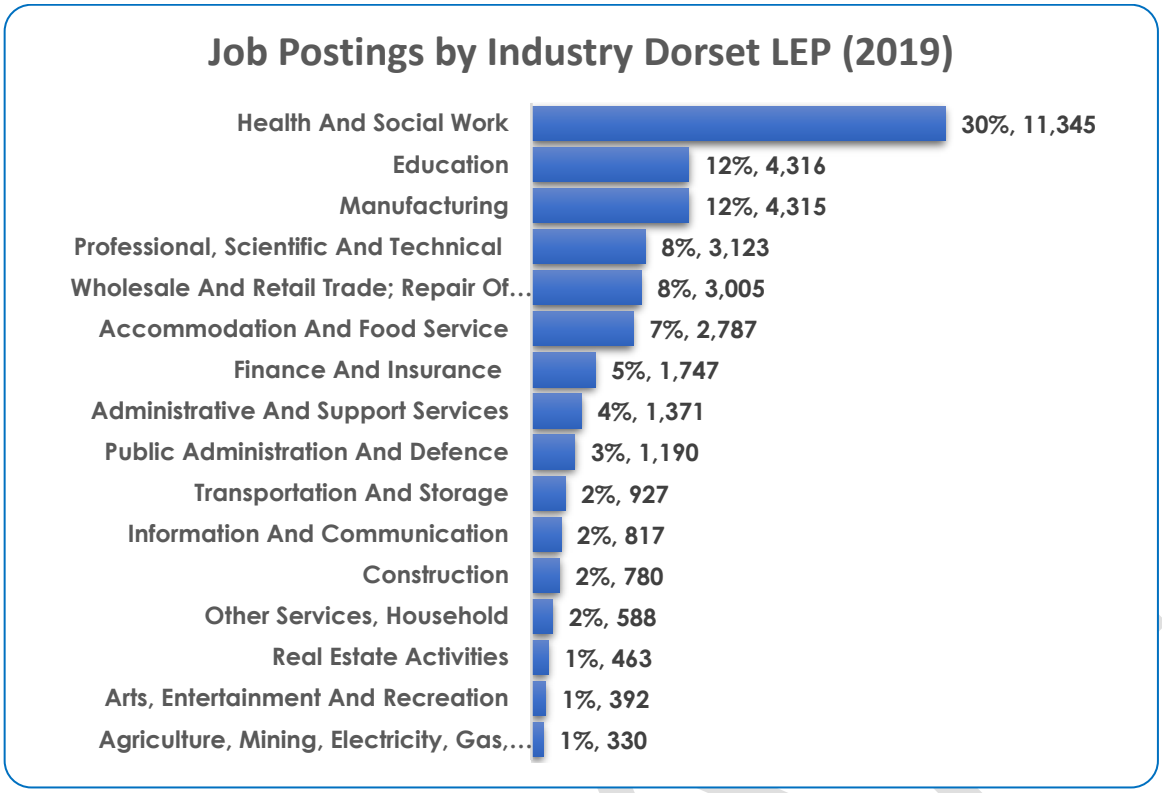


Figure 28. Job Postings by Industry Dorset LEP, 2019 – Burning Glass Technologies. There are 62,646 postings available of which 25,150 are unspecified in terms of industry and excluded.

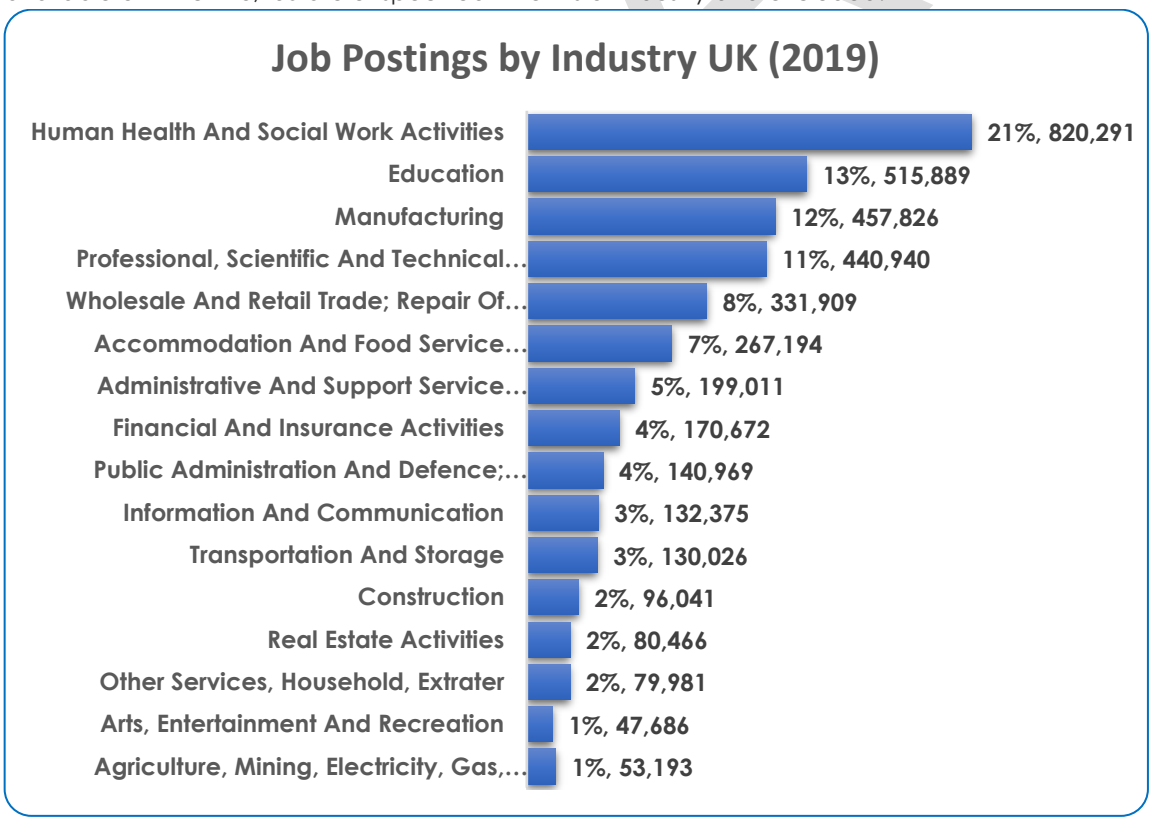


Figure 29. Job Postings by Industry UK, 2019 – Burning Glass Technologies. 43% of records have been excluded as do not include industry. As a result, the chart may not be representative of the full sample.

Key Trends and Drivers of Future Industry Demand

To further explore the expected demand, we look into the future industry development projections grounded on current literature and the latest Working Futures 2017-2027 report[20], including forecasts based on the macroeconomic and labour market context and assuming past patterns of behaviour and performance will continue in the future.

Over the longer-term, it seems likely that the structural trends outlined here will resume, however, the rate of growth and decline may be different from that projected before Covid-19.

Future projections are highly uncertain in the current climate with key challenges outlined below.

Table 10. Key challenges affecting the broader industry sectors

Industry	Higher COVID-19 impact	Brexit	Skill shortages	Technology Automation
Non-marketed services		☒	☒	
Trades, Accommodation	☒	☒		☒
Business, Other Services			☒	☒
Manufacturing, Construction Primary	☒	☒	☒	☒

Key trends:

Technology & Automation

- High-speed mobile internet, adoption of big data and cloud technology, combined with breakthroughs in robotics, machine learning, and AI are set to enhance productivity, resulting in between 30% and 50% of British jobs potentially automated by 2030[21] and giving rise to entirely new occupations[22]. Low-medium skilled and repetitive work has higher automation potential that could cause further middle-class squeeze and is likely to disproportionately affect women[23]. Even tasks deemed essentially human – communicating, managing, advising, reasoning and decision-making could be partly automated (~30%)[24].

Globalisation, Political & Demographic Changes

- Globalised labour markets benefit advanced technologically and knowledge intensive services but could lead to displacing lower-skilled work and raise protectionism. Political uncertainty predominantly affects defence, finance, construction, engineering, and healthcare sectors - already under demographic pressures of ageing population, urbanisation and environmental challenges[25].

[20] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020
[21] PwC, 2018. Will robots really steal our jobs? An international analysis of the potential long-term impact of automation. London
[22] World Economic Forum, The Future of Jobs Report 2018
[23] Hays and Oxford Economics, 2019, The Global Skills Dilemma: How can supply keep up with demand? The Hays Global Skills index 2019
[24] World Economic Forum, The Future of Jobs Report 2018
[25] Bakhshi, H., Downing, J., Osborne, M., Schneider, P. (2017). The Future of Skills: Employment in 2030. London: Pearson and Nesta.

Changing Employment and Learning Patterns

- Longer work lives, shorter job cycles, emerging jobs, remote and gig work, and diminishing expertise shelf life call for creative lifelong re-and up-skilling solutions to counteract "time-lag" between emerging skills needs and educational response[26].

Industry Developments

- The following chart shows the sectors that are projected to see growth in both output and employment in the top-right quadrant. The size of the bubbles reflects the percentage of the workforce employed in the sector (in the UK in 2027).

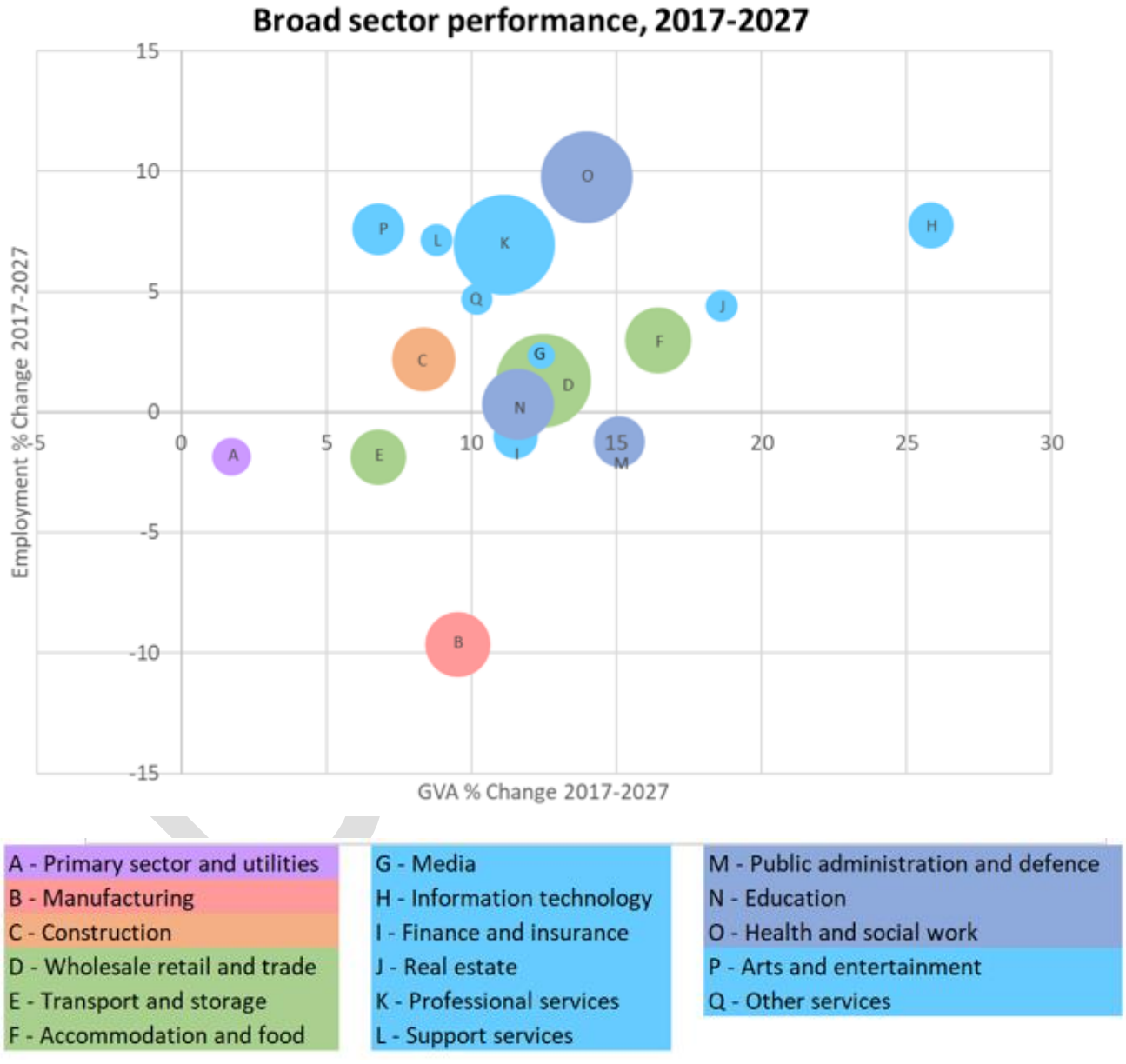


Figure 30. Broad sector performance 2017-2027 – reproduced from Working Futures 2017-2027, DfE 2020

[26] Universities UK, 2018, Solving Future Skills Challenges, London

The potential of automation in sectors using current technology is visually illustrated in the next chart.

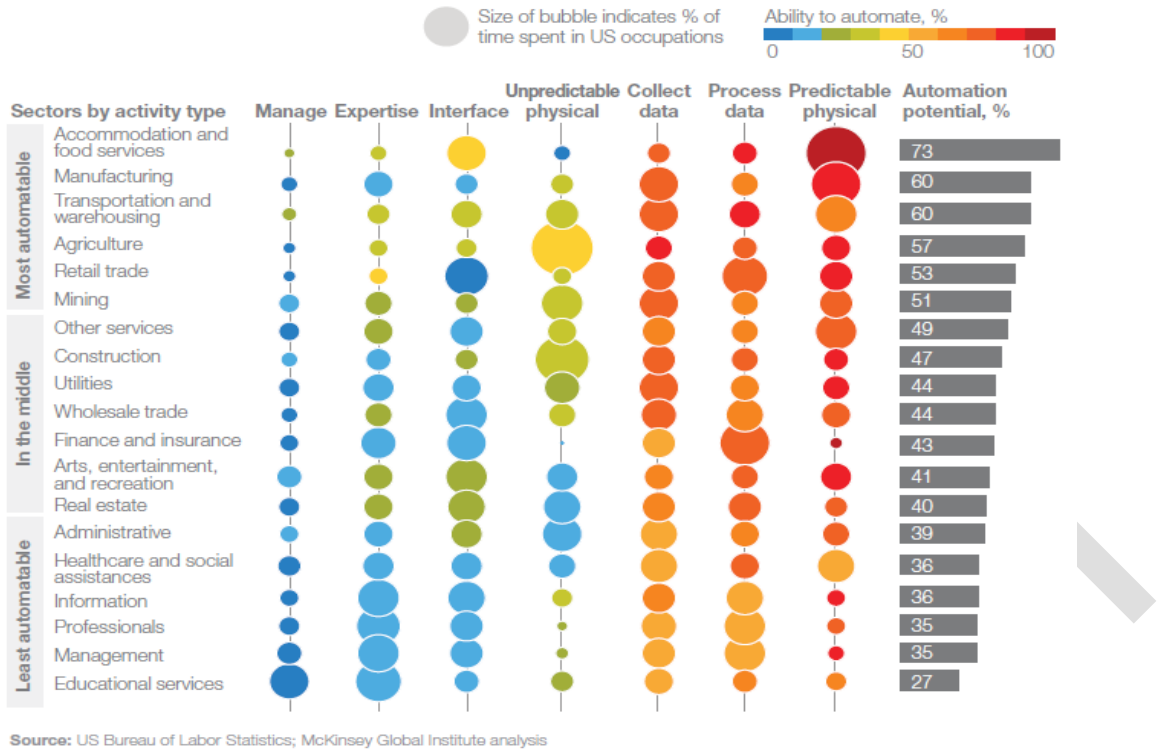


Figure 31. Potential of automation of a range of job sectors in the US economy using current technology. Sectors are broken down into categories of work activity, and the ability to automate is indicated for each category. Reproduced from "What's now and next in analytics, AI, and automation", 2017, McKinsey

Output projections per industry level in the UK over the next years are shown in the figure below while employment projections for Dorset's industries are illustrated in Figure 33.

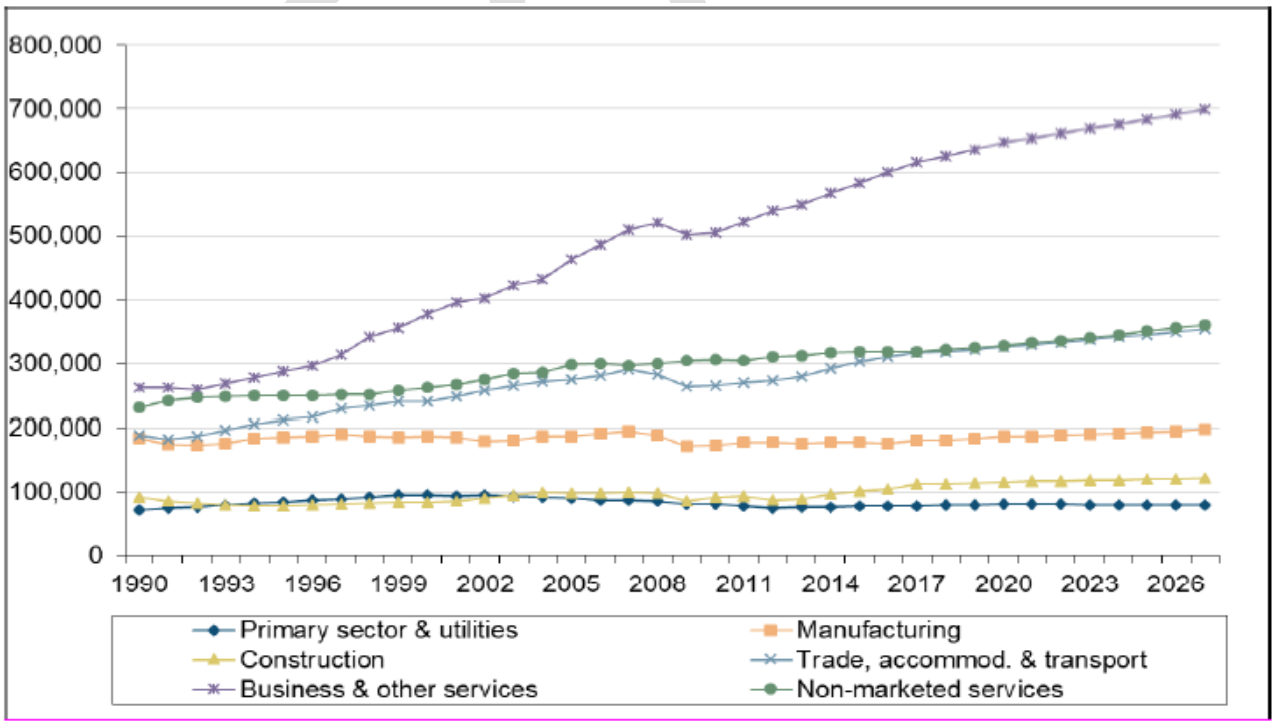


Figure 32. UK Output profiles by broad sector, 1990-2027 (£ millions). Reproduced from Working Futures 2017-2027. Cambridge Econometrics, 2020

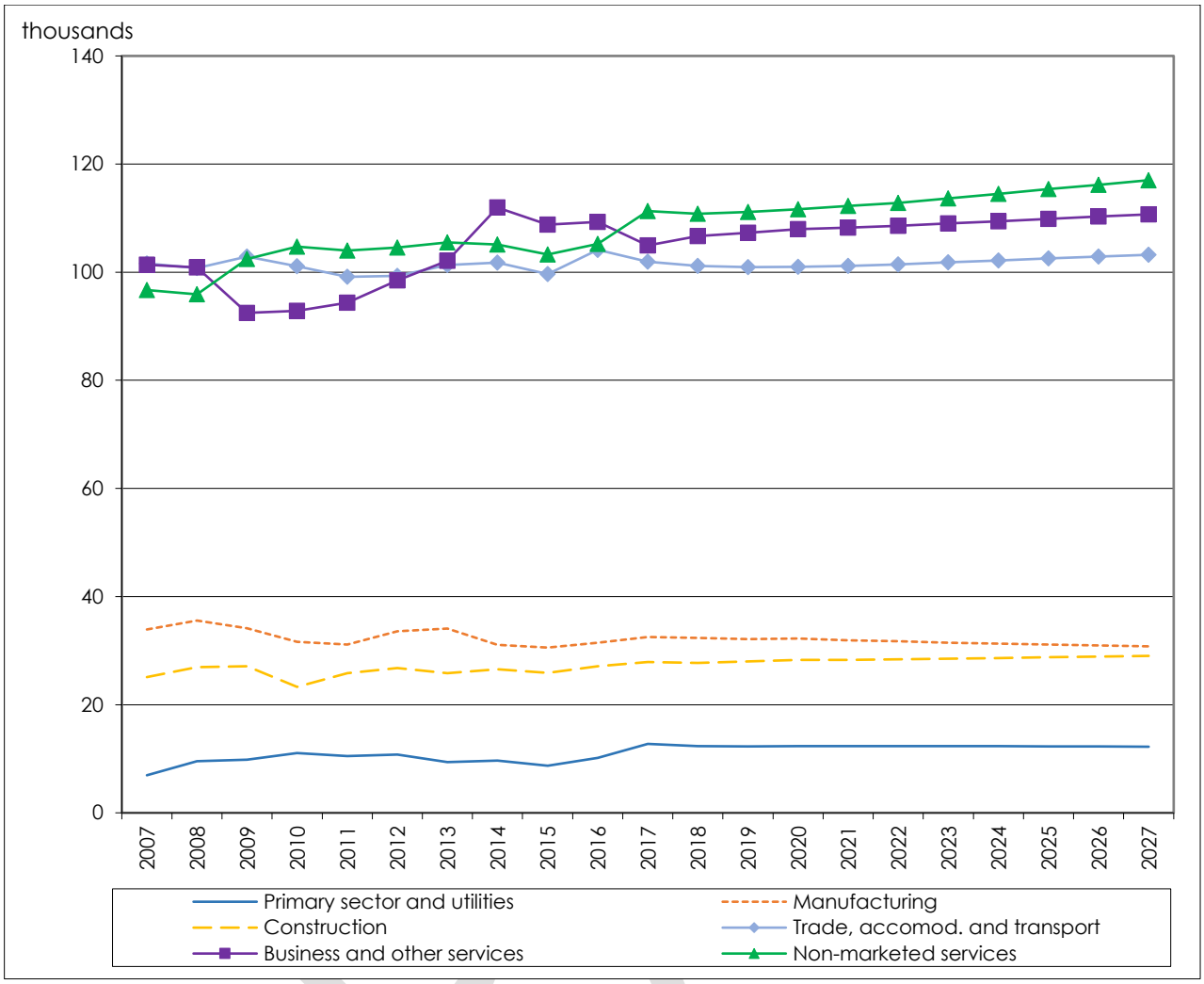


Figure 33. Employment by Industry (SIC 2007), Dorset, Working Futures 2007-2027, Cambridge Econometrics, 2020

According to the latest Working Futures study, the industries in Dorset will largely maintain their employment levels over the following years (the study covers the period between 2017 and 2027 and was published prior to coronavirus developments). The future projections for employment levels across sectors show that **where decline is expected, it is marginal** over a 10-year period (as detailed in

Table **11** and illustrated in Figure 34 below). **Conversely, healthcare and some areas of professional services are projected to see larger growth in employment.**

Figure 34. Employment developments based on Working Futures projections for Dorset. Numbers represent thousands. Working Futures 2017-27. Cambridge Econometrics, 2020

Table 11. Employment by Industry Group and Sector (SIC 2007), 2017-2027, Dorset. Working Futures 2017-2027. Cambridge Econometrics. *Estimate unreliable sample size is small

Absolute levels and changes (000s)

	Levels	Change
Engineering	**2027**	**2017-2027**
Primary sector and utilities	**12**	**-1**
Agriculture	8	-1
Mining and quarrying	*	*
Electricity and gas	*	*
Water and sewerage	3	0
Manufacturing	**31**	**-2**
Food drink and tobacco	4	0
Engineering	6	-1
Rest of manufacturing	21	-1
Construction	**29**	**1**
Trade, accomod. and transport	**103**	**1**
Wholesale and retail trade	59	1
Transport and storage	9	0
Accommodation and food	35	1
Business and other services	**111**	**6**
Media	2	0
Information technology	11	1
Finance and insurance	15	0
Real estate	8	0
Professional services	28	2
Support services	25	2
Arts and entertainment	12	1
Other services	10	0
Non-marketed services	**117**	**6**
Public admin. and defence	17	-1
Education	35	0
Health and social work	65	7
All industries	**403**	**12**

The projected occupational structure within industries is presented in Figure 35, illustrating that across all industries **growth in levels of employment is mainly concentrated in *professional occupations*,** seen to a different extent across all industries. The most notable increase is seen in non-marketed services (mainly in healthcare and education) and business where there is a projected need for c5,000 and c. 3000 more professionals respectively over the studied period (2017-27).

thousands	Non-marketed services				Manufacturing				Trades, Accom. Transport			
Occupations	**2017**	**%**	**2027**	**%**	**2017**	**%**	**2027**	**%**	**2017**	**%**	**2027**	**%**
Managers, directors and senior officials	5	5%	6	5%	4	12%	4	14%	16	15%	17	15%
Professional occupations	41	37%	46	39%	4	13%	5	15%	5	5%	6	5%
Associate professional and technical	15	14%	16	14%	4	13%	4	14%	7	6%	8	7%
Administrative and secretarial	11	10%	7	6%	3	9%	3	8%	8	7%	8	7%
Skilled trades occupations	1	1%	1	1%	8	25%	7	23%	11	10%	9	8%
Caring, leisure and other service	31	27%	36	30%	~		~		2	2%	3	2%
Sales and customer service	1	1%	1	1%	1	4%	1	4%	26	23%	25	22%
Process, plant and machine operatives	1	1%	1	1%	5	17%	4	14%	7	6%	6	5%
Elementary occupations	4	4%	3	3%	2	6%	2	6%	20	18%	20	17%

	Construction				Business and other services				Primary sector and utilities			
	2017	**%**	**2027**	**%**	**2017**	**%**	**2027**	**%**	**2017**	**%**	**2027**	**%**
Managers, directors and senior officials	3	10%	3	11%	15	14%	17	15%	1	7%	1	8%
Professional occupations	3	10%	3	12%	21	20%	24	22%	1	5%	1	7%
Associate professional and technical	2	7%	2	8%	22	21%	24	22%	1	7%	1	7%
Administrative and secretarial	2	7%	2	5%	15	15%	13	11%	1	6%	1	6%
Skilled trades occupations	14	50%	14	48%	5	5%	5	4%	4	31%	3	28%
Caring, leisure and other service	~		~		8	8%	9	8%	1	6%	1	7%
Sales and customer service	1	2%	1	2%	6	5%	6	5%	1	4%	1	4%
Process, plant and machine operatives	2	9%	2	8%	2	2%	3	2%	2	14%	1	12%
Elementary occupations	2	5%	1	5%	11	10%	11	10%	3	20%	3	21%

Figure 35. Dorset industry occupation composition 2017 vs 2027. Working futures 2017-2027, Local worksheets. Cambridge Econometrics, 2020.
~ Estimate is less than 500

Reflections on Industry Demand

This section combines the labour market intelligence as an important barometer of the types of jobs that local businesses are looking for with future projections in order to understand the expected near-to-mid-term skills and labour demand at industry level in Dorset.

Non-marketed Services: Health, Education, Public Administration and Defence

Together, healthcare, education, public administration and defence accounted for 29% of the employment in Dorset in 2018 (95,000 people, Figure 25) already exceeding the nationally predicted proportions for 2027 (26%), the difference largely accounted for by employment in healthcare. The sectors contributed £3,6bn to the local economy in 2018 – representing one fifth of the GVA (19.6%), which also exceeds the current and predicted proportions nationally (Table 12).

Nationally and regionally, the outputs and services in these sectors are largely dependent on policies, political decisions, and the continued pressures on public finances.[27] They are expected to see some of the strongest growth in both employment and GVA, by rates higher than the economy-wide average, again largely due to the increased demand in the healthcare sector.

Table 12. Public admin. health & education - ONS BRES 2018 and Working Futures 2027

Public admin. health & education	Dorset LEP 2018	UK 2017	UK 2027
Total employment (000s)	95	8,793	9,212
Share of total employment (%)	28.6	25.1	25.6
GVA: (£)	3,630	317,601	360,438
Share of GVA (%)	19.6	17.7	18.0

Healthcare

In Dorset, healthcare is the largest (54,000,16%) employment sector and has seen a spike in employment over recent years (6,000 more employed since 2015) and these trends are set to continue.

The sector is projected to see the highest growth in employment over the coming years (Figure 30) and this trend will be even more pronounced in Dorset (growth of 7,000 more to be employed between 2017 and 2027 – see Table 11) largely linked to ageing demographic.

Almost half of the sector workforce (45%) is made up of professional and associate professional occupations and over a third (37%) of care occupations. These are also the areas where the growth in employment is projected with some decline in administrative occupations likely.

As these reflections suggest, the demand in healthcare is likely already exceeding supply, which may drive further innovation in delivery.

The 2019 healthcare labour demand dashboard is shown in Figure 36 and illustrates the key occupations, skills and qualification levels required over the past year. The number of vacancies in Healthcare over recent years varied between 11,000 and 12,000 p.a. accounting for c.30% of all advertised vacancies in Dorset (Figure 28).

[27] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Education

Education employs 28,000 people (8%) in the region and has seen a variability in employment levels over the past years.

According to projections[29], the levels of employment in the sector will be maintained over the coming years, which aligns with the focus on lifelong learning and education.

Over half of the sector workforce (53%) is made up of professional occupations, which are likely to grow in demand, although employment growth in the sector might be limited by reported shortages of teachers nationally.[28]

Some decline in administrative occupations is likely.

The education labour demand dashboard is shown in Figure 37. There were 4,316 vacancies advertised over 2019 accounting for c.12% of all advertised vacancies in Dorset LEP (Figure 28) and numbers over recent years varied between 3,600 and 4,800 p.a.

Public Administration and Defence

Public administration and defence employs 13,000 people (4%) in the region and has maintained its employment levels throughout the past years.

The levels of employment in the sector may decline slightly over the next years (Table 11) – decline mainly projected in administrative roles and possibly connected to ongoing effort to decrease public spending[29]. This is particularly relevant to the local authorities in Dorset LEP who are the key recruiters in the sector and have experienced significant reorganisation in line with the unitarisation of Dorset's nine councils and their replacement with two new ones.

This perhaps explains decrease in the number of vacancies advertised over recent years from over 1,600 in 2016 to 1,190 in 2019. However, recent analysis indicates that demand has picked up over recent months since the coronavirus outbreak.

The public administration and defence labour demand dashboard is shown in Figure 38.

Automation

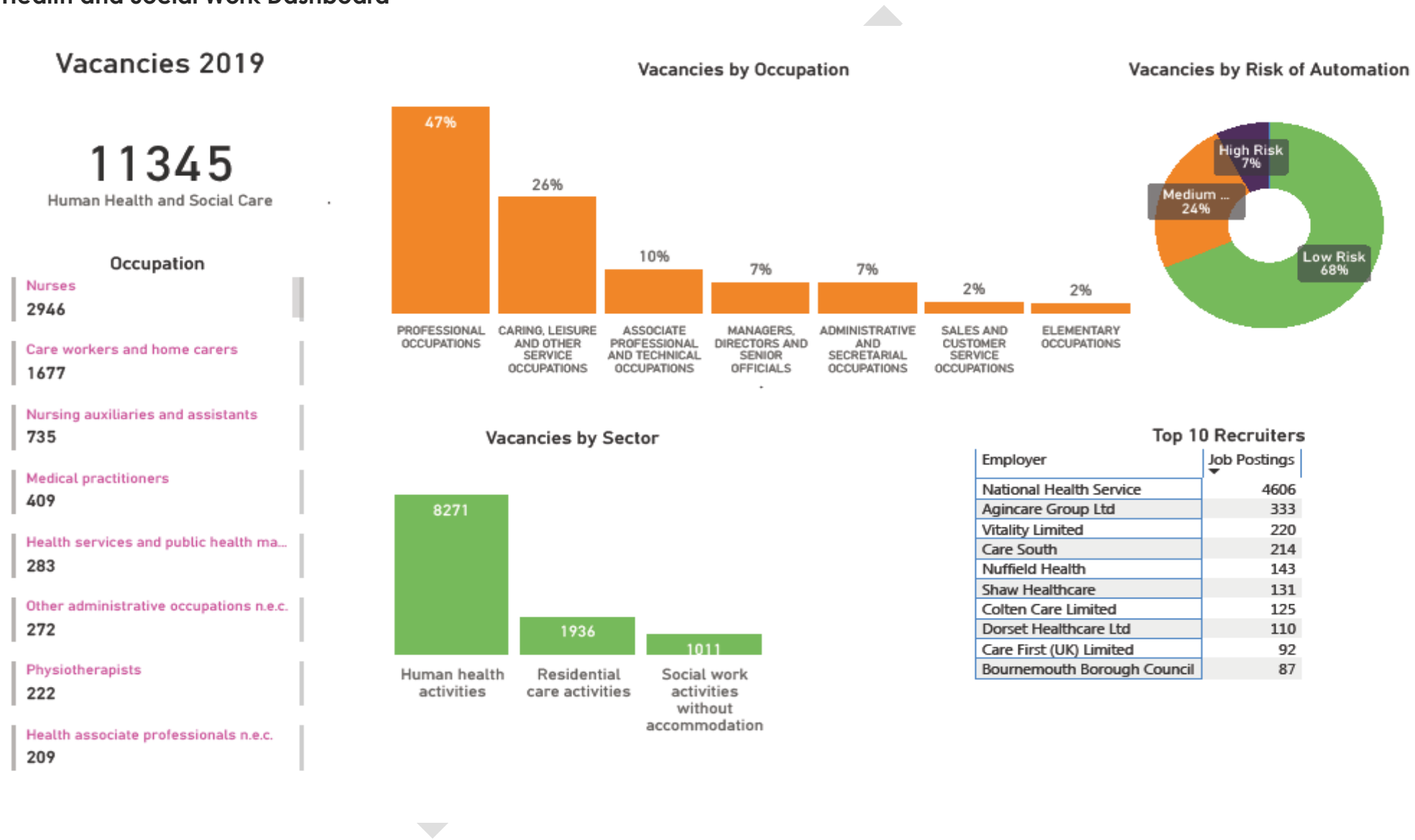
While as shown in the following dashboards, Healthcare and Education sectors are characterised by lower potential for automation particularly in occupations of high demand, such as nursing and teaching, there are opportunities for productivity enhancements in some areas of residential care, administrative and secretarial occupations, skilled trade occupations, and process, plant and machine operatives.

As currently the majority of in-demand occupations are requiring bachelor's degrees (e.g. nursing and teaching), significant employment growth is expected for higher-level occupations, also including managers, most professional occupations and many associate professional and technical roles in these sectors.

[28] Teacher recruitment and retention in England, House of Commons Library: https://researchbriefings.files.parliament.uk/documents/CBP-7222/CBP-7222.pdf; The Education Policy Institute: https://epi.org.uk/publications-and-research/the-teacher-labour-market-in-england

[29] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Health and Social Work Dashboard



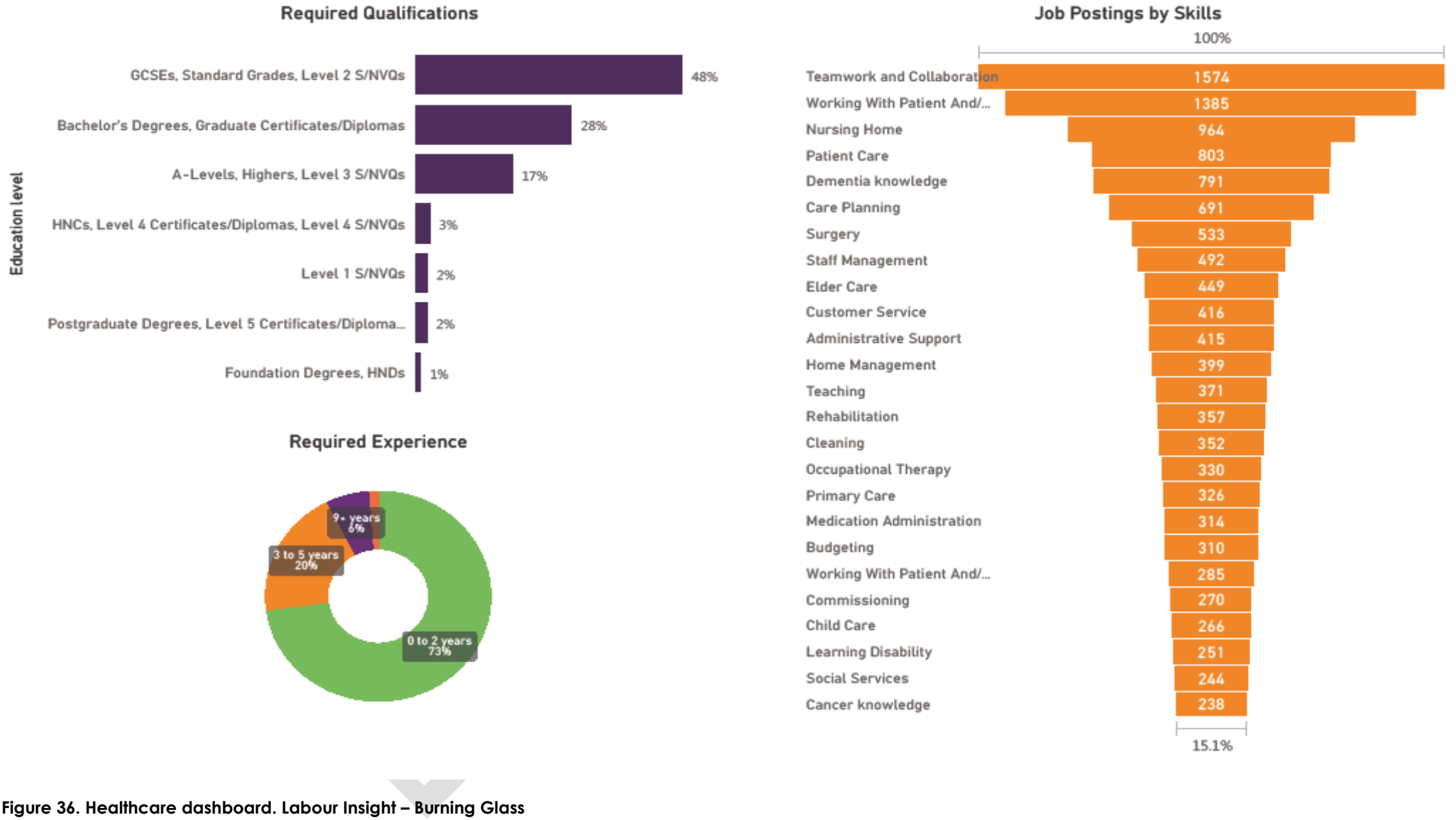


Figure 36. Healthcare dashboard. Labour Insight – Burning Glass

Education Dashboard

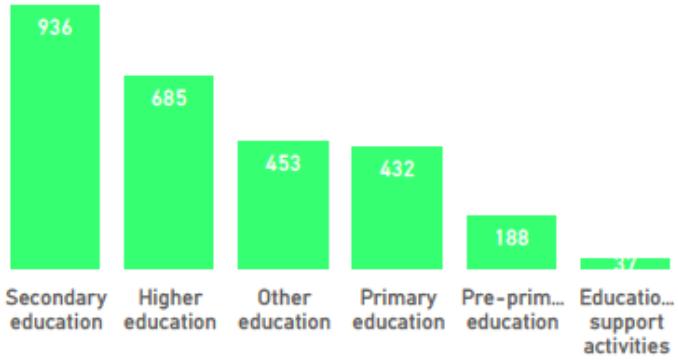
4316

Vacancies Education 2019

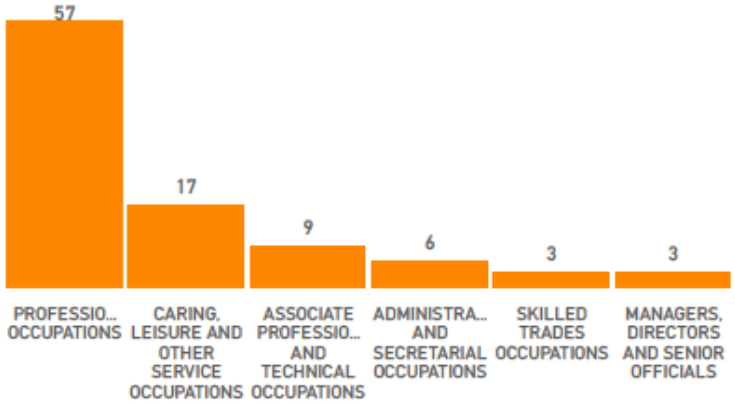
Occupation

- Teaching assistants 765
- Teaching & other edu prof 658
- Secondary education teaching prof 632
- Primary & nursery edu teaching pr... 400
- Higher education teaching professi... 193
- Nursery nurses and assistants 139
- Other admin occupations 113
- Special needs edu teaching prof 76

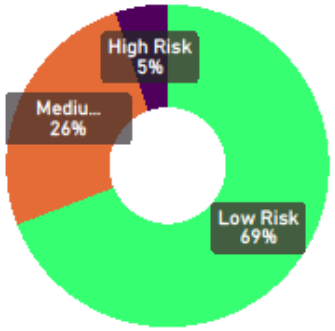
Vacancies by Sector



Vacancies by Occupation (%)



Vacancies - Risk of Automation



Top 10 Recruiters

Employer	#Vacancies
BOURNEMOUTH UNIVERSITY	489
SPIRES LIMITED	137
BOURNEMOUTH AND POOLE COLLEGE	132
BOURNEMOUTH BOROUGH COUNCIL	97
ARTS UNIVERSITY BOURNEMOUTH	57
BRYANSTON SCHOOL	44
TOPS DAY NURSERIES LIMITED	40
AMBITIONS ACADEMIES TRUST	38
PRO EDUCATION	36
SUPERPROF	34

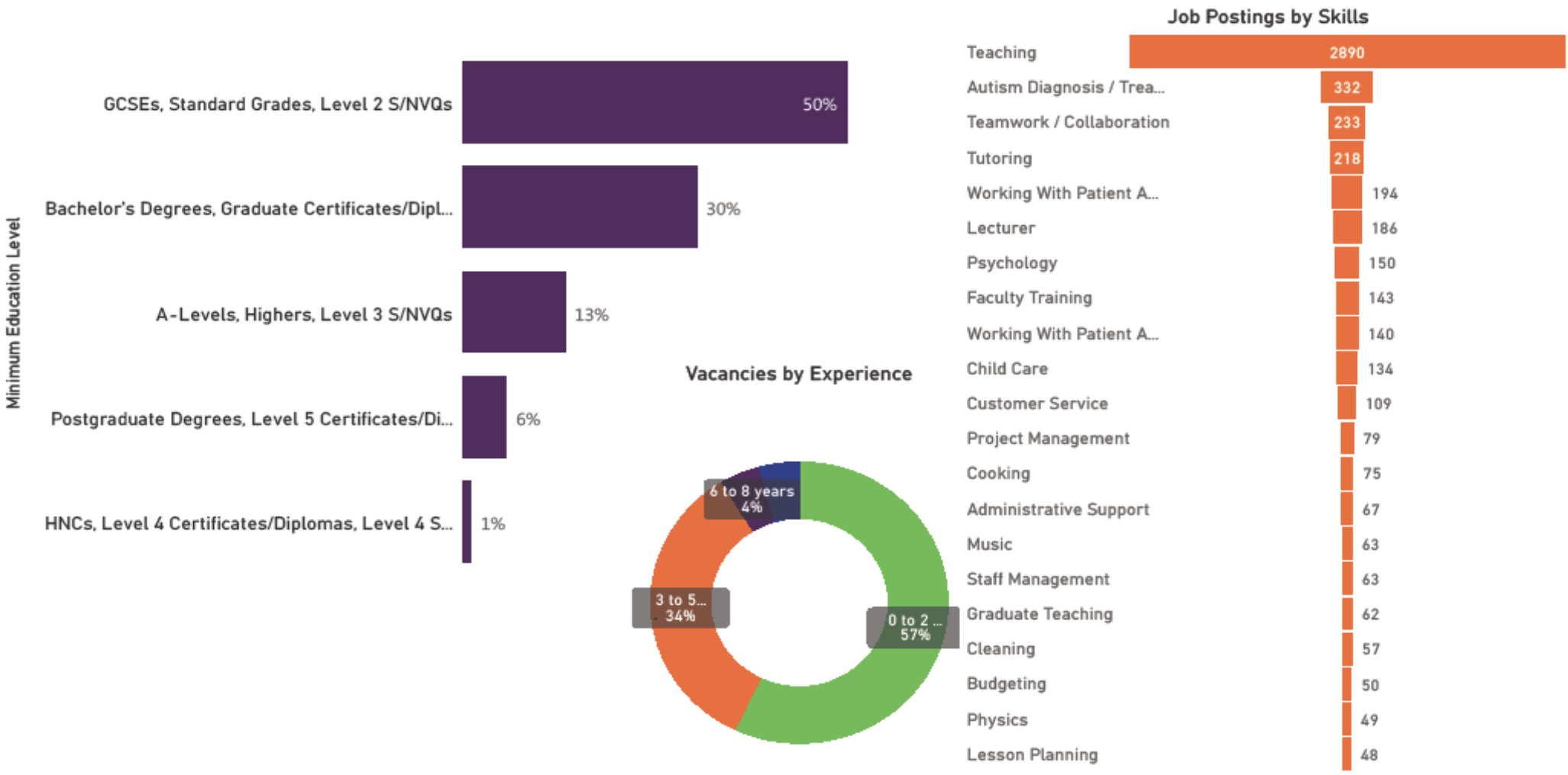


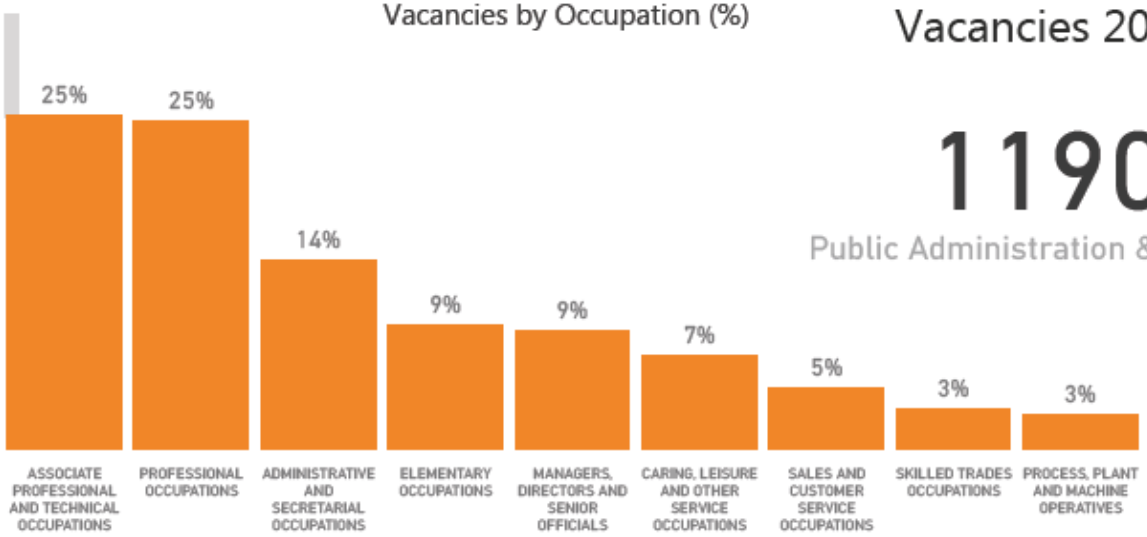
Figure 37. Education dashboard. Labour Insight – Burning Glass

Public Administration and Defence Dashboard

Occupation

- Other administrative occupations n.e.c. 58
- Security guards and related occupations 44
- Managers and proprietors in other services n.e.c. 43
- Care workers and home carers 38
- Social workers 28
- IT business analysts, architects and systems designers 27
- Youth and community workers 25
- Programmers and software development professionals 22
- Health and safety officers 21
- Engineering technicians 20

Vacancies by Occupation (%)



Vacancies 2019

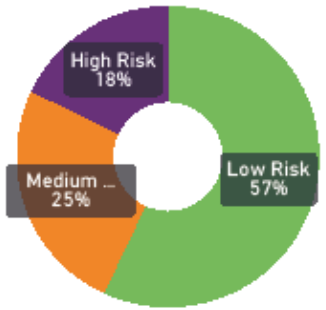
1190

Public Administration & Defence

Top 10 Recruiters

Employer	Job Postings
Bournemouth Borough Council	348
Cobham	188
Borough Of Poole	63
Dorset County Council	59
Dorset Police	29
Borough Of Poole Council	26
Environment Agency	23
Hampshire County Council	22
Ministry Of Justice	20
Ministry Of Defence	18

Number of Job Postings by Risk of Automation



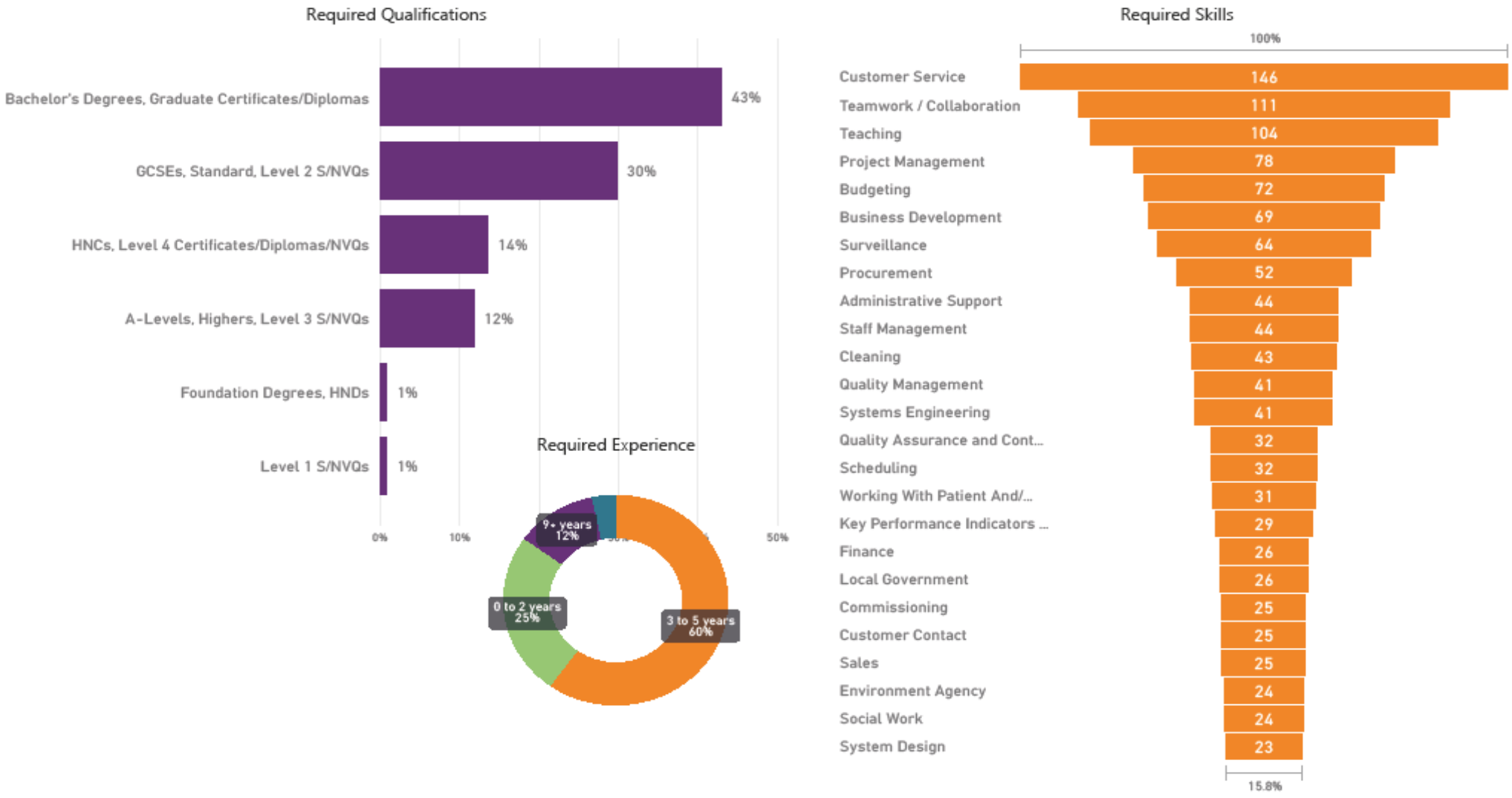


Figure 38. Public Administration and Defence dashboard. Labour Insight – Burning Glass

Manufacturing

The Working Futures projections expect a marginal decrease in overall manufacturing employment over the next years (Table 11, Table 13). However, this may conceal differing trends at 'sub-sector' level. For example, employment growth is expected in more **advanced manufacturing** and UK specialism areas, e.g. **aerospace, pharmaceuticals and other technology-intensive industries (such as automotive manufacturing).** Processes and techniques such as 3D printing, additive and composite manufacturing and plastic electronics are changing the shape of production within the sector.

There is a well-established and developing Advanced Manufacturing and Engineering space in the Dorset LEP area with major companies operating locally such as BAE Systems, Cobham, Honeywell, Holt Engineering, Curtis-Wright, Magellan Aerospace and many more supported by the Dorset Engineering & Manufacturing Cluster .

Table 13. Manufacturing - ONS BRES 2018 and Working Futures 2017- 2027

Manufacturing	Dorset LEP 2018	UK 2017	UK 2027
Total employment (000s)	28	2,672	2,414
Share of total employment (%)	8.4	7.6	6.7
GVA: (£)	1,862	179,756	198,895
Share of GVA (%)	10.1	10.0	9.8

There were c.28,000 employed in the manufacturing sector in Dorset in 2018, with over 40% of the workforce engaged in skilled trades and process, plant and machine operations and 38% in managerial, professional and associate professional roles.

The sector contributes £1.9 bn (10%) to the local economy.
As seen in the manufacturing labour demand dashboard (**Figure 39**), there were over 4,300 vacancies advertised in the sector throughout 2019 with numbers per annum varying between 4,100 and 5,200 over the past few years. A quarter of all vacancies advertised (n=1,015) were professional occupations which is an area of increased demand within the sector, including engineers, programme and software developers, analysts and quality professionals requiring higher qualifications.

Manufacturing is likely to experience further productivity enhancements in the future with repetitive operations and certain occupations related to trades, quality assurance and sales being augmented or automated, which may be related to decreased employment levels projections while economic outputs are expected to be largely maintained (again, as projected before coronavirus outbreak).
The availability of skilled labour will be an important consideration for the economic outlook in the long-term. Replacement demand is also a concern for many manufacturers where there is predominantly older workforce. Alongside this, the fast-changing technological landscape means that the need to update skills of the existing workforce tend to be quite marked within the industry and are critical to enable the sector to continue to prosper and innovate [30].

[30] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Vacancies

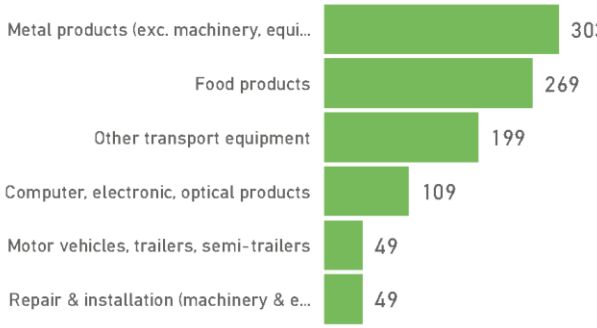
4315

Vacancies Manufacturing 2019

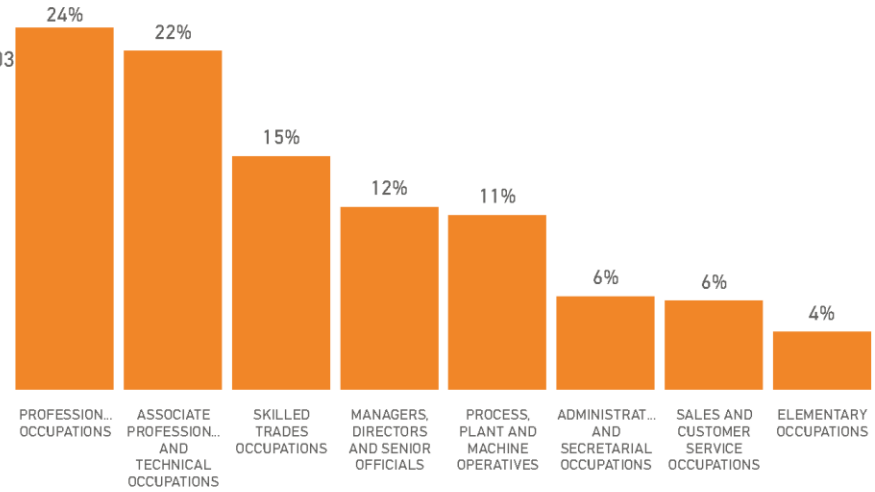
Occupation

- Metal working machine operatives — 287
- Engineering technicians — 249
- Welding trades — 185
- Production managers and directors in... — 168
- Metal machining setters and setter-o... — 158
- Quality assurance technicians — 136
- Programmers and software developm... — 132
- Sales related occupations n.e.c. — 130
- Quality control and planning engineers — 116

Vacancies by Sector



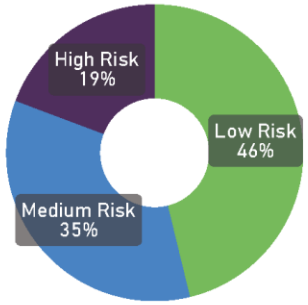
Vacancies by Occupation (%)



Top 10 Recruiters

Employer	Vacancies
Bae Systems	119
Holt Engineering Limited	45
Manufacturing/Surveying	32
Greggs Plc	29
Magellan Aerospace	25
Nucleus Precision Consultants	25
Rise Teconrad Consulting Ltdhniconrad Consulting	22
Team Incorporated Limited	22
Curtiss Wright Corporation	16
Micro Nav	16

Number of Vacancies by Risk of Automation



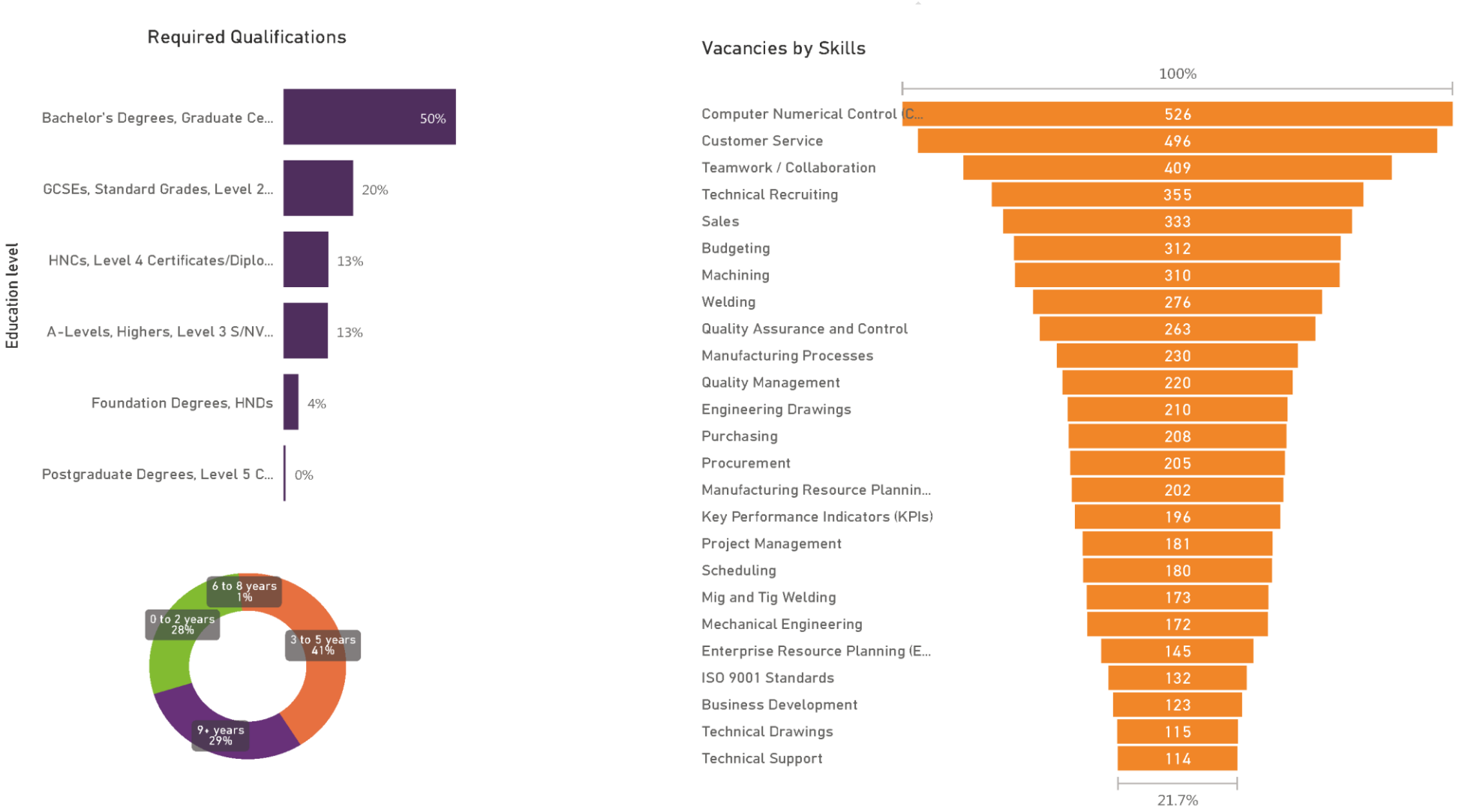


Figure 39. Manufacturing dashboard. Labour Insight – Burning Glass

Wholesale & Retail Trades, Accommodation & Food and Transport

Trades (52,000,16%) and accommodation and food (35,000, 11%) are the second and third largest employment sectors in Dorset LEP area and joined with transport (9,000, 3%) account for almost 30 percent of all employment. They are significant for the local economy with an overall GVA share of 16% in 2018 with the differences to the UK contribution shown in Table 14 largely due to lower performing transport sector.

Table 14. Trades, Accommodation, Transport - ONS BRES 2018 and Working Futures 2017- 2027

Trades, Accommodation, Transport	Dorset LEP 2018	UK 2017	UK 2027
Total employment (000s)	96	9,218	9,323
Share of total employment (%)	28.9	26.3	25.9
GVA: (£)	2,927	316,266	353,476
Share of GVA (%)	15.8	17.7	17.6

The marginal employment growth projections seen in Table 11 and Figure 33 made by the Working Futures 2027 study were based mainly in jobs growth in accommodation and catering, while the strongest output growth was expected in accommodation and air transport. Unfortunately, these areas have been amongst the worst affected by the outbreak and in the current uncertain climate near term job projections seem bleak. The cash position of many businesses means many will struggle to survive a long-term shutdown and the main effort in the near term will be in protecting employment. There are particular concerns for accommodation and food services where the biggest concentration of elementary occupations (over a third of all employed, 38%) and low wages are observed and possible unemployment is likely to cause wide spread societal impact and further disadvantage in he long term. The capacity of the sector is expected to be reduced in the short-term and local efforts focused on the recovery once the economy starts to reopen.

Other trends in the sectors are re-emerging artisan trades and occupations like barbering, brewing and textiles, though still representing low numbers in employment[31]. In addition, rapidly changing consumer behaviours, further accelerated during lockdown, such as switching to purchasing goods and services online, is likely to further dampen employment in retail, as new technologies improve the ease and efficiencies in online browsing and delivery. At the same time, this shift in consumer patterns is likely to increase the demand for postal and transportation services[32].

Employment developments over the past few years have seen mixed fortunes in the trades and transport, while accommodation, representing the well-established tourism, food and beverage services locally have grown significantly with over 6000 more employed in 2018 compared to 2015. As shown in the following dashboards the demand in the sectors has been predominantly for lower skilled workforce (60%+ GCSE Standard) while accommodation (in line with current workforce) had the highest proportion of vacancies (37%) in elementary occupations. In general, these jobs are more prone to automation, with some forecasts estimating that over 60% of tasks in these industries could be automated and together with changes in consumer behaviours mentioned above might mean job losses in the longer term.

[31] Bakhshi, H., Downing, J., Osborne, M., Schneider, P. (2017). The Future of Skills: Employment in 2030. London: Pearson and Nesta.

[32] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Wholesale and Retail Dashboard

Vacancies 2019

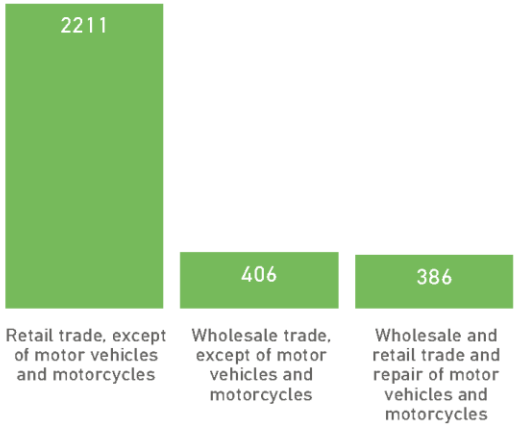
3005

Wholesale and Retail

Occupation

- Customer service occupations n.e.c. — 472
- Sales related occupations n.e.c. — 342
- Vehicle technicians, mechanics and el... — 200
- Sales and retail assistants — 196
- Sales Supervisors — 196
- Pharmacists — 113
- Managers and proprietors in other se... — 111
- Managers and directors in retail and ... — 73

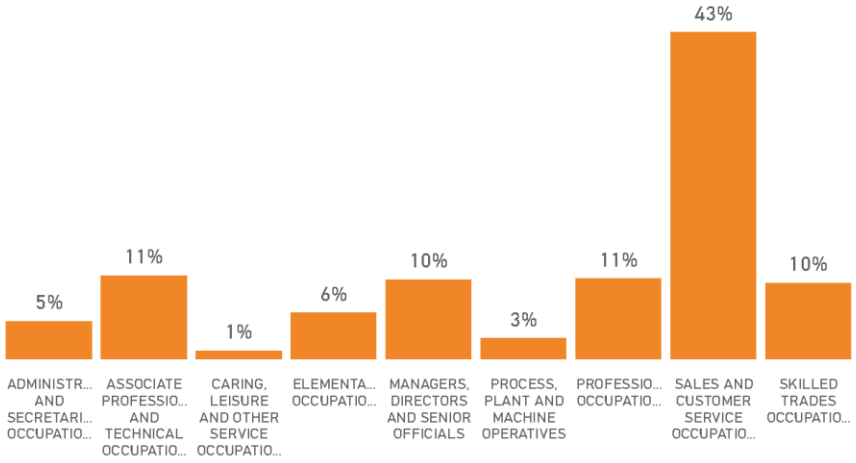
Vacancies by Sector



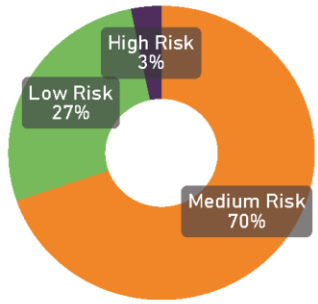
Top 10 Recruiters

Who is hiring?	Vacancies
Tesco Plc	264
Alliance Boots	137
New Look Ltd	109
Asda	77
Travis Perkins	73
Lidl	67
Kingfisher	64
Bargain Booze Limited	63
Specsavers	53
B&Q	45

Vacancies by Occupation (%)



Number of Job Postings by Risk of Automation



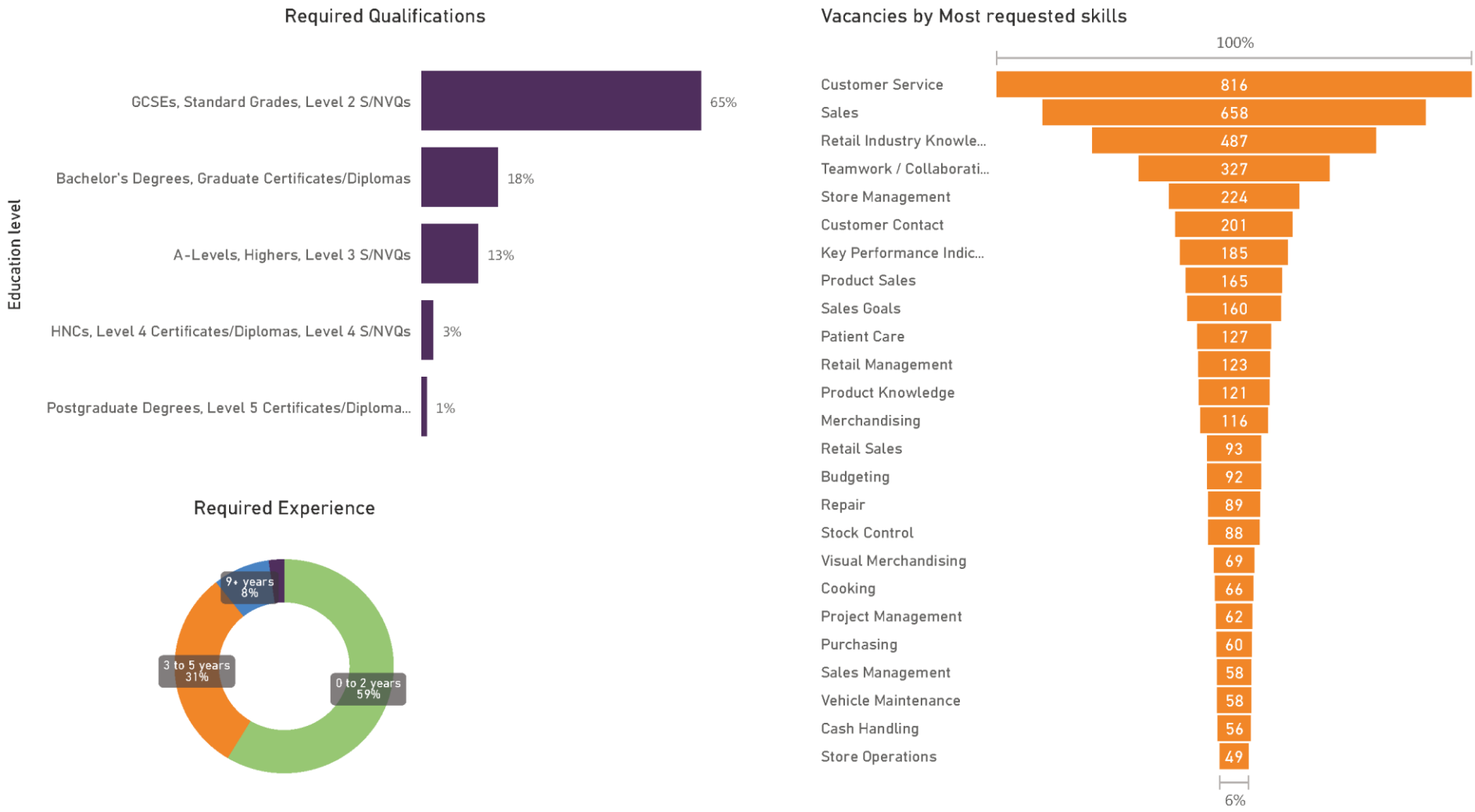


Figure 40. Wholesale and Retail dashboard. Labour Insight – Burning Glass

Accommodation and Food Services dashboard

Vacancies 2019

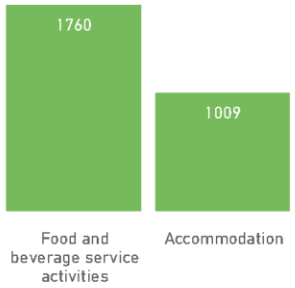
2787

Accommodation and Food Services

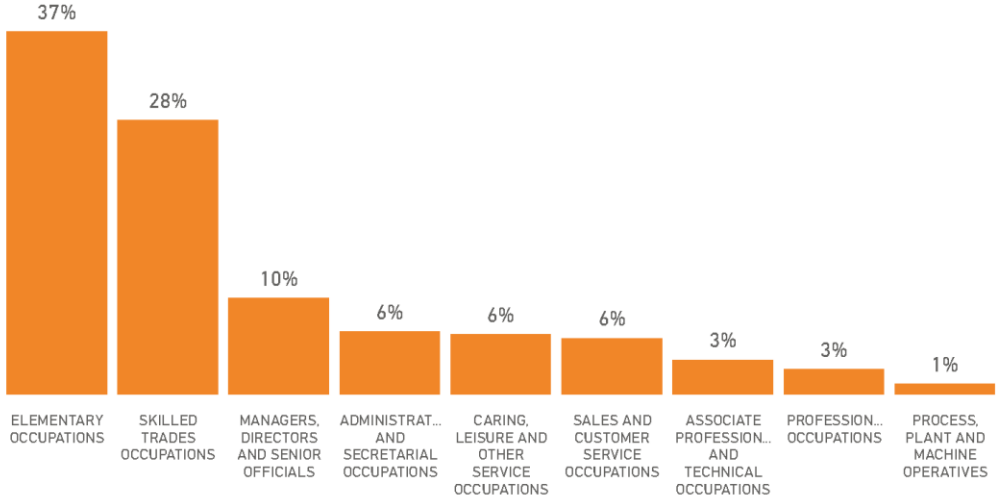
Occupation

Chefs	574
Kitchen and catering assistants	422
Waiters and waitresses	244
Bar staff	201
Catering and bar managers	110
Receptionists	95
Managers and proprietors in other se...	87
Other elementary services occupation...	83

Vacancies by Sector



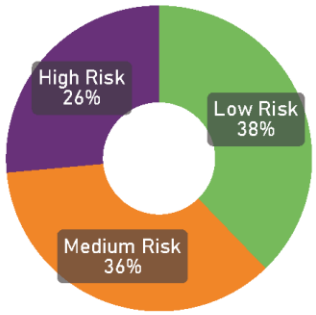
Vacancies by Occupation (%)



Top 10 Recruiters

Employer	Job Postings
Britannia Hotels Limited	170
Bourne Leisure Holdings	123
Whitbread	103
Village Hotels	83
Loungers Limited	65
Greggs	51
Stonegate Pub Company	50
Stable Pizza	44
Harvester	43
Marriott International	42

Vacancies by Risk of Automation



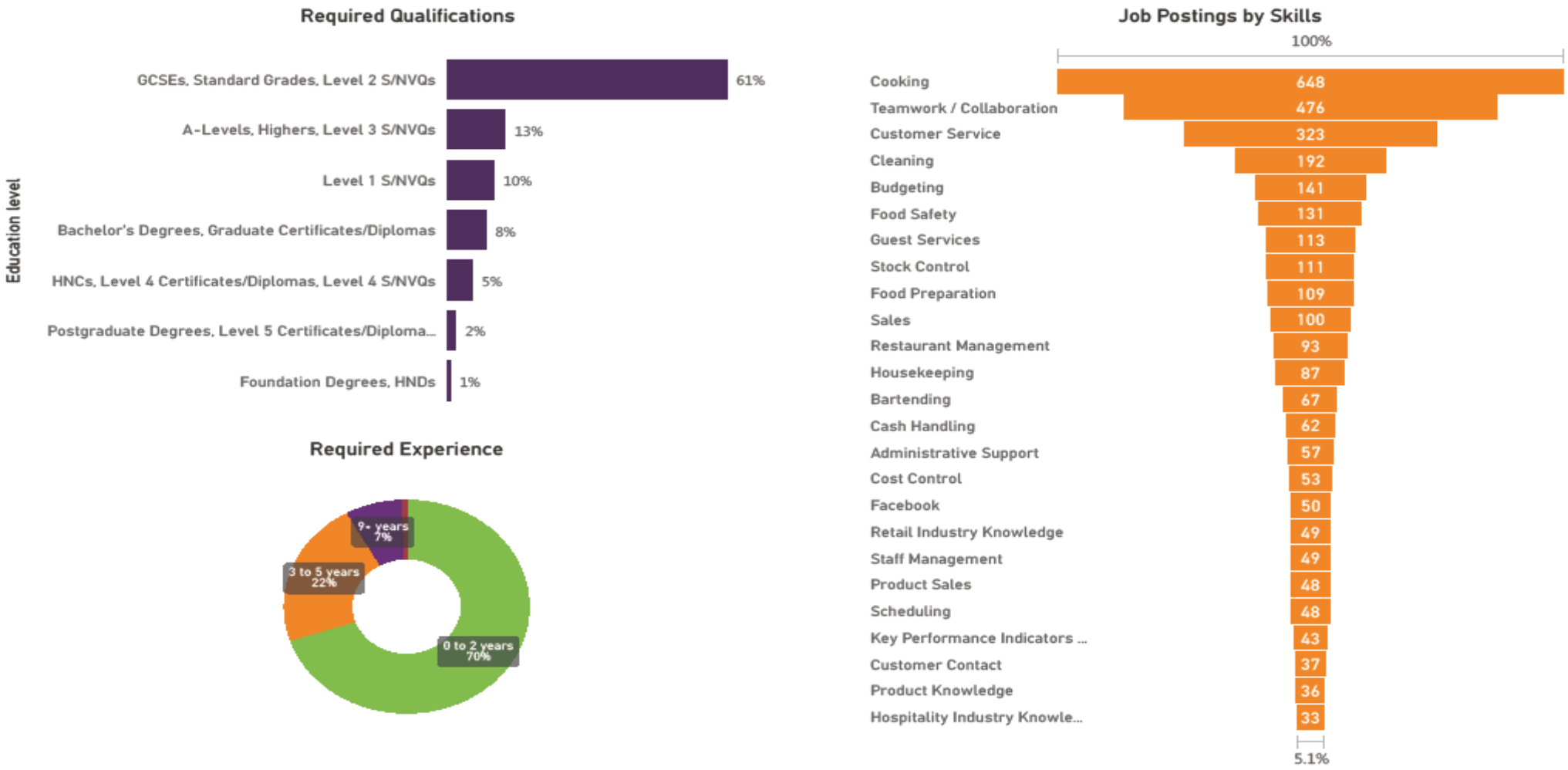


Figure 41. Accommodation and Food Services dashboard. Labour Insight – Burning Glass

Construction

The construction industry in Dorset employs 18,000 people, 2,000 more in 2018 compared to 2015 and it contributes £1.4bn to the economy. Half of the current workforce is currently made up of skilled trades occupations and looking forwards slight shift is expected towards more professional and managerial roles and some decline in skilled trades. As seen in Figure 42, among the 780 jobs advertised online in 2019, 40% were for skilled trades occupations (carpenters, plumbers, bricklayers etc) and over 70% required GCSE standard levels of education.

Table 15. Trades, Accommodation, Transport - ONS BRES 2018 and Working Futures 2017- 2027

Construction	Dorset LEP 2018	UK 2017	UK 2027
Total employment (000s)	18	2,286	2,336
Share of total employment (%)	5.4	6.5	6.5
GVA: (£)	1,383	111,877	121,219
Share of GVA (%)	7.5	6.3	6.0

Projections[34] for the sector suggest modest long-term growth, at an average of 0.8% p.a. upto 2027, whilst employment forecasted to grow by 0.4% over the same period. This is partly driven by an expected slowdown in investment due to uncertainty around Brexit with high concentration of EU migrants (now adding coronavirus restrictions to the mix of unknown variables) as well as the skills shortage facing the sector[33]. Recent reports have shown the sector is struggling to attract and retain young workers and the skills demanded are becoming outdated due to technological advances[34].

However, the sector will continue to deliver long-term major public infrastructure projects and global commitments to climate change and sustainability will be key concerns, generating new opportunities and challenges for the construction sector. Environment policy in the built environment is anticipated to create new opportunities and areas of growth in the sector, as companies seek innovative technologies to adapt to wider environmental concerns.

Integration with technological innovations will become critical to the industry with focus in recent years on "smart construction" and "digital design" growing as initiatives to create smart cities intensify and are likely to contribute to output growth. Traditional construction demand will also continue with UK population growth while expected to slow down is still likely to maintain an increased demand for infrastructure and housing, supported by the government's targets to build new homes[34].

As highlighted above, the industry is likely to be faced with skill shortages linked to significant replacement demand (c8,000 people) expected in Dorset. In order to avoid dampening the sector's growth prospects, efficiencies could be made in some of the elementary and routine activities in the sector (reducing typical costs). Apprenticeships and specialist training will remain important as the sector adapts to technological developments.

[33] City & Guilds Group and The Work Foundation (2018). *Constructing the future: How the skills needed for success in the workplace are changing*. London: City & Guilds. Available from: https://www.cityandguildsgroup.com/research/constructing-the-future-how-the-skills-needed-for-success-in-the-workplace-are-changing

[34] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Construction dashboard

Vacancies 2019

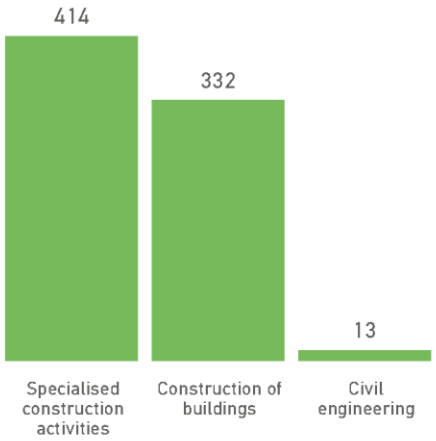
780

Construction

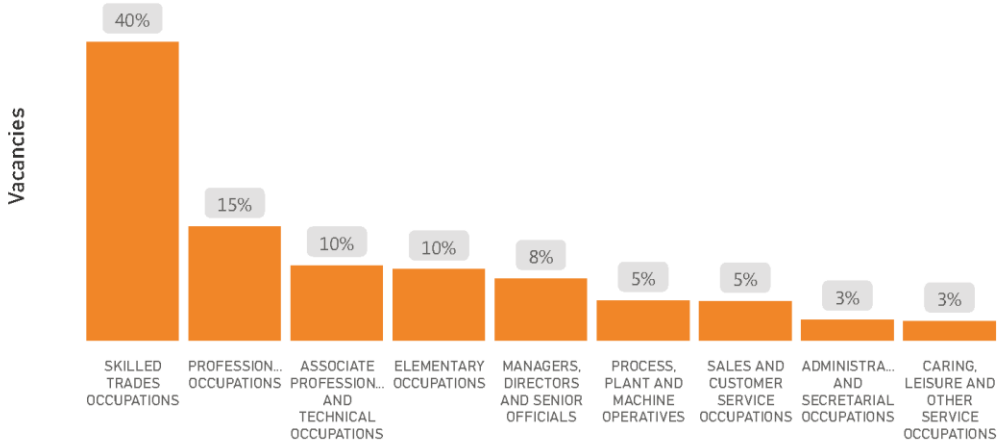
Occupation

- Carpenters and joiners 122
- Plumbers and heating and ventilati... 120
- Production managers and director... 38
- Elementary construction occupati... 37
- Nurses 29
- Sales related occupations n.e.c. 22
- Quantity surveyors 20
- Bricklayers and masons 17

Vacancies by Sector



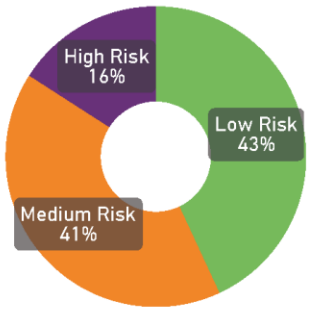
% Vacancies by Occupation



Top 10 Recruiters

Employer	Job Postings
Meridian Corporation Limited	101
Fullers Limited	35
Anglian Home Improvements Group	17
Coop Limited	17
Greenway Partnership Limited	12
Morgan Sindallgroup	10
Property Services Limited	9
Danny Sullivan Group Limited	7
Me Construction Limited	7
Sir Robert Mcalpine Limited	7

Vacancies by Risk of Automation



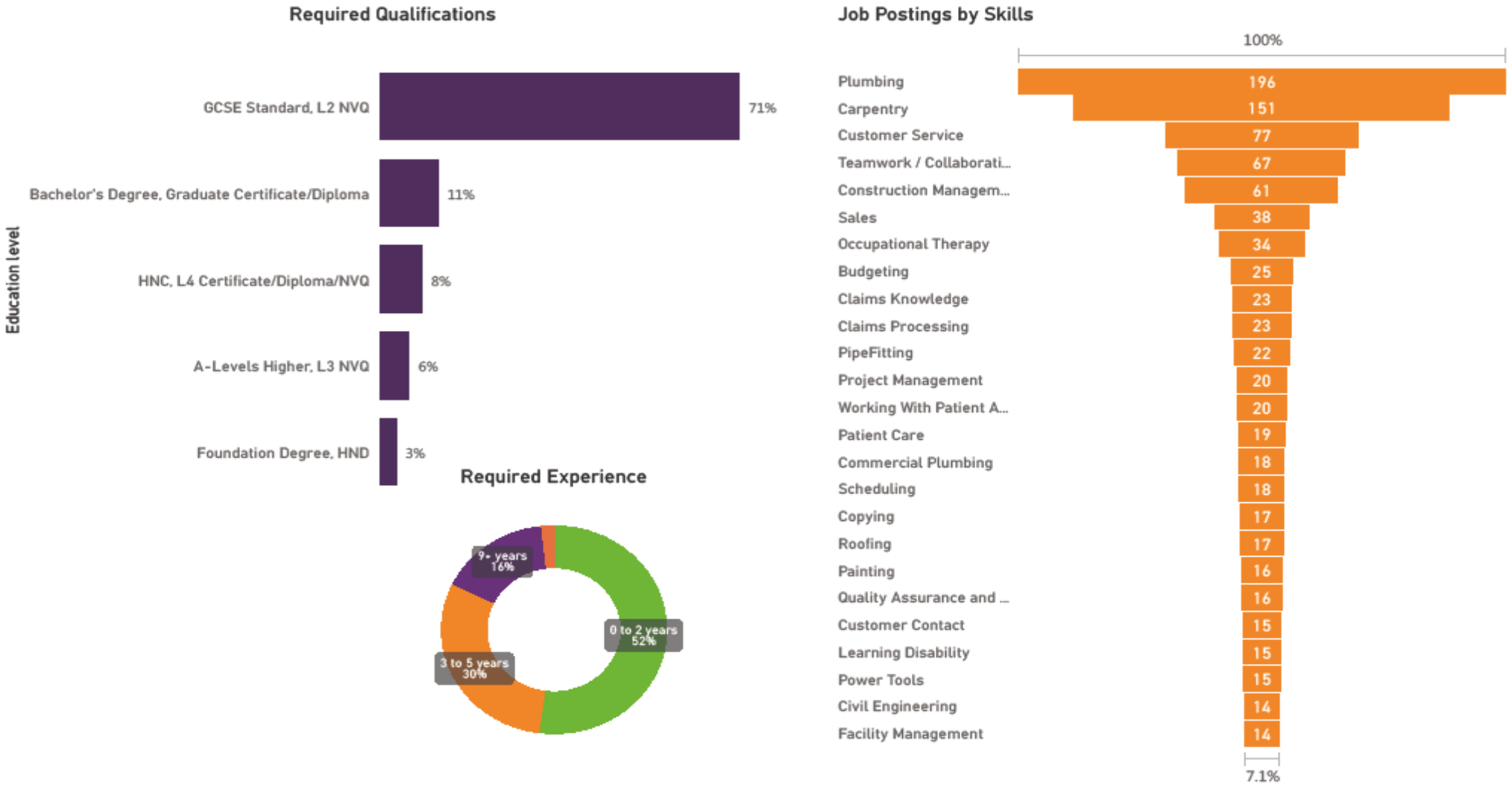


Figure 42. Construction dashboard. Labour Insight – Burning Glass

Business and Other Services

Covering the following sectors:

- Financial and insurance activities
- Professional, scientific and technical activities
- Information technology
- Media
- Arts, entertainment and recreation and other service activities
- Administrative and support services
- Real estate
- Other Services

Business and other services is a major sector grouping covering a wide definition of sectors in Dorset and accounting for over a quarter of the total employment (91,000 - 27%) and a large proportion (£8bn – 43%) of Dorset's £18 bn GVA. These sectors are forecast to continue making considerable contribution in output (Figure 32) and see strong growth in labour demand within Dorset and nationally (see Figure 33 for Dorset and Table 16 below for the UK) and play a major role in technological innovation and progress going forward.

Table 16. Business and other services - ONS BRES 2018 and Working Futures 2017- 2027

Business	Dorset LEP 2018	UK 2017	UK 2027
Total employment (000s)	91	11,176	11,838
Share of total employment (%)	27.3	31.9	32.9
GVA: (£)	7,930	615,240	700,150
Share of GVA (%)	42.9	34.4	34.9

Nationally, the industries expected to make the largest contribution to output growth are financial services, professional, scientific and technical activities, and information technology.[35] Consistent with current trends, the rate of technological progress is forecast to increase; hence, the ability to capture and incorporate innovation in existing processes will likely have a significant impact on the long-term growth and demand.
Correspondingly, the contribution of technology is likely to skew labour demand towards higher-skilled roles, so the availability of individuals with the required skillsets will be an important factor in the fulfilment of the growth potential.
It is expected that in 2027, 60% of all employed in these sectors to be in managerial, professional and associate professional occupations (currently 55%).

In parallel, there will also be notable demand in services that are considered lower skill - personal services and supporting business, such as security and cleaning. This trend of occupational polarisation is seen over the last 20 years and involves decreased demand for mid-skilled workers as predictable physical labour and collecting and processing data activities are getting automated.

There were 8,475 vacancies advertised within these sectors throughout 2019, accounting for 14% of all advertised vacancies in Dorset, which is lower than previous years where numbers varied between c9,300 and c10,400 p.a.

[35] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020

Where recorded, minimum education required for half of the vacancies was level 5 and above with key skills required including customer service, sales and business development, IT productivity tools, project and budget management, business process and analysis.

Considering the prevalence of higher-level skills required within these industry sectors, a recent BEIS research[36] highlighted recruitment, retention and access to highly skilled individuals among the key barriers to growth.

Finance and Insurance

Dorset is known for its thriving financial sector, which is bigger in proportional terms than the UK average – it employs 14,000 people and contributes £1.4bn (8%) to the Dorset's total GVA. GVA has grown by 2mn since 2015 without increasing the overall headcount.

The output growth in the sector is mainly driven by the emerging "FinTech" innovations transforming traditional processes and driving demand for more programming, software development and technical roles. The activity in the sector is concentrated in Bournemouth and Poole, established as a significant financial centre and a location of choice for market leaders Ageas, Barclays, Deutsche Bank, JPMorgan (whose campus is based in Bournemouth and employs 4,000 local people), LV= Liverpool Victoria, Nationwide etc. operating contact centres and headquarters in the area.

The employment demand dashboard is available in Figure 43. Among the 1,747 jobs advertised in the sector throughout 2019:

- over a quarter (27%) were for professional occupations - programmers and software developers, management consultants and business analysts and researchers,
- one fifth (21%) were for sales and customer service occupations and associate professionals (19%) where the financial and investment specialism was concentrated,
- and further 16% were for managers, directors and senior officials - such as chief executives, financial managers and marketing directors.

As discussed in the following section, these occupation groups are expected to see significant demand in the coming years driven by growth, but mainly by the need to replace staff (see

When measured by the proportional contribution of total output (GVA), the sectoral mix within Dorset is not that dissimilar to many other UK regions, while the productivity is lower than the UK average. It has been questioned whether the industrial makeup is a potential explanation for the lower productivity levels. However, ONS analysis of the non-financial business economy suggests that "a region's industry structure appears to only play a relatively small role in productivity differences between regions.".

