Sectoral Analysis for the Strategic Operations Group

September 2008

Information Service

Purpose:	This document forms the 'Sectoral Analysis for the Strategic Operations Group' section of the South West Strategic Analysis 2008. The Strategic Analysis is the annual 'stock-take' analysis and considers labour market intelligence, performance information and Government policy to develop a full strategic picture of current education and training marketplace. The analysis is supported by national skills research (including Skills in England Report 2007, National Employer Skills Survey and Working Futures). The stock-take provides the intelligence to confirm our strategies and priorities.
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Key Points

- The South West workforce (employees and self-employed) totals 2.4 million.
- Three sectors, Public Administration (29%), Distribution, hotels and restaurants and Banking and business services (18%) account for around 2 out of 3 jobs in the region.
- Most Sector Skills Council footprints (SSCs) individually account for less than 5% of employment with the exceptions of Skillsmart Retail (11.6%), People 1st (8.4%), Skills for Health (8.3%) and ConstructionSkills (5.1%).
- There are 215,100 employers in the economy, most of which are micro businesses employing fewer than 5 staff. Large firms with more than 200 employees account for just 1% of the business base.
- SSCs which are strongly characterised by micro businesses include e-skills, Skillset, SummitSkills, and Creative and Cultural skills.
- Long-term regional trends in employment have followed national patterns, with growth in the service sector and decline or, at best, stability in manufacturing and the primary sectors.
- 53% of the workforce are men and 47% women. In ConstructionSkills, Energy and Utility and SEMTA the proportions of men rise to more than three quarters of all employees.
- ConstructionSkills and SEMTA account for 1 in 4 of all male jobs in the region.
- Skillsmart Retail provides the greatest number of women's jobs (156,891 or 14%) with Skills for Health accounting for a further 12% (133,602 jobs) and Skills for Care and Development (9% or 97,533).
- Young people make up a third of the workforce in People 1st, SkillsActive and Skillsmart Retail. At the other end of the spectrum, some sectors will face particular issues in attracting sufficient young people to replace the large numbers of employees heading for retirement. In Asset Skills (44.5%), GoSkills (45.7%) and Lantra (41.5%) more than 4 in 10 employees are aged over 50.
- The highest qualified workforces are to be found in Lifelong Learning UK, Skills for Health, Government Skills, e-skills UK and Creative and Cultural Skills where more than half the staff are qualified to degree level and above.
- By far the largest numbers of people with low qualifications are to be found in Skillsmart Retail where a quarter of a million staff do not possess skills above Level 2. Employees in Construction Skills also have significant numbers (242,000 staff) without at least Level 2. Between them, these two sectors account for 1 in 4 of all the low skilled workers to be found in the region.
- The National Employers Skills Survey 2007 provides a range of data on the skills development and recruitment practice of employers. It shows that 17% of employers in the region have current vacancies. Of these vacancies, 35% are considered hard-to-fill. This is the largest proportion of any region.
- In particular, employers in five SSCs – SummitSkills, People 1st, Goskills, Financial Services and Skills for Health - are more likely than their national counterparts to experience recruitment difficulties.
- Of the hard to fill vacancies identified, 62% of them were considered hard to fill because of skill shortages. In these instances, employers most likely to identify

labour market issues such as low skills, lack of interest, qualifications and experience together with a lack of personal attributes and 'soft skills' as the main reasons for their difficulties.

- Two SSCs account for more than 1 in 5 of all skill shortage vacancies in the region – ConstructionSkills and People 1st.
- 16% of employers in the South West have skills gaps (i.e. a lack of proficiency amongst existing staff) somewhat above the national average (15%). Contrary to wider trends, skills gaps have increased in the South West since 2005.
- Skills gaps are especially concentrated amongst Sales and Customer Service occupations. Skills gaps in this occupational category account for 25% of all skills gaps even though jobs in this occupation account for just 15% of employment.
- In the last 12 months 68% of establishments in the South West provided training for one or more of their employees, slightly above the national average of 67%.
- Highest levels of training are to be found in SSCs which cover public sector employers. Lowest levels of training, by a significant margin, are to be found in employers covered by Lantra.
- On average, employers have delivered 8 days training per employee per annum across the South West; a figure below the national average of 10 days per employee and the lowest of any region.
- There is considerable scope to improve the awareness and take up of Train to Gain across the economy. Currently, just over 1 in 4 employers in the South West are aware of Train to Gain and 1 in 20 has been involved with it. Awareness and use is highest in the health and educations sectors (Lifelong Learning UK, Skills for Care and Development, and Skills for Health). Lowest levels of awareness are evident in employers covered by Energy and Utility Skills, Lantra and Automotive Skills.

