

# ***Regional Profiles of the Workforce by Ethnicity and Migrant Workers***

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## **London**

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## Executive Summary

The aim of this project is to provide a succinct analysis of changing patterns of employment by ethnic groups and for migrants. The objective is to provide a set of national and regional profiles of employment patterns, focussing upon gender, age and ethnic group, including variations across occupation and sector dimensions (as far as the data will allow). This is one of 9 *Regional Profiles*. The profiles are complemented by a *National Report*, which provides an overview and some cross-regional comparisons, and a more detailed *Technical Report*, which describes sources and methods. A key objective is to provide consistent and comparable data by region to help users to identify how they sit in the broader national picture.

The prime audience is high level policy makers and administrators within the LSC although the intention is to provide reports which will be of interest and value to a broader audience, including the Sector Skills development Agency (SSDA), Sector Skills Councils (SSCs) and other employer bodies, Regional Development Agencies (RDAs), the Department for Education and Skills (DfES), etc.

It is important to recognise that there are a number of conceptual and practical problems in defining and measuring ethnicity and migrants. These issues are discussed in detail in the *National Report*. They include the small sample sizes in many of the surveys which make obtaining robust estimates difficult. Originally, it had been hoped to present some benchmark projections by ethnic group. However, it has become clear in the course of the project that this is not feasible without a complete and robust demographic model of changing ethnic patterns. Such work is currently underway within ONS which will facilitate such projections in due course.

The results presented use a variety of sources and methods. The main sources of data are the LFS, Census of Population and *Working Futures* (including some new more detailed demographic and labour supply projections – excluding ethnicity). A standard set of “profiles” is therefore developed for each region and the whole of England. These present information in a consistent and comparable format, enabling direct comparisons to be made. These profiles are primarily in the form of a standard set of tables and charts, with only limited text. The latter is confined to a few bullet points highlighting key features.

The key findings to emerge for London are:

- Ethnic minorities accounted for 27% of employment in London in 2004, compared with 17% in 1994.
- The largest single ethnic group is people of Indian origin, accounting for almost 7% of total employment in 2004.
- Ethnic groups account for a much larger share of employment in the London than in England as a whole.
- In London, ethnic minorities are over-represented in several occupations with relatively low skills requirements, including elementary occupations, machine & transport operatives and (especially) sales & customer service occupations.
- By contrast, they are under-represented in managerial occupations.

- There are important variations in occupational profiles between ethnic minority groups. For example, the mixed parentage group has a larger than average share of workers in associate professional occupations.
- Ethnic minority groups are more concentrated in service industries than White people, especially in distribution, hotels & catering and transport. They are under-represented in other business services and miscellaneous services.
- Non-marketed services, especially health & social work, are a particularly important employer for Black, mixed parentage and the “Other ethnic group” category.
- Changes in the occupational and industrial profile of *employment* have been dominated by changes in the ethnic profile of the *workforce* and the *population*. By contrast, changes in occupational or industrial structure have played only a minor role in the changing profile of employment by ethnic group.
- In 2004, a third of workers in London had been born outside the UK.
- The single largest group of migrants are those aged 35-44 years.
- The share of migrant workers in employment is greatest in the hotels & catering and health & social work industries.
- The percentage of migrant workers was highest in elementary and personal service occupations in 2004. They are least likely to work in associate professional & technical and administrative & secretarial occupations.
- There are very large differences in London between residence/heads estimates of employment and workplace/jobs estimates as used in *Working Futures*. In general these differences reflect factors such as double jobbing. In the UK as a whole the number of people employed is around 28 million while the number of jobs is around 30 million. In particular geographical areas such differences can be compounded by commuting patterns. London is a classic example of this. A significant part of the difference between LFS estimates of numbers of people in employment (around 3¼ million) and the Working Futures estimate of total workplace jobs (around 4½ million) is due to net inward commuting flows.

## 1. Introduction

This report is one of a set of 9 presenting a standard set of *Regional Profiles* for each of the English regions, focussing on general labour market trends but with a special emphasis on issues relating to ethnicity and migrants. Further details of the background to the project data sources and methods are given in Annex A. The data are presented in a common set of tables and charts with brief commentary.

A common structure is adopted for all the *Regional Profiles*:

1. *Structure of Employment by Ethnic Group:* A brief overview of employment (jobs), by industry and occupation, by ethnic group.
2. *Shift-share Analysis of Employment Change by Ethnic Group:*  
This covers the historical period 1994-2004. It is based on LFS data but scaled so as to be consistent with information from *Working Futures 2004-2014*.<sup>1</sup>
3. *Migrants:*  
Migrants are defined as workers born outside the UK. The tables on migrant workers are based on Labour Force Survey data for 1994 and 2004. A summary of the limited data available is presented, including breaks by age and deployment by industry and occupation.
4. *Key Structural Features of the Labour Market:*  
Brief summary of the key features of general employment patterns in the geographical area concerned, focussing upon historical patterns and projected future changes by:
  - gender & status;
  - sector; and
  - occupation.
5. *Demographic structure*  
Profiles of population and the workforce by age and gender, in the form of tables and charts presenting a detailed analysis of current and projected future patterns by age and gender.

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<sup>1</sup> *Working Futures 2004-2014* comprises the most detailed and comprehensive analysis of historical and projected future trends in employment structure ever published in the UK. Details can be found in Wilson *et al.* (2005).

## 2. Regional Profile

### 2.1 Structure of Employment by Ethnic Group

The estimates in Sections 2.1 and 2.2 are based on a combination of data from the Labour Force Survey (LFS) and *Working Futures 2004-2014*. The latter represents the most comprehensive and consistent set of employment estimates and projections available for the UK, providing detailed breaks by sector and geographical area as well as occupation, gender and employment status. It does not, however, include anything on ethnicity. The present report combines the *Working Futures* data with information on the ethnic structure of employment from the LFS to provide a consistent picture. The *Working Futures* employment data are on a workplace (jobs) basis. The data on ethnicity from the LFS are on a residence (heads) basis. The present results assume that the same patterns of ethnicity apply on workplace and residence bases. In London these two measures differ substantially due to both double jobbing and net inward commuting. The LFS estimate of numbers of people in employment (residents/heads) in 2004 is 3,228 thousand, while the *Working Futures* estimate of workplace jobs is 4,496 thousand. The profiles also include (in Section 2.3) information on migrants based solely on LFS data.

The overall pattern of employment by ethnicity in London is summarised in Table 2.1. Together with Figure 2.1, this provides an overview of the patterns of ethnic employment in the region. The first panel of the figure shows the significance of ethnic minority employment in the region. Comparable information is also shown for Great Britain as a whole. The other two panels illustrate how these patterns are changing. The bottom left panel shows the absolute changes in employment over the next decade, while the bottom right panel illustrates how this compares in terms of percentage growth rates with the position in the whole of Great Britain.

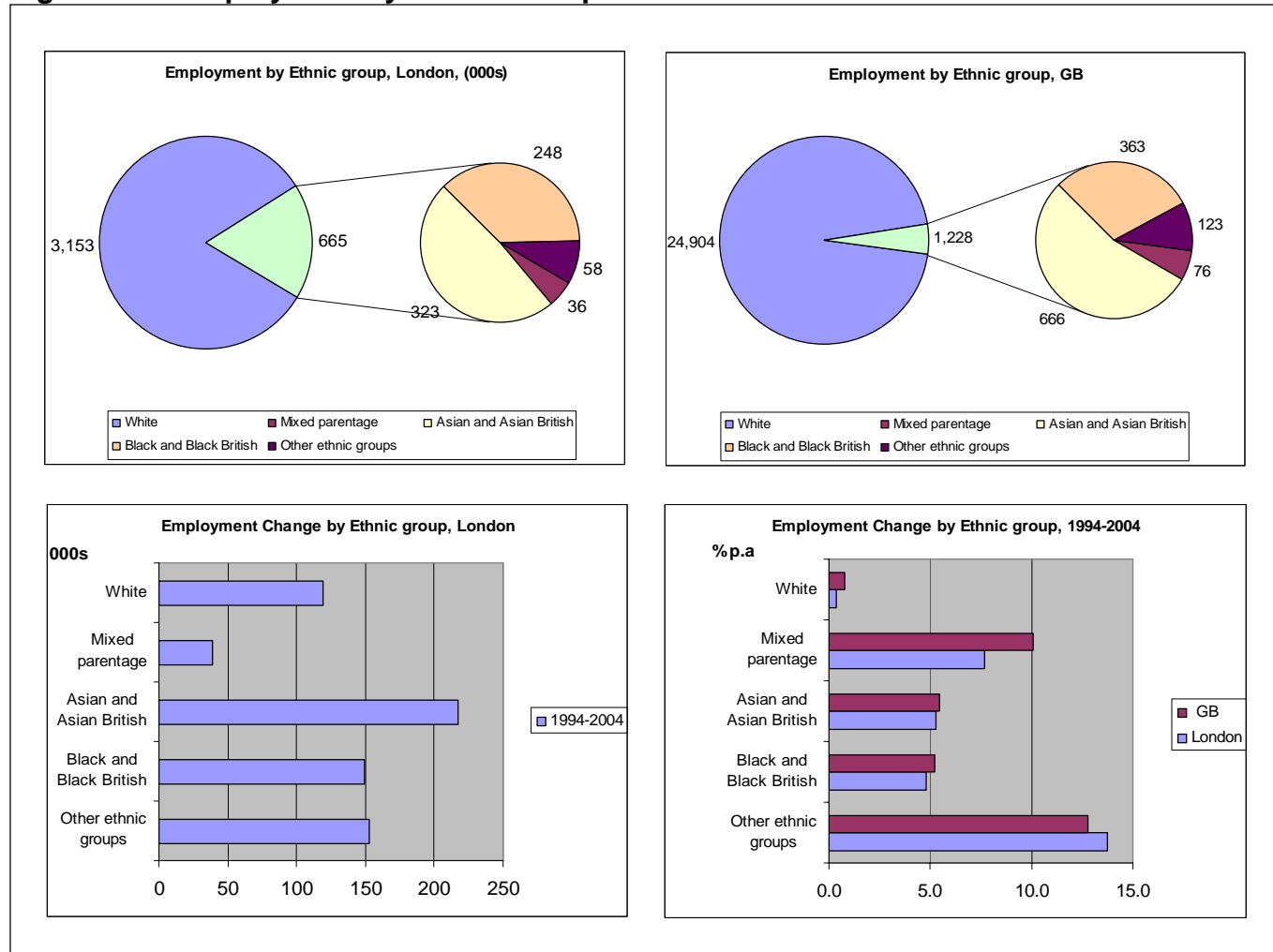
**Table 2.1: Workplace Employment (Jobs) by Ethnic Group, London, (000s)**

| Ethnic group                   | 1994         |                   |               | 2004         |                   |               |
|--------------------------------|--------------|-------------------|---------------|--------------|-------------------|---------------|
|                                | 000s         | London<br>% share | GB<br>% share | 000s         | London<br>% share | GB<br>% share |
| White                          | 3,153        | 82.6              | 95.3          | 3,273        | 72.8              | 92.0          |
| <i>All ethnic minorities</i>   | 665          | 17.4              | 4.7           | 1,223        | 27.2              | 8.0           |
| Mixed parentage                | 36           | 0.9               | 0.3           | 75           | 1.7               | 0.7           |
| <i>Asian and Asian British</i> | 323          | 8.5               | 2.5           | 540          | 12.0              | 3.9           |
| Indian                         | 208          | 5.5               | 1.6           | 302          | 6.7               | 2.0           |
| Pakistani                      | 37           | 1.0               | 0.5           | 72           | 1.6               | 0.9           |
| Bangladeshi                    | 24           | 0.6               | 0.1           | 61           | 1.4               | 0.3           |
| Other Asian                    | 54           | 1.4               | 0.3           | 105          | 2.3               | 0.6           |
| <i>Black and Black British</i> | 248          | 6.5               | 1.4           | 397          | 8.8               | 2.1           |
| <i>Black-Caribbean</i>         | 147          | 3.8               | 0.9           | 190          | 4.2               | 1.0           |
| Black-African                  | 80           | 2.1               | 0.4           | 192          | 4.3               | 1.0           |
| Black-Other                    | 21           | 0.6               | 0.1           | 15           | 0.3               | 0.1           |
| <i>Other ethnic groups</i>     | 58           | 1.5               | 0.5           | 212          | 4.7               | 1.4           |
| Chinese                        | 30           | 0.8               | 0.3           | 53           | 1.2               | 0.4           |
| Other                          | 29           | 0.8               | 0.2           | 158          | 3.5               | 1.0           |
| <i>Total</i>                   | <i>3,818</i> | <i>100.0</i>      | <i>100.0</i>  | <i>4,496</i> | <i>100.0</i>      | <i>100.0</i>  |

Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative.