This research goes on to propose that while different industries have different average levels of productivity – i.e. knowledge intensive services productivity being on average twice as large as productivity in less knowledge-intensive services sectors – it is the firm level productivity that can have a significant effect on aggregate regional productivity. Also that less knowledge intensive sectors are critical in providing bigger proportion of jobs ("in 2015, less knowledge-intensive services sectors generated around 60% of the employment and 42% of the GVA; while knowledge-intensive services sectors generated 20% of the employment and 29% of the GVA in the non-financial business economy across the Great Britain regions and countries").

As modelled in the Dorset Local Industrial Strategy (LIS) evidence base:

[36] Professional & Business Services sector: creating further demand and growth outside London. Department for Business, Energy and Industrial Strategy, February 2020

- If the South West had the same industrial structure as Great Britain whilst maintaining local average firm-level productivity it would equate to 82% of GB average (changing the industrial structure)
- If the South West maintained its regional structure but applied average Great Britain firm-level productivity in each industry, it would equate to 98% of GB average (improving productivity within industrial structure)

It therefore becomes essential to ensure both business and management practices, innovations at firm level and availability of the right skill mix for the industrial and occupational structure in order to drive growth and productivity forward. These elements are essential for the from people and skills perspective because ultimately it is the competitiveness and success of Dorset businesses that will determine the strength of labour demand in the coming years.

Occupational structure and replacement demand section). Overall, almost 80% of all advertised vacancies in the sector required bachelor's degree.

Professional, Scientific and Technical

The sector is employing c.23,000 people in the region (7% of all employed) and contributes £1.1bn GVA to the Dorset economy.

Overall, the numbers in employment in the sector have decreased by 2,000 since 2015 with some decline in legal and architectural and engineering jobs (Table 17). A third (35%) of the jobs are in legal and accounting and another third (30%) in activities of head offices and management consultancy, which have increased in numbers since 2015 as have jobs in advertising and market research and other professional, scientific and technical activities.

The vacancies advertised in the sector over 2019 (Figure 44) broadly mirror these trends with 38% of jobs (n=170) in professional occupations, such as Solicitors, Veterinarians, Programmers etc. and further 22 per cent (n=695) in associate professional occupations such as Legal and Marketing associates. Overall, half of the advertised vacancies required bachelor's degrees and a quarter - level 2 qualifications. The most actively recruiting employer was the global aerospace and marine company Cobham PLC - with over 180 advertised vacancies in a range of engineering, finance, quality and programming professional and associate professional occupations.

Table 17. Professional, scientific and technical activities subsectors employment 2015-18. ONS Business Register and Employment Survey

Industry	2015	2016	2017	2018
M : Professional, scientific and technical activities	**25,000**	**20,000**	**23,000**	**23,000**
69 : Legal and accounting activities	9,000	7,000	8,000	8,000
70 : Activities of head offices; management consultancy	6,000	5,000	7,000	7,000
71 : Architectural and engineering; technical testing and analysis	6,000	4,000	4,000	4,000
72 : Scientific research and development	700	900	800	700
73 : Advertising and market research	1,000	800	1,500	1,250
74 : Other professional, scientific and technical activities	1,250	1,500	1,750	1,750
75 : Veterinary activities	1,250	900	700	800

The Information Technology sector employs c9,000 people in the region (3% of all employed) and contributes £677m GVA to the Dorset economy. A significant sector for future growth it is both smaller and tends to have lower productivity in Dorset in comparison to the national average (Table 9). The numbers in employment in the sector have increased by 1,000 between 2015 and 2018 and 817 job vacancies were advertised throughout 2019, half of them (n=384) in the Computer programming, consultancy and related activities sub-sector.

There were over 11,000 people employed in the **Arts, Entertainment and Recreation** sector in 2018 and 7,000 in **Other Service** activities in the region**.** Jointly these sectors employ over 5% of all employed in the region and contribute £726mn, or 4%, of total GVA in the Dorset economy.

Throughout 2019 over 950 job vacancies were advertised within them with BH Live - the leading operator of leisure and event venues based in Bournemouth and Poole - the largest recruiter. Just under a quarter (n=222, 23%) of advertised jobs were for **Caring, Leisure and Other service** occupations including care workers, hairdressers, barbers, beauticians and health and leisure assistants and similar numbers (n=205, 22%) were for Associate Professional and Technical occupations such as fitness instructors, HR and IT associate professionals etc.

These occupations are expected to see around 5% increased demand in both expansion and replacement in the following years while **Arts, Entertainment and Recreation** has already experienced a stable upward employment trend between 2015 and 2018 reaching an almost 30% job growth.

Albeit lower in proportion terms than the national average, **administrative and support service** is another significant sector in terms of employment (c19,000 employees and £489mn GVA) within this definition. The sector experienced a growth in employment over the 2015-17 period, but returned back to its 2015 levels in 2018. Throughout 2019 over 1,350 job vacancies were advertised in a range of subsectors, over 60% (n=841) in office administrative, office support and other business support activities, where the replacement demand is expected to be decreasing over the coming years.

Finance and Insurance dashboard

Vacancies 2019

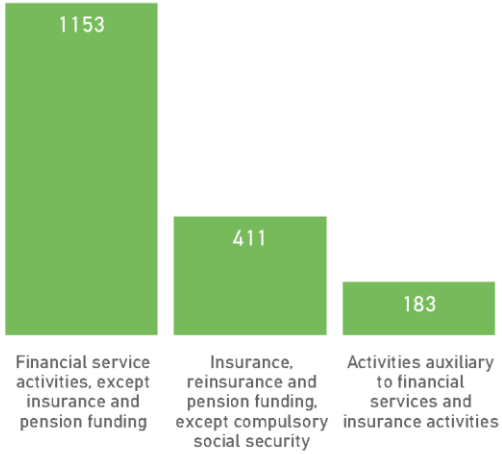
1747

Finance and Insurance

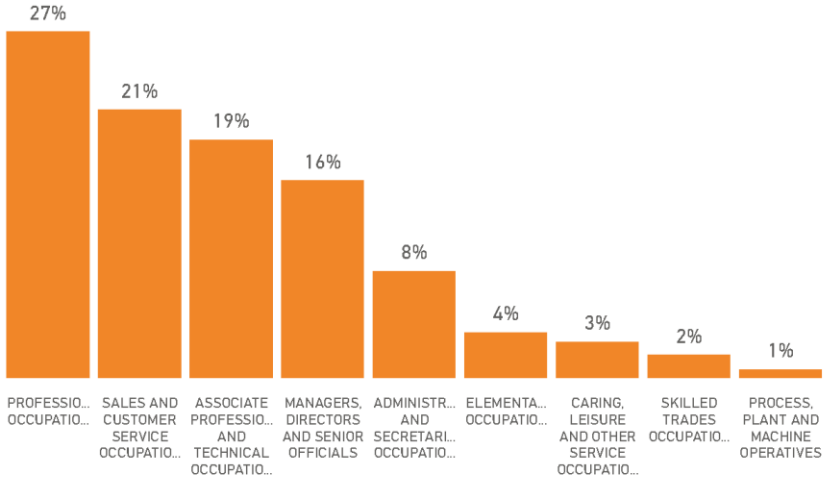
Occupation

- Sales related occupations n.e.c. 155
- Customer service occupations n.e.c. 147
- Programmers and software developm... 95
- Managers and proprietors in other se... 94
- Finance and investment analysts and ... 91
- Management consultants and busines... 72
- Other administrative occupations n.e.c. 66
- Chief executives and senior officials 43

Vacancies by Sector



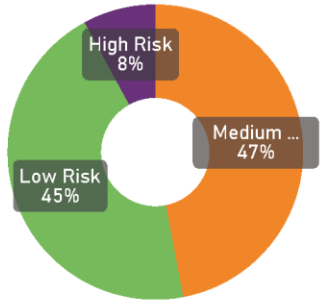
Vacancies by Occupation (%)



Top 10 Recruiters

Who is hiring?	Vacancies
JPMorgan Chase & Co	575
BUPA	93
Nationwide Building Society	59
Bestway Group	53
Ageas Insurance Limited	41
Gattaca Plc	32
Ageas (UK) Limited	25
Protect Line Ltd	25
Stride Limited	23
The Bank Of New York Mellon	23

Number of Job Postings by Risk of Automation



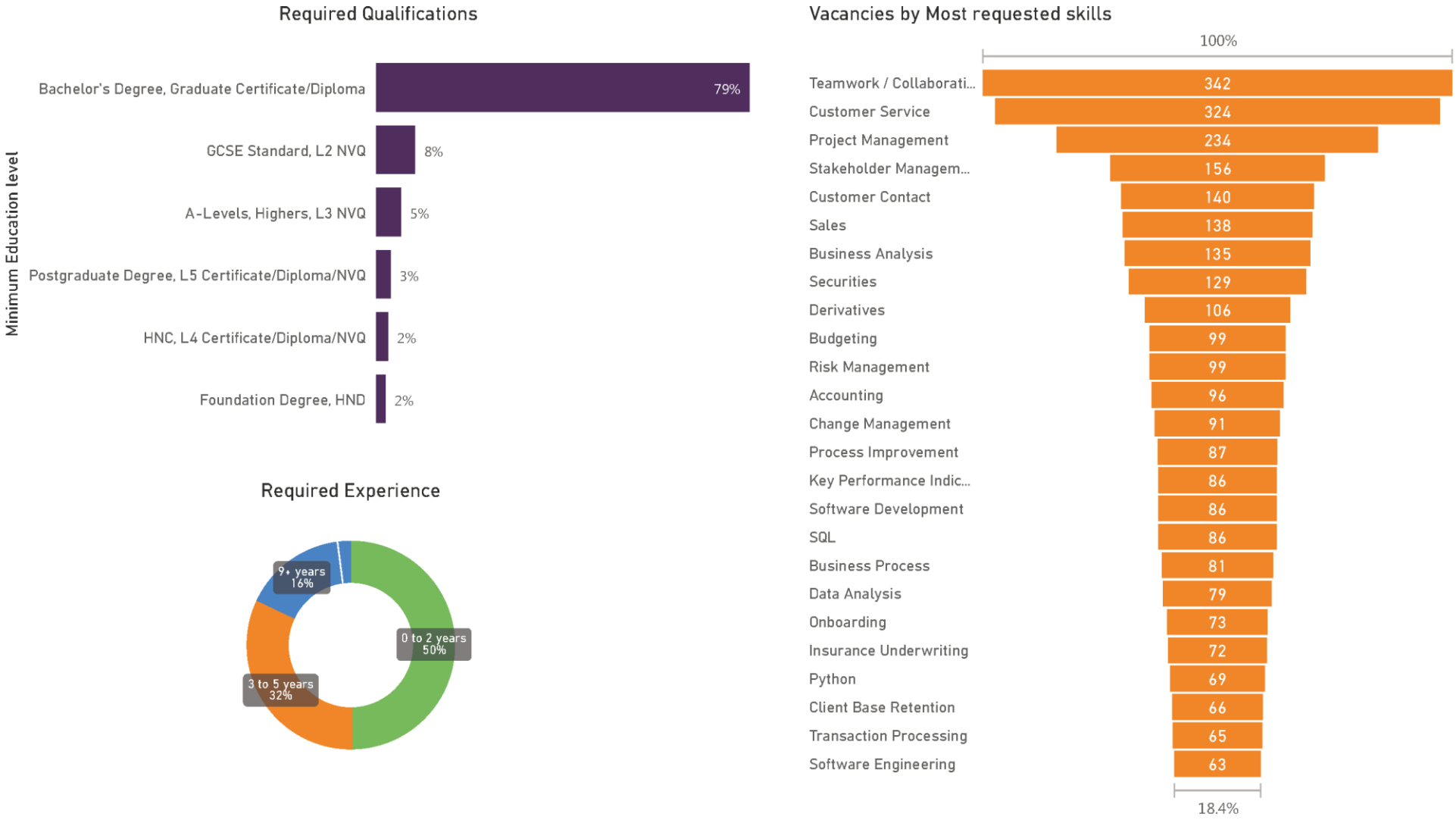


Figure 43. Finance and Insurance dashboard. Labour Insight – Burning Glass

Professional, Scientific and Technical Dashboard

Vacancies 2019

3123

Professional Schientific & Technical

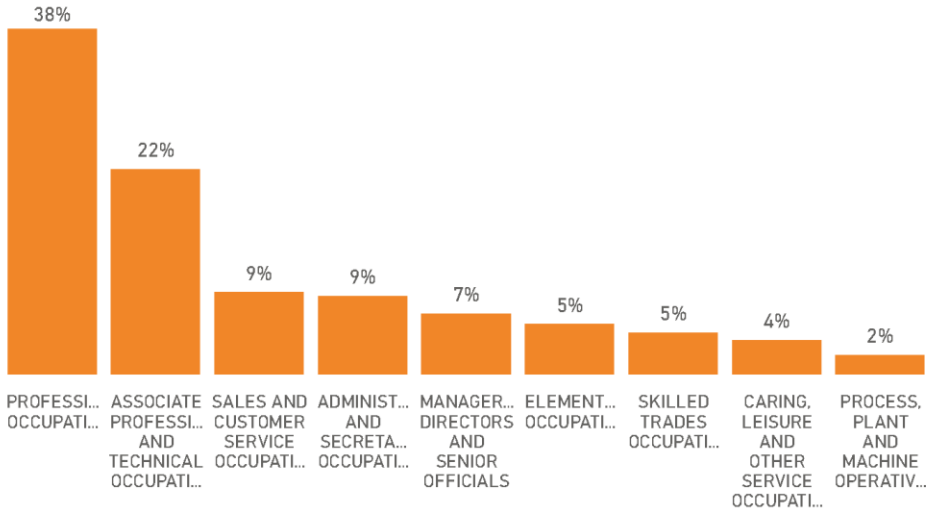
Occupation

- Solicitors 525
- Legal associate professionals 140
- Veterinarians 115
- Sales related occupations n.e.c. 111
- Legal secretaries 99
- Kitchen and catering assistants 94
- Programmers and software developm... 79

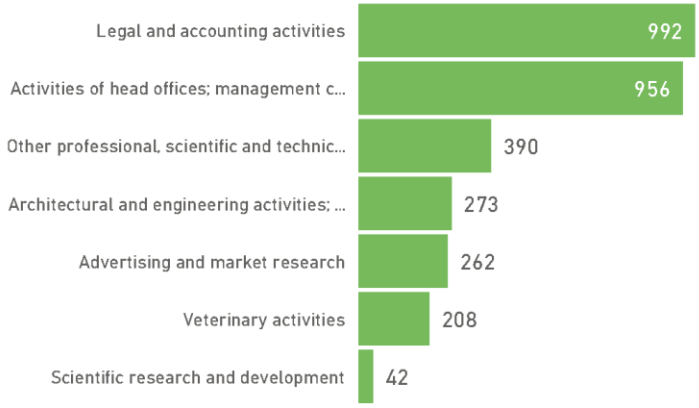
Top 10 Recruiters

Who is hiring?	Vacancies
Cobham Plc	183
Co-Operative Group Limited	130
Siemens	106
Rise Limited	91
Compass Group Plc	75
Hoburne Limited	75
Word360	37
Meggitt Plc	35
Bidvine	30
Marine Resources Ltd	28

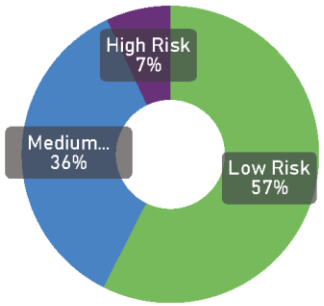
Vacancies by Occupation (%)



Vacancies by Sector



Number of Job Postings by Risk of Automation



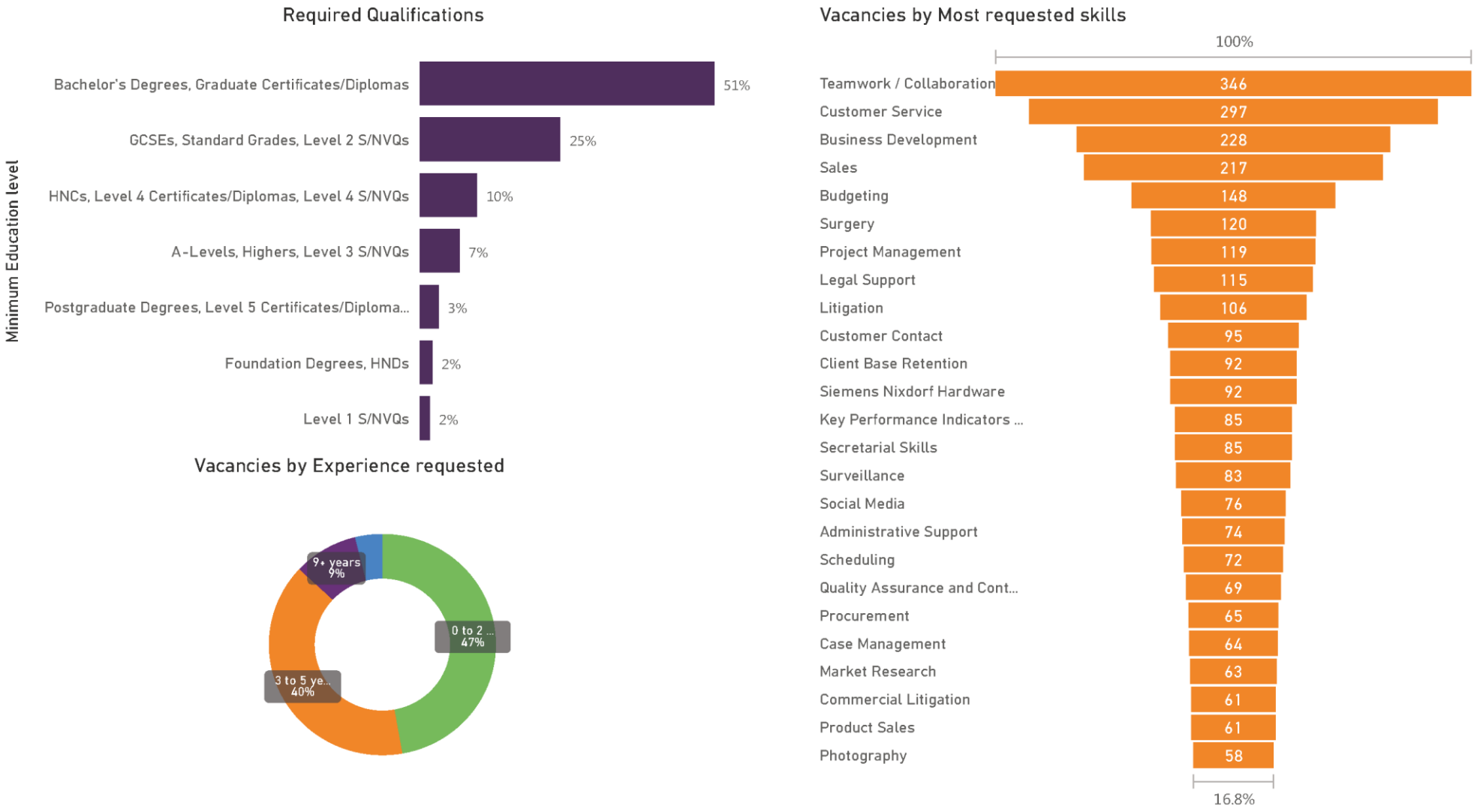


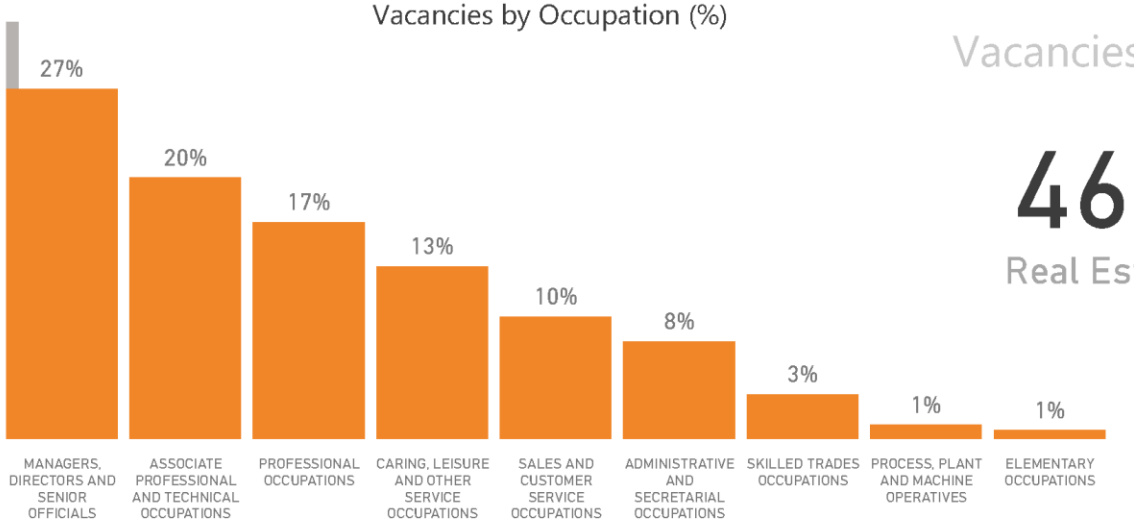
Figure 44. Professional, Scientific and Technical Dashboard. Labour Insights – Burning Glass Technologies

Real Estate Dashboard

Occupation

- Property, housing and estate managers
  84
- Care workers and home carers
  52
- Estate agents and auctioneers
  45
- Sales related occupations n.e.c.
  29
- Solicitors
  28
- Legal associate professionals
  18
- Other administrative occupations n.e.c.
  18
- Marketing and sales directors
  17
- Managers and proprietors in other services n.e.c.
  11
- Book-keepers, payroll managers and wages clerks
  7

Vacancies by Occupation (%)



Vacancies 2019

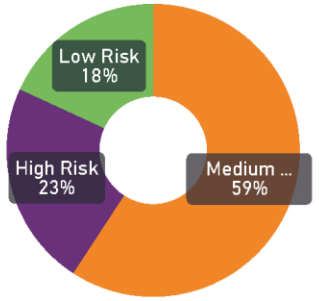
463

Real Estate

Top 10 Recruiters

Employer	Job Postings
Sunrise Senior Living Ltd	34
Apex Prime Care Ltd	23
Leaders Limited	19
Poole Housing Partnership Limited	14
The Olive Tree Limited	13
Guardian Ltd	12
Portland Corporation Limited	11
Savills	8
Atlantic Corporation Limited	7
Austin & Wyatt Limited	7
Testlink Limited	7

Number of Job Postings by Risk of Automation



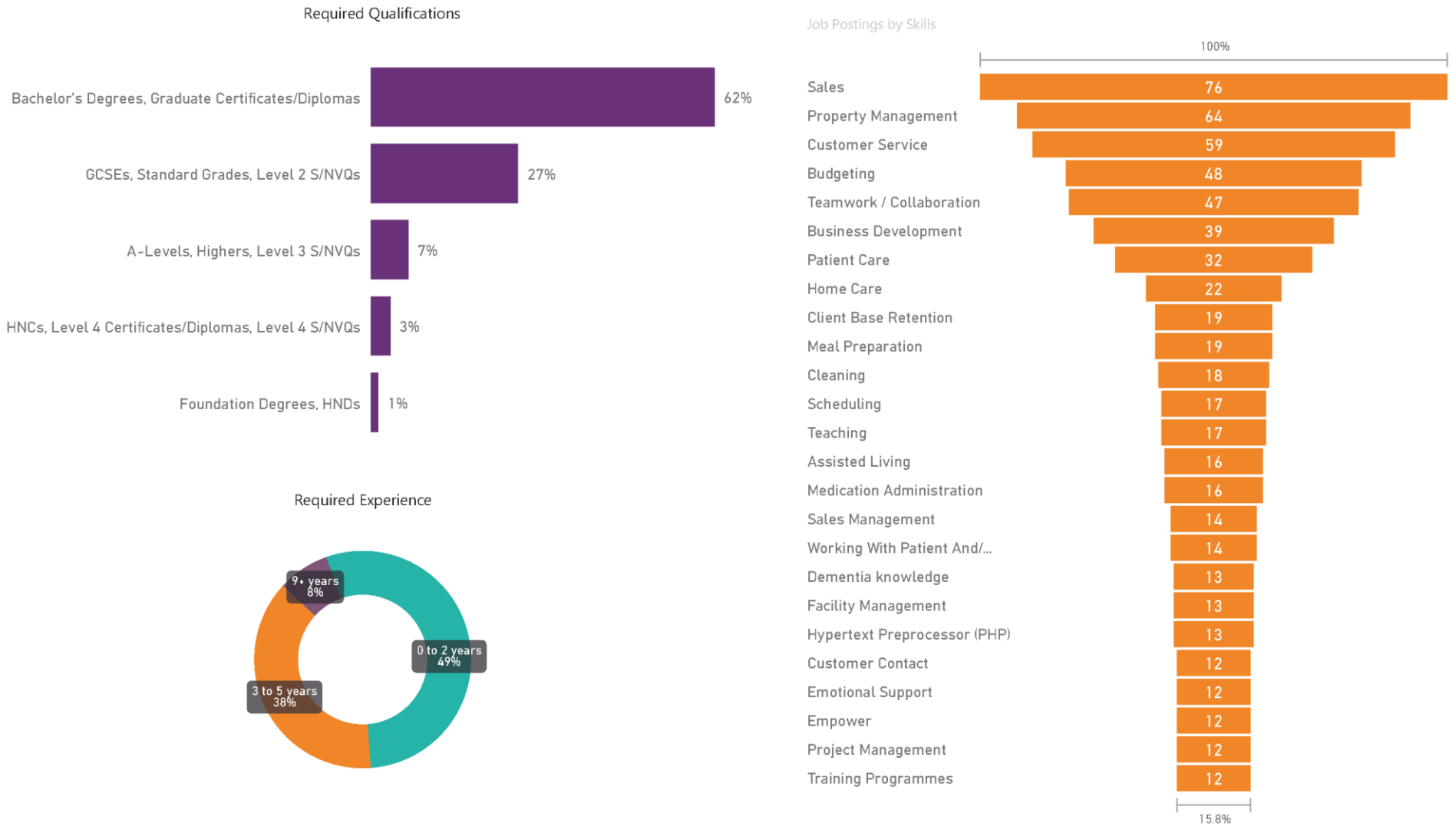


Figure 45. Real estate dashboard. Labour Insight – Burning Glass

Primary sector and utilities

Sectors include:

- Agriculture
- Mining and quarrying
- Electricity and gas
- Water and Sewerage

The primary sector employs 6,800 (2%) people in Dorset and contributes £ 740mn to the economy (4% of the GVA). Among the 330 jobs advertised online in 2019, 19% were for professional occupations (engineers, architects, project managers, analysts etc), 17% for managerial and 16% for associate professionals.

It has been projected[37] that improved productivity and efficiency savings may reduce traditional labour demand. Energy policies and environmental legislation are likely to grow in importance, and further investment in "agri-tech" is expected to grow agricultural output. There may be a shift to more activities oriented towards 'clean growth' and environmental preservation. The focus of the developing Agricultural Bill represents a shift from agricultural production to environmental stewardship, potentially requiring new skills and increased productivity within the sector i.e. producing more from less land resource devoted to production.

Dorset's Aquaculture sector has also been identified by the Department for International Trade (DIT) as a High Potential Opportunity for inward investment. The county is also home to Cefas (Centre for Environment Fisheries & Aquaculture Science), a world leader in marine science and technology.

This is likely to create new apprenticeship opportunities, jobs and growth in output.

Concluding remarks on industry mix and productivity in Dorset

When measured by the proportional contribution of total output (GVA), the sectoral mix within Dorset is not that dissimilar to many other UK regions, while the productivity is lower than the UK average. It has been questioned whether the industrial makeup is a potential explanation for the lower productivity levels. However, ONS analysis of the non-financial business economy suggests that "a region's industry structure appears to only play a relatively small role in productivity differences between regions."[38].

This research goes on to propose that while different industries have different average levels of productivity – i.e. knowledge intensive services productivity being on average twice as large as productivity in less knowledge-intensive services sectors – it is the firm level productivity that can have a significant effect on aggregate regional productivity. Also that less knowledge intensive sectors are critical in providing bigger proportion of jobs ("in 2015, less knowledge-intensive services sectors generated around 60% of the employment and 42% of the GVA; while knowledge-intensive services sectors generated 20% of the employment and 29% of the GVA in the non-financial business economy across the Great Britain regions and countries").

As modelled in the Dorset Local Industrial Strategy (LIS) evidence base[39]:

- If the South West had the same industrial structure as Great Britain whilst maintaining local average firm-level productivity it would equate to 82% of GB average (changing the industrial structure)

[37] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE 2020
[38] ONS, Regional firm-level productivity analysis for the non-financial business economy, Great Britain: April 2018
[39] Dorset LIS Evidence base - https://www.dorsetlep.co.uk/local-industrial-strategy

- If the South West maintained its regional structure but applied average Great Britain firm-level productivity in each industry, it would equate to 98% of GB average (improving productivity within industrial structure)

It therefore becomes essential to ensure both business and management practices, innovations at firm level and availability of the right skill mix for the industrial and occupational structure in order to drive growth and productivity forward. These elements are essential for the from people and skills perspective because ultimately it is the competitiveness and success of Dorset businesses that will determine the strength of labour demand in the coming years.

Occupational structure and replacement demand

Having reviewed the broad industrial mix and future projections, this section looks closer at the occupations engaged within industries in Dorset LEP and their developments and replacement projections in order to estimate future demand.

A note of warning should be made that here we analyse past trends and present future projections based on them. These insights would therefore not reflect the unprecedented shock to the economy caused by the pandemic where occupational demand has largely stalled and many people are facing the prospect of unemployment. Short-term recovery planning and response should therefore be based on more immediate data that is provided in recent monitoring updates, while this work looks at the trends to inform longer-term strategic planning.

Changing occupational structures are a constant part of a dynamic economy. They are driven by long-term trends, including employment patterns and technological and organisational factors. Occupational projections[37] for the next few years (made prior to the coronavirus pandemic), illustrated in Figure 46, suggest that employment demand will continue to shift in favour of higher skilled occupations, with growth in most professional and associate professional, technical and management jobs (see Table 18 - SOC 2010 Major Groups 1-3). These are also the occupations within which largest number of people are engaged in Dorset - almost half of all employed (c.182,000, 49%) as shown in Figure 47. Polarisation of demand will also mean lower skilled occupations including caring and elementary occupations are also expected to see significant demand, with jobs in the care sector growing with higher rates than the rest of the UK. Job declines are likely for administrative & secretarial occupations, skilled trade occupations and process, plant and machine operatives.

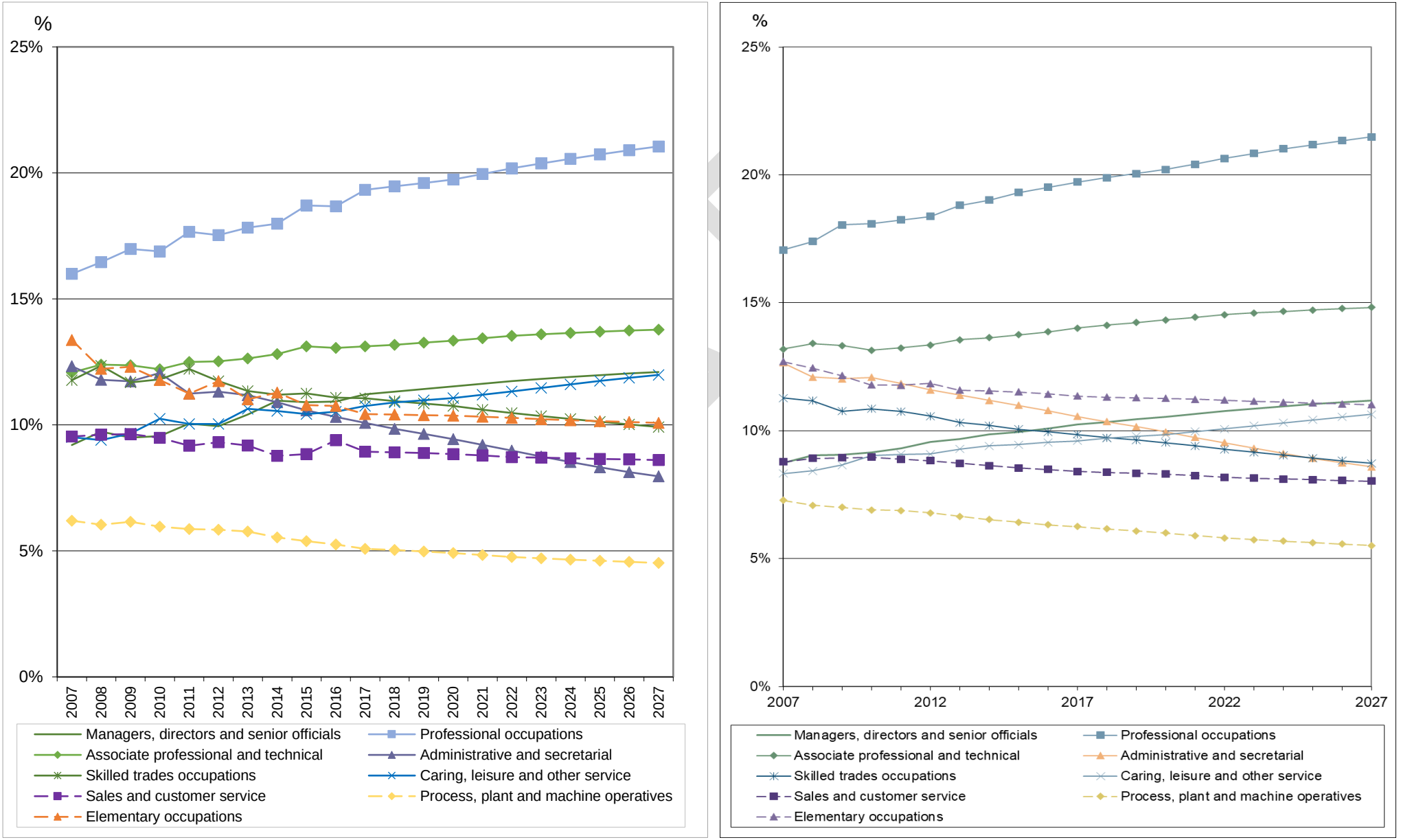


Figure 46. Occupational trends 2007-2027 – employment share. Left - Dorset, Right – UK. Working Futures, Cambridge Econometrics

The following graphs show the current distribution of employment within broad occupations (as defined by major SOC2010 occupation groups) in Dorset (Figure 47) and the projected developments (in thousands) upto 2027 (Figure 48).

Figure 47. Employment by occupation in Dorset Annual Population Survey Oct 2018-Sep 2019, ONS

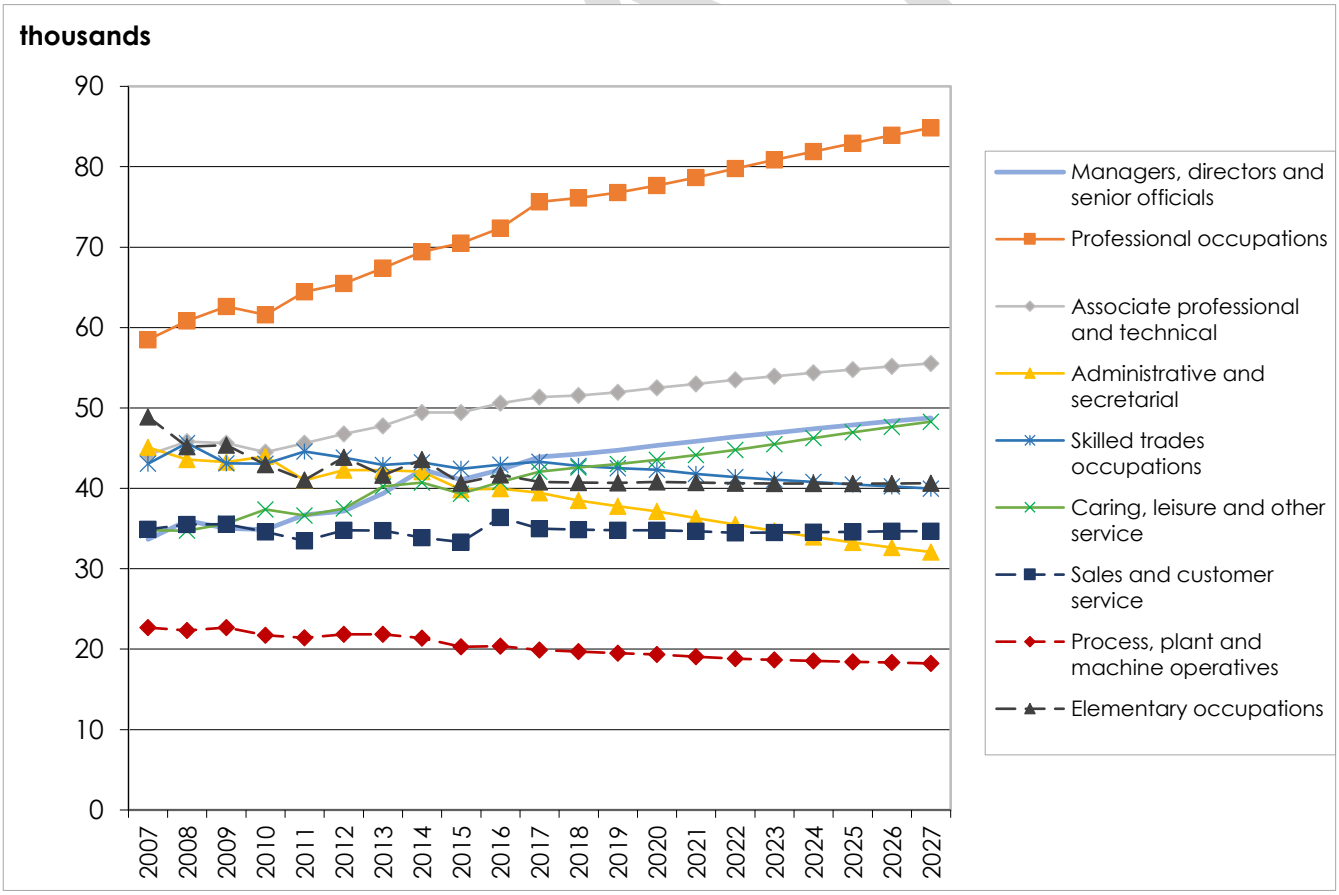


Figure 48. Working Futures employment (thousands) by occupation projections Dorset, 2007-2027

These historical and projected movements are illustrated over 5 year's periods below, showing consistency in the occupational shifts.

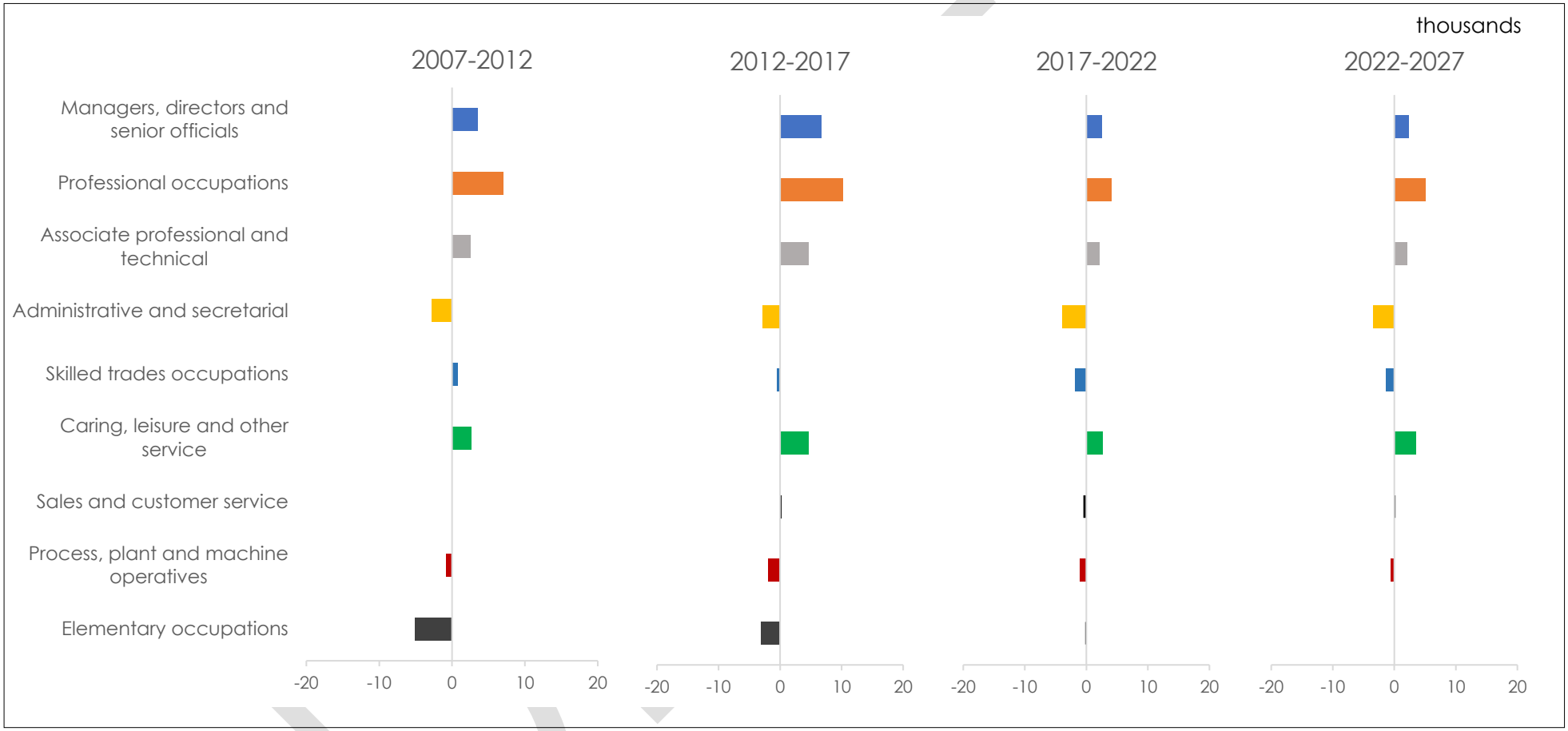


Figure 49. Changes in Occupational Employment Structure in Dorset (000s) (SOC 2010), 2007-2027. Working Futures, Cambridge Econometrics, 2020

These findings raise important questions on industry performance as high demand in particular occupations is likely to have implications across multiple industries.

The sectoral distribution of occupations (Figure 50) demonstrates how for example, high demand and possible shortage of managers would be likely experienced most in Finance, Food and Tourism, but also to a lesser extend in Public sector, Education, Health and Manufacturing.

Similarly, a shortage of Professional occupations is expected to have the most impact on Public sector - Health and Education but also affect most other sectors, such as Finance, Transport and Construction. Such shortages and disruptions caused by lack of key staff are likely to disrupt operations, stifle growth and further depress productivity.

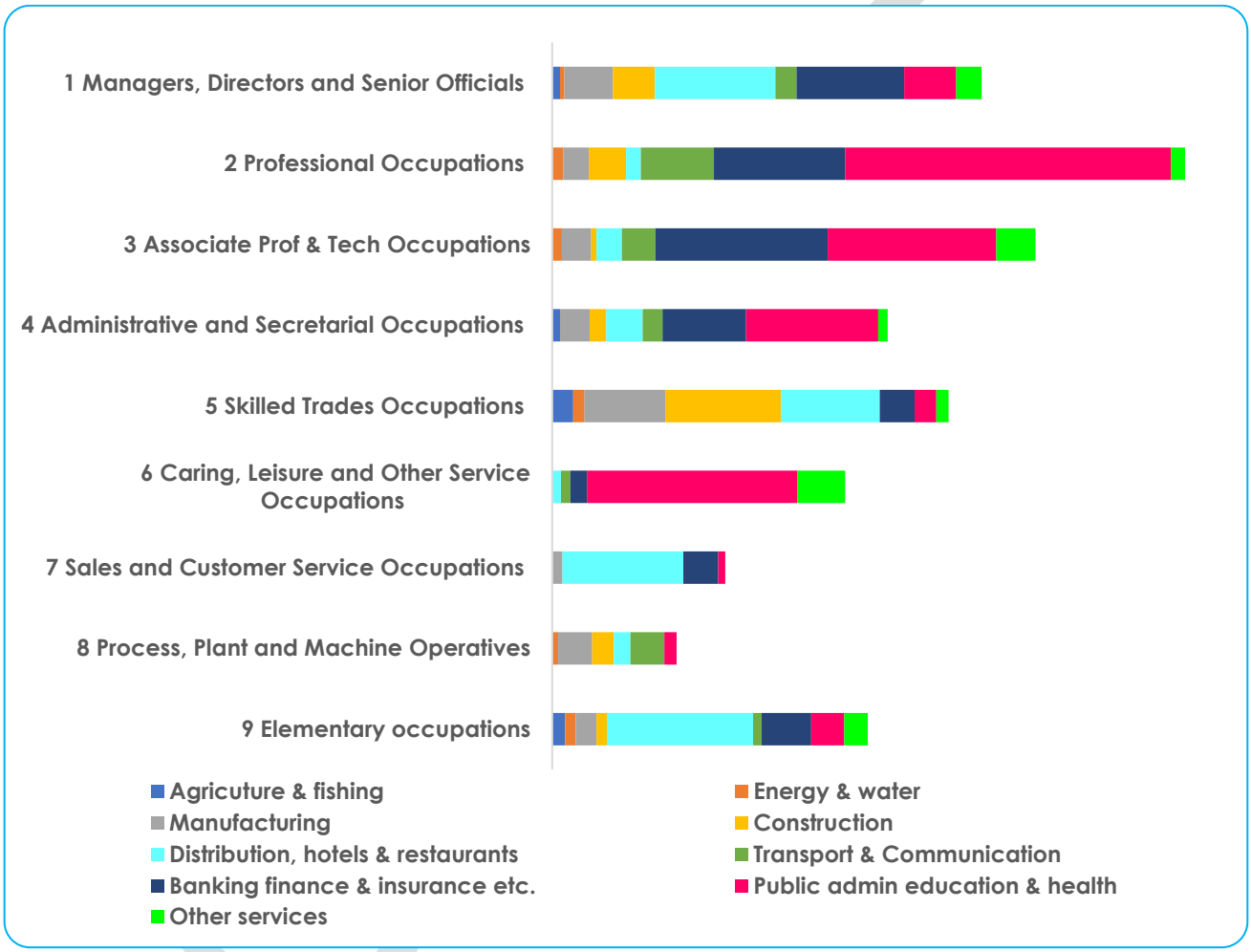


Figure 50. Distribution of Occupation groups across industry sectors in Dorset LEP. ONS Annual Population Survey Oct 2018-Sep 2019 (Nomis). Note. *Certain values have been suppressed – most notably for agriculture due to small or disclosive sample.*

Below are the subgroups within these major occupational groups (as defined in SOC 2010) that we use in the following charts to illustrate the demand at a more granular level:

Table 18. ONS Standard Occupational Classification (SOC 2010) Hierarchy

1: MANAGERS, DIRECTORS AND SENIOR OFFICIALS	**5: SKILLED TRADES OCCUPATIONS**
11: CORPORATE MANAGERS AND DIRECTORS	51: SKILLED AGRICULTURAL AND RELATED TRADES
12: OTHER MANAGERS AND PROPRIETORS	52: SKILLED METAL, ELECTRICAL AND ELECTRONIC
2: PROFESSIONAL OCCUPATIONS	53: SKILLED CONSTRUCTION AND BUILDING TRADES
21: SCIENCE, RESEARCH, ENGINEERING AND TECHNOLOGY PROFESSIONALS	54: TEXTILES, PRINTING AND OTHER SKILLED TRADES
22: HEALTH PROFESSIONALS	**6: CARING, LEISURE AND OTHER SERVICE OCCUPATIONS**
23: TEACHING AND EDUCATIONAL PROFESSIONALS	61: CARING PERSONAL SERVICE OCCUPATIONS
24: BUSINESS, MEDIA AND PUBLIC SERVICE PROFESSIONALS	62: LEISURE, TRAVEL AND RELATED PERSONAL SERVICE OCCUPATIONS
3: ASSOCIATE PROFESSIONAL AND TECHNICAL OCCUPATIONS	**7: SALES AND CUSTOMER SERVICE OCCUPATIONS**
31: SCIENCE, ENGINEERING AND TECHNOLOGY ASSOCIATE PROFESSIONALS	71: SALES OCCUPATIONS
32: HEALTH AND SOCIAL CARE ASSOCIATE PROFESSIONALS	72: CUSTOMER SERVICE OCCUPATIONS
33: PROTECTIVE SERVICE OCCUPATIONS	**8: PROCESS, PLANT AND MACHINE OPERATIVES**
34: CULTURE, MEDIA AND SPORTS OCCUPATIONS	81: PROCESS, PLANT AND MACHINE OPERATIVES
35: BUSINESS AND PUBLIC SERVICE ASSOCIATE PROFESSIONALS	82: TRANSPORT AND MOBILE MACHINE DRIVERS AND OPERATIVES
4: ADMINISTRATIVE AND SECRETARIAL OCCUPATIONS	**9: ELEMENTARY OCCUPATIONS**
41: ADMINISTRATIVE OCCUPATIONS	91: ELEMENTARY TRADES AND RELATED OCCUPATIONS
42: SECRETARIAL AND RELATED OCCUPATIONS	92: ELEMENTARY ADMINISTRATION AND SERVICE OCCUPATIONS

Their representation in Dorset is illustrated in Figure 51, showing employment by occupational subgroup with UK as a reference.

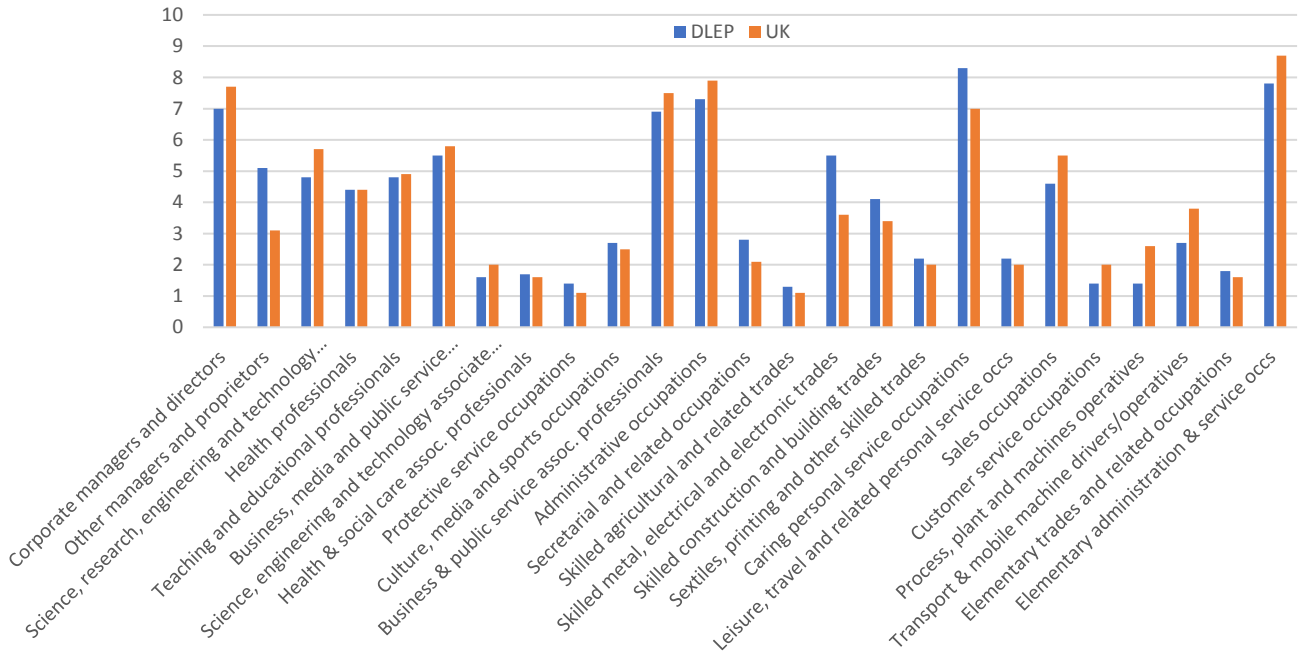


Figure 51. Occupational breakdown (% of those employed). **Annual Population Survey – ONS**

Based on these data, Dorset's occupational profile is largely similar to that seen nationally with a higher proportion of people engaged as 'managers', skilled trades including 'skilled metal, electrical and electronic trades' and 'skilled construction trades, as well as 'caring' occupations.

As already shown, the workforce occupational structure of the county has changed over the past decade and will continue to shift. We established the major occupational groups' trends, but looking at subgroup level provides some further insight.
Figure 52 illustrates these movements for each subgroup, where its proportion of the total Dorset workforce has changed (either positively or negatively) between 2007 and 2017 and how it is projected to change over the period from 2017 until 2027.
There is some variability within the major groups with consistent growth across all professional, associate professional (with the exception of protective service) and management occupations and consistent decline across administrative and skilled trades (with the exception of skilled building trades) occupations. Furthermore, the table below highlights the occupational subgroups that are predicted to see greater change (1+ percentage point).

Table 19. Occupations to increase/ decrease by 1+% between 2017 and 2029 (Dorset). Working Futures, Cambridge Econometrics, 2020

SOC 2010	Occupations to increase by 1+%	2017-2027
Sales and customer service	72 Customer service occupations	1.3 ▲
Caring and leisure	61 Caring personal service occupations	1.7 ▲
Associate professionals	35 Business and public service associate professionals	1.0 ▲
Professionals	32 Health and social care associate professionals	1.6 ▲
Professionals	24 Business, media and public service professionals	1.1 ▲
Professionals	23 Teaching and educational professionals	1.1 ▲
Professionals	22 Health professionals	1.5 ▲
Managers	11 Corporate managers and directors	1.3 ▲
	Occupations to decrease by 1+%	**2017-2027**
Process, plant and machine	81 Process, plant and machine operatives	-2.5 ▼
Skilled trades	54 Textiles, printing and other skilled trades	-1.9 ▼
Skilled trades	52 Skilled metal, electrical and electronic trades	-1.4 ▼
Admin and secretarial	42 Secretarial and related occupations	-6.3 ▼
Admin and secretarial	41 Administrative occupations	-1.2 ▼

Overall, being based on recent trends, these projections partly reflect the growth/decline in occupations over the past few years (largely reflecting extrapolation of near-term trends, which are already occurring) and in part, may reflect factors such as automation/digitisation which are being developed and used in some sectors. The projections however do not 'model' expectations regarding automation/digitisation.

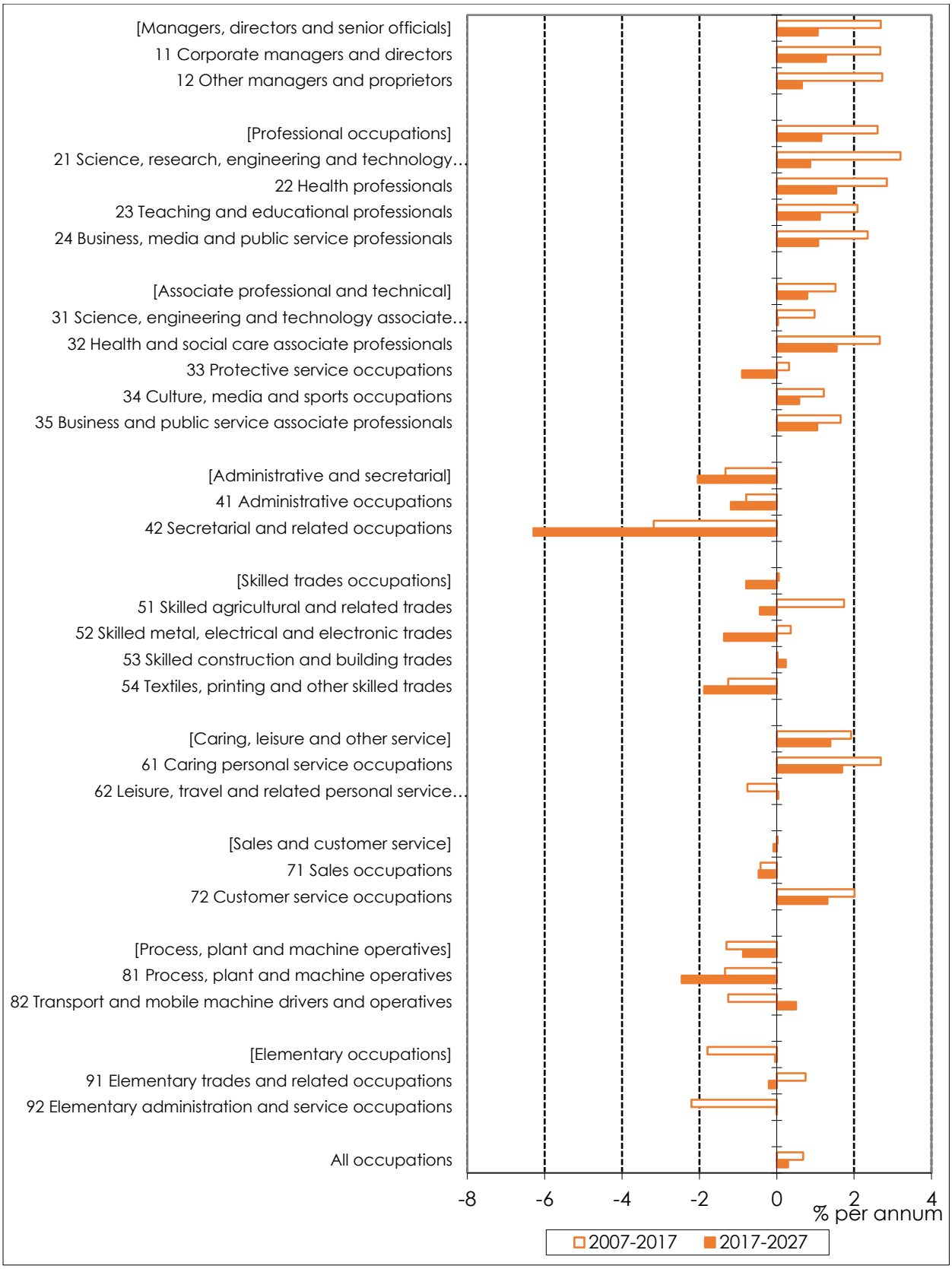


Figure 52. Absolute changes in employment by occupation (SOC 2010), 2007-2017 and 2017-2027. Working Futures. Cambridge Econometrics, 2020

The demographic structure of Dorset means that a key influence on the scale and shape of future labour demand will be related to 'replacement demand' (occurring as a result of people leaving jobs due to retirement and/or occupational mobility). The larger proportion of people aged 50+ in Dorset means replacement demand will be much stronger than in other areas of the UK. While the *principle* of replacement is important in determining future labour demand, its scale is implicitly uncertain and less emphasis should be placed on actual projected numbers.
Local modelling[40] has been utilised to understand the broad quantum of how the two drivers of future labour demand (expansion and replacement) may develop over time. Note that the work has been completed prior to coronavirus developments and may now differ due to dynamic changes in the economy. The projections are based on a 'trend scenario' i.e. that previous trends in the Dorset economy are broadly sustained and there are no significant policy/ economic changes.

The requirement across occupations is shown in Figure 53, illustrating the projected scale of change (expansion or reduction), the replacement demand, and the net effect of these two factors (expressed as 000 jobs). This shows that despite our remarks of caution, it is clear that replacement demand, will have a substantial effect for most occupations and industries (Figure 50) in Dorset.

These projections estimate an overall c.**26,000 new jobs** to be created in Dorset (2017-2027). However, the predicted **replacement demand** is expected to be over **132,000** (Table 21), which is **5 times the expansion demand** and means that over a third (36%) of those currently employed in Dorset (c371,000) may need to be replaced by 2027.

Moreover, and as shown in Figure 53, replacement requirements are likely to largely offset projected decline in occupations. The example below shows *elementary administration occupations*, likely to see minor decline in the long term, but rating among the top occupations in demand due to replacement requirements.

Table 20. Top 3 occupation projections in terms of expansion and replacement (Dorset) 2017-2027.

	Jobs created ▲	Jobs lost ▼
Expansion Demand (Dorset) 2017-2027	**26,608**	**14,943**
Top 3 expanding occupations		
61 Caring occupations	**6,193**	
11 Managers and directors	**3,822**	
22 Health professionals	**3,168**	
	Jobs to be replaced ▲	Net Requirement
Replacement Demand - Dorset 2017-2027	**132,000**	**143,787**
Top 5 occupations		
61 Caring occupations	**14,347**	**20,540**
92 Elementary administration and service occupations	**11,287**	**11.247**
11 Managers and directors	**10,712**	**14,534**

Replacement demand sets a unique conundrum, as requires replacement solutions for highly skilled and experienced individuals, as well as reactive fulfilment of demand in lower-skill-high-turnover vacancies, whilst maintaining the perspective of the skills required for the future. Linked to the demographic profile of Dorset, the significant replacement demand, sometimes referred to as "demographic time-bomb", is a challenge more pronounced here than elsewhere in the UK. It is unlikely to be solved by like- for-like replacement and will require creative approaches to work, up and re-skilling of the existing workforce, rethinking views on ageing in the workplace and collaborative management methodologies to ensure best utilisation of talent in Dorset.

[40] Working Futures 2017-2027 local workbooks for Dorset – Cambridge Econometrics, 2020

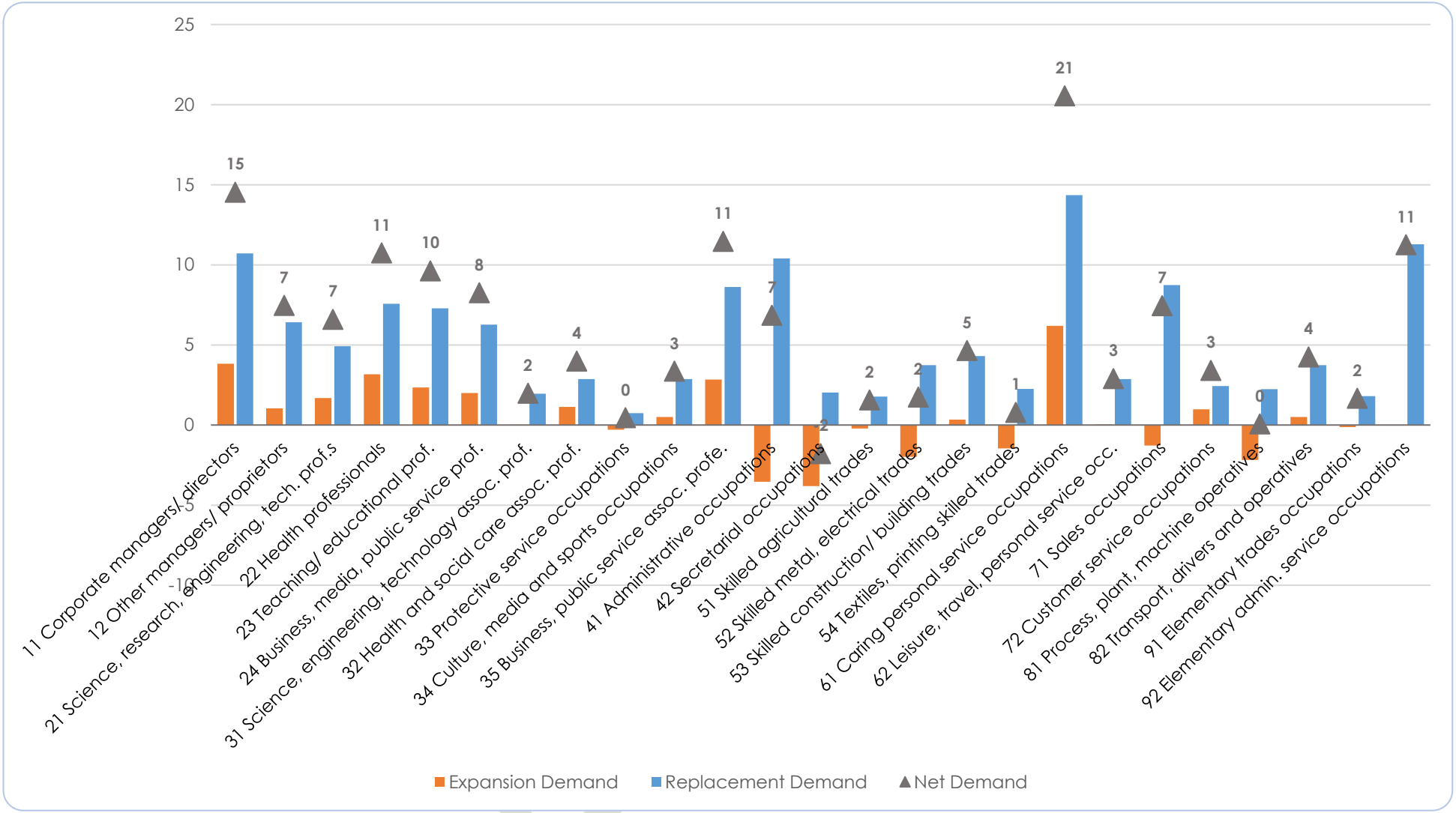


Figure 53. Expansion, replacement and net labour demand requirement by occupation – Dorset (2017-2027 – 000s). Working Futures local woksheets – Cambridge Econometrics

Table 21. Employment Change by Occupation (SOC 2010) and Replacement Demand, 2007-2027. – Dorset (2017-2027 – 000s). Working Futures local workbooks – Cambridge Econometrics

			2017-2027		*thousands*
			Change	Replacement	Net
Levels	**2017**	**2027**	Expansion/Decline	Demand	Demand
11 Corporate managers and directors	28	32	4	11	15
12 Other managers and proprietors	16	17	1	6	7
21 Science, research, engineering and technology professionals	19	20	2	5	7
22 Health professionals	19	22	3	8	11
23 Teaching and educational professionals	20	22	2	7	10
24 Business, media and public service professionals	18	20	2	6	8
31 Science, engineering, tech. associate professionals	7	7	0	2	2
32 Health and social care associate professionals	7	8	1	3	4
33 Protective service occupations	3	3	0	1	0
34 Culture, media and sports occupations	8	9	0	3	3
35 Business and public service associate professionals	26	29	3	9	11
41 Administrative occupations	31	28	-4	10	7
42 Secretarial and related occupations	8	4	-4	2	-2
51 Skilled agricultural and related trades	5	5	0	2	2
52 Skilled metal, electrical and electronic trades	15	13	-2	4	2
53 Skilled construction and building trades	14	15	0	4	5
54 Textiles, printing and other skilled trades	8	7	-1	2	1
61 Caring personal service occupations	34	40	6	14	21
62 Leisure, travel, personal service occupations	8	8	0	3	3
71 Sales occupations	28	27	-1	9	7
72 Customer service occupations	7	8	1	2	3
81 Process, plant and machine operatives	10	8	-2	2	0
82 Transport and mobile machine drivers and operatives	10	10	1	4	4
91 Elementary trades and related occupations	7	6	0	2	2
92 Elementary administration and service occupations	34	34	0	11	11
All occupations	**391**	**403**	**12**	**132**	**144**

Vacancies by Occupation: Labour Market Intelligence

To test how these occupational projections have behaved over the past year, we compare them with the actual job vacancies advertised within Dorset. As with the analysis of industries, the labour market intelligence source we use is Labour Insight by Burning Glass Technologies.

The vacancies by occupation group and sub-group, advertised throughout 2019 are illustrated with the orange bars in Figure 54 and Figure 55 with the future projections discussed earlier shown as reference markers.

Overall, of the 62,600 jobs advertised within Dorset over the year, almost a third were for professional occupations (30%) and large proportions in associate professional (16%), sales (10%) and care (10%) occupations.

The following chart compares the projected demand trends outlined in the previous section with the actual job postings by major occupation groups seen throughout 2019.

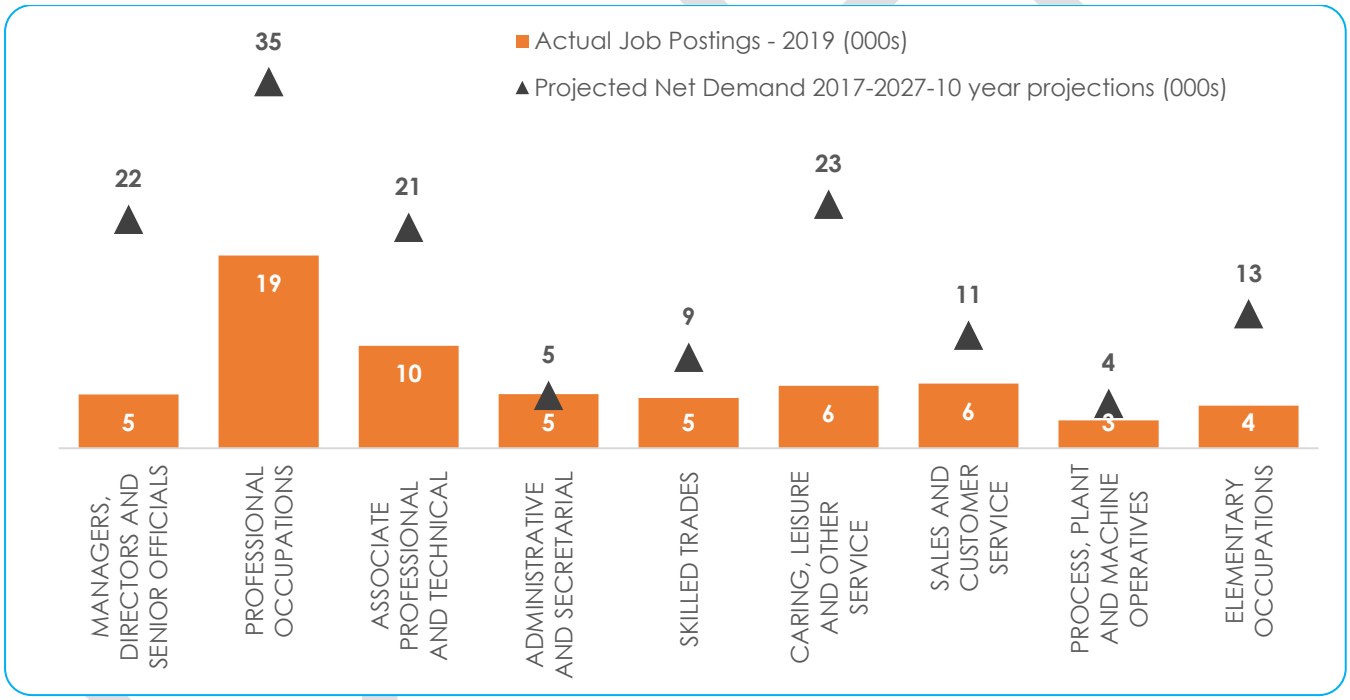


Figure 54. Demand by Major Occupation groups (SOC 2010) in Dorset - comparison between projected 10-year net demand (Working Futures 2017-2027) vs actual advertised job vacancies over 2019 (Labour Insight)

Given that we are comparing projections covering a 10-year period with a single year of market intelligence, we are mostly looking at the trend-line, and as visualised in Figure 54, the actual demand largely followed the projected trends.

For some occupation groups, the actual labour market demand seen over 2019 represented roughly *a quarter* of the projected 10-year demand, e.g. managers, caring and elementary occupations.

For others, the past year's market demand equalled *over a half* of the projected 10-year demand, e.g. professional, associate professional, skilled trades and sales occupations.

Interestingly, for the group of administrative and plant/ machine operatives, *the actual demand reached the 10-year projected net demand over a single year*, suggesting the projections of decline in these occupations could be overestimated.

Similarly, at more granular occupational sub-group level (Figure 55) the projected 10-year demand has been met or exceeded over a single year in certain occupations as evidenced by actual vacancies advertised. Most notably, the demand appeared higher than projected for science, research and technical professional and associate professional occupations, as well as secretarial and some skilled trade occupations.

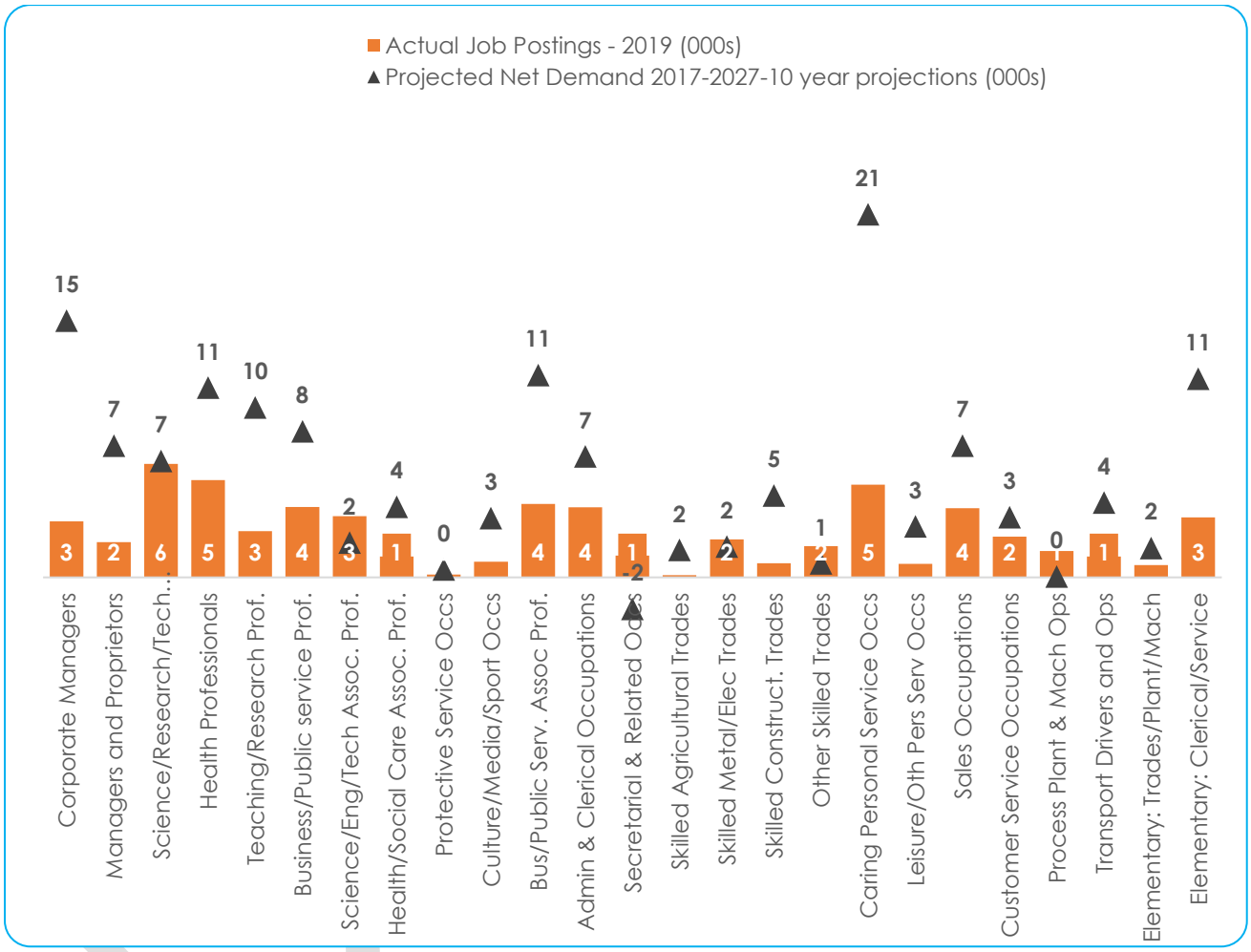


Figure 55. Demand by occupation (SOC 2010) Dorset - comparison between projected 10-year net demand (Working Futures 2017-2027) vs actual advertised vacancies over 2019 (Labour Insight)

As stated earlier, these projections should be used as guidance for longer-term planning purposes rather than exact numbers, while the vacancy information gives an immediate snapshot of the current market and allows exploring further trends of employer demand.

The following section shows the numbers and types of advertised jobs in the broad occupational groups. For example, exploring the Managers and Directors Occupational group (Figure 56) there were 5,143 jobs advertised, and among these c800 were for Marketing and Sales. For each chart, the far-left (green) bar represents the total number of advertised jobs in that occupational group, with the following bars then showing the most prevalent specific job roles. We also illustrate the level of education where requested, salaries and sectors recruiting for these specialisms.

Managers, Directors and Senior Officials

A large variety of sectors were recruiting managers in Dorset with over 5k jobs advertised ranging from marketing and sales, through health, production and restaurant managers.

Over 60% of the jobs requested bachelor's degrees. Advertised salaries for jobs requiring bachelor degrees were c18k higher than those requiring L2 GCSEs. Just over a third of vacancies requested 3-5 years and a quarter – 9+ years of experience.

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▲	22	5	£40,000	£37,000	• Finance • Accommodation & Food

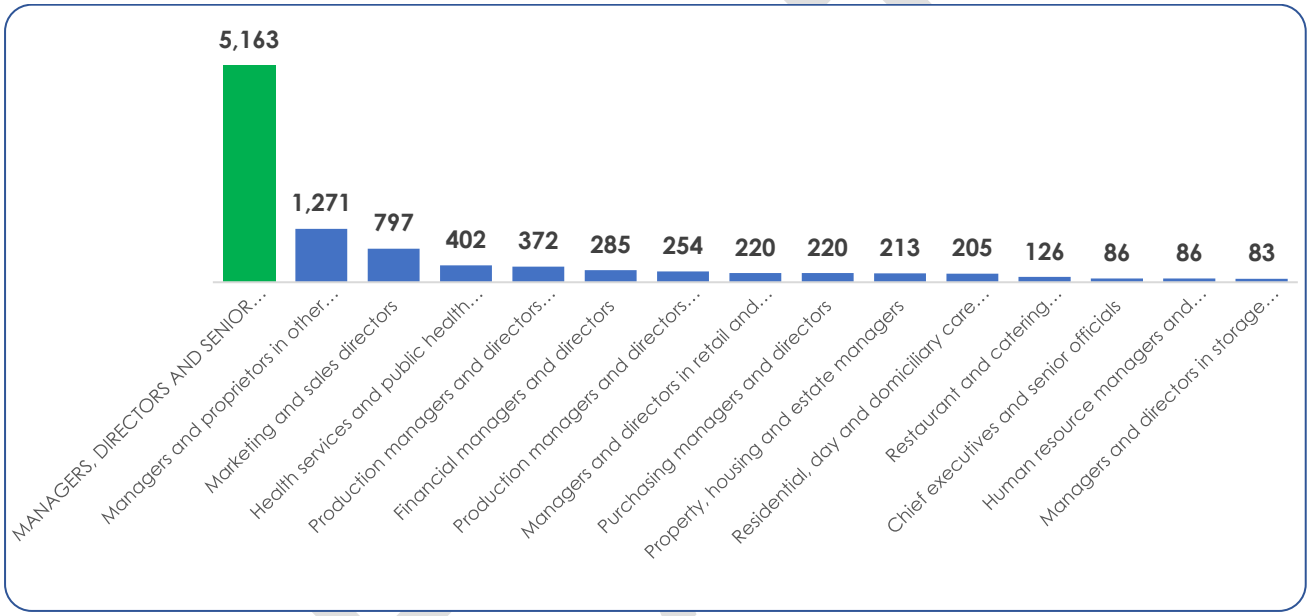


Figure 56. Number of advertised Management and Director vacancies and top job areas (DLEP - year 2019). Labour Insight – Burning Glass

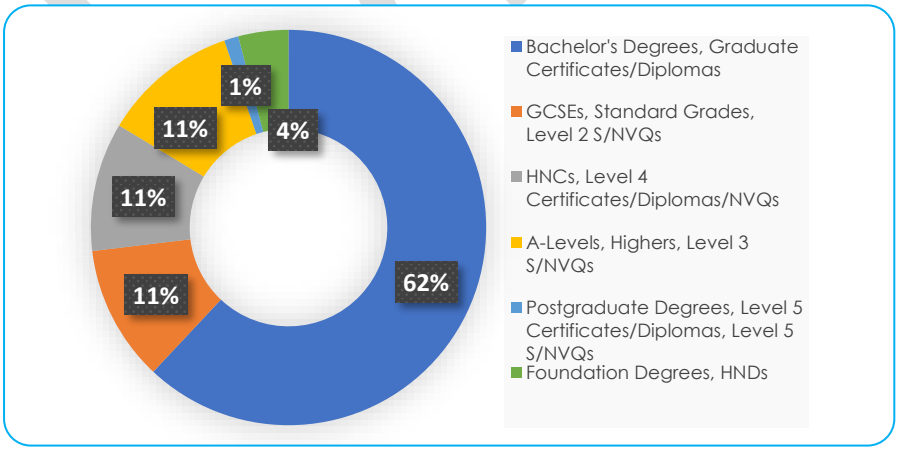


Figure 57. Management and Director **vacancies – required qualifications** (DLEP - year 2019). Labour Insight

Professional Occupations

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▲	35	19	£40,800	£36,600	• Public Admin, Health, Education • Finance • Transport, Communication

As seen in

Figure 58, professional occupations are by far the largest and most diverse occupational group in terms of advertised vacancies. We have therefore explored key occupational families within the wider professional occupations group: Healthcare, Information Technology, Engineering and Education.

Figure 58. Professional Occupations vacancies and top job areas (DLEP - year 2019). Labour Insight

Professional Occupations: Healthcare

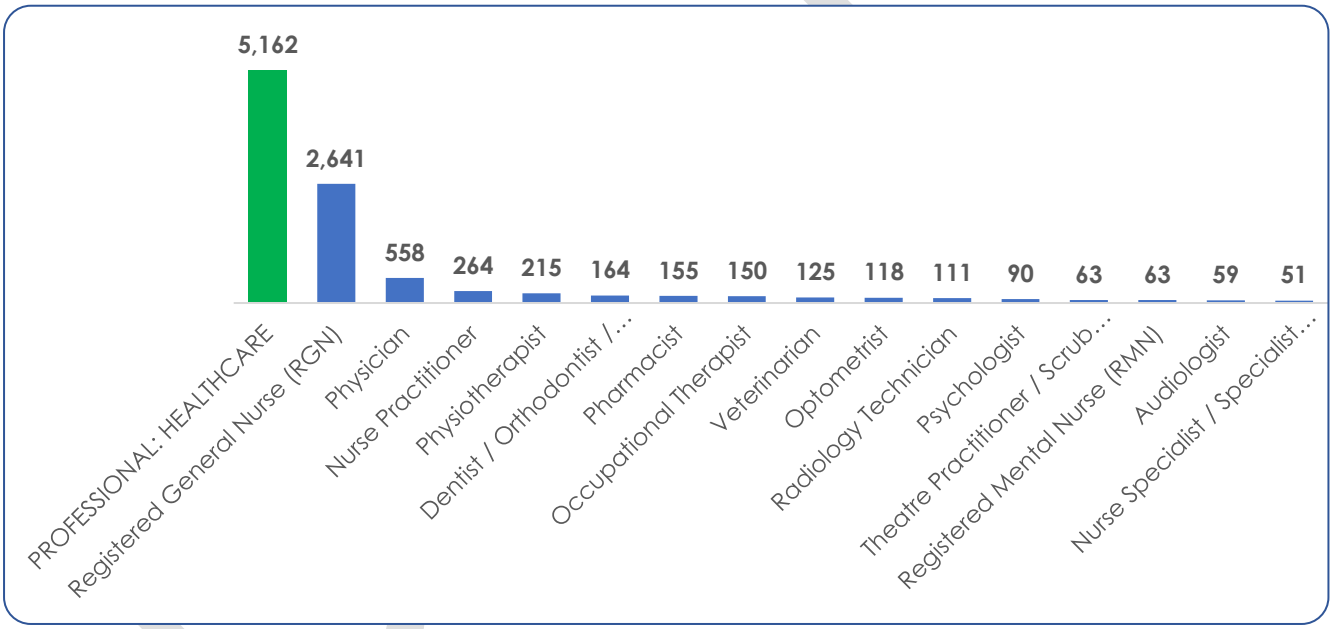
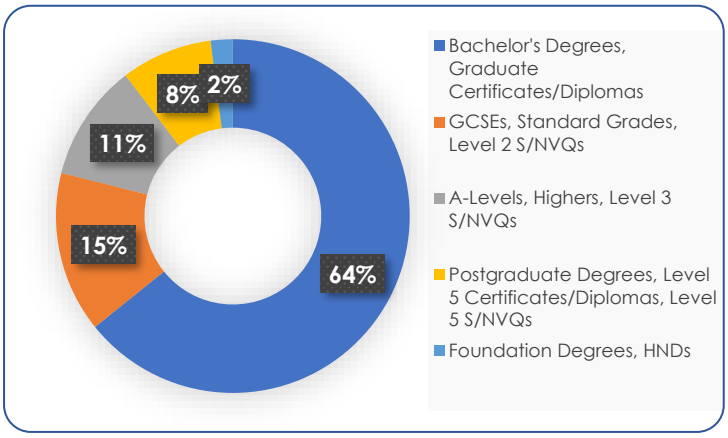


Figure 59. Professional: Healthcare vacancies and top job areas (DLEP - year 2019). Labour Insight



Over a quarter (c5,200, 28%) of the Professional occupation vacancies advertised over 2019 were in the Healthcare family, and over half of them were for registered general nurses.

The mean advertised salary was £39,000 and the median was £35,000. 64% of the jobs required bachelor's degree level qualifications and further 8% - Postgraduate Degrees.

Figure 60. Professional: Healthcare vacancies – required qualifications (DLEP - year 2019). Labour Insight

Professional Occupations: Information Technology

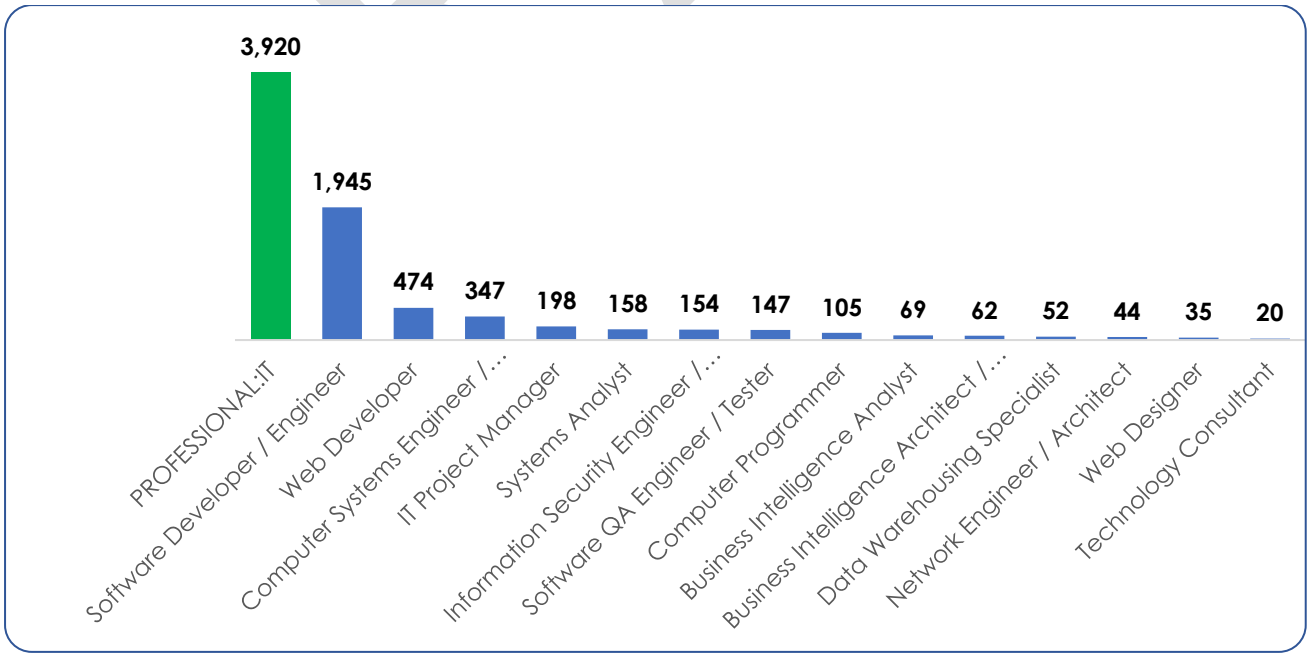


Figure 61 Professional: IT vacancies and top job areas (DLEP - year 2019). Labour Insight

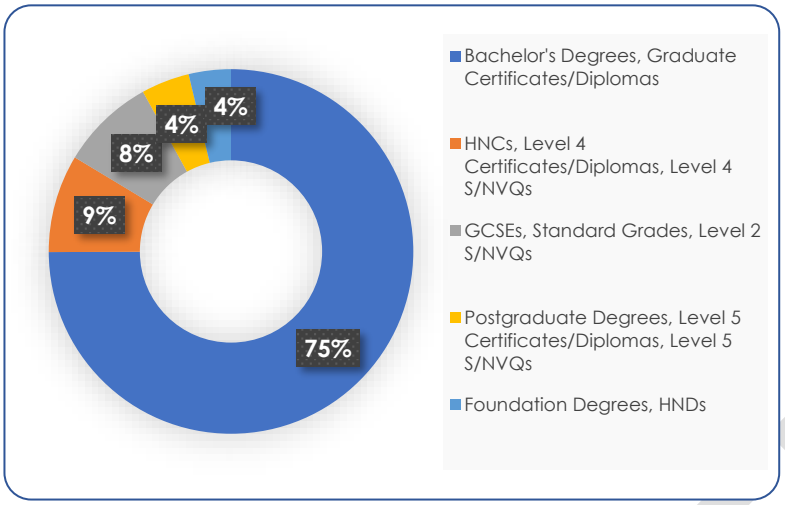


Figure 62. Professional: IT vacancies – required qualifications

A fifth (21%) of the Professional occupation vacancies in 2019 were for IT professionals, and half of them for software developers/ engineers specifically.

The mean advertised salary was £45,000 and median was £40,000.

Almost 90% of jobs expected minimum education of Level 4 and above (75% required Bachelor's and 4% - Postgraduate Degrees).

Over half required 3+ years of experience.

Top employers: JP Morgan, NHS, BAE Systems, Vitality, Exposed Solutions & Bournemouth University.

Professional Occupations: Engineering

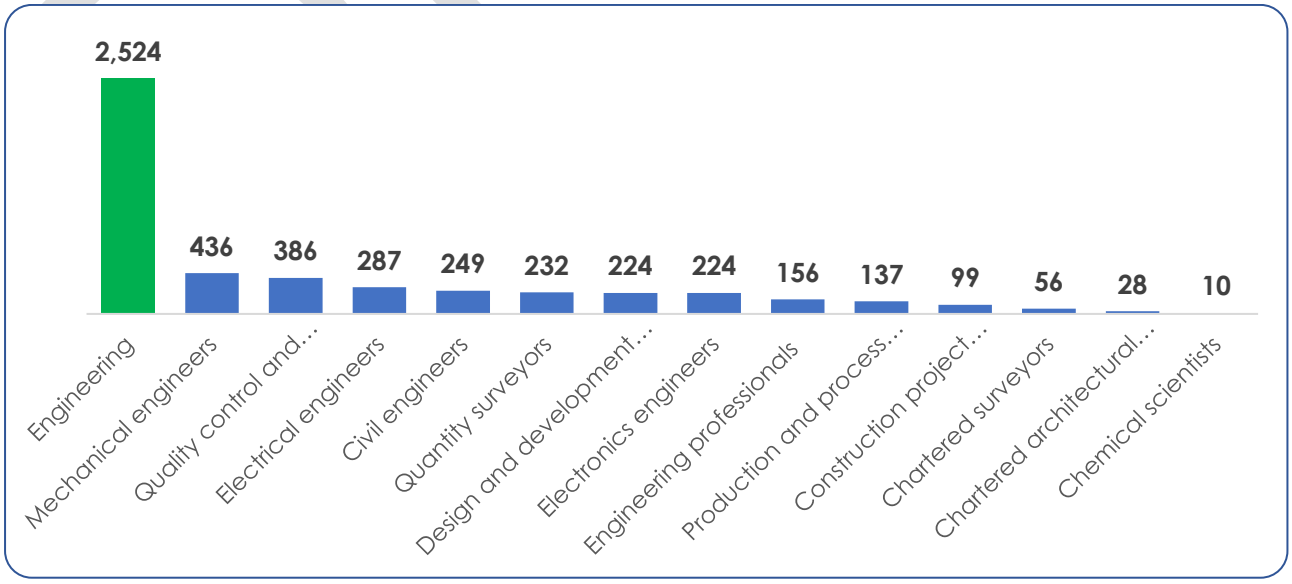


Figure 63. Professional: Engineering vacancies and top job areas (DLEP - year 2019). Labour Insight

Over 2,500 (14%) of the Professional vacancies advertised over 2019 were in a range of Engineering occupations.