The structure of the local economy

The South West economy has a workforce of 2.4 million which accounts for around 1 in 10 jobs (9.7%) in the country[1.] Employment in the region is distributed across an industrial structure which is very similar to that of the national economy. Although dominated by the service sector, manufacturing nevertheless continues to provide 1 in 8 of all jobs even though the sector's share of employment has declined through time.

In terms of broad industrial sector, the South West's principal sectors of employment are Public administration, education and health (28.8% of jobs), Distribution, hotels and restaurants (24.9%) and Banking, Finance and Insurance (18.4%). Between them, these three sectors account for almost **2 out of 3** jobs in the regional economy.

Compared with the national economy, the South West has below average employment in Transport and communications, Financial and business services and Other miscellaneous services, although the differences are not significant:

Figure 1: The structure of the South West economy and England compared (percent of employment by sector) 2007

	South West (%)	England (%)
Agriculture and fishing, Energy and water	1.0	1.3
Manufacturing	11.5	10.9
Construction	4.5	4.6
Distribution, hotels and restaurants	24.9	23.7
Transport and communications	4.9	6.1
Banking, finance and insurance/Business services	18.4	21.9
Public admin. education and health	28.8	26.3
Other services	5.0	6.2
% working age in employment who work in - total services	82.0	83.3

Source: ONS ABI 2006

More detailed analysis by Sector Skills Council (SSC) again underlines the similarity of the regional employment distribution with employment in England and it can be seen that:

- in terms of its share of employment, only Semta and Skillsmart Retail are above the national average by more than 1%.
- A significant proportion of employment (21.0%) does not fall within any SSC definition[2].
- Skillsmart Retail (11.6%), People 1st (8.4%) and Skills for Health (8.3%) are the largest sectors overall and account for more than 1 in 4 jobs in the regional economy.
- The only other sector to account for more than 5% of employment in the South West is ConstructionSkills (5.1%):

[1] Unless otherwise specified, 'country' refers to England.
[2] This includes all sectors not covered by an SSC and is primarily made up of Professional and Business services together with miscellaneous 'Other Manufacturing', Wholesale, air transport and 'Other Services'

Figure 2: Employees by SSC, South West economy and England compared 2006

	Numbers	% South West	% England
Asset Skills	66,600	3.0	3.3
Automotive Skills	52,900	2.4	2.1
Cogent	28,200	1.3	1.7
ConstructionSkills	112,000	5.1	5.0
Creative & Cultural Skills	17,200	0.8	0.9
Energy & Utility Skills	28,600	1.3	1.1
e-skills UK	53,800	2.5	3.2
Financial Services Skills Council	79,000	3.6	4.0
GoSkills	28,400	1.3	1.9
Government Skills	105,000	4.8	3.9
Improve Ltd	38,000	1.7	1.5
Lantra	12,000	0.5	0.4
Lifelong Learning UK	78,100	3.6	3.5
People 1st	183,800	8.4	7.5
Proskills UK	28,700	1.3	1.3
Semta	126,700	5.8	4.5
Skillfast-UK	14,100	0.6	0.8
Skills for Care and Development	104,200	4.8	4.1
Skills for Health	182,000	8.3	7.5
Skills for Justice	25,500	1.2	1.4
Skills for Logistics	57,000	2.6	3.0
SkillsActive	26,900	1.2	1.2
Skillset	8,100	0.4	0.5
Skillsmart Retail	253,300	11.6	10.5
SummitSkills	20,600	0.9	1.1
Non-SSC	459,600	21.0	23.7
TOTAL	**2,190,300**	**100.0**	**100.0**

Source: ONS ABI 2006 (numbers may not add due to rounding)

Business and enterprise

The South West's business base is made up of **215,100** establishments[3]. This total has increased by 5.2% since 2004, in line with growth in the national economy.

As can be seen, the distribution of employers differs from that of employees, with sectors such as ConstructionSkills and e-skills UK, which are dominated by small firms, accounting for a greater share of the business base than employers than their employment share might suggest:

[3] Technical note: The ABI is the standard national source of official statistics on workplace estimates of jobs and businesses in the UK. It is based on a survey, but that survey is compulsory for all those selected. ABI statistics allow for comparisons across regions and through different timescales because all data has been collected on a consistent basis. However, it excludes businesses not registered for VAT and/or PAYE, it also excludes farm-based employment. In an economy such as the South West which has above average proportions of micro businesses and self–employment, jobs are likely to be underestimated and figures therefore differ from those derived from the Labour Force Survey.