**Figure 2.1: Employment by Ethnic Group**



Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative.

**Table 2.2: Occupational Employment by Ethnic Group, 2004**

| London                                 | All          |              | White        |              | All Ethnic Minorities |              | Mixed     |              | Asian      |              | Black      |              | Other      |              |
|--|--------------|--------------|--------------|--------------|-----------------------|--------------|-----------|--------------|------------|--------------|------------|--------------|------------|--------------|
|  | 000s         | %            | 000s         | %            | 000s                  | %            | 000s      | %            | 000s       | %            | 000s       | %            | 000s       | %            |
| <b>Occupations</b>                     |              |              |              |              |                       |              |           |              |            |              |            |              |            |              |
| Managers and Senior Officials          | 576          | 17.8         | 460          | 19.6         | 115                   | 13.1         | 6         | 11.8         | 62         | 16.0         | 23         | 8.0          | 24         | 15.7         |
| Professional occupations               | 526          | 16.3         | 400          | 17.0         | 126                   | 14.3         | 8         | 15.9         | 61         | 15.7         | 34         | 12.0         | 22         | 14.7         |
| Associate Professional and Technical   | 585          | 18.1         | 457          | 19.5         | 127                   | 14.5         | 14        | 26.9         | 46         | 11.9         | 45         | 15.8         | 22         | 14.3         |
| Administrative and Secretarial         | 424          | 13.1         | 309          | 13.1         | 115                   | 13.1         | 7         | 13.8         | 54         | 14.0         | 39         | 13.8         | 14         | 9.3          |
| Skilled Trades Occupations             | 277          | 8.6          | 209          | 8.9          | 68                    | 7.8          | 3         | 6.2          | 27         | 7.0          | 22         | 7.8          | 16         | 10.4         |
| Personal Service Occupations           | 203          | 6.3          | 142          | 6.0          | 62                    | 7.0          | 2         | 4.0          | 19         | 5.0          | 30         | 10.6         | 10         | 6.6          |
| Sales and Customer Service Occupations | 201          | 6.2          | 101          | 4.3          | 99                    | 11.3         | 6         | 10.6         | 51         | 13.2         | 26         | 9.0          | 17         | 10.9         |
| Machine and Transport Operatives       | 151          | 4.7          | 101          | 4.3          | 51                    | 5.8          | 2         | 3.5          | 23         | 5.9          | 17         | 6.0          | 9          | 6.0          |
| Elementary Occupations                 | 286          | 8.9          | 171          | 7.3          | 115                   | 13.1         | 4         | 7.3          | 44         | 11.4         | 48         | 17.1         | 18         | 12.1         |
| <b>Total</b>                           | <b>3,228</b> | <b>100.0</b> | <b>2,350</b> | <b>100.0</b> | <b>878</b>            | <b>100.0</b> | <b>53</b> | <b>100.0</b> | <b>389</b> | <b>100.0</b> | <b>284</b> | <b>100.0</b> | <b>152</b> | <b>100.0</b> |

Source: IER estimates based on analysis of LFS, etc.

Note: Estimates are numbers of people (residents/heads). Any estimates below 6000 should be regarded as unreliable.

**Table 2.3: Industrial Employment by Ethnic Group, 2004**

| London                         | All          |              | White        |              | All Ethnic Minorities |              | Mixed     |              | Asian      |              | Black      |              | Other      |              |
|--------------------------------|--------------|--------------|--------------|--------------|-----------------------|--------------|-----------|--------------|------------|--------------|------------|--------------|------------|--------------|
|                                | 000s         | %            | 000s         | %            | 000s                  | %            | 000s      | %            | 000s       | %            | 000s       | %            | 000s       | %            |
| <b>Sector</b>                  |              |              |              |              |                       |              |           |              |            |              |            |              |            |              |
| Agriculture etc                | 8            | 0.2          | 7            | 0.3          | 0                     | 0.0          | 0         | 0.0          | 0          | 0.1          | 0          | 0.0          | 0          | 0.0          |
| Mining & quarrying             | 3            | 0.1          | 2            | 0.1          | 1                     | 0.1          | 0         | 0.0          | 1          | 0.3          | 0          | 0.0          | 0          | 0.0          |
| Food, drink & tobacco          | 15           | 0.5          | 10           | 0.4          | 5                     | 0.6          | 0         | 0.0          | 3          | 0.7          | 1          | 0.4          | 1          | 0.7          |
| Engineering                    | 51           | 1.6          | 35           | 1.5          | 15                    | 1.8          | 0         | 0.7          | 10         | 2.5          | 1          | 0.4          | 4          | 2.8          |
| Rest of manufacturing          | 161          | 5.0          | 129          | 5.5          | 33                    | 3.7          | 4         | 6.8          | 17         | 4.4          | 8          | 2.9          | 4          | 2.5          |
| Electricity, gas & water       | 9            | 0.3          | 7            | 0.3          | 2                     | 0.2          | 1         | 1.4          | 1          | 0.3          | 0          | 0.0          | 0          | 0.0          |
| Construction                   | 217          | 6.7          | 186          | 7.9          | 31                    | 3.5          | 1         | 1.4          | 14         | 3.5          | 11         | 3.7          | 5          | 3.6          |
| Distribution                   | 429          | 13.3         | 261          | 11.1         | 167                   | 19.1         | 9         | 17.7         | 93         | 23.9         | 43         | 15.2         | 22         | 14.6         |
| Hotels and catering            | 151          | 4.7          | 80           | 3.4          | 71                    | 8.1          | 2         | 3.9          | 35         | 8.9          | 14         | 4.9          | 20         | 13.2         |
| Transport & telecommunications | 258          | 8.0          | 178          | 7.6          | 80                    | 9.1          | 3         | 6.2          | 36         | 9.2          | 28         | 9.9          | 13         | 8.5          |
| Banking & insurance            | 231          | 7.2          | 186          | 7.9          | 45                    | 5.1          | 4         | 6.9          | 25         | 6.3          | 9          | 3.1          | 8          | 5.4          |
| Other business services        | 581          | 18.0         | 443          | 18.9         | 138                   | 15.8         | 10        | 18.0         | 55         | 14.2         | 47         | 16.5         | 27         | 17.8         |
| Public admin and defence       | 223          | 6.9          | 154          | 6.6          | 69                    | 7.9          | 4         | 7.5          | 29         | 7.5          | 27         | 9.6          | 9          | 5.7          |
| Education                      | 271          | 8.4          | 215          | 9.1          | 56                    | 6.3          | 6         | 11.0         | 21         | 5.3          | 23         | 8.1          | 6          | 4.2          |
| Health and social work         | 343          | 10.6         | 229          | 9.7          | 114                   | 13.0         | 7         | 12.9         | 34         | 8.8          | 54         | 19.0         | 19         | 12.5         |
| Miscellaneous services         | 274          | 8.5          | 225          | 9.6          | 49                    | 5.6          | 3         | 5.6          | 16         | 4.0          | 18         | 6.2          | 13         | 8.5          |
| <b>Total</b>                   | <b>3,225</b> | <b>100.0</b> | <b>2,349</b> | <b>100.0</b> | <b>877</b>            | <b>100.0</b> | <b>53</b> | <b>100.0</b> | <b>389</b> | <b>100.0</b> | <b>283</b> | <b>100.0</b> | <b>152</b> | <b>100.0</b> |

Source: IER estimates based on analysis of LFS, etc.

Note: Estimates are numbers of people (residents/heads). Any estimates below 6000 should be regarded as unreliable.

On average, in Great Britain as a whole around 8% of all jobs are filled by people from ethnic minorities. The share in London was 27% in 2004, more than three times the national average and up from 17.4% in 1994.

The largest single ethnic minority group is people of Asian and Asian British origin, accounting for 6.7% of total employment in 2004.

All ethnic minority groups account for a greater share of employment in London than nationally, underlining the far greater concentration of ethnic minority groups in London than in any other region.

Table 2.2 and Figure 2.2 illustrate how patterns of ethnicity vary across occupations. In London ethnic minorities are over-represented in several occupations with relatively low skills requirements, including elementary occupations, machine & transport operatives, sales & customer service occupations and personal service occupations.

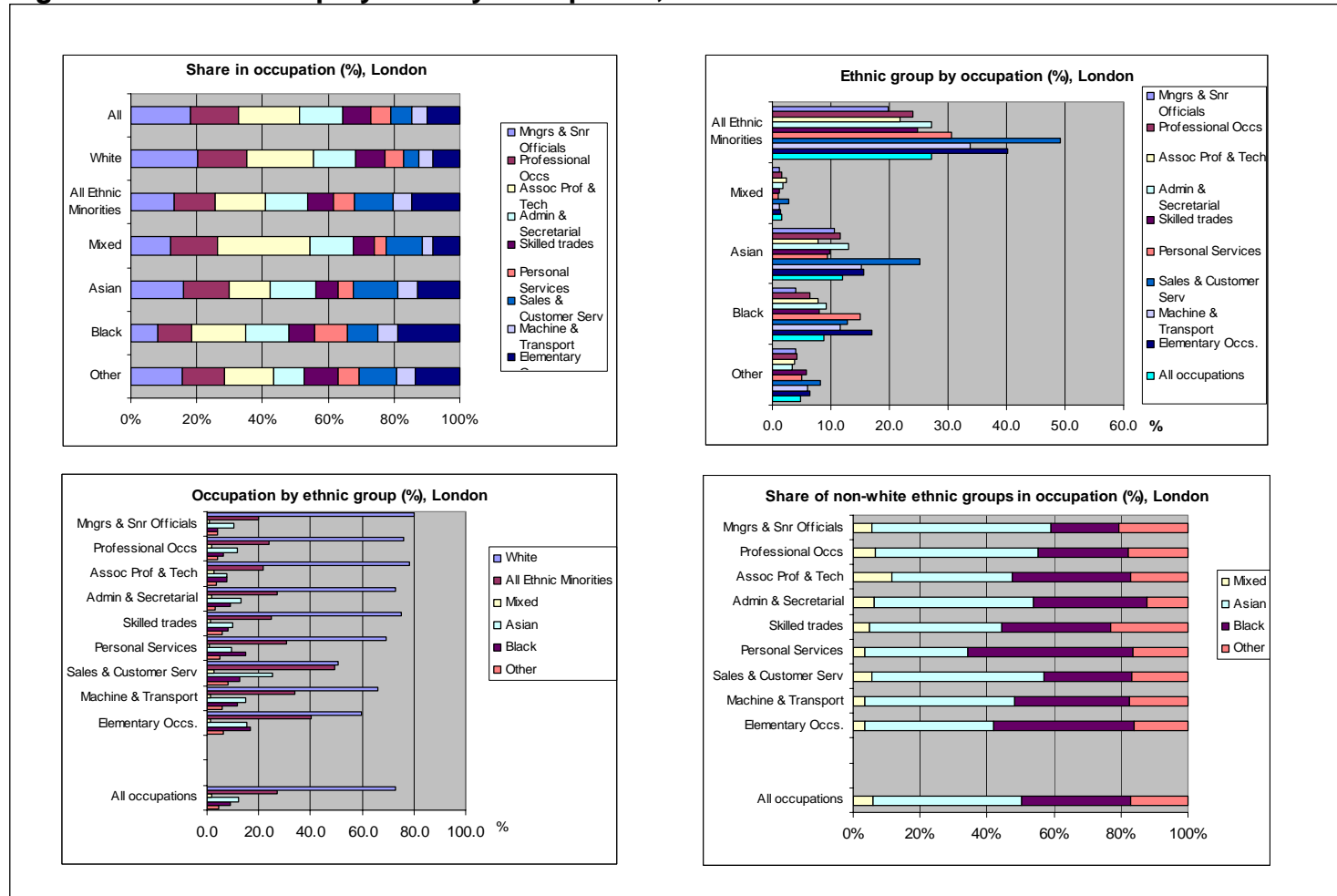
By contrast, they are under-represented in managerial, professional and associate professional & technical occupations with higher level skill requirements, and to a lesser extent in skilled manual occupations.