The mean advertised salary was £40,700 and median was £36,500. 80% of jobs expected minimum education of Level 4 and above (58% of the jobs required Bachelor's Degrees) and over two thirds required 3+ years of experience.

Top employers: Cobham, Halt Engineering, BAE Systems, Round Peg solutions, Siemens, Curtis Wright.

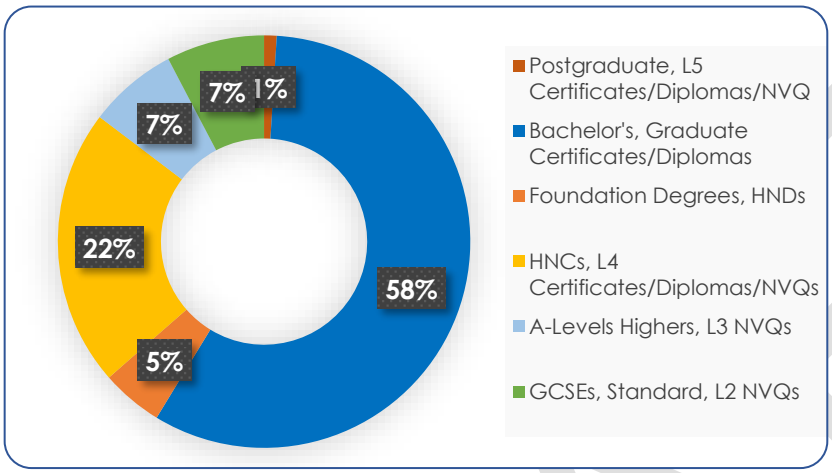


Figure 64. Professional: Engineering vacancies – required qualifications (DLEP - year 2019). Labour Insight

Professional Occupations: Education

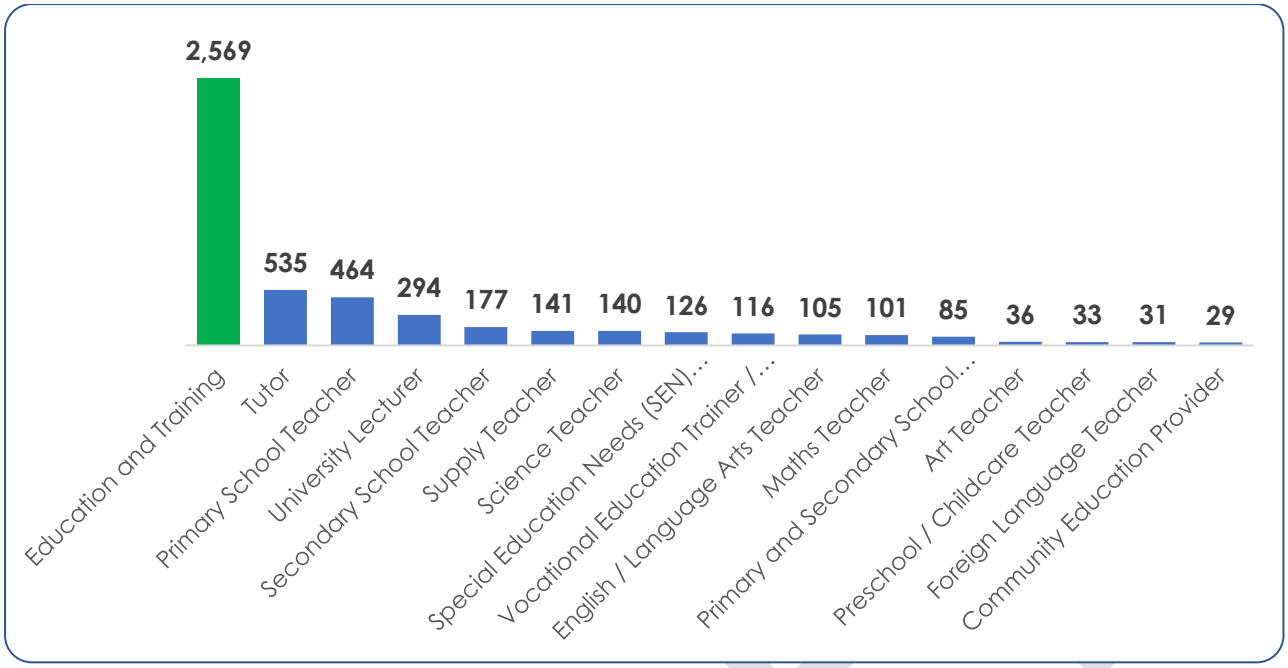


Figure 65. Professional: Education vacancies and top job areas (DLEP - year 2019). Labour Insight – Burning Glass

The final professional occupation group we are looking at with a substantial number (over 2,500) job postings throughout 2019 is Education and Training.

Almost half of the jobs required GCSE Standard and over a third bachelor's degrees. The mean advertised salary was £35,600 and median was £32,600.

The advertised average salary for jobs requiring bachelor's degree was c39k or 4k higher than for jobs requiring Standard GCSEs.

Top employers: Spires (tutoring), Bournemouth University, BCP Council.

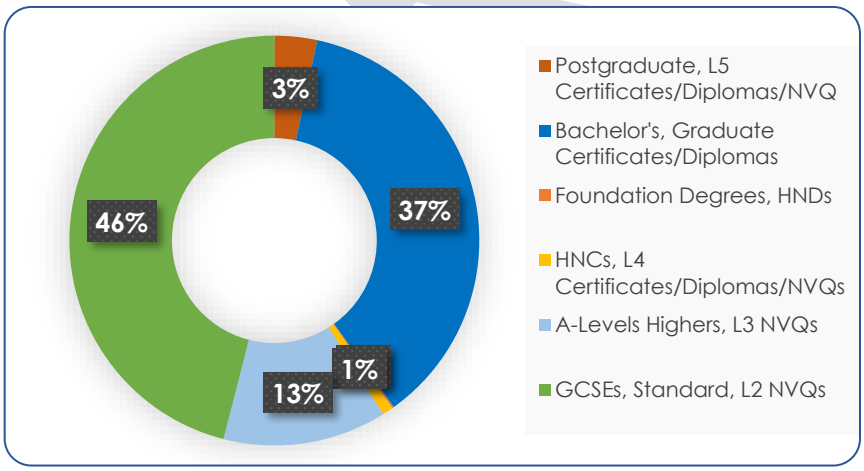


Figure 66. Professional: Education vacancies – required qualifications (DLEP - year 2019). Labour Insight

Associate Professional and Technical Occupations

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▲	21	10	30,000	£27,000	- Public Admin, Health, Education - Finance

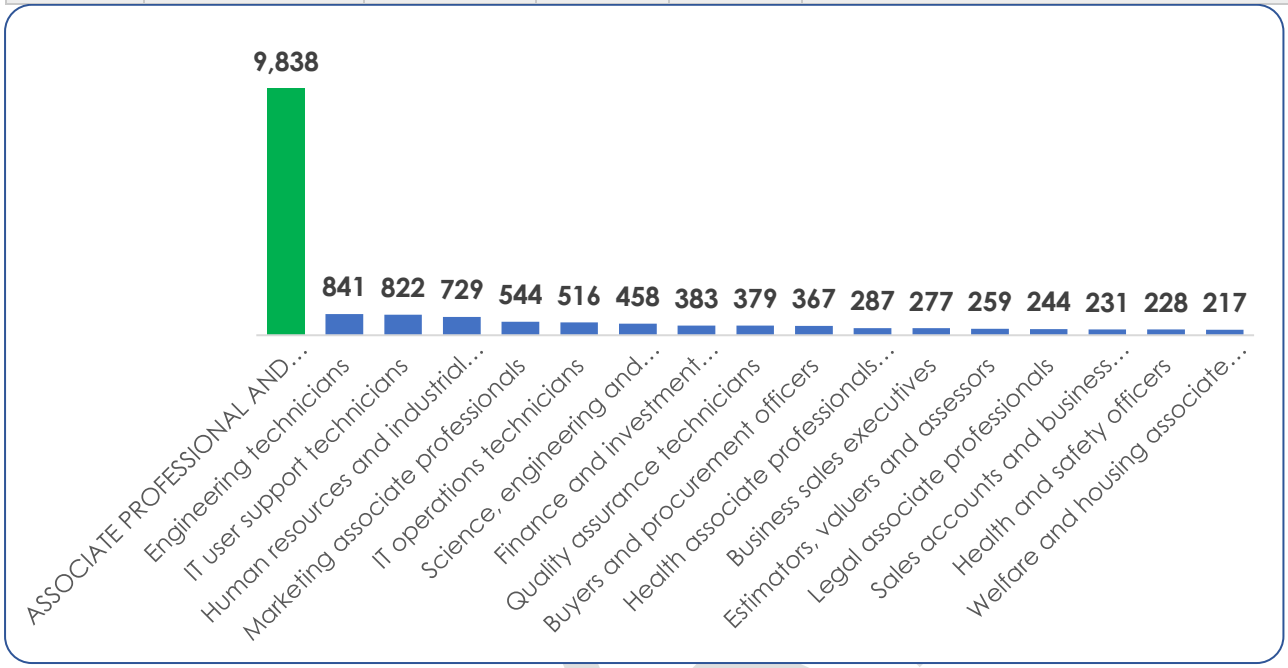
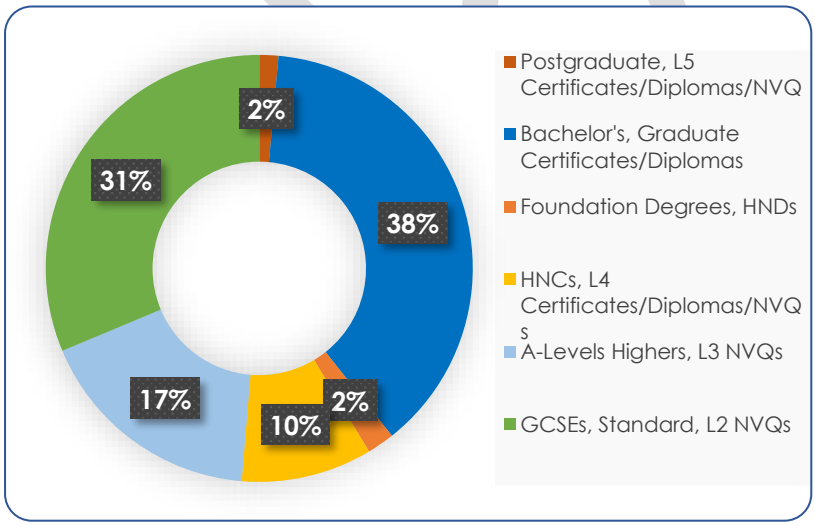


Figure 67. Associate Professional & Tech vacancies and top job areas (DLEP - year 2019). Labour Insight

With almost 10k advertised vacancies, associate professional and technical occupations were the second largest occupational group in demand in 2019 (16% of all vacancies).



Associate Professionals were in demand in a range of specialisms (Figure 67) and industries including Healthcare, Science and Technology, Manufacturing, Retail. Half of the jobs (49%) minimum education requirements were GCSEs Standard and A Levels and over a third – bachelor's degrees. Salaries for jobs requiring bachelor's degrees were £10k higher (c£34k) on average compared to those requiring GCSE level education (c£24k).

Figure 68. Associate Professional & Technical vacancies –qualifications (DLEP - 2019). Labour Insight

Half of the jobs required little or no previous experience (0-2 years) and the other half required 3+ years of experience. Top public sector employers: National Health Service, BCP Council, Bournemouth University; private sector employers: JP Morgan, Bidvine, Cobham and Halt Engineering.

Caring, Leisure and Other Services Occupations

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▲	23	6	19,500	£21,500	• Health, Residential care

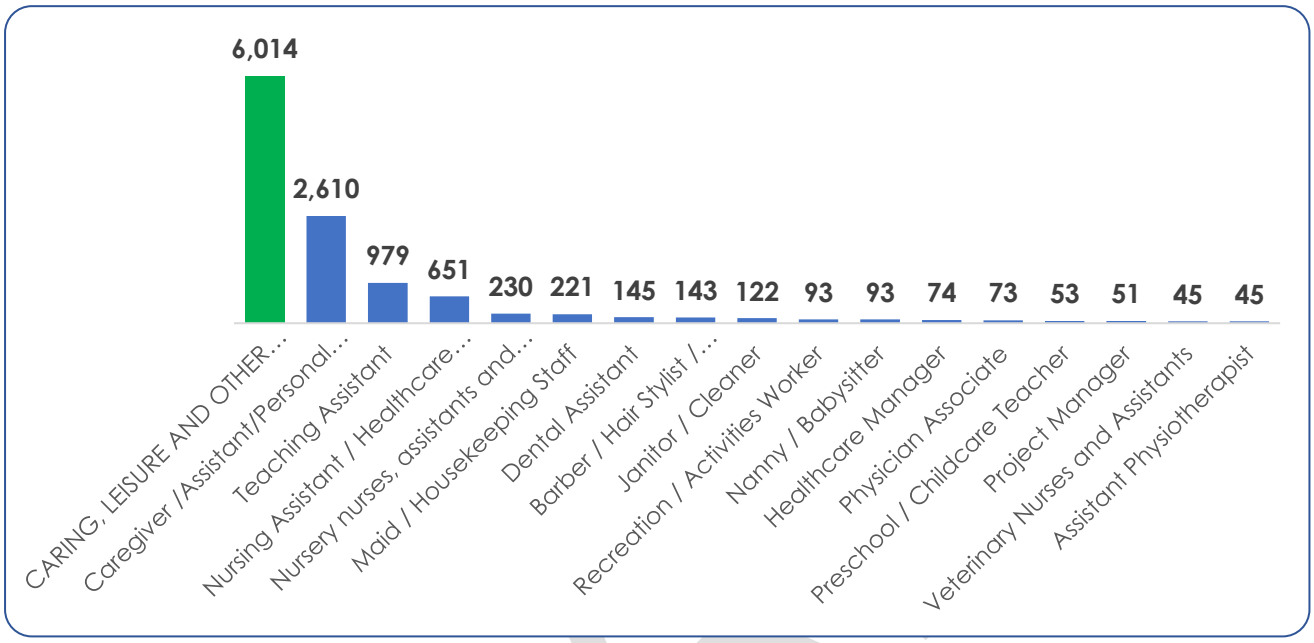
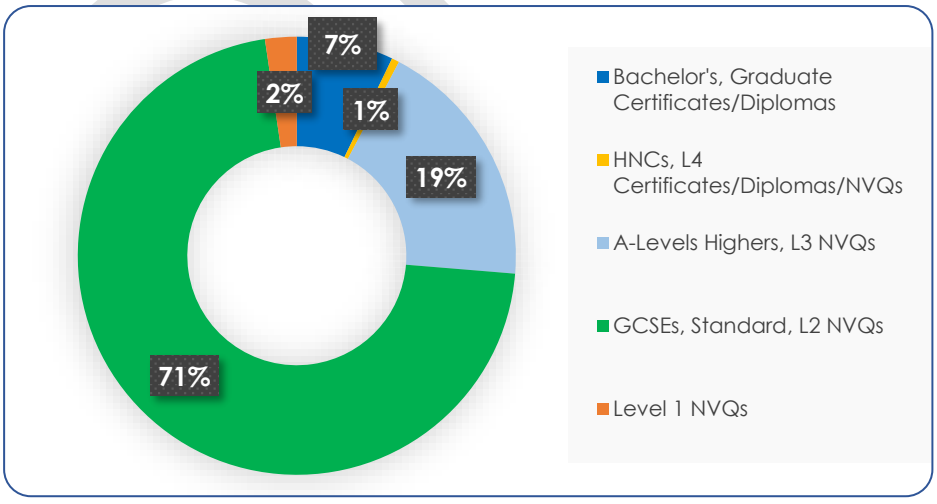


Figure 69. Caring, Leisure & Other vacancies and top job areas (DLEP - year 2019). Labour Insight

Significant occupational group in terms of labour demand with 6k (10% of all vacancies) advertised vacancies in 2019, (43%+ for Caregivers) and expected to increase even further.
The sectors recruiting mostly related to human health, social and residential care.
Over 70 per cent of the jobs required little or no previous experience.
Overall minimum education requested for this group is lower with over 70 percent of jobs requesting GCSE standard. This is also reflected in lower salaries.



Over a third of the jobs containing salary information were within the 15k-19k bracket and jobs requesting GCSE Standard had an average advertised salary of 21k while those requesting bachelor's degrees were 4k higher.

Figure 70. Caring, Leisure & Other Service vacancies – required qualifications (DLEP - year 2019). Labour Insight

Major recruiters were the National Health Service. Agincare group, BCP Council and Care South.

Sales and Customer Service Occupations

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
—	11	6	£24,500	£20,500	• Accommodation & Food • Finance

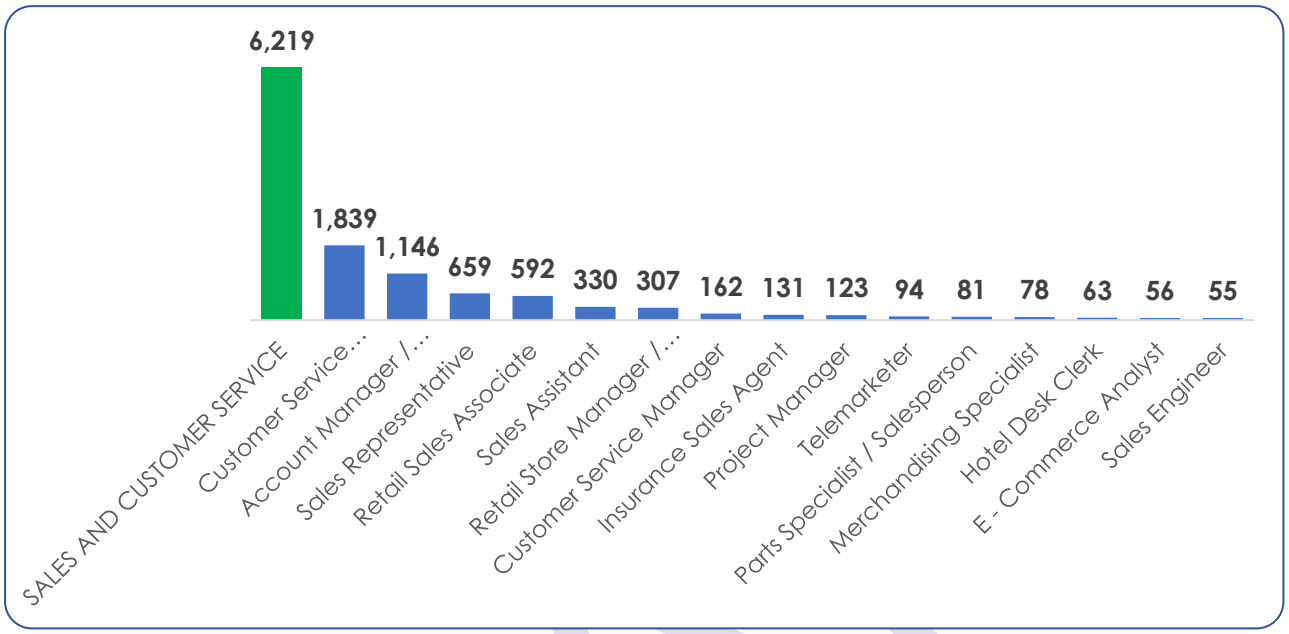


Figure 71. Sales & Customer Service vacancies and top job areas (DLEP - year 2019). Labour Insight

With over 6k advertised vacancies, Sales & Customer Service occupations were the third largest occupational groups in terms of labour demand in 2019 (10% of all vacancies).

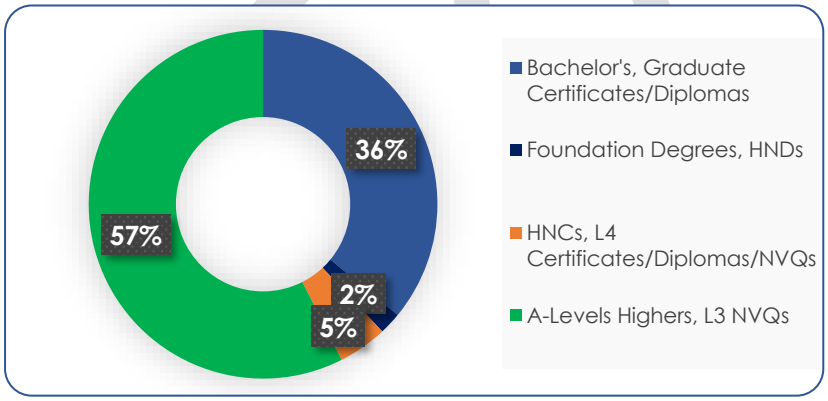


Figure 72. Sales & Customer Service – required qualifications (DLEP - year 2019). Labour Insight

Industries recruiting sales professionals included Retail, Business, Banking and Management Consulting and Human Health.

Minimum education requested for over half of the jobs (57%) were A Levels and for over a third – bachelor's degrees.

The advertised salaries for jobs requiring bachelor's degrees were £9k higher (c£30k) on average compared to those requiring GCSE level education (c£21k).
Half of the jobs required little or no previous experience (0-2 years) and the other half required 3+ years of experience.
Top recruiters were major retailers Tesco, Co-operative, Dixons Carphone, B&Q and Lidl, online retailer Fresh Group and interestingly the second largest recruiter of sales professionals after Tesco was the National Health Service.

Skilled Trades Occupations

Growing	Net Demand 2017-27 (000)	Vacancies 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▼	9	5	£28,800	£28,000	• Construction • Accommodation & Food • Finance

Between January and December 2019 there were **4,836** advertised vacancies in Dorset (8% of all vacancies) within the Skilled Trades.

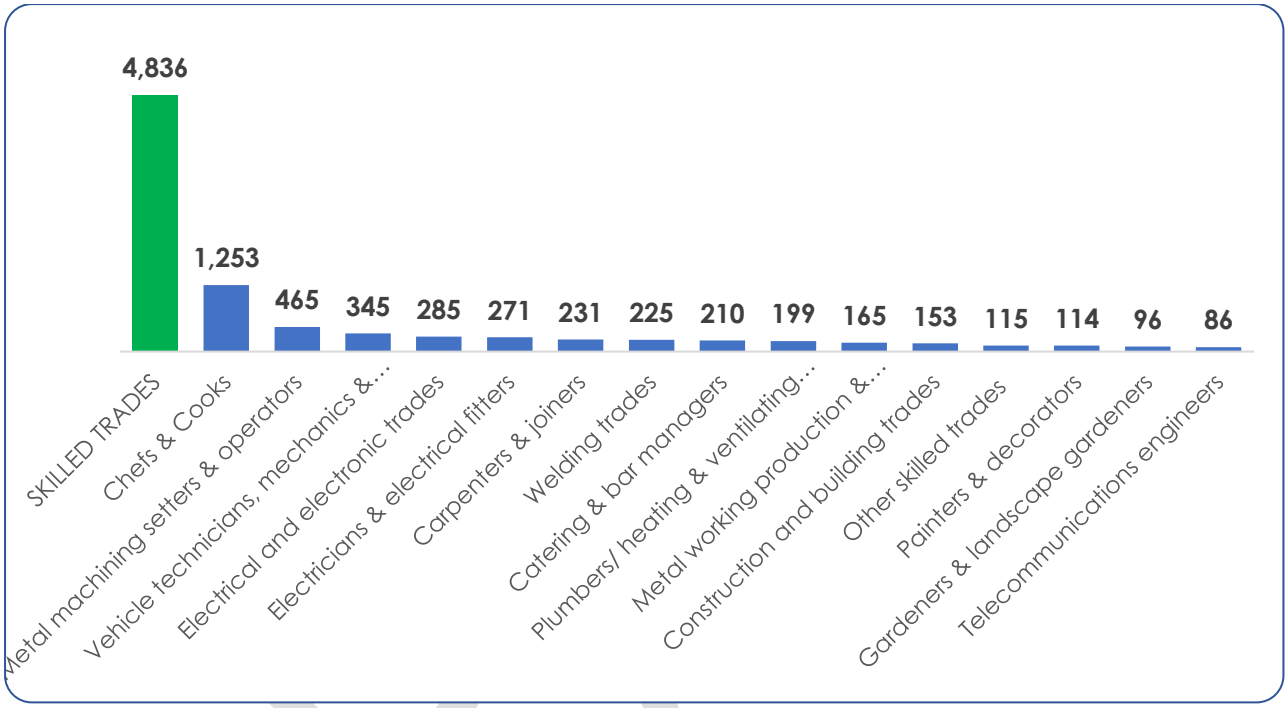
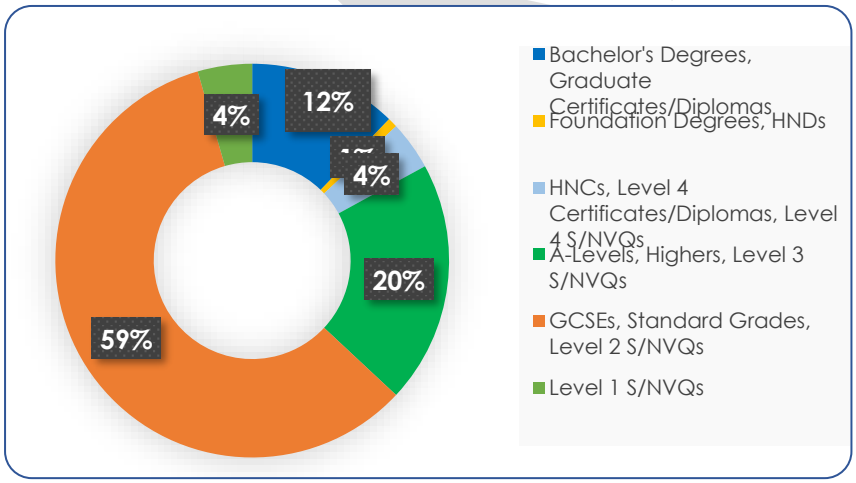


Figure 73. Skilled trades vacancies and top job areas (DLEP - year 2019). Labour Insight



Minimum education requested for just under 60% of advertised jobs was GCSE Standard, a further 20% required A levels and 12% - Bachelor's degrees.

The advertised salary for jobs requiring bachelor's degrees was 37k - almost 10k higher than for jobs requiring GCSE Standard.

Figure 74. Skilled Trades – required qualifications (DLEP - year 2019). Labour Insight

Major employers were recruitment experts, such as Holt Engineering, PM Resources and food sector employers such as Loungers and Compass Group.

Administrative and Secretarial Occupations

Growing	Net Demand 2017-27 (000)	Demand 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▼	5	5	£22,200	£20,500	- Public Admin, Health, Education - Finance

There were **5,194** Administrative and Secretarial vacancies advertised within Dorset LEP between January and December 2019 (8% of all vacancies), including occupations such as administrative clerks, office administrators, book-keepers and payroll managers.

- Minimum education requested for over 60% of the advertised jobs was GCSE Standard and for one fifth – bachelor's degrees.
- The mean advertised salary for jobs requiring bachelor's degrees was 26.5k which was 7k higher than for those jobs requiring GCSE Standard.
- The major employers recruiting for these occupations were in the public sector – mainly within Health and Education – the National Health Service, BCP Council, Bournemouth University and Royal Mail.

Elementary Occupations

Growing	Net Demand 2017-27 (000)	Demand 2019 (000)	Advertised Salary Mean/Median		Key to Industries
—	13	4	£20,100	£18,700	• Accommodation & Food • Finance

Between January and December 2019, about 7 per cent (n=4,090) of the vacancies advertised in Dorset LEP were in Elementary occupations, such as kitchen and catering assistants, waiters, guards, cleaners and domestics.

- The mean advertised salary was 20k and median was 19k.
- Minimum education requested for over 60% of the advertised jobs was GCSE Standard and for one fifth – bachelor's degrees.
- The major employers recruiting for these occupations were in tourism, food and hospitality –Britannia Hotels, Wetherspoon, Whitbread, Bourne Leisure as well as in the National Health Service.

Process, Plant and Machine Operatives

Growing	Net Demand 2017-27 (000)	Demand 2019 (000)	Advertised Salary Mean/Median		Key to Industries
▼	4	3	£26,500	£25,000	- Manufacturing - Transport/ Communication - Construction

There were **2,671** advertised Process, Plant and Machine Operatives vacancies within Dorset LEP between January and December 2019 (4% of all vacancies), including occupations such as metal working machine and construction operatives, assemblers and machine vehicle drivers.

- The mean advertised salary was 26k and median was 25k.
- The majority of jobs where minimum education was requested, it was GCSE Standard.
- The employers recruiting for these occupations were mainly within manufacturing, engineering, construction and transport – Holt Engineering, Curtis Wright, Team Incorporated, My four wheels, Yodel.

STEM (Science, Technology, Engineering and Maths) Occupations

STEM jobs do not fall within a single standard occupation group or industry. They are an area of specific interest due to their role in driving and maintaining technological innovation across sectors, becoming even more essential in the current climate.

Over the course of 2019, there was STEM demand across a wide range of employers across industries in Dorset, the top recruiters being the National Health Service, J.P. Morgan, Cobham, HOLT engineering, Bournemouth University and BAE Systems.

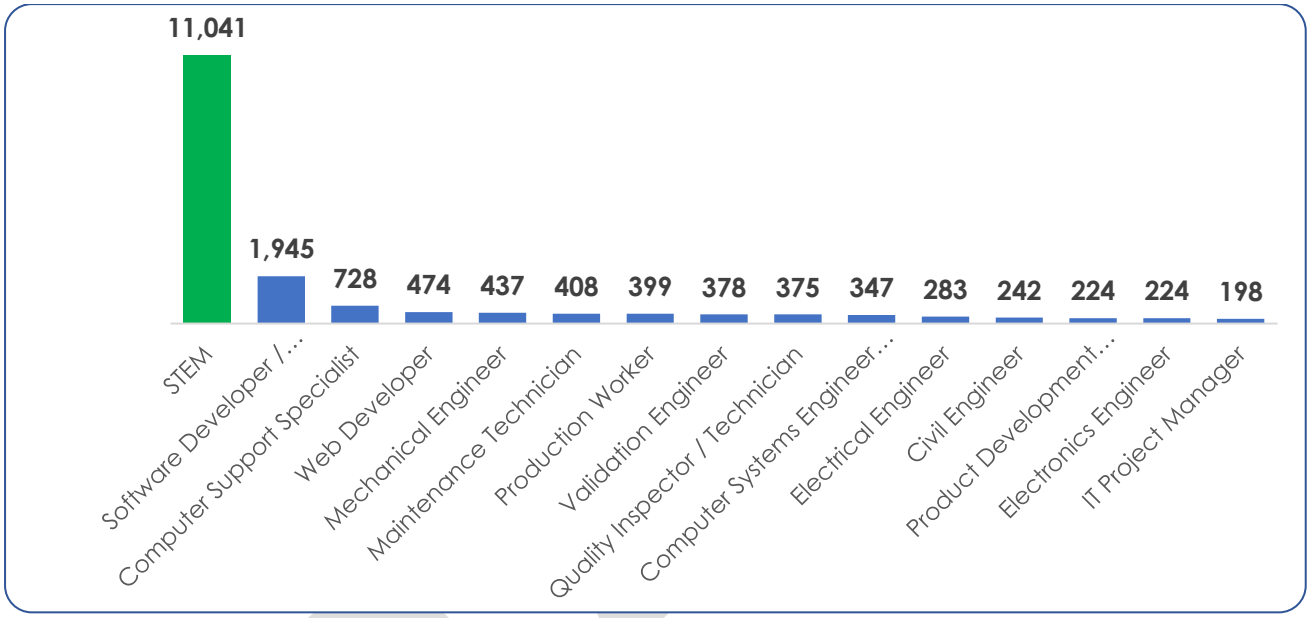


Figure 75. STEM vacancies and top job areas (DLEP - year 2019). Labour Insight

There were 11,041, c30 %of all Dorset vacancies advertised throughout 2019 requiring STEM occupations, which is comparable to the proportion nationally and making them the second most significant group of occupations in demand within Dorset LEP area after Healthcare.

Within the group of STEM vacancies, the highest demand was for software developers/ engineers (c. 2000) representing a higher proportion of STEM vacancies in Dorset LEP than seen nationally (19% compared to 16% in the UK).

Latest 2020 year to date data shows that Software Developer/ Engineer was the third most sought after occupation in Dorset, after Registered Nurses and Caregivers – the latter being essential workers where the demand is maintained in response to the pandemic.

Over 70% of jobs where minimum education was recorded, it was at Graduate and Postgraduate level. The mean advertised salary was 38k and median was 34k. Mean salary advertised where Postgraduate degrees were requested was 10K higher than for jobs requesting A levels, but it has to be noted that this is based on small proportion of postings specifying minimum education.

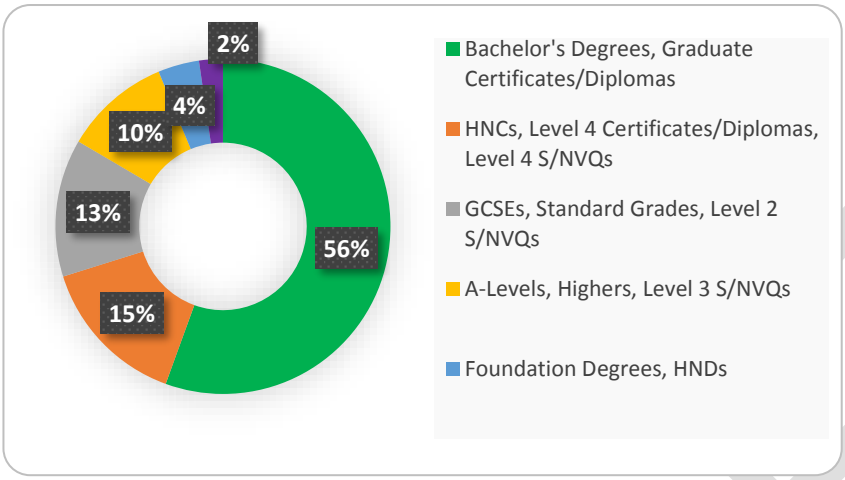


Figure 76. STEM vacancies – required qualifications (DLEP - year 2019). Labour Insight

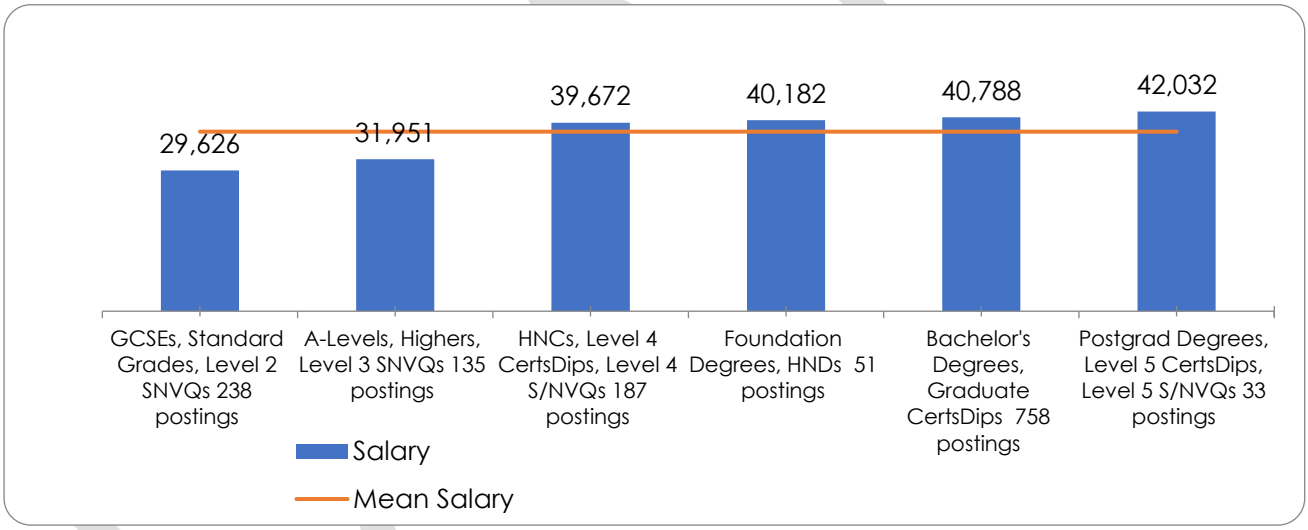


Figure 77. STEM vacancies – salary by education (DLEP - year 2019). Labour Insight

Top Job Roles in Demand

Finally, looking at 2019 and the top jobs in demand within occupational subgroups across Dorset, this section adds further granularity and localisation of demand. At the end of this section we also list some new and emerging job roles that are expected to become more important in the future. Unsurprisingly the single job with largest demand in Dorset was nurses – 5% of all advertised jobs over that period. This was followed by care workers and sales roles and as already seen, a relatively large demand for software development professionals – 3% of jobs.The skills required for these occupations are discussed in the following section and detailed in Table 25.

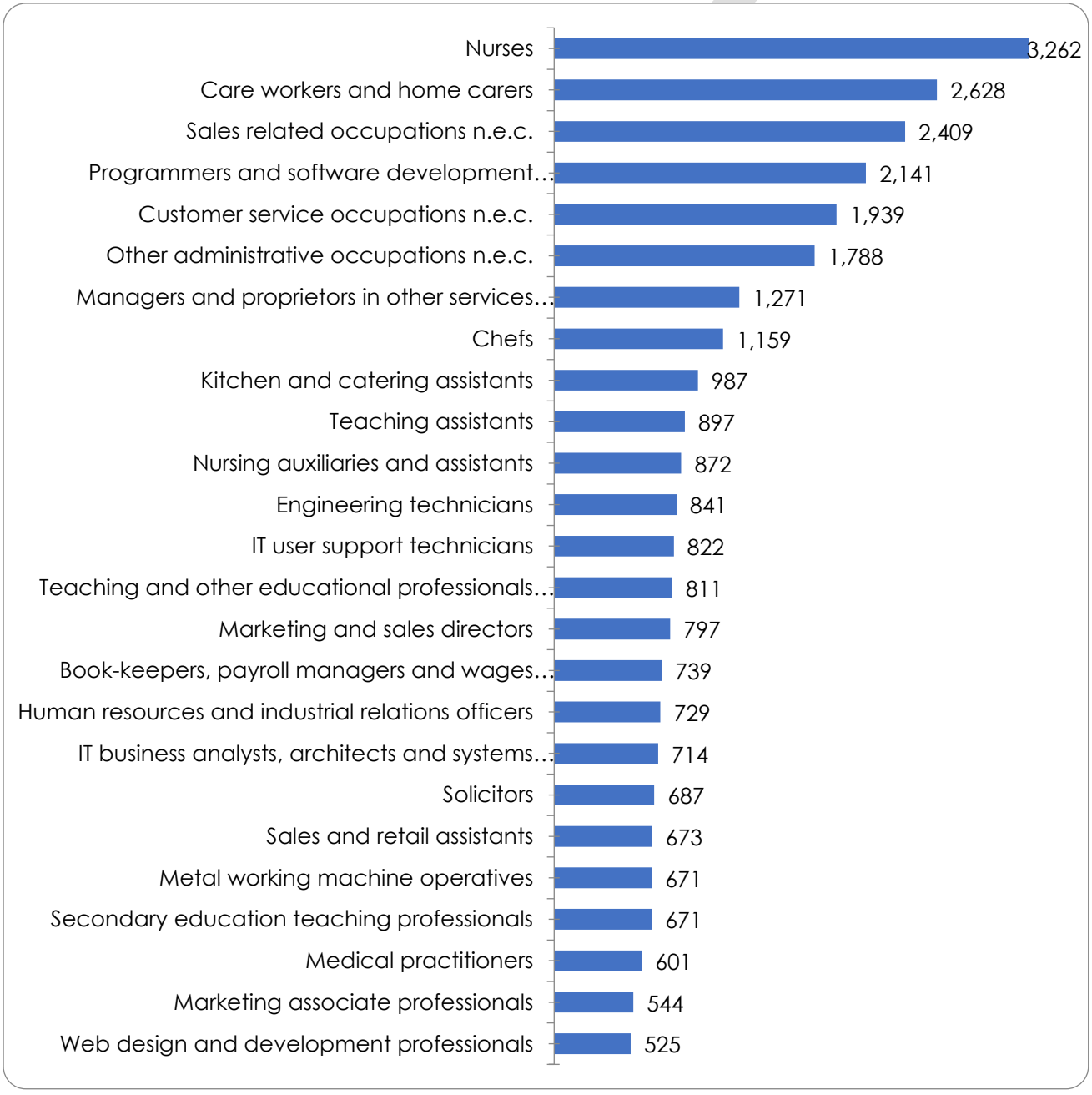


Figure 78. Proportion of advertised jobs in DLEP area by occupation (2019). Labour Insight – Burning Glass

The number and types of jobs advertised for Bournemouth, Poole and Dorset (including Christchurch) are set out separately in the below charts by occupations, industries and employers, illustrating some differences in labour demand for the areas.

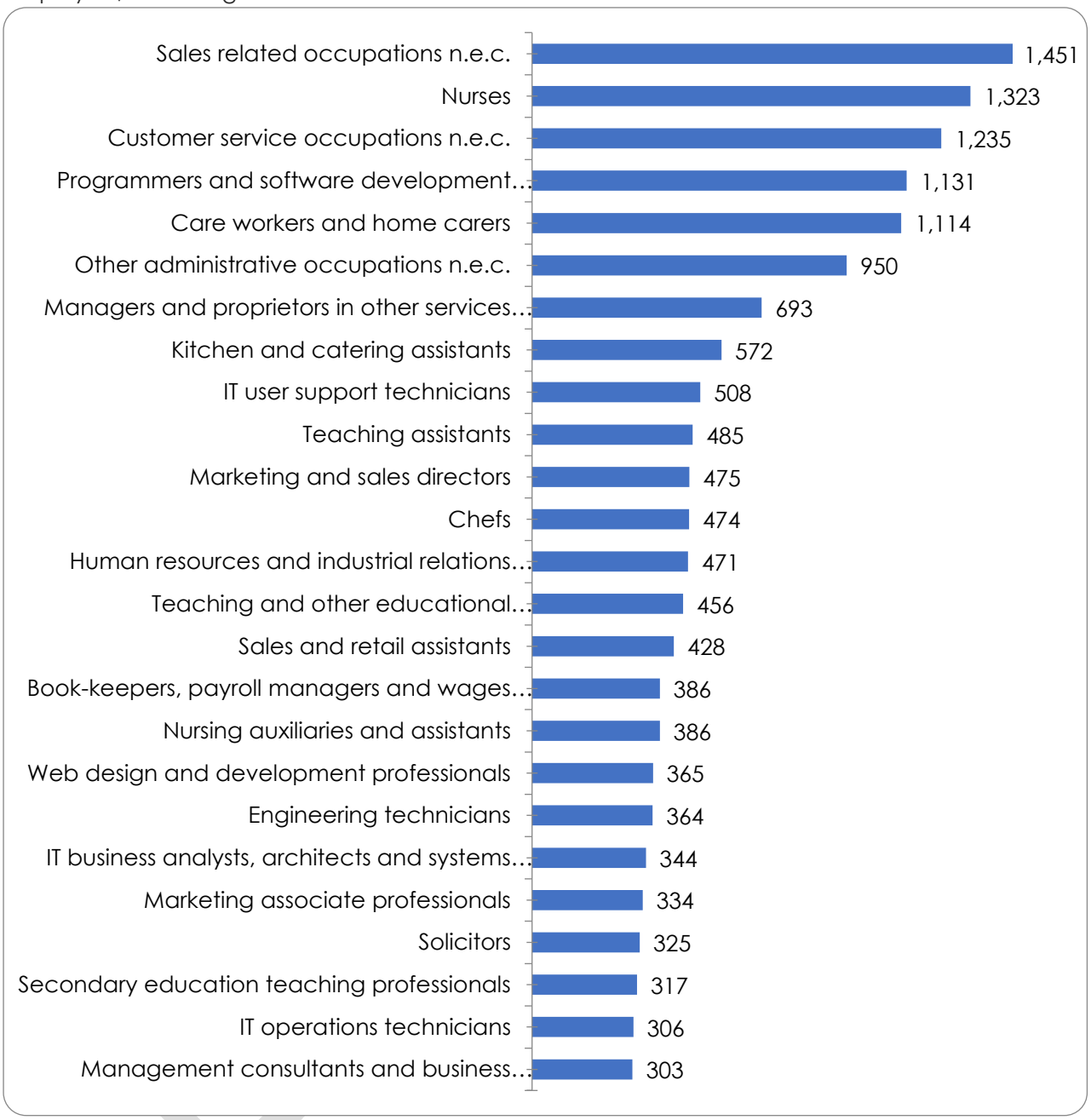


Figure 79. Number of advertised jobs in Bournemouth and Poole by occupation (2019). Labour Insight

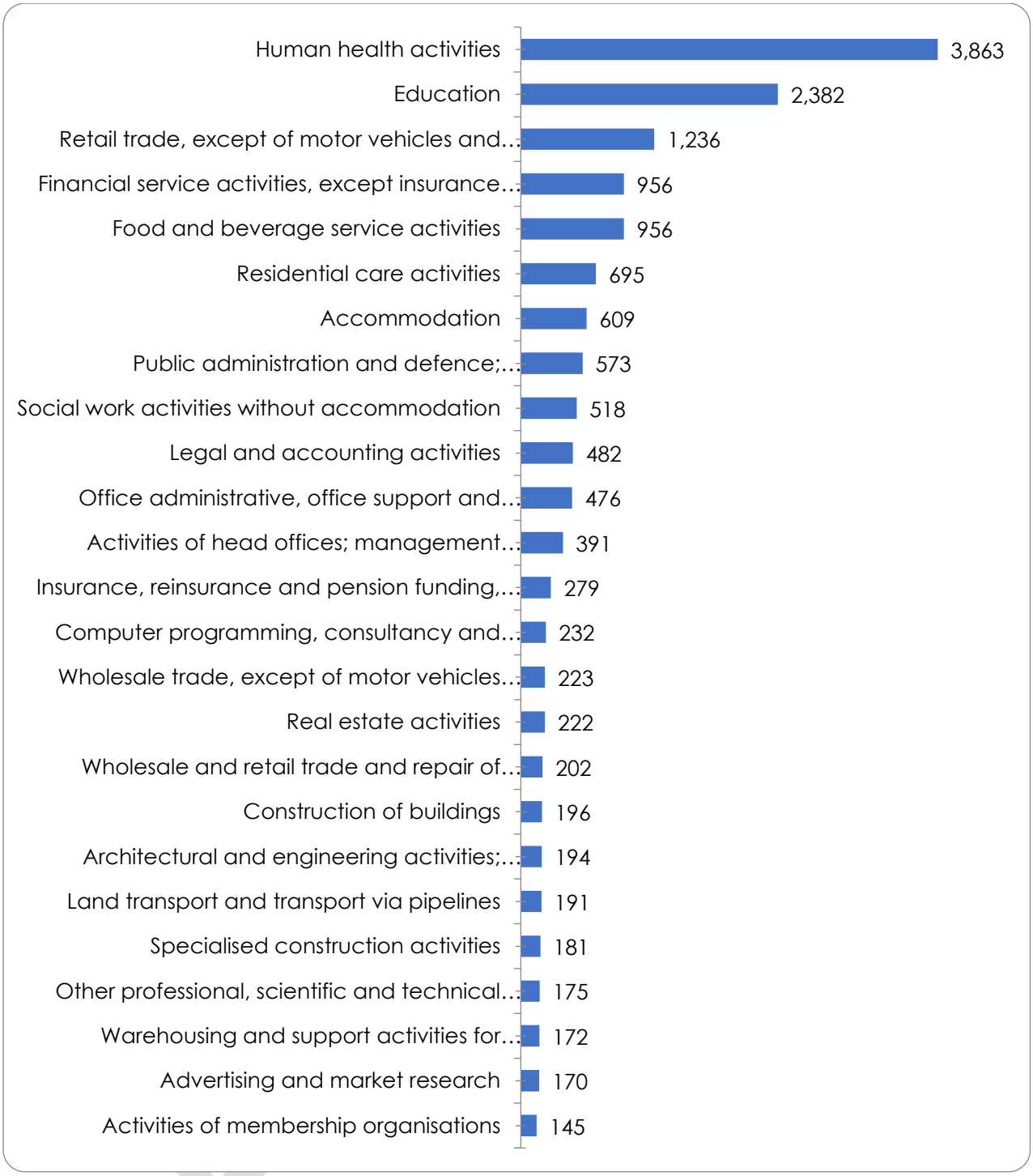


Figure 80. Number of advertised jobs in Bournemouth and Poole by industry (2019). Labour Insight

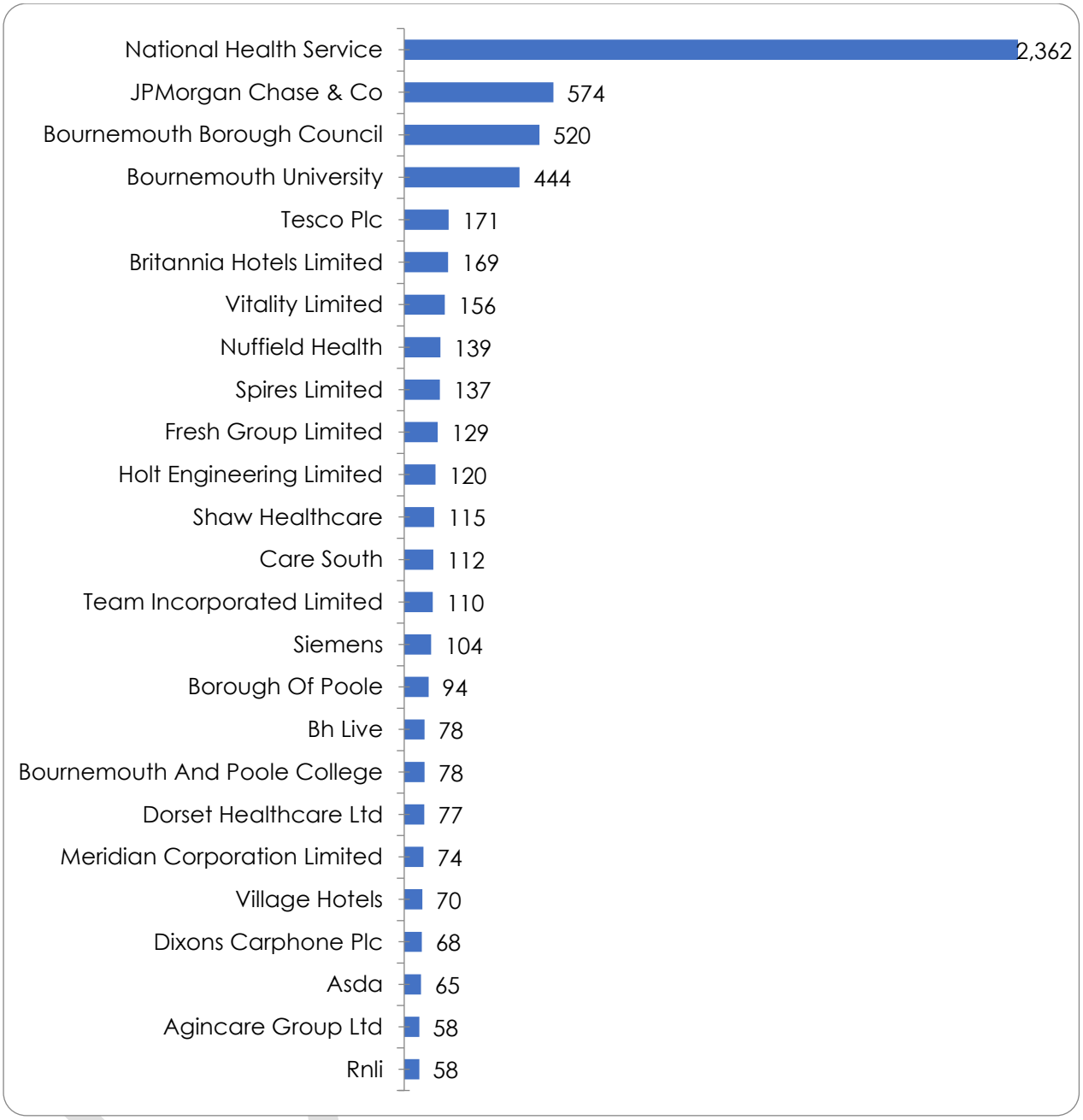


Figure 81. Number of advertised jobs in Bournemouth and Poole by employer (2019). Labour Insight

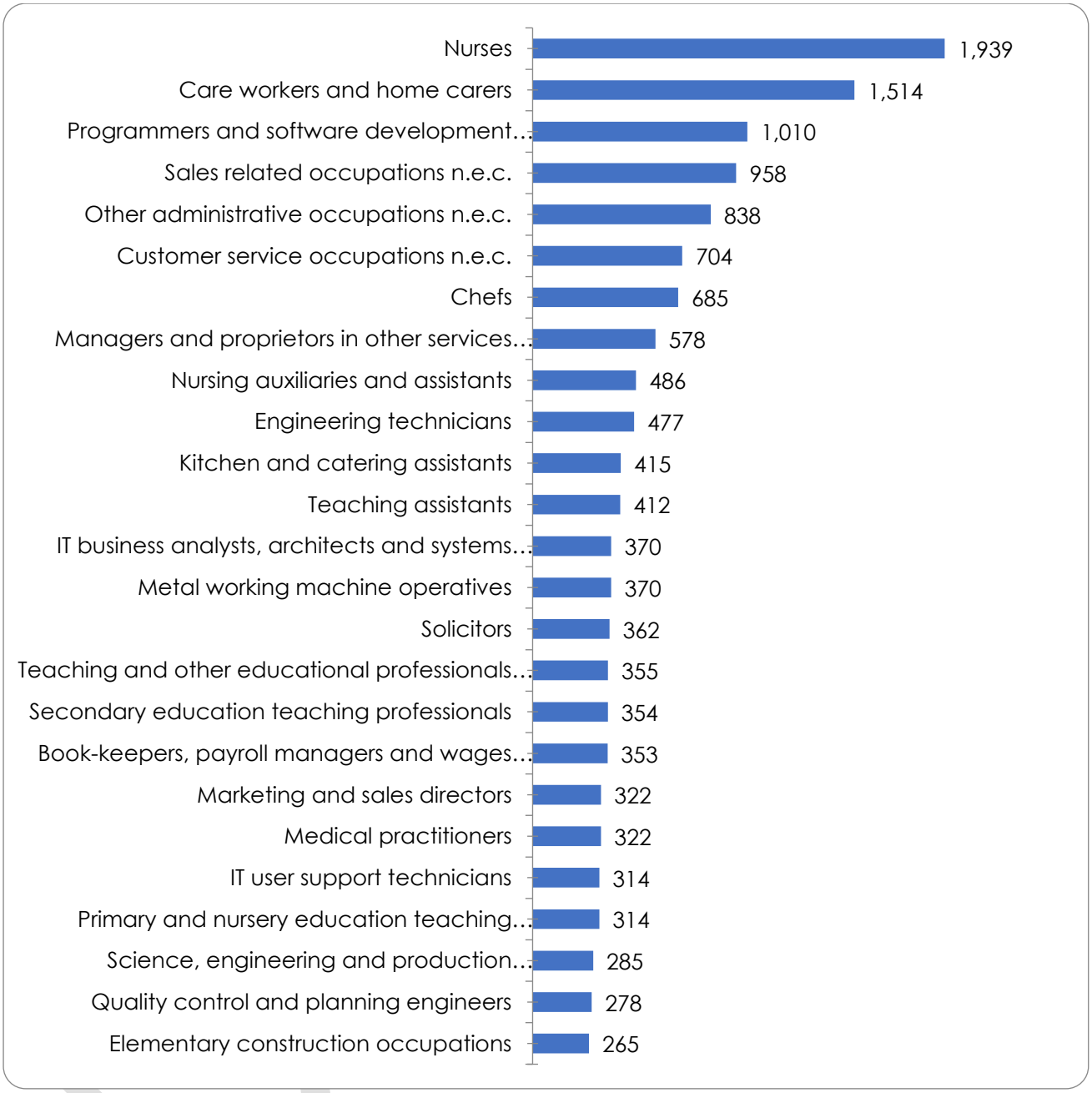


Figure 82. Advertised jobs in Dorset Council (including Christchurch) by occupation (2019). Labour Insight

Within the Dorset Council area (which included Christchurch at the time), the location of advertised jobs are shown in.

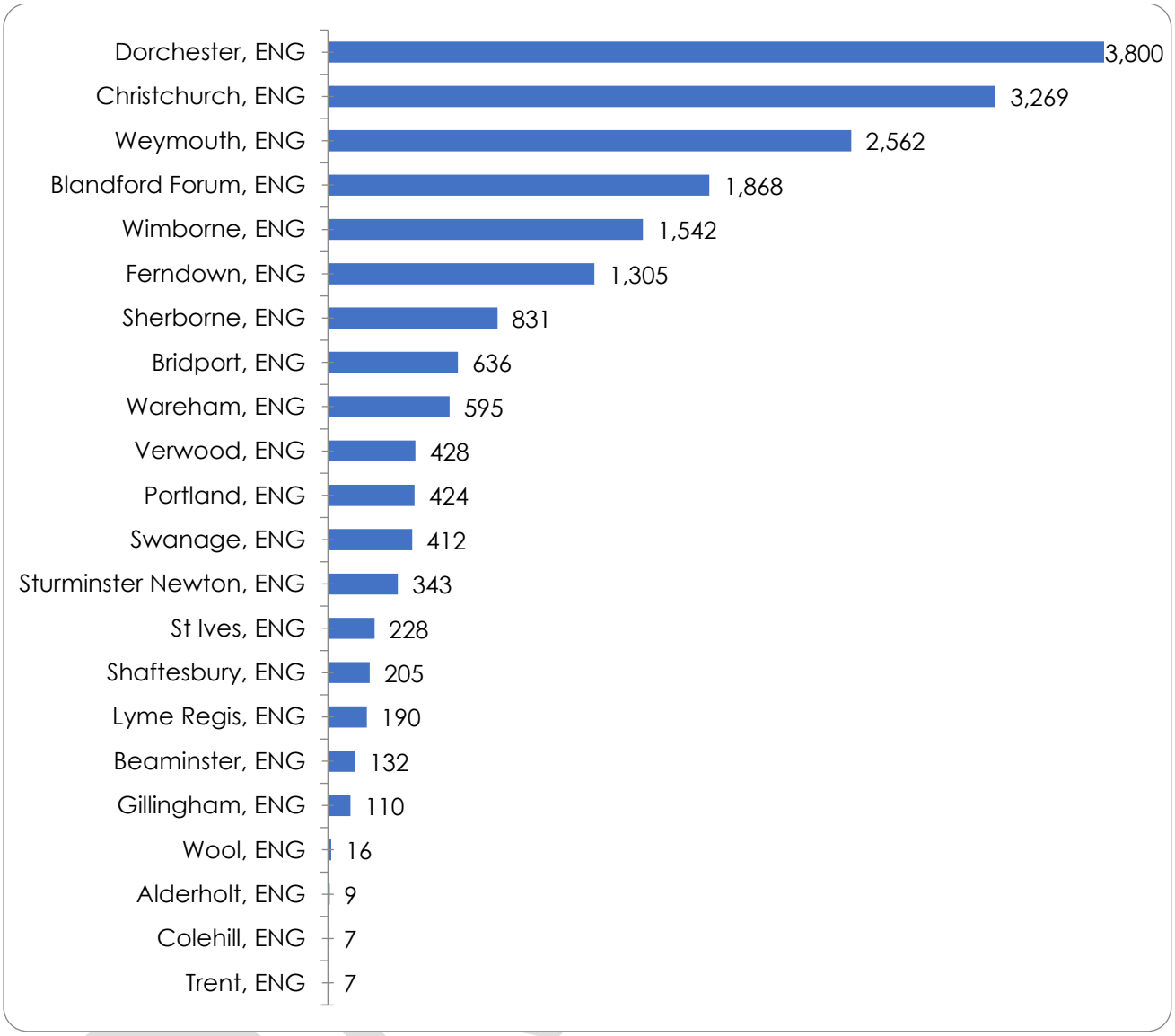


Figure 83. **Locations within Dorset according to advertised jobs (2019).** Labour Insight – Burning Glass

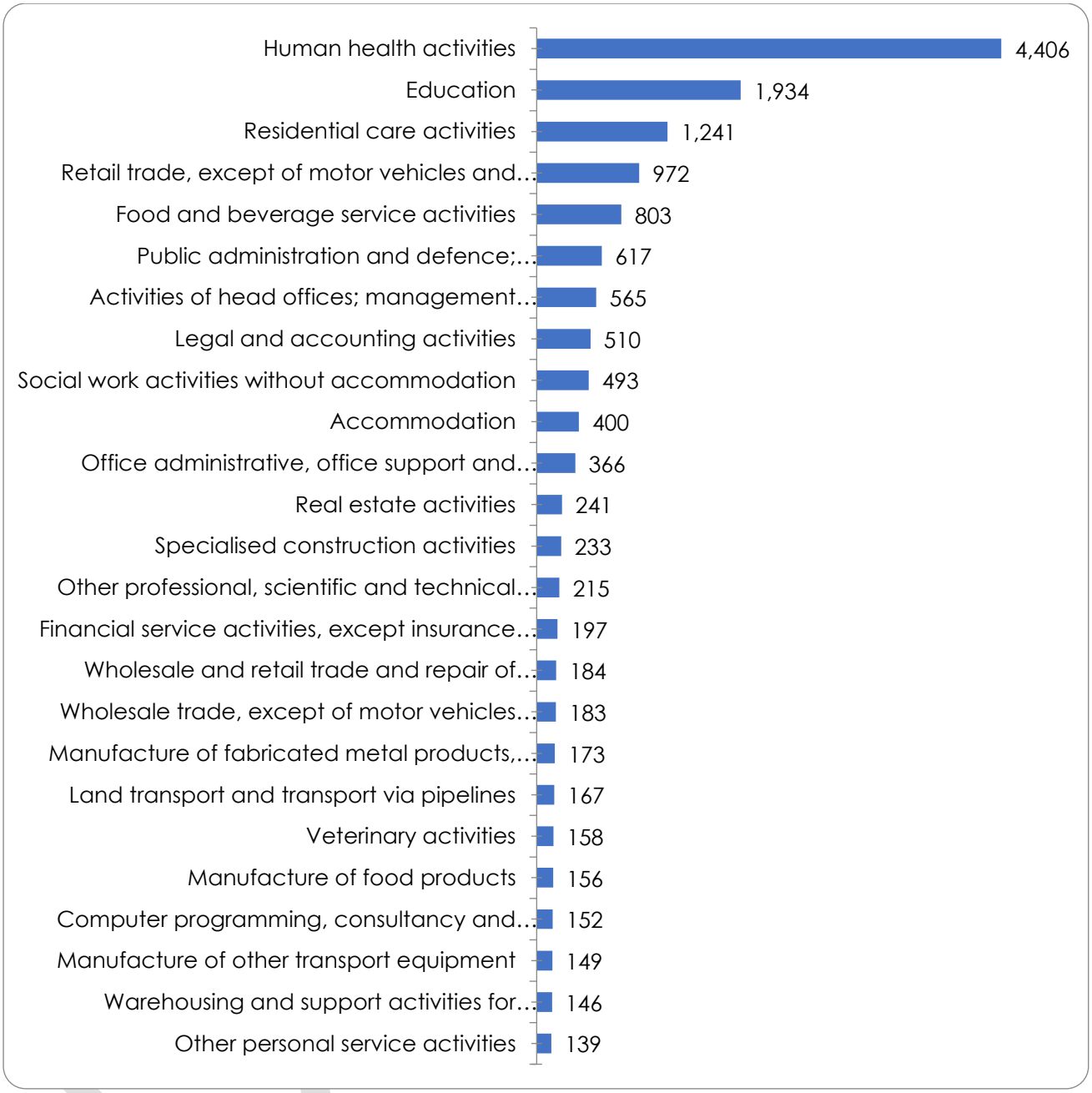


Figure 84. Advertised jobs in Dorset Council (including Christchurch) by industries (2019). Labour Insight

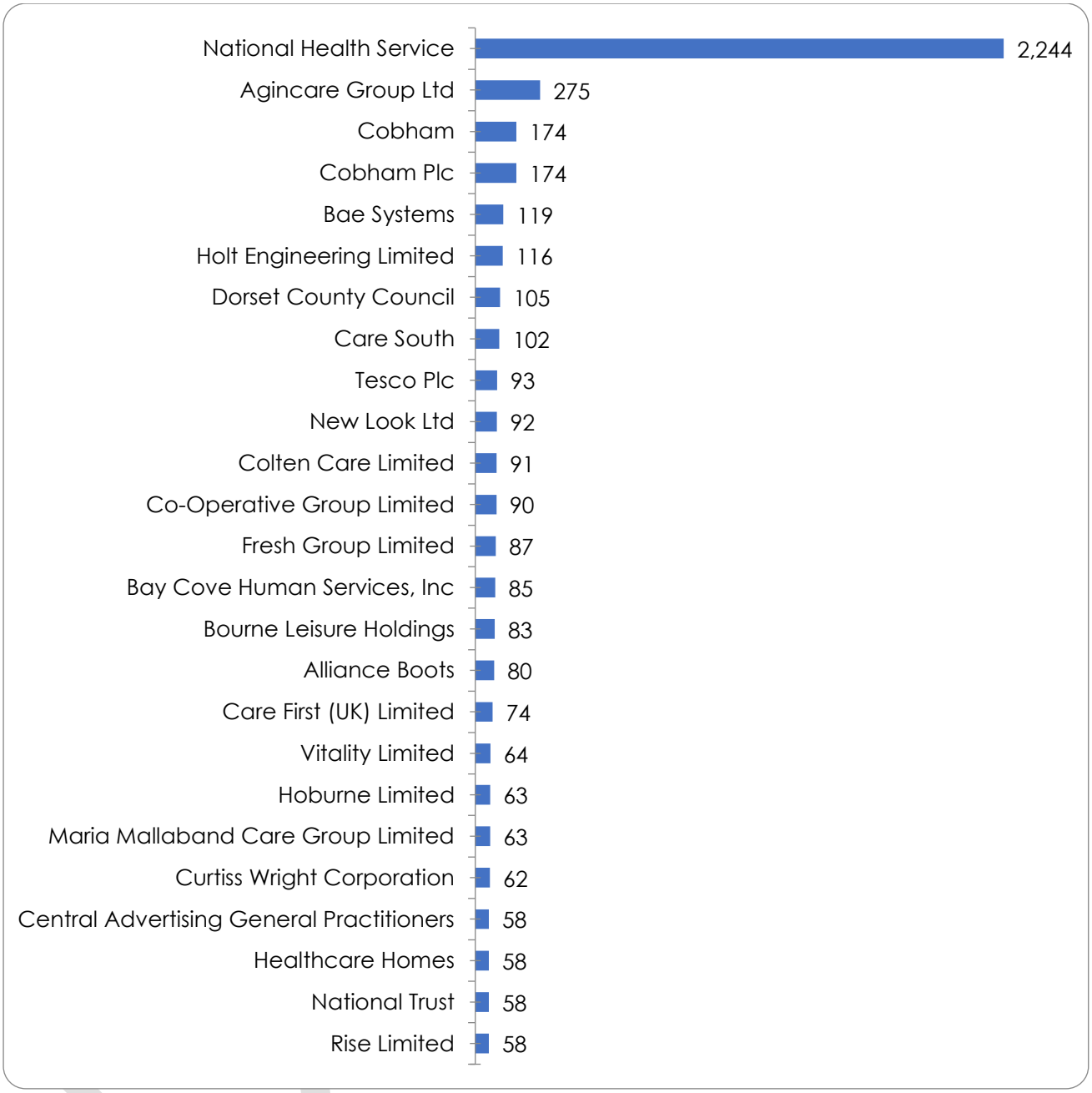


Figure 85. Advertised jobs in Dorset Council (including Christchurch) by industries (2019). Labour Insight

Looking into the future

While looking into the immediate demand is useful, it is not providing the full picture of new and emerging jobs and occupations. Here we therefore list a range of specialisms are set to **increase in demand** with the use of **technology** in the UK[41]:

- Software and Applications Developers and Analysts
- Ecommerce and Social Media Specialists

Key occupations in demand in UK in 2019

- Cyber Security Analysts
- Data Analysts and Scientists
- Java Developers

Emerging new specialist roles related to understanding the latest emerging technologies:

- AI, Machine Learning and Big Data Specialists
- Process Automation Experts
- Information Security Analysts
- User Experience and Human-Machine Interaction Designers
- Robotics Engineers
- Blockchain Specialists

A range of specialisms leveraging distinct **'human' skills** are set to experience **increased demand** in the UK:

- Customer Service Workers
- Managing Directors and Chief Executives/ General and Operations Managers
- Sales and Marketing Professionals
- HR, Training and Development, People and Culture, and Organisational Development Specialists
- Financial and Investment Advisers
- Innovation Managers

Skills and Qualifications Demand

This section looks into the current and projected demand for skills and qualification levels within the Dorset workforce. These questions carry great importance for the local economy, as when making decisions to implement innovations, or consider a place for investment, companies will prioritise the availability of skilled local talent as their foremost consideration.41

Education and Qualifications

As illustrated in the previous section, minimum qualifications requirements specified within job vacancies show considerable variations across occupations.

[41] World Economic Forum, The Future of Jobs Report 2018

Generally speaking, for occupations such as managers, professionals and associate professionals (SOC groups 1-3), employers tend to expect higher-level qualifications. Conversely, many of the more elementary occupations will require lower qualification levels.

On average, qualification requirements are rising for most occupations, which partly reflects the fact that the population is becoming more qualified and especially young people acquiring higher-level qualifications. At the same time, older people, who are less well-qualified on average, will retire from the labour force.

We explore Dorset's qualification levels in detail in the Employer feedback - In our 2020 survey, almost one quarter (23%) of employers surveyed recently for this research reported they have had at least one hard-to-fill vacancy in the last 12 months with the most common reason given being lack of applicants with the right skills. Among the 'Skills Shortage Vacancies' employers mentioned manufacturing/ engineering, sales and marketing, human health, chefs and other hospitality and Professional services roles - accounting / finance/ legal roles, which align with our findings.

In addition, over half of employers (56%) reported at least one type of skills gap across their existing workforce with 1 in 3 (36%) reporting multiple gaps. Those most commonly experienced were **Digital, Sales and Marketing, Analytical, Leadership and Management skills gaps.**

-

Supply of Labour & Skills section of this report, while here just illustrating briefly the current employment base by qualification level in reference to expected future shifts in qualification levels. Figure 86 shows that 41% of those currently employed in Dorset are qualified to Level 4 or higher, which is in line (albeit slightly lower) than the South West and UK, where 45% of those employed are qualified to these levels.

In terms of forecasting projections[42] illustrated in Figure 88 at a national level and in Dorset in Figure 89, there is an expectation that the qualification profile of those in employment will continue to see a shift towards more people holding more high-level qualifications. By 2027, around 55% of the employed in Dorset are expected to be qualified at level 4 and above, whilst the proportion of people with level 1 or no formal qualifications is expected to shrink further.

This growing demand for formal qualifications is most clearly reflected in the net demand projected in the previous section (through expansion and replacement expected over the period between 2017 and 2027), where a marked shift in occupational employment structure in favour of the three highest skilled occupational groups was demonstrated.

Across the projected net demand, the picture is stark, illustrating over 77% of jobs that would become available through replacement and expansion demand in Dorset over the period 2017-2027 will require Level 5 qualifications and above, equivalent to circa 144,000 jobs to 2027. Therefore, this may raise questions over the role that HE/FE providers will play in meeting this demand (both locally and elsewhere). The projected net requirement breakdown of these qualifications for each major occupation is shown in Figure 89.

[42] Working Futures 2017-2027 – Long-run labour market and skills projections for the UK, DfE, Cambridge Econometrics local workbooks, 2020

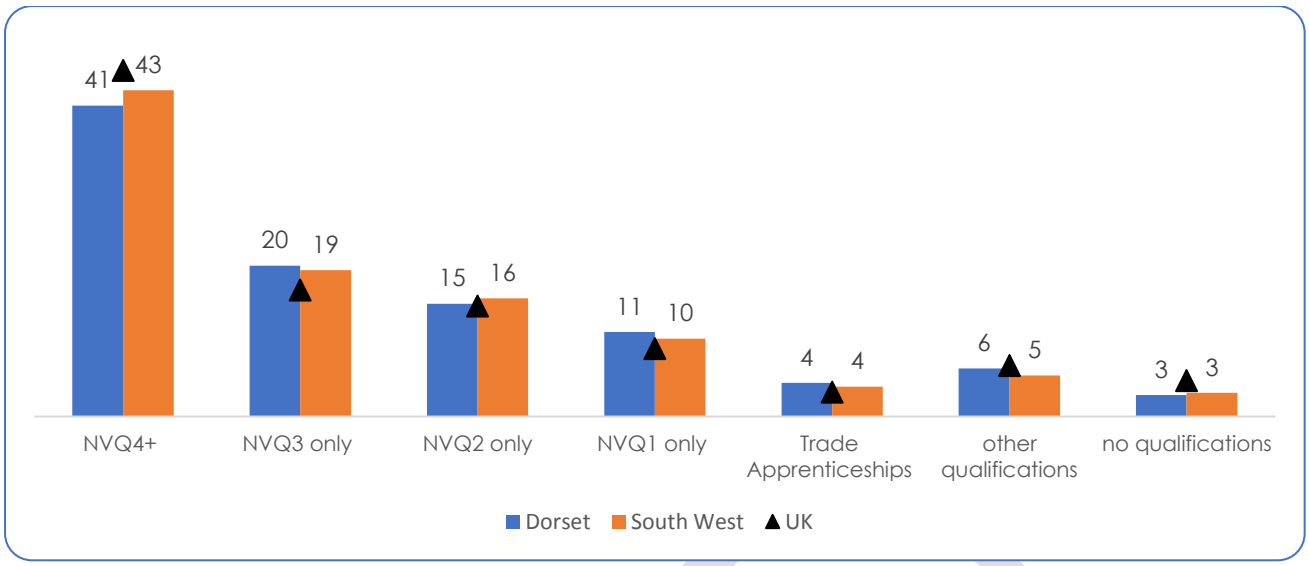


Figure 86. Percentage in employment by qualification levels – DLEP, 2019, Annual Population Survey

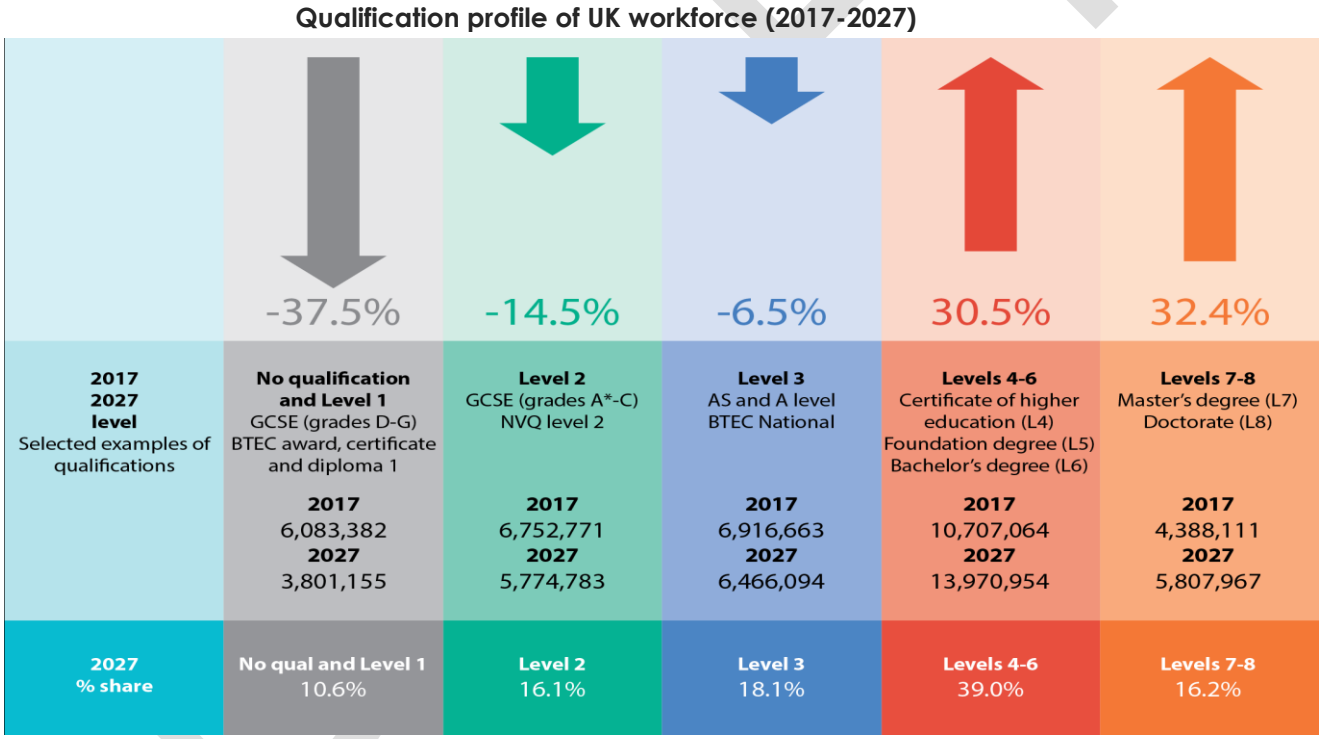


Figure 87. Qualification profile of UK workforce (2017-2027). Working Futures 2017-2027

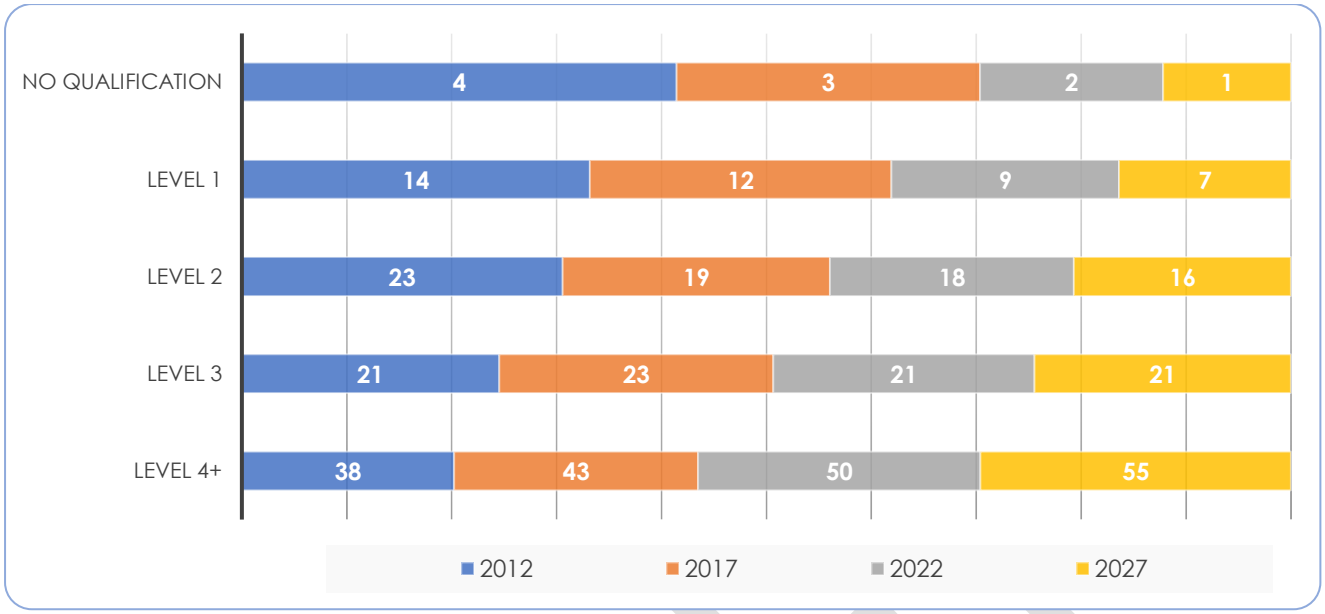


Figure 88. Projected share (%) of qualifications for those in employment (Dorset). Working Futures 2017-2027) – Cambridge Econometrics

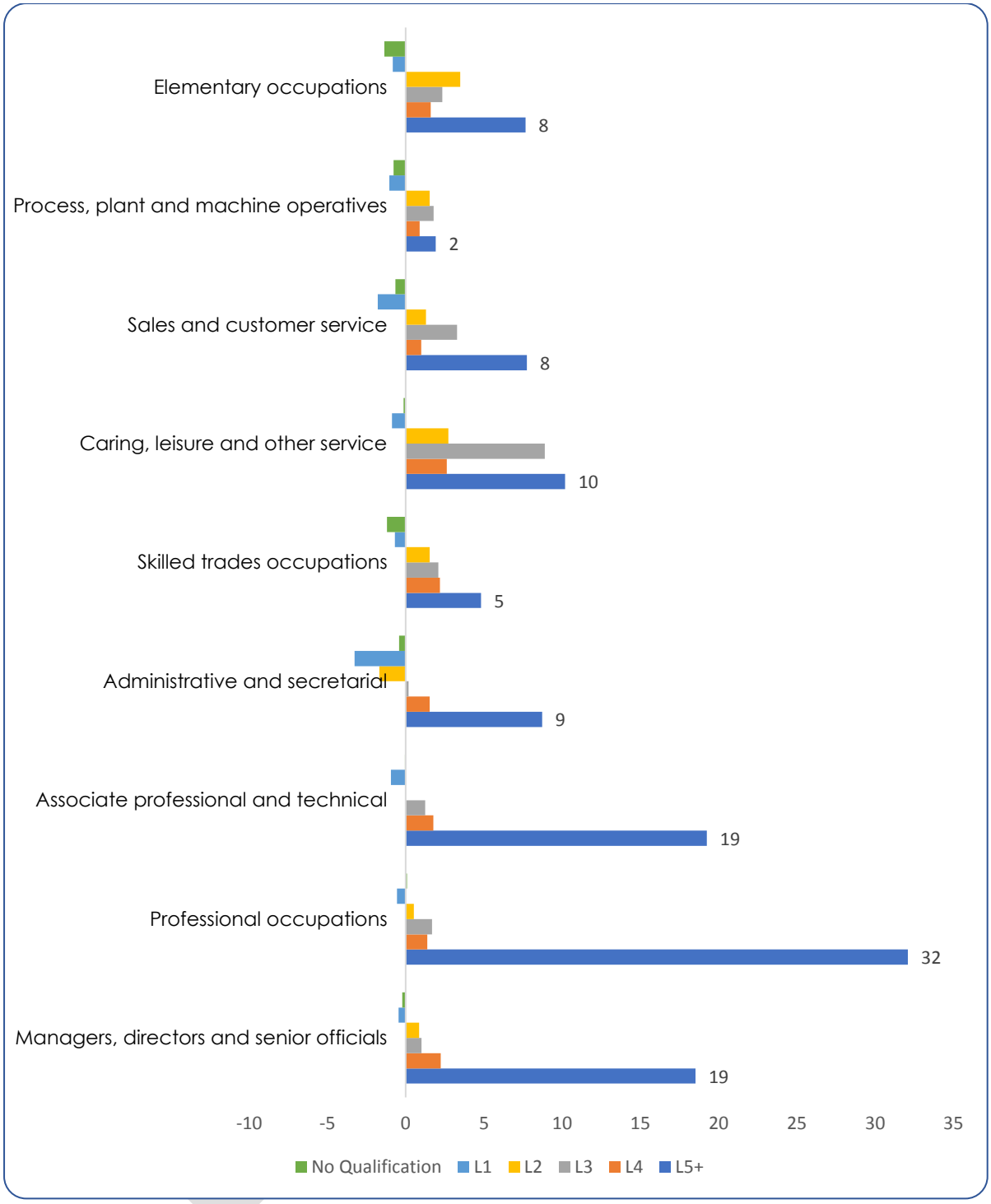


Figure 89. Projected net required jobs by qualification level (2017-2027 – 000s). Working Futures Dorset Local Workbooks – Cambridge Econometrics, 2020

In terms of the qualification requirements for those jobs advertised, these have been presented in earlier sections at industry level (Vacancies by Industry: Labour Market Intelligence) and by occupational groups (Vacancies by Occupation: Labour Market Intelligence).

In general, the most predominant requirement was for degree level qualifications. Over the past year (2019) almost half of the jobs requested Level 4 or above as a minimum qualification.

However, there was also a large proportion of jobs with minimum requirement for Level 2 education, which is much higher than predicted and could be an indicator of employers' willingness to take on individuals with lower qualifications and train them on the job. However, it is useful to note that of the c63,000 jobs that were advertised, 53,000 did not specify qualification requirement. Therefore, these observations represents a small sample of the jobs.

This data then can be broken down further to highlight which employers have been recruiting into jobs at which qualification levels over 2019. For example, Figure 90 illustrates those employers who tend to look to fill roles that require a degree-level qualification.

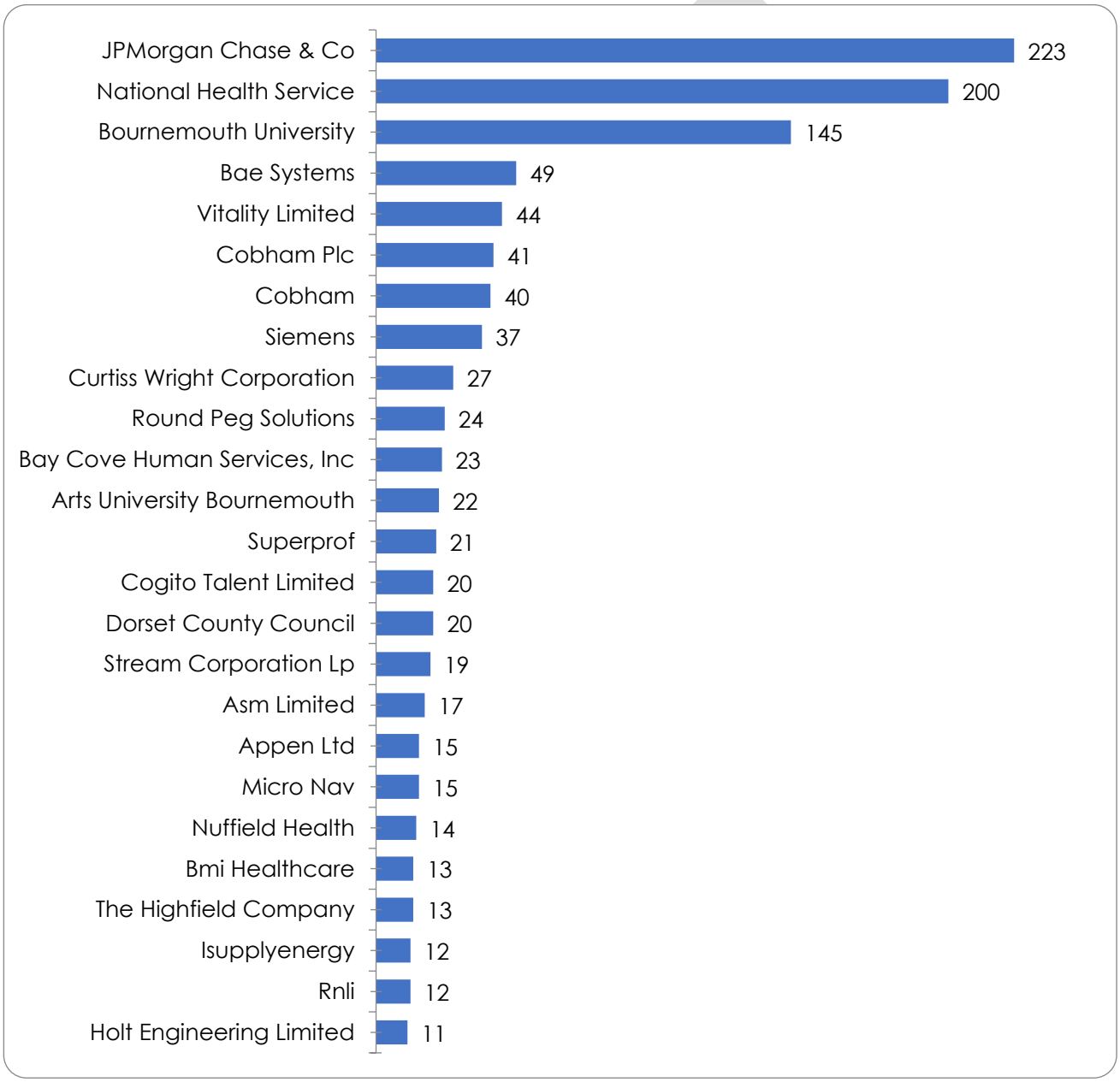


Figure 90. Organisations recruiting into roles at degree level (DLEP – 2019). Labour Insight

Figure 91 highlights those organisations recruiting at Levels 2 & 3.