Figure 3: Employees by SSC, South West economy and England compared 2006

SSC	Numbers of businesses	% of businesses
Asset Skills	12,600	**5.9**
Automotive Skills	8,400	**3.9**
Cogent	1,600	**0.8**
ConstructionSkills	24,400	**11.3**
Creative & Cultural Skills	3,800	**1.8**
Energy & Utility Skills	1,600	**0.7**
e-skills UK	10,500	**4.9**
Financial Services Skills Council	4,500	**2.1**
GoSkills	2,100	**1.0**
Government Skills	1,900	**0.9**
Improve Ltd	1,200	**0.5**
Lantra	1,600	**0.8**
Lifelong Learning UK	3,000	**1.4**
People 1st	18,400	**8.6**
Proskills UK	2,600	**1.2**
Semta	6,100	**2.8**
Skillfast-UK	1,600	**0.7**
Skills for Care and Development	6,800	**3.1**
Skills for Health	5,300	**2.4**
Skills for Justice	300	**0.1**
Skills for Logistics	5,400	**2.5**
SkillsActive	2,800	**1.3**
Skillset	1,600	**0.8**
Skillsmart Retail	26,200	**12.2**
SummitSkills	5,700	**2.7**
Non-SSC	55,000	**25.6**
Total South West	**215,100**	**100.0**

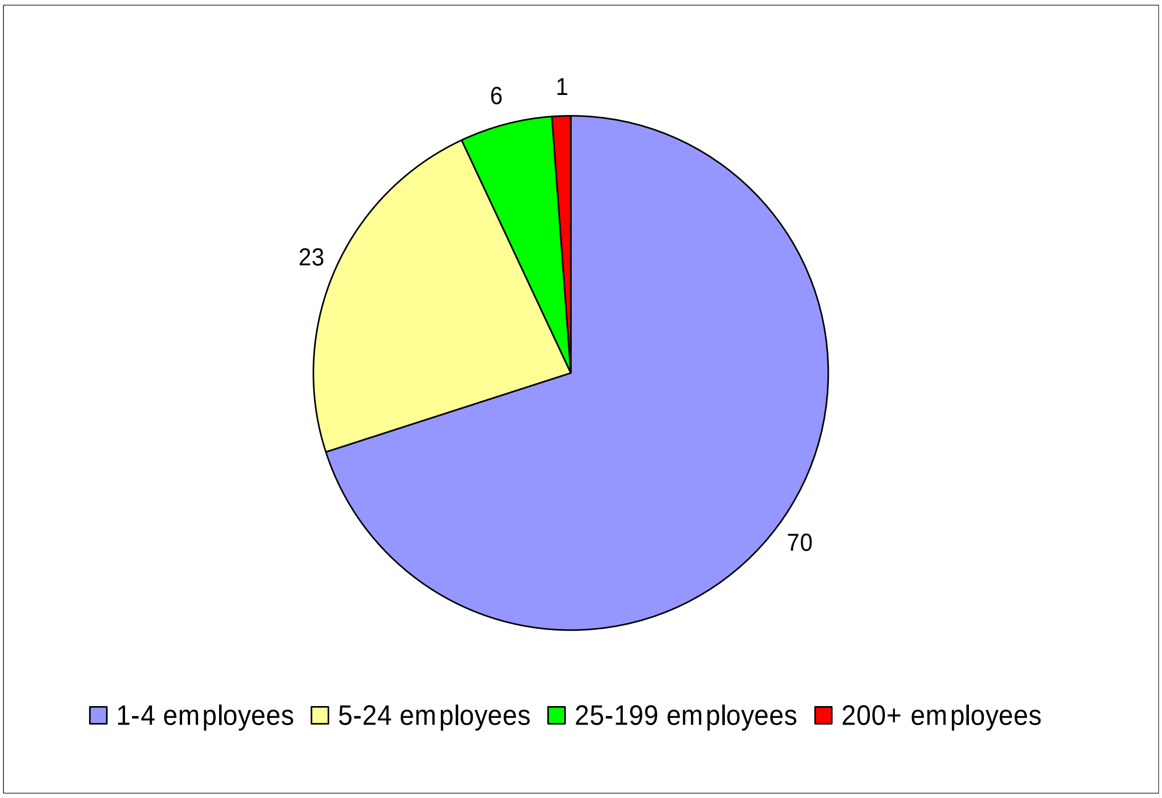
Source: ONS ABI 2006 (numbers may not add due to rounding)

The different average size of employers in each sector has important implications for strategies to promote skills development since small firms are far less likely to train staff, less likely to have structured approaches to training and more likely to have lower levels of awareness of the support mechanisms which are in place to help them develop their workforce skills.

Moreover, since small businesses are somewhat more prevalent in the South West than nationally (and especially so in the more rural parts of the region), this is an important consideration for key players involved in developing and delivering skills support.