Figure 2.3 and Table 2.3 present a similar analysis, but this time focussing upon industries.

Ethnic minorities are significantly under-represented in industries such as agriculture and construction and to a lesser extent in engineering and public administration & defence.

In contrast they take up a more than proportionate share of the jobs in food, drink & tobacco, transport & communications and electricity, gas & water and health & social work.

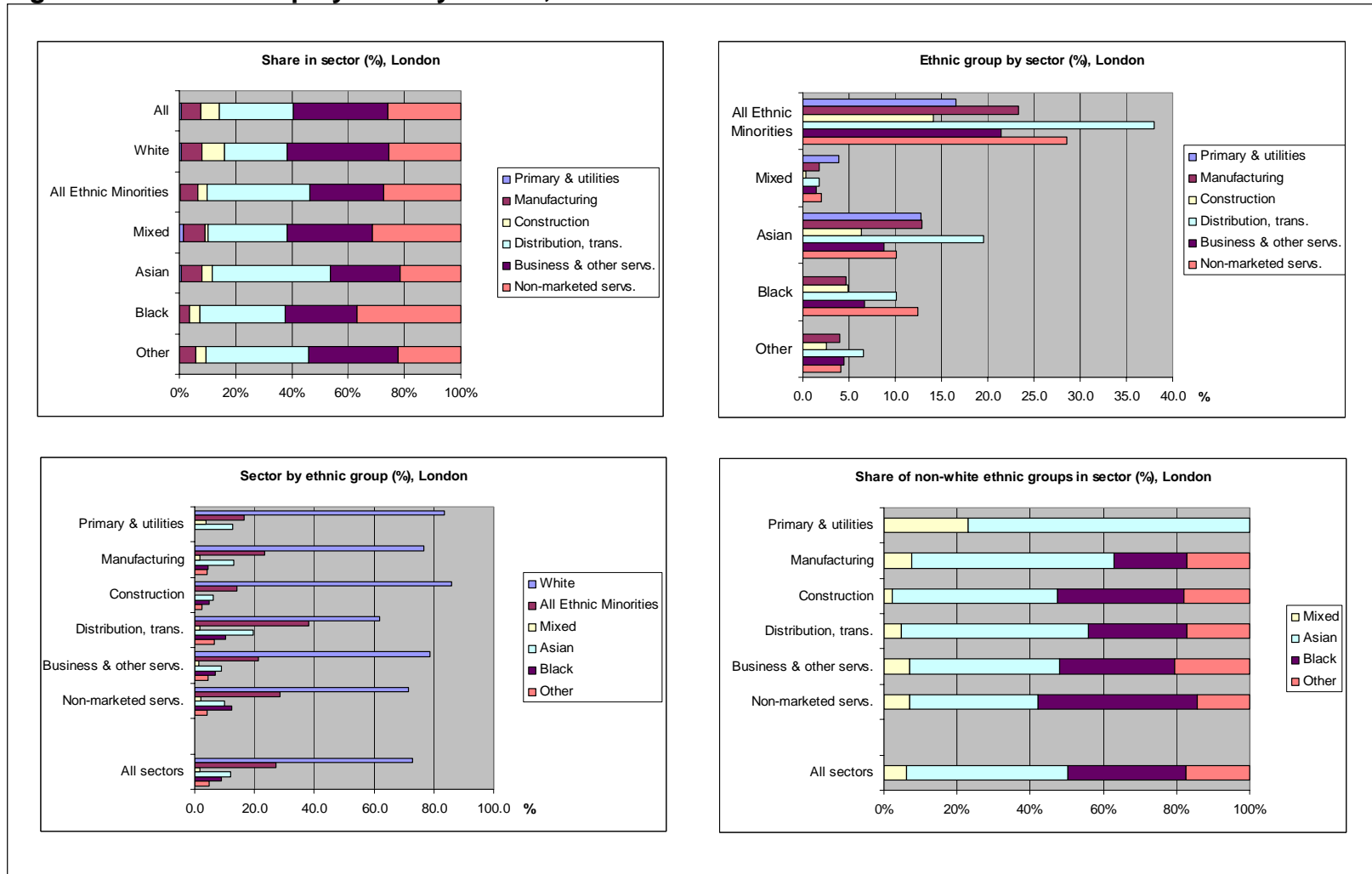
**Figure 2.2: Ethnic Employment by Occupation, 2004**



Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative.

**Figure 2.3: Ethnic Employment by Sector, 2004**



Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative.

## 2.2 *Shift Share Analysis of Employment Change by Ethnic Group*

Historical changes in employment by ethnic group cross-classified by industry and by occupation are illustrated in Tables 2.4 and 2.5. These changes can be analysed using shift share techniques in order to assess the extent to which different ethnic groups have benefited or suffered from structural shifts in employment.

The shift share analysis separates the total change into three parts:

- a scale effect – what would have happened if employment in all groups and categories had grown (or declined) in line with the total;
- an industry (or occupational) effect which shows how particular groups have benefited because of structural changes (assuming the share of employment by ethnic group remains as in the base year);
- an ethnicity effect - the residual.

The industry analysis is shown in Table 2.4 while the occupational analysis is presented in Table 2.5. In both cases the change in employment by ethnic group is dominated by the ethnicity effect. By contrast, the industry or occupational effect is trivial.

The implication is that it is supply side pressures (the growth of the population and labour supply) from different ethnic groups that dominate changing employment patterns by ethnic group, rather than a demand side structural shift.

This means that in order to make robust projections of employment by ethnic group it is essential to have good demographic models. Such work is ongoing within ONS.

Once these results are available it will be possible to extend this historical analysis and produce indicative projections.

As in England as a whole, the shift share analysis suggests that ethnicity effects predominate. Neither industry nor occupational effects are significant. Changing patterns of ethnic employment have been driven by the ethnicity effect. This in turn is a reflection of the large increases in the supply of people in these categories who have found employment in most parts of the economy.

**Table 2.4: Employment Change by Ethnic Group (London)**

| Ethnic group                   | 000s         | % share      | 000s         | % share      |
|--------------------------------|--------------|--------------|--------------|--------------|
|                                | 1994         |              | 2004         |              |
| White                          | 3,148        | 82.5         | 3,269        | 72.7         |
| <i>All ethnic minorities</i>   | 670          | 17.5         | 1,227        | 27.3         |
| Mixed parentage                | 37           | 1.0          | 74           | 1.7          |
| <i>Asian and Asian British</i> | 323          | 8.5          | 541          | 12.0         |
| Indian                         | 208          | 5.5          | 303          | 6.7          |
| Pakistani                      | 37           | 1.0          | 73           | 1.6          |
| Bangladeshi                    | 25           | 0.7          | 61           | 1.3          |
| Other Asian                    | 53           | 1.4          | 104          | 2.3          |
| <i>Black and Black British</i> | 251          | 6.6          | 400          | 8.9          |
| <i>Black-Caribbean</i>         | 148          | 3.9          | 190          | 4.2          |
| Black-African                  | 82           | 2.1          | 195          | 4.3          |
| Black-Other                    | 21           | 0.6          | 15           | 0.3          |
| <i>Other ethnic groups</i>     | 59           | 1.5          | 212          | 4.7          |
| Chinese                        | 30           | 0.8          | 53           | 1.2          |
| Other                          | 29           | 0.8          | 159          | 3.5          |
| <i>Total</i>                   | <i>3,818</i> | <i>100.0</i> | <i>4,496</i> | <i>100.0</i> |

Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative.

**Table 2.5: Employment Change Ethnic group (London)**

| Ethnic group                   | 000s                   | % p.a.      | 000s            | %                | 000s       | %            | 000s       | %           |
|--------------------------------|------------------------|-------------|-----------------|------------------|------------|--------------|------------|-------------|
|                                | Total change 1994-2004 |             | Industry effect | Ethnicity effect |            | Scale effect |            |             |
| White                          | 121                    | 0.4         | 1               | 0.0              | -439       | -14.0        | 559        | 17.8        |
| <i>All ethnic minorities</i>   | <i>557</i>             | <i>6.2</i>  | <i>-1</i>       | <i>-0.2</i>      | <i>439</i> | <i>65.6</i>  | <i>119</i> | <i>17.8</i> |
| Mixed parentage                | 37                     | 7.2         | 0               | -1.1             | 31         | 83.1         | 7          | 17.8        |
| <i>Asian and Asian British</i> | <i>218</i>             | <i>5.3</i>  | <i>1</i>        | <i>0.2</i>       | <i>160</i> | <i>49.4</i>  | <i>57</i>  | <i>17.8</i> |
| Indian                         | 95                     | 3.8         | 0               | 0.0              | 58         | 27.8         | 37         | 17.8        |
| Pakistani                      | 36                     | 7.1         | 0               | 0.9              | 29         | 80.5         | 7          | 17.8        |
| Bangladeshi                    | 36                     | 9.2         | 0               | 1.6              | 31         | 122.1        | 4          | 17.8        |
| Other Asian                    | 51                     | 7.0         | 0               | -0.3             | 42         | 78.6         | 9          | 17.8        |
| <i>Black and Black British</i> | <i>149</i>             | <i>4.8</i>  | <i>-2</i>       | <i>-0.7</i>      | <i>106</i> | <i>42.5</i>  | <i>45</i>  | <i>17.8</i> |
| <i>Black-Caribbean</i>         | <i>43</i>              | <i>2.6</i>  | <i>-1</i>       | <i>-0.9</i>      | <i>18</i>  | <i>12.0</i>  | <i>26</i>  | <i>17.8</i> |
| Black-African                  | 113                    | 9.1         | 0               | -0.4             | 99         | 121.2        | 14         | 17.8        |
| Black-Other                    | -6                     | -3.4        | 0               | -0.2             | -10        | -47.0        | 4          | 17.8        |
| <i>Other ethnic groups</i>     | <i>153</i>             | <i>13.7</i> | <i>0</i>        | <i>0.7</i>       | <i>142</i> | <i>242.1</i> | <i>10</i>  | <i>17.8</i> |
| Chinese                        | 23                     | 5.9         | 0               | 0.5              | 18         | 59.2         | 5          | 17.8        |
| Other                          | 130                    | 18.6        | 0               | 0.9              | 125        | 431.1        | 5          | 17.8        |
| <i>Total</i>                   | <i>678</i>             | <i>1.6</i>  | <i>0</i>        | <i>0.0</i>       | <i>0</i>   | <i>0.0</i>   | <i>678</i> | <i>17.8</i> |

Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative. b) The change in Black-Other may reflect the change in ethnic group classification between 1994 and 2004 which resulted in many Black-Other people being re-classified to the mixed parentage ethnic group.