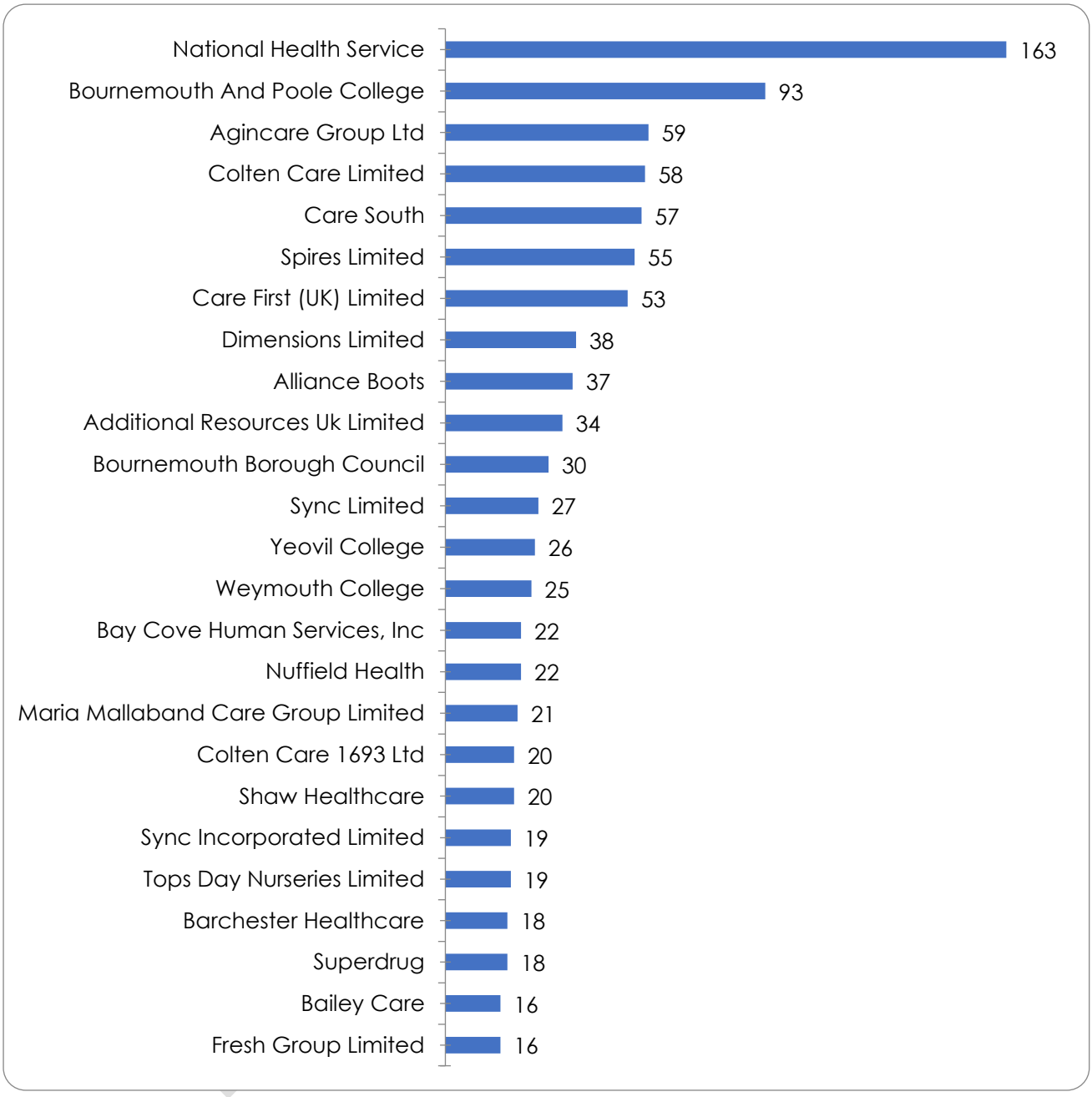


Figure 91. **Organisations recruiting into roles at level 2 and 3 (DLEP – 2019).** Labour Insight

In terms of the specific formal certifications that have been required in the jobs advertised across Dorset, this is shown in **Figure 92**. This data relates to jobs advertised through 2018 and 2019 and shows that the Construction Skills Certification Scheme (CSCS) card is required most, followed by Registered General Nurse (RGN) qualification.

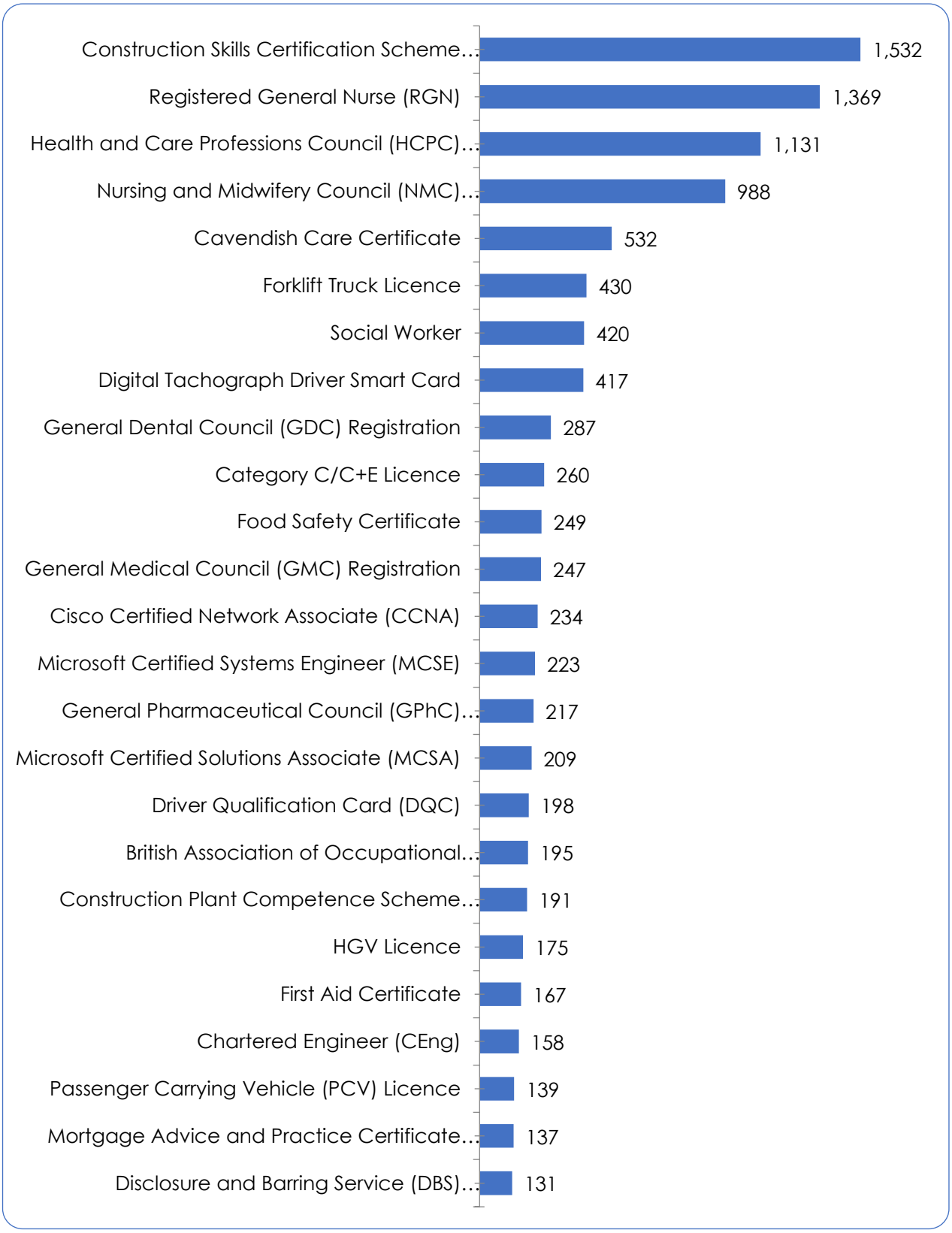


Figure 92. Formal certifications required within job openings. Dorset,2018-2019. Labour Insight

Skills in Demand

In order to establish the skills that are most in demand in Dorset now and in the near future, we utilised data from Labour Insight, combining econometric time series with machine learning to aggregates the skills that are most commonly requested (2020-21). The following tables include the top 50 ranking **general** (Table 22) and **digital** (Table 23) skills from all the job vacancies advertised in Dorset that implicitly list skills requirements (c53,000). For each skill, we show the number of jobs it appeared in and its likelihood to grow in the future. The key specialised skills are then broken down into industries in Table 24 and the top specialised skills within jobs of highest demand in Dorset over 2019 are listed in Table 25 for reference.

General Skills

The **general or transferable skills** (Table 22) are linked to attitudes, attributes to work or soft skills that are traditionally valued by employers and expected to see a continued demand. The top 50 general skills in Dorset can be grouped into the following broad themes:

- **Human interaction skills** – general communication skills were specified in over 13,500 vacancies and *oral, written and telephone communication skills such as writing, editing, listening, speaking, telephone manner, presenting, articulating ideas and persuading others* - appear in over 26,000 or half of job adverts with skills recorded.
  On top of that:
  - **people management skills** including managing others, leadership and mentoring were requested in c5,000 of the adverts,
  - **language skills** were cited in c4,000 of the adverts (including English, foreign languages – among them French, German and Spanish most commonly required)
  - and 2,600 of job adverts requested more specific interaction skills around **building teams and successful relationships**;
- **Personal productivity skills** - Managing workload and achievements, goal-setting, meeting deadlines, planning, organisation, time-management, prioritisation and multitasking appear in c15,000 or a third of vacancies advertised;
- **Analytical, problem-solving and decision-making skills** based on existing information such as research, analysis, independent, critical and strategic thinking and orientation to detail, preparing reports, creative problem solving, troubleshooting appear in c11,000 or a fifth of vacancies advertised;
- **Personal attributes** such as positive disposition, energy, initiative, creativity, self-motivation and ability to learn quickly appear in c6,000 or over a tenth of vacancies advertised;
- **Computer literacy** was also among the most common requirements required in over a fifth of vacancies c.11,000 including mainly Microsoft Office tools proficiency and online research;

While these observations show near-term trends, there is a wider plethora of research and think pieces on the longer term future skills developments in support of soft skills as essential addition to the core specialised and technical competencies required for performing a job. Within rapidly changing labour markets, and technology continuing to reshape industries, 'human' or 'soft' skills, currently beyond the reach of smart machines, such as emotional intelligence, service orientation and active learning, are vital as organisations function in a volatile global digital context[43].

[43] CBI/ Pearson, 2017, Helping the UK thrive: CBI/ Pearson Education and Skills Survey 2017

Digital and Technical Skills

The key **technical** skills and **digital tools and applications** that employers are looking for are illustrated in Table 23. With the increased virtual and distance working requirements and given the well-established prevalence of skills shortages and difficulties in employing STEM specialists (43% of STEM vacancies being hard to fill due to a shortage of applicants[44]) it is unsurprising that these skills are increasingly critical. The inherent difficulty with digital skills projections however is with fast-moving technological developments they have a relatively short "shelf life", so we have to make a note of caution they are more prone to 'disrupting' influences than the general soft skills discussed above.

- As expected, **Microsoft Office** applications (Excel, Word, PowerPoint, Outlook), jointly appear in almost 9,000 vacancies, and remain in highest demand with **Excel and Outlook demand on the rise**.
  - Software development and engineering are expected to remain stable (n=c2000) and significant demand is projected in **programming languages** (n>5000), with **Python** expected to grow, the majority to remain stable (Java, JavaScript, C++, PHP, HTML, UML), while Microsoft C#, .NET, XML and jQuery may see a decline.
  - Productivity tools for managing enterprises and customers such as **ERP (Enterprise Resource Planning), SAP and CRM** become increasingly important, as do tools for managing problems and projects such as **Scrum**, as well as automation and configuration tools such as **PowerShell**.

Specialised Skills

The breakdown of top specialised skills in demand within industry sectors is shown in Table 24. These skills have emerged as highly sought after, required in large volume of vacancies within industries and represent the wider occupational demand in Dorset discussed in previous sections with skills clustered around nursing, care work, sales, programming, etc. We have therefore included a list of key skills within the occupations that are most in demand in Dorset in Table 25 for reference.

What is worth noting here is that apart from the job-specific skills, the majority of jobs require relatively 'generic' skillsets as listed earlier, such as customer service and contact, teamwork and collaboration, budgeting and project management. This highlights the importance of holistic educational programmes that combine key specialist with key soft skills – a concept, which has seen wider support in research. A CIPD study showed for example that given the shortages in STEM subjects, computer science graduates were most likely to fail to secure a job six months after graduation with almost 1 in 10 unemployed at this point (almost double in comparison to History and Philosophy graduates)[45]. Previous research has suggested that many STEM graduates lack the experience and 'soft' skills employers are looking for,[46] which could be an explanation. In addition, 92% of companies rated the importance of these skills at least as high as 'hard' skills and 80% stated their significance to company success is increasing[47], while 90% of employers have rated aptitudes for work as the most important factor when hiring young people.

[44] CBI/ Pearson, 2015, Inspiring growth: CBI/Pearson education and skills survey 2015

[45] CIPD Policy Report, November 2017, The graduate employment gap: expectations versus reality

[46] CBI, 2012, Learning to grow: what employers need from education and skills: education and skills survey 2012.

[47] LinkedIn Talent Solutions, 2019, Global Talent Trends 2019

Table 22. Top 50 general skills requirements and near term projections (DLEP 2019). Labour Insight

	Skill	Growing/ Stable/ Declining	Postings Requested
1	Communication Skills	▲	12487
2	Organisational Skills	–	6111
3	Detail-Orientated	–	4448
4	Planning	–	4329
5	Microsoft Excel	▲	4000
6	English	▲	3369
7	Creativity	–	3330
8	Microsoft Office	–	2797
9	Problem Solving	–	2757
10	Writing	▲	2366
11	Building Effective Relationships	–	2329
12	Leadership	–	2320
13	Computer Literacy	–	1871
14	Research	–	1829
15	Time Management	▲	1707
16	Multi-Tasking	▲	1338
17	People Management	–	1264
18	Meeting Deadlines	–	1158
19	Positive Disposition	▲	1052
20	Verbal / Oral Communication	–	1032
21	Presentation Skills	–	1020
22	Mentoring	–	968
23	Microsoft Word	–	947
24	Listening	▲	936
25	Written Communication	–	892
26	Microsoft Powerpoint	–	837
27	Energetic	▲	797
28	Troubleshooting	–	768
29	Typing	–	694
30	Decision Making	–	682
31	Prioritising Tasks	–	672
32	Self-Starter	–	590
33	Articulate	–	578
34	Analytical Skills	–	514
35	Microsoft Windows	▼	403
36	Microsoft Outlook	▲	383
37	Editing	–	324
38	Team Building	–	274
39	Physical Demand	–	261
40	Telephone Skills	–	254
41	Preventive Maintenance	▲	252
42	Persuasion	–	245
43	Self-Motivation	▲	232
44	Word Processing	–	230
45	Oral Communication	–	181
46	Quick Learner	–	169
47	Bilingual	–	151
48	Preparing Reports	–	128
49	Initiative	▲	124
50	French	▲	96

Table 23. Top 50 digital and technical skills requirements and near term projections (DLEP 2019). Labour

	Skill	Growing/ Stable/ Declining	Postings Requested
1	Microsoft Excel	▲	4000
2	Microsoft Office	–	2797
3	SQL	–	1346
4	Software Development	–	1175
5	Microsoft C#	▼	1029
6	Microsoft Word	–	947
7	Software Engineering	–	899
8	JavaScript	–	862
9	Microsoft Powerpoint	–	837
10	.NET	▼	761
11	Enterprise Resource Planning (ERP)	–	571
12	SAP	▲	571
13	LINUX	–	565
14	Customer Relationship Management (CRM)	▲	557
15	SQL Server	▼	481
16	Java	–	466
17	VMware	–	449
18	C++	–	445
19	Microsoft Windows	▼	403
20	Windows Server	–	402
21	AutoCAD	–	401
22	Microsoft Azure	▲	394
23	Active Server Pages (ASP)	▼	390
24	Microsoft Outlook	▲	383
25	ASP.NET	▼	373
26	Adobe Photoshop	–	368
27	Git	▲	365
28	Python	▲	363
29	Facebook	–	362
30	Scrum	–	345
31	Hypertext Preprocessor (PHP)	–	337
32	Microsoft SQL	▼	317
33	Microsoft Exchange	▼	300
34	MySQL	▼	255
35	SolidWorks	–	255
36	Extensible Markup Language (XML)	▼	245
37	Microsoft Sharepoint	▼	244
38	jQuery	▼	242
39	HTML5	–	240
40	Adobe Indesign	–	237
41	Word Processing	–	230
42	AngularJS	–	224
43	Unified Modelling Language (UML)	–	217
44	Hyper-V	▲	216
45	Microsoft PowerShell	▲	214
46	Oracle	▼	211
47	Voice over IP (VoIP)	–	210
48	ASP.NET MVC	–	208
49	Salesforce	▲	205
50	Citrix	▼	202

Table 24. Top specialised skills requirements within industries (DLEP 2019). Labour Insight

Industry Sector	Job Postings (2019)	Industry Sector	Job Postings
Human health activities	**8271**	**Education**	**4316**
Teamwork / Collaboration	1373	Teaching	2890
Working With Patient / Condition: Mental He	1111	Autism Diagnosis / Treatment / Care	332
Patient Care	723	Teamwork / Collaboration	233
Surgery	533	Tutoring	218
Nursing Home	482	Working With Patient And/Or Condition: Men	194
Dementia knowledge	405	Lecturer	186
Care Planning	393	Psychology	150
Administrative Support	367	Faculty Training	143
Primary Care	322	Working With Patient And/Or Condition: Atte	140
Rehabilitation	317	Child Care	134
Retail trade, except of motor vehicles and motorcycles	**2211**	**Residential care activities**	**1936**
Customer Service	668	Nursing Home	378
Sales	416	Dementia knowledge	276
Retail Industry Knowledge	415	Home Management	244
Teamwork / Collaboration	237	Care Planning	231
Store Management	217	Working With Patient And/Or Condition: Men	167
Key Performance Indicators (KPIs)	164	Companionship	163
Customer Contact	154	Elder Care	147
Patient Care	127	Medication Administration	140
Retail Management	112	Staff Management	139
Product Sales	105	Cleaning	123
Food and beverage service activities	**1760**	**Public administration and defence; compuls**	**1190**
Cooking	461	Customer Service	146
Teamwork / Collaboration	286	Teamwork / Collaboration	111
Customer Service	226	Teaching	104
Food Safety	96	Project Management	78
Cleaning	91	Budgeting	72
Budgeting	78	Business Development	69
Food Preparation	75	Surveillance	64
Restaurant Management	72	Procurement	52
Stock Control	72	Administrative Support	44
Guest Services	69	Staff Management	44
Financial service activities, except insurance and pension funding	**1153**	**Social work activities without accommodation**	**1011**
Teamwork / Collaboration	268	Child Care	122
Project Management	212	Social Work	116
Customer Service	203	Working With Patient And/Or Condition: Men	93
Securities	129	Dementia knowledge	92
Stakeholder Management	129	Nursing Home	86
Business Analysis	119	Teamwork / Collaboration	69
Customer Contact	112	Medication Administration	67
Derivatives	106	Cleaning	64
Risk Management	87	Teaching	64
Change Management	85	Care Planning	59
Accommodation	**1009**	**Legal and accounting activities**	**992**
Teamwork / Collaboration	190	Business Development	169
Cooking	185	Legal Support	107
Cleaning	100	Litigation	103
Customer Service	96	Secretarial Skills	71
Housekeeping	73	Teamwork / Collaboration	63
Budgeting	63	Commercial Litigation	59
Sales	63	Case Management	58
Administrative Support	51	Customer Service	54
Guest Services	44	Client Base Retention	50
Stock Control	39	Administrative Support	48

Table 25. Occupations and skills demand (2019, Dorset). Labour Insight

Occupation/ Skills	Advertised Vacancies 2019
Nurses	3,262
Working With Patient And/Or Condition: Mental Health	563
Nursing Home	488
Teamwork / Collaboration	461
Dementia knowledge	394
Care Planning	379
Patient Care	376
Elder Care	212
Surgery	171
Primary Care	146
Staff Management	141
Care workers and home carers	2,628
Working With Patient And/Or Condition: Mental Health	365
Autism Diagnosis / Treatment / Care	299
Meal Preparation	243
Dementia knowledge	239
Medication Administration	229
Care Planning	222
Nursing Home	198
Emotional Support	184
Cleaning	176
Companionship	162
Sales related occupations n.e.c.	2,409
Sales	1,719
Customer Service	586
Customer Contact	279
Sales Goals	260
Teamwork / Collaboration	258
Account Management	216
Product Sales	207
Business Development	198
Business-to-Business	197
Key Performance Indicators (KPIs)	176
Programmers and software development professionals	2,141
Software Development	791
Microsoft C#	760
Software Engineering	680
SQL	578
.NET	547
JavaScript	433
Java	356
C++	330
Active Server Pages (ASP)	275
ASP.NET	269

Occupation/ Skills (continued)	Advertised Vacancies 2019
Customer service occupations n.e.c.	1,939
Customer Service	1,394
Customer Contact	283
Teamwork / Collaboration	259
Retail Industry Knowledge	160
Sales	152
Social Media	93
Key Performance Indicators (KPIs)	79
Product Sales	61
Service Level Agreement	59
Data Entry	54
Other administrative occupations n.e.c.	1,788
Customer Service	326
Administrative Support	259
Secretarial Skills	246
Teamwork / Collaboration	213
Data Entry	120
Business Administration	104
Customer Contact	79
Spreadsheets	79
Scheduling	77
General Office Duties	74
Managers and proprietors in other services n.e.c.	1,271
Project Management	234
Budgeting	211
Operations Management	182
Customer Service	149
Teamwork / Collaboration	127
Staff Management	117
Key Performance Indicators (KPIs)	114
Retail Industry Knowledge	91
Sales	60
Stakeholder Management	57
Chefs	1,159
Cooking	1,135
Food Safety	171
Teamwork / Collaboration	152
Food Preparation	90
Budgeting	84
Stock Control	52
Customer Service	44
Cleaning	40
Facebook	30
Hazard Analysis Critical Control Point (HACCP)	25

Occupation/ Skills (continued)	Advertised Vacancies 2019
Kitchen and catering assistants	987
Teamwork / Collaboration	241
Customer Service	167
Cleaning	139
Food Preparation	108
Cooking	77
Cash Handling	48
Retail Industry Knowledge	31
Stock Control	30
Food Safety	27
Sales	26
Teaching assistants	897
Teaching	884
Autism Diagnosis / Treatment / Care	208
Working With Patient And/Or Condition: Attention Deficit Hyperactivity Disorder (ADHD)	97
Working With Patient And/Or Condition: Mental Health	74
Faculty Training	63
Psychology	53
Teamwork / Collaboration	32
Child Care	26
Tutoring	14
Child Protection	13
Nursing auxiliaries and assistants	872
Teamwork / Collaboration	122
Rehabilitation	77
Nursing Home	68
Phlebotomy	54
Working With Patient And/Or Condition: Mental Health	46
Care Planning	38
Patient Care	35
Working With Patient And/Or Condition: Bathing	31
Customer Service	30
Surgery	30
Engineering technicians	841
Manufacturing Processes	80
Repair	77
Predictive / Preventative Maintenance	73
Manufacturing Engineering	72
Plumbing	71
Teamwork / Collaboration	63
Computer Numerical Control (CNC)	58
Customer Service	58
Painting	53
Mechanical Engineering	52

Occupation/ Skills (continued)	Advertised Vacancies 2019
IT user support technicians	822
It Support	301
Technical Support	276
Customer Service	207
Microsoft Active Directory	187
SQL	155
Windows Server	126
ITIL	120
Application Support	99
Microsoft Exchange	80
Teamwork / Collaboration	80
Teaching and other educational professionals n.e.c.	811
Teaching	630
Tutoring	195
Autism Diagnosis / Treatment / Care	41
Customer Service	37
Working With Patient And/Or Condition: Mental Health	37
Patient Care	34
Faculty Training	32
Patient Advisement	32
Music	24
Working With Patient And/Or Condition: (ADHD)	20
Marketing and sales directors	797
Sales	393
Business Development	269
Sales Management	212
Budgeting	152
Marketing	149
Social Media	102
Business-to-Business	101
Sales Goals	99
Key Performance Indicators (KPIs)	97
Customer Service	89
Book-keepers, payroll managers and wages clerks	739
Accounting	319
Invoice Processing	194
Payroll Processing	147
Bookkeeping	141
Customer Checkout	109
Account Reconciliation	99
VAT Returns	92
Bank Reconciliation	75
Accounts Payable / Accounts Receivable	56
Teamwork / Collaboration	56

Occupation/ Skills (continued)	Advertised Vacancies 2019
Human resources and industrial relations officers	729
Employee Relations	87
Human Resource Management Industry Knowledge	86
Customer Service	70
Social Media	64
Teamwork / Collaboration	64
Administrative Support	55
Sales	52
Staff Management	44
HR Policies	39
Data Entry	37
IT business analysts, architects and systems designers	714
Systems Engineering	196
Microsoft Active Directory	109
VMware	104
Windows Server	97
SQL	96
Teamwork / Collaboration	86
Cisco	73
Microsoft Exchange	72
Microsoft Azure	68
Wide Area Network (WAN)	67
Solicitors	687
Business Development	166
Litigation	92
Commercial Litigation	53
Teamwork / Collaboration	42
Client Base Retention	39
Contract Preparation	37
Budgeting	35
Contract Draughting	35
Tax Planning	30
Case Management	27
Sales and retail assistants	673
Sales	241
Customer Service	209
Teamwork / Collaboration	132
Retail Industry Knowledge	127
Retail Sales	101
Product Sales	59
Sales Goals	53
Customer Contact	46
Merchandising	45
Product Knowledge	41

Occupation/ Skills (continued)	Advertised Vacancies 2019
Metal working machine operatives	671
Computer Numerical Control (CNC)	493
Machining	194
Engineering Drawings	112
Machine Operation	92
Computerised Numerical Control Lathes	85
Siemens Nixdorf Hardware	75
Technical Recruiting	66
Milling Cutters	65
Teamwork / Collaboration	65
Customer Service	44
Secondary education teaching professionals	671
Teaching	650
Physics	33
History	24
Biology	20
Chemistry	20
Working With Patient And/Or Condition: Mental Health	20
Autism Diagnosis / Treatment / Care	17
Music	14
Faculty Training	11
Lesson Planning	10
Medical practitioners	601
Surgery	104
Psychiatry	75
Teamwork / Collaboration	70
Teaching	55
Working With Patient And/Or Condition: Mental Health	48
General Surgery	34
Primary Care	34
General Practice	31
Anaesthesiology	29
Obstetrics	28
Marketing associate professionals	544
Marketing	222
Social Media	173
Business Development	98
Sales	95
Digital Marketing	80
Teamwork / Collaboration	80
Google Analytics	77
Budgeting	66
Adobe Photoshop	62
Business-to-Business	61

Employer Feedback on Skills Demand and Supply

Note that the main sources presented here are based on survey data collected prior to the coronavirus crisis in the UK. These sources were therefore not aimed at exploring the topic and respondents did not mention it at the time.

Having established the demand within Dorset industries, occupations and skills, this section explores workforce challenges and skills gaps experienced by local employers.

Skills gaps and talent mismatch are a known concern for employers both nationally and globally referred to as "global skills dilemma", affecting most of the businesses. On national level, overall skills shortage cost is estimated to reach £4.4 billion[48]. It is also known that talent mismatch impacts business confidence when pursuing digital transformation[49] that is critical for Dorset's businesses to succeed, compete and address the key productivity and economic challenges.

To better understand the views and experiences of employers with the local skills system, we present and compare, where applicable, two main sources:

- **Dorset Employer Skills Survey 2020 (DESS)[50] -** delivered by Serco and their sub-contractor Winning Moves, this survey was commissioned by Dorset LEP to inform this work and explore employers' skills needs and perceptions of skills provision in Dorset. Data was collected between 6th January and 18th February 2020 receiving 242 responses. It should be noted that the sample size from this survey is small compared to the whole business population, and the data should be interpreted in that context[51].

- **Employer Skills Survey 2017 (ESS)-** national survey based on 80,000 telephone interviews with employers, the Employer Skills Survey gathers information on the skills challenges that employers face within their existing workforces and in terms of bringing in new skilled labour, the levels and nature of training investment and the relationship between skills challenges, training activity and business strategy. The last survey was carried out in 2017, although there is a more recent survey with data collected during 2019 for which the results will be available later in 2020.

The different timeframes, sample sizes, and specifics of question design of these two sources has to be acknowledged. The two surveys should not be directly compared for these reasons, but we do place findings alongside each other where useful.

[48] The Edge Bulletin, July 2019, Skills Shortages in the UK Economy

[49] Hays and Oxford Economics, 2019, The Global Skills Dilemma: How can supply keep up with demand? The Hays Global Skills index 2019

[50] Dorset Employer Skills Survey 2020 – full report available from dorsetlep.co.uk/labour-market-and-skills-research

[51] Based on a sample of 242 businesses against an estimated business population of c32,650 (number of enterprises in DLEP area – ONS), then – assuming the sample is representative – this would result in a confidence interval of +/- 6.3 at 95% confidence level.

Vacancies & Recruitment

In our 2020 survey almost one quarter (23%) of employers surveyed reported they have had at least one hard-to-fill vacancy in the last 12 months with the most common reason given being lack of applicants with the right skills.

In the Employer Skills Survey 2017, employers were asked whether they had any **current** hard-to-fill vacancies, and 19% of Dorset businesses responded they currently had a vacancy (equivalent to circa 12,500 vacancies at that time or 4% of total employment) and 9% deemed at least one of their current openings as a hard-to-fill vacancy.

Importantly, in the 2017 survey, 29% of all vacancies were considered to be 'Skills Shortage Vacancies' (SSVs). That is, they were unable to find individuals with the requisite skills to fill that particular vacancy. Figure 93 indicates that the incidence of SSVs was higher in Dorset and the South West than nationally.

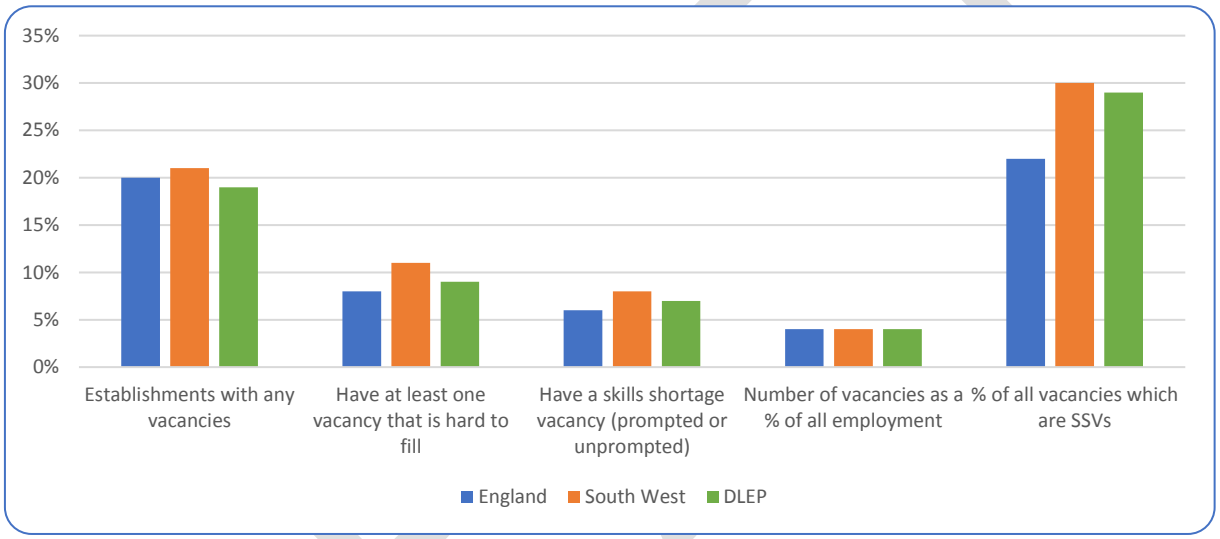


Figure 93. Proportion (%) of businesses with hard-to-fill vacancies (DLEP). Employers Skills Survey 2017

When asked to specify the job roles they had difficulties recruiting into as part of our recent survey (DESS 2020), employers most commonly cited:

- **Manufacturing / engineering** roles (various, cited by 25 of 103 respondents reporting hard-to-fill vacancies)
- **Sales and marketing roles** e.g. business development managers, account managers, PR, Digital marketing (cited by 21 respondents)
- **Human health and social care roles** such as youth, social workers, counsellors, well-being coaches (cited by 21 respondents). Unsociable hours and own transport particular cited as issues when recruiting care staff
- **Chefs and other hospitality** roles such as waiting and front-of-house staff (cited by 12 of 103)
- **Professional services roles -** accounting / finance (4) and legal roles (3). (cited by 4 of 103)

Most commonly, employers attributed these hard-to-fill vacancies to low number of applicants with the required **skills** (37%), closely followed by low number of applicants with the required **attitude, motivation or personality** (33%) and work experience (27%).

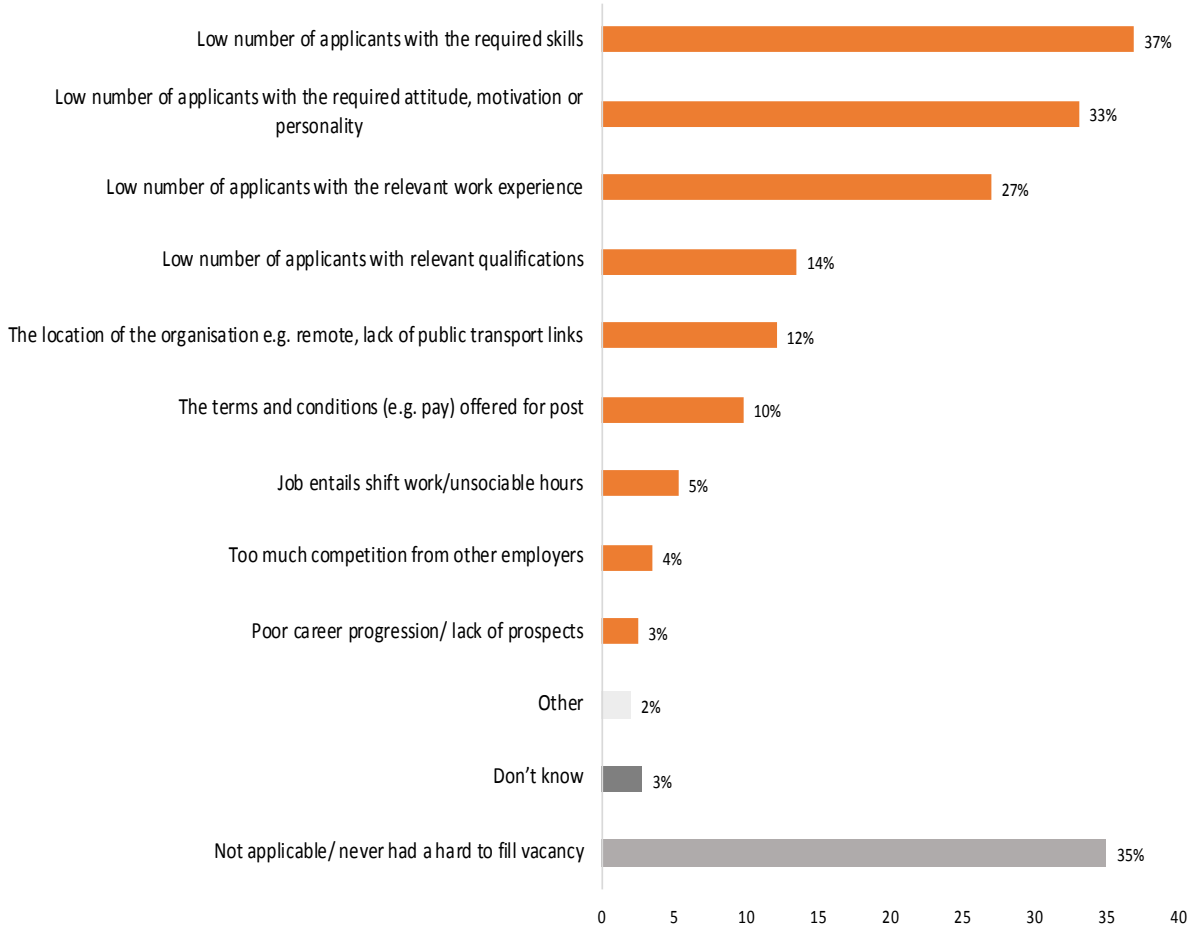


Figure 94. Typical causes of hard to fill vacancies (n=242). Dorset 2020 Employer Skills Survey

As shown in Figure 95 Skills Shortage Vacancies appear to be a particular problem within certain industries (ESS 2017):

- **Construction** - two-thirds of all vacancies were due to skills shortages (68%)
- **Transport** (53% of vacancies)
- **Utilities** (43% of vacancies)

As well as presenting issues in terms of recruitment, a high proportion of SSV's may also present problems in terms of retaining skilled staff. The demand for these skilled workers is high and they are able to move between employers – often influenced by the terms and conditions (wages) on offer. Thus, creating competition between businesses.

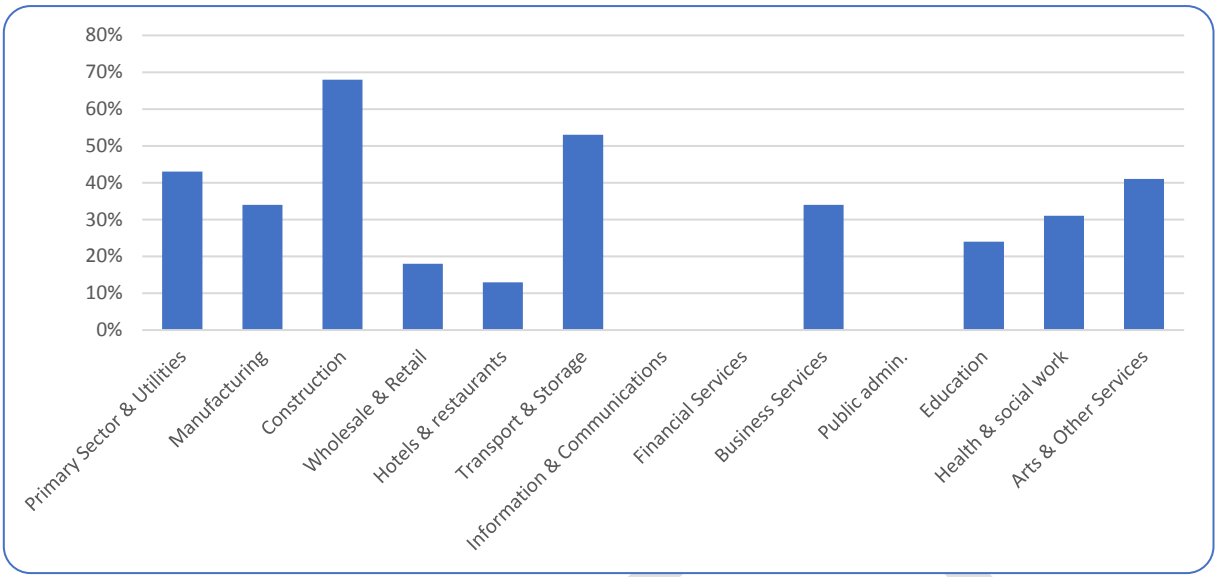


Figure 95. Skills Shortage Vacancies as a proportion (%) of all vacancies – broad sectors (DLEP). Employers Skills Survey 2017. Note. For those sectors which show a 'nil value' in the below chart, this is due to relatively few responses and the data has been supressed for confidentiality reasons.

In terms of the scale/volume of vacancies, the sectors that appear to have a relatively large proportion of ongoing vacancies (ESS2017):

- **ICT - 7%** of total job roles were vacant
- **Health & Social work (6%).**
- **Hotels & Restaurants (6%)**

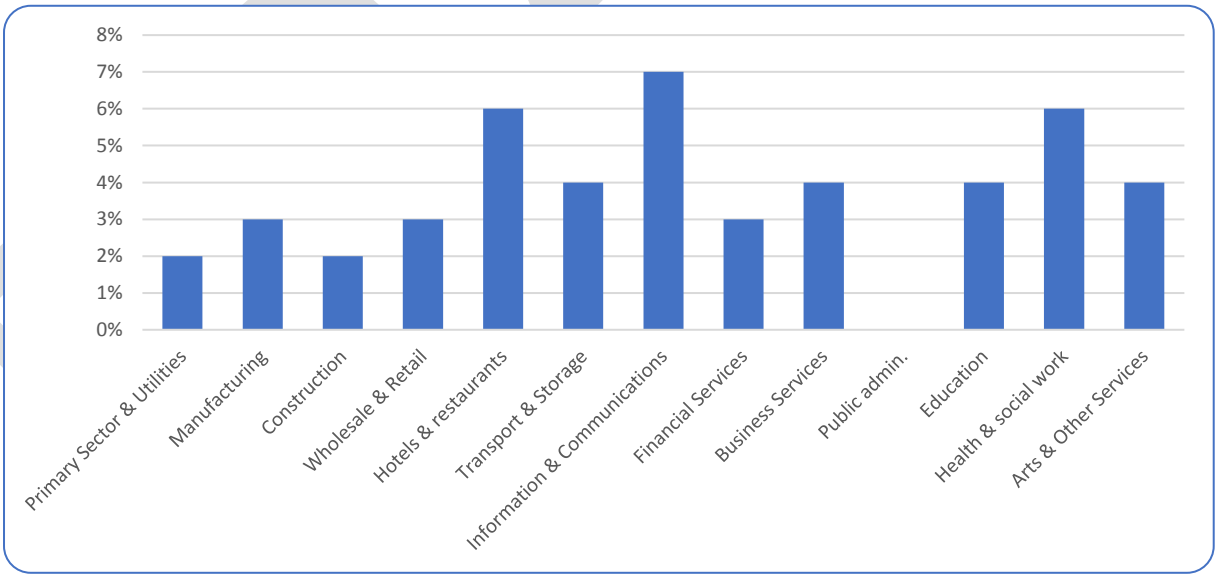


Figure 96. Vacancies as a proportion (%) of total employment – broad sectors (DLEP). Employers Skills Survey 2017

Over half of the employers in Dorset had some recruitment concerns, the biggest ones related to their existing employee age profiles –reaching retirement (17%), and their location (16%) (DESS 2020).

Figure 97. Concerns about recruitment selected by employers (n=242). Dorset 2020 Employer Skills Survey

Ageing workforce

17% of employers cited an ageing workforce as a recruitment concern. Within this group there is disproportionately high representation of employers from sectors with a lot of manual roles - agriculture, forestry and fishing sector, human health and social work and manufacturing sectors.

Further verbatim feedback regarding aging workforce concerns fell into one of the following scenarios:

- **Losing valuable skills** that may be difficult to replace (cited by 20 of 54)
- **Lack of the right skills mix amongst older employees** - IT literacy / digital skills and the physical aspects of some roles in sectors such as construction, manufacturing and care. (cited by 19 of 54)
- **Unavailability of a like for like replacement** - perceptions that younger people coming through the education system are not well educated or have the right attitude / career mentality to replace existing employees that are due to retire (cited by 16 of 54)
- **Lack of succession plan** - small businesses where the owners and / or managers are close to retirement age, and the employer has not yet looked at (or does not know where to start with) succession planning. (cited by 6 of 54)

Two respondents commented that they will have either to scale down their business or close it entirely – suggesting that for a small number of businesses the age of their workforce presents

some significant questions in terms of continuity. We would expect this to be related to issues of succession. One further respondent commented they will look into apprenticeships and one would consider automation. The measures employers were planning to alleviate these concerns are illustrated in Figure 98.

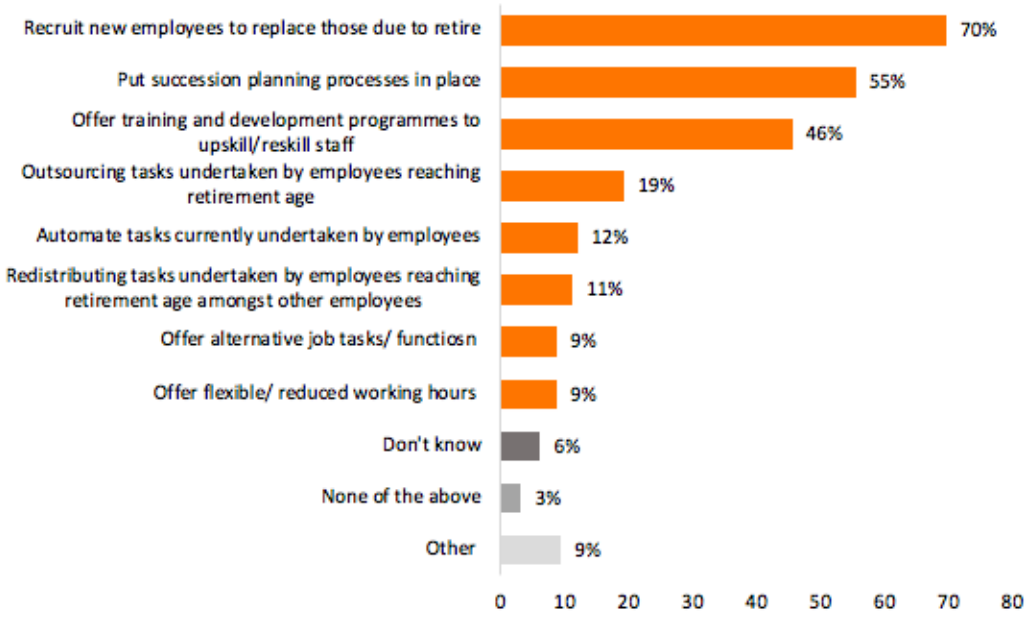


Figure 98. Concerns about ageing workforce (n=54). Dorset 2020 Employer Skills Survey

Organisation's location

Concerns raised by a small number of employers related to:

- The inability of locally based businesses to compete with London and other major UK cities in terms of what it offers (cited by five respondents).
- The "wide geographic spread of the county" and "poor public transport" meaning that "employees usually require their own transport" to commute to their workplace and / or travel for work where required (cited by 13 employers – both in Dorset and BCP areas.)
- Dorset being an expensive area to live (cited by three employers).

Under-utilisation of existing skills

A disproportionate number of large businesses selected this recruitment concern (20% of employers with more than 250 employees compared to 3% of employers with less than 250 employee). Some respondents were aware of under-utilisation of existing skills; for example, one respondent explained that they believe they recently lost an employee to another organisation that offered a higher salary as they were able to better utilise the employee's skill set.

Comments made by several respondents imply that they do not know whether or how they may be under-utilising skills, but recognise that they could potentially be missing out on opportunities.

Diverse / all-inclusive workforce

This concern appears to be more prevalent in large employers (who may be more likely to have an equal opportunities policy in place), and three employers in the manufacturing and ICT sectors that specifically cited concerns around recruiting women. Most respondents selecting this concern explained that they do not feel they are able to secure a diverse workforce because they do not get applicants from particular groups. For example, respondents mentioned:

- As already noted, issues attracting female employees in some sectors (cited by manufacturing, engineering and ICT respondents specifically).
- The population of Dorset not being very ethnically diverse and this tending to be reflected in the applicant / candidate pool.
- A lack of applicants with a disability applying for jobs.

Effects of Brexit

Employers that cited the effects of Brexit as a concern come from a range of sectors. Large employers were more likely to cite this concern than smaller employers, as were employers based in the BCP area compared with the Dorset area. Responses of those seeing the effects of Brexit as a concern for their recruitment covered the following:

- Existing European employees that have already relocated or are planning to relocate. One respondent commented that they have set up a new office in Spain for an employee that has relocated. Other respondents are concerned about how they will replace these employees. This concern was cited particularly by respondents from the care, hospitality and construction sectors. (cited by 21 employers of the 42 who selected Brexit as a recruitment concern).
- A significant proportion of employees in the hospitality industry coming from Europe, so potentially insufficient numbers of candidates from the continent. (cited by 19 employers of the of 42 who selected Brexit as a recruitment concern)
- Uncertainty affecting the overall performance of the business, which may have an impact on the number of employees they require. (cited by 12 employers of 42 who selected Brexit as a recruitment concern)

Skills gaps

In our 2020 survey, over half of employers (56%) reported at least one type of skills gap across their existing workforce with 1 in 3 (36%) reporting multiple skill gaps (DESS 2020).

Again, this seems like an increase although not directly comparable to the results back in 2017, when 16% of respondents felt that they had at least one member of staff who was not fully proficient. It was estimated that overall, 6% of those employed were not fully proficient i.e. had some form of skills gap, higher than the levels seen nationally (ESS 2017).

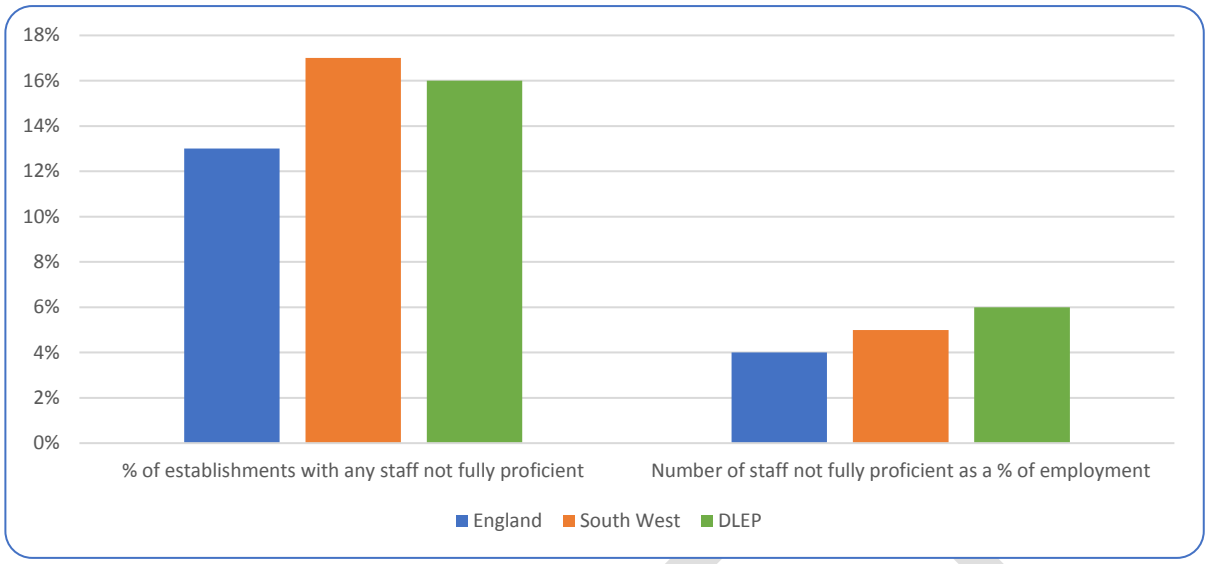


Figure 99. Proportion (%) of businesses with gaps in staff proficiency. Employers Skills Survey 2017

According to our latest survey results, the skills gaps most commonly experienced were in **Digital, Sales and Marketing, Analytical, Leadership and Management skills.** This is broadly in line with our findings on the most sought after skills seen in advertised vacancies, as seen in the previous section.

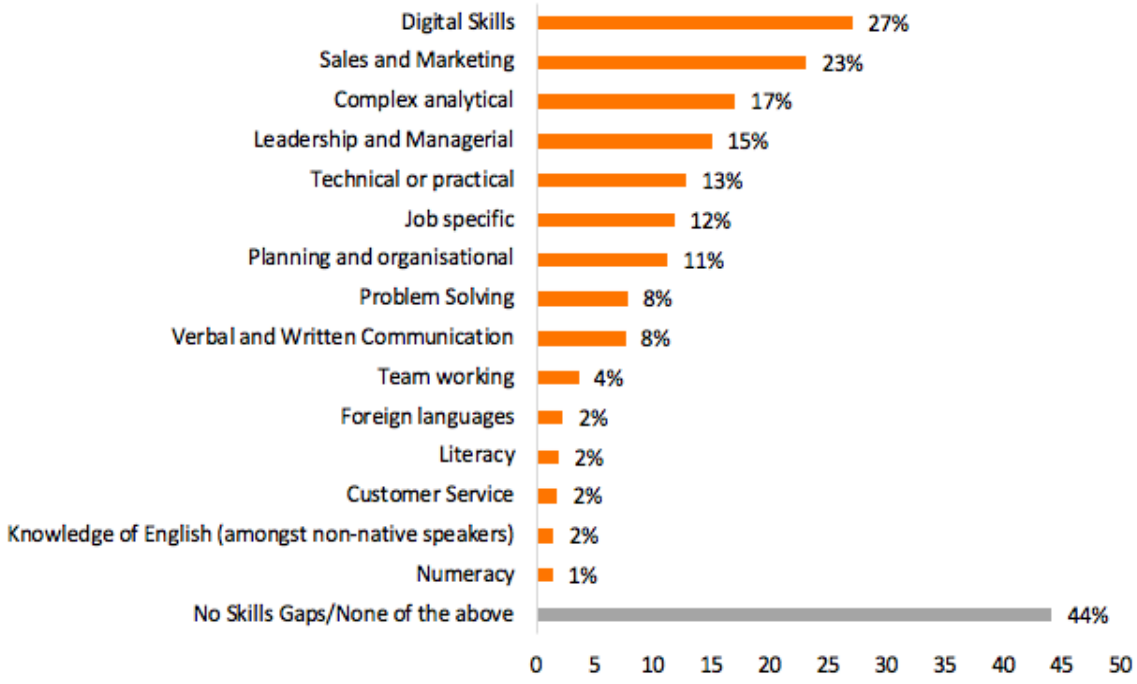


Figure 100. Skills gaps reported by employers (n=242). Dorset 2020 Employer Skills Survey

In terms of sector, employers in the professional, scientific and technical services and administration and support services were most likely to report a skills gap. Employers in the construction, wholesale and retail, and real estate were least likely to report a skills gap.

Where reported, **'job specific'** skills gaps are grouped below:

- **Engineering** (11 of 43 respondents)– a wide range of areas such as such "systems engineering", "technical engineering", and the manufacture of motor vehicles.
- **Health and social care** (9 of 43 respondents)– respondents cited skills gaps relating to the following job roles; care assistants, physiotherapists, and counsellors for adults and children
- **Finance** (6 of 43 respondents)– accountancy, tax advice, financial management and financial planning.
- **Construction** (4 of 43 respondents)– gaps in the following specific trades; plumbing, electrical work and carpentry.
- **Fundraising** (3 of 43 respondents)– this was cited by organisations in the third sector, but no further elaboration was provided by respondents.
- **Legal skills** (2 of 43 respondents)– cited by a handful of respondents who did not expand on their response any further.

Many skills gaps (digital, sales, marketing, leadership and managerial, technical and practical, teamworking, customer service, communication, job specific and numeracy) were cited across businesses. However, there were skills gaps reported predominantly within certain business sectors:

- **Complex analytical –** Finance and insurance, arts and entertainment, ICT, manufacturing, professional, scientific and technical services
- **Planning or organisational –** Manufacturing, arts, entertainment, recreational services and ICT
- **Problem solving –** Manufacturing and finance / insurance sectors.

Further exploration on the types of Digital and Technical skills gaps showed that the digital skill most frequently selected as lacking by employers is **digital marketing** (20% of all respondents), followed by **data analysis** and **CRM.**

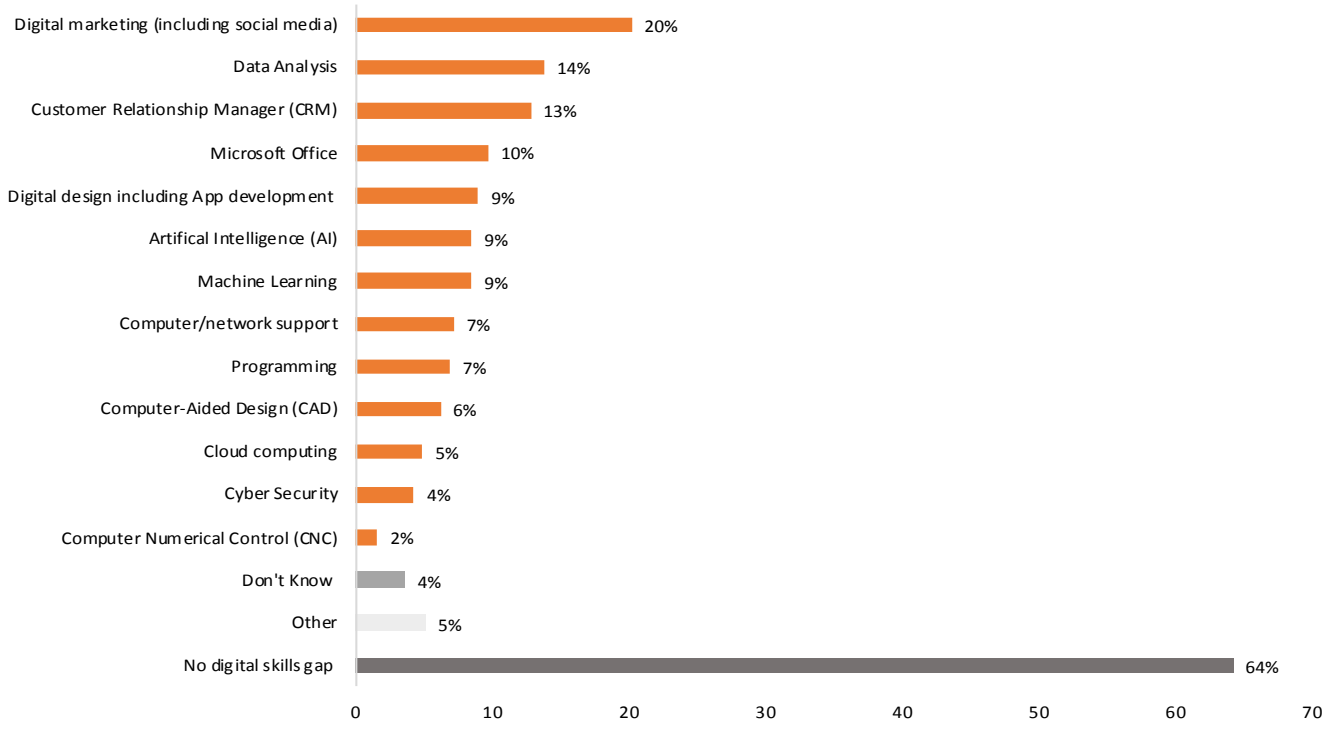


Figure 101. Types of digital skills gaps in current workforce (n=242). Dorset 2020 Employer Skills Survey

Employers reporting skills gaps believe these have implications on business growth and productivity.

Respondents that had skills gaps selected those amongst them they felt had biggest impact on performance / productivity. Figure 102 shows, for each skills gap reported, the proportion of the respondents reporting it who then selected it as one of their biggest. For example, out of the respondents choosing 'job specific skills' as a gap (12%, see Figure 100), 87% reported it as one of the top three gaps impacting their organisation's performance.

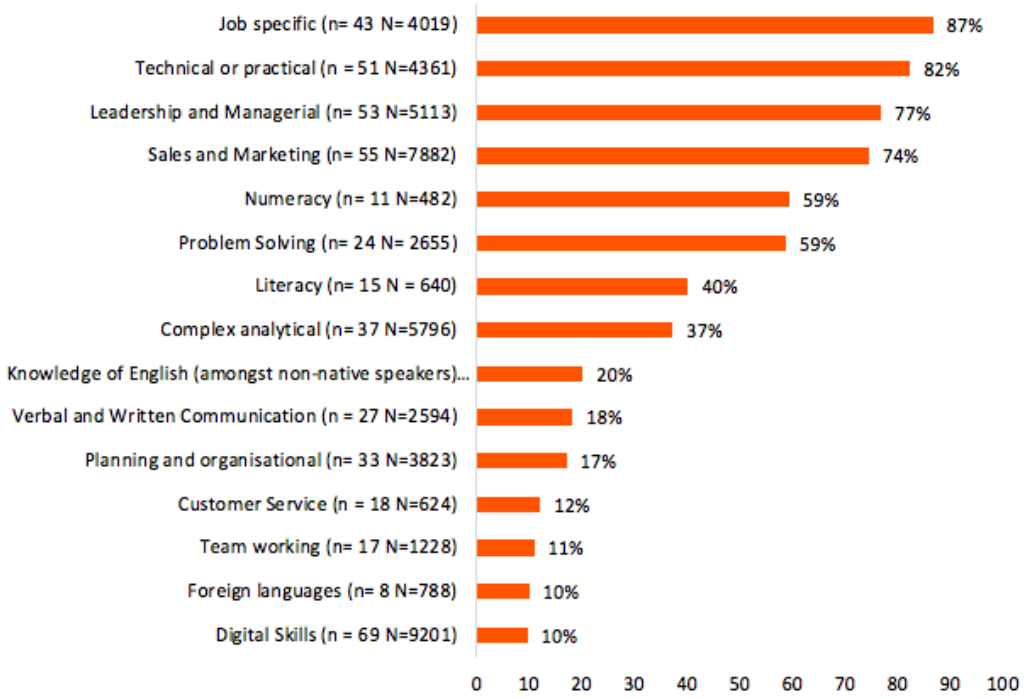


Figure 102. Skills gaps with biggest impact on the organisation. Dorset 2020 Employer Skills Survey. *Note. As responses were weighted to the population of Dorset on the basis of organisational sector and size n=number of respondents, N=number of businesses they are representing*

Aside from **job-specific skills**, the gaps having the biggest impact on the organisational performance and productivity were **technical or practical, leadership and managerial and sales and marketing**.

All respondents reporting at least one skills gap were asked to rate (on a scale of one to five) the extent to which the gap(s) are having effect. Results shown in Figure 103 demonstrate that **all skills gaps are having impact, most notably on growth, productivity, and profitability.**

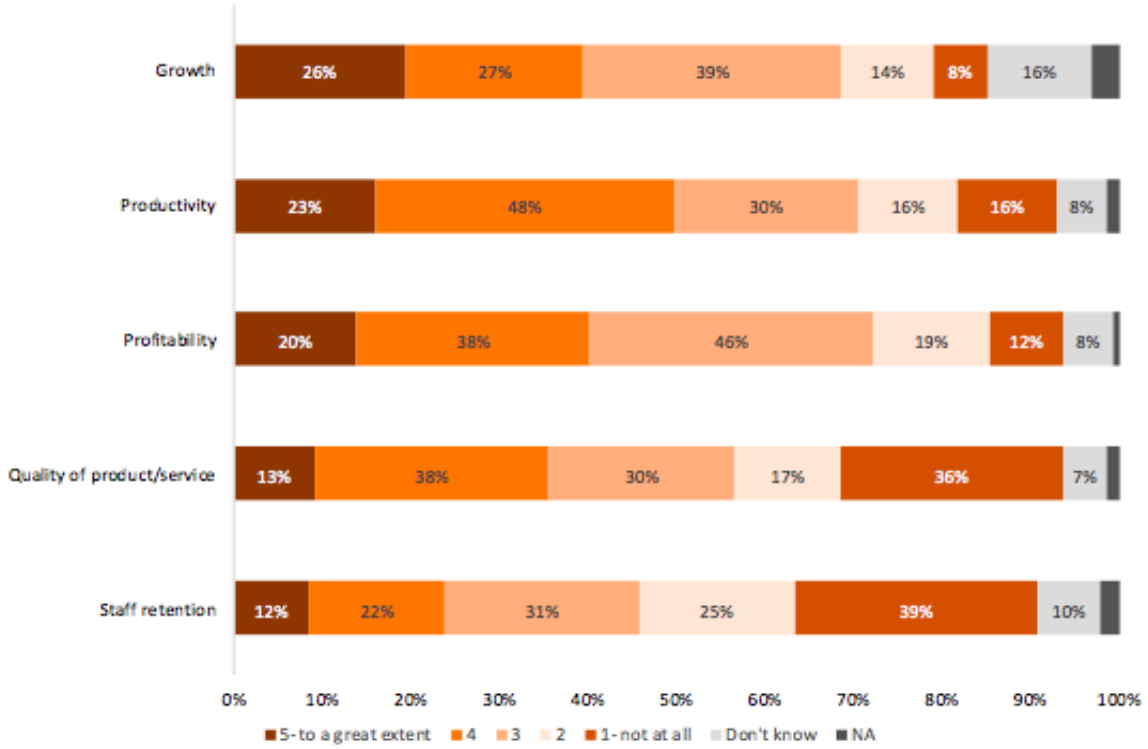


Figure 103. Employers views on the impact of skills gaps on KPIs. Dorset 2020 Employer Skills Survey

Among the main causes of skills gaps, insufficient training budget and / or low number of applicants appear to be behind the majority of these skills gaps. However, almost half of employers (46%) that cited a gap in digital skills felt that this was because there was a lack of appropriate training courses

Underutilisation of Skills

On the opposite side of the issue, and cited above as a recruitment concern in our 2020 survey, within the Employer Skills Survey 2017 it was evident there is also a considerable proportion of staff who employers feel are 'underutilised' (Figure 104).

Broadly one-third (32%) of employers who responded felt they had underutilised staff (compared to 37% in the South West and 34% in England). The 'underutilisation' of staff appears to be more marked in certain sectors. This includes hotels & restaurants (63%) and perhaps more surprisingly education (53%).

There appears to be a dichotomy between some businesses reporting quite significant skill gaps/shortages, whilst others (or maybe even the same business but for different roles) feel that current staff are not utilising their skills/experience to full capacity.

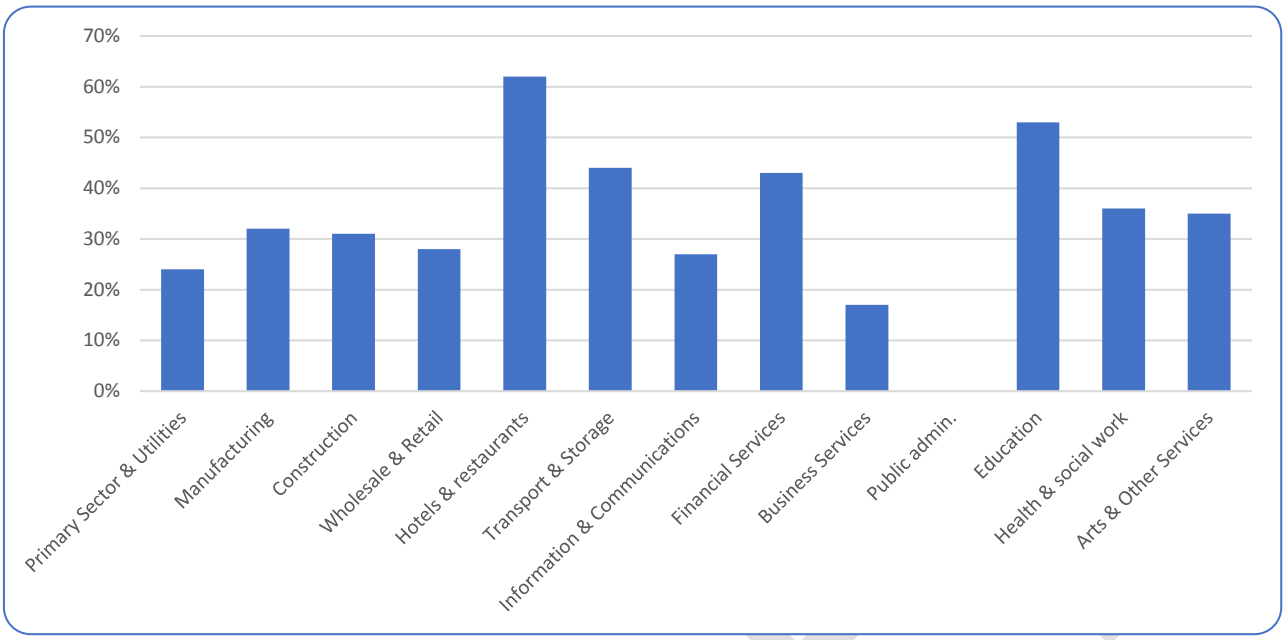


Figure 104. Proportion (%) of all establishments with underutilised staff – broad sectors (DLEP). Employers Skills Survey 2017

Training provision

Within the Dorset 2020 Employer Skills Survey, the vast majority (83%) of employers say they have taken action in the last 12 months to upskill existing employees. This compares to the Employer Skills Survey 2017 results when broadly two-thirds of those who responded provided some form of staff training.

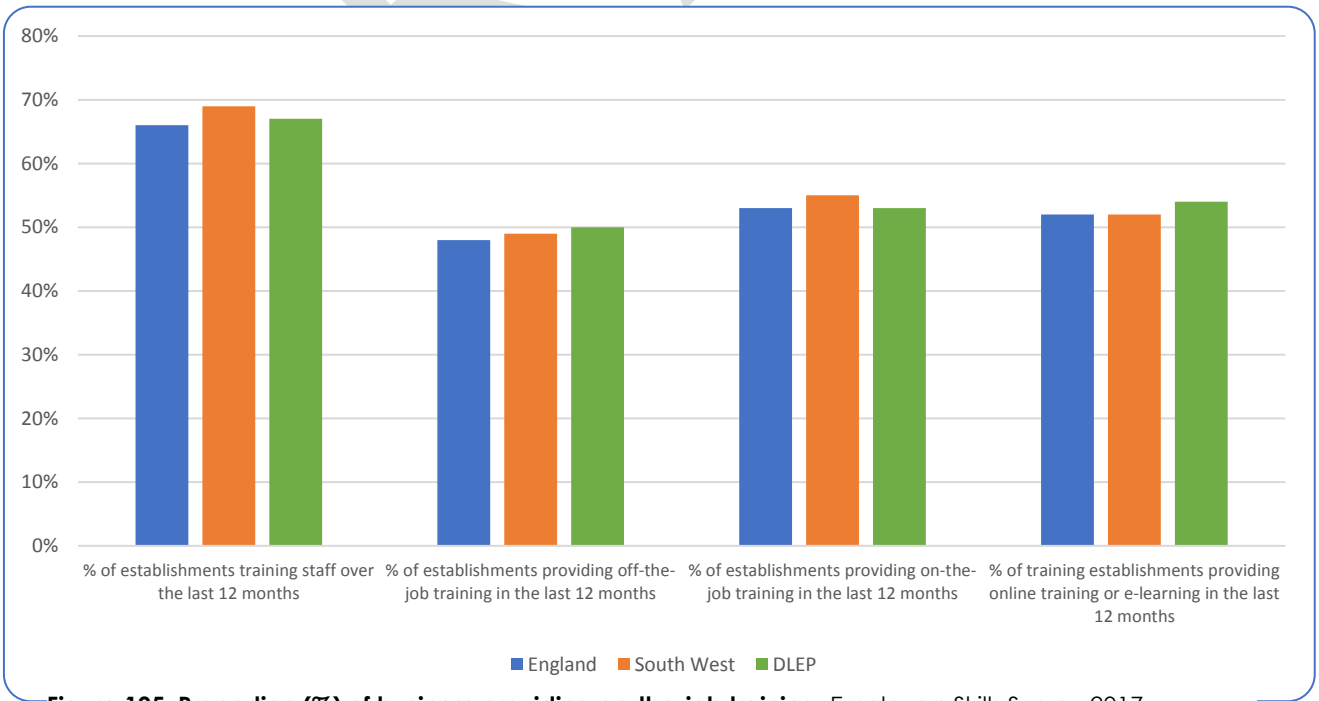


Figure 105. Proportion (%) of business providing on-the-job training. Employers Skills Survey 2017

In comparison in 2020 two thirds of employers reported to have offered in-house training; a slightly lower proportion have engaged with external training providers and the majority (82%) say they are likely to take action to upskill their employees in the future. The main improvements to training provision in Dorset that employers would like to see relate to accessibility (location of training provision), funding towards the cost of training and more relevance of content to small businesses. It could be argued that this broadly corroborates some of the earlier issues identified – that of accessibility to training and the changes in eligibility of adult learning which have cut funding for many learners. The employer survey has been useful to also understand the issue from the employers' perspective.

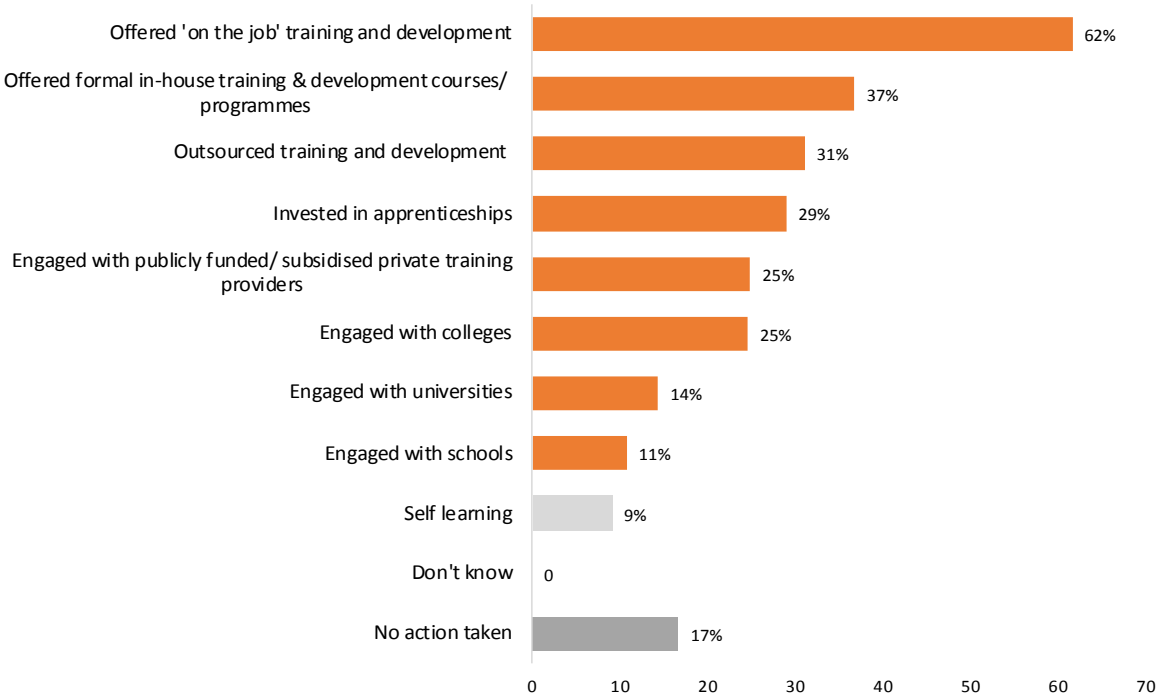


Figure 106. Actions taken to increase skills in existing workforce (n=242). Dorset 2020 Employer Skills Survey

The majority of employers (82%) said they would be likely or very likely to take one or more actions in the future to upskill their existing staff. They were most likely to provide in-house training and when engaging with training providers they tend to prefer private training providers and colleges when comparing with other educational institutions (Figure 107).

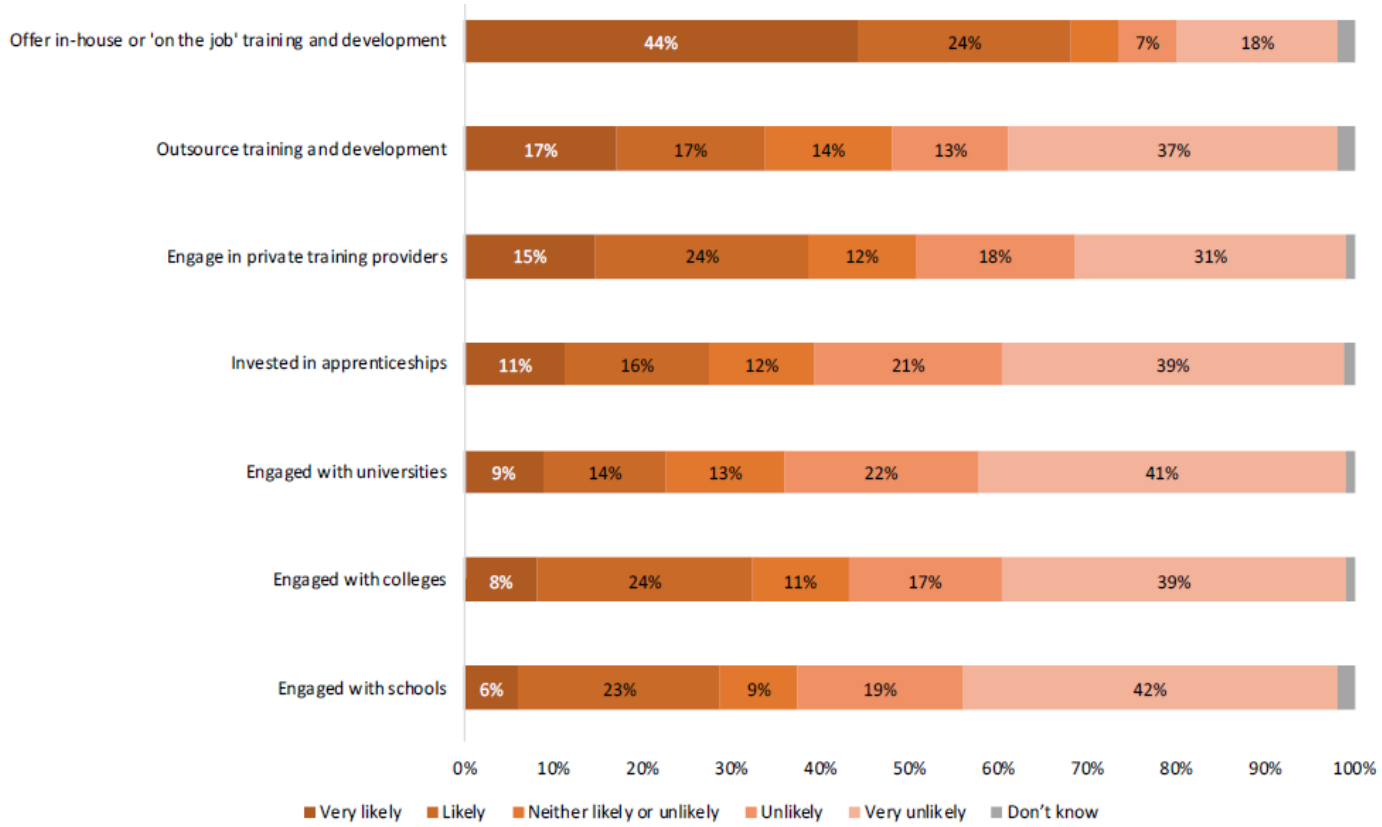


Figure 107. Likelihood of employers taking action to upskill employees in the future (n=242). Dorset 2020 Employer Skills Survey

Apprenticeships

A majority of respondents reported a good understanding of apprenticeships (process, benefits etc.). However, a sizeable proportion (35%) acknowledge that they do not have a good understanding of what an apprenticeship is and many are unsure if apprenticeships would be suitable for their organisation's typical type of work.

Just 8% of employers in Dorset who responded to the survey currently employ an apprentice, but over half of employers say they would consider offering apprenticeship opportunities in the future.

Future skills

One third of respondents thought their orgainsation's skills needs will change in the next three to five years. Amongst this group, the skills most commonly anticipated to be required are **teamworking, problem solving and sales and marketing** which very closely reflects the currently most sought-after skills in the advertised vacancies seen in the Skills and Qualifications Demand section.

Whilst most respondents felt their organisation has the appropriate skills to embrace automation and digitalisation, around a quarter feel that they do not. **Two thirds of employers envisage at least some (further) automation in their workplace**; although most do not think it will impact their existing workforce in terms of number of employees or the type of job roles required.

Just under half of respondents (48%) felt the local training provision in Dorset could be improved.
A number of themes emerged from their comments:

- **Improved accessibility and relevance –**more 'local', more sector-specific (e.g. for the creative and digital sectors), stronger relevance to small businesses, greater opportunities for adults (25+)
- **Funding for training –** more subsidised training, clearer information about external funding
- **More focus in education and training on preparing young people for work;** "working in complex environments" and "workplace attitude" were specifics suggested by respondents.
- **Improved visibility and information of training available in the county.** Suggestions on signposting and county-wide training directory
- **Improving apprenticeships;** specific suggestions were to enable apprentices to go 'on loan' to other industries to gain wider experience, and removing the Apprenticeship Levy (instead offering tax relief to employers to train school leavers).

Supply of Labour and Skills

Discussion points

- Skills and qualifications profile of people in Dorset
- School, FE and HE training provision on offer
- Achievement and attainment levels of young people

This section of the report focuses principally on the supply of skills and qualifications using two broad sources for the information:

- Published and accessible data – much of which highlighted in the Skills Advisory Panel Toolkit
- Data that has been provided directly by skills and learning providers

In terms of the 'quality' of the current and potential workforce within the Dorset LEP labour market, it is important to understand the current skills base – as measured by qualification levels (again recognising that can only act as a proxy for skills attainment).

Qualifications

The qualification levels of those currently in employment can be regarded as one indicator for future demand so we look at these first.

We already noted in the Skills and Qualifications Demand section that formal qualifications have been on the rise over the current decade. Projections of the workforce qualification profile (Figure 87 and Figure 88) estimate that by 2027, over half (55%) of those employed in Dorset will be qualified at or above Level 4, whilst the those with Level 1 or no formal qualifications are expected to fall in proportions from 15% to 8%. Furthermore, according to these projections, 88% of the total net labour demand (between 2017 and 2027) could require higher qualifications (Level 4+). In that sense, it is important to understand the extent to which the people in Dorset are prepared for these shifts in the workforce demand expected in the future.

In general, Dorset has followed the trend of increase in achievement of higher-level qualifications over the past decade (as illustrated in Figure 108). The biggest increase since 2010 was in the proportion of people qualified at Level 3 and above (9.3 percentage points) followed by those at Level 4 and above (8 percentage points). Over the same period, those working-age people with no qualifications has fallen (by 2.3 percentage points).

Both occurrences (more people with higher-level qualifications and fewer with no qualifications) could be seen as significant structural change taking place in a relatively short space of time.

Still a fifth of the working age population (23%) does not have a Level 2 qualification, which is regarded a benchmark for employability[52].

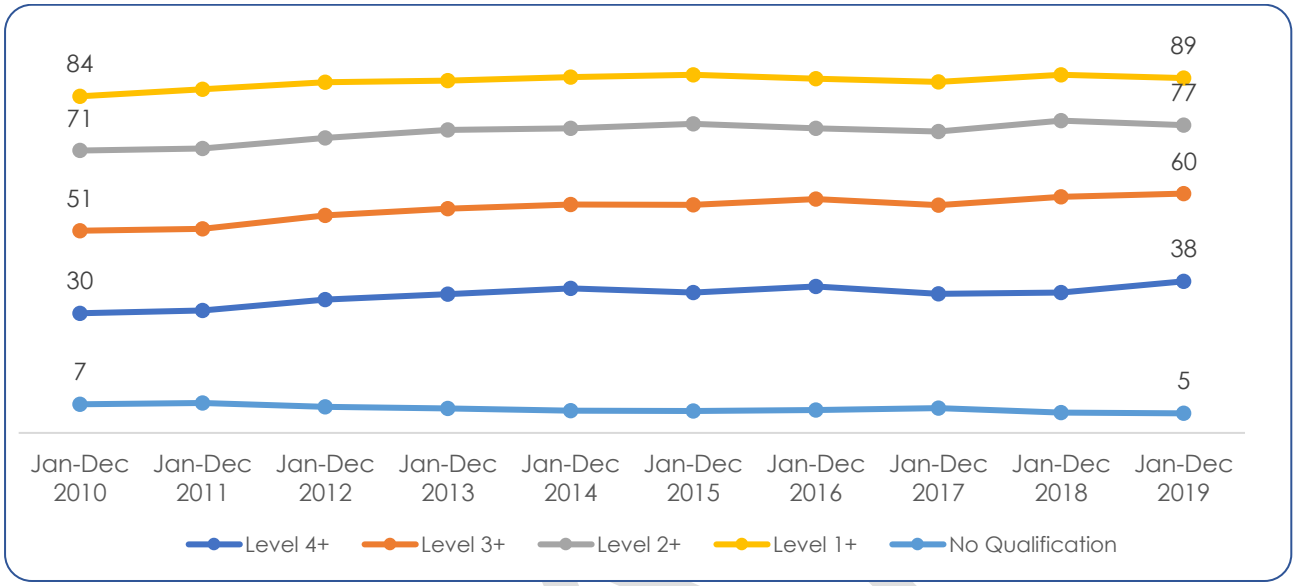


Figure 108. Proportion (%) population (aged 16-64) – qualification level (DLEP). Annual Population Survey, ONS

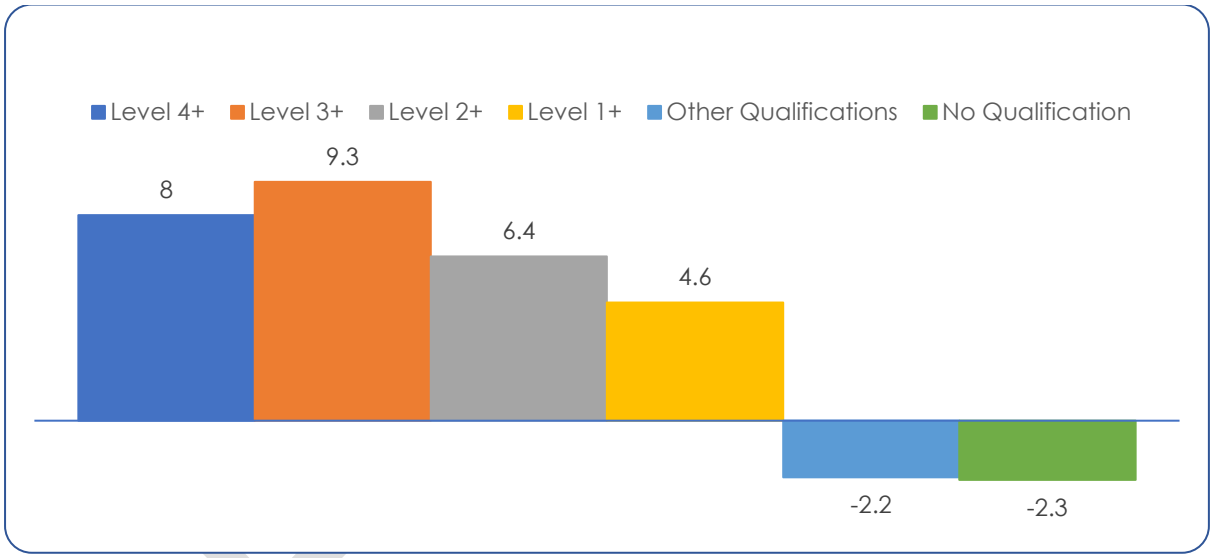


Figure 109. Percentage point change (2010 – 2019) – qualifications - population aged 16-64 (DLEP). **Annual Population Survey – ONS**

Moreover, as we have already established in the Skills and Qualifications Demand section (Figure 86), while a higher proportion of workforce population in Dorset is qualified to Level 1, 2 and 3, and lower proportion (4.9%) holds no qualifications, those qualified to Level 4 and above (Figure 110) were lower in proportional terms when compared to national figures.

[52] "A good pass at GCSE is considered a critical benchmark in employment terms" - Level 2 study programmes. Ofsted, 2018

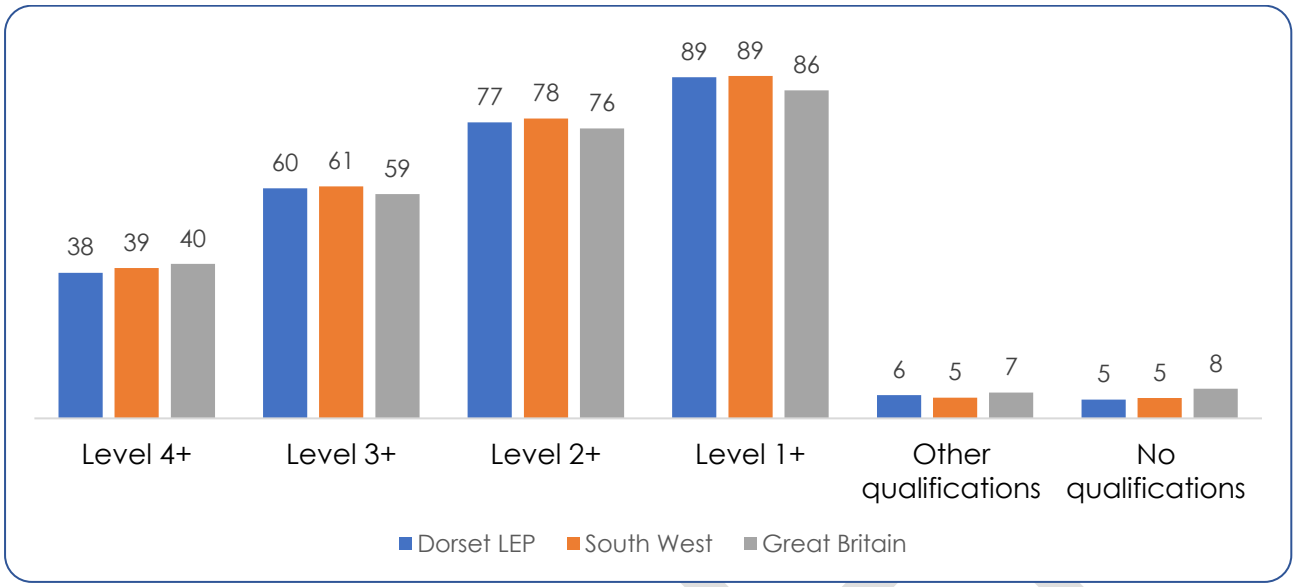


Figure 110. Proportion (%) workforce population (aged 16-64) – qualification level comparison (Jan - Dec 2019). Annual Population Survey, ONS

A comparison with national trends of qualifications Level 4 and higher achievement movements shows the national trend was consistently upward while the progress towards higher-level qualifications in Dorset has been slower over the recent years (Figure 111). Since 2014, when the national average was exceeded with 0.5 percentage points, Dorset has fallen behind, reaching a gap of 3.8 percentage points in 2018, and catching up in 2019 to decrease the gap to 2.3 p.p.
Some areas have also seen a drop in the proportion of NVQ4+ qualified people (Figure 118) which is in contrast with the projections of future demand.

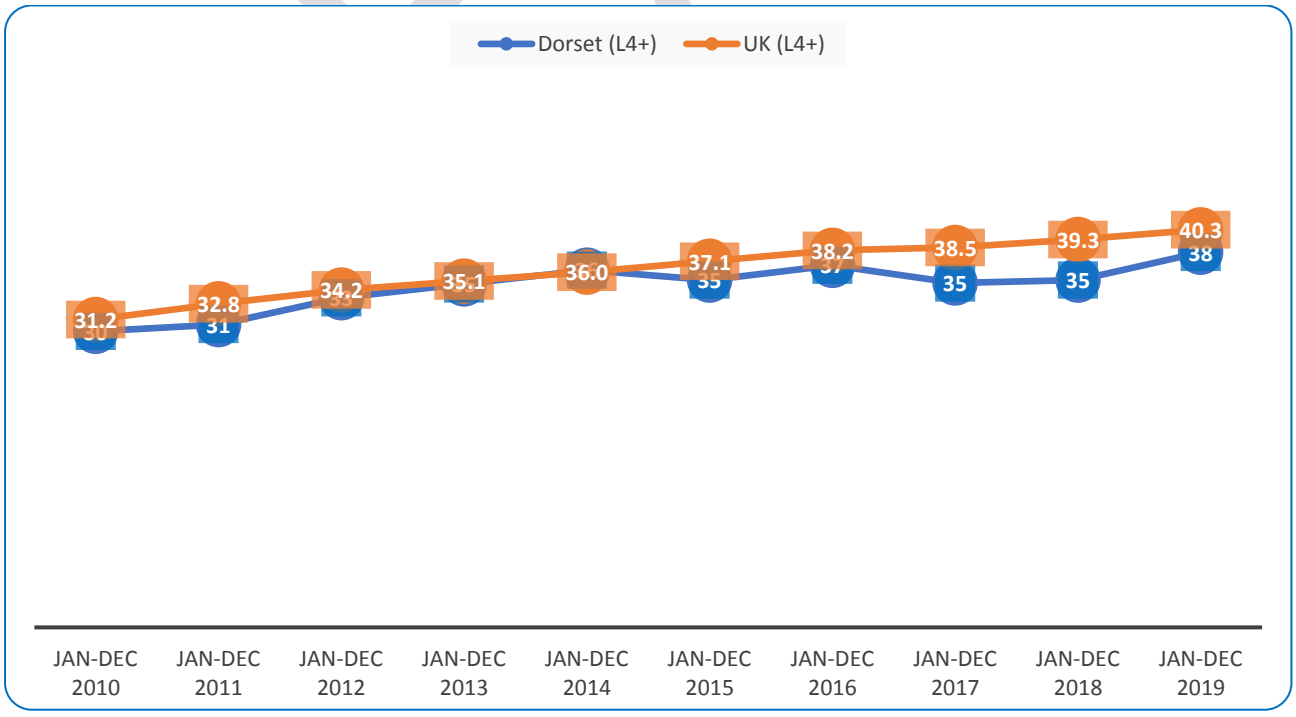


Figure 111. Proportion (%) population aged 16-64 – qualification level 4+ (DLEP vs England). Annual Population Survey – ONS

In general it doesn't necessarily detract from the broad story of a general upskilling (as measured by qualification level) within the DLEP labour force.
The following charts provide further insight into the changes in qualification levels occurring since 2010. The largest percentage point change in the proportion of people holding a NVQ4+ level qualification occurs in those aged 30-49. On initial view, this is perhaps a surprising occurrence. One explanation is that this is simply the consequence of the initial expansion seen in HE participation working through the 'ageing' process i.e. those people who were part of the large increase in university participation that occurred in 90s/00s are reflected in these age bands.