The regional economy - in common with the UK - is heavily dominated by micro workplaces (up to 4 employees) which account for 70% of employers locally (150,900 establishments). Small employers (5-24 employees) account for 23% of workplaces (49,440), medium-sized employers account for 6% of the business base (13,590) and the remaining 1% (1,200 establishments) have over 200 employees:

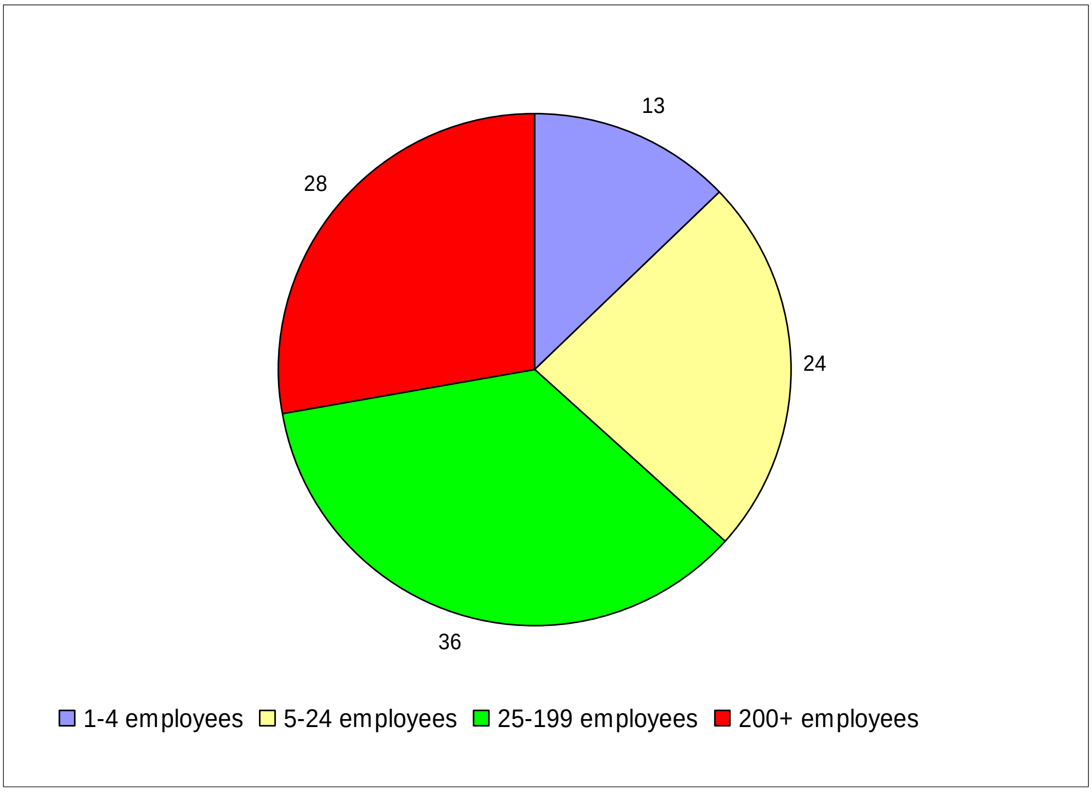
Figure 4: Proportion of employers by size-band in the South West



Source: ONS ABI 2006

Although micro and small employers predominate in terms of the business base accounting for more than 9 out of 10 workplaces, they employ only 13% and 24% of the workforce respectively. Large employers which account for only 1% of establishments actually employ 28% of the workforce, emphasising the importance of the region's 1,200 major employers to workforce and skills development.

Figure 5: Proportion of employment by size-band in the South West



Source: ONS ABI 2006

More detailed analysis of average workplace size by sector illustrates that the average workplace in the South West has 10 employees, but some are well below this average, thus:

- SummitSkills and Creative and Cultural skills have the lowest average numbers of employees, but e-skills UK has the highest proportion of micro workplaces with 90% of its business base employing between 1 and 4 employees.
- Of course, the public sector has many major employers in the region and it is unsurprising to note that Government Skills, Skills for Health and Skills for Justice tend to have the greatest number of large employers and largest average workplace size.
- Otherwise, manufacturers dominate the larger employers and Semta and Improve Ltd both have some of the largest employers in the region.