**Table 2.6: Employment Change by Ethnic Group (London)**

| Ethnic group                   | 000s                   | % p.a.      | 000s              | %           | 000s             | %            | 000s         | %           |
|--------------------------------|------------------------|-------------|-------------------|-------------|------------------|--------------|--------------|-------------|
|                                | Total change 1994-2004 |             | Occupation effect |             | Ethnicity effect |              | Scale effect |             |
| White                          | 119                    | 0.4         | 1                 | 0.0         | -442             | -14.0        | 560          | 17.8        |
| <i>All ethnic minorities</i>   | <i>559</i>             | <i>6.3</i>  | <i>-1</i>         | <i>-0.1</i> | <i>442</i>       | <i>66.4</i>  | <i>118</i>   | <i>17.8</i> |
| Mixed parentage                | 39                     | 7.7         | 0                 | -1.1        | 33               | 92.5         | 6            | 17.8        |
| <i>Asian and Asian British</i> | <i>217</i>             | <i>5.3</i>  | <i>1</i>          | <i>0.2</i>  | <i>159</i>       | <i>49.3</i>  | <i>57</i>    | <i>17.8</i> |
| Indian                         | 94                     | 3.8         | 0                 | 0.0         | 57               | 27.3         | 37           | 17.8        |
| Pakistani                      | 36                     | 7.0         | 0                 | 0.9         | 29               | 78.9         | 6            | 17.8        |
| Bangladeshi                    | 37                     | 9.6         | 0                 | 1.9         | 32               | 130.0        | 4            | 17.8        |
| Other Asian                    | 51                     | 6.9         | 0                 | -0.3        | 42               | 78.0         | 10           | 17.8        |
| <i>Black and Black British</i> | <i>149</i>             | <i>4.8</i>  | <i>-2</i>         | <i>-0.7</i> | <i>107</i>       | <i>43.2</i>  | <i>44</i>    | <i>17.8</i> |
| <i>Black-Caribbean</i>         | <i>43</i>              | <i>2.6</i>  | <i>-1</i>         | <i>-0.8</i> | <i>19</i>        | <i>12.7</i>  | <i>26</i>    | <i>17.8</i> |
| Black-African                  | 112                    | 9.1         | 0                 | -0.5        | 98               | 122.7        | 14           | 17.8        |
| Black-Other                    | -6                     | -3.3        | 0                 | -0.3        | -10              | -45.8        | 4            | 17.8        |
| <i>Other ethnic groups</i>     | <i>153</i>             | <i>13.7</i> | <i>0</i>          | <i>0.7</i>  | <i>142</i>       | <i>243.6</i> | <i>10</i>    | <i>17.8</i> |
| Chinese                        | 23                     | 6.0         | 0                 | 0.5         | 18               | 60.8         | 5            | 17.8        |
| Other                          | 130                    | 18.6        | 0                 | 0.9         | 124              | 432.3        | 5            | 17.8        |
| <i>Total</i>                   | <i>678</i>             | <i>1.6</i>  | <i>0</i>          | <i>0.0</i>  | <i>0</i>         | <i>0.0</i>   | <i>678</i>   | <i>17.8</i> |

Source: IER estimates based on LFS data and information from *Working Futures 2004-2014*.

Notes: a) The LFS data are in terms of numbers of people (residents/heads). Shares are applied to *Working Futures* estimates of workplace employment (jobs). The estimates in this table are in therefore terms of numbers of jobs. Estimates based on numbers below 1,000 should be discounted as insignificant. Estimates based on numbers below 6,000 should be regarded as indicative. b) The change in Black-Other may reflect the change in ethnic group classification between 1994 and 2004 which resulted in many Black-Other people being re-classified to the mixed parentage ethnic group.

## 2.3 Migrants

In the following tables, migrant workers are defined as people in work (employed or self-employed), who were born outside the United Kingdom. Three categories of people born outside the UK are distinguished: those born in the rest of the 15-member EU; those born in the 10 “accession countries” which joined the EU in 2004 and those born elsewhere in the world. In most tables, percentages of males and females who are migrants are presented. The source for these tables is the quarterly Labour Force Survey. Due to the high degree of sampling error associated with small numbers derived from a sample survey, percentages based on fewer than 6 thousand individuals are suppressed in these tables (and replaced by the symbol “-”).

### a) Age group

The percentage of migrant workers in the workforce is far higher in London than in the other regions of England. There was also a large increase in the percentage of migrant workers between 1994 and 2004 (Table 2.7); from 21.7 % of males in 1994 to 32.8 % in 2004, and from 22.4 % in 1994 to 31.4 % in 2004 for females. This increase was most rapid for people aged 25-34, in which the percentage of foreign-born workers almost doubled. The percentage of foreign-born workers increased most slowly for 16-24 year olds, and was much smaller for this age group than for all other age groups by 2004.

In Table 2.8 the percentages of workers from the UK and the three regions of the world described above in 1994 is presented. Overall, 17.8 % of men and 17.6 % of women in work had been born outside EU25, while 2.9 % of men and 3.7 % of women had been born in the other EU15 countries. For both men and women, migrant workers were most common in the 35-44 age group, followed by 45-59 year olds and least common for 16-24 year olds.

By 2004, migrants from the rest of the EU15 formed 4.3 % of male workers and 4.4 % of female workers and those from the 10 accession countries represented 2.3 % of men and 2.4 % of women (Table 2.9). More than a quarter of both men and women in work had been born outside the EU. The age profile of migrant workers became more youthful by 2004, with the percentage of migrants in the workforce highest for 25-34 year olds, followed by 35-44 year olds, and lowest for 16-24 year olds.

### b) Industry

Table 2.10 presents change in the percentage of workers born in the UK and each region of the world between 1994 and 2004 by industry. For men, migrant workers accounted for 57.8 % of those working in hotels & catering, two-fifths of food, drink and tobacco employment, a third of those working in health & social work and a quarter of those working in distribution in 1994. For females, the percentage of migrant workers was highest in hotels & catering (40.5 per cent), engineering (36.9 per cent), health & social work (26.2 per cent) and rest of manufacturing (25.2 per cent).

By 2004, the percentage of foreign-born workers had increased for both men and women. For men, 70.3 % of those working in hotels & catering were migrants and more than half of those working in food, drink and tobacco were migrants. There were substantial increases in engineering, construction and most service sector industries. Among women, more than half of those working in engineering and hotels & catering and more than a third of those working in health & social work, distribution, transport and communications and rest of manufacturing were foreign-born. The increase was fastest in engineering.

In 1994, only 2.8 % of males and 3.7 % of females in work had been born in other EU15 countries, only 1.2 % had been born in the 10 accession countries and nearly all non-UK born workers had origins outside Europe (Table 2.11). By 2004 the percentage of workers born in the EU15 had increased to 4.3 % for males and 4.4 % for females, with 2.3 % of males and 2.4 % of females born in the 10 accession countries (Table 2.12). In 1994, hotels & catering were the main source of employment for people born in the EU15; 14.7 of male employees and 10.8 % of female employees. Those born in the rest of the world were most common in this industry and health & social work. In 2004, EU15 people were represented in a wider range of industries, but formed a smaller percentage of total employment. Their largest shares of employment were in hotels & catering and banking and insurance. Men from the 10 accession countries were most common in construction (9 % of employees), while women from these countries accounted for 4.9 % of employees in miscellaneous services.

#### c) Occupation

In 2004, the percentage of workers born outside the UK was highest for elementary occupations, followed by personal service occupations and process, plant & machinery operatives (semi-skilled manual workers; Table 2.13). The percentage UK-born was highest for administrative and secretarial and associate professional and technical occupations. The percentages born in Europe were highest for managers and senior officials and professional occupations. Those born in the 10 accession countries formed 6.8 % of skilled trades, 5.5 % of those in elementary occupations and 4 % of those in personal service occupations.

#### d) Ethnic group

In 2004, a third of all workers but only 18.3 % of white workers had been born outside the UK, 5.6 % had been born in the EU15 and 3 % in the 10 accession countries (Table 2.14). Over three-quarters of South Asian and Black-African workers were born outside the UK, but 58.9 % of Black-Caribbean workers were UK-born.

**Table 2.7: Change in Percentage of Workers, Non-UK Born, 1994-2004, by Age Group**

|       | Workers 1994    |                           |                   |                           | Workers 2004    |                           |                   |                           |
|-------|-----------------|---------------------------|-------------------|---------------------------|-----------------|---------------------------|-------------------|---------------------------|
|       | Males<br>(000s) | Percent<br>Non-UK<br>born | Females<br>(000s) | Percent<br>Non-UK<br>born | Males<br>(000s) | Percent<br>Non-UK<br>born | Females<br>(000s) | Percent<br>Non-UK<br>born |
| 16-24 | 185             | 12.2                      | 199               | 16.0                      | 188             | 19.6                      | 185               | 23.5                      |
| 25-34 | 493             | 18.5                      | 406               | 19.3                      | 517             | 36.7                      | 399               | 35.1                      |
| 35-44 | 358             | 28.0                      | 298               | 27.8                      | 529             | 34.2                      | 388               | 33.0                      |
| 45-59 | 366             | 24.0                      | 330               | 25.8                      | 474             | 32.6                      | 403               | 30.6                      |
| 60-64 | 65              | 24.9                      | 39                | 17.5                      | 77              | 31.8                      | 44                | 29.2                      |
| Total | 1,467           | 21.7                      | 1,271             | 22.4                      | 1,821           | 32.8                      | 1,444             | 31.4                      |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.8: Percentage of Migrants in the Employed Workforce by Age Group, 1994**

| Age<br>group | Males<br>in work<br>(000s) | Country of birth |                |                 |                  | Females<br>in work<br>(000s) | Country of birth |                |                 |                  |
|--------------|----------------------------|------------------|----------------|-----------------|------------------|------------------------------|------------------|----------------|-----------------|------------------|
|              |                            | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |                              | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |
| 16-24        | 185                        | 87.8             | -              | -               | 9.6              | 199                          | 84.0             | 4.5            | -               | 11.0             |
| 25-34        | 493                        | 81.5             | 2.7            | -               | 15.1             | 406                          | 80.7             | 3.4            | -               | 15.6             |
| 35-44        | 358                        | 72.0             | 2.7            | -               | 24.2             | 298                          | 72.2             | 3.0            | -               | 23.6             |
| 45-59        | 366                        | 76.0             | 3.1            | 2.0             | 18.9             | 330                          | 74.2             | 4.2            | 2.2             | 19.3             |
| 60-64        | 65                         | 75.1             | -              | -               | 21.0             | 39                           | 82.5             | -              | -               | -                |
| Total        | 1,467                      | 78.3             | 2.7            | 1.2             | 17.8             | 1,271                        | 77.6             | 3.7            | 1.1             | 17.6             |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.9: Percentage of Migrants in the Employed Workforce by Age Group, 2004**