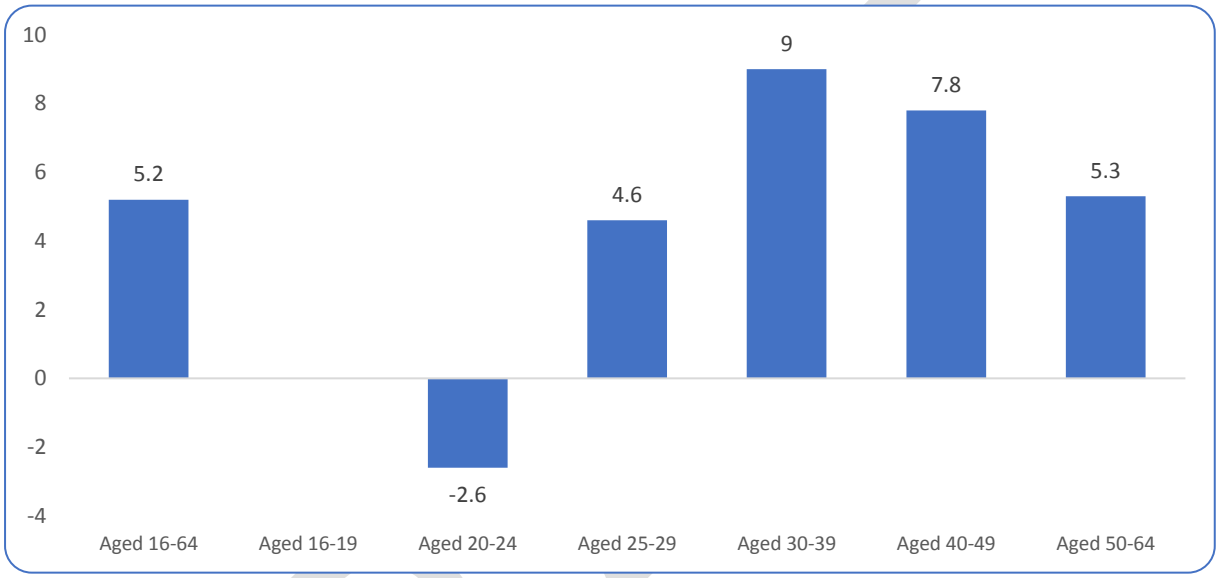


Figure 112. Percentage point change (2010 – 2018) – population qualified to NVQ4+ (DLEP). Annual Population Survey – ONS

Each of the changes in the proportion of the population with NVQ3 only, NVQ2 only and NVQ1 only are shown in the following charts. The significant increase in the proportions holding NVQ3 and NVQ2 also illustrate the expansion of participation in Further Education.

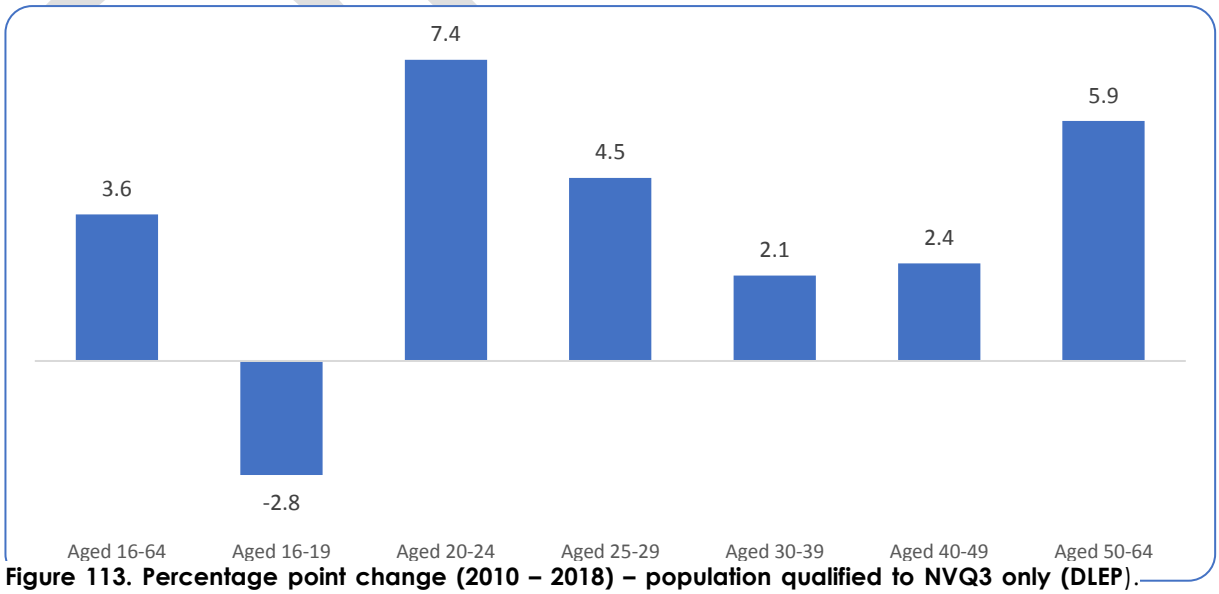


Figure 113. Percentage point change (2010 – 2018) – population qualified to NVQ3 only (DLEP). Annual Population Survey – ONS

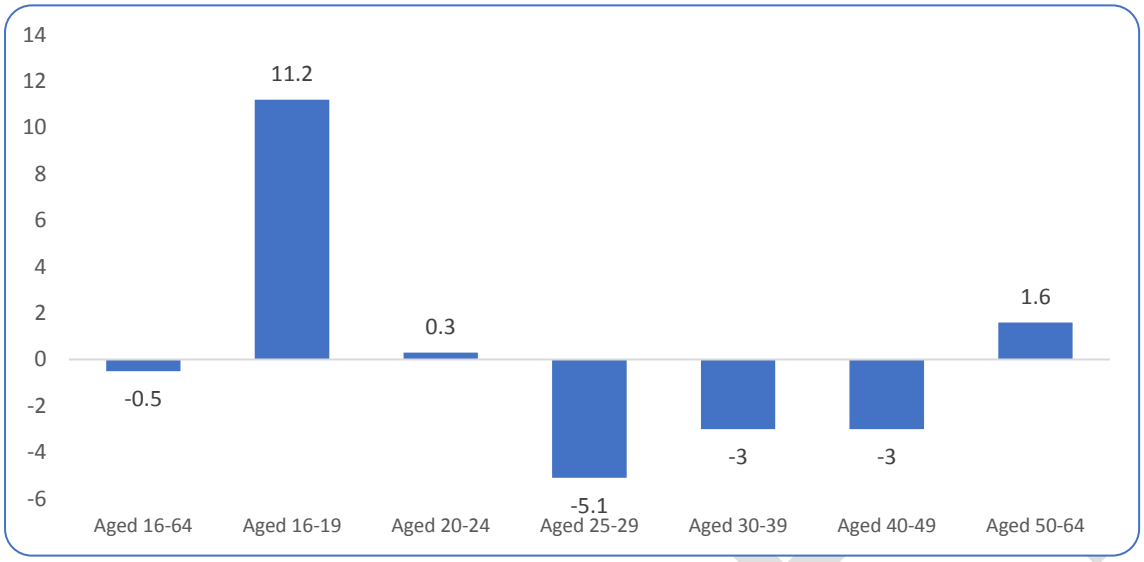


Figure 114. Percentage point change (2010 – 2018) – population qualified to NVQ2 only. Annual Population Survey – ONS

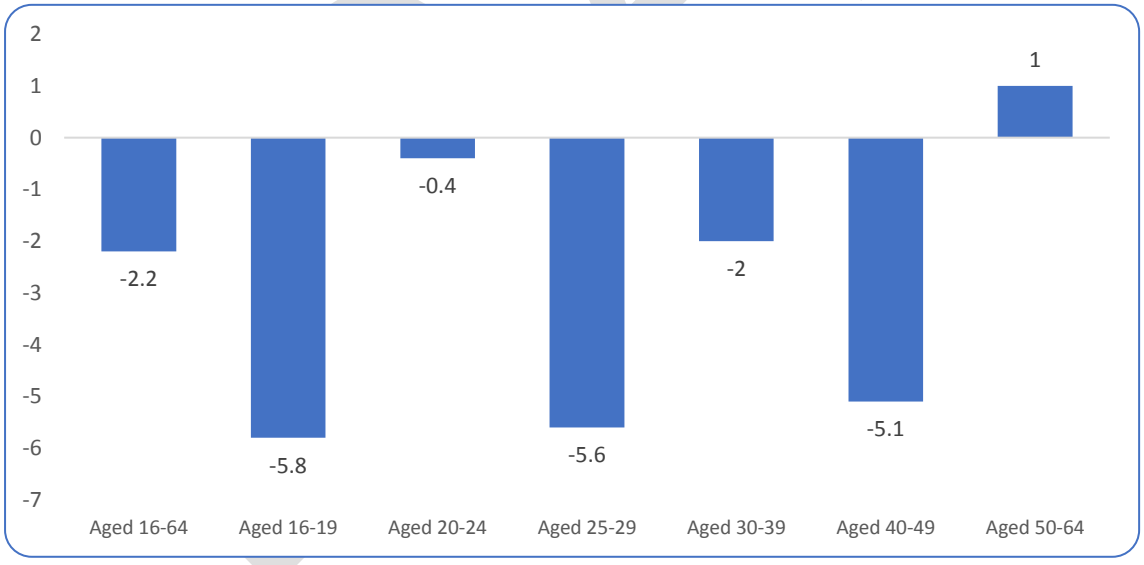


Figure 115. Percentage point change (2010 – 2018) – population qualified to NVQ1 only. Annual Population Survey – ONS

Figure 116 further illustrates the significant fall in the proportion of the working-age population in the DLEP area that holds no qualifications. As shown previously, overall this has fallen by 2.3 percentage points since 2010. However, in those aged 50-64 this fell by 7.1 percentage points. This change could either be as a result of skills acquisition i.e. those individuals undertaking some form of qualifications-based training, or the demographic 'wave' i.e. the individuals who had achieved this minimum qualification level have 'aged' into this age bracket. It is difficult to evaluate which effects have had the largest impact.

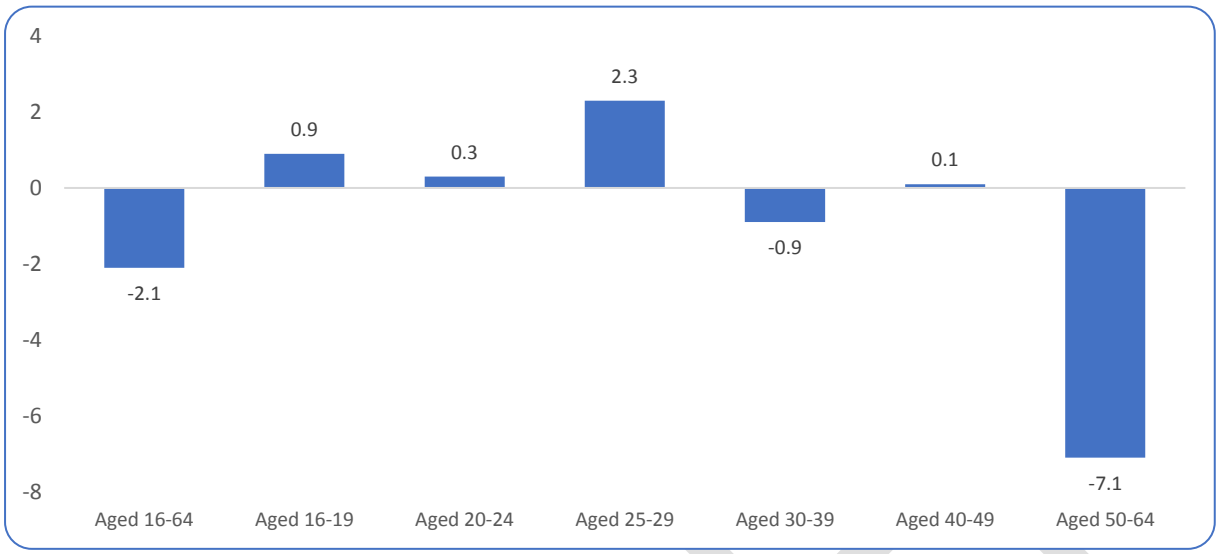


Figure 116. Percentage point change (2010 – 2018) – population with no qualifications. Annual Population Survey – ONS

The qualifications data is presented at a lower geography in Figure 117, illustrating the percentage point change in the BCP and Dorset Council areas. It shows that the proportional increase in the working-age population with higher qualifications has tended to be higher in BCP than in the Dorset Council area. A similar effect has also occurred at NVQ2 only.

This probably reflects the presence of the larger post-16 educational institutions (withstanding Weymouth College and Kingston Maurward College) within BCP and some success (see further commentary) in attracting and retaining graduates in the local community. The local universities have grown larger as HE participation increased nationally, and this is partially reflected in this general 'upskilling' in the general BCP population.

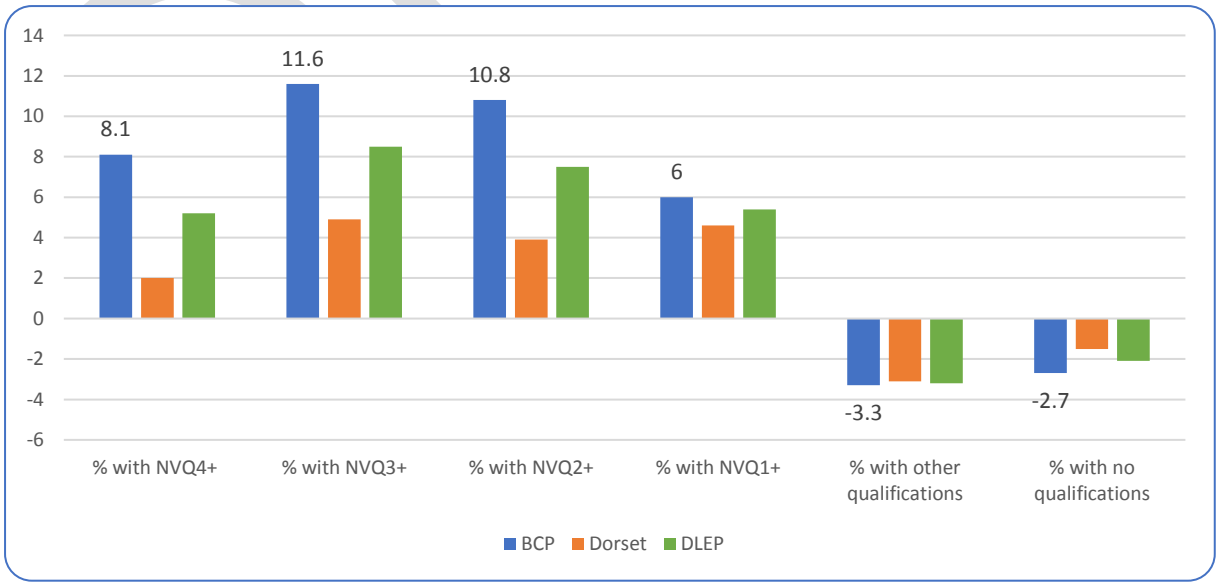


Figure 117. Percentage point change (2010 – 2018) – qualifications - population aged 16-64. Annual Population Survey – ONS

Looking at the Dorset Council area at the (old) local authority district areas indicates that divergent trends may have been experienced (although the confidence intervals associated with this survey-based data are relatively wide at this geographical breakdown which again means caution should be used in interpretation). **Contrary to national and regional trends, the proportion of working-age population with NVQ4+ qualifications actually fell in Purbeck and Weymouth & Portland**, although in the latter this is slightly countered by strong growth at NVQ3 only level – although noting the above comment around the quality/confidence of the data at lower geographies.

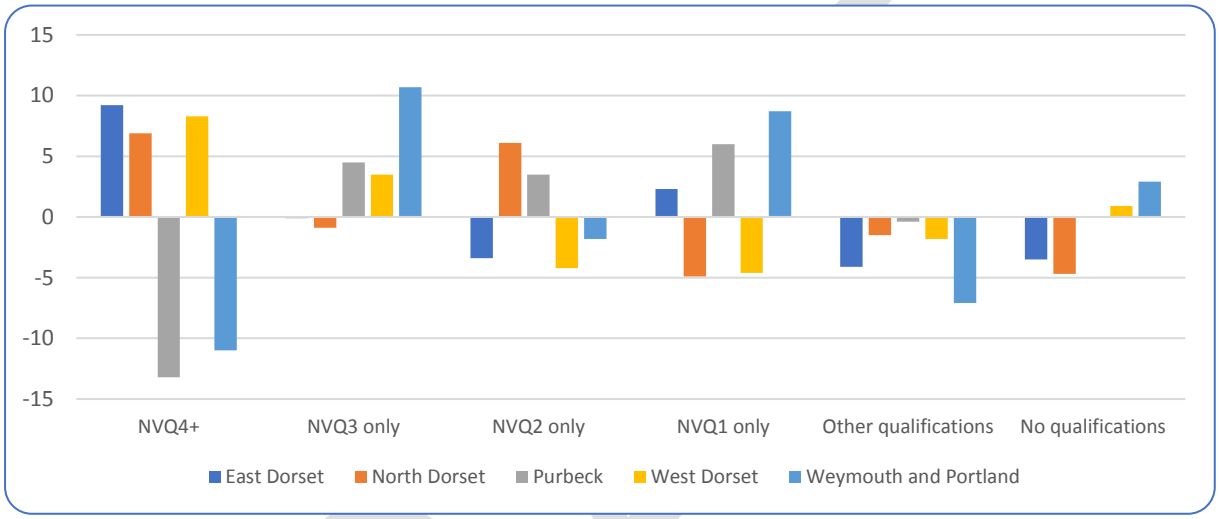


Figure 118. Percentage point change (2010 – 2018) – qualifications - population aged 16-64. Annual Population Survey – ONS

Accessibility to learning

In exploring barriers to learning, a view has been consistently emphasised by stakeholders regarding the difficulties of accessibility (particularly post-16) of learning in rural parts of Dorset. This has also been highlighted in the feedback from the Dorset 2020 Employer Skills Survey.

This has been confirmed by recent data released by DEFRA highlighting that accessibility to centres of learning is an issue for a proportion of the population. Table 26 shows the proportion of the relevant population that are within the lowest decile for these measurements of accessibility (longest 10% journey time). This can cover all forms of transport – public transport/car/walking. The table starkly illustrates the accessibility issues that face rural population in Dorset. **For example, 64% of children accessing secondary school by either public transport or walking have within the 10% longest journeys within England (data set out by Local Enterprise Partnership). Similarly, 54% of those accessing Further Education colleges are within the lowest decile in terms of journey times.** Figures are broadly similar for those accessing these learning institutions by car – with over half of the population within the lowest decile.

Table 26. Employment Centre 500 Plus (% population). DEFRA Statistics

Employment Centre 500 Plus (% population)			
Rural (public transport/walk)	**Rural (car)**	**Urban (public transport/walk)**	**Urban (car)**
53.4	50.6	1.1	1.2
Primary Schools			
Rural (public transport/walk)	**Rural (car)**	**Urban (public transport/walk)**	**Urban (car)**
49.5	26.2	18.7	19.6
Secondary Schools			
Rural (public transport/walk)	**Rural (car)**	**Urban (public transport/walk)**	**Urban (car)**
63.9	51.0	5.3	5.3
Further Education			
Rural (public transport/walk)	**Rural (car)**	**Urban (public transport/walk)**	**Urban (car)**
54.3	47.8	3.2	5.1

Schools in Dorset

Across the Dorset LEP area there are 290 schools - 238 primary, 96 secondary and 65 schools offering A Levels and/or other post 16 qualifications (location maps below). In Bournemouth and Poole there are 4 grammar/ selective schools.
In terms of funding, just over a half of the schools in Dorset LEP are academies - a larger proportion of BCP (69%), than Dorset Council schools (43%). Academies had marginally higher Ofsted scores within both local authority areas.

Table 27 Schools in Dorset LEP. National Statistics. DfE. 2018-19 -Find and compare schools in England tool

	All	*Primary*	*Secondary*	*Post 16*
Dorset	**181**	**153**	**58**	**35**
Academy	**79**	**69**	**18**	**7**
College	**2**	**-**	**-**	**2**
Independent School	**19**	**12**	**19**	**9**
Maintained School	**72**	**64**	**13**	**10**
Special School	**9**	**8**	**8**	**7**
BCP	**109**	**85**	**38**	**30**
Academy	**75**	**57**	**22**	**17**
College	**1**	**-**	**-**	**1**
Independent School	**10**	**7**	**5**	**5**
Maintained School	**14**	**12**	**2**	**2**
Special School	**9**	**9**	**9**	**5**
Dorset LEP	**290**	**238**	**96**	**65**

Figure 119. **Map of BCP schools – National Statistics, Interactive map.** Find and compare schools in England tool

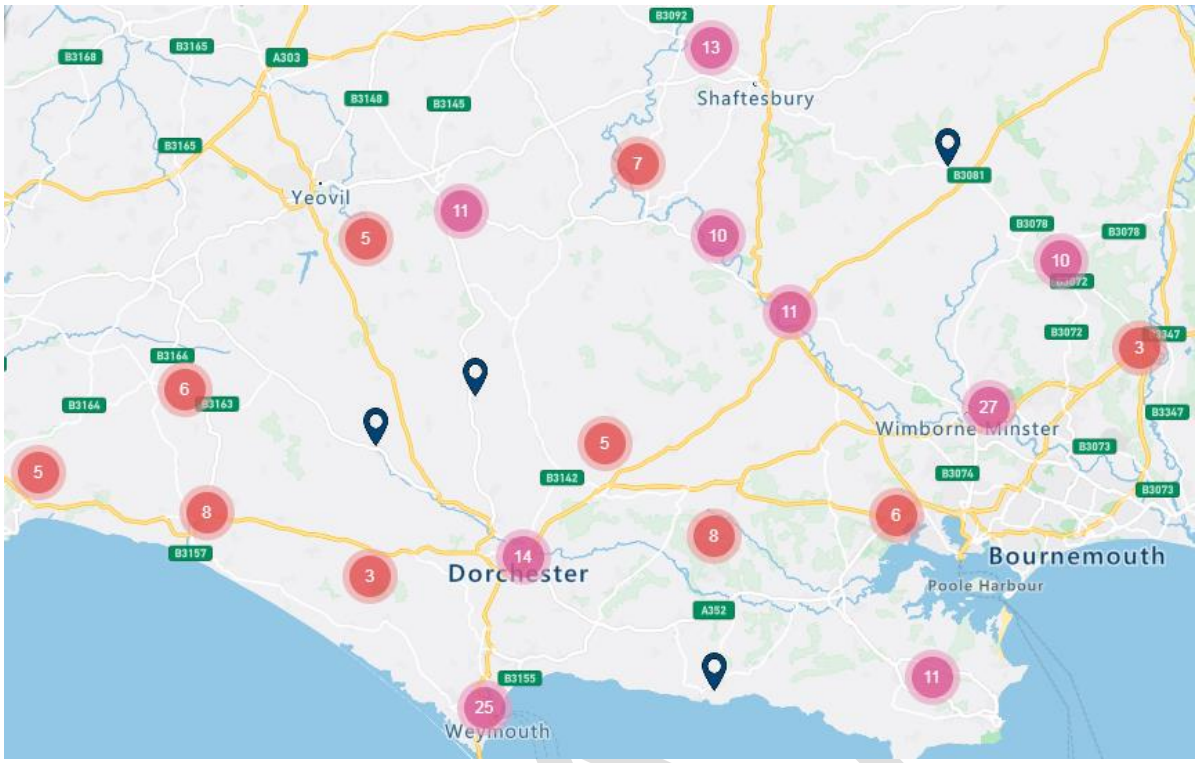


Figure 120. Map of Dorset schools – National Statistics, Interactive map Find and compare schools in England tool

Ofsted results

According to the currently available Ofsted inspection results (N=251), shown in Figure 121, the larger proportion of schools in Dorset LEP (n=157, 63%) were rated as 'good', and just over one fifth (n=52, 21%) as 'outstanding'. A number of schools (n=32, 13%) were deemed as 'requiring improvement' and 10 (4%) were assessed as 'inadequate'.

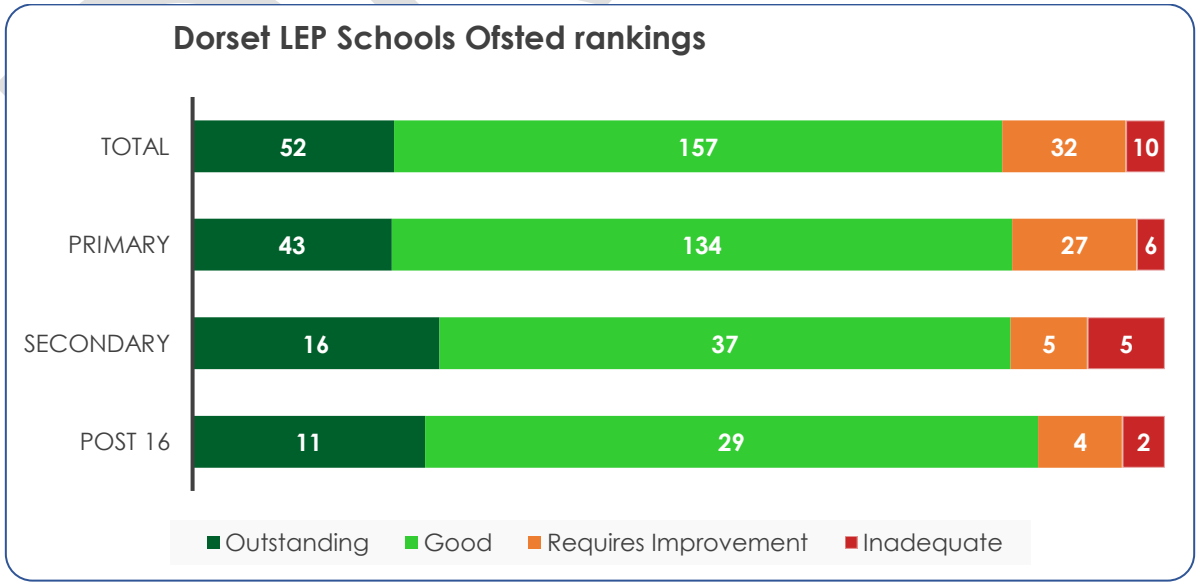


Figure 121. Dorset LEP schools Ofsted rankings. DfE, Find and Compare a School

Broken down into the two local authority areas, 90% of the schools in Bournemouth, Christchurch and Poole and 79% of those in Dorset were rated as either 'good' or 'outstanding' by Ofsted with the proportions of schools considered as 'requiring improvement' (DC=16%; BCP=7%) or ranked 'inadequate' (DC=5%; BCP=2%) higher in Dorset. Results per local authority are available below showing some differences in primary and secondary providers performance within the local authority areas. There are greater proportions of Post 16 educational providers within Dorset Council having 'good' or 'outstanding' results (DC=91%; BCP=83%). Conversely 95% of the BCP primary schools were considered 'good' or 'outstanding' vs 79% of those in Dorset.

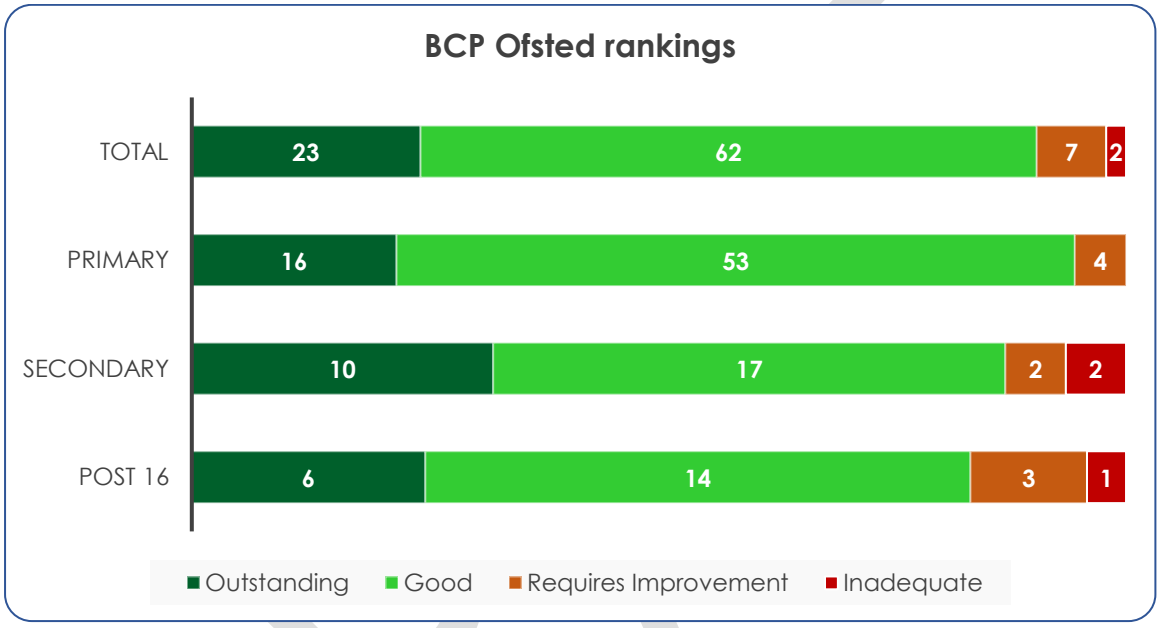


Figure 122. Bournemouth, Christchurch and Poole schools Ofsted rankings. DfE, Find and Compare a School

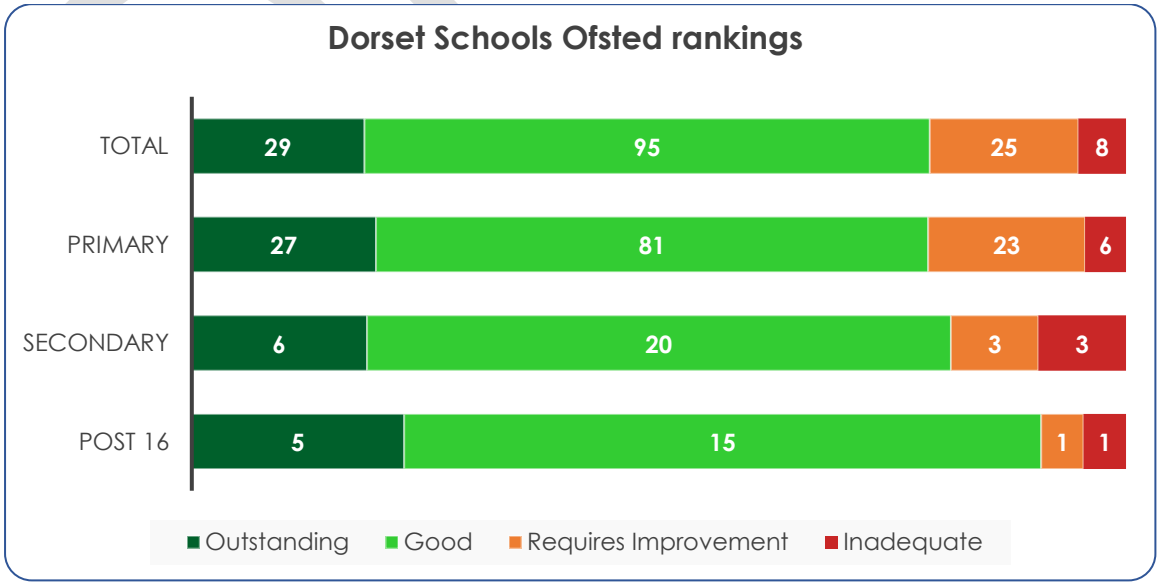


Figure 123. Dorset schools Ofsted rankings. DfE, Find and Compare a School

Post 16

As indicated in the Demographics and Population Growth section, the number of young people aged 16 to 18 is expected to grow by a fifth over the next 10 years, increasing the expected demand for post 16 education over the next decade.
For young people aged 16-18 there are a variety of academic and vocational routes in Dorset LEP – including sixth form, vocational qualifications via FE colleges and Skills Funded learning opportunities.
The majority of schools with sixth-forms were graded by Ofsted as good or outstanding.
The principal institutions largely delivering the majority of post 16 vocational provision are the three FE colleges: Bournemouth & Poole College, Weymouth College, and Kingston Maurward College. FE provision and participation is described in detail in a dedicated Further Education Providers section.

School attainment

Primary Performance (Key Stage (KS) 2)

In 2018-19, 64% of pupils in Dorset LEP were meeting the expected standards at the end of key stage 2, which is marginally below the England average of 65%. When compared to the national average (Figure 124), the proportion of pupils both meeting and exceeding the standards were higher than the average for England at BCP schools, and lower at Dorset Council schools.
Regarding the progress made in reading, writing and maths between the end of KS1 and the end of KS2, compared to pupils across England with similar baseline, the progress for BCP schools' pupils was closer to the England average and below the average for pupils in Dorset schools, with a more pronounced gap in Maths progress (Table 28).

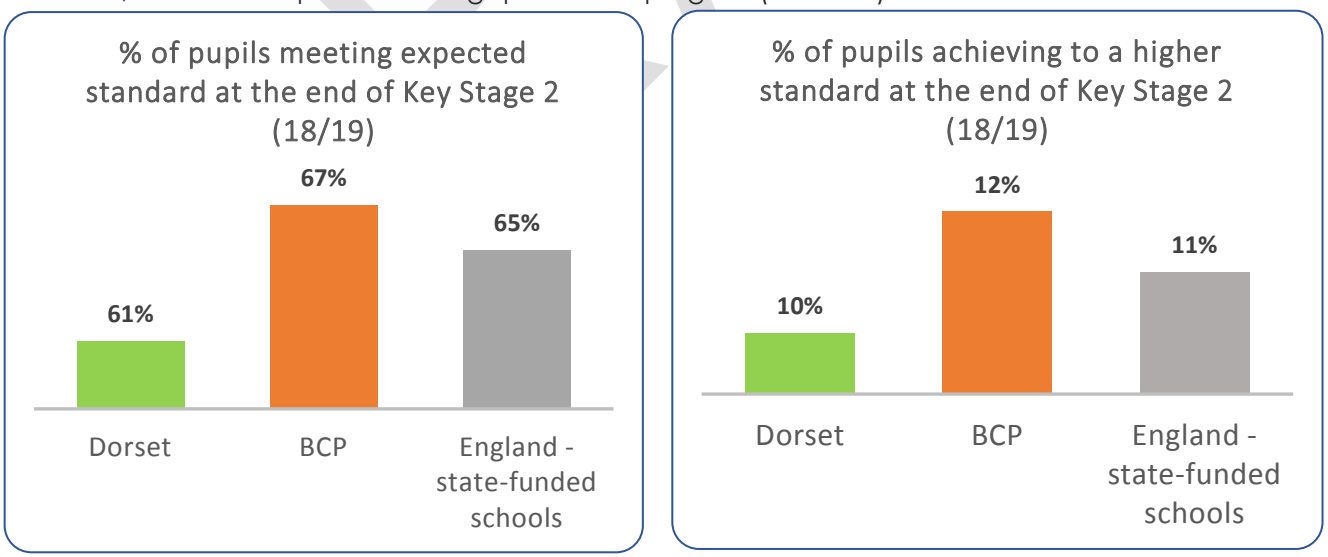


Figure 124. Proportion of pupils[53] meeting and exceeding KS2 standards. National Statistics, Crown Copyright, Find and compare schools in England tool 2018-19

[53] Based on 7732 pupils exiting KS2 in DLEP (school year 6, 11 year olds) in 2018-19 academic year

Table 28. Progress[54] made in Reading, Writing and Maths KS2. National Statistics, 2018-19 BCP and Dorset

Progress	Reading	Writing	Maths
BCP	**Below average**	**Average**	**Average**
	-0.4	-0.1	-0.1
Dorset	**Below average**	**Below average**	**Below average**
	-0.6	-0.7	-1.1

Secondary Performance (Key Stage (KS) 4)

This section presents some key tables and figures on pupil attainment across areas within Dorset at the end of key stage 4. An overview of these scores is shown in Table 29.

The Progress 8 [55]measure shows that **between the end of KS2 and KS4, pupils in Dorset LEP schools are progressing at, or above, the average rate compared to those in England** with pupils in BCP schools progressing at higher than average rates.

In 2018-19, **69% of pupils in Dorset LEP schools achieved a standard 4 and above scores in GCSEs in English and Maths, which is above the England average of 65%** at both council areas and well above at BCP schools.
While consistently higher, the historical developments in this measure shown in Figure 125 illustrate some historical variations in the Dorset LEP area scores when compared to a consistent improvement seen nationally over the recent years. Scores in England in 2018/19 improved by 6 percentage points on the previous year while the proportion achieving to this level in BCP schools fell for the first time in recent years.

Regarding higher standard attainment, 46% of pupils in Dorset LEP schools achieved a strong 5 and above scores in GCSEs English and Maths in 2018/19, which again is above the England average of 43%, but marks a 3 percentage point drop from the previous academic year. While the proportion of those achieving to this level at BCP was above the national average, it **fell under these benchmarks for Dorset for the first time in recent years (Figure 126).**

When it comes to attainment, Figure 127 demonstrates a dynamic picture for Dorset Council schools. Back in 2014/15 attainment 8 scores were at level with BCP schools and well above the average for England. The latest 2018/19 scores however were 3.6 percentage points lower than those achieved back in 2014/15 but still at level with national average. Possible explanation is lower KS2 baseline achievement.

[54] *A negative progress score does not mean pupils have made no progress, rather it means pupils made less progress than others across England with similar baseline results at the end of key stage 1. The majority of schools have progress scores between -5 and +5.*

Table 29. GCSE and equivalent results (2018/19). National Statistics, DfE 6 February 2020, Key stage 4 performance 2019 (revised)

	Average attainment 8 score of all pupils	Percentage of pupils who achieved a strong 9-5 score (5+ English and Maths)	Percentage of pupils who achieved a standard 9-5 score (4+ English and Maths)	Average progress 8 score per pupil[55]	
England	46.8	43.4	64.9	-0.03	-
BCP	50	51	70.5	0.22	**Above Average**
Dorset	46.4	40.8	66.7	0.02	**Average**

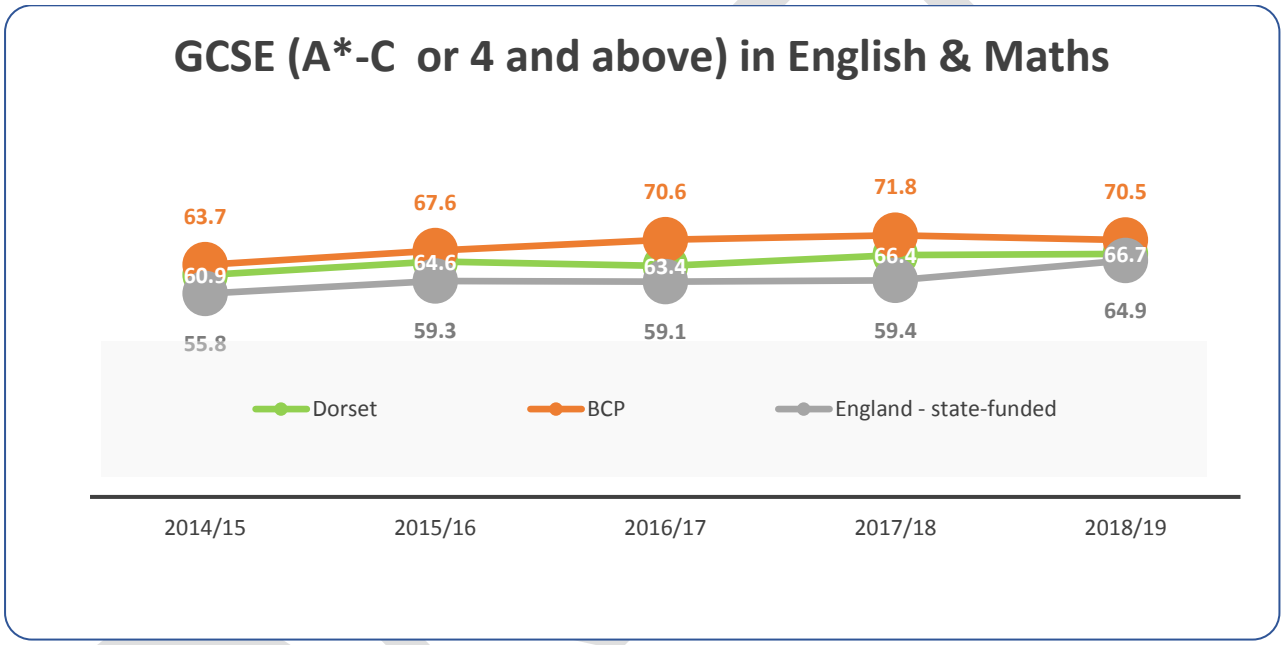


Figure 125. Historical GCSE 4 and above in English and Maths results. National Statistics, DfE 6 February 2020, Key stage 4 performance 2019 (revised)

[55] ***Progress 8*** *score is based on the results in up to 8 qualifications including English, maths, 3 English Baccalaureate qualifications including sciences, computer science, history, geography and languages, and 3 other additional approved qualifications) between the end of KS2 and the end of KS4, compared to pupils across England with similar baseline.*
Attainment 8 *score based on how well pupils have performed in up to 8 qualifications (described above)*
Grade 5 or above in English & Maths GCSEs *- the percentage of pupils who achieved grade 5 or above in the reformed English and Maths GCSEs – graded between 1 (low) and 9 (high). Grade 5 in the new grading is a similar level of achievement to a high grade C or low grade B in the old grading.*

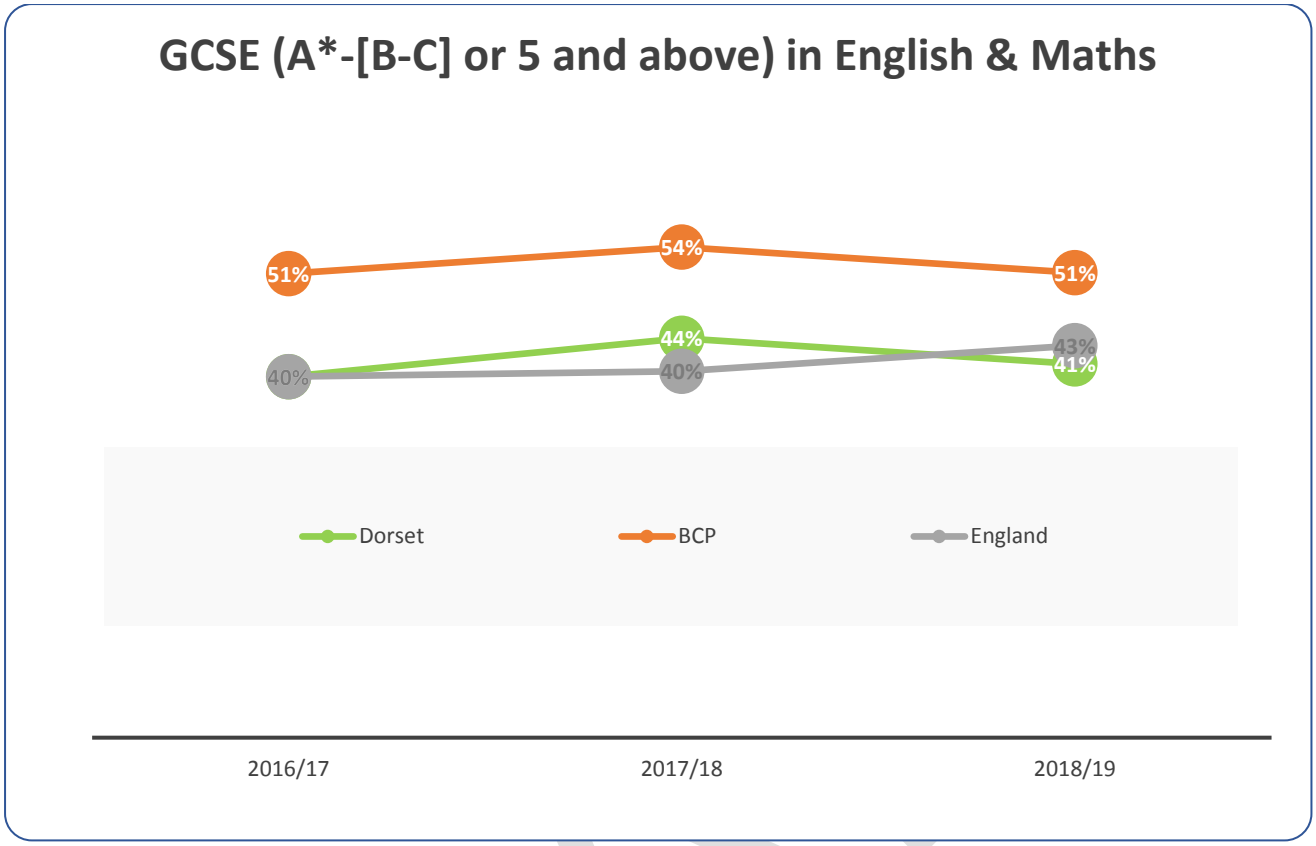


Figure 126. Historical GCSE 5 and above in English and Maths results. National Statistics, DfE 6 February 2020, Key stage 4 performance 2019 (revised)

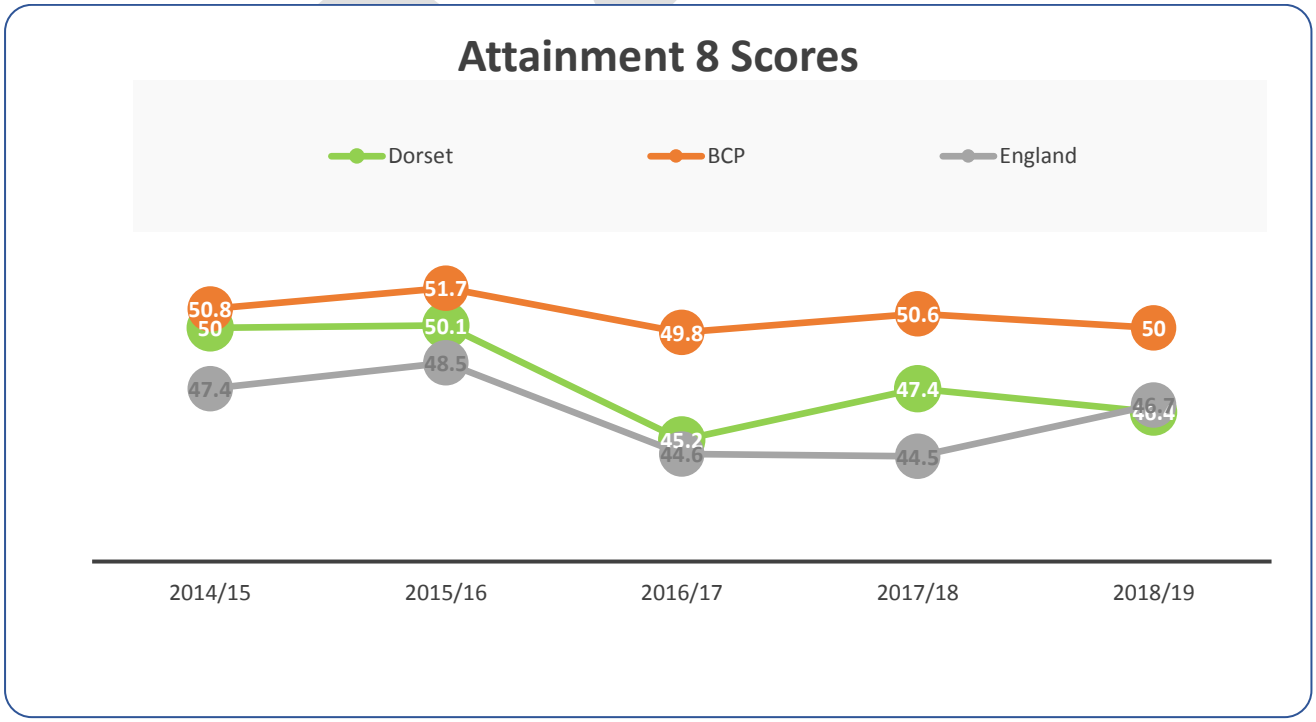


Figure 127. Historical Attainment 8 [55]scores. National Statistics, DfE 6 February 2020, Key stage 4 performance 2019 (revised)

Attainment of Disadvantaged Pupils

Looking into the difference in outcomes between disadvantaged and wider student cohorts at a national level, around half of schools disadvantaged pupils are typically at least 0.5 grades behind their peers.

The below table shows that the gap in attainment between disadvantaged and non-disadvantaged pupils is particularly marked in the Dorset Council area at secondary level[56]. The evidence suggests that this gap has widened over the past 5 years. The secondary attainment gap has narrowed in Bournemouth and Poole – this is when compared to local authorities with similar 'profiles'. However, the national research indicates that accountability reforms are more likely to be the cause of a reduction in the size of the gap than improvements in pupil performance.

Table 30. Gap in months (attainment) between disadvantaged[57] and non-disadvantaged pupils. Analysis of National Pupil Database – Education Policy Institute

Gap in months (attainment) between disadvantaged[58] and non-disadvantaged pupils			
	Early Years	**Primary Schools**	**Secondary Schools**
England	4.3	9.4	18.4
Bournemouth	1.7	9.2	19.2
Dorset	5.0	10.5	23.3
Poole	3.2	11.6	15.5

In general, the gap in attainment between disadvantaged and non-disadvantaged pupils widens as school life progresses. However, the below figures indicate that the gap is apparent at an early stage – with significant gaps in attainment already established pre-school.
At a national level, analysis suggests that 40% of the gap that exists at the end of school is already apparent by age 5. The gap then grows by a further 20% by the end of key stage 2, and the final 40% emerges through secondary school[59].

Table 31. Change in gap since 2012 – comparison with local authorities with similar 2012 gap. Analysis of National Pupil Database – Education Policy Institute

Change in gap since 2012 – comparison with local authorities with similar 2012 gap			
	Early Years	**Primary Schools**	**Secondary Schools**
England	-0.2*	-0.7	-1.6
Bournemouth	-0.5	-0.6	-2.6
Dorset	1.2	0.5	4.1
Poole	-0.7	2.0	-3.3

[56] This data still reflects Christchurch being part of the Dorset Council area
[57] Defined as those pupils who have been eligible for free school meals in any of the prior six years
[58] Defined as those pupils who have been eligible for free school meals in any of the prior six years
[59] 'Education in England: Annual Report 2018' – Education Policy Institute

Table 32. Percentage (%) share of persistently disadvantaged pupils in local authorities[60]. Analysis of National Pupil Database – Education Policy Institute

Percentage (%) share of persistently disadvantaged pupils in local authorities[61]		
	Primary School	**Secondary School**
Bournemouth	7.5	5.8
Dorset	7.5	2.8
Poole	7.2	1.9

This suggests that inter-generational issues are already established before children enter the educational system, and these gaps subsequently widen. This may also reinforce the importance of early years interventions, including supporting disadvantaged/'at risk' families from the point of conception. The attainment gap is part of a larger picture of socio-economic inequalities in life outcomes, including lifelong health and well-being, labour market opportunities and wealth.

School – destination of leavers

This section looks at the student destinations after leaving education providers at key stages 4 & 5. Since the Government introduced legislation in the Education and Skills Act 2008 (introduced in 2013 for 16-year olds) it is compulsory for all 16 year olds to continue in either full-time education, apprenticeship/traineeship or volunteering/part-time education until the age of 18.
"September Guarantee" [62] statistics for 2019 show that 93% of BCP and 94% of Dorset young people have received a suitable offer, which while high, is slightly lower than the national average of 95%[63].

In terms of post key stage 4 – as expected, most (just below 90%) continue into other forms of education. 5% of 16-year olds move into an apprenticeship, with a further 3%-5% moving into a sustained employment destination. Those entering apprenticeships post key stage 4 did so almost wholly at 'intermediate' level 2.

The NEET (not in Education, Employment, or Training) data published in November 19 is shown in the below table. This data tends to fluctuate, as more details develop about young people with 'not known destination'.

60 Defined as those who have been eligible for free school meals for 80% or more of their time in school
61 Defined as those who have been eligible for free school meals for 80% or more of their time in school
62 September guarantee - measure used by LAs to encourage young people's education/ training participation after KS4 by ensuring at least 1 suitable offer is received
63 DfE https://www.gov.uk/government/publications/september-guarantee-offers-of-education-or-training-for-16-to-17-year-olds

Table 33. **Proportion (%) 16-17 year olds classified as NEETs and destination 'not known'.** BCP Council

	3-month average NEETs + Not Known % (Sept 19-Nov 19)	*Month-end (Nov 19) NEETs + Not Known (%)*	*Month-end (Nov 19) NEETs (%)*	*Month-end (Nov 19) Not Knowns (%)*
BCP	9.7%	5.4%	3.2%	2.2%
Dorset Council	11.8%	5.0%	3.1%	1.9%
South West	14.5%	7.7%	2.7%	5.0%
National average	17.8%	8.1%	2.4%	5.6%

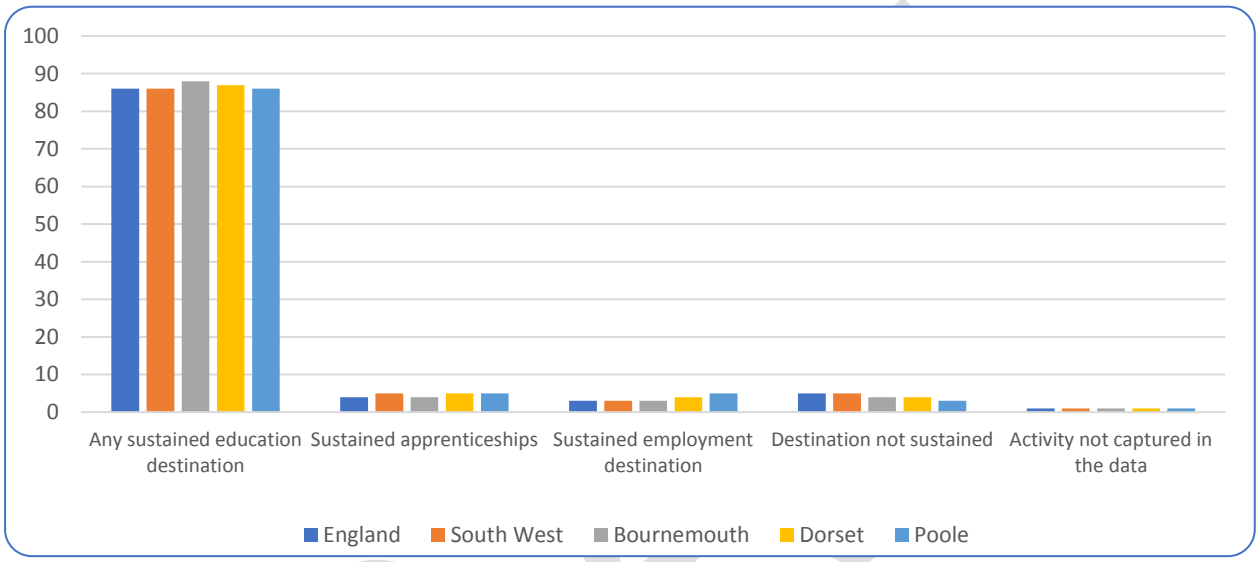


Figure 128. Education destinations of pupils after completing key stage 4 (% of total) – 2016/17. Longitudinal Education Outcomes dataset – DfE

Of those that move into other forms of education, there is some differences across the Dorset LEP area in terms of whether they choose to extend learning through a sixth form attached to a school or whether through a FE College or other provider (Figure 128). Compared to the UK and South West greater proportion of students in Dorset choose to continue in a school sixth form rather than an FE College.

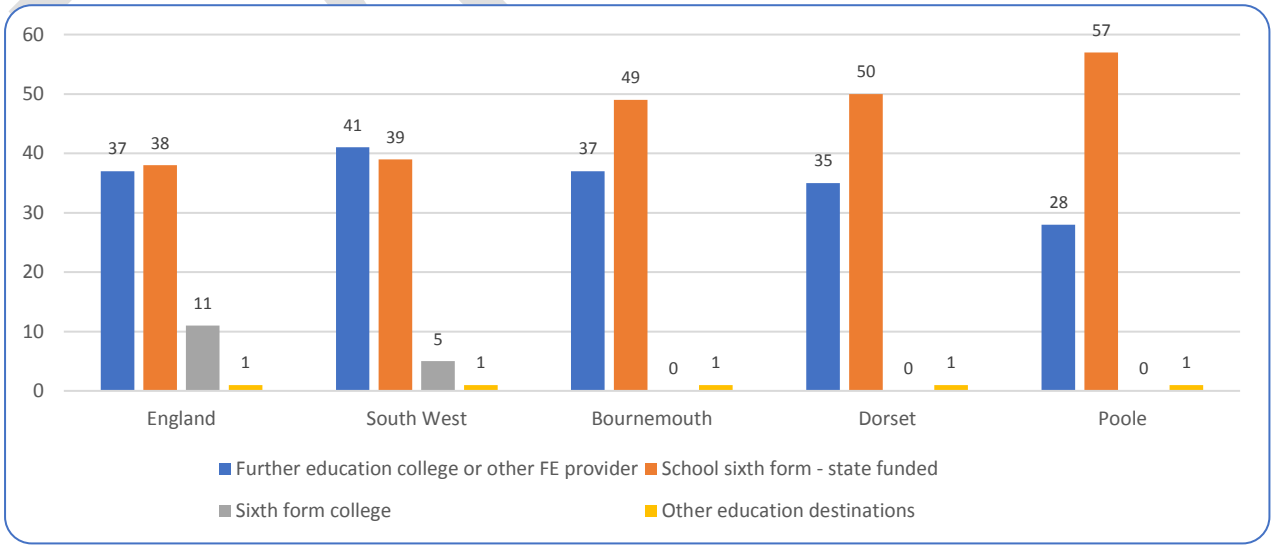


Figure 129. Pupil destinations after completing key stage 4 (state-funded mainstream schools) – 2016/17. Longitudinal Education Outcomes dataset – DfE

The data shows a clear differential in terms of destinations between disadvantaged students and all pupils. Figure 130 shows the percentage point difference between disadvantaged pupils and all pupils, illustrating that disadvantaged pupils are less likely to move into continued forms of education (for example, in areas such as Christchurch, East Dorset and Bournemouth the difference is marked).

It also shows that disadvantaged pupils tend to move into outcomes/destinations which are not sustained. This raises concerns about whether those individuals simply move into some form of transient state. At a national level, it has been shown that higher proportions of disadvantaged learners are found either in unsustained destinations or studying at FE colleges, with lower proportions choosing to continue into school sixth form.

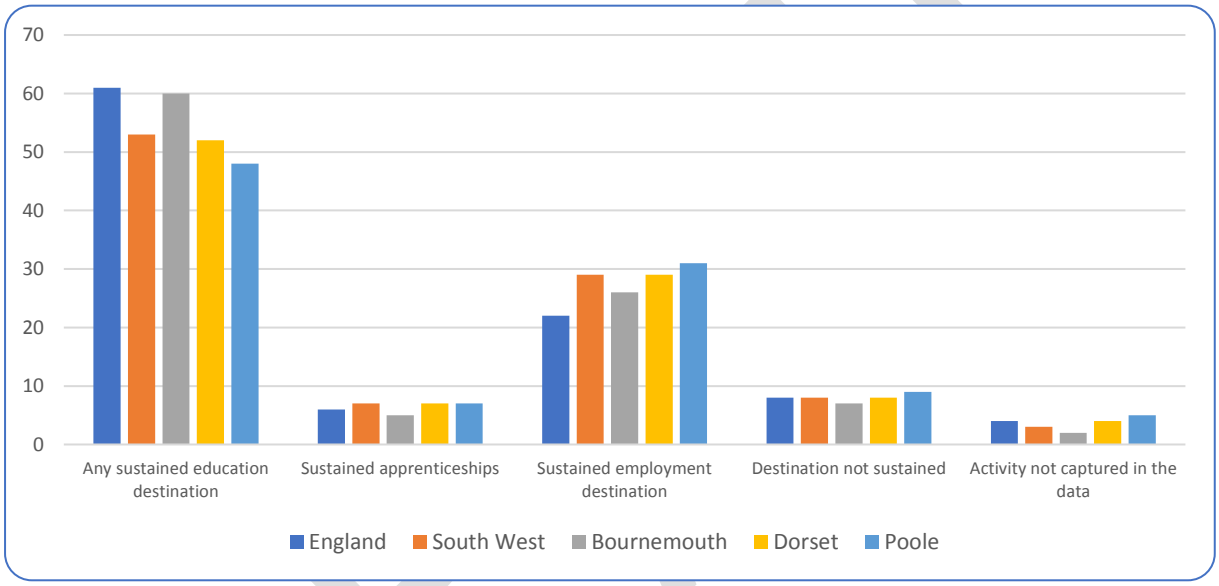


Figure 130. Pupil destinations after key stage 4 by disadvantaged status (percentage point difference). **Longitudinal Education Outcomes dataset – DfE**

In terms of student destinations after key stage 5 (16 to 18-year olds), Figure 131 shows that there is some variance in the proportion of students who continue in education or employment in the different areas within Dorset LEP. For example, a higher proportion of Bournemouth students continue in education when compared to Poole, where there is a greater tendency to move into an employment destination. This data is for all students, not just disadvantaged.

The majority of those who went onto education after key stage 5 moved into higher

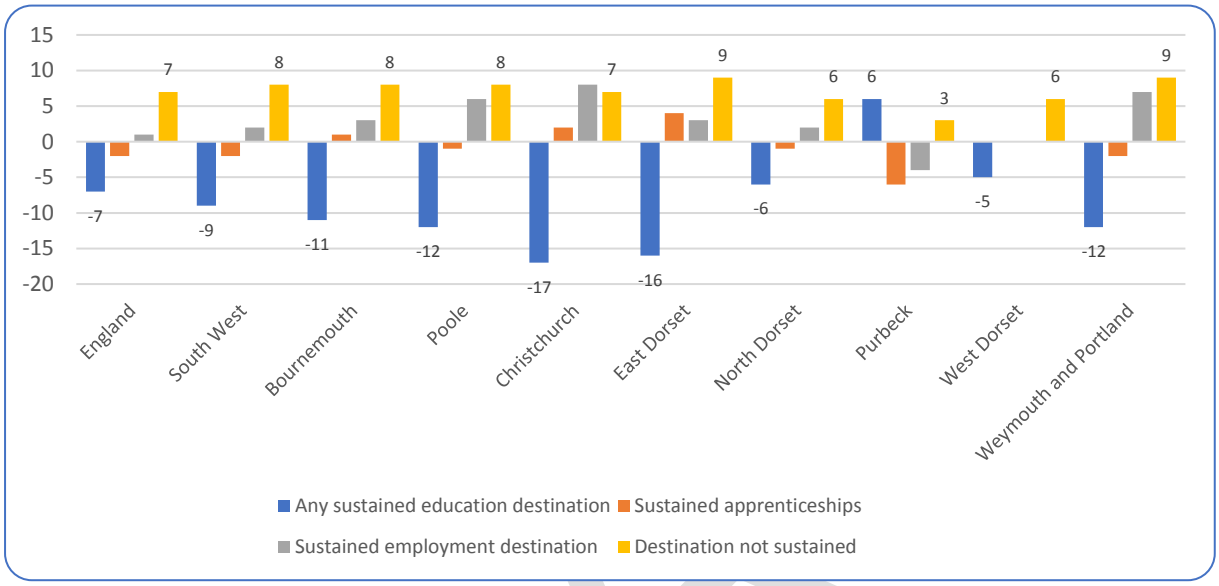


Figure 131. Student destinations after Key Stage 5 (2016/17 data for 2015/16 cohort). **Longitudinal Education Outcomes dataset – DfE**

education (Figure 132). As has been publicised, the 'symbolic national target' of 50%[64] of 18-year olds moving into higher education has recently been achieved. In Bournemouth this has been exceeded, whilst in Dorset and Poole a lower proportion (41%) progressed into higher education in 2016/17.

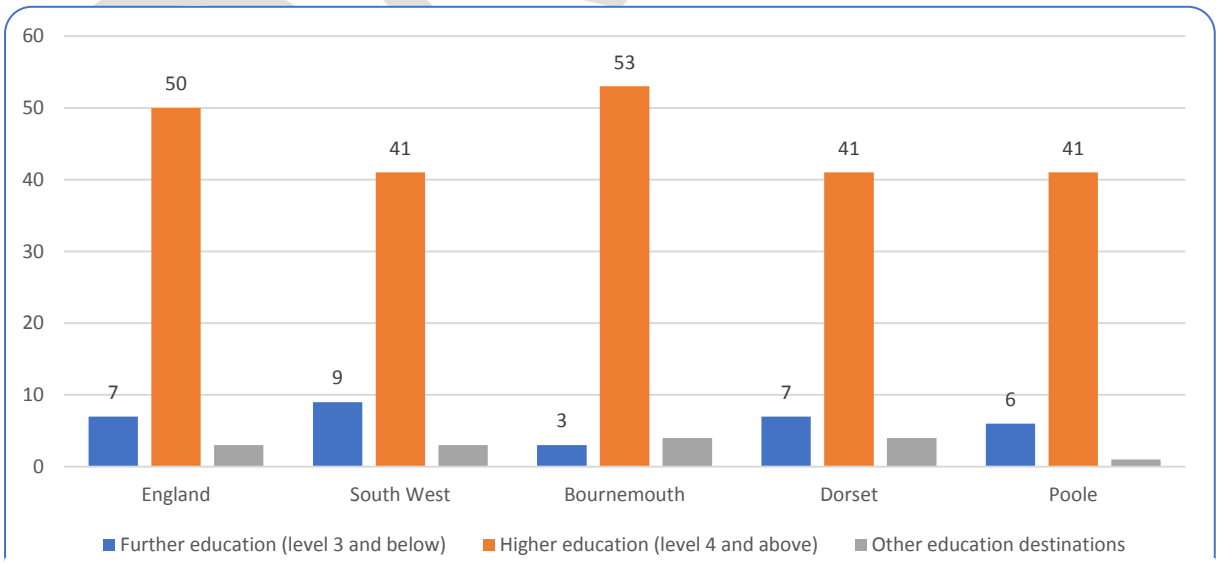


Figure 132. Student education destinations by level (after key stage 5). Longitudinal Education Outcomes dataset – DfE)

[64] As expressed by the Labour Government in 1999

Figure 133 shows the proportion of those who enter higher education that go to some of the more selective HE institutions. It shows that students in Bournemouth tend to have a higher propensity to attend one of the more selective institutions.

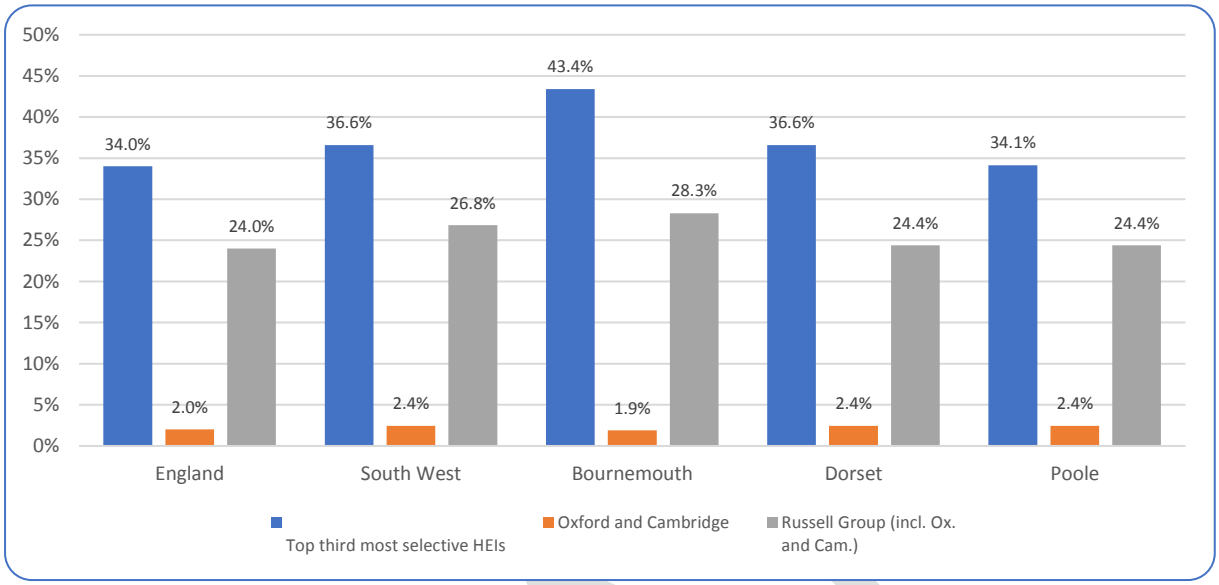


Figure 133. Higher education destinations by institution type (HE level 4 and above). Longitudinal Education Outcomes dataset – DfE

In terms of apprenticeships post key stage 5, Figure 134 shows that in the Dorset LEP area this tends to be at different levels. Whilst most of those leaving key stage 5 are undertaken at levels 2 & 3, a small proportion undertake higher and degree level apprenticeships. Figure 134 shows the proportion of the total numbers of students after completion of key stage 5 – 1% of the total post key stage 5 students undertaking a level 4 apprenticeship. The data suggests that this is marginally higher than at a national level. It is important to note that the below chart shows the proportion of all students post key stage 5 that undertake the differing levels of apprenticeships. It does not represent the breakdown of apprenticeships at the various levels.

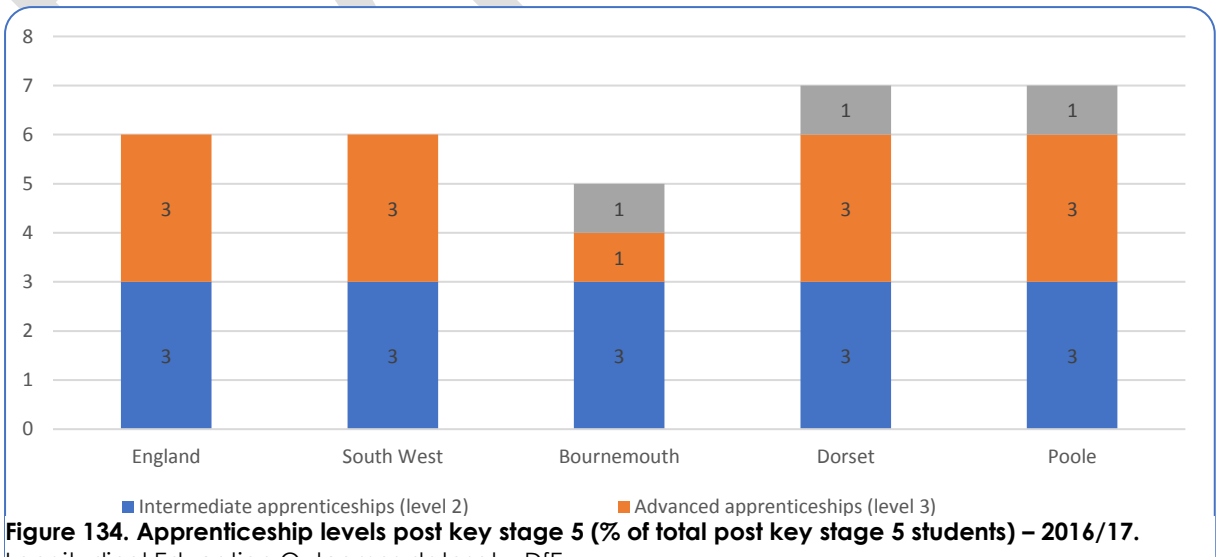


Figure 134. Apprenticeship levels post key stage 5 (% of total post key stage 5 students) – 2016/17. Longitudinal Education Outcomes dataset – DfE

Finally, focusing specifically again on the destinations of disadvantaged students – this time following key stage 5 – Figure 135 shows the proportion of students entering higher education. It illustrates that there is a clear marked difference in the proportion moving onto higher education.

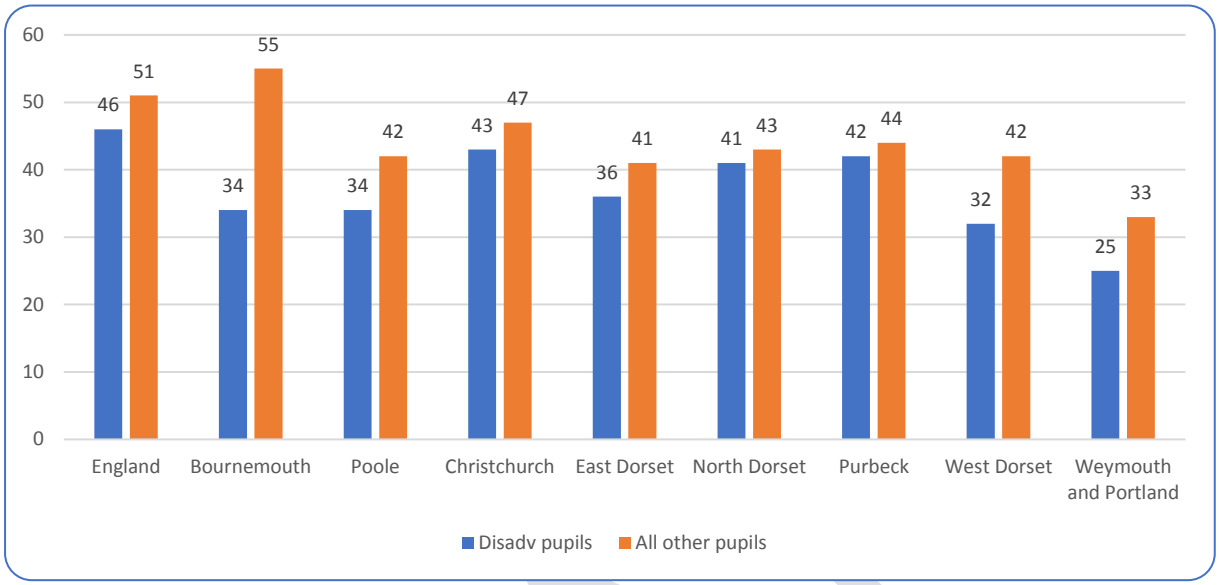


Figure 135. **% of students moving into higher education (after key stage 5).** Longitudinal Education Outcomes dataset – DfE

Conversely, there is a greater tendency for disadvantaged students not to have a sustained destination (either education, employment or apprenticeships) following key stage 5. In some areas such as North Dorset and Weymouth & Portland the difference is quite marked.

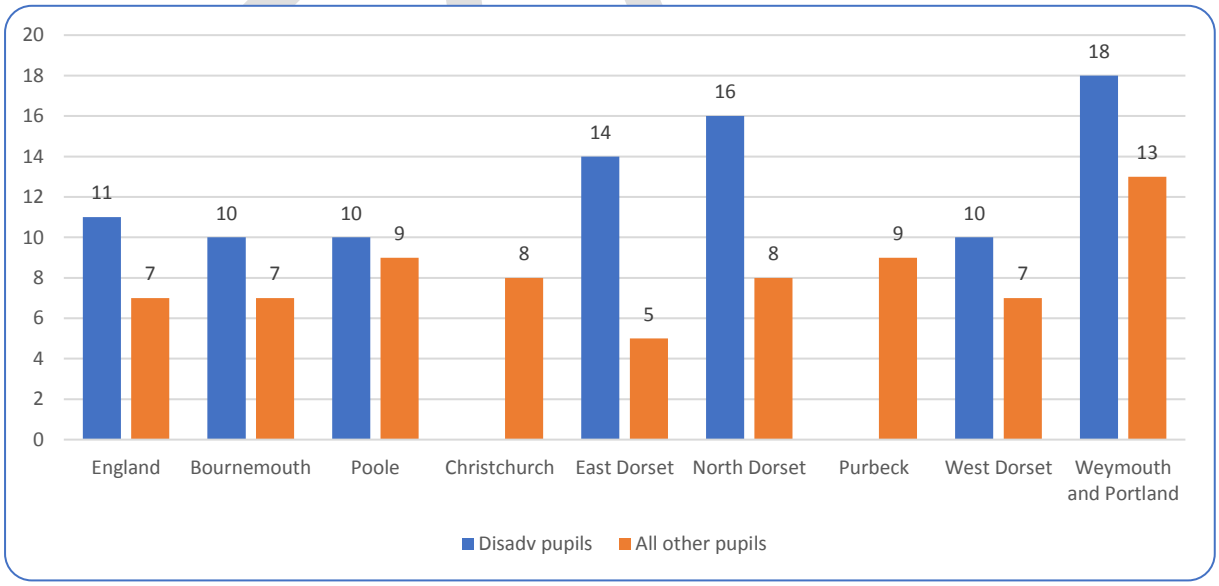


Figure 136. % of students who do not have a sustained destination (after key stage 5). Longitudinal Education Outcomes dataset – DfE

This analysis can be expanded at an institutional level to show the destination data for post Key Stage 5. The following tables compare the schools and colleges in terms of their students' destinations and showing the destinations of all students and for disadvantaged students.

Table 34. Student destinations after key stage 5 (all students). Key Stage 5 destination measures 2016 to 2017 – DfE

Dorset Council	N students at the end of KS5 in 2016/17	% in Education /Employment	% in Apprenticeship	% in Education	% in HE	% in Employment	% Not Sust.Destination
The Sir John Colfox Academy	73	85%	14%	37%	27%	34%	12%
Ferndown Upper School	131	85%	13%	44%	37%	29%	7%
The Purbeck School	81	81%	7%	48%	48%	26%	10%
Lytchett Minster School	128	87%	5%	52%	47%	29%	10%
Gillingham School	187	89%	9%	51%	41%	29%	9%
Queen Elizabeth's School	205	85%	8%	41%	40%	36%	10%
Beaminster School	48	88%	8%	52%	38%	27%	10%
The Blandford School	93	94%	9%	55%	45%	30%	5%
Shaftesbury School	162	80%	9%	46%	38%	26%	10%
The Gryphon School	231	85%	5%	45%	38%	35%	10%
Thomas Hardye School	332	91%	4%	59%	47%	28%	7%
The Woodroffe School	90	81%	3%	46%	41%	32%	12%
Budmouth College	200	88%	8%	53%	48%	27%	8%
Weymouth College	573	72%	9%	23%	13%	40%	20%
Kingston Maurward College	321	76%	17%	12%	3%	47%	16%
Total/ Average	**2855**	**84%**	**9%**	**44%**	**37%**	**32%**	**10%**
BCP Council							
The Grange School	26	88%	15%	15%	12%	58%	12%
Twynham School	166	92%	7%	48%	45%	37%	6%
Highcliffe School	132	88%	5%	56%	51%	27%	5%
Magna Academy	50	66%	10%	22%	20%	34%	10%
St Edward's Catholic/C of E School, Poole	92	90%	10%	57%	55%	24%	7%
Parkstone Grammar School	163	91%	1%	77%	77%	12%	7%
Poole High School	125	91%	6%	47%	47%	38%	3%
Poole Grammar School	150	84%	3%	61%	56%	20%	11%
Corfe Hills School	162	85%	6%	50%	46%	29%	9%
The Bournemouth and Poole College	1900	74%	17%	20%	12%	37%	17%
LeAF Studio	63	79%	8%	37%	30%	35%	16%
Oak Academy	106	85%	9%	24%	18%	52%	11%
Bournemouth School	185	86%	3%	64%	62%	18%	11%
Avonbourne Girls Academy	87	82%	6%	51%	37%	25%	9%
Bournemouth School for Girls	167	90%	4%	63%	58%	24%	7%
St Peter's Catholic Comprehensive School	141	88%	8%	58%	48%	22%	8%
The Bishop of Winchester Academy	53	85%	9%	58%	55%	17%	4%
The Bourne Academy	41	78%	5%	56%	51%	17%	15%
Total/ Average	**3809**	**85%**	**7%**	**48%**	**43%**	**29%**	**9%**

Table 35. Disadvantaged student destinations after key stage 5. Key Stage 5 destination measures 2016 to 2017 – DfE - percentage of students with activity recorded in 2016/17

Dorset Council	N students at the end of KS5 in 2016/17	% in Education Employment	% in Apprenticeship	% in Education	% in HE	% in Employment	% Not Sust. Destination
The Sir John Colfox Academy	10	90%	0%	40%	40%	50%	0%
Ferndown Upper School	20	85%	15%	50%	40%	20%	10%
The Purbeck School	8	50%	0%	25%	25%	25%	25%
Lytchett Minster School	14	100%	21%	36%	29%	43%	0%
Gillingham School	11	82%	18%	45%	45%	18%	9%
Queen Elizabeth's School	12	92%	42%	25%	17%	25%	8%
Beaminster School	x	x	x	x	x	x	x
The Blandford School	9	78%	22%	22%	22%	33%	11%
Shaftesbury School	10	70%	20%	40%	20%	10%	20%
The Gryphon School	16	69%	6%	44%	25%	19%	13%
The Thomas Hardye School	21	86%	0%	48%	38%	38%	14%
The Woodroffe School	10	60%	0%	40%	x	20%	30%
Budmouth College	22	77%	9%	36%	27%	32%	9%
Weymouth College	148	63%	7%	18%	6%	38%	32%
Kingston Maurward College	57	74%	18%	23%	x	33%	21%
Total/ Average	**368**	**77%**	**13%**	**35%**	**28%**	**29%**	**14%**
BCP Council							
The Grange School	7	71%	0%	x	0%	x	x
Twynham School	15	80%	13%	47%	33%	20%	13%
Highcliffe School	7	100%	14%	29%	29%	57%	0%
Magna Academy	9	89%	11%	33%	22%	44%	11%
St Edward's Catholic/C of E School, Poole	10	100%	20%	80%	x	0%	0%
Parkstone Grammar School	9	100%	11%	67%	67%	22%	0%
Poole High School	19	95%	0%	32%	32%	63%	5%
Poole Grammar School	7	86%	14%	29%	29%	43%	0%
Corfe Hills School	7	86%	0%	57%	43%	29%	14%
The Bournemouth and Poole College	508	62%	12%	15%	9%	35%	29%
LeAF Studio	12	58%	0%	42%	25%	17%	25%
Oak Academy	28	79%	7%	25%	14%	46%	11%
Bournemouth School	13	92%	8%	69%	46%	15%	0%
Avonbourne Girls Academy	13	85%	0%	62%	38%	23%	8%
Bournemouth School for Girls	11	82%	9%	55%	55%	18%	18%
St Peter's Catholic Comprehensive School	10	80%	0%	40%	40%	40%	20%
The Bishop of Winchester Academy	8	88%	0%	50%	25%	38%	13%
The Bourne Academy	13	69%	0%	62%	54%	8%	23%
Total/ Average	**706**	**83%**	**7%**	**47%**	**33%**	**30%**	**11%**

These tables highlight that more students from BCP schools/ colleges tend to continue into HE destinations, FE students tend to progress more into employment, rather than educational destinations and there is a gap between disadvantaged students and their non-disadvantaged peers appear more pronounced for students from Dorset schools/ colleges.

Further Education Participation

Further Education (FE) refers to any study taken after the age of 16 that is not part of higher education (that is, not taken as part of an undergraduate or post-graduate degree).[65] It is delivered by a range of public, private and voluntary sector providers and, in general, equips a learner for further learning, including Higher Education, or employment.
Further education participation is a key element in the context of qualifications and skills delivery and plays an important role in addressing the gap for disadvantaged groups.

This section highlights the volume and type of participation in Further Education within the Dorset LEP area, while the FE providers are described in the following sections.

This data is provided by the Department for Education and the Education and Skills Funding Agency[66]. Figure 137 shows the total number of individuals participating or achieving (qualifying) with FE providers within the Dorset LEP area. It is important to note that the different figures (participation/achievement) reflects different time periods, rather than necessarily differences in 'achievement rates' i.e. the gap between participation and achievement does not represent a 'drop off rate'. Instead, it shows the number of students who were active learners in that year (participation) against those who completed their study (achievement). It is also important to note that the data in the following charts are based on the postcode of the learner – not necessarily the location of the provider. We also analyse the data separately (later in this section) relating to the main FE providers located in the Dorset LEP area.

The data shows a fall in the numbers participating in learning through an FE provider. This is discussed in more detail below, but in principal is due to a significant fall in the number of adult learners.

[65] This is the definition used by government. https://www.gov.uk/further-education-courses/overview
[66] https://www.gov.uk/government/statistical-data-sets/fe-data-library-further-education-and-skills

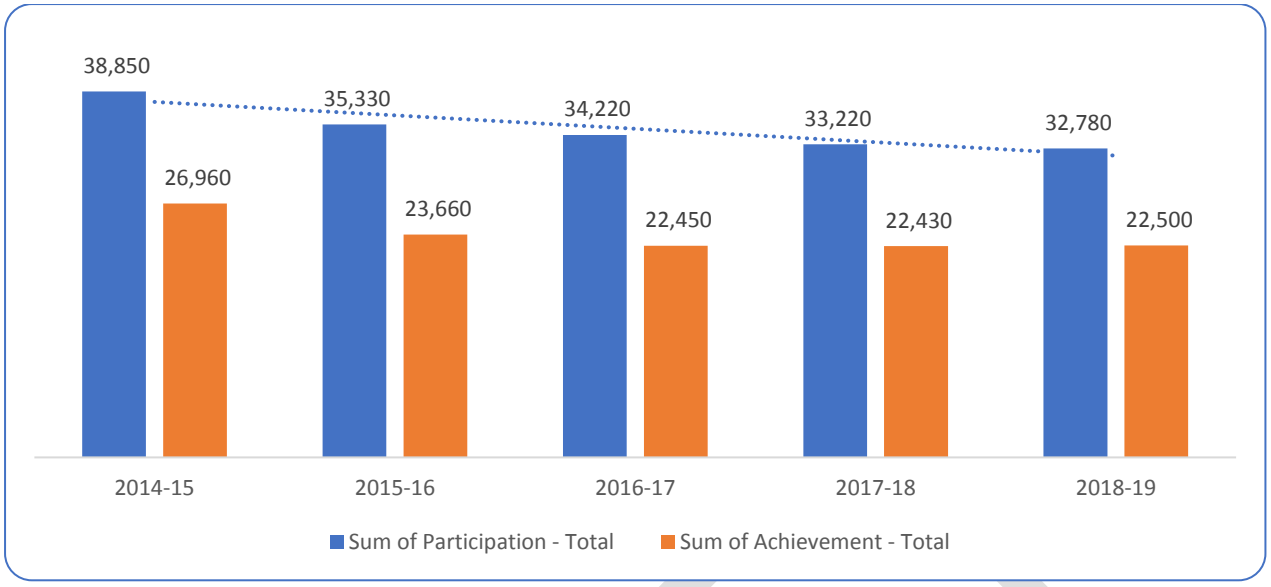


Figure 137. FE participation and achievement (DLEP area – postcode of learner). Further education and skills data – DfE and ESFA

In the following figures, the data is shown separately by Dorset LEP geographies. It is important to note that how the data is provided has changed in terms of geographical breakdown. Prior to the most recent release (2018-19), the data for Christchurch was included in the Dorset breakdown, while in the latest release it is included as part of BCP. Consequently, the data in the following two tables means that the 17/18 and 18/19 data are not strictly comparable. In 17/18, Christchurch is included in the Dorset figures whilst in 18/19 it is included in the BCP figures which possibly explains the increase in BCP in the latest release illustrated below.

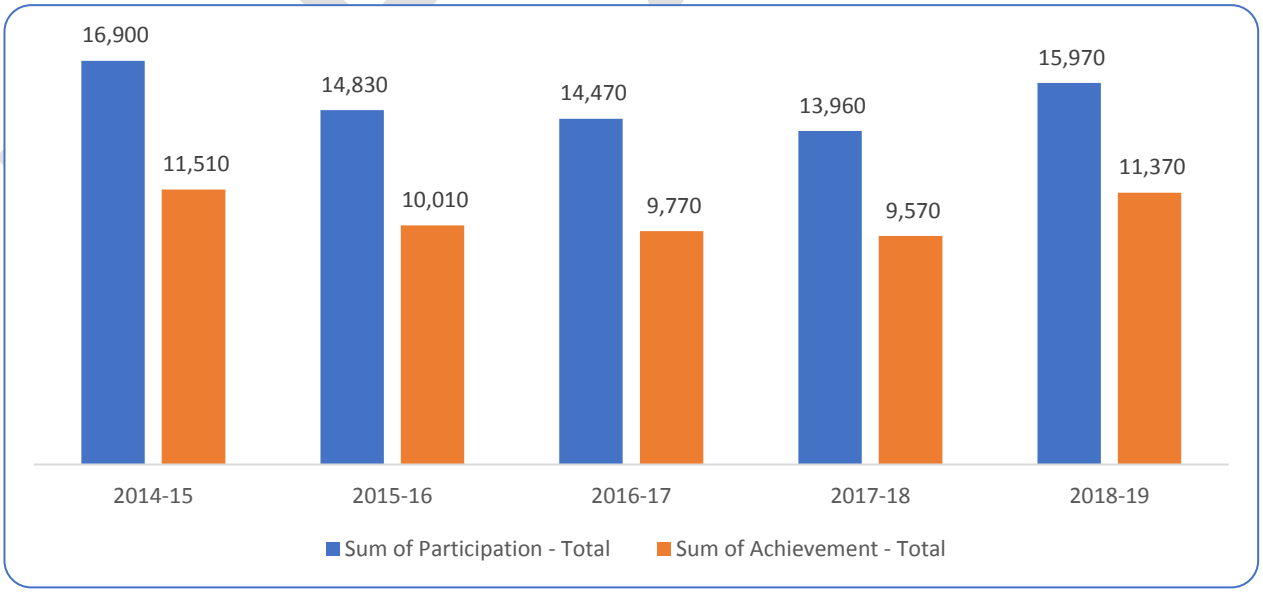


Figure 138. FE participation and achievement (Bournemouth and Poole including Christchurch in 2018-19 figures – postcode of learner). **Further education and skills data – DfE and ESFA**

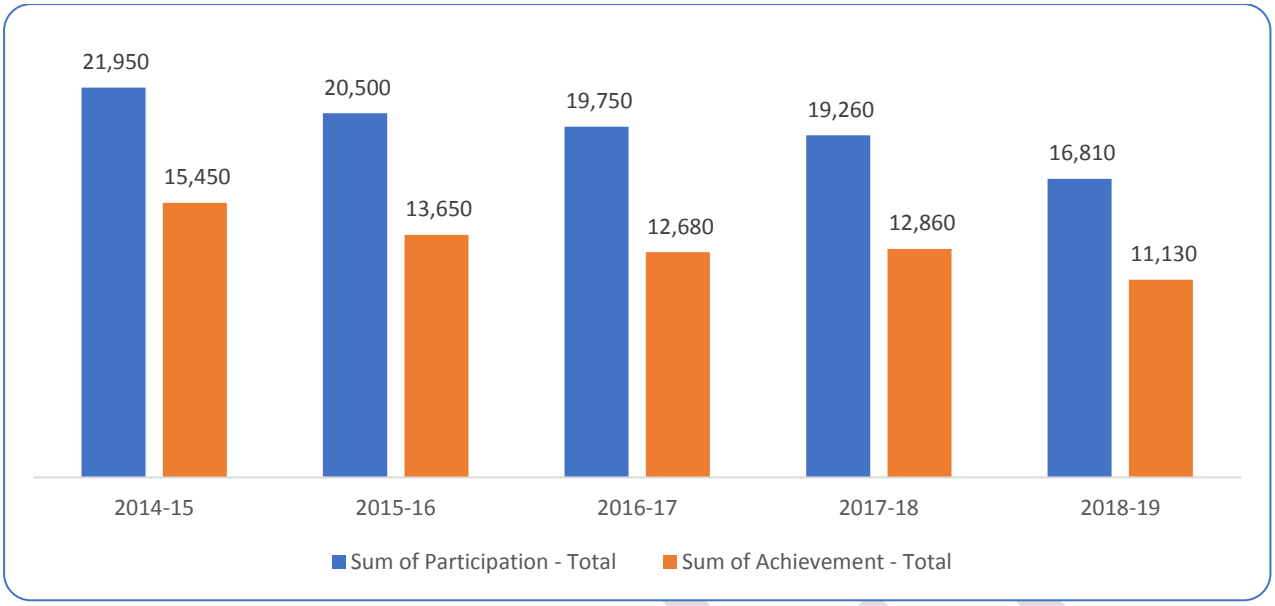


Figure 139. FE participation and achievement (Dorset excluding Christchurch in 2018-19 **– postcode of learner).** Further education and skills data – DfE and ESFA

Overall, there were c.6000 less FE learning participants in Dorset LEP in 2018-19 when compared to 2014-15. As stated, the falls in participation have principally been driven by significant falls in the number of adult (aged 18 and above) learners. It appears that the cuts in funding – combined with changes in eligibility - to the adult education budget have had a considerable impact on the ability/propensity for providers to offer learning opportunities to this age cohort. Given that provision now cannot be fully subsidised (or even part subsidised) due to a lack of available budget, individuals are often unable, or unwilling, to bear the financial cost of the courses provided. The changes in eligibility for beneficiaries are detailed and complex (gov.uk/government/publications/adult-education-budget-aeb-funding-rules-2019-to-2020).
In effect, adult education budgets can be used for a narrower client group. There is also a more restricted list of qualifications that can be delivered. Full funding is now only available to those who are eligible for co-funding and annually earns less than £16,000. Figure 140 shows that the largest fall in adult learners between 2014-15 and 2017-18 academic years have occurred in the Dorset Council area (latest figures excluded due to the changes in reporting detailed earlier).