Figure 6: Proportion of employment by size-band and average number of employees per SSC

	Proportion of employment in each size-band				Average no. of employees
	1-4 employees	5-24 employees	25-199 employees	200+ employees	
SummitSkills	86.1	12.2	1.7	0.0	**4**
Creative & Cultural Skills	86.5	10.2	3.2	0.1	**4**
ConstructionSkills	83.6	13.8	2.5	0.1	**5**
Skillset	87.4	9.4	3.1	0.2	**5**
Asset Skills	83.9	13.8	2.0	0.3	**5**
e-skills UK	90.0	7.5	2.2	0.3	**5**
Automotive Skills	73.3	21.7	4.9	0.1	**6**
Lantra	66.9	27.9	5.1	0.1	**7**
Non-SSC	74.8	18.2	6.6	0.4	**8**
Skillfast-UK	72.5	22.1	5.0	0.4	**9**
People 1st	50.7	41.7	7.5	0.1	**10**
SkillsActive	67.5	22.9	9.2	0.4	**10**
Skillsmart Retail	65.3	29.5	4.6	0.7	**10**
Proskills UK	67.0	23.7	8.8	0.5	**11**
Skills for Logistics	72.9	18.8	7.6	0.7	**11**
GoSkills	67.6	23.5	7.8	1.1	**13**
Skills for Care and Development	41.2	42.5	16.1	0.3	**15**
Cogent	45.5	42.7	10.1	1.7	**17**
Energy & Utility Skills	52.1	36.1	10.7	1.2	**18**
Financial Services Skills Council	54.0	37.4	7.2	1.4	**18**
Semta	63.1	25.4	9.7	1.8	**21**
Lifelong Learning UK	59.2	28.9	9.2	2.6	**26**
Improve Ltd	45.6	34.8	16.2	3.5	**33**
Skills for Health	40.8	38.8	18.6	1.7	**35**
Government Skills	34.4	35.6	24.3	5.6	**55**
Skills for Justice	25.8	29.5	32.9	11.8	**79**

Source: ONS ABI 2006

Recent trends

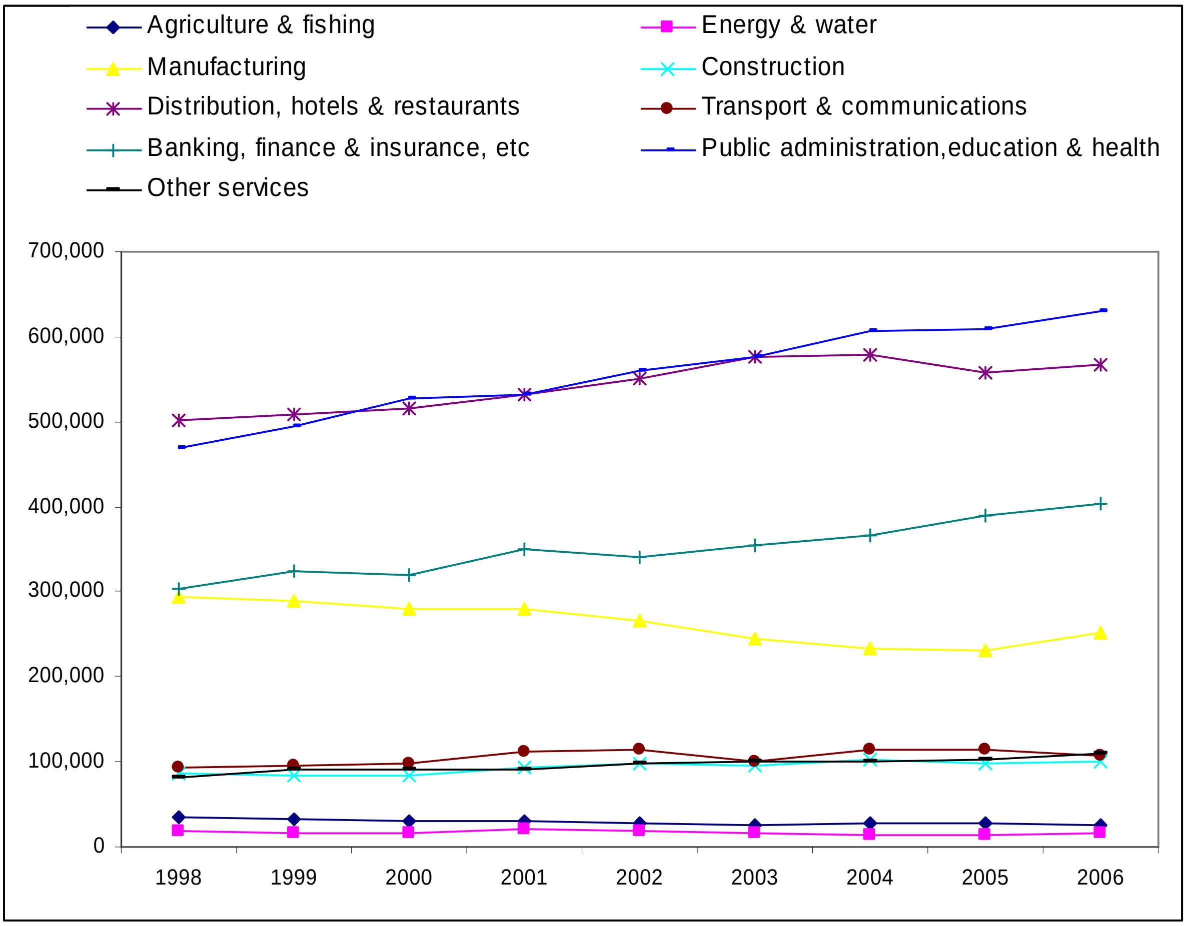
The past decade has witnessed rapid jobs growth within which different industries and occupations have had shifting fortunes. These shifts in demand have had important implications for the structure of local employment and, therefore, for the kinds of skills local employers require of the workforce. In essence, these longer term trends have seen continued growth in marketed services[4] and public administration and further decline in the manufacturing and primary sectors as illustrated below.