| Age<br>group | Males<br>in work<br>(000s) | Country of birth |                |                 |                  | Females<br>in work<br>(000s) | Country of birth |                |                 |                  |
|--------------|----------------------------|------------------|----------------|-----------------|------------------|------------------------------|------------------|----------------|-----------------|------------------|
|              |                            | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |                              | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |
| 16-24        | 188                        | 80.4             | -              | -               | 16.3             | 185                          | 76.5             | 3.6            | 3.5             | 16.4             |
| 25-34        | 517                        | 63.3             | 6.6            | 3.0             | 27.1             | 399                          | 64.9             | 6.5            | 3.5             | 25.1             |
| 35-44        | 529                        | 65.8             | 5.2            | 1.4             | 27.6             | 388                          | 67.0             | 4.5            | -               | 26.9             |
| 45-59        | 474                        | 67.4             | 2.3            | 2.3             | 28.1             | 403                          | 69.4             | 2.7            | 1.5             | 26.4             |
| 60-64        | 77                         | 68.2             | -              | -               | 25.7             | 44                           | 70.8             | -              | -               | 24.6             |
| Total        | 1,821                      | 67.2             | 4.3            | 2.3             | 26.1             | 1,444                        | 68.6             | 4.4            | 2.4             | 24.6             |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.10: Change in Percentage of Workers, Non-UK Born, 1994-2004, by Industry**

|                                | Workers 1994    |                           |                   |                           | Workers 2004    |                           |                   |                           |
|--------------------------------|-----------------|---------------------------|-------------------|---------------------------|-----------------|---------------------------|-------------------|---------------------------|
|                                | Males<br>(000s) | Percent<br>Non-UK<br>born | Females<br>(000s) | Percent<br>Non-UK<br>born | Males<br>(000s) | Percent<br>Non-UK<br>born | Females<br>(000s) | Percent<br>Non-UK<br>born |
| Agriculture etc                | 4               | -                         | 2                 | -                         | 3               | -                         | 4                 | -                         |
| Mining & quarrying             | 3               | -                         | 1                 | -                         | 3               | -                         | 1                 | -                         |
| Food, drink & tobacco          | 13              | 39.9                      | 6                 | -                         | 11              | 51.8                      | 4                 | -                         |
| Engineering                    | 42              | 18.8                      | 21                | 36.9                      | 42              | 34.4                      | 10                | 57.0                      |
| Rest of manufacturing          | 128             | 22.7                      | 74                | 25.2                      | 106             | 24.2                      | 53                | 32.1                      |
| Electricity, gas & water       | 9               | 0.0                       | 4                 | -                         | 8               | 19.2                      | 2                 | -                         |
| Construction                   | 134             | 11.2                      | 18                | 18.9                      | 192             | 28.0                      | 19                | 24.6                      |
| Distribution                   | 224             | 24.1                      | 184               | 21.4                      | 240             | 35.4                      | 201               | 33.0                      |
| Hotels and catering            | 65              | 57.8                      | 57                | 40.5                      | 94              | 70.3                      | 52                | 50.9                      |
| Transport & telecommunications | 177             | 22.6                      | 57                | 23.9                      | 198             | 32.4                      | 61                | 32.1                      |
| Banking & insurance            | 119             | 17.4                      | 102               | 16.2                      | 140             | 36.3                      | 93                | 26.5                      |
| Other business services        | 239             | 19.3                      | 181               | 17.5                      | 354             | 30.7                      | 234               | 30.3                      |
| Public admin and defence       | 93              | 9.0                       | 85                | 19.0                      | 112             | 25.2                      | 112               | 28.3                      |
| Education                      | 54              | 20.6                      | 150               | 17.8                      | 76              | 33.9                      | 197               | 24.5                      |
| Health and social work         | 72              | 32.9                      | 227               | 26.2                      | 98              | 32.3                      | 258               | 35.3                      |
| Miscellaneous services         | 121             | 19.5                      | 120               | 24.6                      | 140             | 22.5                      | 140               | 31.4                      |
| <b>Total</b>                   | <b>1,496</b>    | <b>21.6</b>               | <b>1,289</b>      | <b>22.3</b>               | <b>1,818</b>    | <b>32.7</b>               | <b>1,442</b>      | <b>31.4</b>               |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.11: Percentage of Migrants in the Employed Workforce by Industry, 1994**

|                                | Males<br>in work<br>(000s) | Country of birth |                |                 |                  | Females<br>in work<br>(000s) | Country of birth |                |                 |                  |
|--------------------------------|----------------------------|------------------|----------------|-----------------|------------------|------------------------------|------------------|----------------|-----------------|------------------|
|                                |                            | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |                              | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |
| Agriculture etc                | 4                          | -                |                |                 | -                | 2                            | -                | -              |                 |                  |
| Mining & quarrying             | 3                          | -                |                |                 | -                | 1                            | -                |                |                 |                  |
| Food, drink & tobacco          | 13                         | 60.1             | -              |                 | -                | 6                            | -                |                |                 | -                |
| Engineering                    | 42                         | 81.2             | -              | -               | 17.5             | 21                           | 63.1             | -              |                 | 32.4             |
| Rest of manufacturing          | 128                        | 77.3             | -              | -               | 17.7             | 74                           | 74.8             | -              | -               | 18.3             |
| Electricity, gas & water       | 9                          | 100.0            |                |                 |                  | 4                            | -                |                |                 | -                |
| Construction                   | 134                        | 88.8             | -              | -               | 9.3              | 18                           | 81.1             | -              |                 | -                |
| Distribution                   | 224                        | 75.9             | -              | -               | 20.6             | 184                          | 78.6             | -              | -               | 17.5             |
| Hotels and catering            | 65                         | 42.2             | 14.7           | -               | 38.4             | 57                           | 59.5             | 10.8           | -               | 27.5             |
| Transport & telecommunications | 177                        | 77.4             | -              | -               | 20.0             | 57                           | 76.1             | -              | -               | 19.0             |
| Banking & insurance            | 119                        | 82.6             | -              | -               | 13.5             | 102                          | 83.8             | -              | -               | 11.2             |
| Other business services        | 239                        | 80.7             | 3.2            | -               | 15.2             | 181                          | 82.5             | -              | -               | 14.2             |
| Public admin and defence       | 93                         | 91.0             | -              | -               | 8.2              | 85                           | 81.0             | -              | -               | 16.3             |
| Education                      | 54                         | 79.4             | -              | -               | 16.7             | 150                          | 82.2             | 4.3            | -               | 12.3             |
| Health and social work         | 72                         | 67.1             | -              | -               | 29.4             | 227                          | 73.8             | 3.0            | -               | 22.5             |
| Miscellaneous services         | 121                        | 80.5             | -              | -               | 15.5             | 120                          | 75.4             | 5.7            | -               | 17.5             |
| <b>Total</b>                   | <b>1,496</b>               | <b>78.4</b>      | <b>2.8</b>     | <b>1.2</b>      | <b>17.6</b>      | <b>1,289</b>                 | <b>77.7</b>      | <b>3.7</b>     | <b>1.2</b>      | <b>17.5</b>      |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.12: Percentage of Migrants in the Employed Workforce by Industry, 2004**

|                                | Males<br>in work<br>(000s) | Country of birth |                |                 |                  | Females<br>in work<br>(000s) | Country of birth |                |                 |                  |
|--------------------------------|----------------------------|------------------|----------------|-----------------|------------------|------------------------------|------------------|----------------|-----------------|------------------|
|                                |                            | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |                              | UK               | Other<br>EU 15 | Accession<br>10 | Rest of<br>world |
| Agriculture etc                | 3                          | -                | -              | -               | -                | 4                            | -                | -              | -               | -                |
| Mining & quarrying             | 3                          | -                | -              | -               | -                | 1                            | -                | -              | -               | -                |
| Food, drink & tobacco          | 11                         | -                | -              | -               | -                | 4                            | -                | -              | -               | -                |
| Engineering                    | 42                         | 65.6             | -              | -               | 29.4             | 10                           | -                | -              | -               | -                |
| Rest of manufacturing          | 106                        | 75.8             | -              | -               | 21.1             | 53                           | 67.9             | -              | -               | 19.4             |
| Electricity, gas & water       | 8                          | 80.8             | -              | -               | -                | 2                            | -                | -              | -               | -                |
| Construction                   | 192                        | 72.0             | -              | 9.0             | 17.4             | 19                           | 75.4             | -              | -               | -                |
| Distribution                   | 240                        | 64.6             | 3.5            | -               | 30.5             | 201                          | 67.0             | 4.0            | -               | 26.5             |
| Hotels and catering            | 94                         | 29.7             | 10.6           | -               | 55.0             | 52                           | 49.1             | -              | -               | 36.0             |
| Transport & telecommunications | 198                        | 67.6             | 3.2            | -               | 26.7             | 61                           | 67.9             | -              | -               | 25.4             |
| Banking & insurance            | 140                        | 63.7             | 10.8           | -               | 25.1             | 93                           | 73.5             | -              | -               | 20.0             |
| Other business services        | 354                        | 69.3             | 4.2            | -               | 25.4             | 234                          | 69.7             | 5.6            | -               | 22.2             |
| Public admin and defence       | 112                        | 74.8             | -              | -               | 22.2             | 112                          | 71.7             | -              | -               | 25.5             |
| Education                      | 76                         | 66.1             | 8.9            | -               | 24.1             | 197                          | 75.5             | 3.8            | -               | 19.6             |
| Health and social work         | 98                         | 67.7             | -              | -               | 27.3             | 258                          | 64.7             | 2.7            | -               | 30.8             |
| Miscellaneous services         | 140                        | 77.5             | -              | -               | 18.8             | 140                          | 68.6             | 5.4            | 4.9             | 21.1             |
| <b>Total</b>                   | <b>1,818</b>               | <b>67.3</b>      | <b>4.3</b>     | <b>2.3</b>      | <b>26.1</b>      | <b>1,442</b>                 | <b>68.6</b>      | <b>4.4</b>     | <b>2.4</b>      | <b>24.6</b>      |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.13: Percentage of Migrants by Occupation, 2004**

|  | All in<br>work (000s) | Born in<br>UK | Born in<br>EU 15 | Born in<br>Accession<br>10 | Born in<br>rest of<br>world |
|--|-----------------------|---------------|------------------|----------------------------|-----------------------------|
| Managers and Senior Officials          | 577                   | 69.9          | 5.8              | 1.8                        | 22.5                        |
| Professional occupations               | 530                   | 68.1          | 5.3              | 0.7                        | 25.9                        |
| Associate Professional and Technical   | 586                   | 73.5          | 4.6              | 0.8                        | 21.1                        |
| Administrative and Secretarial         | 438                   | 73.7          | 3.2              | 1.3                        | 21.8                        |
| Skilled Trades Occupations             | 271                   | 65.0          | 2.6              | 6.8                        | 25.6                        |
| Personal Service Occupations           | 207                   | 62.6          | 4.4              | 4.0                        | 29.0                        |
| Sales and Customer Service Occupations | 207                   | 66.0          | 3.3              | -                          | 29.4                        |
| Machine and Transport Operatives       | 154                   | 64.0          | 2.3              | 3.9                        | 29.8                        |
| Elementary Occupations                 | 292                   | 52.8          | 4.5              | 5.5                        | 37.3                        |
| All occupations                        | 3,263                 | 67.8          | 4.3              | 2.3                        | 25.5                        |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

**Table 2.14: Percentage of Migrants by Ethnic Group, 2004**

|                   | All in<br>work (000: | Born in<br>UK | Born in<br>EU 15 | Born in<br>Accession<br>10 | Born in<br>rest of<br>world |
|-------------------|----------------------|---------------|------------------|----------------------------|-----------------------------|
| White             | 2,378                | 81.7          | 5.6              | 3.0                        | 9.8                         |
| Mixed             | 53                   | 55.0          | -                | -                          | 39.8                        |
| Indian            | 219                  | 29.7          |                  |                            | 70.3                        |
| Pakistani         | 52                   | 27.3          |                  |                            | 72.7                        |
| Bangladeshi       | 44                   | 23.5          |                  |                            | 76.5                        |
| Other Asian       | 78                   | 10.6          |                  |                            | 89.4                        |
| Black-Caribbean   | 141                  | 58.9          | -                |                            | 40.5                        |
| Black-African     | 139                  | 17.7          | -                |                            | 81.4                        |
| Black-Other       | 11                   | 68.1          | -                |                            | 29.1                        |
| Chinese           | 26                   | 30.9          |                  |                            | 69.1                        |
| Other             | 115                  | 15.8          | 4.3              | 3.4                        | 76.5                        |
| All Ethnic groups | 3,257                | 67.9          | 4.4              | 2.3                        | 25.4                        |

Source: IER estimates based on the LFS.