In general, the fall in the number of 16-18 learners over this period has been influenced by demographics, whilst the fall in adult learners has been influenced by policy changes at a national level. This provides implications and policy questions at a local level.
Strategy documents emerging from this evidence base will need to place an emphasis on training/upskilling the existing workforce – partly to address the 'replacement demand' issue highlighted earlier, as well as aiming to move more of the workforce into more productive jobs. It could be argued that these local economic development aspirations are constrained by changes in national adult educational policy (and associated funding).

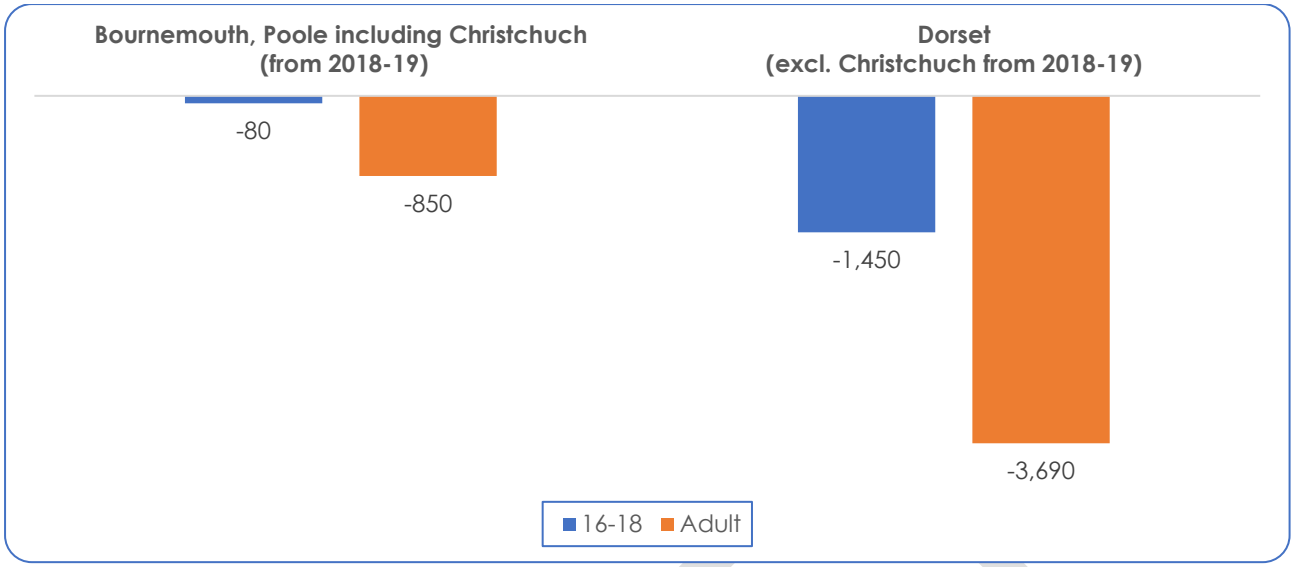


Figure 140. Change in FE participation (2014-15 to 2018-19 – postcode of learner). Further education and skills data – DfE and ESFA

In terms of levels of study, the largest falls in participation have occurred at Full Level 2, followed by participation in English and Maths – as shown in Figure 141.

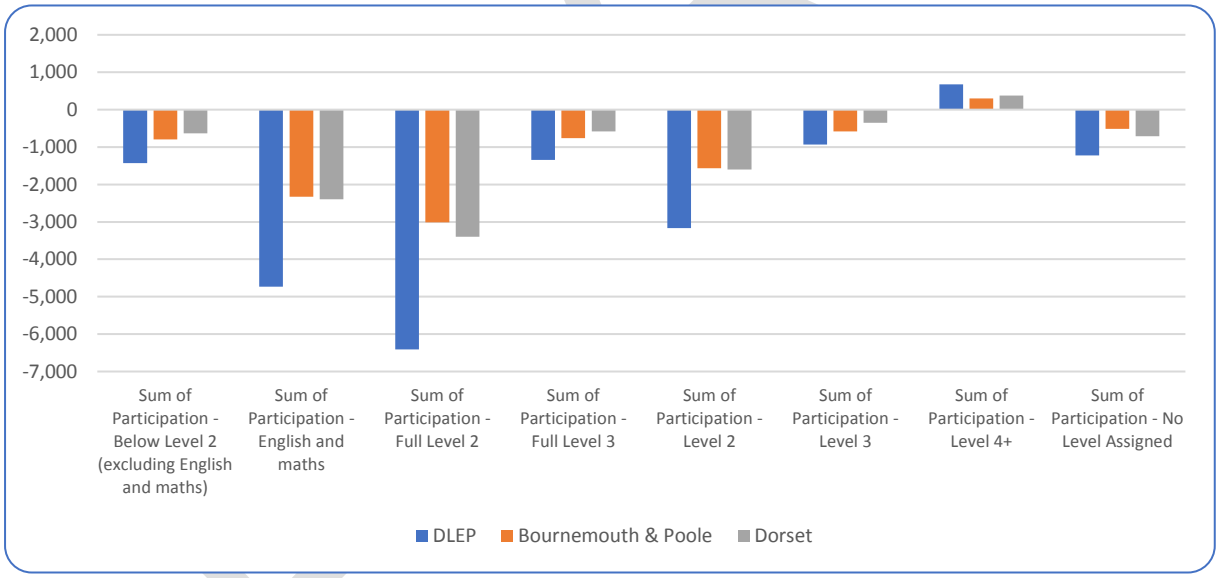


Figure 141. Change in FE participation by level (2014-15 to 2017-18 – postcode of learner). Further education and skills data – DfE and ESFA

The data is also set out in Figure 142 in terms of achievement by level. Again, this shows that overall within Dorset LEP the numbers of individuals achieving qualifications at all levels have fallen within the FE system since 2014-15, apart from a small gain at Level 4+.

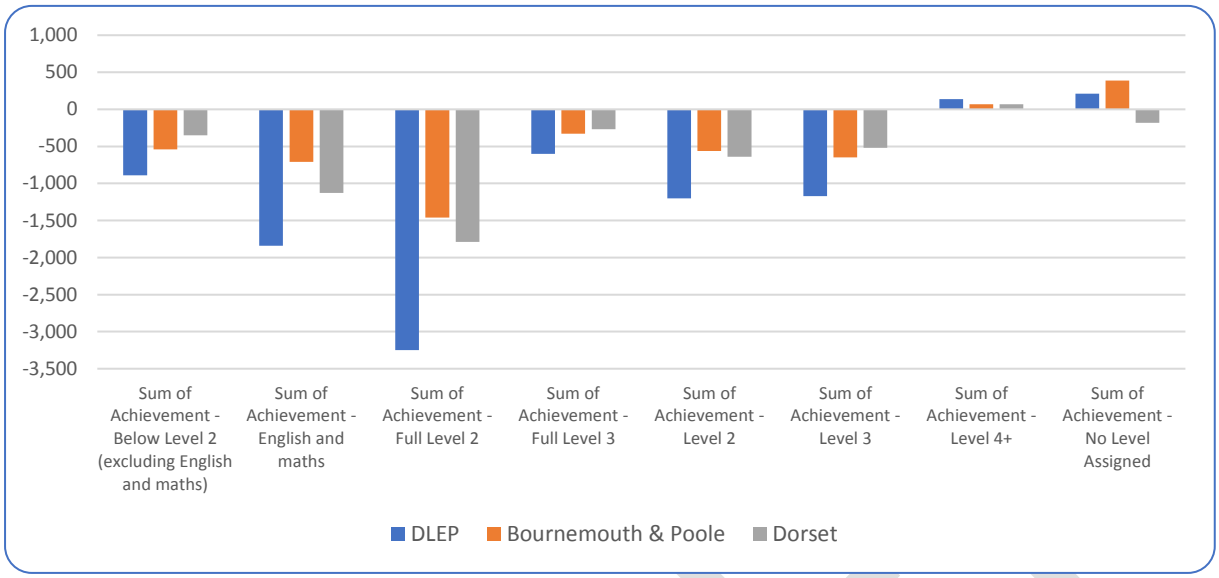


Figure 142. Change in FE achievement by level (2014-15 to 2017-18 – postcode of learner). Further education and skills data – DfE and ESFA

To re-emphasise the earlier finding about this primarily being driven by falls in the number of adult learners, this is again shown in Figure 143 (participation) and Figure 144 (achievement) – this time broken down according to qualification level.

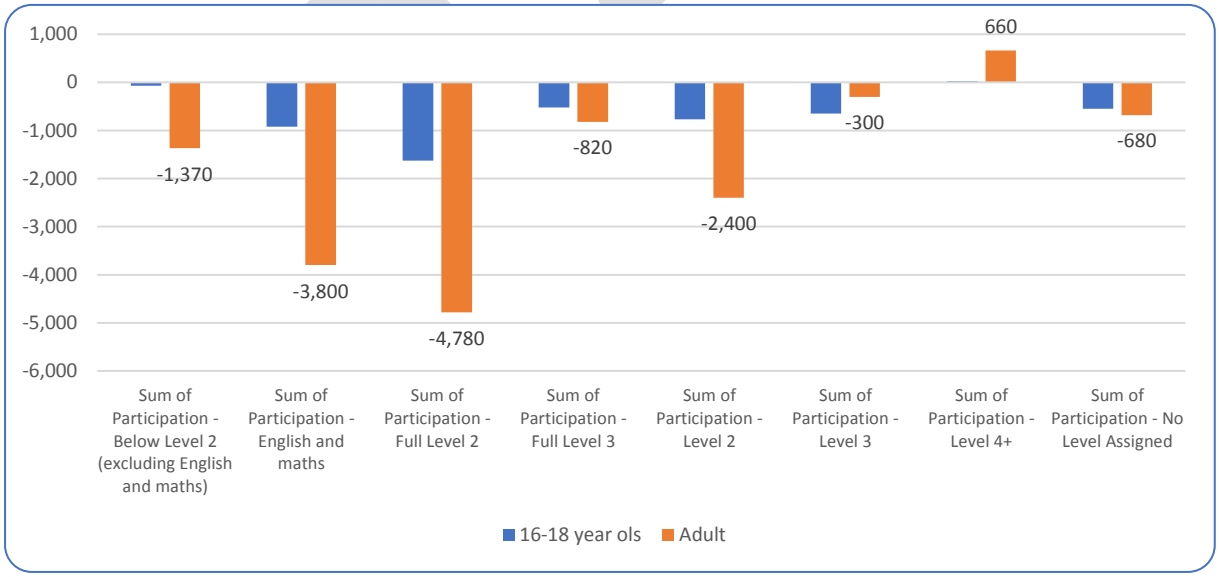


Figure 143. Change in FE participation by age (2014-15 to 2017-18 – postcode of learner) – DLEP. Further education and skills data – DfE and ESFA

Figure 144 illustrates that between 2014-15 and 2017-18 academic years approximately 2,500 fewer adult learners within DLEP have achieved Level 2 qualifications. The high-level observation that this leads to is that this may have an impact on aspects of social mobility (as discussed earlier) and/or workforce productivity.

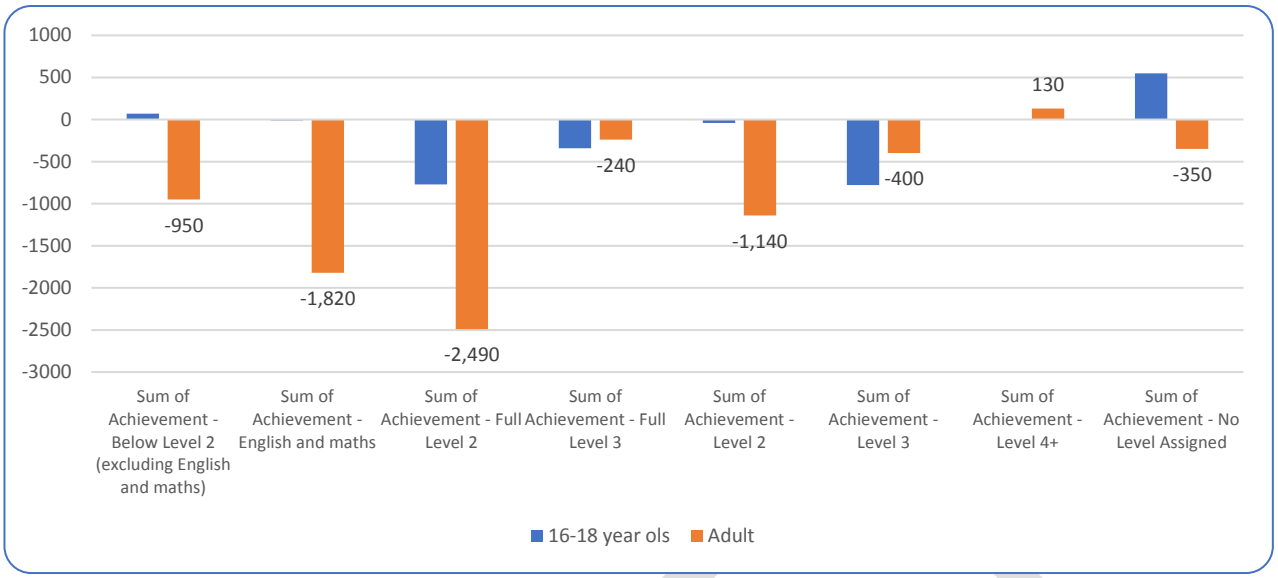
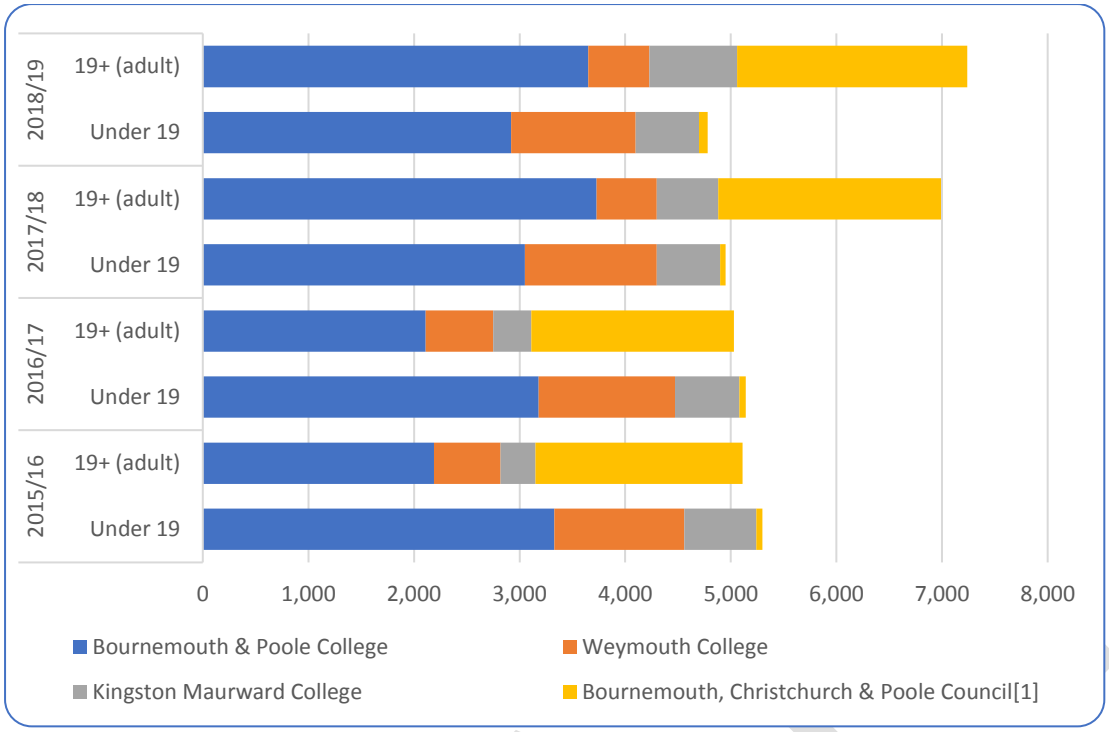


Figure 144. Change in FE achievement by age (2014-15 to 2017-18 – postcode of learner) – DLEP. Further education and skills data – DfE and ESFA

However, despite these broad trends, further analysis of the DfE data at a provider-level indicates that these trends have not necessarily been experienced by the main FE providers in Dorset LEP. In fact, the number of adult learners has held up through the main FE providers.

One possible explanation of the difference in trends is that participation has fallen through other private providers and/or the level of remote learning may have fallen (for example, online learning). The provision of FE and Skills Funded Learners is shown in the subsequent tables, detailing the three main FE providers and also Bournemouth, Christchurch and Poole Council which is a significant provider of adult and community learning (formerly led/provided via Borough of Poole Council before the merging of the local authorities).



	2015/16		2016/17		2017/18		2018/19	
	Under 19	19+ (adult)	Under 19	19+ (adult)	Under 19	19+ (adult)	Under 19	19+ (adult)
Bournemouth & Poole College - participation	3,330	2,190	3,180	2,110	3,050	3,730	2,920	3,650
Weymouth College - participation	1,230	630	1,290	640	1,250	570	1,180	580
Kingston Maurward College - participation	680	330	610	360	600	580	600	830
Bournemouth, Christchurch & Poole Council[67] - participation	60	1,960	60	1,920	50	2,110	80	2,180

Table 36. Table and chart - FE Participation. Further education and skills data – DfE and ESFA

[67] Formerly provided via Borough of Poole Council

Apprenticeship Participation

Key points

- Apprenticeships are one way in which the Government intends to address the skills gaps, the social mobility issues and the productivity problem in the UK.
- There is strong evidence that apprenticeships are an effective tool to improving social mobility, e.g. nationally there is a 16% boost to wages for learners from disadvantaged backgrounds who complete their apprenticeship training, compared to 10% for others68.
- However apprenticeship participation has declined nationally by 20% in 2018/19 compared to 2016/17 and mirroring these trends, the apprenticeship starts in Dorset have fallen by 24% over the same period. There were also 23% less apprenticeship achievements in Dorset in 2018/19 compared to 2017/18.
- The drop-out rates within apprenticeships have been noted as a concern nationally, with approximately 35% of those who start apprenticeships not achieving them69 with particular questions raised around social mobility.
- National data shows the decline in starts has been even more pronounced amongst those from disadvantaged backgrounds (36%), meaning those that benefit the most from an apprenticeship are less likely to start and complete one 68.
- Latest national figures show that COVID-19 has caused a significant further disruption to apprenticeship starts and 48% decline was recorded over the period 23 March – 31 May 2020 on that period last year70.
- Prior to the coronavirus, the fall in apprenticeship starts has largely been associated with the 2017 reforms of the apprenticeship system which introduced the apprenticeship levy and apprenticeship service and changed the funding regimes with an emphasis on higher level qualifications.
- Consequently, we find that the falling number of apprenticeship starts in Dorset is mainly accounted for by:
    - the decline in intermediate apprenticeships starts (c.1760 less intermediate apprenticeships started in 2018/19, compared to 2016/17, marking a 41% decrease over that period)
    - the decline in female uptake of apprenticeships - there were c.1270 less women starting an apprenticeship in 2018/19, compared to 2016/17, marking a 34% decrease
    - the decline in apprenticeship starts among learners aged between 19 and 24 (c/820 less learners from this age group started an apprenticeship in 2018/19 in Dorset compared to 2016/17 – marking a decline of almost 30%)
    - the decline in apprenticeships delivered by private training providers (c.1430 less apprenticeships starts delivered by private providers in 2018/19 compared to 2016/17 – marking a decline of 36%)
- There has been a shift into higher apprenticeships which have almost doubled (and accounted for 14% of all apprenticeship starts in 2018/19 from just 5% in 2016/17).

[68] 'Apprenticeships and social mobility' – Social Mobility Commission, June 2020

[69] National Achievement Rate Tables March 2020, DfE, 2020 - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/874731/NARTs_statistical_release_201819.pdf

[70] Apprenticeships and traineeships: June 2020, DfE - https://www.gov.uk/government/statistics/apprenticeships-and-traineeships-june-2020

Introduction to Apprenticeships

From a policy perspective, apprenticeships are one way in which the Government intends to address the skills gaps summarised in the Industrial Strategy and help address the social mobility issues and the productivity problem in the UK as well as the fall in employers investment in training over recent decades.

Table 37. Levels of apprenticeship and equivalent educational levels.

Name	Level	Equivalent Educational Level
Intermediate	2	GCSE
Advanced	3	A level
Higher	4,5,6 and 7	Foundation degree and above
Degree	6 and 7	Bachelor's or master's degree

People over the age of 16 are eligible to start an apprenticeship, and the programme is available for both new and exising employees. An apprenticeship combines paid work with study and is a direct route into the workplace and an occupation for both young people and those changing careers later in life. Apprenticeships are available at a range of levels, from GCSE-equivalent (level 2) to degree-equivalent (levels 6 and 7), as outlined in Table 37. Apprenticeships must last for at least 12 months, and the apprentice must spend at least 20% of their paid hours doing off-the-job training. The training may be delivered by an authorised provider, the employer or a combination of the two. Government contributes to the cost of apprenticeship training and assessment.

In this part of the report we look at apprenticeship delivery in Dorset focusing mainly on the period between 2016/17 and 2018/19. As of May 2017, reforms have been made to how apprenticeship funding works, including the introduction of the apprenticeship levy and apprenticeship service. More detail describing the changes is available from the Apprenticeship Statistics Hourse of Commons Briefing paper from April 2020. As we will find, the profile of apprenticeship starts has changed significantly since the introduction of the levy which, along with the introduction of apprenticeship standards, has impacted on the number and nature of apprenticeship starts and participation, both nationally and in Dorset.

With the COVID-19 pandemic breakout and lockdown, significant decline in the volume of apprenticeship starts and delivery are anticipated in 2020. The June 2020 monthly apprenticeship data for England[71] including data relating to the period affected by COVID-19, indicates apprenticeship starts have fallen by almost a half (47.9 per cent) nationally over the period between 23 March and 31 May 2020, compared to the same point last year.

Apprenticeship Starts and Achievements in Dorset

Mirroring the national trends of falling numbers of apprenticeship starts over recent years, in Dorset we have seen a 24% drop in the number of apprenticeship starts between 2016/17 and 2018/19 (national reference figure was 20%[72]). As illustrated in Figure 145, there were c.6,520 apprenticeships started in 18/19 in Dorset compared to 8,540 started in 2016/17.

[71] Apprenticeships and traineeships: June 2020, DfE - https://www.gov.uk/government/statistics/apprenticeships-and-traineeships-june-2020

[72] Apprenticeship and traineeships: annual data DfE

Nationally, recent reports highlighted a more significant decline (by 36% between 2015/16 and 2017/18) in apprenticeship starts for people from disadvantaged backgrounds. This raises concerns on the effectiveness of the programme in reaching those that could benefit the most from it in social mobility terms. The Social Mobility Commission reported there is a 16% boost to wages for learners from disadvantaged backgrounds who complete their training, compared with 10% for others, however they were less likely to start and complete an apprenticeship[73].

The breakdown into lower geographies (Figure 146 and Figure 147) illustrates the decrease in overall numbers applies to lower geographies as well.
Genarlly speaking, more apprenticeships were started and completed in Dorset Council area than in BCP -an average of 60% of all apprenticeship starts and achievements in the county were delivered in Dorset Council area. The apprenticeship starts in BCP Council area have seen a 26% fall since 2016/17 compared to 22% in Dorset Council.

It is important to note that 'starts' and 'achievements' are not necessarily 'time aligned'. The difference in the number of starts and the number of achievements merely reflects that more apprenticeships were started then completed over a particular period. This data will capture some element of 'drop-out' i.e. non-completion and non-achievment, but also partially reflects the time alignment issue. Figure 145 shows there 3600 apprenticeships achieved in 18/19 in Dorset compared to 4690 achieved in 2017/18, which marks a 23% decline in the number of achievements over the past year.

The drop-out rates within apprenticeships have been noted as a concern nationally, with particular questions raised around social mobility. At a national level, it is estimated that approximately 35% of those who start apprenticeships do not achieve them.[74] Even though data on the social background of those dropping out is sparse, there is some evidence that more affluent young people who have the resource to navigate the skills system have better retention[75].

It has been argued that the focus on apprenticeship starts rather than completions (achievments) obscures the large number of people who fail to complete their apprenticeships successfully.

[73] 'Apprenticeships and social mobility' – Social Mobility Commission, June 2020
[74] National Achievement Rate Tables March 2020, DfE, 2020 - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/874731/NARTs_statistical_release_201819.pdf
[75] 'Apprenticeships and social mobility' – Social Mobility Commission, June 2020

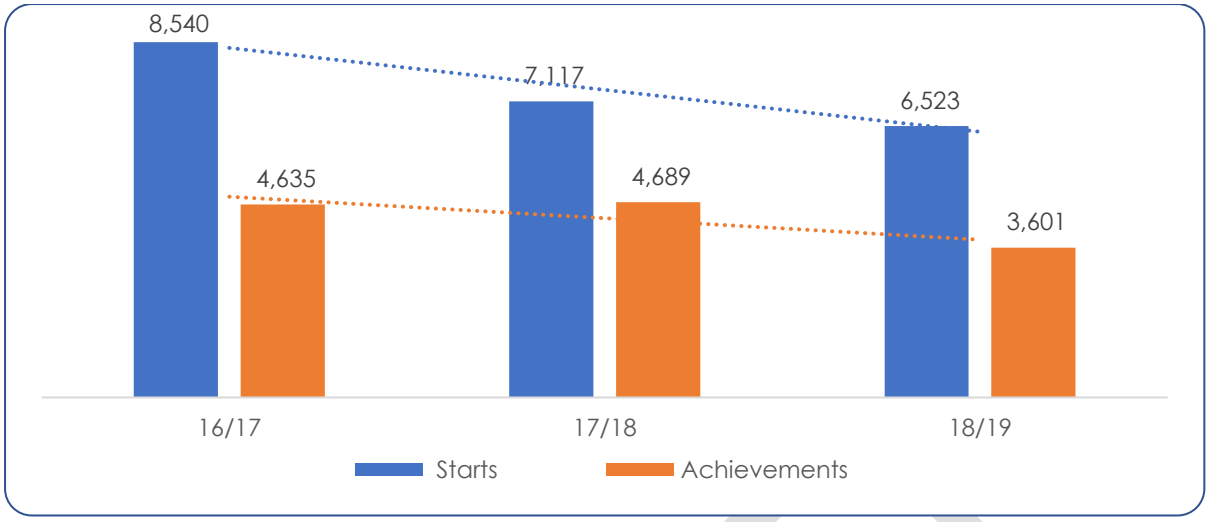


Figure 145. Dorset LEP Apprenticeship starts/ achievements 2016/17 – 18/19. Datacube (Learner Delivery)

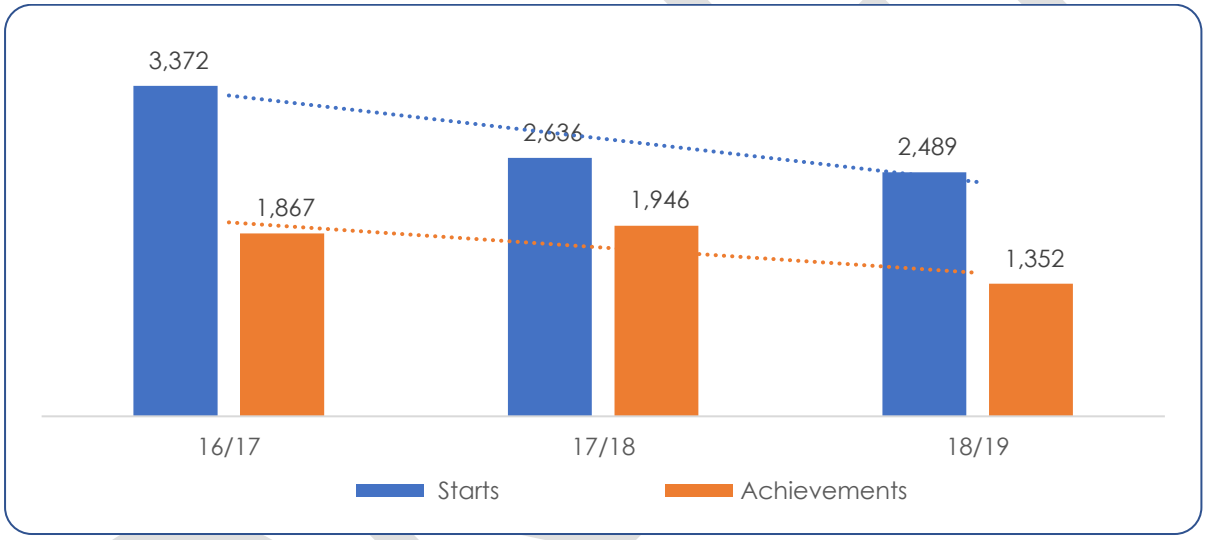


Figure 146. Bournemouth, Christchurch and Poole Council Apprenticeship starts and achievements 2016/17 – 2018/19. Datacube (Learner Delivery)

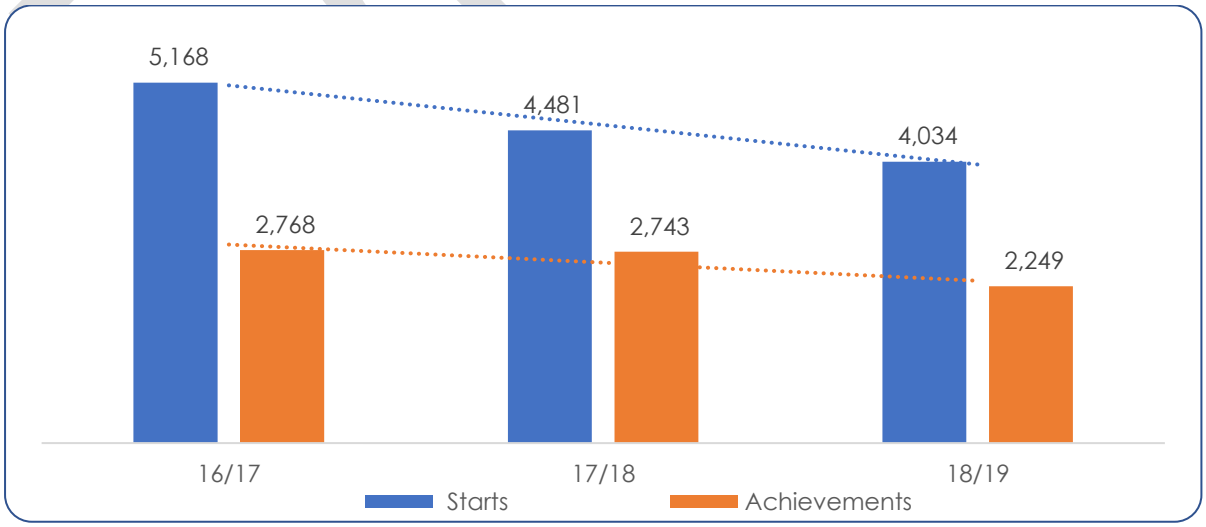


Figure 147. Dorset Council Apprenticeship starts and achievements 2016/17 – 2018/19. Datacube (Learner Delivery)

Apprenticeship Levels

Another trend over recent years directly related to the 2017 apprenticeship reforms is an increase in higher apprenticeship starts (Level 4 and above), a decrease in advanced (A Levels, Level 3) and a more pronounced fall in intermediate apprenticeships (GCSE, Level 2). A comparison of apprenticeship starts by level of study over the past few years is shown in Figure 149, their proportions by level in 2018/19 vs 2016/17 are illustrated in Figure 148, and the differences are indicated in Figure 150.

Figure 150 illustrates that advanced apprenticeship starts fell by almost a fifth (-18%) between 2016/17 and 2018/19, while intermediate apprenticeships saw the biggest drop in starts over that period (-41%). As shown in Figure 148, back in 2016/17 intermediate apprenticeships accounted for half of all apprenticeship starts, while in 2018/19 their proportion fell to 38%. This trend is set to continue with recent national figures released showing the proportion of intermediate apprenticeships further affected by COVID-19 and falling to just over a quarter (27%) of all starts between 23 March and 31 May 2020[76] (from 37% in 2018/19).

Higher apprenticeships have almost doubled (and accounted for 14% of starts in 2018/19 and 18% nationally from just 5% in 2016/17). Again this is set to be a sustained trend as indicated by the provisional national data from 23 March until 31 May 2020 showing higher apprenticeships accounted for 31% of starts nationally.

In terms of apprenticeship levels at lower geographies, the trends seen earlier of increased numbers of higher apprenticeships, and decline in intermediate apprenticeships apply for both local councils, but are more pronounced in BCP Council. In BCP higher apprenticeship starts more then doubled, while intermediate fell by over a half in 2018/19, compared to 2016/17(Figure 152 and Figure 153) and similar trends were seen in achievements (Figure 154 and Figure 155).

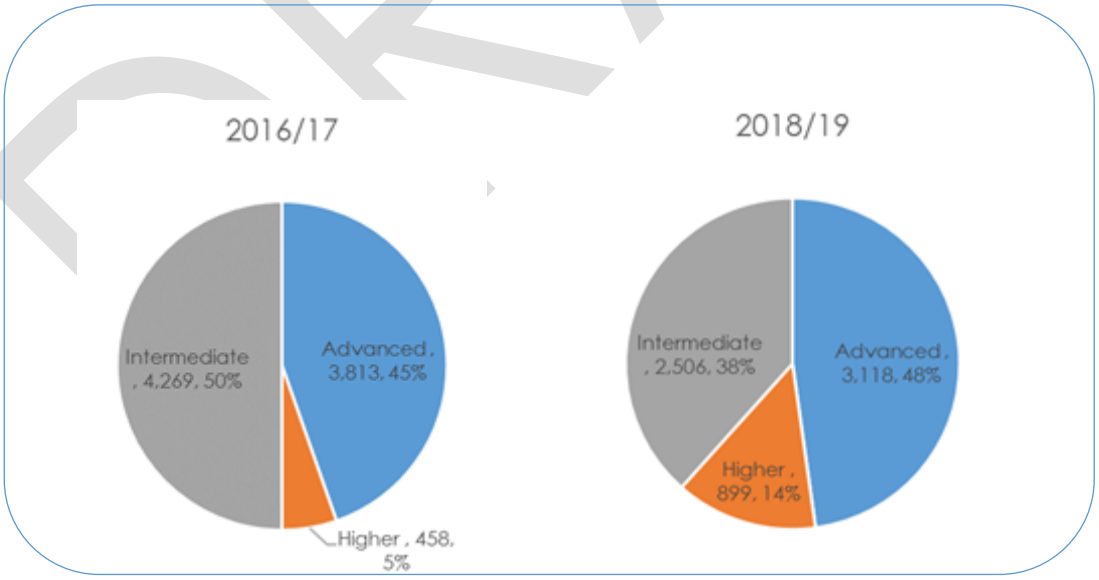


Figure 148. Proportions of apprenticeship levels – Dorset LEP 2016/17 with 2018/19 comparison

[76] **Apprenticeships and traineeships: June 2020, DfE**

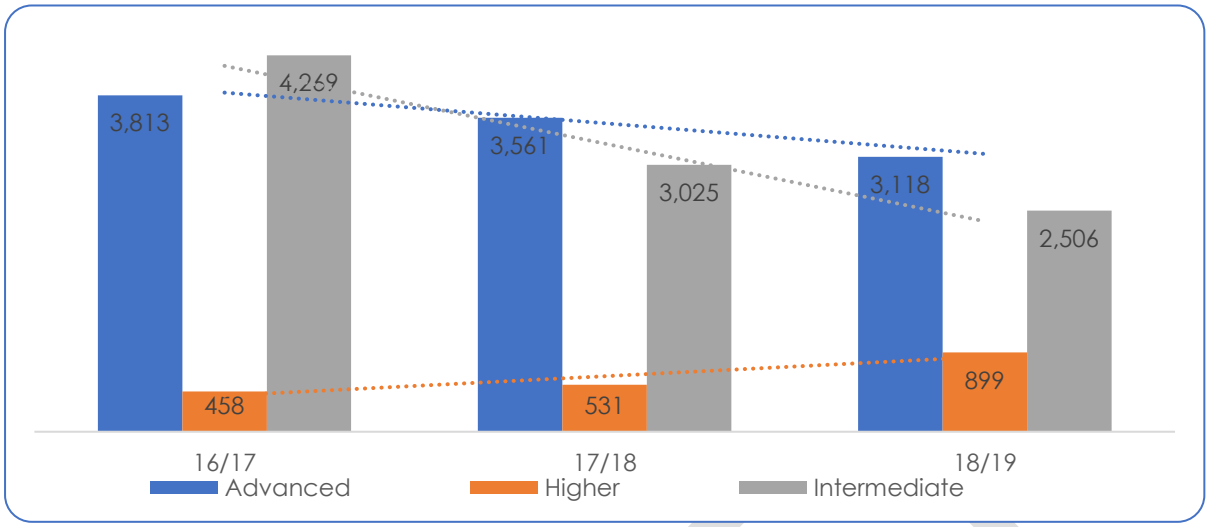


Figure 149. Dorset LEP Apprenticeship starts 2016/17 – 2018/19 by level (by Start Academic Year). Datacube (Learner Delivery)

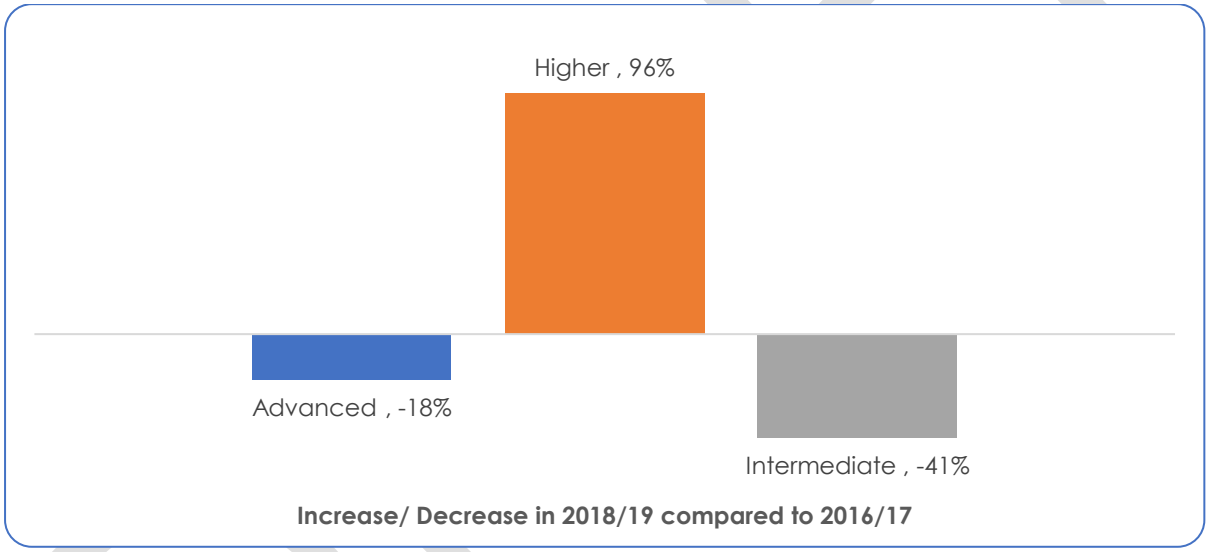


Figure 150. Change in starts by Apprenticeship level in 2018/19 from 2016/17 (Dorset LEP)

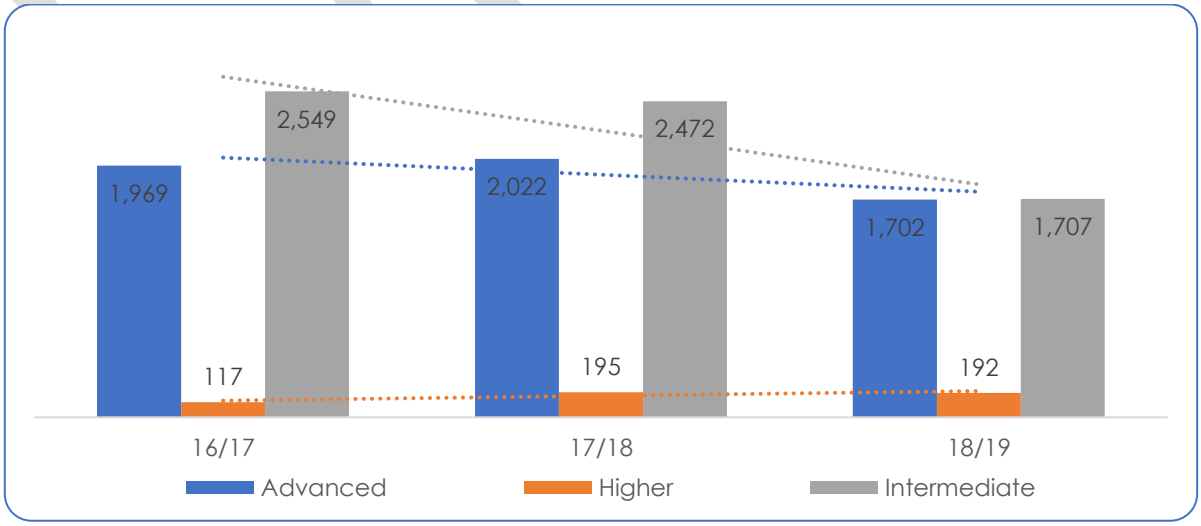


Figure 151. Dorset LEP Apprenticeship achievements 2016/17 – 2018/19 by level (by Leave Academic Year). Datacube (Learner Delivery)

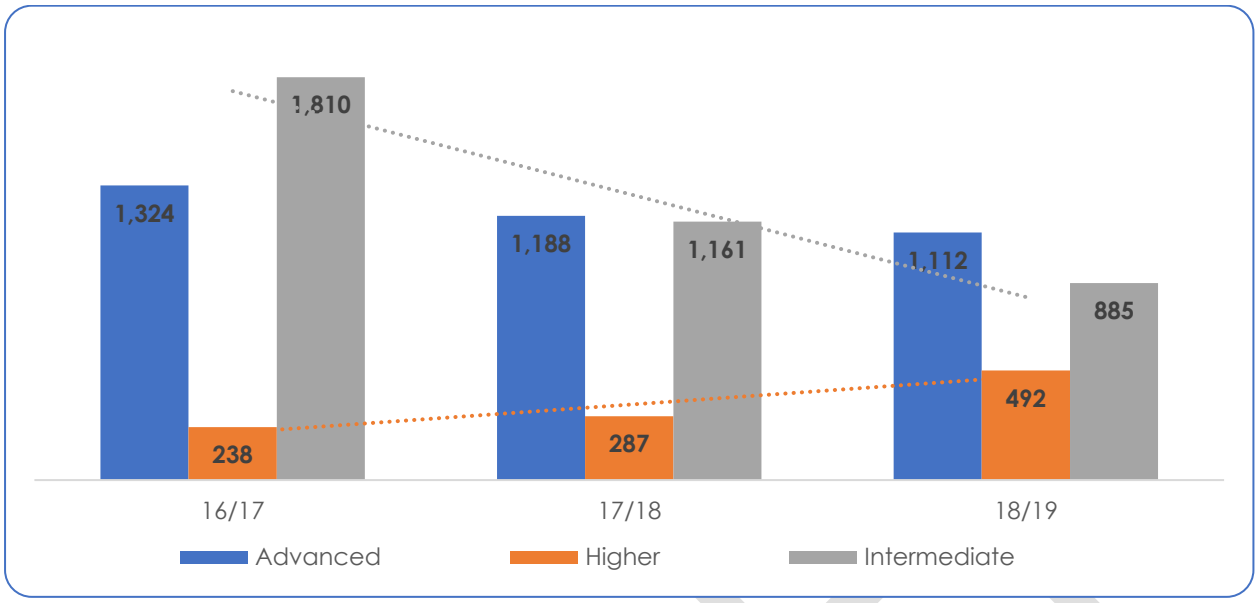


Figure 152. BCP Council Apprenticeship starts 2016/17 – 2018/19 by level (by Start Academic Year). Datacube (Learner Delivery)

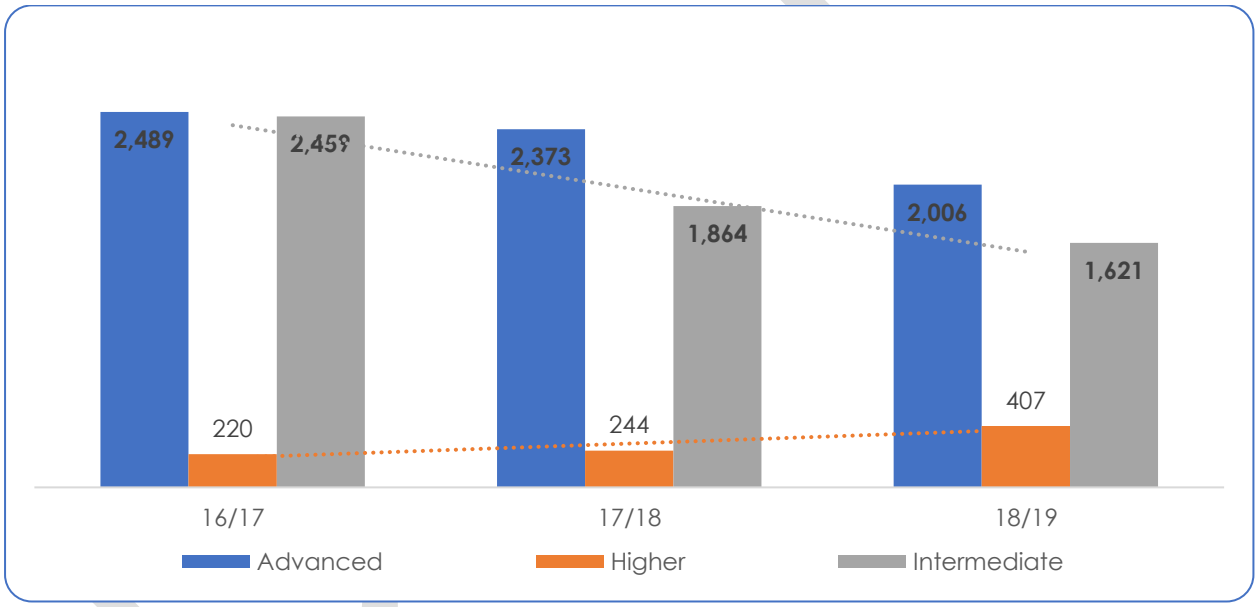


Figure 153. Dorset Council Apprenticeship starts 2016/17 – 2018/19 by level (by Start Academic Year). Datacube (Learner Delivery)

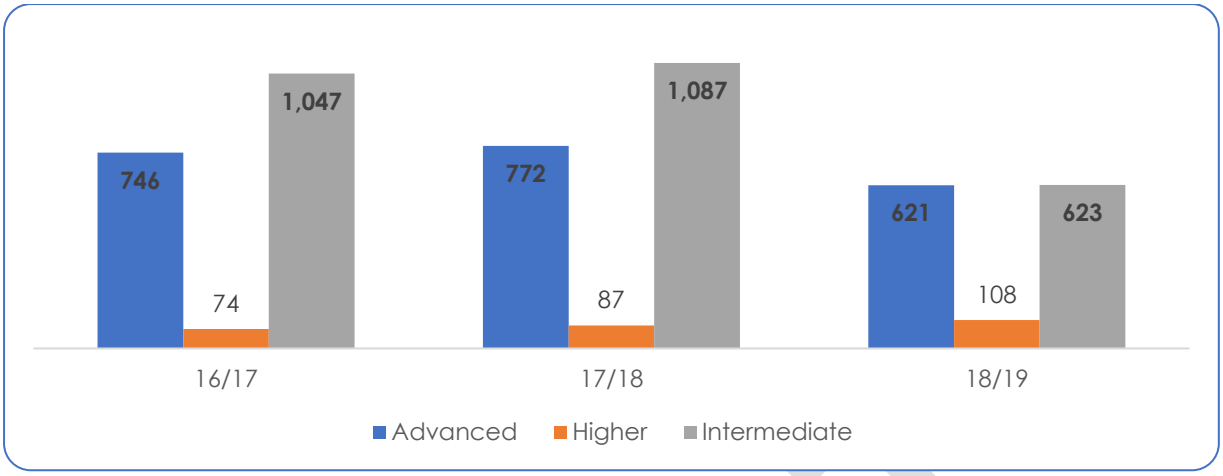


Figure 154. BCP Council Apprenticeship achievements 2016/17 – 2018/19 by level (by Leave Academic Year). Datacube (Learner Delivery)

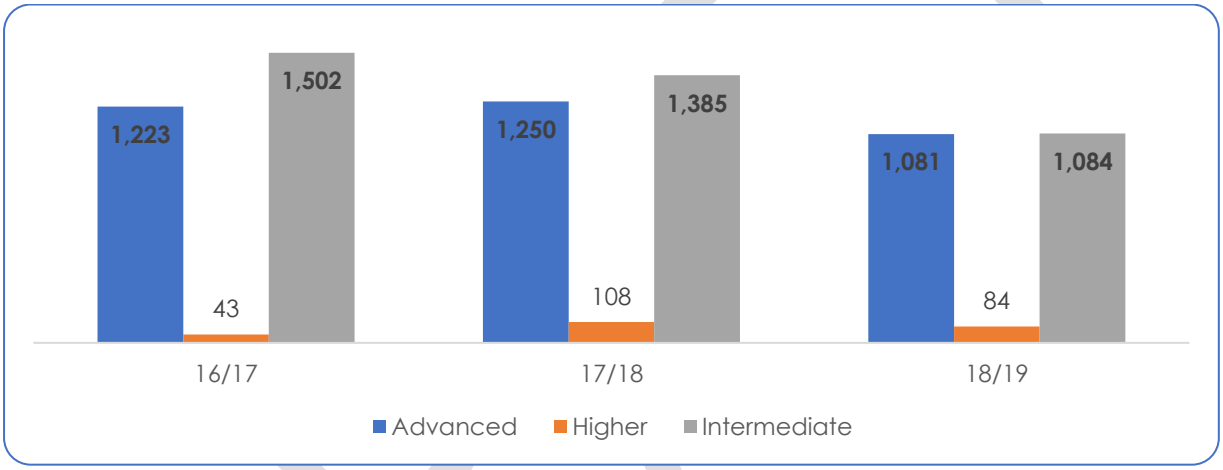


Figure 155. Dorset Council Apprenticeship achievements 2016/17 – 2018/19 by level (by Leave Academic Year). Datacube (Learner Delivery)

Apprenticeship Content

The content of each apprenticeship is set out in a 'framework' or a 'standard'. Frameworks are phased out in favour of standards, which are designed by employer groups from the relevant sector, and consist of occupational standard (setting out the knowledge, skills and behaviours the apprentice will need) and an endpoint assessment.

In terms of broad representation of sectors subject areas, the apprenticeship activity in Dorset over 2018/19 has been concentrated in Engineering and Manufacturing Technologies (24%), Health, Public Services and Care (22%), ICT (16%) and Business, Administration and Law (16%), which together made up c.80% of all apprenticeship starts(Figure 156). The biggest fall since 2016/17 has been in health related apprenticeships (Figure 158).

Nationally, recent data suggests that these four subject areas have seen a significant further fall (48% on average) in starts over the COVID-19 lockdown period (23 March – 21 May 2020) with the biggest decline in Engineering starts (68%). There was also a fall in commitments and advertised apprenticeship vacancies before the coronavirus outbreak[77].

[77] Apprenticeships and traineeships: June 2020, DfE

Over 2018/19, the biggest numbers of advanced (Level 3, A level equivalents) apprenticeships were associated with ICT, healthcare, engineering and business administration and law.

Apprenticeships by framework sector subject	Starts 16/17	Achievements 16/17	Starts 17/18	Achievements 17/18	Starts 18/19	Achievements 18/19
Agriculture, Horticulture and Animal Care	177	140	172	113	165	115
Arts, Media and Publishing	7	7	4	5	10	3
Business, Administration and Law	1,338	693	1,086	738	1,064	457
Construction, Planning and the Built Environmen	227	137	245	153	246	123
Education and Training	91	67	74	47	48	54
Engineering and Manufacturing Technologies	2,028	1141	1,769	1226	1,554	1086
Health, Public Services and Care	2,278	1189	1,420	1189	1,421	790
Information and Communication Technology	1,054	443	1,316	428	1,073	426
Leisure, Travel and Tourism	230	160	162	129	134	136
Retail and Commercial Enterprise	1,108	656	868	660	808	411
Science and Mathematics	2	2	1	1	0	0

Figure 156. Dorset LEP Apprenticeship starts and achievements 2016/17 – 2018/19 by Framework Sector Subject. Datacube (Learner Delivery)

Higher volumes of intermediate apprenticeships (Level 2, GCSE equivalents) were prevalent in engineering, healthcare and retail, while higher apprenticeships (Level 4 and above) were mostly concentrated in business, administration and law and healthcare (Figure 157).

Apprenticeships by subject and level 2018/19	Advanced Starts	Advanced Achieven	Higher Starts	Higher Achievement	Intermediate Starts	Intermediate Achiev
Agriculture, Horticulture and Animal Care	54	43	2	1	109	71
Arts, Media and Publishing	8	2	0	0	2	1
Business, Administration and Law	435	184	410	70	219	203
Construction, Planning and the Built Environmen	63	38	17	0	166	85
Education and Training	26	31	11	0	11	23
Engineering and Manufacturing Technologies	561	383	75	1	918	702
Health, Public Services and Care	641	379	271	101	509	310
Information and Communication Technology	993	398	57	4	23	24
Leisure, Travel and Tourism	82	68	0	0	52	68
Retail and Commercial Enterprise	255	176	56	15	497	220

Figure 157. Dorset LEP Apprenticeship starts and achievements 2016/17 – 2018/19 by Framework Sector Subject and Apprenticeship Level. Datacube (Learner Delivery)

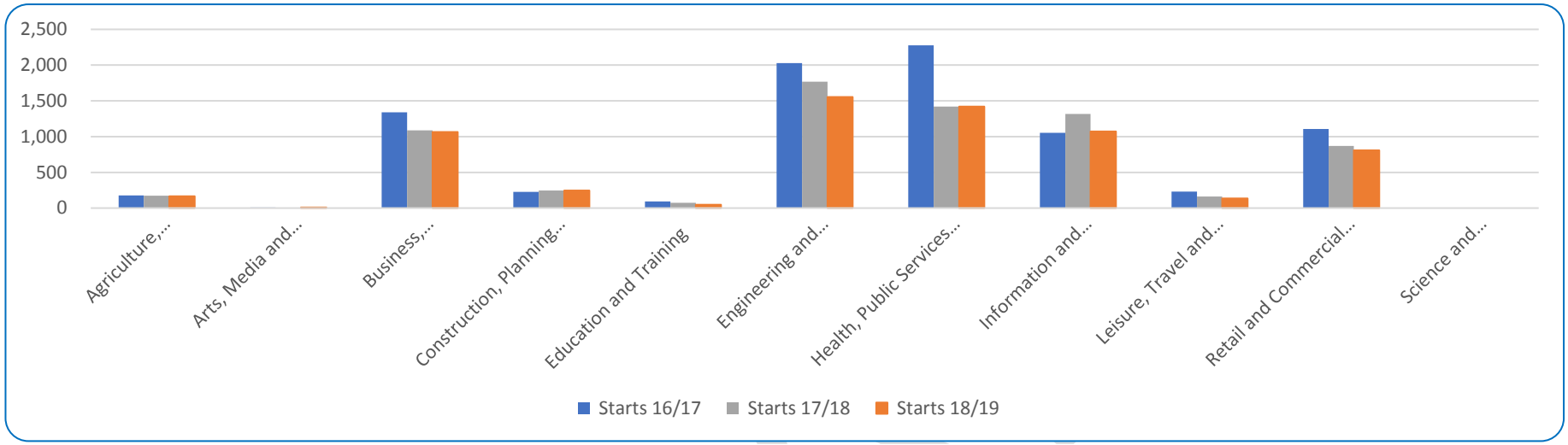


Figure 158. Dorset LEP Apprenticeship starts 2016/17 – 2018/19 by Framework Sector Subject. Datacube (Learner Delivery)

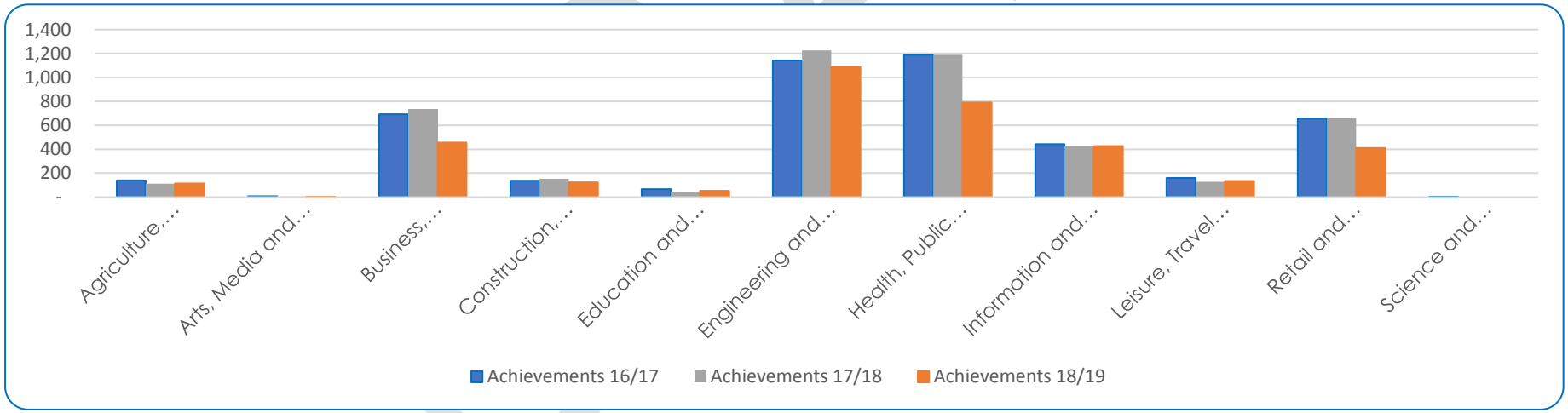


Figure 159. Dorset LEP Apprenticeship achievements 2016/17 – 2018/19 by Framework Sector Subject. Datacube (Learner Delivery)

Learner Characteristics

- **Age**

Apprenticeship starts in Dorset by age profile over the past few years are shown in Figure 161.

As apprenticeship starts have fallen over recent years, this declining trend was seen across all age groups over 16 years of age (Figure 162). The most significant drop of almost 30% however was amongst those aged between 19 and 24.

Learners aged 25 and over are making up the largest proportion of apprenticeship starts. Over the period between 2016/17 and 2018/19 they accounted for an average of 41% of all starts (42% in 2018/19 - Figure 160). Thy are in even higher proportions nationally– 56% in 2018/19, and have increased further over the period affected by COVID-19 to reach almost two-thirds (64%) of all starts between 23 March and 31 May 2020[78].

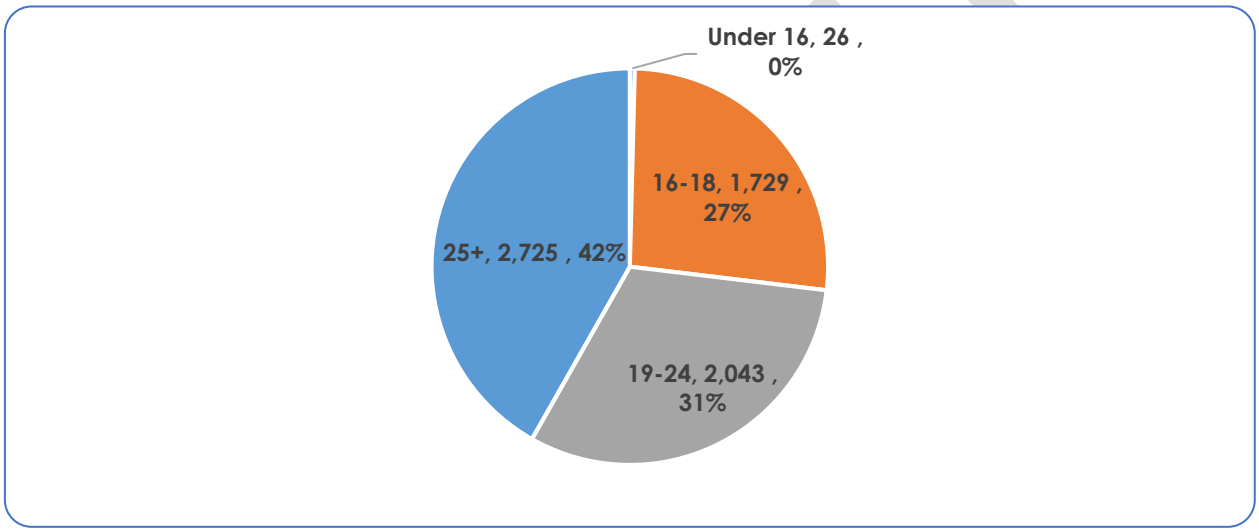


Figure 160. Age Band proportions of Apprenticeship starts (2018/19, Dorset LEP). Datacube (Learner)

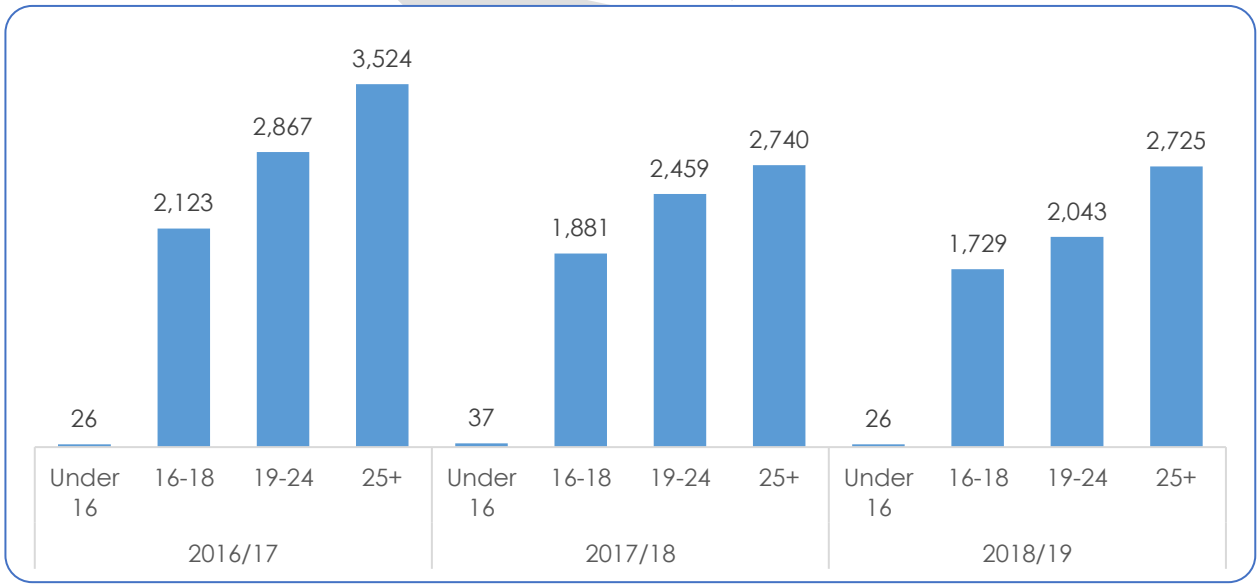


Figure 161. Dorset LEP Apprenticeship starts 2016/17 – 2018/19 by Age Band. Datacube (Learner)

[78] Apprenticeships and traineeships: June 2020, DfE

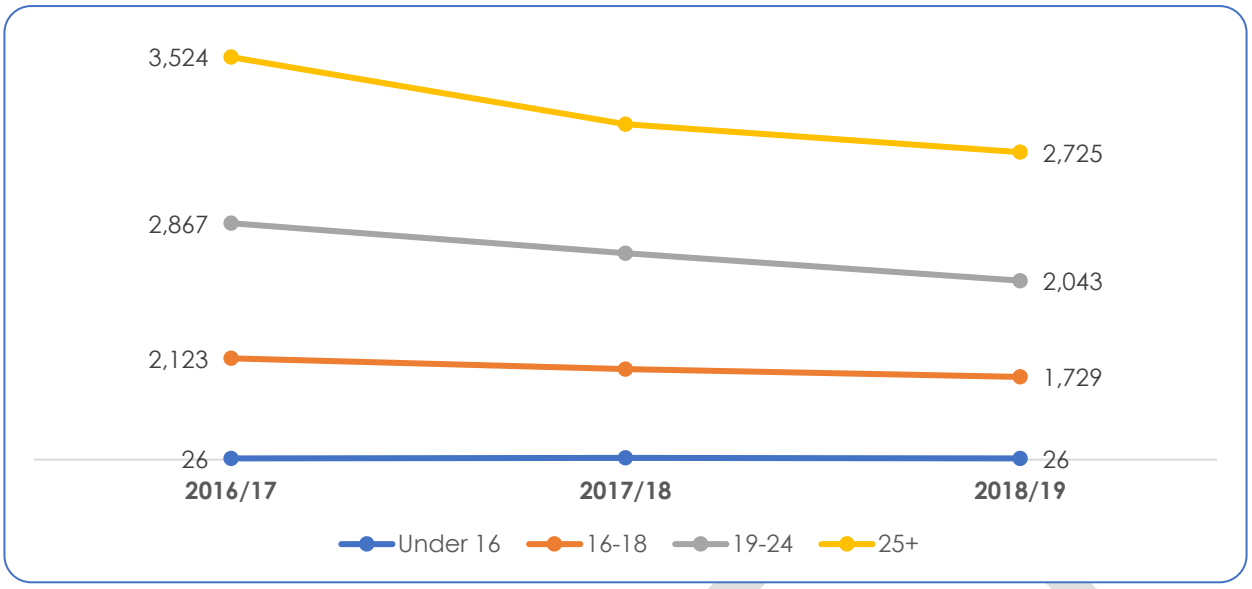


Figure 162. Dorset LEP Apprenticeship starts 2016/17 – 2018/19 by Age Band. Datacube (Learner)

Regarding apprenticeship levels uptake amongst different age groups, these are illustrated in Figure 163 and the changes in terms of increase/ decrease in 2018/19 compared to 2016/17 are shown in Figure 164. This shows that higher apprenticeships have risen across all age groups, but most significantly amongst those aged 19-24, where they have almost tripled in 2018/19 compared to 2016/17. Conversely, both advanced and intermediate appreiceships have fallen across all age bands, but most significantly intermediate apprenticeship starts fell by half amongst all aged 19 and older.

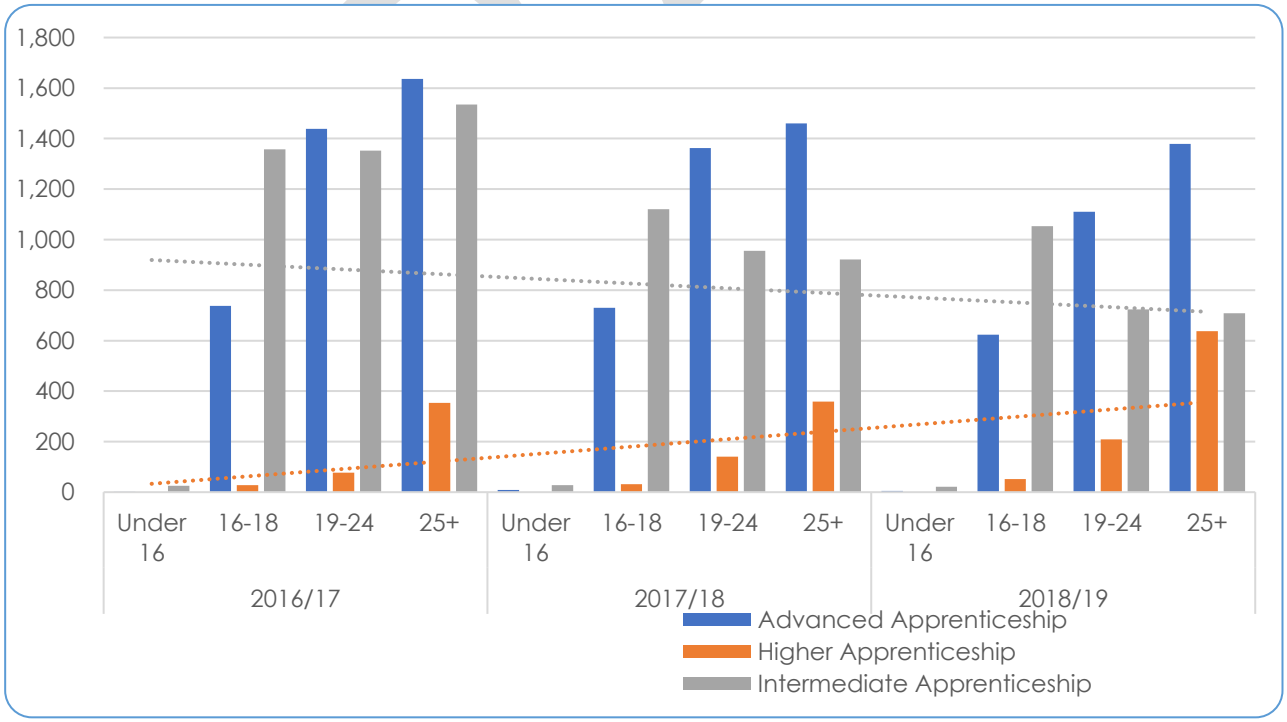


Figure 163. Dorset LEP Apprenticeship starts 2016/17 – 2018/19 by Age Band and Apprenticeship Level. Datacube (Learner Delivery)

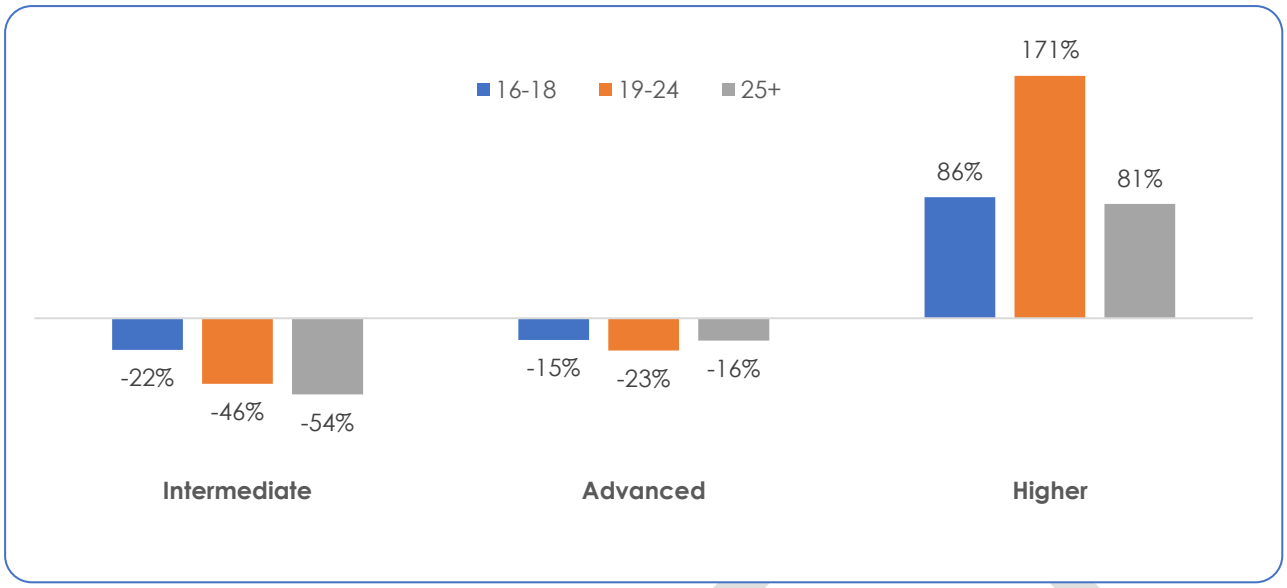


Figure 164. Difference (in 2018/19 compared to 2016/17) in Apprenticeship starts by Age Band and Apprenticeship Level. Datacube (Learner Delivery)

Sector subject area breakdown shows that learners aged 25 and over tend to start an apprenticeship in health related subject area, business,administration and law, or retail and enterprise. Those learners in the 19 to 24 age bracket were more likely to enrol on an ICT or engineering subject apprenticeship.

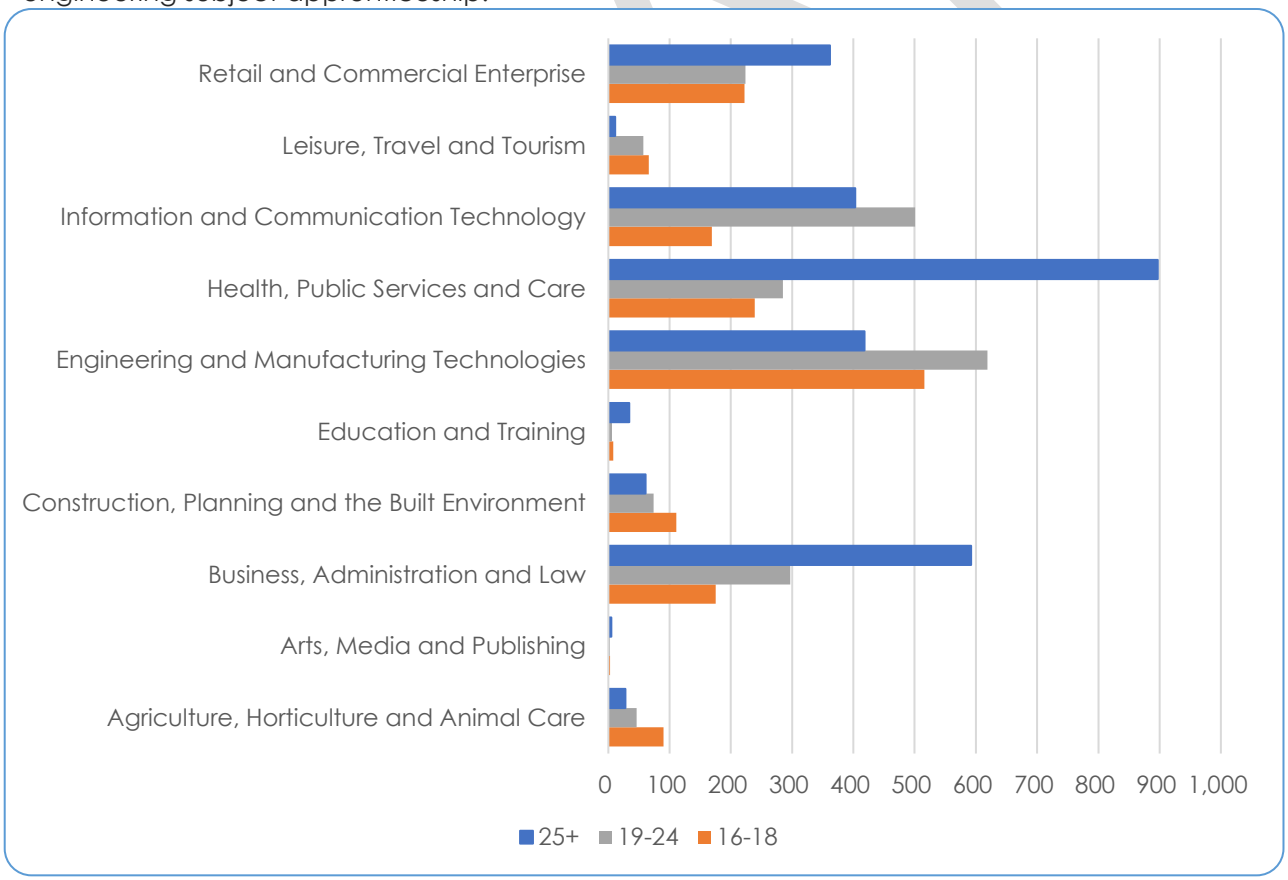


Figure 165. Dorset LEP Apprenticeship starts 2018/19 by Age Band and Sector Subject Area. Datacube (Learner Delivery)

- **Gender**

The gender breakdown in the apprenticeships in Dorset are shown next.

Overall, there are fewer women than men participating in apprenticeships and their proportion from all appreniceships starts in Dorset has decreased from 44% in 2014/15 to 38% in 2018/19 (Table 38).

There were 2,450 women (vs 4,073 men) starting an apprenticeship in 2018/19 in Dorset, which marks a 34% decrease on the 2016/17 female participation levels while the decrease in male apprenticeship starts has been significantly less pronounced (15%) over the same period.

Figure 166 illustrates the number of female apprenticeship starts at different levels since 2016/17 and Figure 167 shows reference figures for their male counterparts. These figures show that both intermediate and advanced apprenticeship starts have seen a decline amongst both men and women with more pronounced decline in female uptake. The biggest fall in female appreniceships have occurred in intermediate apprenticeships which have fallen by over a half over that period.

Higher proportions of women were engaged in subject areas such as education and training (81% of all starts in 2018/19), health and care (78%) and business (57%).

However, the number of women starting an apprenticeship in technology, engineering and construction subject areas has been consistently very low.

In 2018/19 only 8 women (3%) commenced an apprenticeship in construction, planning and the built environment, 55 (4%) in engineering and manufacturing technologies and 84 (8%) in information and communication technologies.

Table 38. Proportion of apprenticeship starts – female (% of total) – Dorset LEP. Datacube (Learner Delivery)

	2016/17	2017/18	2018/19
Intermediate Apprenticeship	41%	35%	33%
Advanced Apprenticeship	43%	36%	36%
Higher Apprenticeship	72%	59%	54%
Totals	**44%**	**37%**	**38%**

Table 39. Proportion of apprenticeship achievements – female (% of total) – Dorset LEP. Datacube (Learner Delivery)

	2016/17	2017/18	2018/19
Intermediate Apprenticeship	43%	41%	33%
Advanced Apprenticeship	44%	46%	38%
Higher Apprenticeship	74%	73%	71%
Totals	**44%**	**44%**	**37%**

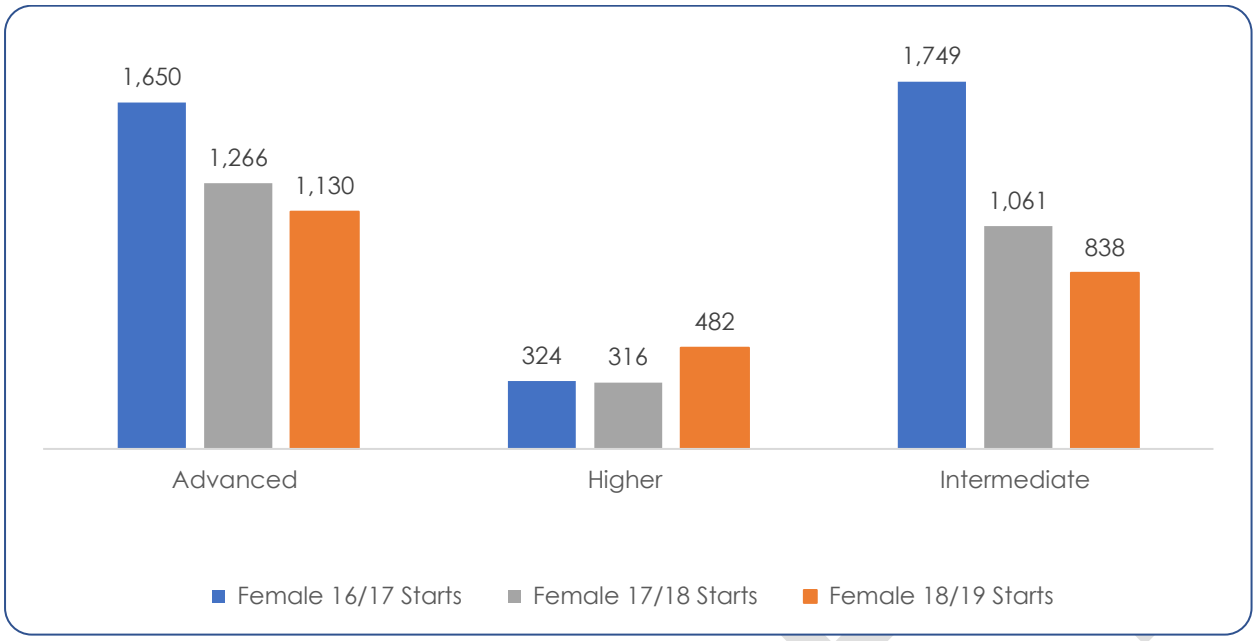


Figure 166. Dorset LEP – Female Apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

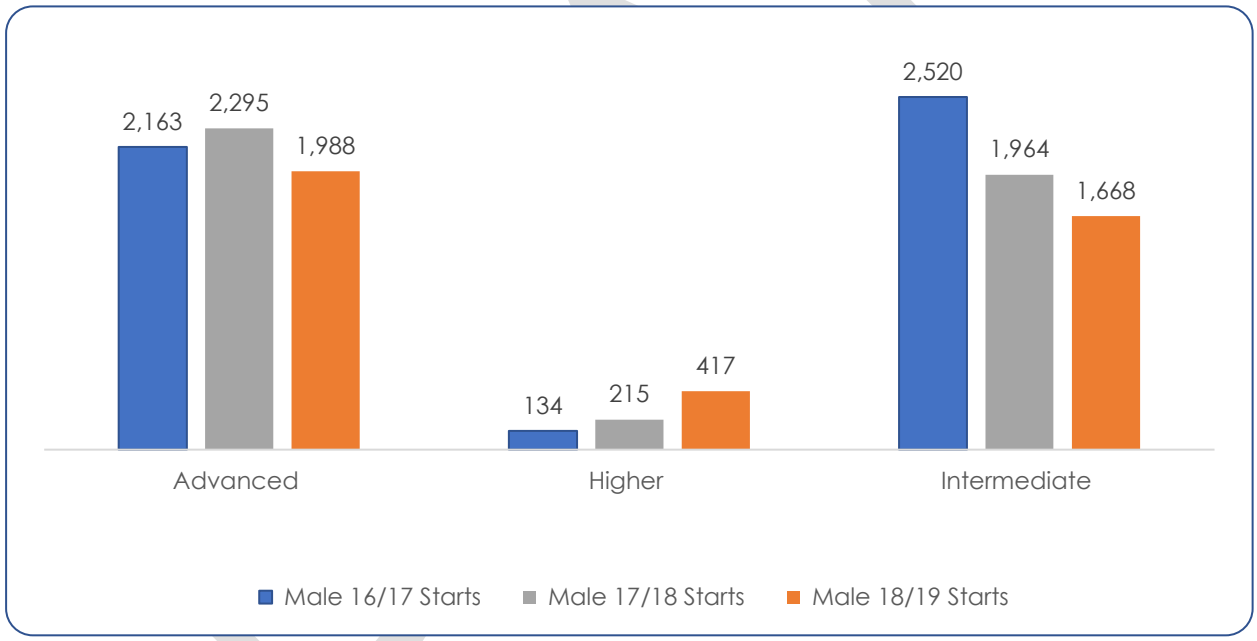


Figure 167. Dorset LEP – Male Apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

- **Learning difficulty and disability**

Table 40 shows the proportion of apprenticeship starts in Dorset by individuals who consider themselves to have a learning difficulty and/or disability and/or health problem. While the overall number of people with learning difficulties and disabilities starting an apprenticeship has fallen, this decrease was less pronounced for this group compared to the overall fall in apprenticeship starts. Therefore, over the past few years their proportion has increased from 11% to 13%. Achivements as a proportion from all achievements has also increased by 2 percent points over recent years (Table 41).

In terms of apprenticeship levels, half of all the apprenticeship starts amongst this group were at intermediate level, and this is the only level of apprenticeships that has seen a decrease in number of starts in 2018/19 compared to 2016/17 amongst those considering themselves as having a learning difficulty or disability.

Table 40. Proportion of apprenticeship starts - learners considering themselves to have a learning difficulty and/or disability and/or health problem– Dorset LEP. Datacube (Learner Delivery)

	2016/17	2017/18	2018/19
Intermediate Apprenticeship	13%	15%	17%
Advanced Apprenticeship	9%	10%	11%
Higher Apprenticeship	9%	8%	10%
Totals	**11%**	**12%**	**13%**

Table 41. Proportion of apprenticeship achievements - learners considering themselves to have a learning difficulty and/or disability and/or health problem– Dorset LEP. Datacube (Learner Delivery)

	2016/17	2017/18	2018/19
Intermediate Apprenticeship	12%	12%	14%
Advanced Apprenticeship	8%	8%	10%
Higher Apprenticeship	8%	5%	4%
Totals	**10%**	**10%**	**12%**

Providers

Full list of providers with recoded apprenticeship starts over the period between 2016/17 to 2018/19 (sorted by type of provider and number of apprenticeship starts in 2018/19) is shown for reference in the Appendix. It has to be noted that this data is based on learners and includes a wide range of providers – some of them outside of Dorset and **it does not include the learners outside of the area, thus may underestimate the delivery data of providers delivering to learners outside of Dorset.** The type of training providers delivering apprenticeships are illustrated in Figure 168.

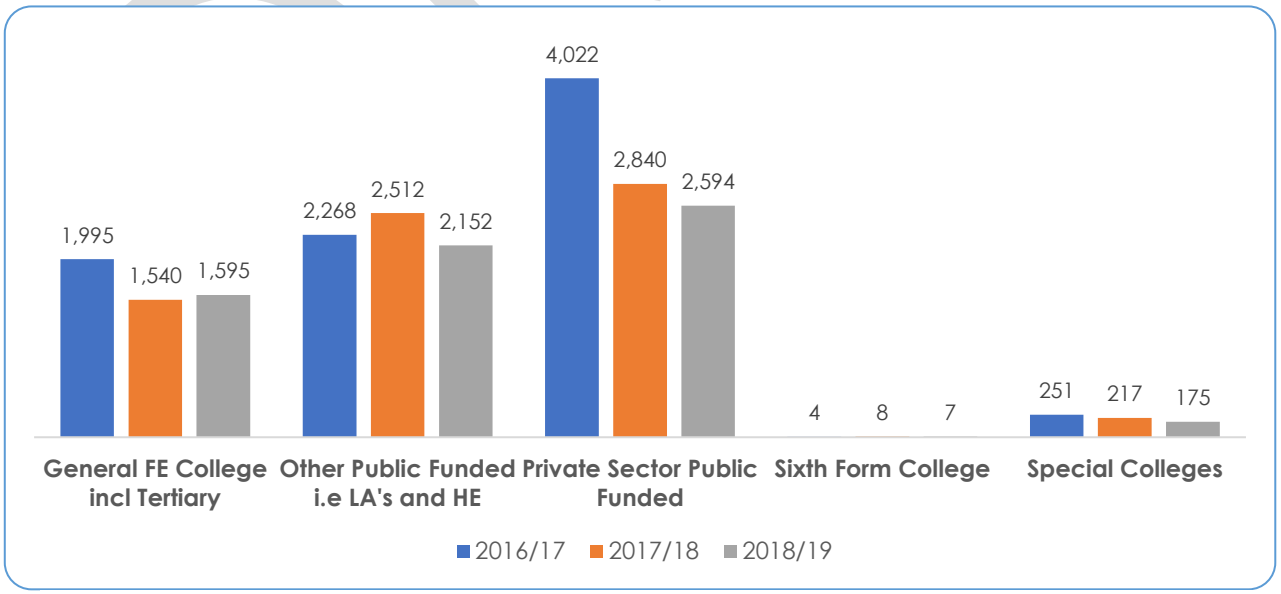


Figure 168. Apprenticeship providers in Dorset LEP by type of provider – 2016/17-2018/19. Datacube (learner Delivery)

- **Private providers**

The largest proportion of apprenticeships (47% of all starts in 2016/17, which fell to 40% in 2018/19) has been delivered by private sector providers. There are a large number of private providers delivering in general smaller numbers of apprenticeships each and have seen the biggest ovarall decline in number of apprenticeship starts (34%) over the period 16/17 to 18/19 (Figure 168).
As detailed in **Error! Reference source not found.**, the top 5 providers amongst them (in terms of number of apprenticeship starts in 2018/19) are:

- Lifetime Training Group (c330 starts in 2018/19),
- Paragon Education and Skills (215 in 2018/19 –less than half of their 2016/17 delivery),
- Quest Vocational Training(c190),
- Aspire Training Team (125),
- HIT training (123 in 2018/19 from 265 in 2016/17)

To highlight the shift we have already seen from intermediate to higher apprenticeships amongst private providers we also illustrate the apprenticeships delivered by these providers by apprenticeship level in Figure 169. This again illustrates the significant decline in intermediate intermediate apprenticeships, within the overall context of declining apprenticeship numbers over the most recent few years. Private providers have delivered over a half (55%) of all the higher apprenticeships starts in Dorset in 2018/19.