[4] Marketed services are essentially all services excluding non-marketed government services such as health, education and defence.

The data indicate that:

- Public administration, education and health overtook Distribution, hotels and restaurants as the region's major employer in 2003.
- Manufacturing employment has declined through time, although the trend appears to have bottomed out.
- Banking, finance, insurance and other business services have become ever more important to the region's employment profile and the sector accounts for the largest share of jobs outside the greater south east (London, South East and Eastern regions). Given the current turmoil in the financial markets, this may leave the region particularly vulnerable to job losses in the industry and the wider economy as the effects of the credit crunch ripple out.

Figure 7: Trends in jobs in the South West economy by broad sector 1998-2006



Labour Force Survey, 1998 - 4th quarter 2006, ONS, © Crown Copyright.

Economic uncertainty

This analysis is being written against a fast-moving backdrop of economic uncertainty and unprecedented global financial crisis. One year on from the collapse of Northern Rock, Britain's economy is still very fragile. The past year has seen a rapid loss of momentum and echoing the OECD and the European Commission, the CBI has added its voice to predictions of the first recession since 1992. As well as the downturn in the housing market and rising inflation, consumer confidence is low and the economic slowdown appears to be gathering pace.

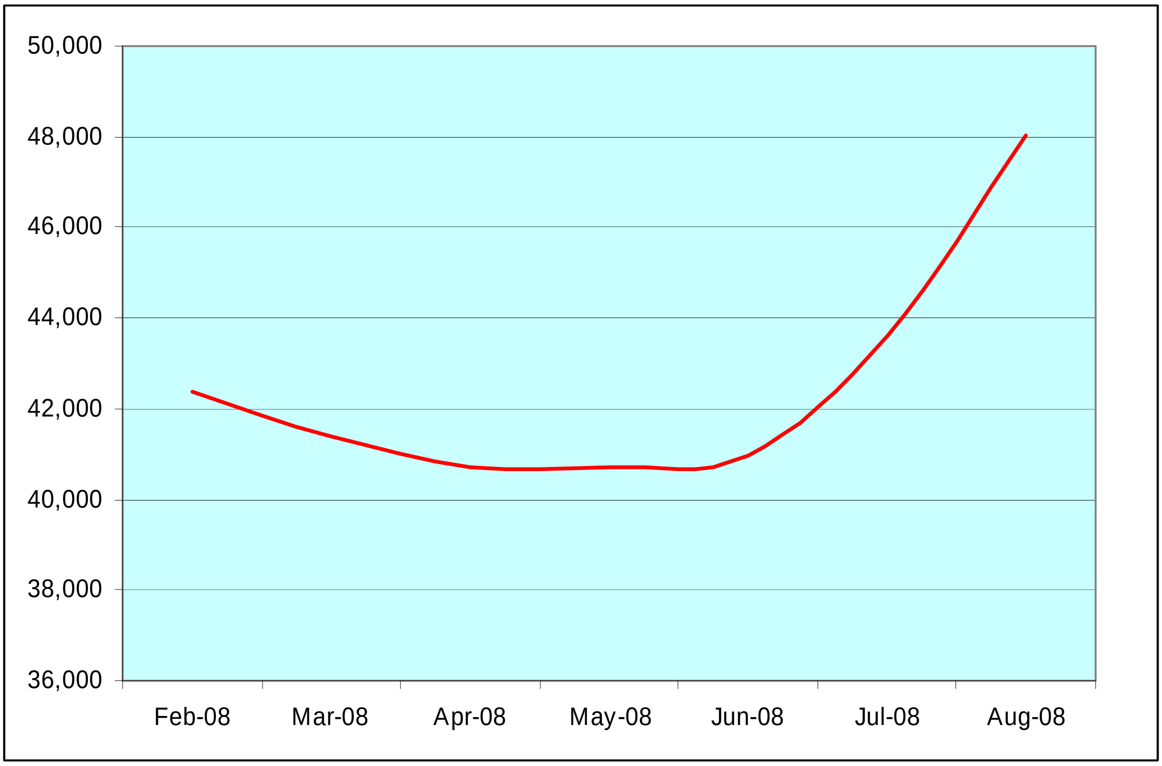
Latest unemployment figures for August 2008 showed that nationally the claimant count has risen by 32,500 in one month, the largest rise since December 1992. Long-term unemployment has risen disproportionately and youth unemployment is also up.