Note: Following ONS guidelines, percentages based on numbers below 6,000 individuals have been suppressed and replaced by the symbol “-”.

## 2.4 Key Structural Features of the Labour Market

This section presents some more general information on labour market trends and prospects, across **all** ethnic groups. This is based on data from *Working Futures* and is consistent with the material presented above. It is intended to provide a context for the developments in employment patterns by ethnic group, etc, discussed above.

Figures 2.4 and 2.5 provide a brief summary of the key features of general employment patterns in the geographical area concerned, focussing upon patterns and projected future changes by:

- gender & status;
- sector; and
- occupation.

Figure 2.4 presents an overview of the current position. Figure 2.5 shows the projected position in 2014, based on *Working Futures*.

The first panel of each figure shows the size of the population in the region, the population aged 16+ and the labour force. Further details of demographic and labour force trends by age and gender are provided in Section 2.5. This first panel also shows the two main measures of employment used in this study. Total workplace employment is a measure of the number of jobs in the region. The second measure is the number of employed residents (heads). The former is the main measure of employment used in *Working Futures*. The second measure is more directly comparable with the labour supply indicators such as population and the labour force which also focus on 'heads' and are residence based. Finally the first panel shows two measures of unemployment. The first is the claimant count. The second is the more comprehensive ILO measure which covers all those actively searching for work. Further details of the various definitions used are given in Box 2.1.

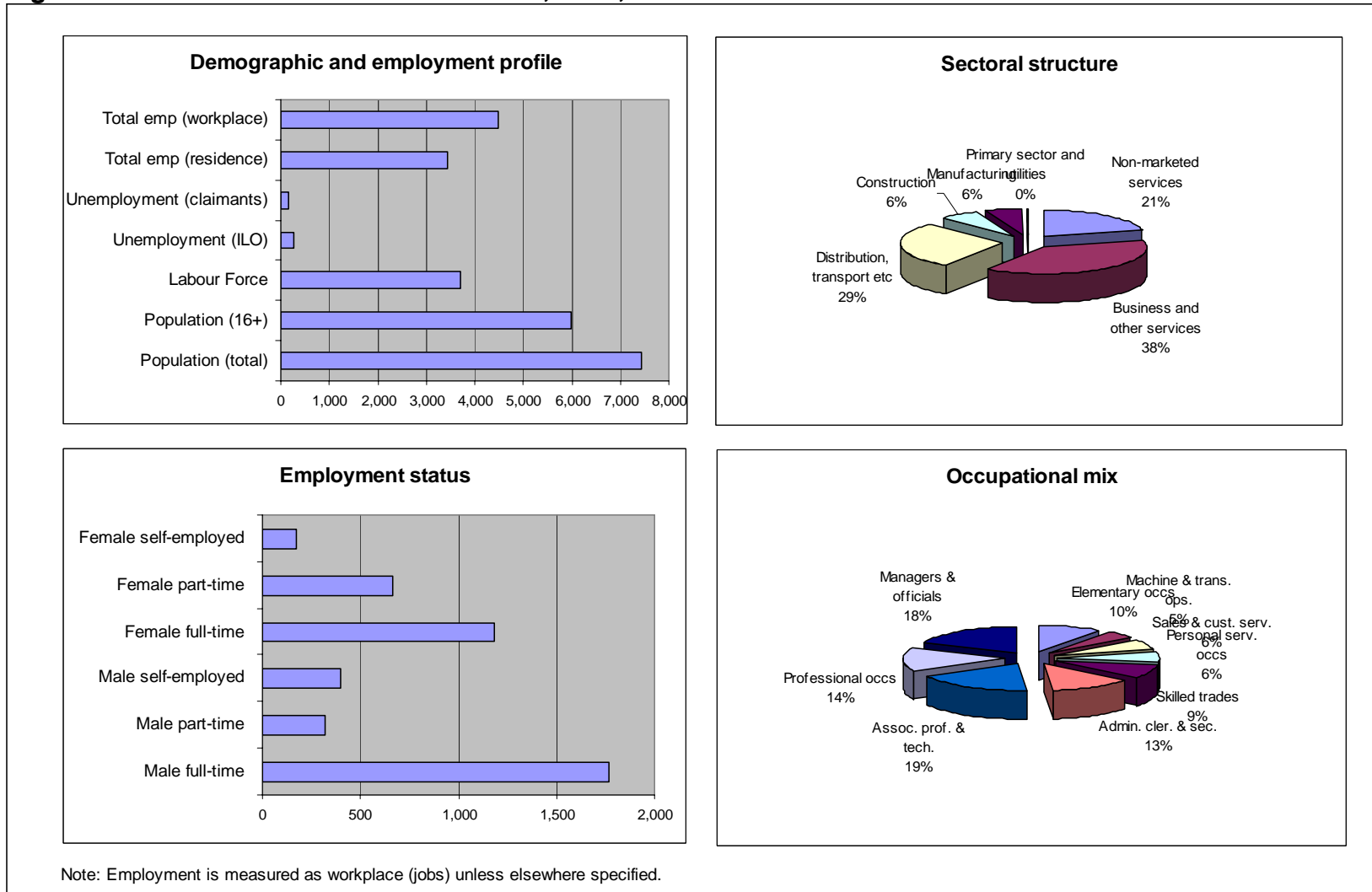
Figures 2.6 and 2.7 show how these patterns of change vary. Figure 2.6 illustrates the absolute changes. Figure 2.7 presents percentage increases, including the corresponding rate of change in Great Britain as a whole, so that the region's experience can be compared to the general position.

The three other panels of Figures 2.6 and 2.7 illustrate the structure of employment by:

- sector;
- employment status and gender; and by
- occupation.

A more detailed discussion of general prospects for the region can be found in the *Working Futures* spatial report, See Green *et al.* (2005).

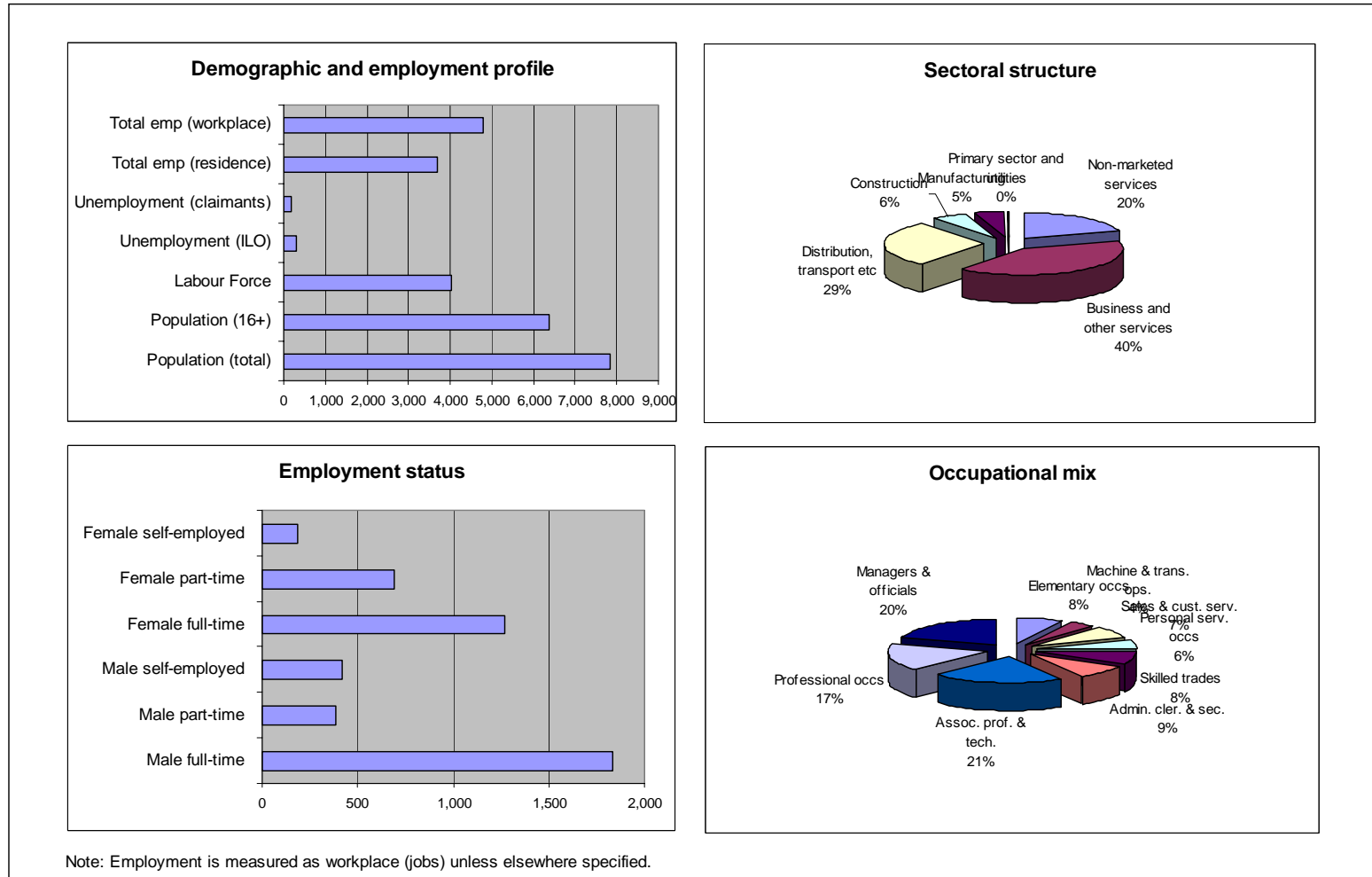
**Figure 2.4: General Labour Market Profile, 2004, London**



Source: IER estimates based on *Working Futures 2004-2014*.

Notes employment estimates are workplace (jobs) unless elsewhere specified.