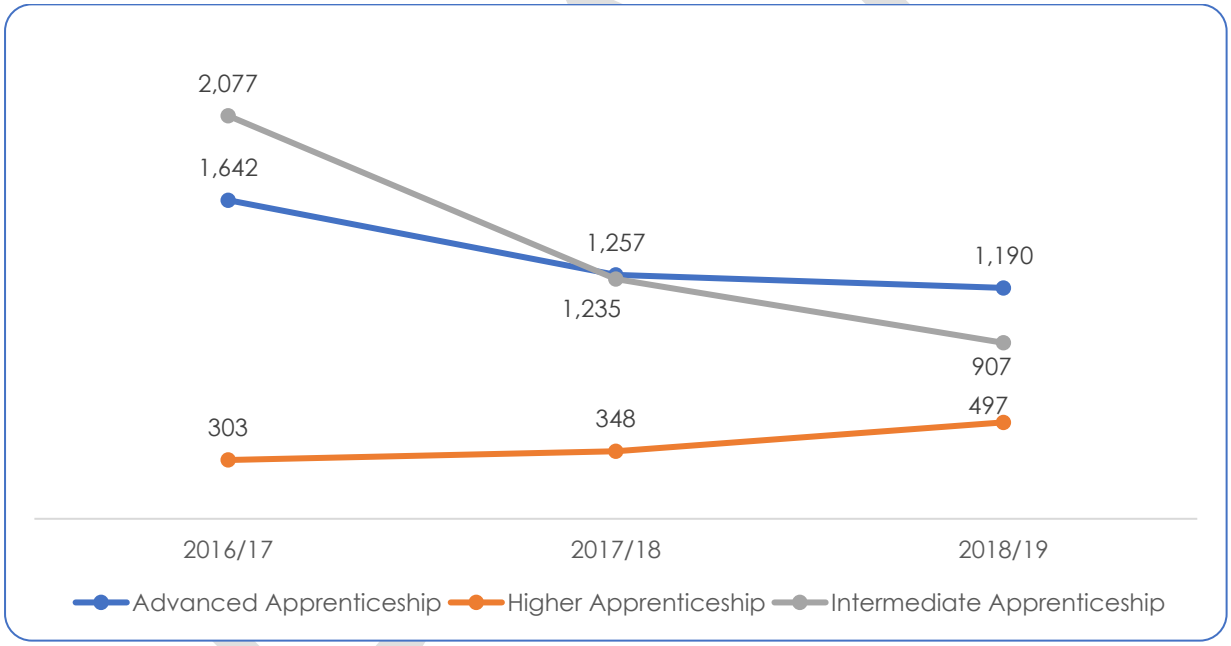


Figure 169. Dorset LEP –Private provider's apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

Generally speaking, private providers delivery concentrated in health and care (c920 starts in 2018/19), business administration and law (c630) and retail and commercial enterprise (c570).
In terms of characteristics of learners, private providers are amongst the largest deliverers of apprenticeships for those aged 25+ (56% of all private provider starts in 2018/19 and 53% of all 25+ starts in Dorset).
They also attracted more women (60% of all starts with private providers and 64% of all female apprenticeship starts in Dorset).
The decline in apprenticeship starts over recent years amongst these providers was also more pronounced amongst older learners (Figure 170) and women (Figure 171).

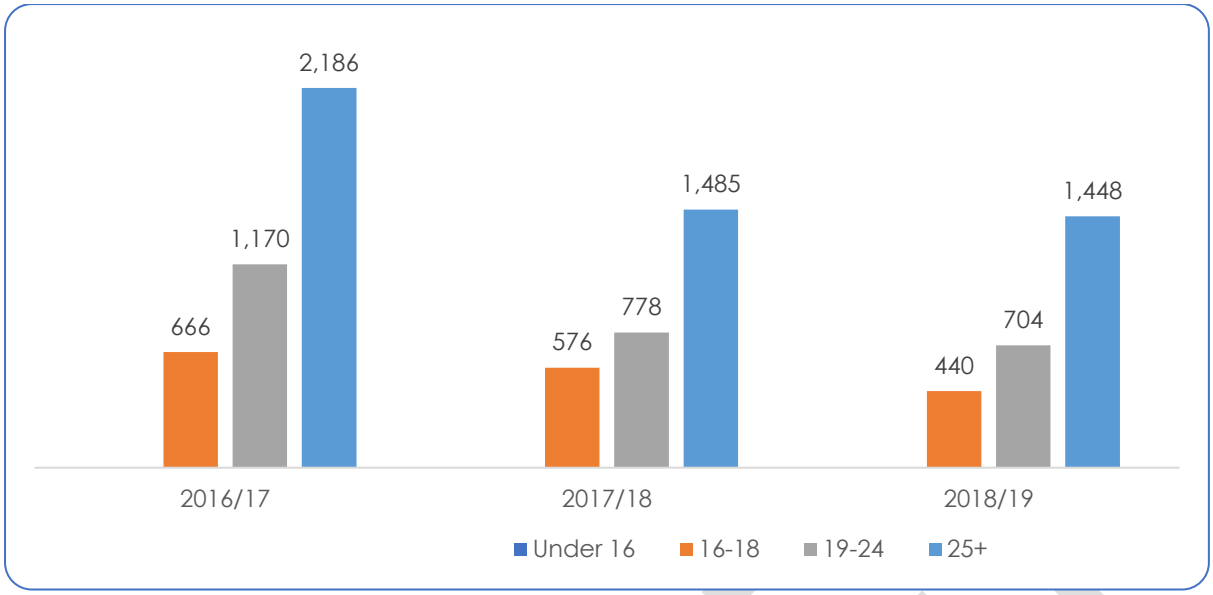


Figure 170. Dorset LEP –Private provider's apprenticeship starts 2016/17 – 2018/19 by Age band. Datacube (Learner Delivery)

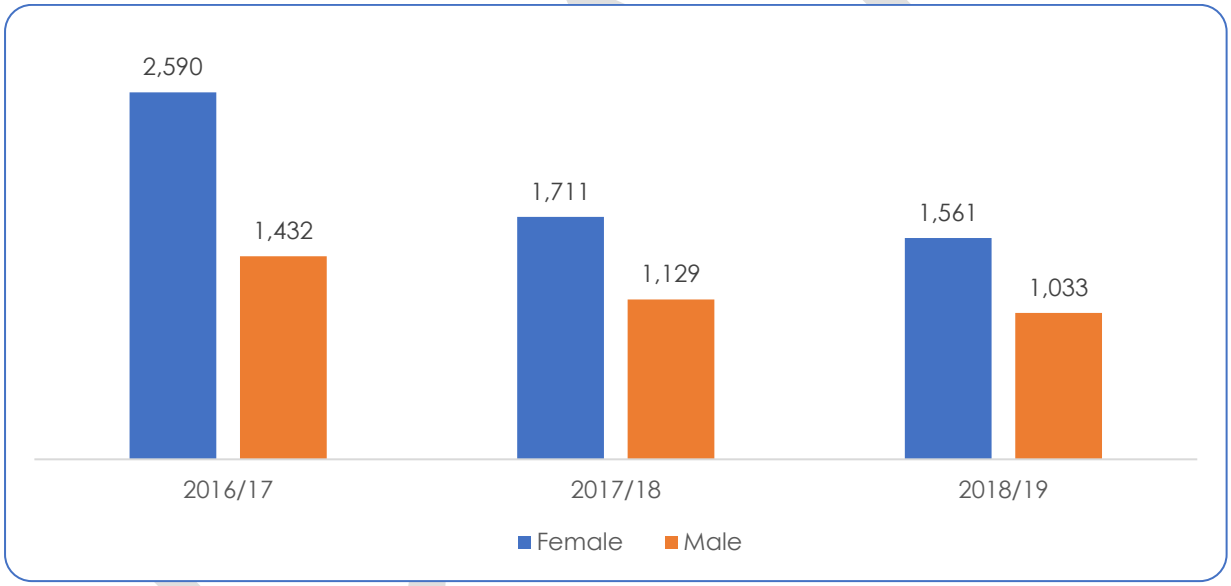


Figure 171. Dorset LEP –Private provider's apprenticeship starts 2016/17 – 2018/19 by gender. Datacube (Learner Delivery)

- **Other Public Funded Providers and HE**

A third of apprenticeships starts in Dorset in 2018/19 (33%) has been delivered by other public funded providers. Among these are a number of higher education institutions, the BCP Council and the Poole Hoospital NHS trust. Within this group is the single largest provider of appreniceships in Dorset - the British Army. The British Army has provided 83% of the apprenticeship starts within this group of providers and 28% of all apprenticeship starts in Dorset in 2018/19.

There has been a slight decline (5%) in number of starts amongst these providers, but far less pronounced than what we saw with private providers. The decline in intermediate apprenticeships was also less marked, while advanced level starts were holding up well and higher apprenticeships increased.

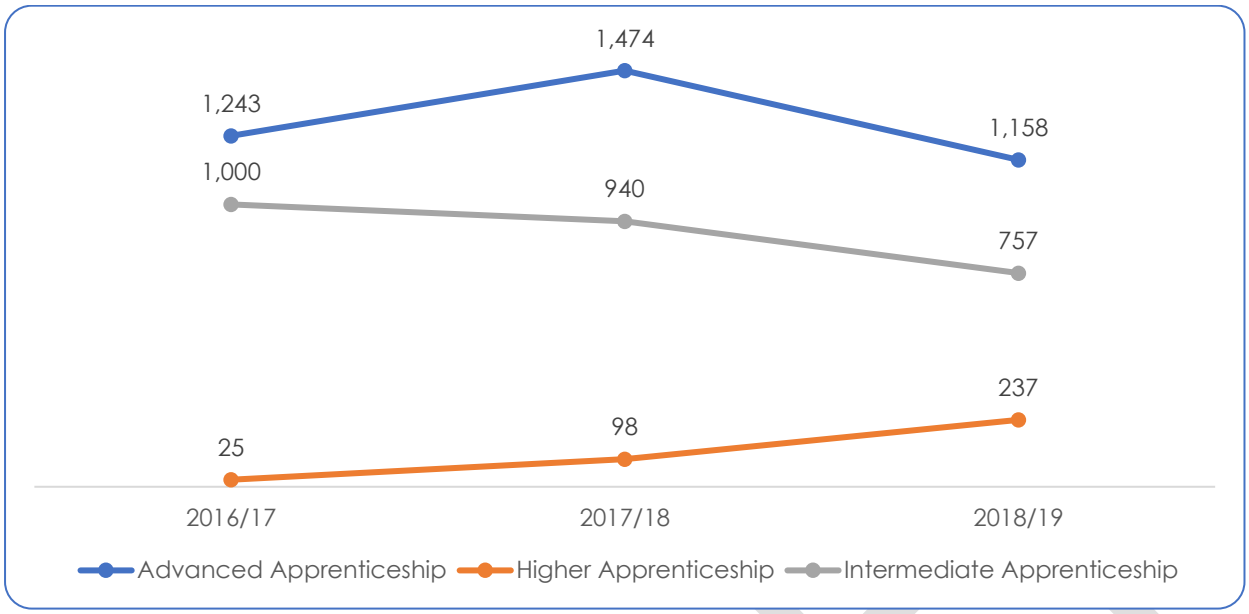


Figure 172. Dorset LEP –Other and HE provider's apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

Contentwise, delivery amongst this group concentrated in ICT (c940 starts in 2018/19) and engineering (c710).

In terms of age range of learners, these providers attracted learners across all age groups, with number of starts amongst those aged between 19 and 24 declining recently (Figure 173).

Possibly due to low numbers of women we saw in technology and engineering, these providers attracted mostly men (88% of all starts within this group of providers and 47% of all male apprenticeship starts in Dorset - Figure 174).

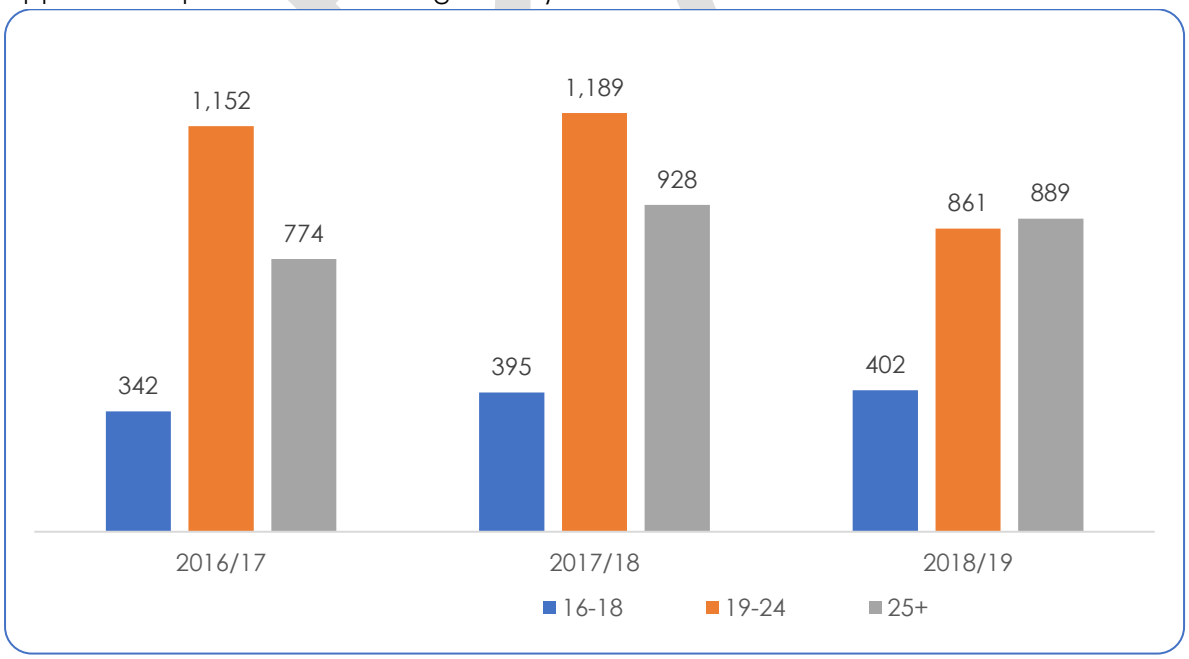


Figure 173. Dorset LEP –Other and HE provider's apprenticeship starts 2016/17 – 2018/19 by age band. Datacube (Learner Delivery)

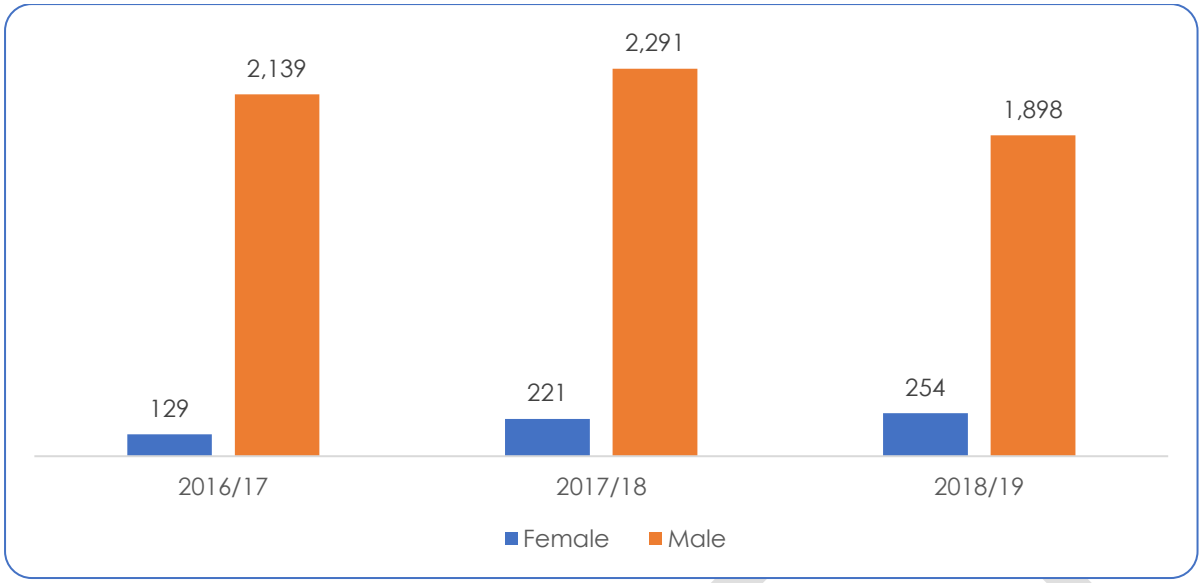


Figure 174. Dorset LEP –Other and HE provider's apprenticeship starts 2016/17 – 2018/19 by gender. Datacube (Learner Delivery)

- **FE Colleges (General and Special) and Sixth Form Colleges**

Over a quarter of apprenticeships starts in Dorset in 2018/19 (27%) has been delivered by FE and sixth form colleges. Mirroring the overall decline in apprenticeship starts, there was a 21% decline in starts amongst these providers over recent years.

Among these, the top three providers are the local FE Colleges (Table 42), which together account for 73% of all apprenticeship starts among these providers and a fifth of all apprenticeship starts in Dorset over 2018/19. While Bournemouth and Poole College has maintained and slightly increased the number of apprenticeship starts over the past few years, Weymouth College has seen a slight decrease (8%) and the starts in Kingston Maurward fell by a quarter. The three colleges have also catered for c250 learners considering themselves as having a learning difficulty or disability (marking a 20% increase in 2018/19 compared to 2016/17). This illustrates the important role of the colleges in providing opportunities for learners with diverse needs.

Table 42. Dorset Colleges apprenticeship starts 2016/17 – 2018/19 (Datacube – Learner Delivery)

	2016/17	2017/18	2018/19
THE BOURNEMOUTH AND POOLE COLLEGE	887	837	892
WEYMOUTH COLLEGE	261	204	240
KINGSTON MAURWARD COLLEGE	219	179	158

In this section we would look more closely at the provision through these three main FE providers in Dorset. This is shown in the following tables, covering participation and achievement statistics for apprenticeships for the period 2016/17 to 2018/19.

- **The Bournemouth and Poole College**

The Bournemouth and Poole College is the biggest provider of apprenticeships of the three colleges with c.890 apprenticeship starts in 2018/19 and is among the few providers improving on the number of apprenticeship starts on 2016/17. There has been a decline in intermediate and a sharp increase in higher apprenticeship starts (Figure 175).

The college has largely maintained the achievements from 2016/17 although intermediate apprenticeships achievements declined on the previous year when they saw a sharp increase (Figure 176). The apprenticeship programme is concentrated in engineering and manufacturing, but also delivers in health and care, business, construction and retail (Figure 177).

In terms of the learners age profile, the largest proportion of apprenticeship enrolments (47% of the 2018/19 starts) were between 16 and 18 year olds (Figure 178). The number of these learners has declined over recent years, while those aged 19 and over have risen.

The apprenticeship programme has predominantly attracted men over recent years (possibly linked to the engineering focus of the curriculum) and the number of women has declined further recently accounting for 29% of all starts (Figure 179). The college also catered for c200 learners considering themselves as having a learning difficulty or disability (marking an increase from 16% of all enrolled in the programme in 2016/17 to 22% in 2018/19).

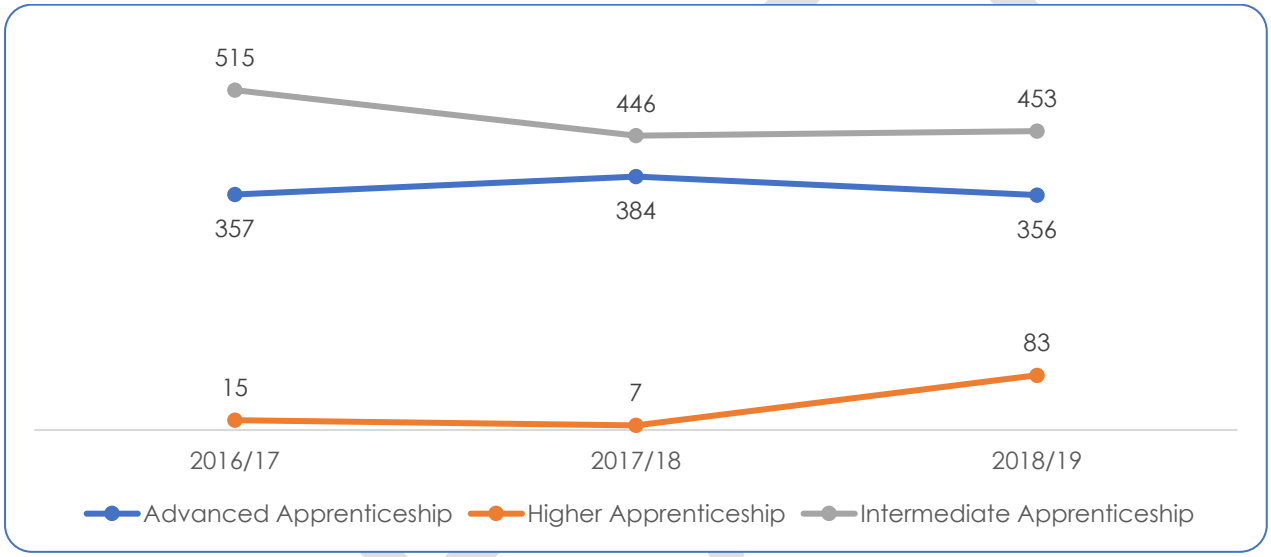


Figure 175. Bournemouth and Poole College apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

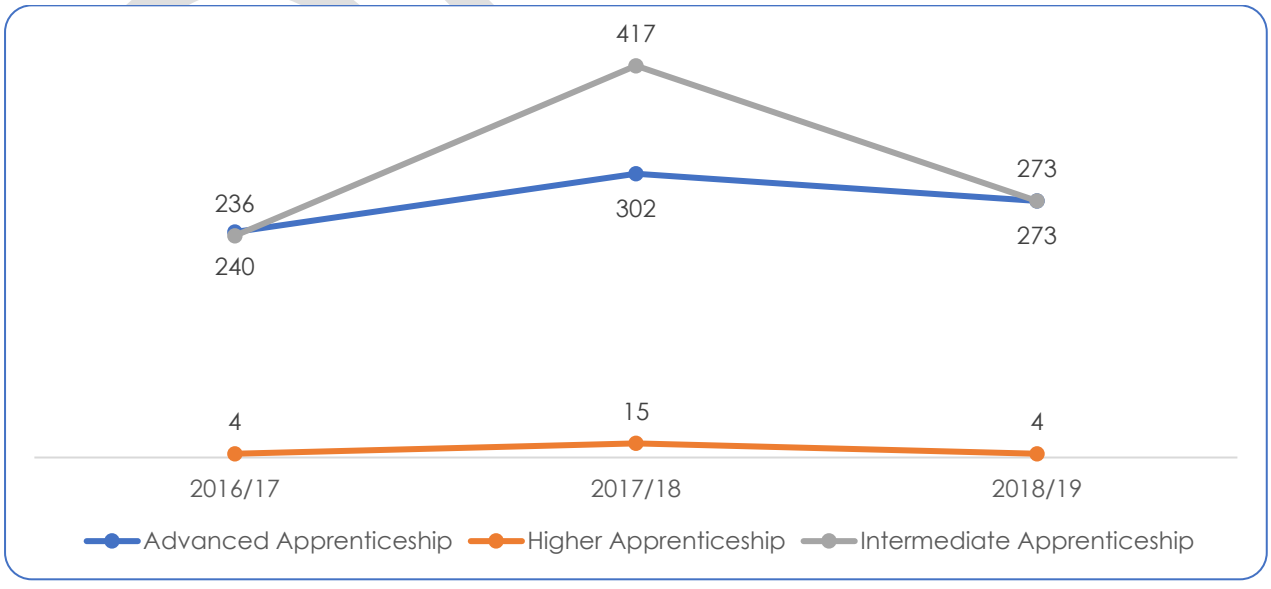


Figure 176. Bournemouth and Poole College apprenticeship achievements 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

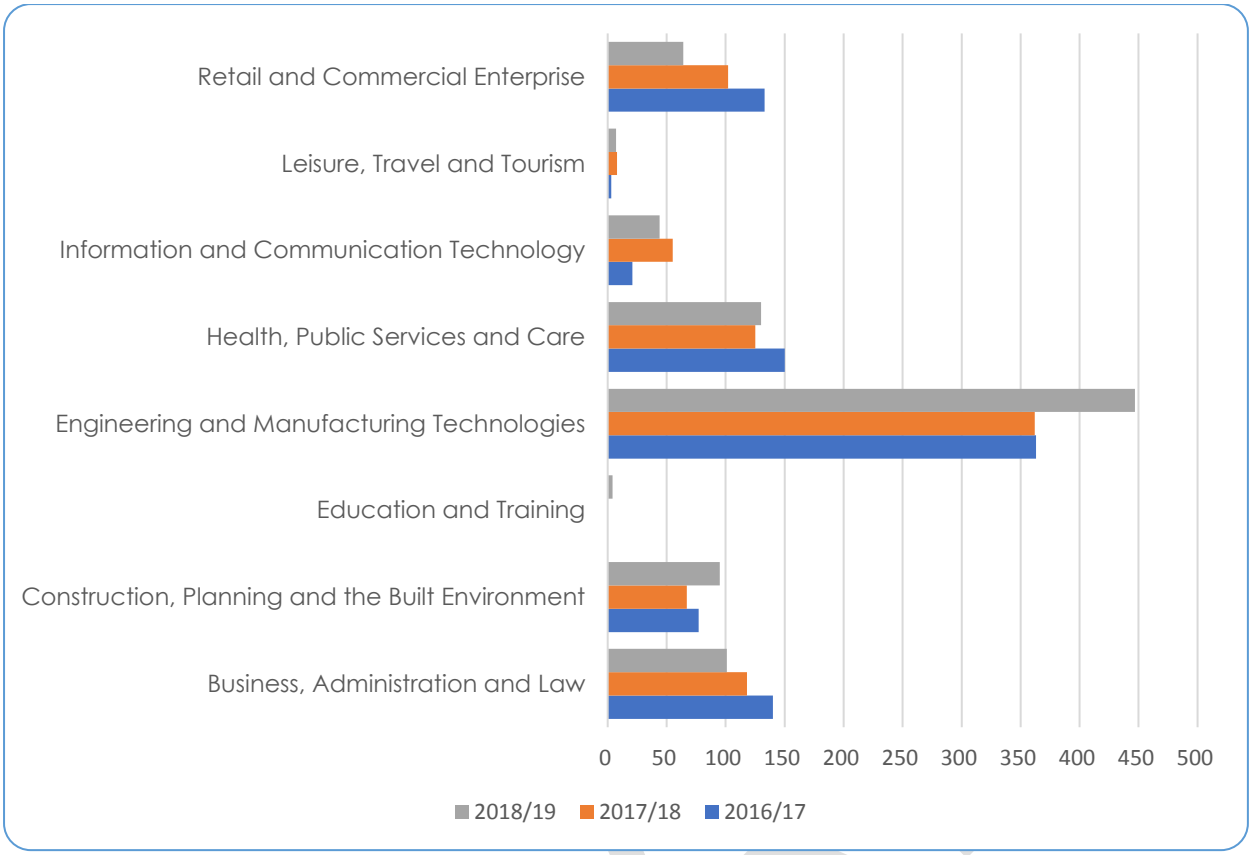


Figure 177. Bournemouth and Poole College apprenticeship starts 2016/17 – 2018/19 by Sector Subject area. Datacube (Learner Delivery)

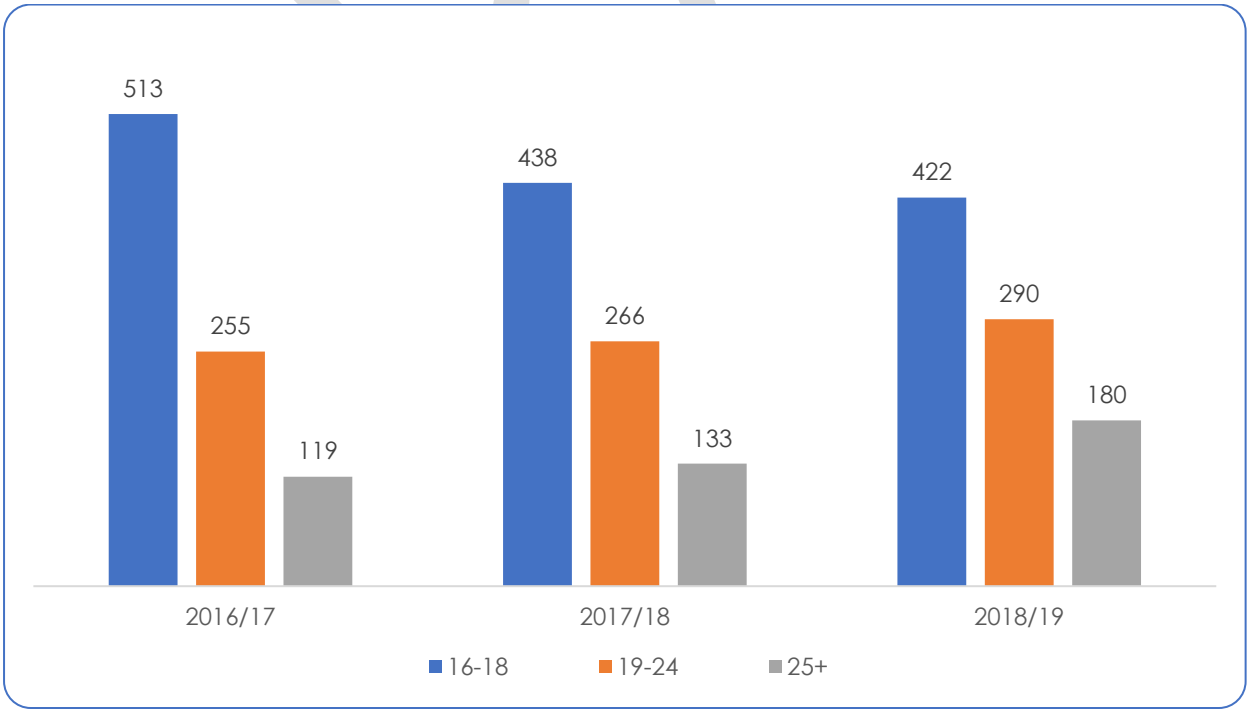


Figure 178. Bournemouth and Poole College apprenticeship starts 2016/17 – 2018/19 by age band. Datacube (Learner Delivery)

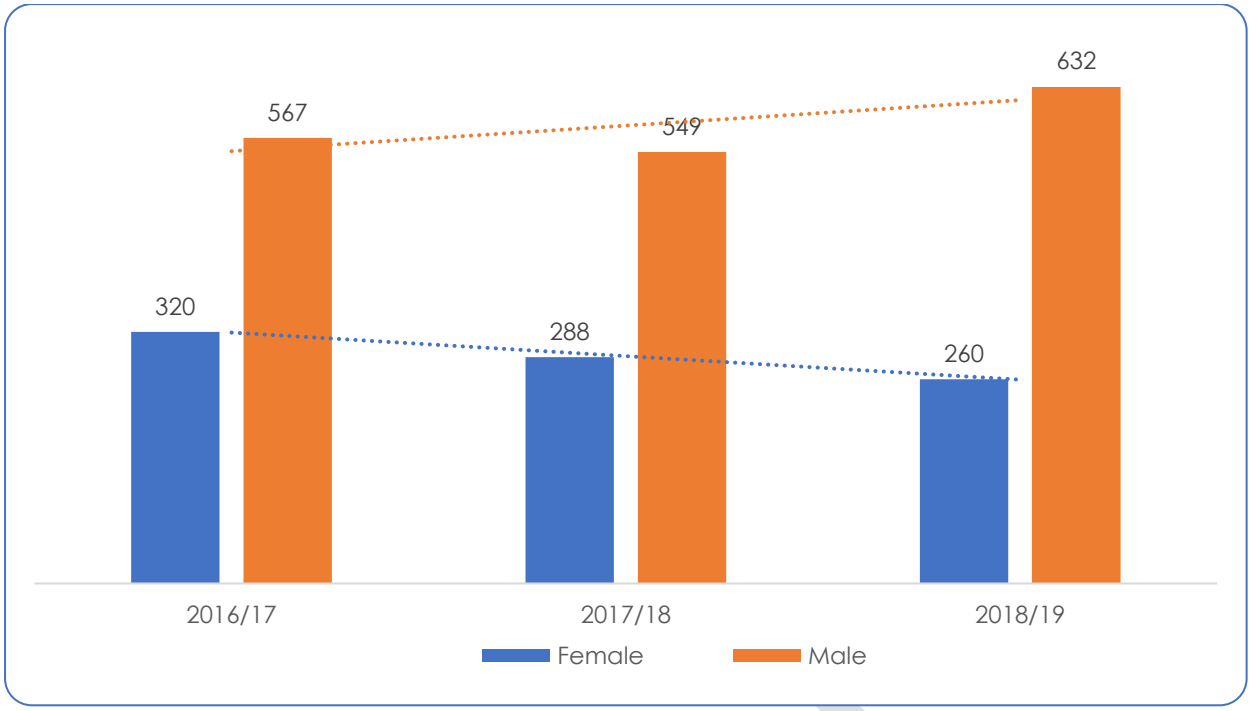


Figure 179. Bournemouth and Poole College apprenticeship starts 2016/17 – 2018/19 by gender. Datacube (Learner Delivery)

- **Weymouth College**

Weymouth College has seen a minor decrease in the number of apprenticeship starts in 2018/19 (n=240) compared to 2016/17 (n=261). This was largey accounted for by the slight fall in advanced and intermediate levels apprenticeships. Figure 180 illustrates that over the past year (2018/19) the college recovered from the marked decline in inermediate apprenticeship starts that occurred in 2017/18.
Regarding achievements there was a noted variability over recent years (Figure 181).

The apprenticeship programme in the college is concentrated in engineering, construction, business and retail (Figure 182).
Similar to BPC, the largest proportion of apprenticeship learners (54% of the 2018/19 starts) are aged 16-18 (Figure 183). Unlike BPC, the number of these learners have increased over recent years, while those aged 25+ fell.

While there were almost equal numbers of men and women on the apprenticeship programme back in 2016/17 (47% women), the number of female enrolments has almost halved since then accounting for 29% of the apprenticeship starts in 2018/19 (Figure 184).
The college also catered for c30 learners considering themselves as having a learning difficulty or disability (marking an increase from only 2% of all enrolled in the programme in 2016/17 to 12% in 2018/19).

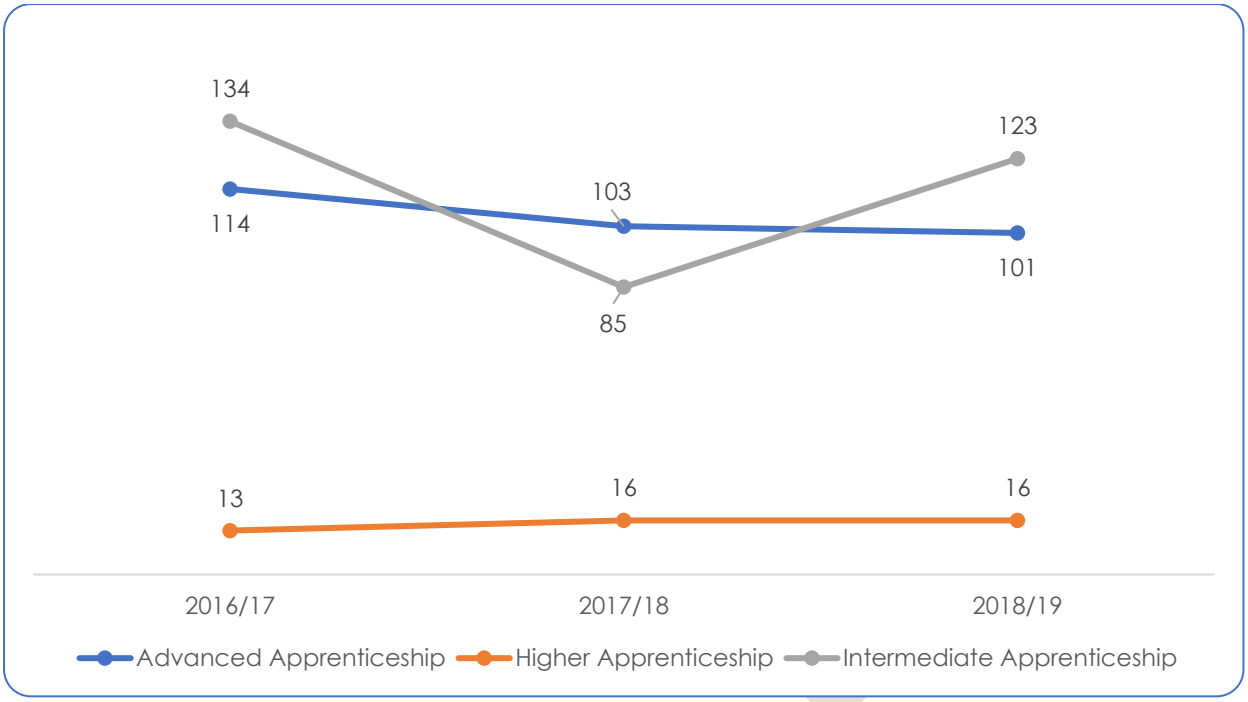


Figure 180. Weymouth College apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

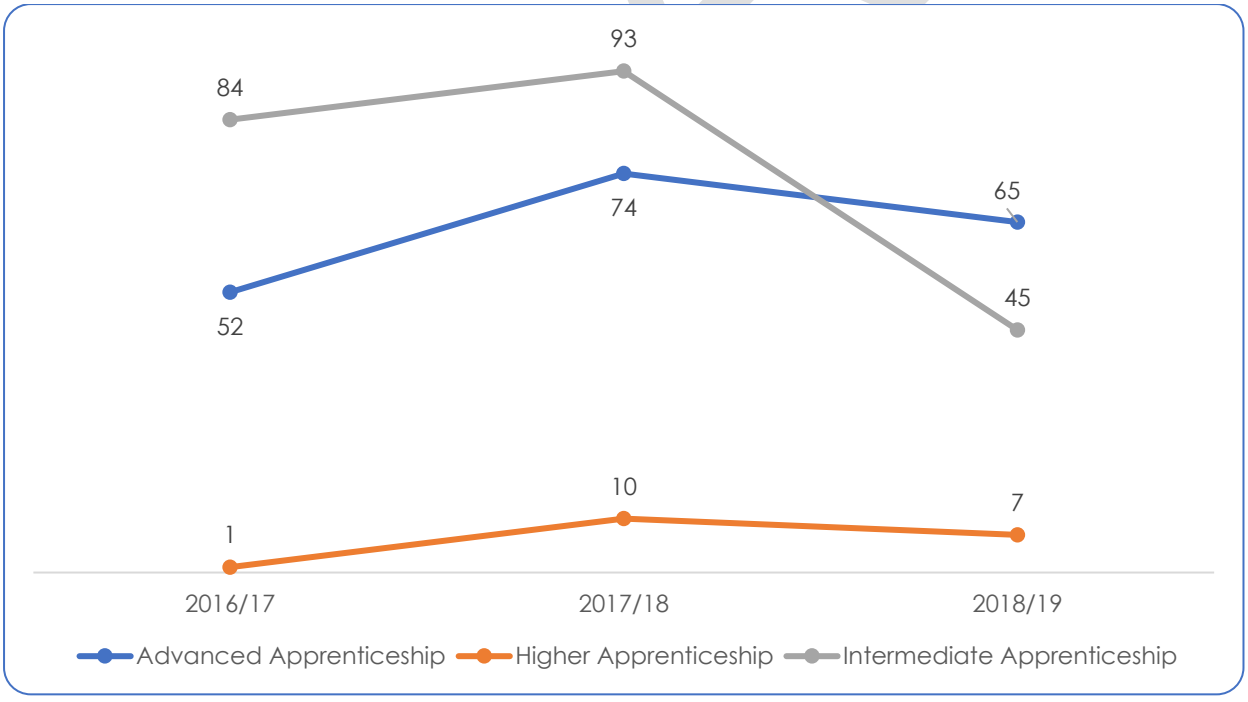


Figure 181. Weymouth College apprenticeship achievements 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

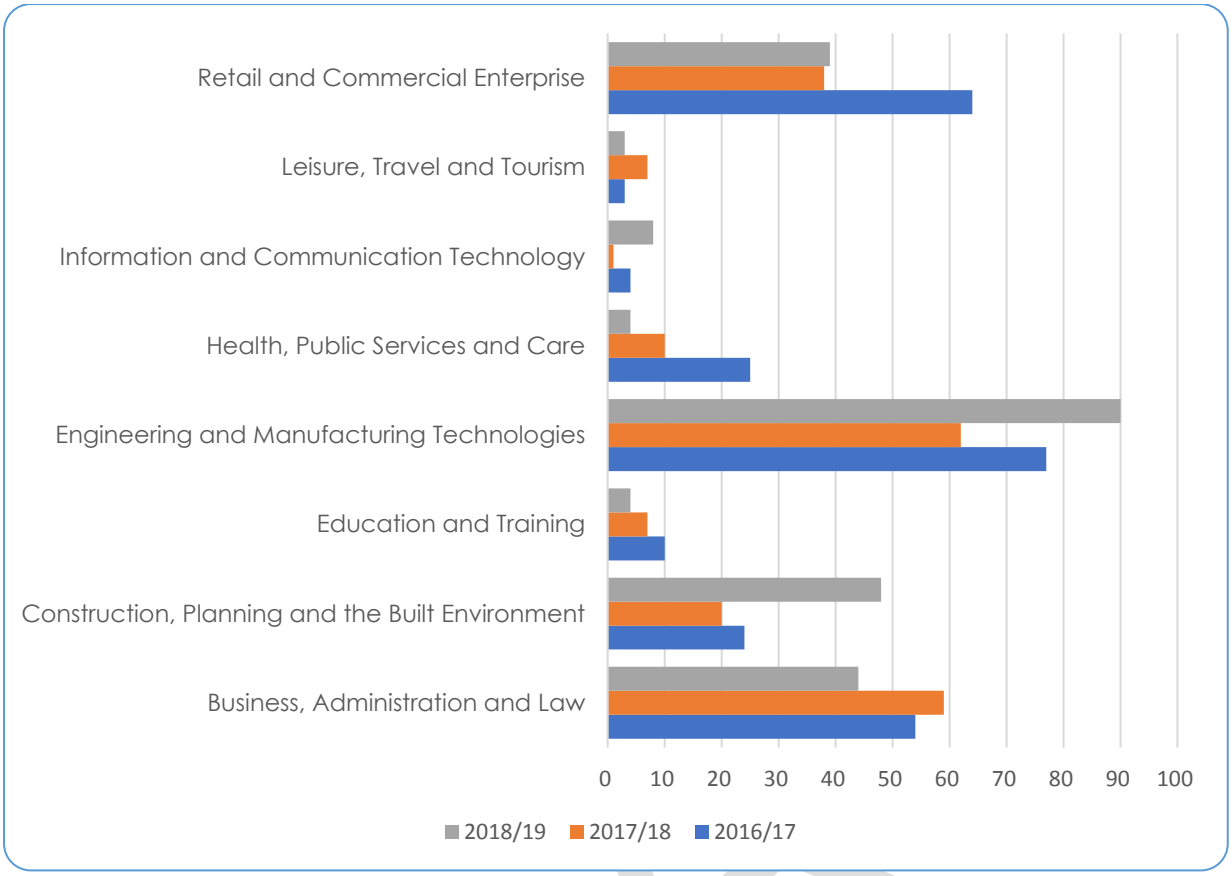


Figure 182. Weymouth College apprenticeship starts 2016/17 – 2018/19 by sector subject area. Datacube (Learner Delivery)

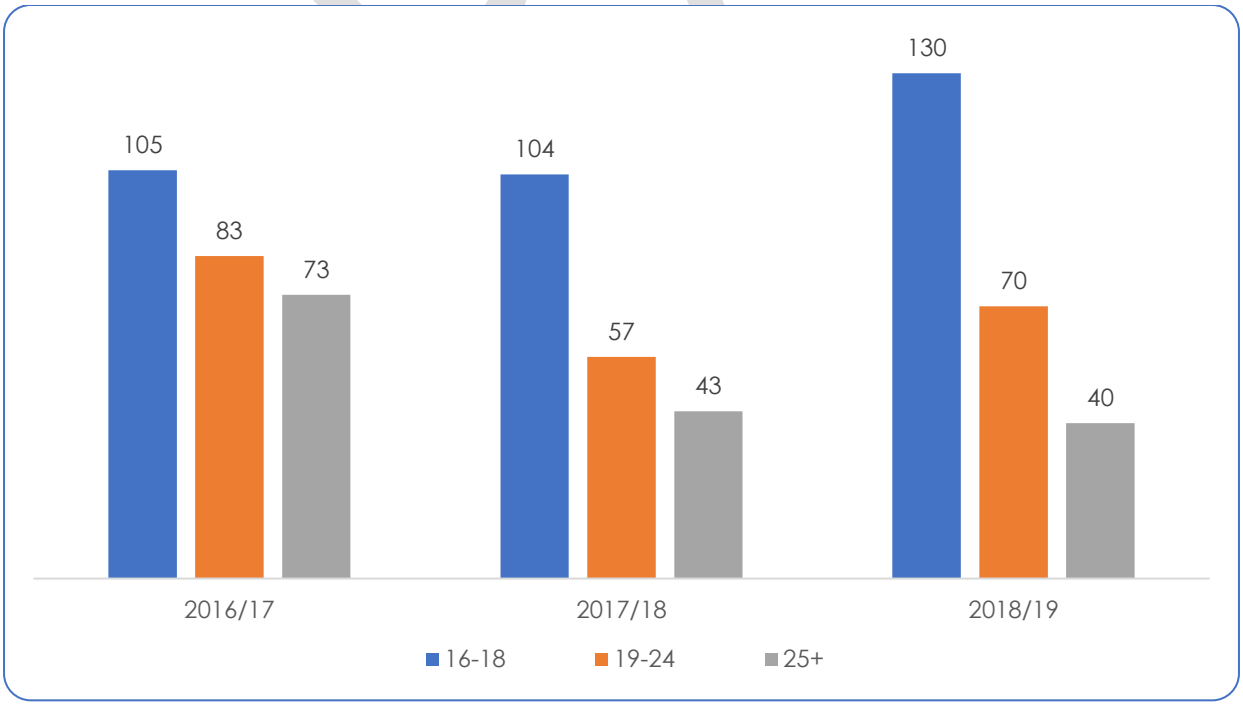


Figure 183. Weymouth College apprenticeship starts 2016/17 – 2018/19 by age band. Datacube (Learner Delivery)

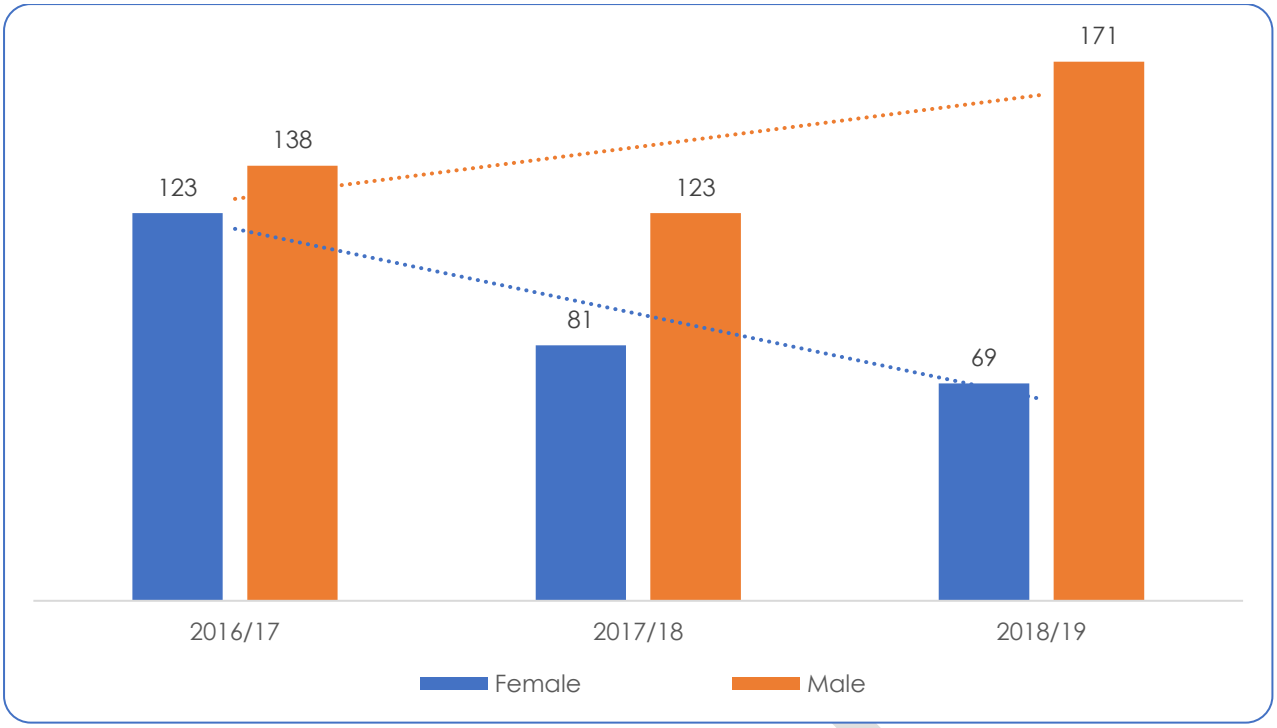


Figure 184. Weymouth College apprenticeship starts 2016/17 – 2018/19 by gender. Datacube (Learner Delivery)

- **Kingston Maurward College**

Kingston Maurward College has seen a 28% decrease in the number of apprenticeship starts in 2018/19 (n=158) compared to 2016/17 (n=219). This was largey accounted for by the decline in advanced and intermediate apprenticeship levels (Figure 185).
Regarding achievements, the college largely maintained the number of achievements and improved in 2018/19 on the previous year (Figure 186).

Reflecting the college's specialist nature, the apprenticeship programme content is dominated by the sector subject areas of agriculture, horticulture and animal care and business, administration and law (Figure 187Figure 182).
Similar to the other two FE colleges, the largest proportion of apprenticeship learners (49% of the 2018/19 starts) were between 16 and 18 year olds, and the age group that saw decline in the number of apprenticeship starts over recent years were amongst those aged 19 – 24 (Figure 188).

Amongst the three FE colleges, Kingston Maurward was the only one where the number of women exceeded those of men on the apprenticeship programme back in 2016/17 (53%), and they were at almost equal proportions in 2018/19 (Figure 189).
The college also catered for c30 learners considering themselves as having a learning difficulty or disability (marking a slight decline from 21% of all enrolled in the programme in 2016/17 to 18% in 2018/19).

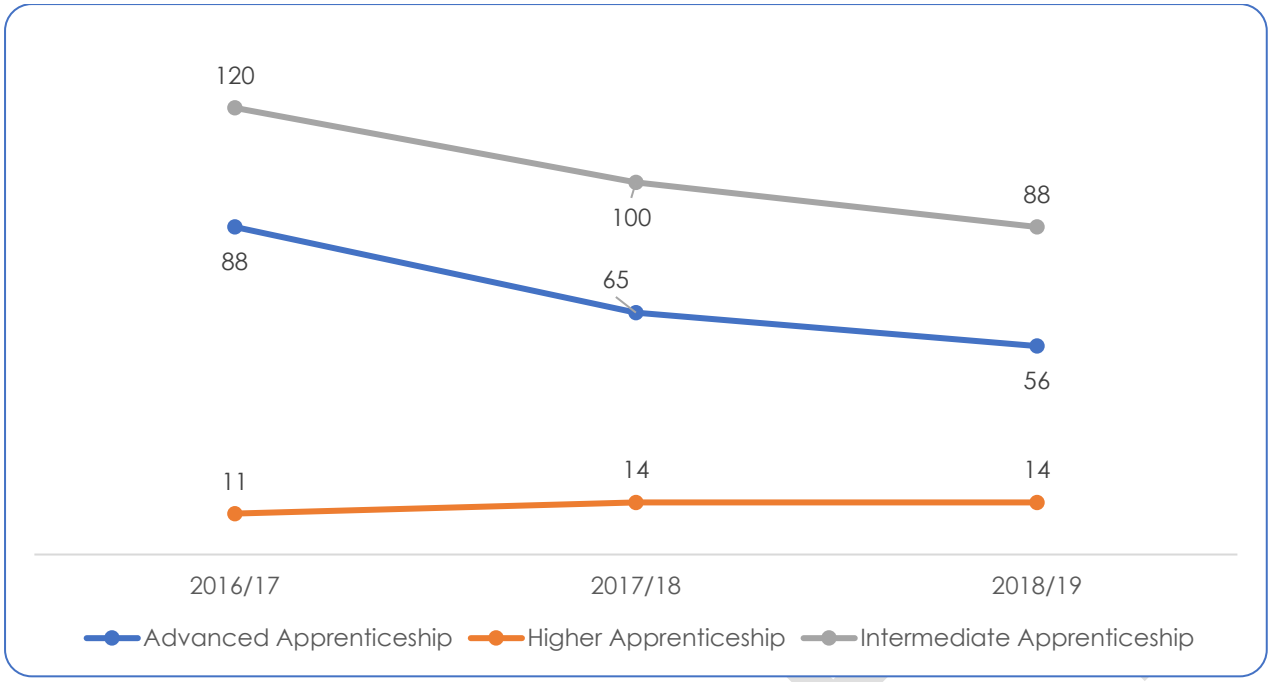


Figure 185. Kingston Maurward College apprenticeship starts 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

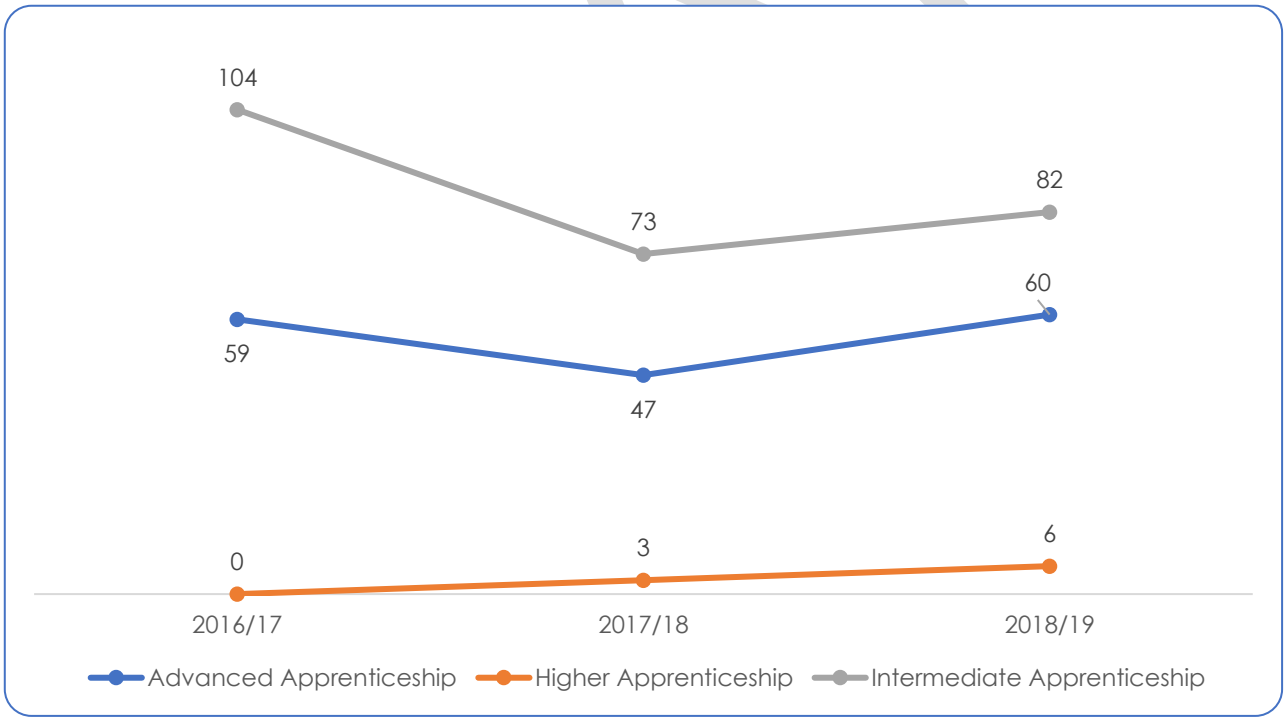


Figure 186. Kingston Maurward College apprenticeship achievements 2016/17 – 2018/19 by Apprenticeship level. Datacube (Learner Delivery)

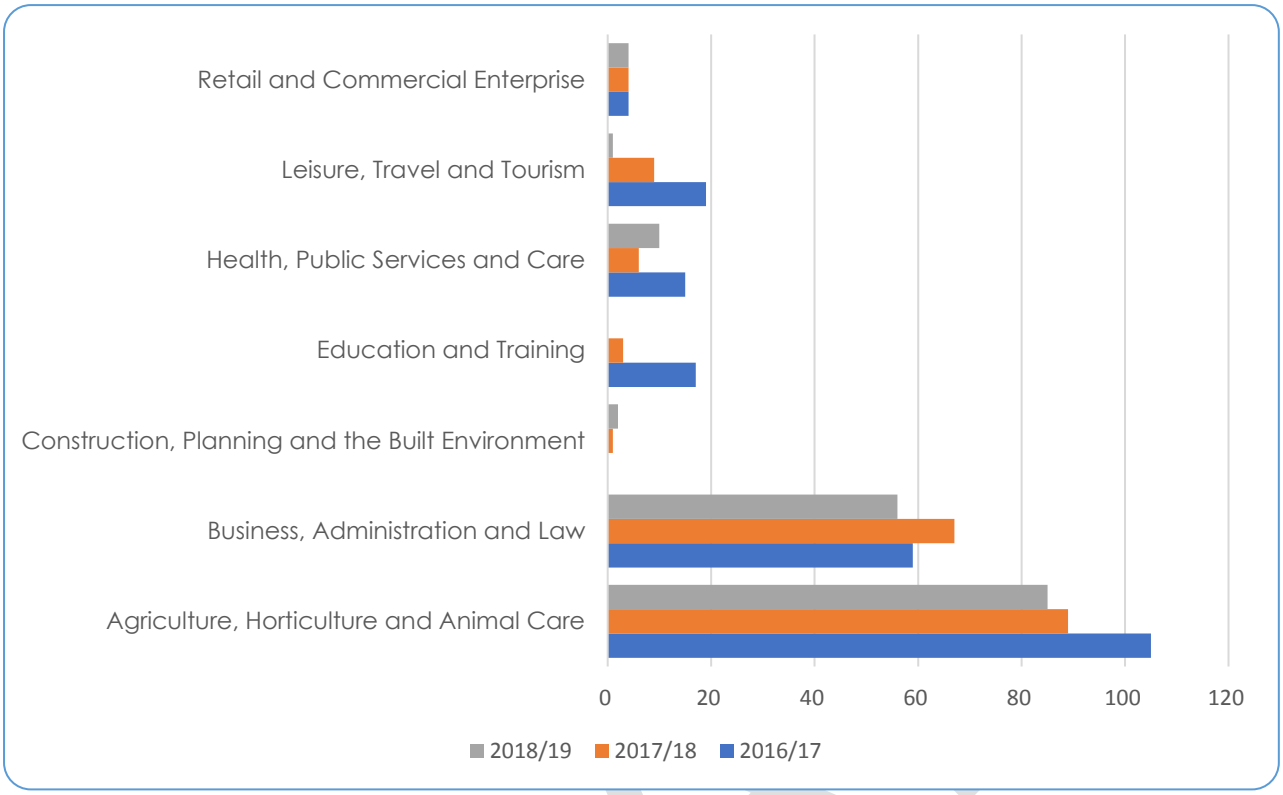


Figure 187. Kingston Maurward College apprenticeship starts 2016/17 – 2018/19 by Sector Subject. Datacube (Learner Delivery)

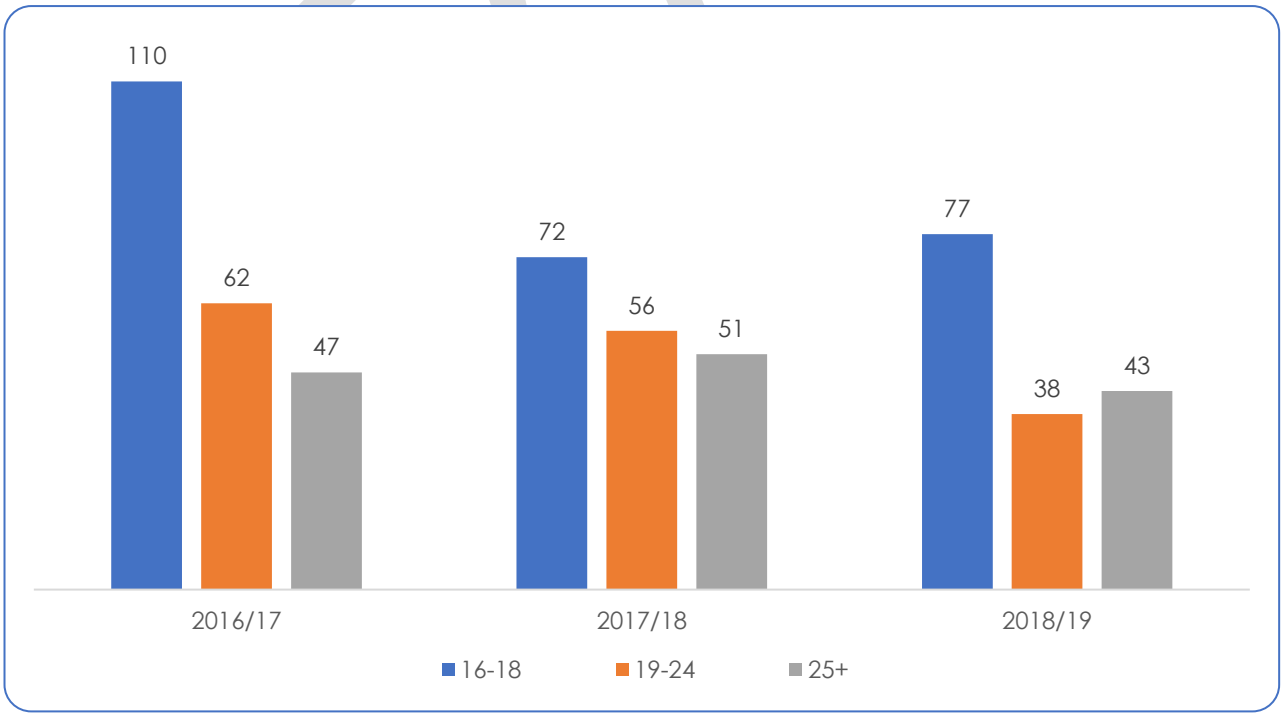


Figure 188. Kingston Maurward College apprenticeship starts 2016/17 – 2018/19 by Age band. Datacube (Learner Delivery)

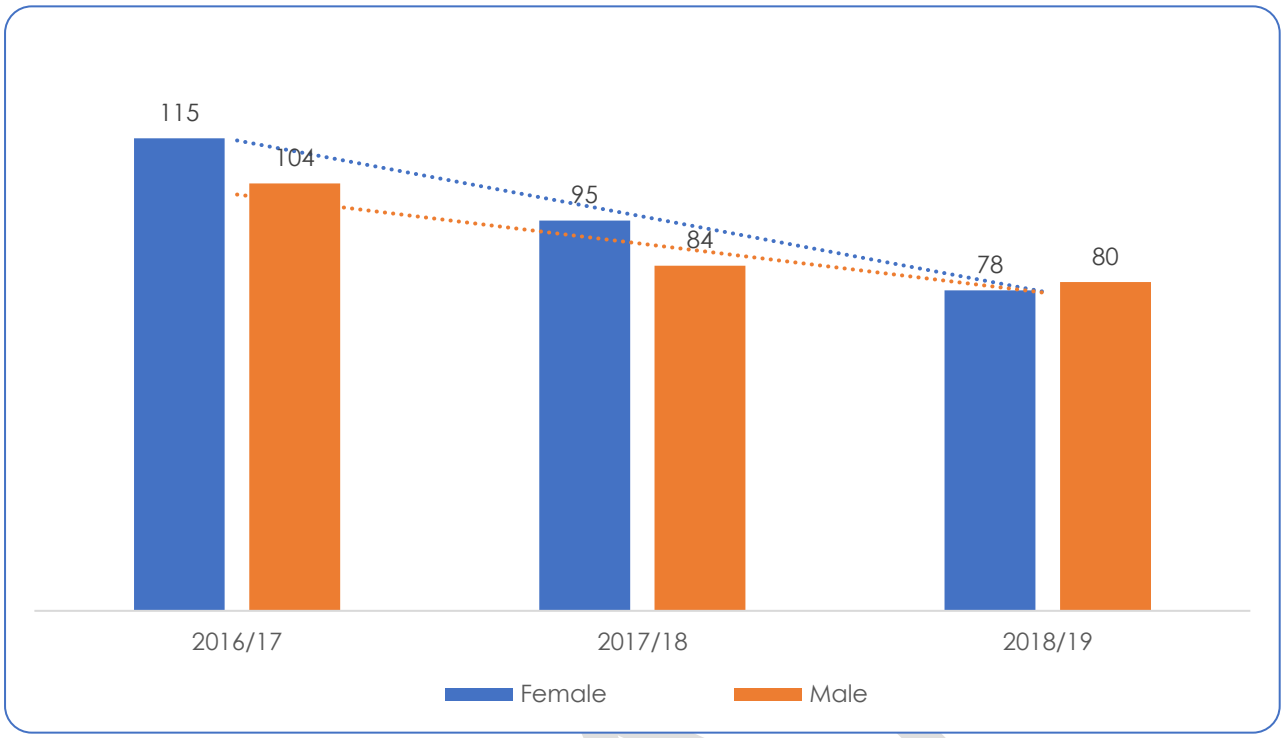


Figure 189. Kingston Maurward College apprenticeship starts 2016/17 – 2018/19 by Gender. Datacube (Learner Delivery)

Further Education Providers

Provision of FE and Skills Funded learning opportunties in Dorset are dominated by FE Colleges, adult education provision and provate providers.
The number of learning starts and achievements by type of provider are set out below, illustrating that almost half of the learning starts and over half of the achievements were delivered by FE Colleges including tertiary education throughout 2018-19. Note the figures presented here will differ from those directly provided by the Colleges and discussed later in this report.

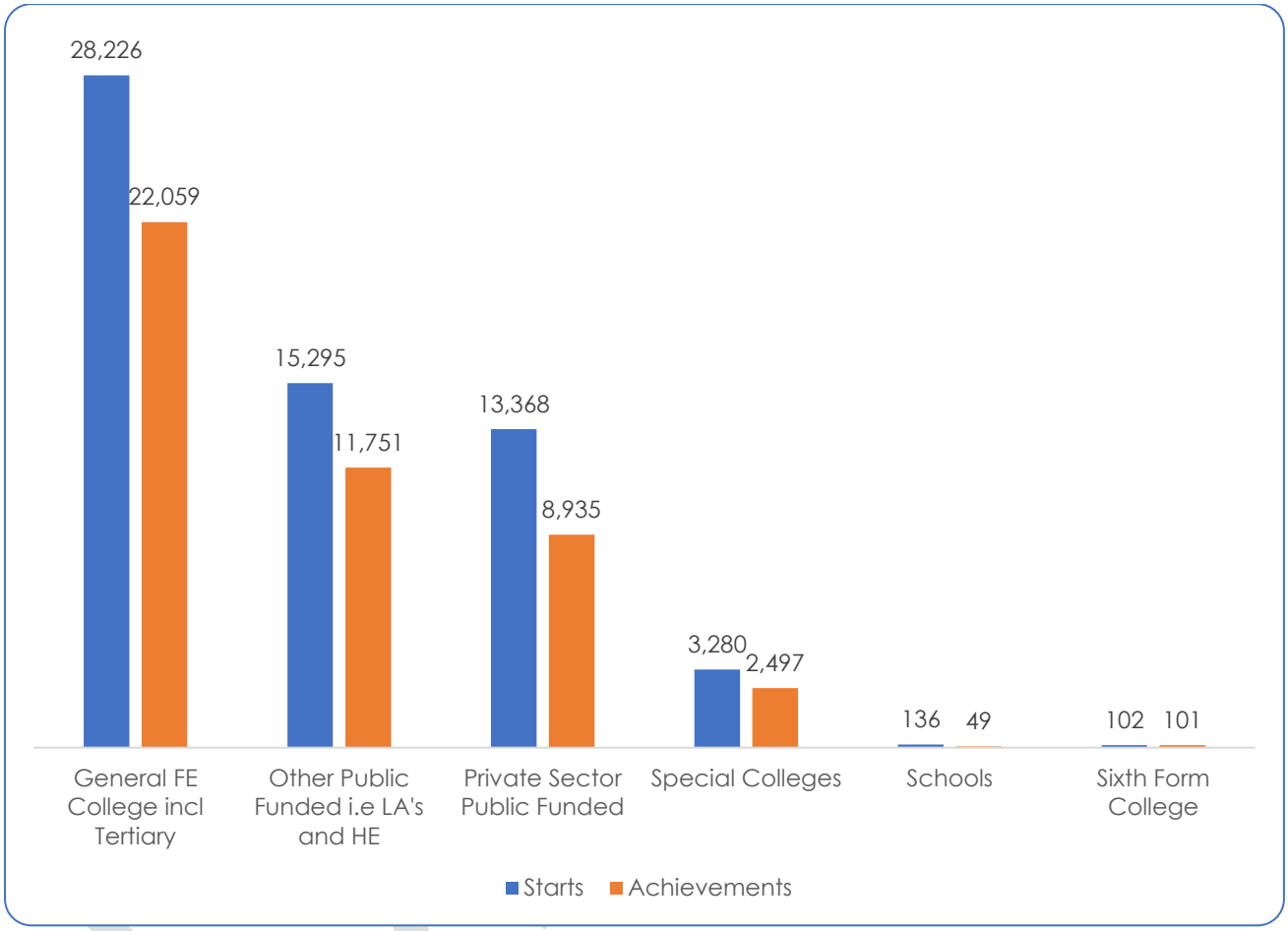


Figure 190. 2018-19 Dorset learning starts and achievements by type of provider. DfE Datacube delivery data

The next figure outlines the top educational providers in terms of the number of learning starts throughout 2018-19. This illustrates that FE colleges deliver the higher proportion of 16-18 education, while LA's adult education and private sector public funded providers offer higher proportions of adult learning.

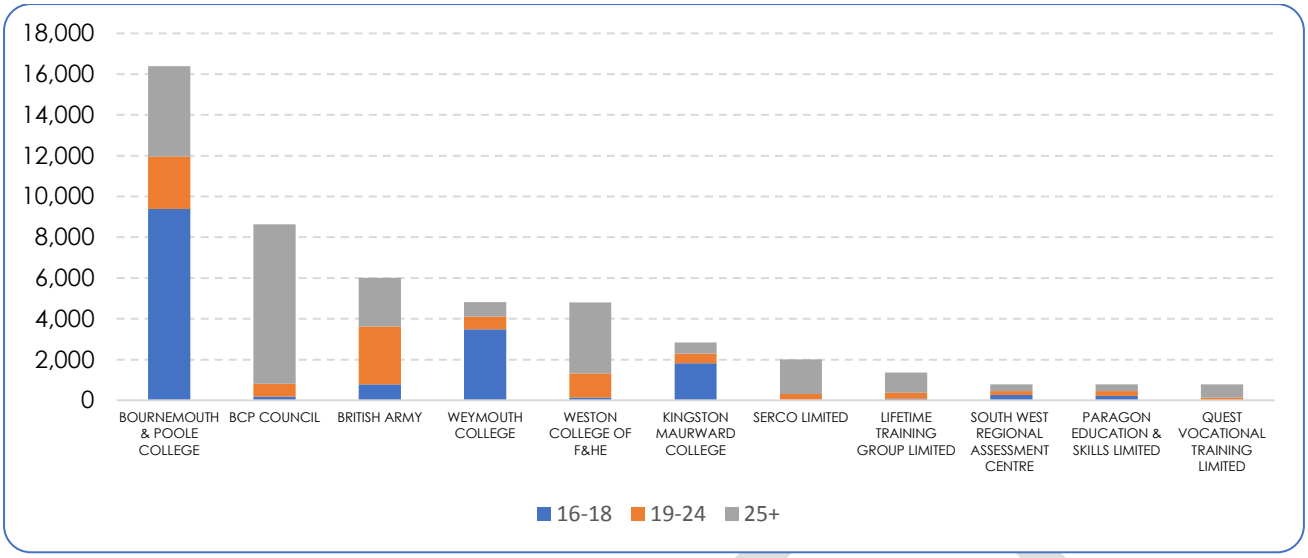


Figure 191. Top providers 2018/19 by age bands learning starts. DfE Datacube delivery data

In terms of overall funding allocations for post-16 education provision, the below table sets out the numbers of post-16 learners allocated by the Education and Skills Agency to Dorset LEP providers. This includes all of the sixth-form colleges alongside the FE Colleges. It does not include private providers. The table illustrates that approximately 40% of post-16 ESFA – funded education and almost half of disadvatage related funds are allocated to be delivered by the three main FE Colleges (Bournemouth and Poole, Weymouth and Kingston Maurward). This highlights the important role of that 'sector', with some schools/ colleges considerable in size.

Table 43. 16 to [19 allocations (ESFA) for 2018/19 academic year]

Institution Name	Category	Total Students	High Needs Students (included in Total Students)
Bournemouth, Christchurch & Poole			
The Bournemouth and Poole College	General FE and Tertiary	**3,017**	**50**
Parkstone Grammar School	Academy	**327**	**0**
Poole High School	School Sixth Form	**314**	**0**
St Peter's Catholic Comprehensive School	Academy	**311**	**6**
Poole Grammar School	Academy	**295**	**1**
Bournemouth School for Girls	Academy	**287**	**0**
Bournemouth School	Academy	**281**	**1**
Corfe Hills School	Academy	**280**	**2**
The Arts University Bournemouth	Higher Education Provider	**259**	**0**
Leaf Studio	Studio School	**248**	**3**
Avonbourne College	Academy	**183**	**0**
St Edward's Catholic/CofE School, Poole	School Sixth Form	**173**	**0**
The Bishop of Winchester Academy	Academy	**115**	**1**
The Bourne Academy	Academy	**102**	**0**
Poole Borough Council	Local Authority	**70**	**0**

Table continued

Institution Name	Category	Total Students	High Needs Students (included in Total Students)
Magna Academy	Academy	**66**	**5**
Cambian Wing College	Special Post-16 Institution	**46**	**46**
Aspire Training Team Ltd	Independent Learning Provider	**27**	**0**
Oak Academy	Academy	**27**	**4**
Victoria Education Centre & Sports College	Non-Maintained Special School	**21**	**21**
Montacute School	Academy Special	**18**	**18**
SOUTH WEST REGIONAL ASSESSMENT CENTRE	Special Post-16 Institution	**17**	**17**
Langside School	Non-Maintained Special School	**3**	**3**
	Total	**6,487**	**178**
Dorset			
Weymouth College	General FE and Tertiary	**1,302**	**58**
Kingston Maurward College	Agricultural & Horticultural College	**652**	**107**
The Thomas Hardye School	Academy	**754**	**4**
Twynham School	Academy	**449**	**0**
Queen Elizabeth's School	Academy	**391**	**0**
Budmouth College	School Sixth Form	**370**	**0**
The Gryphon School	Academy	**370**	**0**
Gillingham School	School Sixth Form	**352**	**0**
Lytchett Minster School	School Sixth Form	**273**	**0**
Ferndown Upper School	School Sixth Form	**237**	**0**
Highcliffe School	Academy	**229**	**0**
The Woodroffe School	School Sixth Form	**191**	**0**
Shaftesbury School	Academy	**188**	**0**
The Purbeck School	School Sixth Form	**145**	**0**
The Blandford School	School Sixth Form	**143**	**0**
The Sir John Colfox Academy	Academy	**127**	**0**
Sturminster Newton High School	School Sixth Form	**100**	**0**
Beaminster School	School Sixth Form	**88**	**0**
Sheiling Special Education Trust	Special Post-16 Institution	**40**	**40**
The Grange School	Academy	**31**	**0**
The Fortune Centre of Riding Therapy	Special Post-16 Institution	**30**	**30**
DORSET STUDIO SCHOOL	Studio School	**27**	**0**
Aurora FE Ltd	Special Post-16 Institution	**20**	**20**
Wyvern Academy	Academy Special	**19**	**19**
Portfield School	Non-Maintained Special School	**9**	**9**
	Total	**6,537**	**287**

Overall, the biggest proportion of Skills Funding Agency (SFA) or Education Funding Agency (EFA) training delivered in Dorset is at Level 2 or below. The below table shows achievements in the area (covering the last three full academic years (16/17, 17/18, 18/19) at various levels.

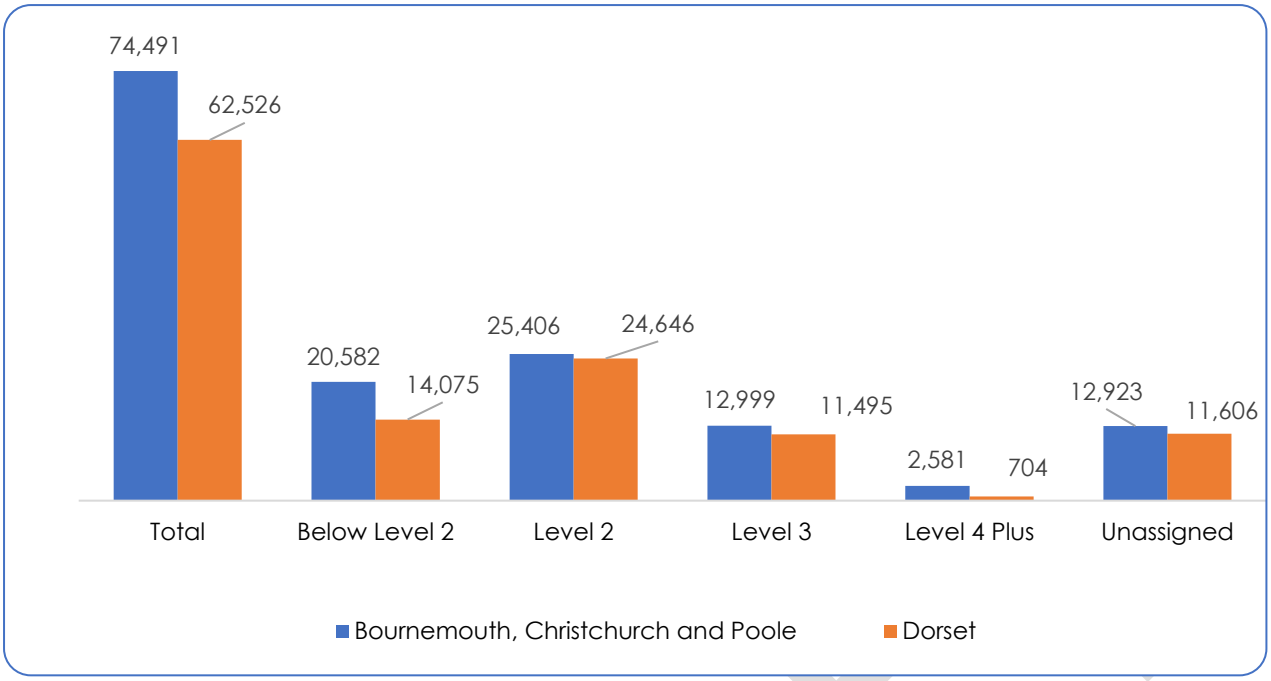


Figure 192. Number of achievements by level of study and Local Authority. Datacube delivery data – DfE

Information by Providers

The following section provides more detailed information on the primary skills providers within the DLEP area. This encapsulates:

- the two largest Universities (Bournemouth University and Arts University Bournemouth)
- the university college (AECC)
- the three Further Education Colleges (Bournemouth and Poole College, Weymouth College and Kingston Maurward)
- adult community education activities provided through BCP Council across the DLEP

It is important to note that the information shown is certainly not consistent across providers, as the providers themselves have sourced the majority of data. Therefore comparisons between them are not necessarily drawn. However, it does give some useful insights into the type of activity that is delivered across the institutions from a supply-side perspective, including curriculum offer in the area, and the scale of learning opportunities - encapsulating FE, HE and adult education.

Higher Education (HE)

The Teaching Excellence Framework (TEF) draws on nationally collected data to measure the performance of higher education providers in three primary areas:

- Student satisfaction – how satisfied students are with their course, as measured by responses to the National Student Survey (NSS)
- Continuation – the proportion of students that continue their studies from year to year, measured by data collected by the Higher Education Statistics Agency (HESA)
- Employment outcomes – what students do after they graduate, as measured by responses to the Destination of Leavers from Higher Education survey (DLHE)

Considering the mix of students and subjects at each provider, the metrics show how they are performing against a set of benchmarks known as a provider's expected performance. If a provider's actual performance is significantly above its benchmark, this is taken as a measure of high performance.

The most recent award status for each HE provider (including the FE Colleges who provide HE courses[79]) is shown in the below table.

Table 44. TEF outcomes – Office for Students

Provider	Review comments
AECC University College Year of Award **June 2017** TEF rating **Silver**	• students are engaged with developments from the forefront of professional practice through, for instance, exposure to professional practice in clinical training facilities, an outpatients' clinic, local hospital and GP practice observation • an effective strategic focus on vocational and professional education which indicates that all students acquire knowledge, skills and understanding that are most highly valued by employers • a well-developed institutional culture that facilitates, recognises and rewards excellent teaching that is evidenced in good uptake of HEA Fellowship and institutional support for scholarship, including support for registration with the relevant PSRB • outstanding learning resources, especially the onsite diagnostic imaging facilities. Learning opportunities are also excellent with placements of good diversity, including the outpatient clinic at the provider, attending observation rounds in local hospital and in a GP practice
Bournemouth and Poole College Year of Award **June 2019** TEF rating **Bronze**	• significant investment in resources, with levels of student engagement monitored by teaching staff • courses that are designed in collaboration with employers, containing modules related to external activity and industry practice • extensive support mechanisms for students • employability and the development of transferable skills that are central to the provider's strategy

[79] Therefore, this should be viewed as a review of their HE provision solely

Arts University Bournemouth Year of Award **June 2017** TEF rating **Gold**	• high quality teaching which provides stimulation and challenge with small classes and high levels of tutor contact • students' independence that is developed through the negotiation of assessments, project work and live briefs • course design, delivery and assessment that is informed and enriched by research and is practice-led, which engages professionals in delivery so that students develop the relevant skills to succeed in employment • physical and digital resources, which are actively and consistently used by students to enhance learning and progression, and are of the highest quality to provide a professional work environment for students • an embedded institutional culture that facilitates, recognises and rewards excellent teaching, which is a particular strength. • very high placement levels with all students offered placements and there is a very high proportion of uptake
Bournemouth University Year of Award **June 2017** TEF rating **Silver**	• systematic and well-embedded staff development mechanisms, with most staff holding a teaching qualification • strong support for Peer Assisted Learning within the institution and very good uptake levels • effective student engagement that is supported by a number of initiatives such as the development of a well-received Student Research Assistant programme • good levels of investment in, and student use of, learning resources, including the development of the Student Project Bank • very high levels of professional accreditation

In terms of employment outcomes, this is estimated through HESA's DLHE survey (16/17 graduate cohort) and produced as a series of Performance Indicators – as shown in the below table. The confirms (see below comment) about the high levels of employability of AUB students in particular. The FE colleges destinations are shown in **Table 34** with latest figures on students in employment or further study between 72 and 76 per cents.

Table 45. HESA's DLHE survey (16/17 graduate cohort)

Institution	Indicator (% employed or	Benchmark (%)
Arts University Bournemouth	96.2	94.5
Bournemouth University	93.1	94.8
England	94.2	

Bournemouth University

Bournemouth University is the largest higher education provider in Dorset with c.18,000 students enrolled across a wide range of subjects (Figure 193) and levels of study throughout 2018-19 academic year[80]. There are full-time study opportunities for c4,200 undergraduate students and c1,100 postgraduate students – around 5,400 new full-time and c. 1,700 part-time study entrants per annum. Around 45% of the enroled students in 2018-19 were 20 years of age or younger and 16% were 30 years of age or older. Among the enroled students, 2,850 (16%) were with known disability declared, 2,660 (17% of UK home students) were from ethnic background different from white and 2,200 (13%) were coming from outside of the UK.

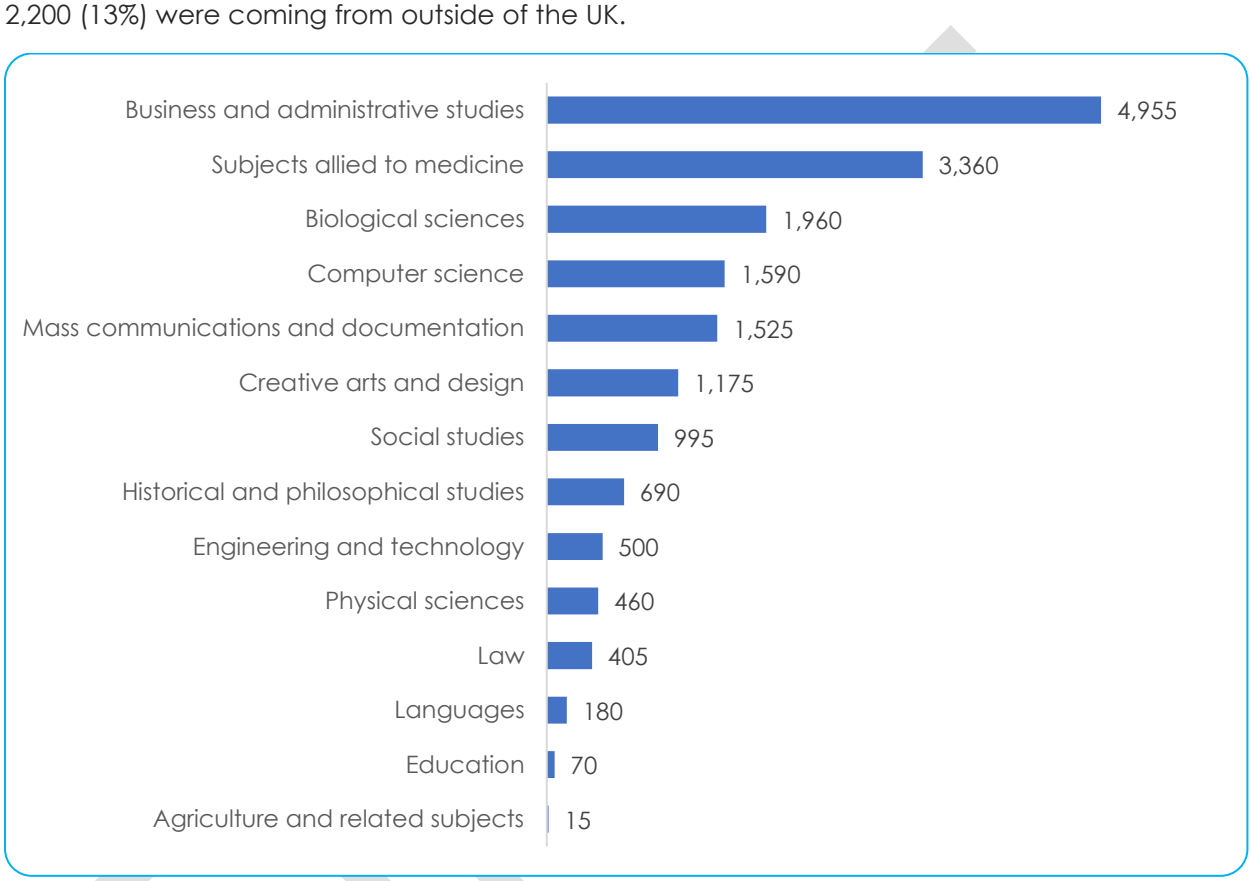


Figure 193. Bournemouth University student enrolments by subject of study 2018-19. **HESA**

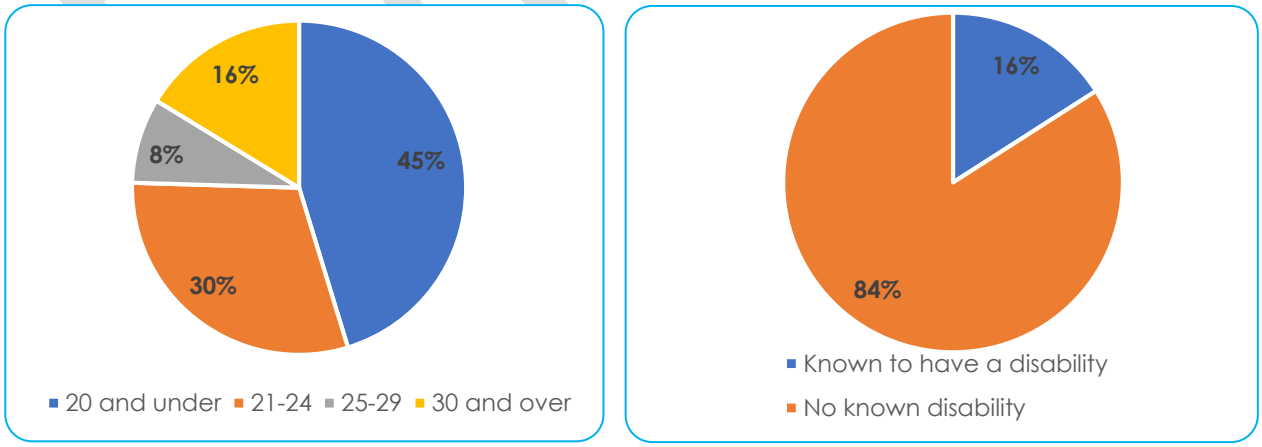


Figure 194. BU student enrolments by age group and known disability 2018-19. HESA

[80] HESA- Higher Education Student Statistics: UK, 2018/19

There is significant demand for places at Bournemouth University, as demonstrated by the number of applications it receives against the number of places it is offering. Over 2018-19 c.24,000 applications were received and 5,400 students were enrolled. For some of its broad undergraduate course subjects (such as subjects allied to medicine and historical and philosophical studies) it receives over 6 applications per enrolled student.

The below table shows that there is significant demand for postgraduate places in engineering & technology and social studies. At an organisational level the number of applications per enrolled student has been in the range of 4.5-5.2 over the past 3 years, for both undergraduate and postgraduate study as is shown in the below tables.

Table 46. Undergraduate applications and enrolled students for FT undergraduate courses – Bournemouth University (2018/19)

	Applications	Offers	Enrolled	Ratio - applications per enrolled FT place
Biological sciences	**2,947**	2,477	695	4.2
Business & administrative studies	**4,010**	3,774	1,046	3.8
Computer science	**1,807**	1,632	481	3.8
Creative arts & design	**1,417**	963	318	4.5
Engineering & technology	**525**	431	117	4.5
Historical & philosophical studies	**331**	321	49	6.8
Languages	**201**	191	52	3.9
Law	**666**	631	143	4.7
Mass communications & documentation	**1,369**	1,054	359	3.8
Physical sciences	**634**	565	142	4.5
Social studies	**1,444**	1,174	261	5.5
Subjects allied to medicine	**3,702**	1,327	592	6.3

Table 47. Postgraduate applications and enrolled students for FT undergraduate courses – Bournemouth University (2018/19)

	Applications	Offers	Enrolled	Ratio - applications per enrolled FT place
Agriculture & related subjects	**44**	41	11	4.0
Biological sciences	**481**	399	155	3.1
Business & administrative studies	**1,975**	1,684	390	5.1
Computer science	**527**	379	104	5.1
Creative arts & design	**106**	63	33	3.2
Engineering & technology	**215**	140	21	10.2
Law	**435**	373	88	4.9
Mass communications & documentation	**515**	374	140	3.7
Physical sciences	**68**	60	29	2.3
Social studies	**432**	319	47	9.2
Subjects allied to medicine	**260**	164	84	3.1

There were c5,600 qualifications awarded by the university in 2018/19, c.4,200 at undergraduate and c.1,400 at postgraduate level, with the biggest proportions being in business studies and subjects allied to medicine.