In the South West, the effects are more difficult to discern, no doubt reflecting lags in the impact of economic shocks. Thus, whereas national claimant count figures have been rising since November 2007, in the region the claimant count continued to fall until April 2008. In April to June 2008, the ILO unemployment rate for the South West was 3.8% (seasonally adjusted), up just 0.3% on the same period last year. The claimant count figures, which measure just the number of people claiming Jobseekers Allowance, are even lower at 1.6% or 48,000 claimants (August 08), but this total has been rising since April 2008 and has risen steeply by 4,400 in the last quarter[5]:

[5] ***Claimant count unemployment*** is the narrowest definition of unemployment including only those adults who are claiming Job-Seekers' Allowance (JSA). Claimant count unemployment tends to be used for sub-regional level analysis of unemployment as it provides a more robust measure of unemployment (because the reliability of unemployment data from the LFS begins to break down below regional levels).

ILO unemployment**:** this measure is defined by the International Labour Organisation and is the standard national and international definition of unemployment. It includes all those who are not in work, want a job, have actively sought work in the previous 4 weeks and are available to start work within the next fortnight, or, out of work and have accepted a job which they are waiting to start in the next fortnight.

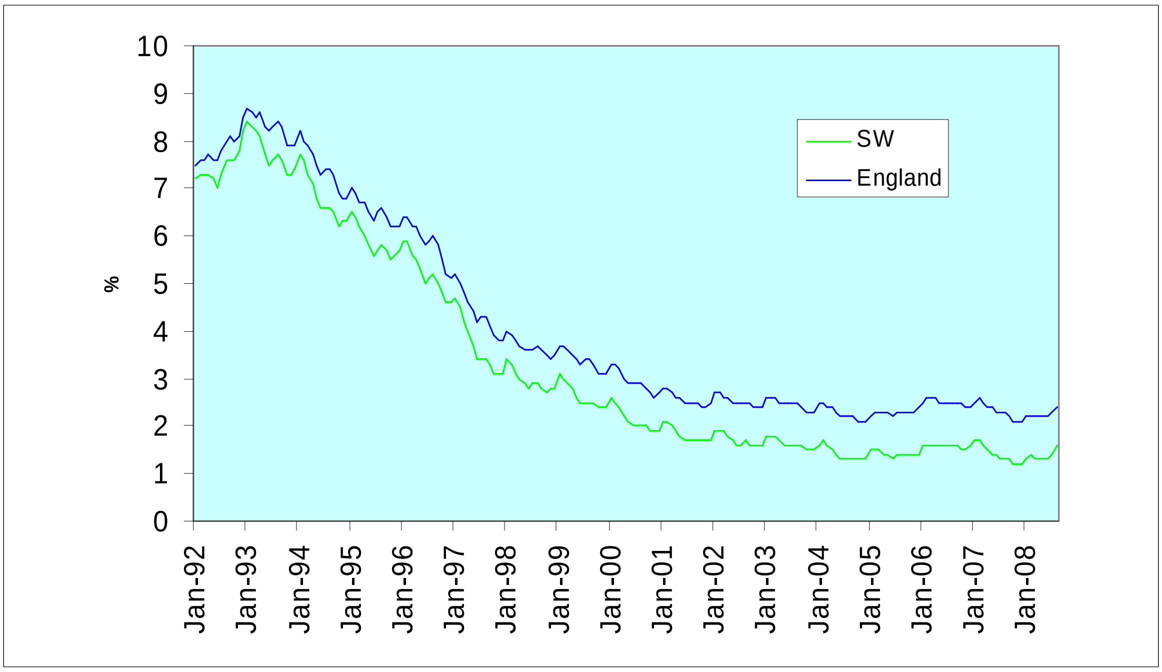
Figure 8: Recent trends in the Claimant Count, February 08 to August 08



Source: ONS Claimant Count to August 08 (unadjusted)

Despite these rises, on any measure, the numbers unemployed currently remain at very low levels:

Figure 9: Long term trends in the Claimant Count, 1992 - 2008



Source: ONS Claimant Count 1992 - August 08 (Unadjusted)

As yet, the tightening conditions are not being translated into business failures. Latest statistics from the Government's Insolvency Service show that while the trend in company liquidations has crept up in the first quarter of this year (over half to two-thirds voluntary and the rest compulsory), they remain lower than a year earlier and are running some way below the levels seen in the early 2000s.