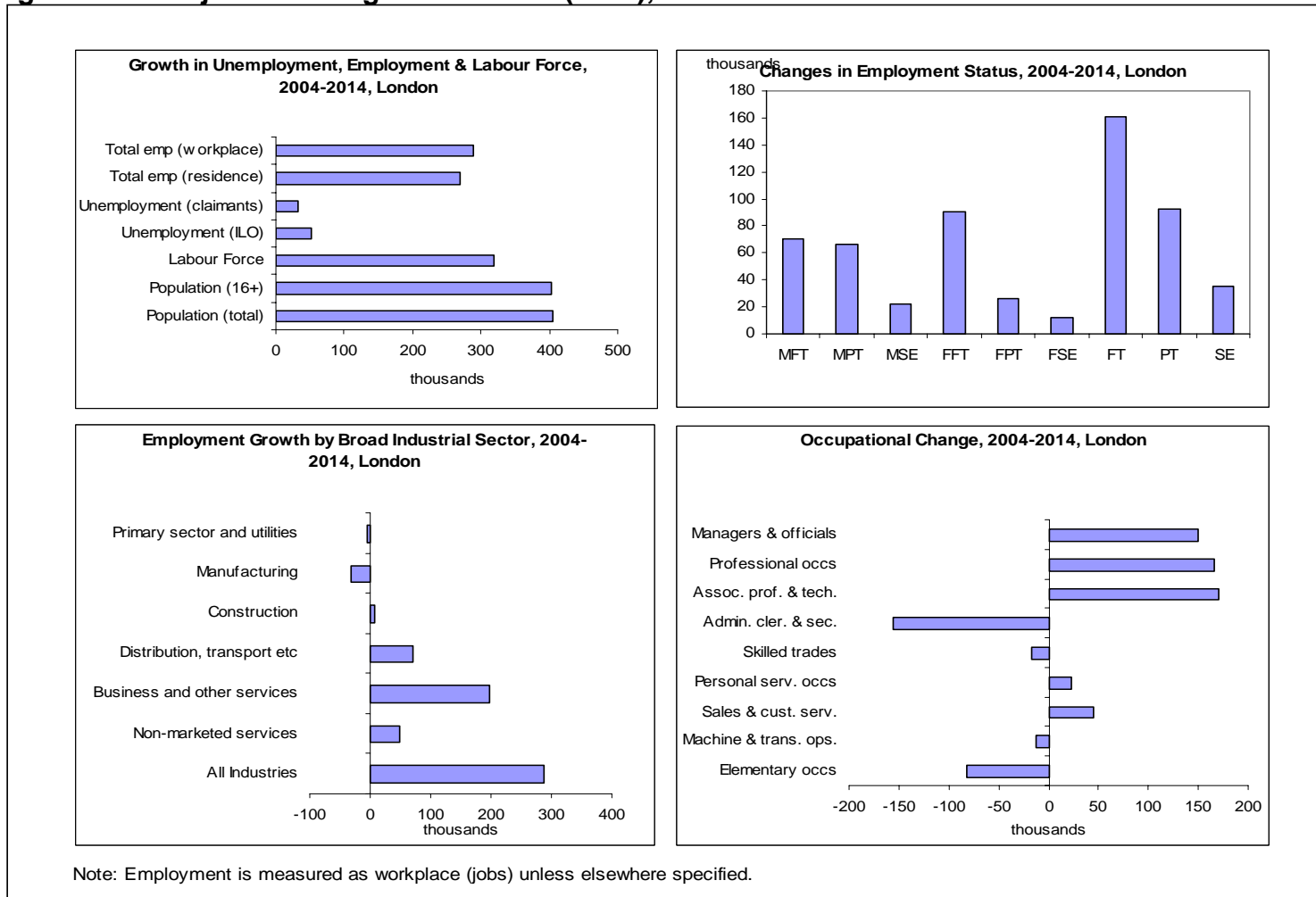
**Figure 2.5: General Labour Market Profile, 2014, London**



Source: IER estimates based on *Working Futures 2004-2014*.

Notes employment estimates are workplace (jobs) unless elsewhere specified.

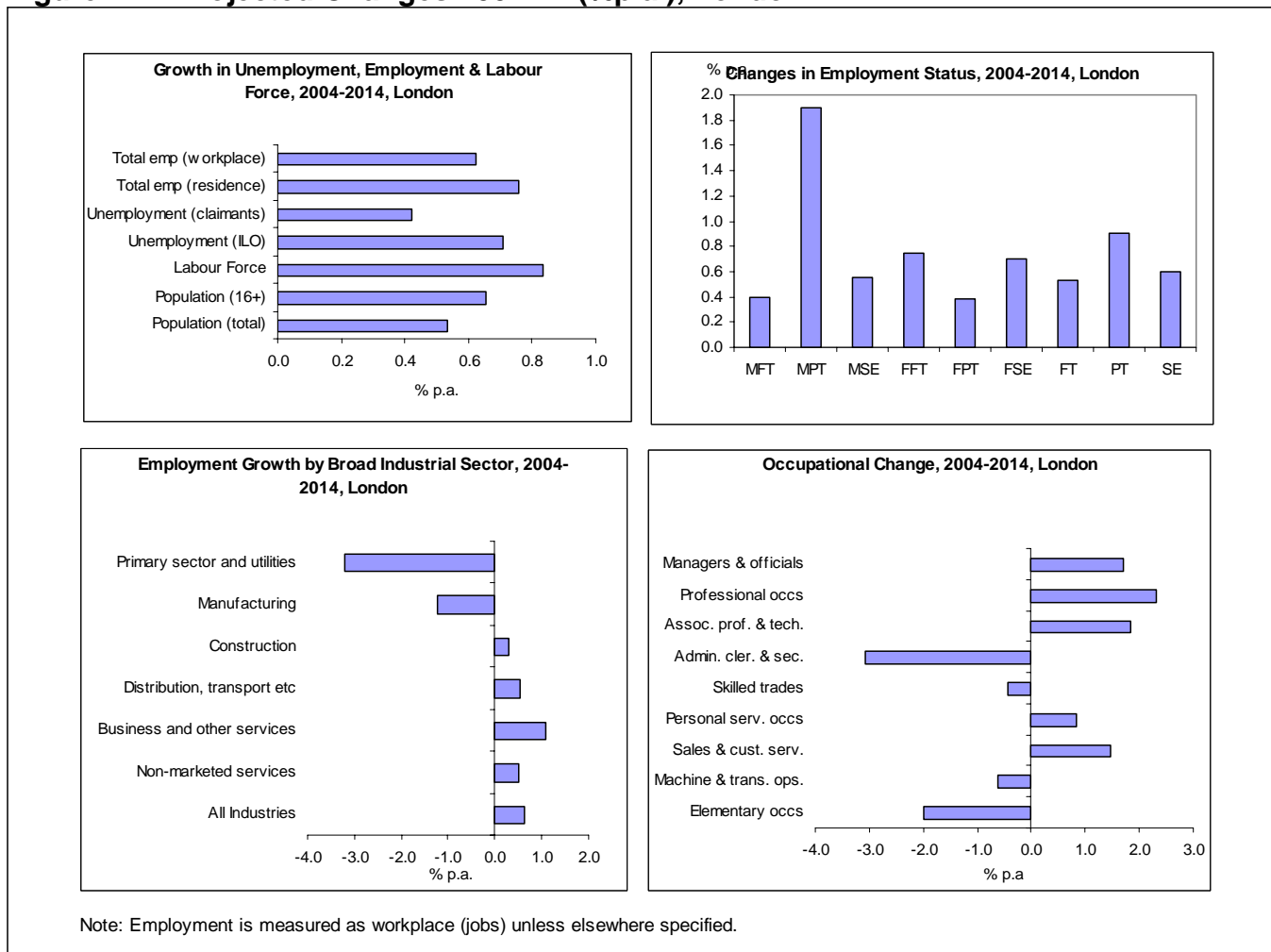
**Figure 2.6: Projected Changes 2004-2014 (000s), London**



Key: MFT: males full-time employees; MPT: male part-time employees; MSE: males self-employed; FFT: female full-time employees; FPT: female part-time employees; FSE: female self-employed; FT: full-time employees; PT: part-time employees; SE: self-employed  
 Source: IER estimates based on *Working Futures 2004-2014*.

Notes: Employment estimates are workplace (jobs) unless elsewhere specified.

**Figure 2.7: Projected Changes 2004-14 (%p.a.), London**



Key: MFT: males full-time employees; MPT: male part-time employees; MSE: males self-employed; FFT: female full-time employees; FPT: female part-time employees; FSE: female self-employed; FT: full-time employees; PT: part-time employees; SE: self-employed  
 Source: IER estimates based on *Working Futures 2004-2014*.

Notes: Employment estimates are workplace (jobs) unless elsewhere specified.

## 2.5 Demographic structure

### *Profiles of population and the workforce by age and gender*

Table 2.15 presents estimates and projections of population by gender and broad age group for the region. These are based on official ONS/GAD estimates although the projections have been modified to reflect migration patterns between regions as developed in the CE multisectoral regional model (MRM). They do not include a breakdown by ethnic group. At present there are no official projections of labour supply by ethnic group. ONS plan to produce such projections in the near future. Once available this will enable projections of labour supply by ethnic group to be produced.

The results suggest that patterns of change for the region are generally similar to those for England as a whole. Declines are projected for males in the younger age categories and for prime age females (aged 35-44). The fastest increases are for males aged 45-59.

### *The Labour Force*

The projections of the labour force are based on estimates developed by Cambridge Econometrics which extend those developed for *Working Futures* by adding an age dimension. They are based upon a disaggregated model which relates the proportion of the population that is economically active to the unemployment rate. Details of the various indicators used are given in Box 2.1. The results in Table 2.16 present historical estimates and projections of the total numbers economically active (the labour force).

The labour force as a whole is projected to grow by just under 9% by 2014. This reflects the demographic changes already discussed. The biggest increases are expected for older workers (45+).

### *Activity Rates*

Table 2.17 illustrates patterns of economic activity rates (labour force as a percentage of the population). Activity rates are generally expected to rise for many but not all gender/age categories. The largest increases are projected for females aged 25-34 (just over 3 percentage points). This reflects growing concerns about the pension crisis and the need for people to work longer.

**Box 2.1: Definitions of Employment and Related Labour Market Indicators****Alternative Definitions**

There are various ways of looking at employment. For example, a distinction can be made between the number of people in employment (head count) and the number of jobs. These two concepts represent different things, as one person may hold more than one job. In addition, a further distinction can be made between area of residence and area of workplace. Similarly there are various different definitions of unemployment, the labour force, workforce and population. In *Working Futures 2004-2014* the following definitions are used:

**Residence basis:** measured at place of residence (as in the Labour Force Survey (LFS)).

**Workplace basis:** measured at place of work (as in the Annual Business Inquiry (ABI)).

**Workplace employment** (number of jobs): these are typically estimated using surveys of employers, such as the ABI, focussing upon the numbers of jobs in their establishments. In this report references to employment relate to the number of jobs unless otherwise stated.

**Employed residents (head count):** the number of people in employment. These estimates are based primarily on data collected in household surveys, e.g. the LFS. People are classified according to their main job. Some have more than one job.

**ILO unemployment:** covers people who are out of work, want a job, have actively sought work in the previous four weeks and are available to start work within the next fortnight (or out of work and have accepted a job that they are waiting to start in the next fortnight).

**Claimant Unemployed:** measures people claiming Job Seeker's Allowance benefits.

**Workforce:** the total number of workforce jobs, and is obtained by summing workplace employment (employee jobs and self-employment jobs), HM Forces, government-supported trainees and claimant unemployment.

**Labour Force:** employed residents plus ILO unemployment.

**Labour market participation** or **Economic activity rate:** the number of people who are in employment or (ILO) unemployed as a percentage of the total population aged 16 and over.

**Labour Market Accounts Residual:** workplace employment minus residence employment. The main cause of the residual at national level is "double jobbing". At a more disaggregated spatial level, net commuting across geographical boundaries is also very significant. The difference will also reflect data errors and other minor differences in data collection methods in the various sources.