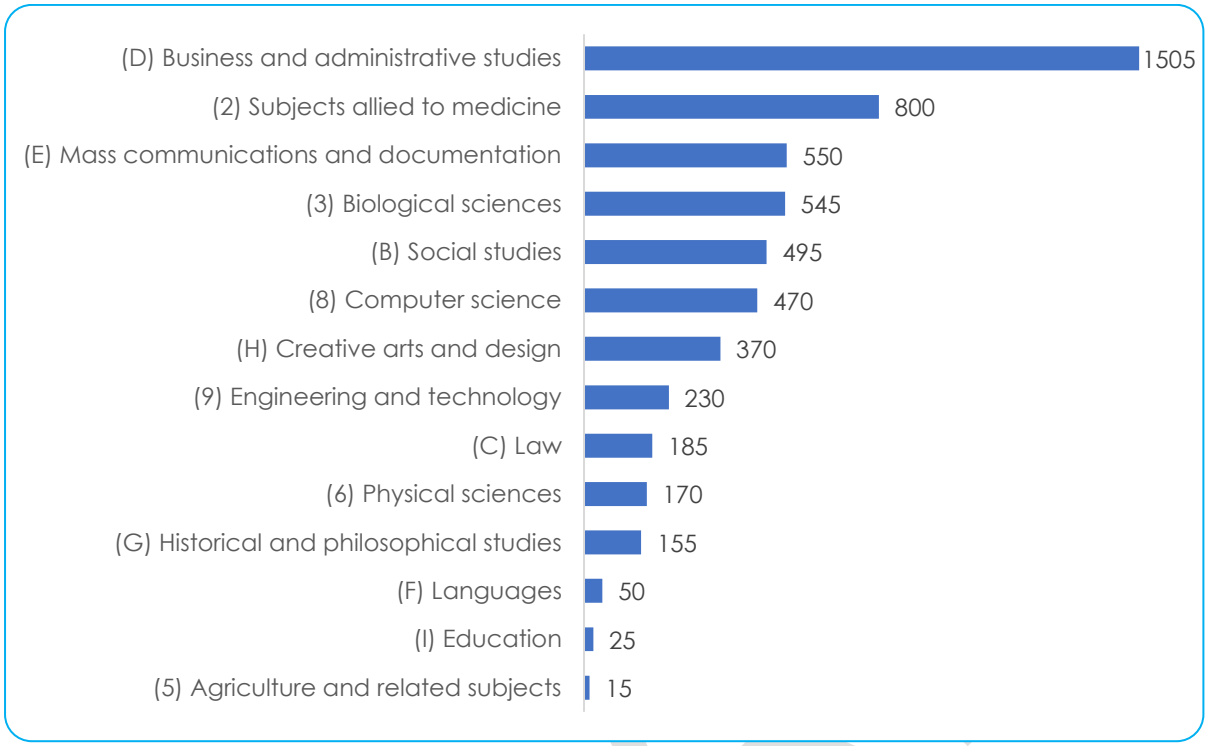


Figure 195. Bournemouth University qualifications by subject area 2018-19. HESA

Data from the University provides more detail around what proportion of the study opportunities it offers are taken up by students from the local area. Figure 196 shows that typically around 20% of undergraduate and postgraduate new entrants come from Dorset (taken as the DLEP area) – equating to c900 individuals each year. Clearly, Bournemouth University therefore acts as an important provider of HE opportunities for a good proportion of individuals who wish to remain and study in the area.

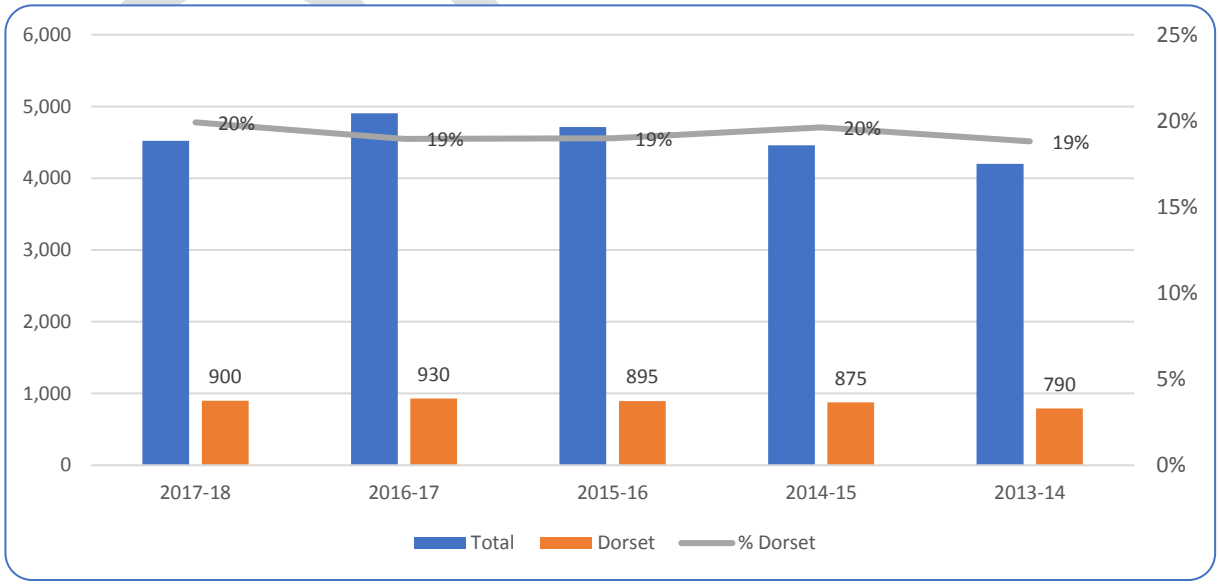


Figure 196. FT home undergraduate & postgraduate intake from the local area – Bournemouth University.
Bournemouth University - HESA data

The courses where local students are most prevalent are shown in Figure 161. For example, 12% (110 students out of 900) of all those students that originate from Dorset and choose to study at Bournemouth University are found on adult nursing courses.

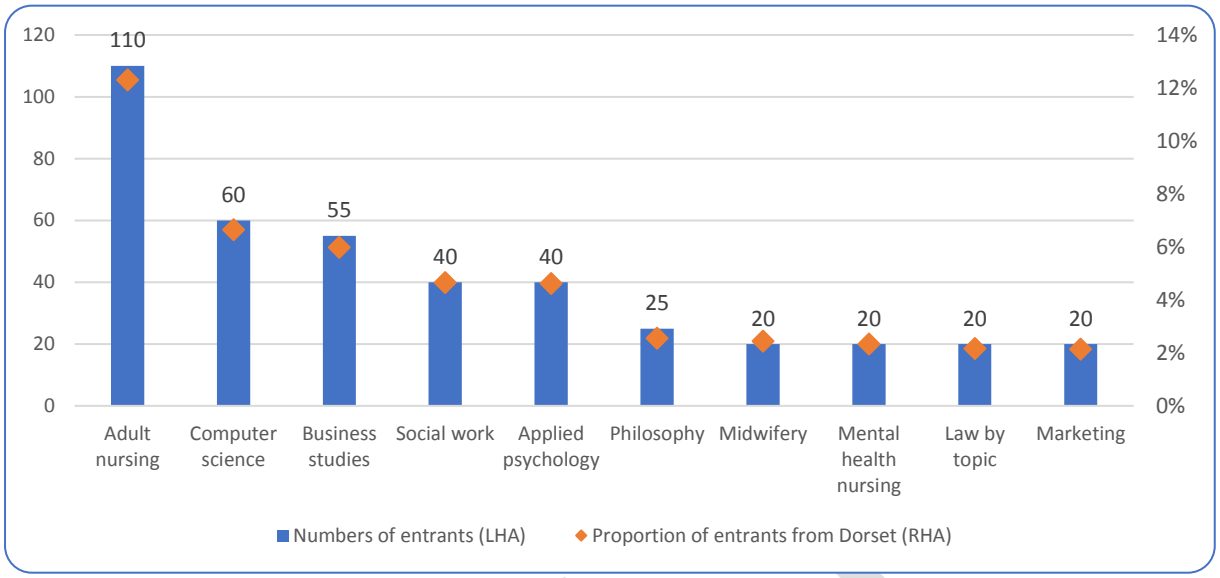


Figure 197. Top 10 subjects by entrants from Dorset (2017-18). Bournemouth University - HESA data

In terms of employment destinations of Bournemouth University students, and whether there are strong linkages with local businesses, post-study survey results indicate some interesting findings. Based on the sample of full-time first UK domiciled students who responded to the survey (2016-17), 23% of those who were in employment remained within Dorset. This indicates some strong local linkages and a 'flow' into the local economy.

Table 48. Employment destinations of undergraduate leavers in employment six months after leaving BU (2016/17). Bournemouth University – Destination of Leavers from Higher Education 2016/17 - HESA

Employed in Dorset	418
Total Employed	1,789
Proportion employed in Dorset	**23%**

Further data provided by the University indicates that having prior experience via a placement may be an important factor, although this placement hadn't necessarily needed to have been undertaken in Dorset. The below table shows that of the 418 students who were in employment in Dorset six months after leaving their undergraduate degree in 2016/17, 80% had previously undertaken a placement during their course. It is not possible to tell from the available data what proportion of those students obtained employment from the same businesses where they had undertaken their placement (either a short placement or a year-long sandwich placement).

Table 49. Students who were employed in Dorset that had previously undertaken course placements – Bournemouth University

	Employed in Dorset
No Placement	87
Sandwich Placement	135
Short Placement	194

Further survey data shows that the retention of Bournemouth University students that originated from Dorset is relatively high. Again, using 2016/17 DLHE data (based on a survey sample of 313 students who originated from Dorset and were in employment six months after leaving University) it shows that 78% (245) were employed within Dorset.

It is useful to note that the DLHE will be replaced by the Graduates Outcomes survey, with the first results from the 2017/18 survey being published in Spring 2020. In terms of future insight, the analysis of this data may be useful at a local level – given it will be more up to date and comprehensive.

Table 50. Number of undergraduate leavers (2016/17) who originated from Dorset and in employment – Bournemouth University

No. of employed graduates originally from Dorset	313
No. of graduates employed in Dorset	245
% Staying in Dorset post-graduation	**78%**

The below table shows that just under a third of students who were in employment in Dorset (2016/17) studied subjects allied to medicine.

Table 51. Studied subjects of BU graduates who were employed in Dorset (% of total). Bournemouth University – Destination of Leavers from Higher Education 2016/17 - HESA

Subject	Proportion of survey sample employed in Dorset
Subjects allied to medicine	28%
Business & administrative studies	19%
Biological science	17%
Computer science	10%
Mass communications & documentation	8%
Social studies	5%
Creative arts & design	5%
Physical science	4%
Engineering & technology	2%
Law	2%
Languages	1%

The below table shows the proportion of the same students (employed within Dorset six months after graduating) by industries – again, illustrating the strong links with medicine and human health.

Table 52. Industrial grouping (SIC-defined) of employer of BU graduates in employment in Dorset

Subject	% survey sample employed in Dorset	Subject	% survey sample employed in Dorset
Health and social work	30%	Professional, scientific and technical	5%
Wholesale and retail trade	11%	Public administration and defence	5%
Finance and insurance	8%	Arts, entertainment and recreation	5%
Information and communication	8%	Administrative and support service	3%
Accommodation and food	8%	Other service activities	1%
Education	7%	Construction	1%
Manufacturing	6%	Real estate activities	1%

Arts University Bournemouth

Demand for courses at Arts University Bournemouth (AUB) also tends to be high. As Table 54 illustrates it received just over 5 applications for its undergraduate courses in 2018, approaching 8 for some courses. It currently (2018-19 AY) enrols c. 3,400 students and c1,200 new entrants per annum (mostly at undergraduate level), focusing on its specialism in creative arts, design and performance (Figure 198).[81]

Around 62% of the enroled students in 2018-19 were 20 years of age or younger and only 3% were 30 years of age or older, which is the highest proportion of younger students when compared to the other HE providers in the area. Among the enroled students 600 (18%) had a known disability declared and 360 (13% of UK home students) were from ethnic background different from white and 560 (17%) were coming from outside of the UK.

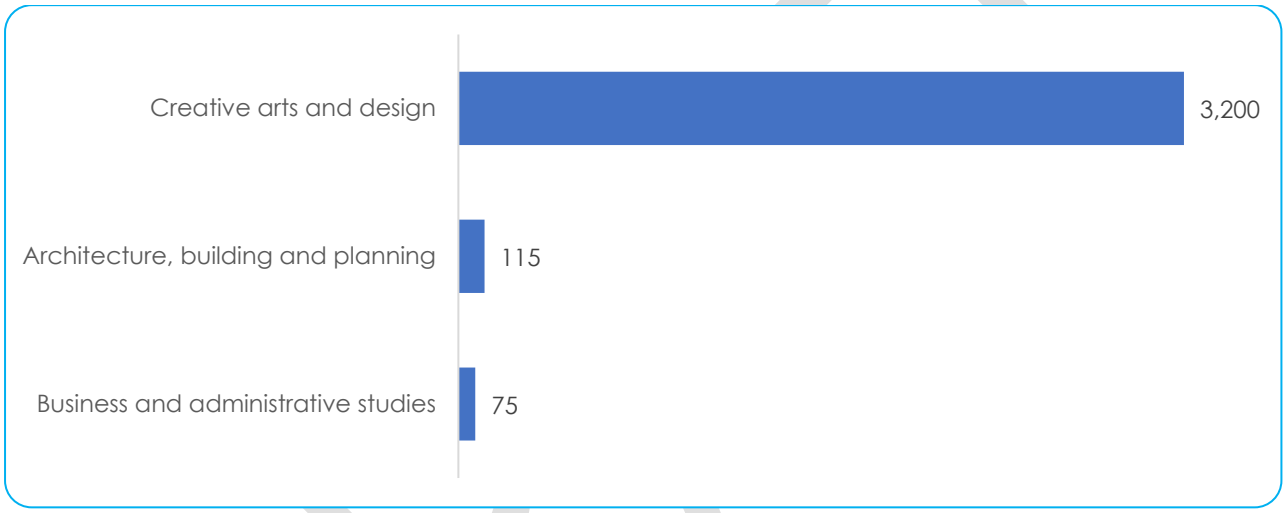


Figure 198. Arts University Bournemouth student enrolments by subject of study 2018-19. **HESA**

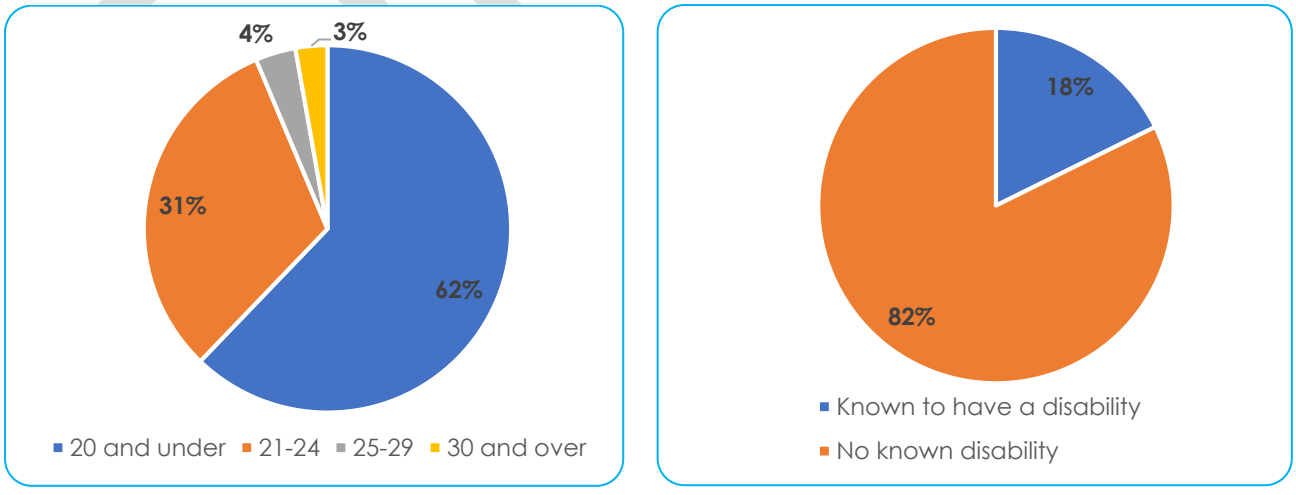


Figure 199. AUB student enrolments by age group and known disability 2018-19. HESA

[81] HESA- Higher Education Student Statistics: UK, 2018/19

There were 2,430 qualifications awarded by the university in 2018/19, c.2,280 at undergraduate and c.150 at postgraduate level, with the biggest proportions being in creative arts and design studies.

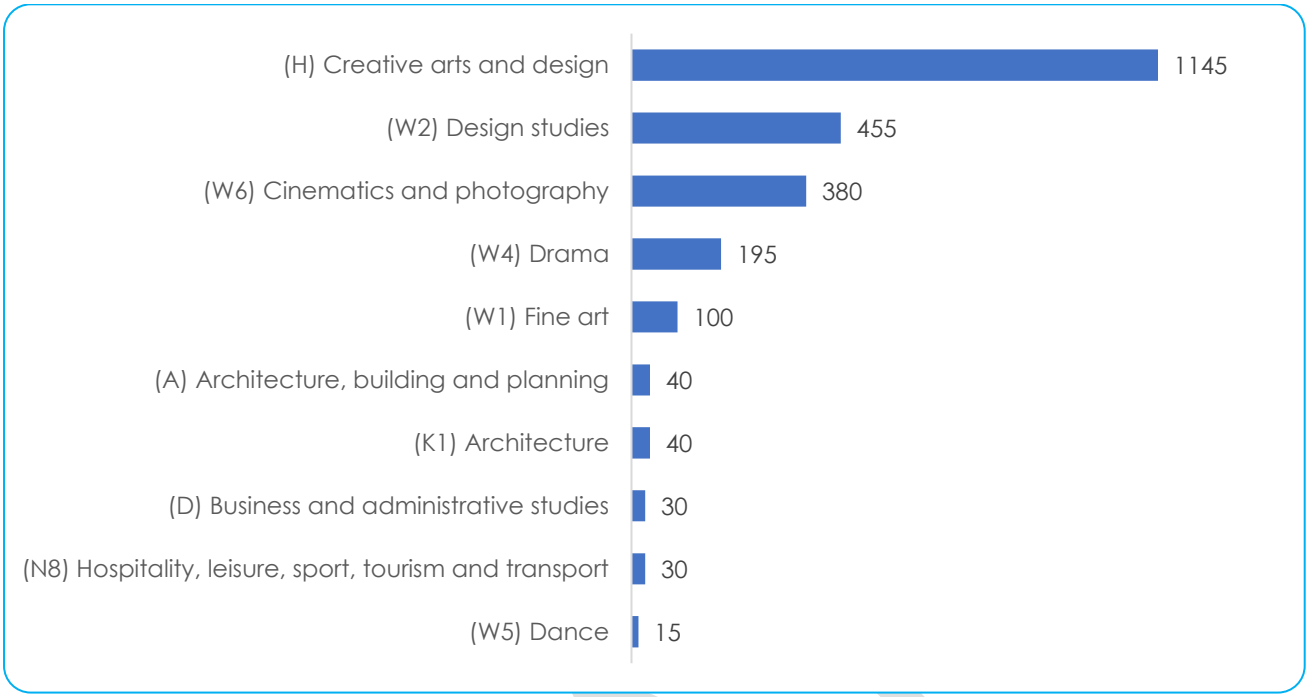


Figure 200. Arts University Bournemouth qualifications by subject area 2018-19. HESA

The below table shows the proportion of AUB students that originate from the Dorset LEP area – at an undergraduate level this equates to 17% of students from the UK.

Table 53. AUB enrolments from Dorset

	% of AUB UK enrolments from Dorset
BA (degree)	17%
Masters	52%
Prep HE	52%

In terms of post study outcomes, the University has provided some highlights showing strong employment prospects for AUB students. The data is from 2017 graduates surveyed in 2018:

- 19% (125) of AUB's UK domiciled BA graduates who responded to the survey were based in Dorset
- 96% of AUB's UK domiciled BA graduates were in work or study when surveyed
- 98% of AUB's Dorset domiciled BA graduates were in work or study when surveyed
- Of the Dorset domiciled BA graduates 27% were self-employed/freelance/running their own business and another 63% were on permanent or long-term contracts
- 80% of the Dorset domiciled graduates were in "professional" employment
- AUB/AUB Student Union itself is the largest single employer of its Dorset based graduates employing 15% of the 125 graduates living in Dorset. Other employers/jobs cover an extremely broad range including retail, photography, graphic design, marketing, social media, architects, animation, teaching, theatre, healthcare (making realistic silicone sleeves for prosthetics and orthotics) and events.

Table 54. AUB Courses

	2018	2018	2018
Courses	**Enrolment (total)**	**Enrolment (first years)**	**Applications/place**
BA (Hons) Architecture (ARB/RIBA Part 1)	95	35	5.8
BA (Hons) Interior Architecture and Design	100	35	4.7
BA (Hons) Modelmaking	120	40	3.1
BA (Hons) Fashion	130	35	5.8
BA (Hons) Fashion Branding & Communication	45	15	7.6
BA (Hons) Textiles	120	30	4.3
BA (Hons) Fine Art	220	75	4.4
BA (Hons) Illustration	250	80	6.6
BA (Hons) Graphic Design	290	95	5.3
BA (Hons) Visual Communication	130	45	3.3
BA (Hons) Animation Production	255	100	3.8
BA (Hons) Visual Effects Design and Production	85	25	3.6
BA (Hons) Film Production	335	90	7.9
BA (Hons) Acting	145	50	7.4
BA (Hons) Creative Events Management	75	20	4.4
BA (Hons) Creative Writing	40	20	5.0
BA (Hons) Dance	35	10	8.5
BA (Hons) Costume and Performance Design	205	60	3.3
BA (Hons) Make-up for Media and Performance	200	75	7.0
BA (Hons) Commercial Photography	140	55	3.2
BA (Hons) Photography	170	55	5.2
Total BA (hons)	**3,185**	**1,050**	**5.2**
Other provision			
Masters Programmes	115	90	
PhD Research Degrees	5	n/a	
Prep HE (i.e. FE provision)	305	305	

AECC University College

AECC currently (2018-19 AY) enrols c. 600 students (c. 460 of them undergraduate) and c. 280 new entrants per annum, focusing on its specialism in subjects allied to medicine.[82]

Around 63% of the enroled students in 2018-19 were 21 years of age or older and 17% were 30 years of age or older, which shows a cohort with higher proportion of mature students when compared to the other HE providers in the area. AECC also had the highest proportion of enroled students originating from non-UK countries (225, 38%).

Figure 201. AECC student enrolments by subject of study 2018-19. **HESA**

Among the enroled students 60 (10%) had a known disability declared and 65 (19% of UK home students) were from ethnic background that is different from white.

During 2018-19 academic year AECC awarded 75 postgraduate and 45 undergraduate qualifications in subject areas allied to medicine (Figure 203).

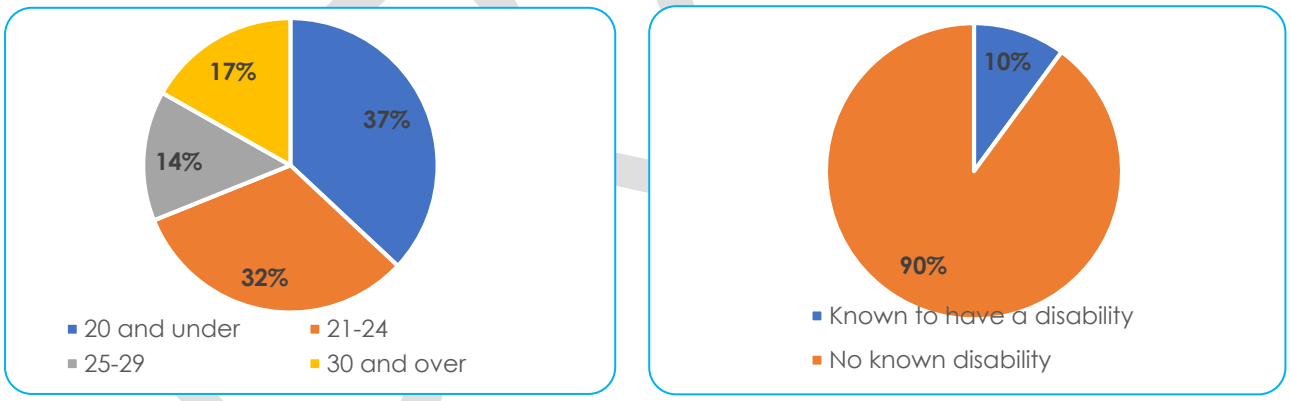


Figure 202. AECC student enrolments by age group and known disability 2018-19. HESA

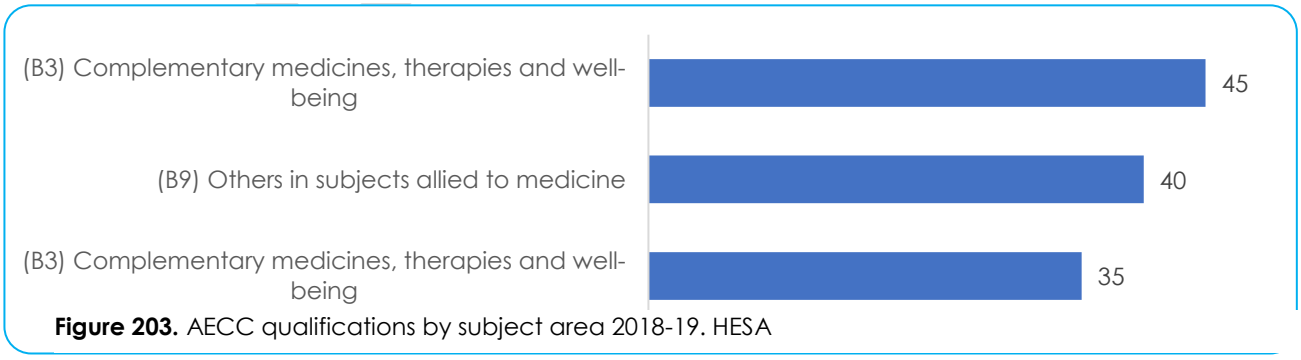


Figure 203. AECC qualifications by subject area 2018-19. HESA

[82] HESA- Higher Education Student Statistics: UK, 2018/19

Further Education (FE)

The FE colleges in Dorset offer a broad portfolio of learning opportunities, qualifications and subjects delivered across the county's geographical areas for Post 16 learners (Figure 161).

- **Bournemouth and Poole College** is based in Bournemouth and Poole (east of the county) and delivers further education, higher education and community-based courses in the east of the county, serving the conurbation of Bournemouth, Christchurch and Poole. It is among the larger British colleges in terms of the number of learners it accommodates.
- **Kingston Maurward** is an Agriculture and Horticulture college located in the scenic rural heart of West Dorset with over 70 years of experience in delivering land-based and practical subjects to all learners interested in animals, plants and the natural world.
- **Weymouth College** is based at the West Dorset coast, within one of the most deprived areas in Dorset - Weymouth & Portland.

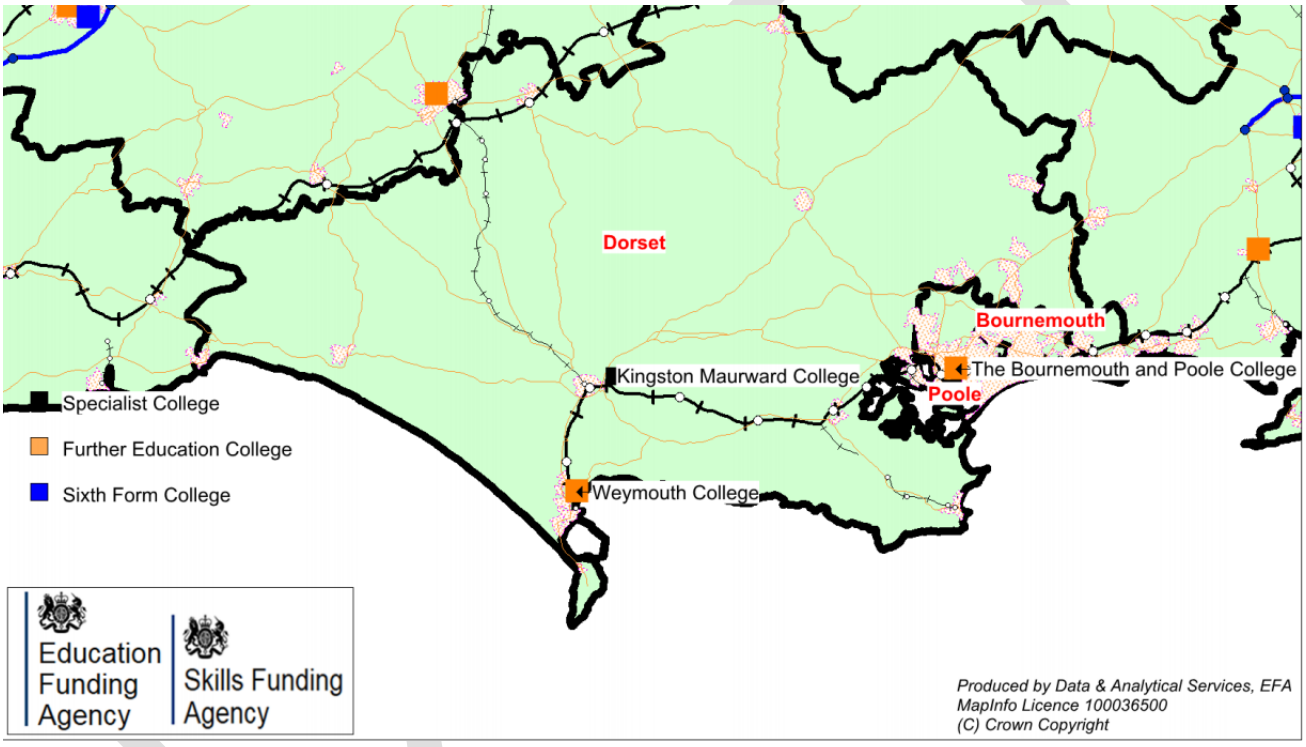


Figure 204. Dorset FE Colleges Map. DfE Dorset Area Review, 2017

Table 55. Ofsted Inspection outcomes for Dorset LEP FE colleges as of April 2020

Provider name	Year	Overall effectiveness	Year	Overall effectiveness	Year	Previous overall effectiveness	Year	Previous overall effectiveness	Web link
Bournemouth and Poole College	2019	Requires Improvement	2016	Good	2011	Good	2007	Good	Ofsted Webpage
Weymouth College	2015	Good	2015	Inadequate	2013	Requires Improvement	2010	Satisfactory	Ofsted Webpage
Kingston Maurward College	2017	Good	2014	Good	2013	Requires Improvement	2007	Good	Ofsted Webpage

Bournemouth and Poole College (BPC)

The Bournemouth and Poole College (BPC) is a major provider of skills and learning opportunities within Dorset LEP. As seen in the FE colleges participation comparison (Table 36), it is the biggest amongst the Dorset LEP FE colleges.

The age breakdown of learning aim starts in 2018/19 is shown below, with 56% being in the 16 to 18 age bracket and regarding inclusivity statistics, 12% were from Black, Asian, mixed or other ethnic minorities and 29% considered themselves as having a learning difficulty/ disability.

BPC offers an extensive range of courses at various levels. There were 16,800 learning starts over 2018-19 with large proportion of them (72%) at or below Level 2 (an individual can have several learning starts). The top 15 courses by the number of enrolments is shown in the below table.

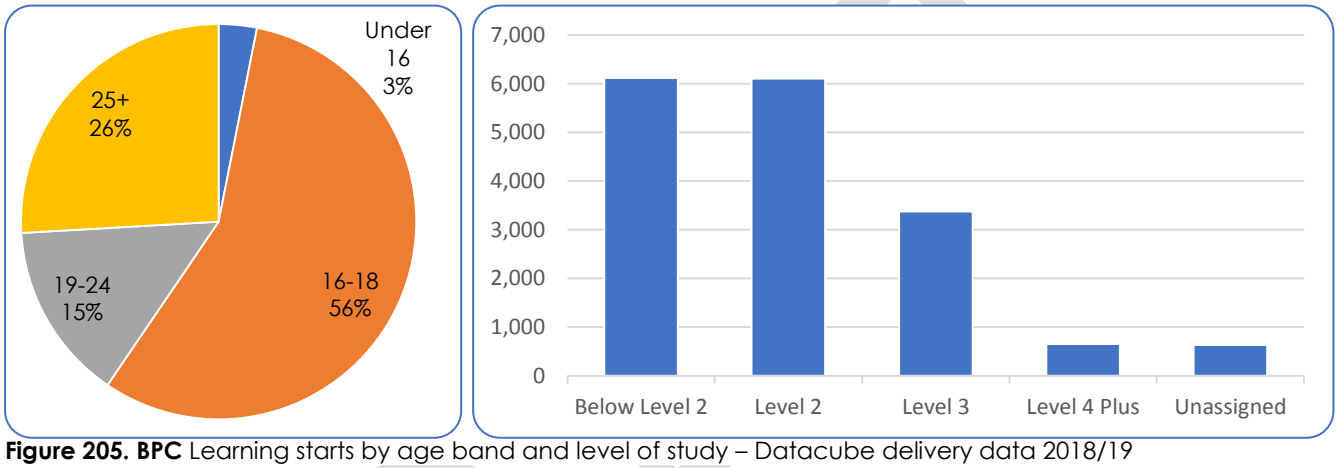


Figure 205. BPC Learning starts by age band and level of study – Datacube delivery data 2018/19

The learning aims by sector subject area by the number of starts are shown below. The largest numbers of starts are in Engineering and Health, Public Services and Care Enrolled which to large extend reflects the identified needs of the economy.

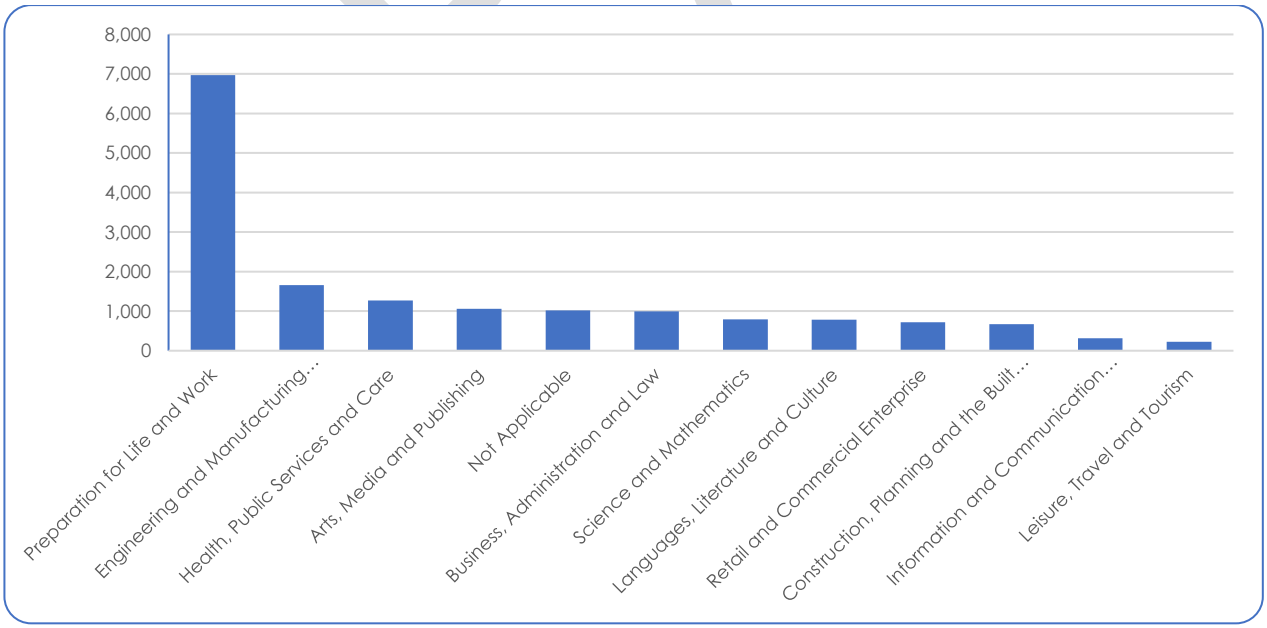


Figure 206. BPC learning aims by sector subject area by the number of starts – datacube delivery data 2018/19

The College has provided statistics illustrating how it delivers learning opportunities to individuals in more disadvantaged circumstances. Figure 207 shows the number and proportion of learners according to whether they live in the most deprived communities (as defined by the Index of Multiple Deprivation). It shows that 17% of learners at the College live in those communities classified as within the 20% most deprived in England and Wales.

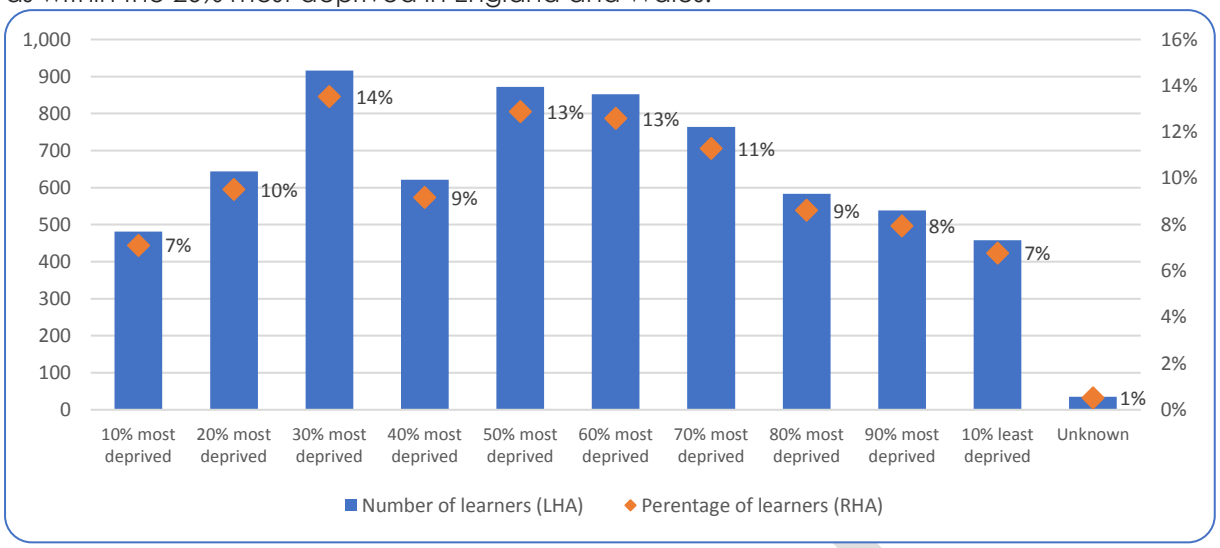


Figure 207. Bournemouth and Poole College students by residence - IMD classification (18/19)

The College has provided data on the apprenticeships it supports, including frameworks/standards in 2018/19. (Note. These are not corresponding to the data in the apprenticeship participation section which is based on learners in Dorset.) In total, BPC provided 60 different apprenticeship types and supported 1,941 apprentices. The 20 most popular courses are shown in the below table.

Table 56. Apprenticeships – Bournemouth and Poole College (18/19)

Apprenticeship (top 20 by volume – Bournemouth and Poole College)	Number of
Improving Operational Performance - 504 - level 2	232
Engineering Manufacture - 539 - level 3	229
Construction Building - 522 - level 2	121
Engineering Manufacture - 539 - level 2	95
Plumbing and Heating - 512 - level 2	88
Installation Electrician/Maintenance Electrician - 005 - level 3	81
Business and Administration - 490 - level 2	80
Electrotechnical - 513 - level 3	77
Assistant Accountant - 133 - level 3	56
Children and Young People's Workforce - 445 - level 2	55
Commis Chef - 093 - level 2	53
Senior Healthcare Support Worker - 151 - level 3	50
Plumbing and Heating - 512 - level 3	47
Vehicle Maintenance and Repair - 436 - level 2	46
Associate Project Manager - 128	44
Digital Marketer - 078 - level 3	44
Hair Professional - 157 - level 2	42
Construction Building - 522 - level 3	40
Manufacturing Engineer (degree) - 011 - level 4	29
Hairdressing - 508 - level 3	28

Again, the apprenticeship data is stratified by learner type and domicile. Figure 208 shows the number and proportion of apprentices according to IMD classifications. It shows that 7% of apprentices (lower than the overall student share) live in those communities classified as within the 20% most deprived in England and Wales.

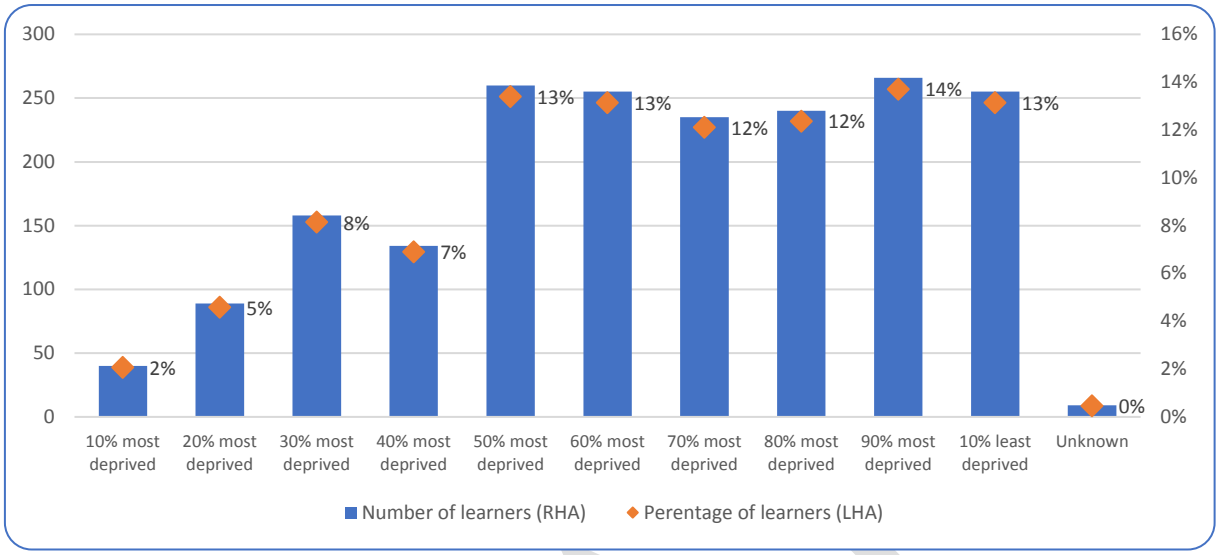


Figure 208. Apprentices Bournemouth and Poole College by residence - IMD classification (18/19)

Kingston Maurward College

Kingston Maurward College (KMC) is a land-based college located two miles from Dorchester, set in 750 acres of rural farmland, parkland, gardens and conservation area and specialising in agriculture and horticulture.

The age breakdown of learning aim starts in 2018/19 is shown below, with 65% being in the 16 to 18 age bracket. The college has lower proportion of students from Black, Asian or other ethnic minorities (1%) and higher proportion (40%) of students considered themselves as having a learning difficulty/ disability. There were 2,840 learning starts over 2018-19 with large proportion of them (67%) at or below Level 2 (an individual can have several learning starts).

The KMC curriculum is designed around the needs of Dorset and surrounding rural areas focusing on agriculture and related industries. The learning starts are shown below by sector subject areas with Agricultural and Life Sciences courses dominating the curriculum. Again, an individual can have several learning starts so this isn't the number of learners.

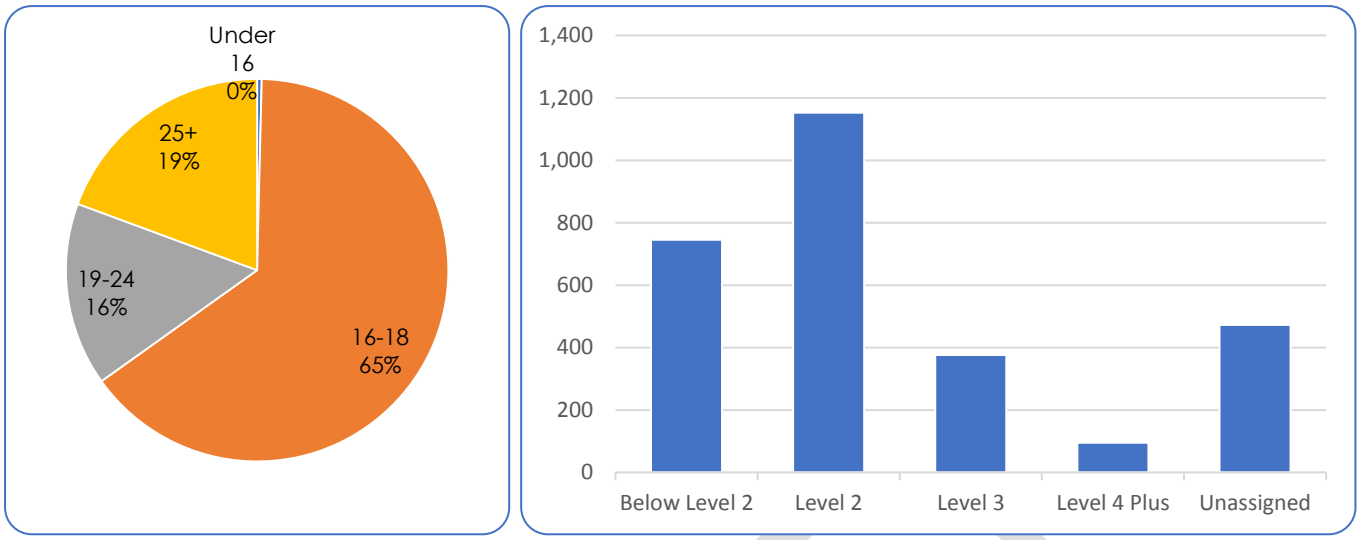


Figure 209. Kingston Maurward learning starts by age group and level 2018/19. Datacube – delivery data

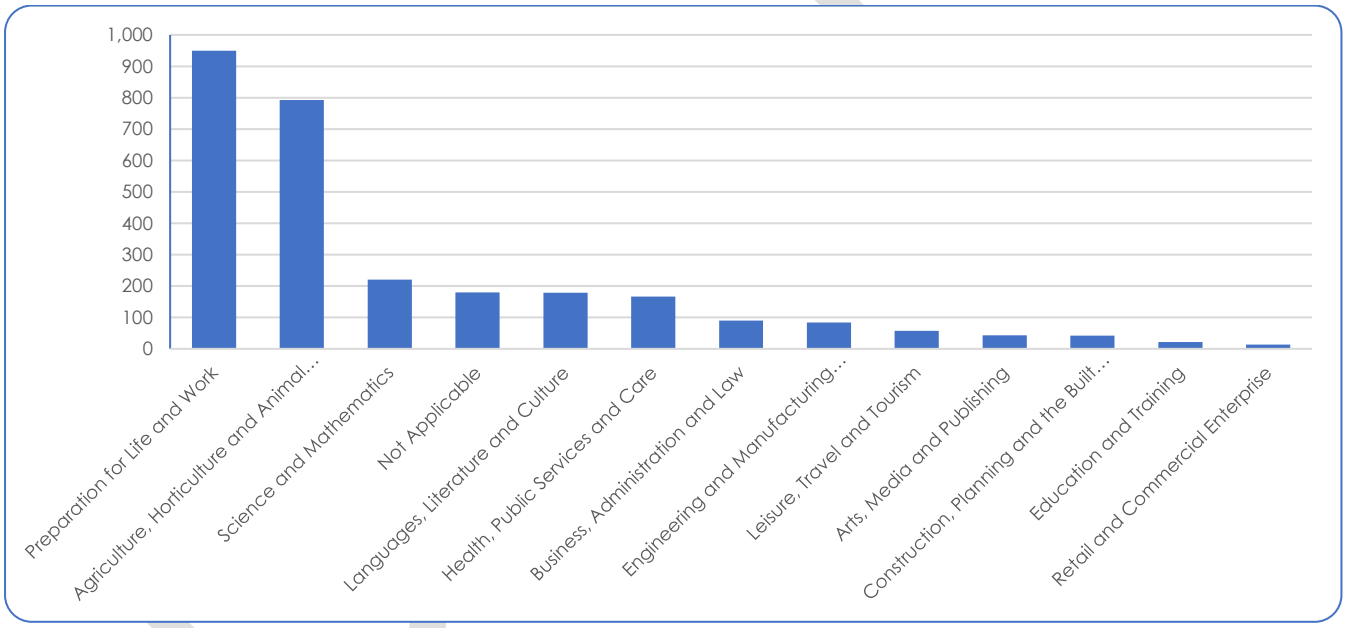


Figure 210. Kingston Maurward Learning aim starts by sector subject areas, 2018-19. DfE datacube – delivery data

The course portfolio offered by Kingston Maurward College is shown in the below table, along with the numbers enrolled on those courses during the 19/20 academic year.

Table 57. Kingston Maurward courses

Course	16-18	19+	Total
Level 1 - Practical Animal Care	24	6	30
Level 2 - Extended Certificate in Animal Care	28	7	35
Level 2 - Technical Certificate in Animal Care	60	2	62
Level 3 - Advanced Technical Diploma in Animal Management (540)		16	16
Level 3 - Advanced Technical Extended Diploma in Animal	24	0	24

Level 3 - Advanced Technical Extended Diploma in Animal	11	1	12
Level 3 - Advanced Technical Extended Diploma in Animal	12	0	12
Level 3 - Advanced Technical Extended Diploma in Animal	13	0	13
Level 3 - Advanced Technical Extended Diploma in Animal	20	0	20
Level 1 - Welding, Fabrication & Blacksmithing	26	1	27
Level 2 - Diploma in Welding, Fabrication & Blacksmithing	11	2	13
Level 3 - Advanced Technical Extended Diploma in Agriculture (1080)	12	0	12
Level 3 - Advanced Technical Extended Diploma in Agriculture (1080)	15	1	16
Level 2 - Technical Certificate in Agriculture	13	0	13
Level 1 - Introduction to Agriculture	21	0	21
Level 3 - Advanced Technical Diploma in Countryside & Wildlife	2	7	9
Level 3 - Advanced Technical Extended Diploma in Countryside &	3	1	4
Level 3 - Advanced Technical Extended Diploma in Countryside &	10	0	10
Level 2 - Technical Certificate in Wildlife Ecology & Conservation	9	0	9
Level 1 - Practical Countryside Skills	1	0	1
Level 3 - Advanced Technical Extended Diploma in Countryside &	2	0	2
Level 2 - Technical Certificate in Equine Care	8	0	8
Level 3 - Advanced Technical Extended Diploma in Equine	11	0	11
Level 3 - Advanced Technical Extended Diploma in Equine	10	0	10
Level 1 - Introduction to Horse Care & Riding	4	0	4
Level 3 - Technical Certificate in Equine Management (360)	2	0	2
Practical Skills Development - Entry Level	6	12	18
Certificate in Employability & Personal Development		11	11
Introduction to Skills for Working Life - E2	14	9	23
Skills for Working Life - E3	8	11	19
Introduction to Skills for Working Life - E3	1	0	1
Level 2 - Diploma in Floristry	5	6	11
Fast Track Level 3 - Subsidiary Diploma in Floristry	3	5	8
Level 2 - Diploma in Construction Maintenance Operations	13	1	14
Level 1 - Diploma in Construction Skills	22	0	22
Level 1 - Practical Horticulture Skills	2	0	2
Level 2 - Technical Certificate in Forestry & Arboriculture	10	0	10
Level 2 - Technical Certificate in Horticulture	16	2	18
Level 1 - Practical Arboriculture Skills	4	0	4
Level 3 - Extended Diploma in Outdoor Adventure	5	0	5
Level 3 - Extended Diploma in Outdoor Adventure	9	0	9
Level 3 - Extended Diploma in Uniformed Public Services	14	0	14
Level 3 - Extended Diploma in Uniformed Public Services	6	0	6
Level 3 - Extended Diploma in Sport & Fitness	4	0	4
Level 3 - Diploma in Outdoor Adventure	3	1	4
Level 3 - Diploma in Outdoor Adventure	4	0	4
Level 2 - First Diploma in Uniformed Public Services	17	0	17
Level 2 - First Diploma in Sport & Fitness	8	0	8
Level 2 - First Diploma in Outdoor Adventure	9	0	9
Level 2 - Military Preparation	18	1	19

Level 1 - Personal Development & Public Services	11	1	12
Level 3 - Extended Diploma in Sport & Fitness	7	0	7
Level 3 - 90 Credit Military Preparation	2	0	2
Level 3 - Extended Diploma in Military Preparation	13	0	13
Level 3 - Extended Diploma in Military Preparation	13	1	14
Level 3 - Diploma in Sport and Fitness	1	0	1
Level 3 - Diploma in Military Preparation	2	0	2
Level 3 - Diploma in Military Preparation	10	1	11
Level 3 - Diploma in Public Services	7	0	7
Level 3 - Extended Diploma in Sport (Rugby pathway)	1	0	1
Level 3 - Diploma in Sport & Fitness	15	1	16
Total	**635**	**107**	**742**

Weymouth College

Weymouth College is an important provider of skills and training opportunities based at the West Dorset Coast. Reported as the third most isolated General FE college, it services a wide geography with many students travelling in from rural areas within what is one of the most deprived part of Dorset - Weymouth & Portland.

Within this context of many long-standing structural and socioeconomic issues and where issues around accessibility to learning are a particular problem, Weymouth College plays an important role in providing employment pathways to students from a wide variety of backgrounds.

The last **Ofsted** Inspection (November 2015) awarded the College Grade 2 'Good', signifying a remarkable recovery after an Inadequate grade from previous inspection and illustrating the resilience of the institution and its current leadership team to deliver high outcomes and standards despite the constraints.

The age breakdown of learning aim starts in 2018/19 is shown below, with 73% being in the 16 to 18 age bracket. The college also has lower proportion of students from Black, Asian or other ethnic minorities (5%) and a quarter (25%) of students considered themselves as having a learning difficulty/ disability. There were 4,827 learning starts over 2018-19 with large proportion of them (67%) at or below Level 2 (an individual can have several learning starts).

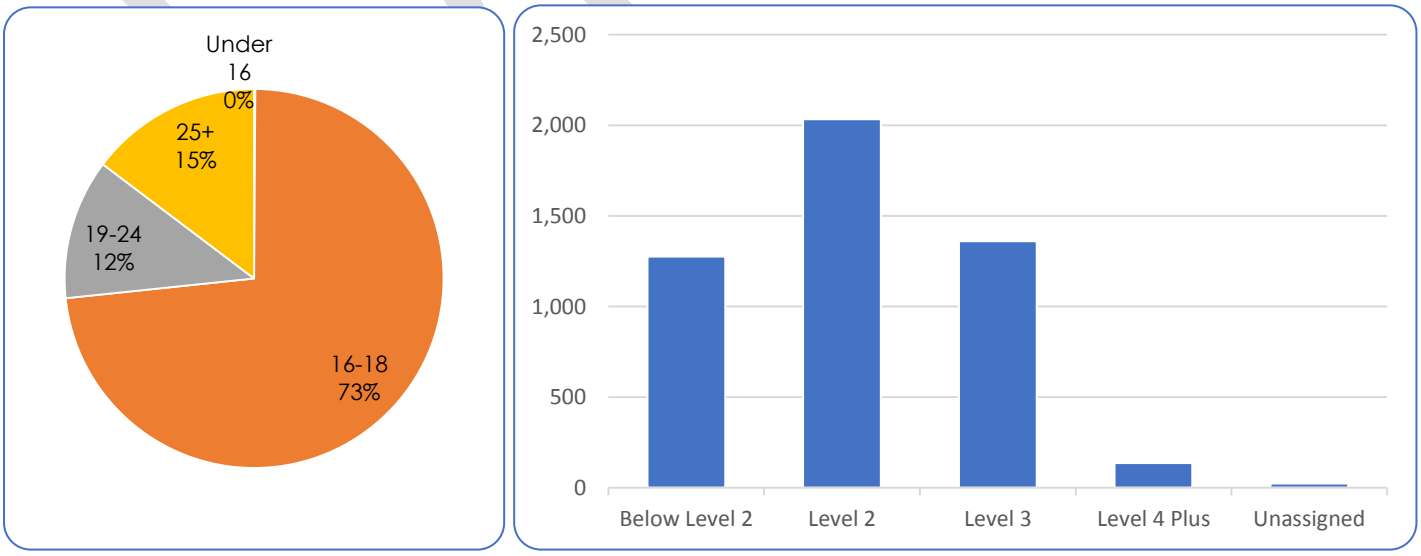


Figure 211. Weymouth College learning starts by age group and level 2018/19. Datacube – delivery data

The curriculum is designed around the needs of Dorset and surrounding rural areas focusing on agriculture and related industries. The learning starts are shown below by sector subject areas with Agricultural and Life Sciences courses dominating the curriculum. Again, an individual can have several learning starts so this isn't the number of learners

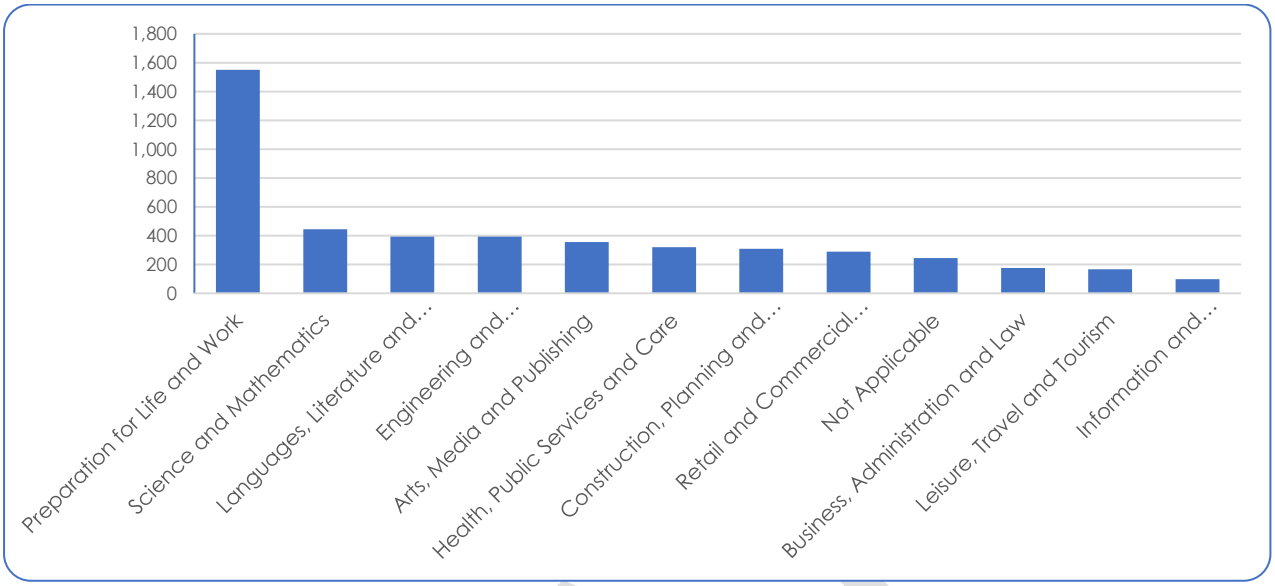


Figure 212. Weymouth College Learning aim starts by sector subject areas, 2018-19. DfE datacube – delivery data

The following information and charts are provided by the College as part of its annual Self-Assessment Report.[83]
During 2018/19 the College offered its almost 3000 students a varied curriculum. The majority of the students (59%) are enrolled on FE courses, 15% on HE courses and 16% on Apprenticeships. The College offers the range of provision from Entry through to Level 3 for the majority of courses and Higher Education (HE) progression routes based on strongly recruiting Level 3 provision.

Weymouth College is currently **in the process of validation for a full BSc in Health Studies** which is in line with the increased demand in the health professions as outlined earlier in thisof this report.

The student profile is generated from Education, Skills Funding Agency funded provision and includes:

- 76 students with Educational Health Care Plans (EHCPs)
- Over 50% of students assessed to be in need of Additional Learning Support (ALS)
- 27 students are Looked After Children (LACs), and in 2018 – 19 the safeguarding team reported over 600 instances of vulnerability - the largest group identified with mental health issues
- In line with social mobility and areas of multiple deprivation, 25% of the whole student body reside in wards band 1/2/3, the most deprived areas nationally. The College population is 5% Black Asian and Minority Ethnic, with 93% declared as White and 2% unknown.

[83] Weymouth College Self-assessment report 2018-19

Adult Community Education

The Adult and Community Learning, delivered through BCP Council but provided throughout the Dorset, provides a range of learning opportunities for adult learners. It delivers across c90 centres across the area, delivering c1,300 courses and 5,800 learners. Therefore, it is a significant provider of post-16 training. A significant proportion of its learners progress to higher levels of skills/learning and it plays an important role in supporting people from disadvantaged backgrounds. 25% of the individuals enrolled on its courses live within the 25% most deprived wards, as measured by the Index of Multiple Deprivation. 60% of participants on its skills and learning courses were unemployed. Learners with a learning difficulty and/or disability constituted one-third of the total learner cohort and 17.5% learners were from minority ethnic groups; both significantly higher than local population profiles. The learner demographics are set out in the below table.

Table 58. Adult Community Education – BCP Council

Learner Demographics	Numbers (17/18)	% (17/18)
Overall	5,388	
Males	1,797	33.4%
Ethnic minority	944	17.5%
Unemployed	3,227	59.9%
From disadvantaged areas	1,823	34.9%
Disability	1,697	31.5%

Learners on qualification and employability courses took part in a positive outcomes survey and of those who responded[84], 83% were in work, volunteering, further learning or training. 70% reported improved self confidence and 71% reported improved skills for work as a result of doing the course. Ofsted awarded the service Grade 2 – Good for all aspects of provision inspected in June 2015 and confirmed this grade in the 2017 short inspection.

672 learners participated in the community learning impact survey. Of these 39% were in employment, volunteering or further learning when contacted after their course. Of the 165 learners who were seeking employment at the start of the course, 32% were in employment when contacted after the course. In addition, learners reported many other benefits of learning

[84] The size of the survey sample now known

Glossary

AECC – AECC University College

AUB – Arts University Bournemouth

BCP – Bournemouth, Christchurch and Poole (in this report this tends to refer to the area rather than the Local Authority)

BU – Bournemouth University

DfE – Department for Education

DLEP – Dorset Local Enterprise Partnership (as above regarding geographical area)

ESS – Employers Skills Survey

FE – Further Education

FSM – Free School Meals

GVA – Gross Value Added

HE – Higher Education

HESA – Higher Education Statistics Agency

IMD – Index of Multiple Deprivation

LDD – Learning Difficulties and Disabilities

LEFM – Local Economic Forecasting Model

LIS – Local Industrial Strategy

NAO – National Audit Office

NEET – Not in Education, Employment, or Training

NVQ – National Vocation Qualification

ONS – Office of National Statistics

SAP – Skills Advisory Panel

SIC – Standard Industrial Classification

SOC – Standard Occupational Classification

SSV – Skills Shortage Vacancy

STEM – Science, Technology, Engineering and Maths

UKCES – UK Commission for Employment and Skills

Data sources

Economic Context:	
Labour market engagement	Annual Population Survey (ONS), Alternative Claimant Count
Earnings	Annual Survey of Hours and Earnings (ONS), Living Wage
Rural Earnings, Industry Earnings	DEFRA rural statistics, Annual Survey of Hours and Earnings (ONS)
Underemployment	Underemployment and overemployment levels by local
Labour Productivity	Regional Gross Value Added (ONS)
Social Mobility	Social Mobility Commission
Occupational Structure	Annual Population Survey (ONS)
Demographics	2017-based trend-led population projections (ONS)
Demographic/skills risk	Localis/Dorset Council
Demand for labour and skills:	
Replacement demand	Working Futures 2017-27 – Dorset workbooks
Occupational change	Annual Population Survey (ONS)
Current labour demand	Labour Insight (Burning Glass)
Vacancies and skills shortages	Vacancy Survey (ONS), Employer Skills Survey 2017 (DfE)
Future job demand	Working Futures 2017-2027 (DfE – Warwick Institute for
Roles and skills in demand	Examine a Place toolkit (DWP)
Supply of labour and skills:	
Accessibility to learning	DEFRA statistics
On-the-job training	Job related training (ONS)
Qualification levels	School attainment data at Key Stage 2, 4 & 5 (DfE)
Destination data	Longitudinal Education Outcomes dataset (DfE)
Further Education participation	Further education and skills data (DfE and ESFA)
Further Education provision	Further education and skills data (DfE and ESFA)
Apprenticeship data	Apprenticeship Data Pack (DfE)
16-19 provision	16 to 19 allocations (ESFA)
Information from providers (FE &	Bournemouth & Poole College, Weymouth College, Kingston
Information from providers (HE)	Bournemouth University, Arts University Bournemouth
Higher Education participation	Higher Education Statistics Agency
Graduates Outcome data	Longitudinal Education Outcomes (LEO) Dataset (DfE)
School attainment	Analysis of National Pupil Database – Education Policy Institute
Future Skills:	
Future skills and labour market	The Future of Skills: Employment in 2030 (NESTA), Working Futures,

Appendix: Full List of providers with recorded apprenticeship starts 2016/17 – 2018/19. Datacube (Learners Delivery)

Provider	2016/17	2017/18	2018/19
General FE College incl Tertiary	**1,995**	**1,540**	**1,595**
BOURNEMOUTH AND POOLE COLLEGE, THE	887	837	892
WEYMOUTH COLLEGE	261	204	240
YEOVIL COLLEGE	136	167	135
WILTSHIRE COLLEGE AND UNIVERSITY CENTRE	23	22	74
EASTLEIGH COLLEGE	79	43	56
BROCKENHURST COLLEGE	97	57	27
BRIDGWATER AND TAUNTON COLLEGE	23	32	26
HAVANT AND SOUTH DOWNS COLLEGE		3	25
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	4	6	21
EXETER COLLEGE	16	13	12
CORNWALL COLLEGE	14	6	11
SOUTHAMPTON CITY COLLEGE	10	5	11
DUDLEY COLLEGE OF TECHNOLOGY	9	4	8
EAST SUSSEX COLLEGE GROUP	13	8	7
CHICHESTER COLLEGE GROUP	13	3	5
HEART OF WORCESTERSHIRE COLLEGE	2		5
FAREHAM COLLEGE		6	4
HULL COLLEGE	57	17	4
WARWICKSHIRE COLLEGE	2	3	4
ACTIVATE LEARNING	4	2	3
HIGHBURY COLLEGE PORTSMOUTH	5	1	3
STRODE COLLEGE		3	3
UNITED COLLEGES GROUP	41	17	3
ADA NATIONAL COLLEGE FOR DIGITAL SKILLS			2
STEPHENSON COLLEGE	1		2
BEDFORD COLLEGE	1		1
BLACKPOOL AND THE FYLDE COLLEGE		2	1
CARDIFF AND VALE COLLEGE		14	1
CITY OF WOLVERHAMPTON COLLEGE			1
HEREFORDSHIRE, LUDLOW, AND NORTH SHROPSHIRE		1	1
NORTH HERTFORDSHIRE COLLEGE	3	1	1
NORTH WARWICKSHIRE AND SOUTH LEICESTERSHIRE	1		1
NOTTINGHAM COLLEGE		8	1
SHEFFIELD COLLEGE, THE	1	1	1
THE CITY OF LIVERPOOL COLLEGE			1
THE WKCIC GROUP	1		1
WEST SUFFOLK COLLEGE			1
AYLESBURY COLLEGE	2		
BARNET & SOUTHGATE COLLEGE	41		
BASINGSTOKE COLLEGE OF TECHNOLOGY	44	1	
BATH COLLEGE	1		
BOURNVILLE COLLEGE	5		
BRACKNELL AND WOKINGHAM COLLEGE	3	1	

Provider	2016/17	2017/18	2018/19
BROMLEY COLLEGE OF FURTHER AND HIGHER EDUCATION	1		
BROOKLANDS COLLEGE	5	1	
CENTRAL COLLEGE NOTTINGHAM	43		
CHESTERFIELD COLLEGE	1		
CITY COLLEGE COVENTRY	1		
CITY COLLEGE PLYMOUTH	1	1	
CITY OF BRISTOL COLLEGE	1	1	
COLCHESTER INSTITUTE	3	1	
DERWENTSIDE COLLEGE	1	1	
EALING, HAMMERSMITH & WEST LONDON COLLEGE	1	1	
GATESHEAD COLLEGE	18	1	
GUILDFORD COLLEGE OF FURTHER AND HIGHER	1		
HERTFORD REGIONAL COLLEGE	1		
KIDDERMINSTER COLLEGE	7		
LEEDS CITY COLLEGE	7	2	
LEEDS COLLEGE OF BUILDING		1	
LEICESTER COLLEGE	2		
LEWISHAM SOUTHWARK COLLEGE	4		
LOUGHBOROUGH COLLEGE	7	12	
NEW COLLEGE SWINDON	11	5	
NEWHAM COLLEGE OF FURTHER EDUCATION		1	
NORTH KENT COLLEGE	2		
REDBRIDGE COLLEGE	9		
RNN GROUP	5	2	
SALFORD CITY COLLEGE		1	
SOLIHULL COLLEGE AND UNIVERSITY CENTRE		1	
SOUTH BANK COLLEGES	2	6	
SOUTH ESSEX COLLEGE	3		
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	3	1	
THE COLLEGE OF WEST ANGLIA	5		
TYNE COAST COLLEGE	1		
WALSALL COLLEGE	3	2	
WALTHAM FOREST COLLEGE		1	
WEST NOTTINGHAMSHIRE COLLEGE	27	10	
WIGAN AND LEIGH COLLEGE	19		
Other Public Funded i.e LA's and HE	**2,268**	**2,512**	**2,152**
BRITISH ARMY	2,076	2,190	1,804
BOURNEMOUTH CHRISTCHURCH AND POOLE COUNCIL	67	49	78
THE OPEN UNIVERSITY	15	16	68
SOLENT UNIVERSITY	3	14	34
UNIVERSITY OF EXETER		2	34
POOLE HOSPITAL NHS FOUNDATION TRUST		47	24
BOURNEMOUTH UNIVERSITY			20
BPP UNIVERSITY LIMITED		49	15
CITB	97	122	13
ANGLIA RUSKIN UNIVERSITY HIGHER EDUCATION	1	6	12
CRANFIELD UNIVERSITY		1	8

Provider	2016/17	2017/18	2018/19
UNIVERSITY OF THE WEST OF ENGLAND, BRISTOL		3	6
THE UNIVERSITY OF BATH			5
UNIVERSITY OF CAMBRIDGE			4
UNIVERSITY OF WINCHESTER		1	3
GREGGS PLC			2
THE UNIVERSITY OF READING			2
THE UNIVERSITY OF WARWICK			2
UNIVERSITY OF PORTSMOUTH		1	2
BUCKINGHAMSHIRE NEW UNIVERSITY			1
CITY, UNIVERSITY OF LONDON	1		1
GREATER MANCHESTER COMBINED AUTHORITY			1
HAMPSHIRE COUNTY COUNCIL			1
LONDON SOUTH BANK UNIVERSITY			1
LOUGHBOROUGH UNIVERSITY			1
MANCHESTER METROPOLITAN UNIVERSITY		2	1
OXFORD BROOKES UNIVERSITY			1
QUEEN MARY UNIVERSITY OF LONDON			1
THE UNIVERSITY OF CHICHESTER	1		1
UNIVERSITY OF BEDFORDSHIRE			1
UNIVERSITY OF CENTRAL LANCASHIRE			1
UNIVERSITY OF GLOUCESTERSHIRE			1
UNIVERSITY OF HERTFORDSHIRE			1
UNIVERSITY OF STRATHCLYDE			1
WESTMINSTER CITY COUNCIL			1
ASTON UNIVERSITY	1	1	
COMMON COUNCIL OF THE CITY OF LONDON	1		
COUNTY DURHAM COUNCIL	2		
LEEDS BECKETT UNIVERSITY		1	
LONDON AMBULANCE SERVICE NHS TRUST		1	
SHEFFIELD HALLAM UNIVERSITY		1	
TEESSIDE UNIVERSITY	2		
THE UNIVERSITY OF KENT		1	
THE UNIVERSITY OF SHEFFIELD		1	
UNIVERSITY OF EAST LONDON		1	
UNIVERSITY OF LINCOLN	1		
UNIVERSITY OF PLYMOUTH		1	
UNIVERSITY OF ULSTER		1	
Private Sector Public Funded	**4,022**	**2,840**	**2,594**
LIFETIME TRAINING GROUP LIMITED	303	305	328
PARAGON EDUCATION & SKILLS LIMITED	566	275	215
QUEST VOCATIONAL TRAINING LIMITED		159	189
ASPIRE TRAINING TEAM LIMITED	170	131	125
HIT TRAINING LTD	265	137	123
BABCOCK TRAINING LIMITED	291	100	92
PEOPLEPLUS GROUP LIMITED	2	33	71
SMART TRAINING AND RECRUITMENT LIMITED	109	54	59
FRANCESCO GROUP (HOLDINGS) LIMITED	57	60	55

Provider	2016/17	2017/18	2018/19
MARR CORPORATION LIMITED	85	40	54
QUBE QUALIFICATIONS AND DEVELOPMENT LIMITED	28	24	46
LOCOMOTIVATION LTD.	96	48	45
BPP PROFESSIONAL EDUCATION LIMITED		15	44
KAPLAN FINANCIAL LIMITED	18	61	44
SOUTH WEST ASSOCIATION OF TRAINING PROVIDERS	129	175	41
AGINCARE GROUP LIMITED		54	31
HADDON TRAINING LIMITED	27	23	28
CORNDEL LIMITED		15	27
FNTC TRAINING AND CONSULTANCY LIMITED	238	72	26
HAYS TRAVEL LIMITED	24	24	26
THE CHILD CARE COMPANY (OLD WINDSOR) LIMITED	2	6	26
SEETEC BUSINESS TECHNOLOGY CENTRE LIMITED		5	24
BC ARCH LIMITED	2	13	20
BRITISH AIRWAYS PLC			20
BCTG LIMITED	4	9	19
BRITISH TELECOMMUNICATIONS PUBLIC LIMITED COMPANY	28	28	18
GP STRATEGIES TRAINING LIMITED	13	27	18
QA LIMITED	19	17	18
M I T SKILLS LIMITED	16	1	17
TEMP DENT DENTAL AGENCY LIMITED	1	12	16
IMPACT FUTURES TRAINING LIMITED	1		15
JTL	27	19	14
JUST IT TRAINING LIMITED			14
SKILLCERT LIMITED			14
BABINGTON BUSINESS COLLEGE LIMITED	23	19	13
FAREPORT TRAINING ORGANISATION LIMITED	41	17	13
LYNWOOD VETS LIMITED		8	13
CIPS CORPORATE SERVICES LIMITED			12
KIWI EDUCATION LTD		13	12
QUALITRAIN LIMITED		13	12
CAPITA PLC	9	7	11
INTEC BUSINESS COLLEGES LIMITED	11	7	11
WHITBREAD PLC	14	18	11
CHEYNE'S (MANAGEMENT) LIMITED	20	13	10
CQM TRAINING AND CONSULTANCY LIMITED		1	10
CENTRAL YOUNG MEN'S CHRISTIAN ASSOCIATION			9
D MANTLE LIMITED		2	9
HTP APPRENTICESHIP COLLEGE LTD	9	10	9
IMPELLAM GROUP PLC		1	9
JUICE TALENT DEVELOPMENT LIMITED		2	9
LAWTONASH TRAINING SERVICES LTD			9
PROSPECTS TRAINING INTERNATIONAL LIMITED	1	2	9
THE CARE LEARNING CENTRE (ISLE OF WIGHT) LIMITED	30	12	9
TOTAL PEOPLE LIMITED	2	6	9
UNIVERSITY COLLEGE OF ESTATE MANAGEMENT		3	9
AAA TRAINING SOLUTIONS LIMITED			8

Provider	2016/17	2017/18	2018/19
ASPIRATION TRAINING LIMITED		10	8
CAPTIVA LEARNING LIMITED		1	8
SUPERDRUG STORES PLC	10	9	8
BESTLAND SOLUTIONS LIMITED		1	7
BUTTERCUPS TRAINING LIMITED	1	8	7
REMIT GROUP LIMITED	33	19	7
SSE SERVICES PLC	16	17	7
THE IT SKILLS MANAGEMENT COMPANY LIMITED		3	7
TRAVIS PERKINS PLC		10	7
TRN (TRAIN) LTD.		1	7
ACCESS SKILLS LTD	16	9	6
BOOM TRAINING LIMITED			6
CROSBY MANAGEMENT TRAINING LTD		2	6
INTERSERVE LEARNING & EMPLOYMENT (SERVICES) LIMITED	12	19	6
PGL TRAINING (PLUMBING) LIMITED	2	4	6
REED BUSINESS SCHOOL LIMITED		2	6
S & B AUTOMOTIVE ACADEMY LIMITED	5	6	6
SKILLNET LIMITED	18	12	6
WORKPAYS LIMITED		5	6
ACACIA TRAINING LIMITED	2	5	5
GLP TRAINING LTD		2	5
HAPPY COMPUTERS LIMITED		1	5
IMPACT LEARNING & DATA SOLUTIONS LIMITED	11	14	5
LEONARDO MW LTD		6	5
PGL TRAVEL LIMITED		1	5
PROGRESS TO EXCELLENCE LTD	15	16	5
SPECSAVERS OPTICAL SUPERSTORES LIMITED	7	14	5
STEADFAST TRAINING LTD		1	5
THE APPRENTICESHIP COLLEGE LTD			5
UMBRELLA TRAINING AND EMPLOYMENT SOLUTIONS LIMITED		1	5
WORKING LINKS (EMPLOYMENT) LIMITED			5
ACCOUNTANCY LEARNING LTD		4	4
BRITISH PRINTING INDUSTRIES FEDERATION LTD	5	1	4
BUSY BEES NURSERIES LIMITED	1	5	4
CITRUS TRAINING SOLUTIONS LTD.		1	4
FIRST INTUITION READING LIMITED		3	4
HALFORDS LIMITED	2	10	4
HARRIET ELLIS TRAINING SOLUTIONS LIMITED			4
IXION HOLDINGS (CONTRACTS) LIMITED		9	4
JAG TRAINING LIMITED			4
KEY TRAINING LIMITED	13	3	4
MOMENTUM TRAINING AND CONSULTANCY LTD	4	3	4
NORTHERN TRAINING ACADEMY LIMITED			4
PARETO LAW LIMITED			4
PROVQ LIMITED	2	7	4
SKILLS TRAINING UK LIMITED	2	13	4
BOOTS OPTICIANS PROFESSIONAL SERVICES LIMITED	2		3

Provider	2016/17	2017/18	2018/19
CALEX UK LTD		4	3
CSM CONSULTING LIMITED	8	8	3
DAMAR LIMITED	3	8	3
DIDAC LIMITED	3	4	3
DIMENSIONS TRAINING SOLUTIONS LIMITED			3
EDUCATION AND TRAINING SKILLS LTD		11	3
ERNST & YOUNG LLP		5	3
G B TRAINING (UK) LTD			3
GREY SEAL ACADEMY LIMITED			3
INTERNATIONAL CORRESPONDENCE SCHOOLS LIMITED		1	3
KINGSWOOD LEARNING AND LEISURE GROUP LIMITED		1	3
LEAGUE FOOTBALL EDUCATION	4	4	3
OUTSOURCE VOCATIONAL LEARNING LIMITED	1	1	3
THE CHARTERED INSTITUTE OF HOUSING			3
THE INSTITUTE OF REVENUES, RATING AND VALUATION			3
THE REAL APPRENTICESHIP COMPANY LIMITED	9	4	3
THE UNIVERSITY OF LAW LIMITED			3
TRAINING EVENT SAFETY SOLUTIONS LTD			3
TVS EDUCATION LIMITED			3
UNIVERSAL SKILLS CENTRE LIMITED			3
WISER ACADEMY LIMITED			3
ACACIA TRAINING AND DEVELOPMENT LTD	17	7	2
APPRENTICESHIP LEARNING SOLUTIONS LIMITED		2	2
APPRENTICESHIPS & TRAINING SERVICES CONSORTIUM	4	5	2
ASSIST KNOWLEDGE DEVELOPMENT LIMITED			2
BAE SYSTEMS PLC	2	3	2
CAMBRIDGE SPARK LIMITED			2
CILEX LAW SCHOOL LIMITED			2
CREATIVE PROCESS DIGITAL LTD			2
CSR SCIENTIFIC TRAINING LIMITED		2	2
ENGINEERING TRUST TRAINING LIMITED		2	2
FIREBRAND TRAINING LIMITED		1	2
FIRST INTUITION BRISTOL LIMITED		5	2
FLEETMASTER TRAINING LIMITED			2
FUEL LEARNING LIMITED		1	2
GI GROUP RECRUITMENT LTD	21	26	2
GK APPRENTICESHIPS LIMITED			2
HAIR ACADEMY SOUTH WEST LIMITED	7	4	2
HAWK MANAGEMENT (UK) LIMITED	1	5	2
ICON VOCATIONAL TRAINING LIMITED	24	5	2
JD ACADEMY LIMITED		1	2
JRV ASSOCIATES LIMITED			2
MITRE GROUP LIMITED		7	2
NACRO	1	6	2
NEW MODEL BUSINESS ACADEMY LIMITED		3	2
POPCORN LEARNING MEDIA LIMITED			2
REDSKY LEARNING LIMITED			2

Provider	2016/17	2017/18	2018/19
REED SPECIALIST RECRUITMENT LIMITED		1	2
RENTOKIL INITIAL (1896) LIMITED		1	2
SERCO LIMITED	2	1	2
SOMERSET SKILLS & LEARNING CIC	10	10	2
SYSTEM GROUP LIMITED	7	7	2
THE FOOTBALL ASSOCIATION PREMIER LEAGUE LIMITED	8	4	2
TUI UK LIMITED			2
VOYAGE GROUP LIMITED	4	6	2
ABSOLUTE HR SOLUTIONS LTD.			1
ACTIVE LEARNING & DEVELOPMENT LIMITED			1
ADECCO UK LIMITED			1
ASPENS-SERVICES LIMITED			1
ASPIRE ACHIEVE ADVANCE LIMITED	16	14	1
ASPIRE DEVELOPMENT (UK) LTD			1
AVENSYS UK TRAINING LIMITED			1
BABCOCK SKILLS DEVELOPMENT AND TRAINING LIMITED	2	5	1
BOSCH AUTOMOTIVE SERVICE SOLUTIONS LTD	5	3	1
BPP ACTUARIAL EDUCATION LIMITED			1
CLARKSON EVANS TRAINING LIMITED			1
COGNITIA CONSULTING LIMITED			1
CONTRACTING SERVICES (EDUCATION AND SKILLS) LIMITED			1
CREATIVE SPORT & LEISURE LTD			1
DEVELOPMENT PROCESSES GROUP PLC			1
DOVE NEST MANAGEMENT TRAINING AND DEVELOPMENT		1	1
DUTTON FISHER ASSOCIATES LIMITED			1
E G S NATIONWIDE LIMITED			1
ESTIO TRAINING LIMITED			1
FITCH LEARNING LIMITED			1
FURTHER TRAINING LIMITED		1	1
FWD TRAINING & CONSULTANCY LIMITED		5	1
GREENLIGHT SAFETY CONSULTANCY LTD			1
HART LEARNING & DEVELOPMENT LTD			1
HTFT PARTNERSHIP LIMITED			1
I & F LIMITED		1	1
IN-COMM TRAINING AND BUSINESS SERVICES LIMITED		1	1
J G W TRAINING LIMITED			1
KEITS TRAINING SERVICES LTD	8	2	1
KEYSTONE TRAINING LTD		3	1
KPMG LLP		1	1
L.I.T.S. LIMITED			1
LEAN EDUCATION AND DEVELOPMENT LIMITED		12	1
LET ME PLAY LIMITED			1
LIGA (UK) LTD	1	1	1
MEADOWHALL TRAINING LIMITED	4		1
MEAT EAST ANGLIA TRADES (IPSWICH) LIMITED			1
MOSAIC SPA AND HEALTH CLUBS (CONTRACT		2	1
MYF TRAINING LIMITED			1

Provider	2016/17	2017/18	2018/19
PENSHAW VIEW TRAINING LIMITED			1
PETA LIMITED		3	1
PIPER TRAINING LIMITED		1	1
PIZZA HUT (U.K.) LIMITED	1		1
PRESIDENCY LONDON COLLEGE LIMITED			1
PREVISTA LTD	11	1	1
RICOH UK LIMITED		1	1
SALFORD AND TRAFFORD ENGINEERING GROUP TRAINING			1
SEYMOUR DAVIES LTD.		1	1
SKILLS TO GROUP LIMITED	1	1	1
SOLVO VIR LTD		2	1
SOUTHAMPTON ENGINEERING TRAINING ASSOCIATION	2	4	1
THATCHAM RESEARCH	4	1	1
THE ASSOCIATION OF HEALTH PROFESSIONS IN			1
THE GROWTH COMPANY LIMITED	6	1	1
THOMAS COOK UK LIMITED		1	1
TONI & GUY UK TRAINING LIMITED	6		1
TRAIN'D UP RAILWAY RESOURCING LIMITED			1
TRS TRAINING LIMITED		1	1
URBAN EDUCATION & TRAINING GROUP LIMITED			1
VH DOCTORS LIMITED		2	1
VIRGIN ATLANTIC AIRWAYS LIMITED			1
VISION EXPRESS (UK) LIMITED		1	1
VISTA TRAINING SOLUTIONS LIMITED			1
WEST BERKSHIRE TRAINING CONSORTIUM		1	1
WILTSHIRE TRANSPORT TRAINING & DEVELOPMENT LIMITED	4	2	1
A R C ACADEMY UK LIMITED		1	
APA PROCUREMENT TRAINING LIMITED		1	
ASTUTE MINDS LTD	2	1	
ATG TRAINING	2	1	
BIG CREATIVE TRAINING LTD		1	
BLUE ARROW LTD.	2	1	
BPP HOLDINGS LIMITED	42	1	
BRIGHT HORIZONS FAMILY SOLUTIONS LIMITED	1		
BRS EDUCATION LIMITED	1	3	
CARE FIRST TRAINING LIMITED		1	
CARE UK COMMUNITY PARTNERSHIPS LTD	10		
CARILLION CONSTRUCTION LIMITED	1		
CATCH 22 CHARITY LIMITED		3	
CITROEN U.K. LIMITED	3		
COMPASS GROUP, UK AND IRELAND LIMITED	5	1	
CONSORTIUM OF VOCATIONAL AND EDUCATIONAL	6	1	
DAWN HODGE ASSOCIATES LIMITED	9		
DEARING LIMITED		63	
E.J.MARKHAM & SON LIMITED		1	
EEF LIMITED	2	1	
ENTRUST SUPPORT SERVICES LIMITED		1	

Provider	2016/17	2017/18	2018/19
ESSENTIAL LEARNING COMPANY LIMITED		1	
FINMECCANICA UK LIMITED	10		
FIRST CITY TRAINING LIMITED	53	14	
FIRST4SKILLS LIMITED	21		
FLIGHT CENTRE (UK) LIMITED		3	
FLOORTRAIN (GB) LIMITED		1	
FOCUS TRAINING (SW) LIMITED	1		
GREEN INC (EU) LIMITED	2		
HAIR AND BEAUTY INDUSTRY TRAINING LIMITED	1		
HONDA MOTOR EUROPE LIMITED	2		
HSBC BANK PLC	6		
INGEUS TRAINING LIMITED	1		
INVISAGE LIMITED		3	
J & S BLACKHURST LIMITED	1	2	
JAGUAR LAND ROVER HOLDINGS LIMITED	2		
JOHN LAING TRAINING LIMITED		1	
KNOWLEDGEBRIEF LIMITED		1	
KWIK-FIT (GB) LIMITED	1	4	
LAWN TENNIS ASSOCIATION LIMITED	3	1	
LEARNDIRECT APPRENTICESHIPS LIMITED	42		
LEARNDIRECT LIMITED	451	53	
LEARNING CURVE GROUP LIMITED	1	2	
LEARNING SKILLS PARTNERSHIP LTD		1	
LRTT LIMITED		3	
MCDONALD'S RESTAURANTS LIMITED	5		
MERCEDES-BENZ CARS UK LIMITED	2	4	
MERCIA COLLEGE LIMITED		2	
MERCIA PARTNERSHIP (UK) LTD		2	
METSKILL LIMITED	2		
MICHAEL JOHN HEATH		1	
MICHAEL JOHN TRAINING LIMITED	7		
MOOR TRAINING LIMITED		1	
NATIONAL HORSERACING COLLEGE LIMITED	1		
NOTTINGHAMSHIRE TRAINING NETWORK LIMITED	1		
NSL LIMITED		1	
NUFFIELD HEALTH		1	
PDM TRAINING & CONSULTANCY LIMITED	13		
PEACOCKS STORES LIMITED		3	
POSITIVE OUTCOMES LTD	20		
PREMIER PEOPLE SOLUTIONS LIMITED		1	
QINETIQ LIMITED	3	1	
RAYTHEON SYSTEMS LIMITED	2	5	
REWARDS TRAINING RECRUITMENT CONSULTANCY LIMITED		1	
RIVERSIDE TRAINING LIMITED	3		
ROLLS-ROYCE PLC		3	
SAKS (EDUCATION) LIMITED	2	3	
SBC TRAINING LIMITED		1	

Provider	2016/17	2017/18	2018/19
SECURITAS SECURITY SERVICES (UK) LIMITED		4	
SIEMENS PUBLIC LIMITED COMPANY	5	4	
SKILLS FOR SECURITY LIMITED		1	
SOCIAL ENTERPRISE KENT CIC	1		
SOFTMIST LIMITED	2		
SOUTH WEST HIGHWAYS LIMITED		4	
SOUTH WEST REGIONAL ASSESSMENT CENTRE LIMITED	9	7	
STOCKPORT ENGINEERING TRAINING ASSOCIATION	1		
SUMMERHOUSE EQUESTRIAN AND TRAINING CENTRE LLP	4	1	
TALENT TRAINING (UK) LLP	87		
TDR TRAINING LIMITED	1		
THE COLLEGE OF ANIMAL WELFARE LIMITED	2	2	
THE INTRAINING GROUP LIMITED	36	5	
THE KNOWLEDGE ACADEMY LIMITED		3	
THE SIDE BY SIDE PARTNERSHIP LIMITED		1	
THE SKILLS PARTNERSHIP LIMITED	5	4	
THE TRAINING & RECRUITMENT PARTNERSHIP LIMITED	7	1	
THE VOCATIONAL COLLEGE LIMITED	25	1	
THOMAS COOK GROUP UK LIMITED	1		
TRAINSPEOPLE LIMITED		2	
VEOLIA ENVIRONNEMENT DEVELOPMENT CENTRE LIMITED		1	
WEBS TRAINING LIMITED	1		
WOLSELEY UK LIMITED	4		
WOODSPEEN TRAINING LIMITED	16		
YMCA TRAINING	3	1	
Sixth Form College	**4**	**8**	**7**
RICHARD HUISH COLLEGE	1	4	4
PORTSMOUTH COLLEGE			2
SHREWSBURY COLLEGES GROUP	1	1	1
ST VINCENT COLLEGE	2		
THE HENLEY COLLEGE		3	
Special Colleges	**251**	**217**	**175**
KINGSTON MAURWARD COLLEGE	219	179	158
SPARSHOLT COLLEGE	11	20	12
MYERSCOUGH COLLEGE	19	16	5
BROOKSBY MELTON COLLEGE		1	
HARTPURY COLLEGE	1		
REASEHEATH COLLEGE	1	1	

PEOPLE AND SKILLS
RESEARCH

In support of the Dorset Skills Advirasry Panel and Board

WWW.DORSETLEP.CO.UK