**Total Population:** the total number of people resident in an area (residence basis).

**Population 16+:** the total number of people aged 16 and above (residence basis).

**Working-age population:** the total number of people aged, (residence basis).

**Table 2.15: Population, London**

| Total    |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 1,441  | 1,443 | 2         | 0.1        |
| 2        | 16-24 | 897    | 906   | 9         | 1.0        |
| 3        | 25-34 | 1,446  | 1,466 | 20        | 1.4        |
| 4        | 35-44 | 1,259  | 1,264 | 5         | 0.4        |
| 5        | 45-59 | 1,214  | 1,484 | 270       | 22.2       |
| 6        | 60-64 | 276    | 320   | 44        | 15.9       |
| 7        | 65+   | 890    | 945   | 55        | 6.2        |
| All ages |       | 7,423  | 7,828 | 405       | 5.5        |

| Males    |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 735    | 734   | -1        | -0.1       |
| 2        | 16-24 | 444    | 440   | -4        | -0.9       |
| 3        | 25-34 | 747    | 753   | 6         | 0.8        |
| 4        | 35-44 | 641    | 679   | 38        | 5.9        |
| 5        | 45-59 | 593    | 753   | 160       | 27.0       |
| 6        | 60-64 | 132    | 153   | 21        | 15.9       |
| 7        | 65+   | 381    | 419   | 38        | 10.0       |
| All ages |       | 3,673  | 3,931 | 258       | 7.0        |

| Females  |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 706    | 709   | 3         | 0.4        |
| 2        | 16-24 | 453    | 466   | 13        | 2.9        |
| 3        | 25-34 | 699    | 713   | 14        | 2.0        |
| 4        | 35-44 | 618    | 585   | -33       | -5.3       |
| 5        | 45-59 | 621    | 731   | 110       | 17.7       |
| 6        | 60-64 | 144    | 167   | 23        | 16.0       |
| 7        | 65+   | 509    | 526   | 17        | 3.3        |
| All ages |       | 3,750  | 3,897 | 147       | 3.9        |

Source: *Working Futures 2004-2014*, extended (CE MRM).

**Table 2.16: Labour Force, London**

| Total    |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 0      | 0     | 0         | 0.0        |
| 2        | 16-24 | 513    | 534   | 21        | 4.1        |
| 3        | 25-34 | 1,025  | 1,066 | 41        | 4.0        |
| 4        | 35-44 | 1,006  | 1,014 | 8         | 0.8        |
| 5        | 45-59 | 951    | 1,171 | 220       | 23.1       |
| 6        | 60-64 | 135    | 159   | 24        | 17.8       |
| 7        | 65+   | 64     | 70    | 6         | 9.4        |
| All ages |       | 3,694  | 4,014 | 320       | 8.7        |

| Males    |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 0      | 0     | 0         | 0.0        |
| 2        | 16-24 | 263    | 265   | 2         | 0.8        |
| 3        | 25-34 | 580    | 588   | 8         | 1.4        |
| 4        | 35-44 | 578    | 604   | 26        | 4.5        |
| 5        | 45-59 | 515    | 643   | 128       | 24.9       |
| 6        | 60-64 | 84     | 99    | 15        | 17.9       |
| 7        | 65+   | 39     | 43    | 4         | 10.3       |
| All ages |       | 2,059  | 2,242 | 183       | 8.9        |

| Females  |       | (000s) |       |           |            |
|----------|-------|--------|-------|-----------|------------|
|          |       | 2004   | 2014  | 2004-2014 | % increase |
| 1        | 0-15  | 0      | 0     | 0         | 0.0        |
| 2        | 16-24 | 250    | 269   | 19        | 7.6        |
| 3        | 25-34 | 445    | 478   | 33        | 7.4        |
| 4        | 35-44 | 428    | 410   | -18       | -4.2       |
| 5        | 45-59 | 436    | 528   | 92        | 21.1       |
| 6        | 60-64 | 51     | 60    | 9         | 17.6       |
| 7        | 65+   | 25     | 27    | 2         | 8.0        |
| All ages |       | 1,635  | 1,772 | 137       | 8.4        |

Source: *Working Futures 2004-2014*, extended (CE MRM).

Note: Numbers of people (residents/heads).

**Table 2.17: Activity rates, London**

| Total    |       | %    |      |           |
|----------|-------|------|------|-----------|
|          |       | 2004 | 2014 | 2004-2014 |
| 1        | 0-15  | 0.0  | 0.0  | 0.0       |
| 2        | 16-24 | 57.2 | 58.9 | 1.7       |
| 3        | 25-34 | 70.9 | 72.7 | 1.8       |
| 4        | 35-44 | 79.9 | 80.2 | 0.3       |
| 5        | 45-59 | 78.3 | 78.9 | 0.6       |
| 6        | 60-64 | 48.9 | 49.7 | 0.8       |
| 7        | 65+   | 7.2  | 7.4  | 0.2       |
| All ages |       | 49.8 | 51.3 | 1.5       |

| Males    |       | %    |      |           |
|----------|-------|------|------|-----------|
|          |       | 2004 | 2014 | 2004-2014 |
| 1        | 0-15  | 0.0  | 0.0  | 0.0       |
| 2        | 16-24 | 59.2 | 60.2 | 1.0       |
| 3        | 25-34 | 77.6 | 78.1 | 0.4       |
| 4        | 35-44 | 90.2 | 89.0 | -1.2      |
| 5        | 45-59 | 86.8 | 85.4 | -1.5      |
| 6        | 60-64 | 63.6 | 64.7 | 1.1       |
| 7        | 65+   | 10.2 | 10.3 | 0.0       |
| All ages |       | 56.1 | 57.0 | 1.0       |

| Females  |       | %    |      |           |
|----------|-------|------|------|-----------|
|          |       | 2004 | 2014 | 2004-2014 |
| 1        | 0-15  | 0.0  | 0.0  | 0.0       |
| 2        | 16-24 | 55.2 | 57.7 | 2.5       |
| 3        | 25-34 | 63.7 | 67.0 | 3.4       |
| 4        | 35-44 | 69.3 | 70.1 | 0.8       |
| 5        | 45-59 | 70.2 | 72.2 | 2.0       |
| 6        | 60-64 | 35.4 | 35.9 | 0.5       |
| 7        | 65+   | 4.9  | 5.1  | 0.2       |
| All ages |       | 43.6 | 45.5 | 1.9       |

Source: Working Futures 2004-2014, extended (CE MRM).

## Annex A

### *Background, Aims and Objectives*

The present analysis builds upon *Working Futures 2004-2014*. *Working Futures* presents the most detailed and comprehensive set of employment and labour market projections ever produced for the UK.<sup>2,3</sup> *Working Futures* already provides a comprehensive analysis of changing patterns of employment by gender, status, sector and occupation for all the countries of the UK and the English regions. The present report adds value to this by extending the analysis in a number of important respects.

First, a detailed analysis of historical patterns of employment, distinguishing ethnicity and migrant workers is conducted across the 9 regions of England and at national (England, and in some cases at a GB) level. This is based on an interrogation of data from the Labour Force Survey (LFS) and the Census of Population (CoP). Where possible, the historical profiles of change by ethnic group have been explored in detail (as far as the available data permit), including analyses by industry and by occupation. The available historical information on migrant workers is also highlighted, including some of the issues surrounding factors influencing migration flows, relevant policies and measurement issues. This information is more limited than that available on ethnicity generally.

Second, the *Working Futures* analysis of labour supply is extended to cover age as well as gender. Again this covers both historical patterns and expected future trends for each of the English regions. Detailed profiles of the changing age structure of the population and workforce are presented. It is important to note that at present no projections of labour supply by ethnic group have been produced as part of this project. At present ONS do not produce projections of population by ethnic group although such analysis is planned. Once available this will enable projections of labour supply by ethnic group to be produced.

Third, material taken from *Working Futures* is repackaged in a novel fashion to focus attention on the different patterns of employment, both historical and projected, in the 9 regions of England. This analysis focuses upon gender, status, sector and occupation. This section focuses on providing a brief graphical and tabular summary of the main characteristics of the national and regional economies in terms of current employment patterns and expected future change (2004-14), with particular emphasis on expected structural change by sector and occupation.

The main *Working Futures* database relates to workplace employment (jobs). Employment matrices are developed using LFS data (residence/heads), showing how patterns of employment by ethnic group and migrant workers vary across both sector and occupation. These matrices are then applied to the estimated levels of workplace employment (jobs) by sector and occupation taken from *Working Futures* to give estimates of jobs by ethnic group. Because of data limitations (and also the

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<sup>2</sup> The results of *Working Futures 2004-2014* are available in 5 separate volumes.

<sup>3</sup> *Working Futures 2004-2014* was commissioned by the SSSA and funded by the SSSA and its partners (including the LSC).

difficulty of taking into account underlying demographic changes), the exploration of trends in the numbers of migrant workers is much less comprehensive than that for ethnicity and the analysis for neither group includes projections.<sup>4</sup>

Where possible (given data limitations) an analysis of patterns by age and ethnicity is also undertaken. However, the data available are very limited and this is not comprehensive.

A standard set of “profiles” is developed for each region and the whole of England. These present information in a consistent and comparable format, enabling direct comparisons to be made. These profiles are primarily in the form of a standard set of tables and charts, with only limited text. The latter is confined to a few bullet points highlighting key features.

This quantitative analysis is complemented in the *National Report* by 2 small scale case studies intended to illustrate some of the key issues facing local LSCs and others in dealing with issues relating to ethnicity and migration. These case studies examine, briefly, the potential impact of a large scale development (the Thames Gateway) and explore, briefly, the position of an exemplar rural area reliant on migrant workers in some sectors/occupations (Norfolk). The selection of the case studies was made by the researchers, in conjunction with the project Steering Group.

The main period for analysis is 1994 - 2004, reflecting the historical period covered by the data from *Working Futures* with some projections of the labour force (not distinguishing ethnicity) for 2004-2014. Historical data are also exploited from a variety of other sources in addition to the LFS and the CoP in order to add insights into changing patterns by ethnicity, age and migrant workers which are not covered in the main *Working Futures* database.

The *National Report* and *Regional Profiles* are complemented by a *Technical Report*. This explains the data sources used, outlines definitional issues and problems and describes the general methodological approach employed.

It should be recognised that data limitations preclude producing comprehensive analyses of ethnicity and age across all the dimensions currently covered in *Working Futures*. Rather, the aim is to provide a summary of national and regional ethnic profiles, exploiting the data as far as possible to provide detail across all the selected dimensions.

In combination, this set of reports provides new information on a consistent and comparable basis across regions which highlight some of the key features of the industrial, occupational and geographical profiles for ethnic groups and migrant workers.

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<sup>4</sup> ONS are currently developing benchmark demographic projections by ethnic group which will enable such an extension in future.

## Glossary

|        |  |
|--------|--|
| A8     | Accession 8 countries: 8 of the 10 countries entering the EU in 2004 – the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia; (Malta and Cyprus were the other 2 new entrants to the EU) |
| BME    | Black and Minority Ethnic  |
| EEA    | European Economic Area   |
| EEDA   | East of England Development Agency   |
| ESF    | European Social Fund   |
| ESOL   | English for Speakers of Other Languages  |
| FE     | Further Education  |
| GLLaB  | Greenwich Local Labour and Business  |
| IAG    | Information Advice and Guidance  |
| LORECA | London Refugee Economic Action   |
| NARIC  | National Academic Recognition Information Centre   |
| NASS   | National Asylum Support Services   |
| NGO    | Non-Governmental Organisations   |
| NINo   | National Insurance Number  |
| PCT    | Primary Care Trust   |
| PSA    | Public Service Agreement   |
| RCO    | Refugee and Community Organisations  |
| RDA    | Regional Development Agency  |
| SAWS   | Seasonal Agricultural Workers Scheme   |

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