Again, it is perhaps too early to judge but clearly, company and individual insolvencies are likely to rise if the region heads into an economic downturn. Clearly, it will be important for policy-makers to watch labour market and business trends closely to assess the extent to which short-term shocks are impacting on the longer-term projections of growth and structural change.

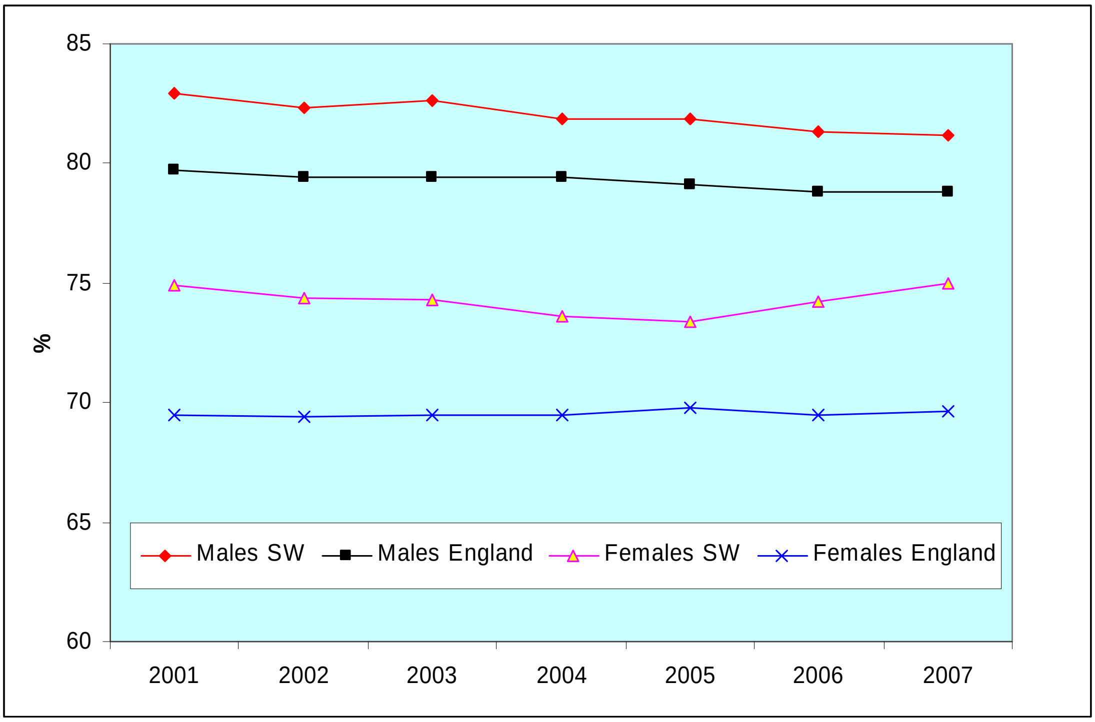
Characteristics of the workforce: gender

At present there are an estimated 1.4 million working men (53%) and 1.2 million working women (47%) in the region.

The impact of job gains and losses in different industries has had very different impacts on the employment of men and women through time. Since the early 1980s, and adjusting for the economic cycle, the female rate has continued its longer-term upward trend, while the male rate has at best arrested its longer term downward trend. The South West is no exception to these broader trends and the employment of women in the workforce has been rising steadily through time. Currently the region has the highest female employment rate in England which at 74.0% is 4.6% higher than the national average.

Moreover, while the male rate of employment in the region has fallen by 0.7% in the last three years the female rate has held up and is now 1.6% higher than it was in 2005.

Figure 10: Trends in the employment rates of men and women: South West and England compared



Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

By sector there are wide variations in the type of industry in which men and women are employed:

- ConstructionSkills is the most male-dominated and men make up 90% of its workforce. Others with especially high proportions include Energy and Utility Skills (83%), Semta (82%) Proskills UK (77%) and Skills for Logistics (77%)
- In contrast, all the service sector SSCs have predominantly female workforces.

- SSCs where women particularly pre-dominate include Skills for Care and Development (86%), Skills for Health (80%) and Skillsmart Retail (62%).
- Numerically, the largest numbers of men (216,872) are employed by employers covered by Construction Skills which accounts for 17% of all men's jobs. This is followed by Semta which employs 125,368 men, making up a further 10% of all male employment.
- 23% of women are employed in sectors not covered by any Sector Skills Council. Of the jobs covered by Sector Skills Councils, Skillsmart Retail accounts for the greatest number of women's jobs (156,891 or 14%) with health-related work accounting for a further 12% in Skills for Health (133,602 jobs) and 9% in Skills for Care and Development (97,533).

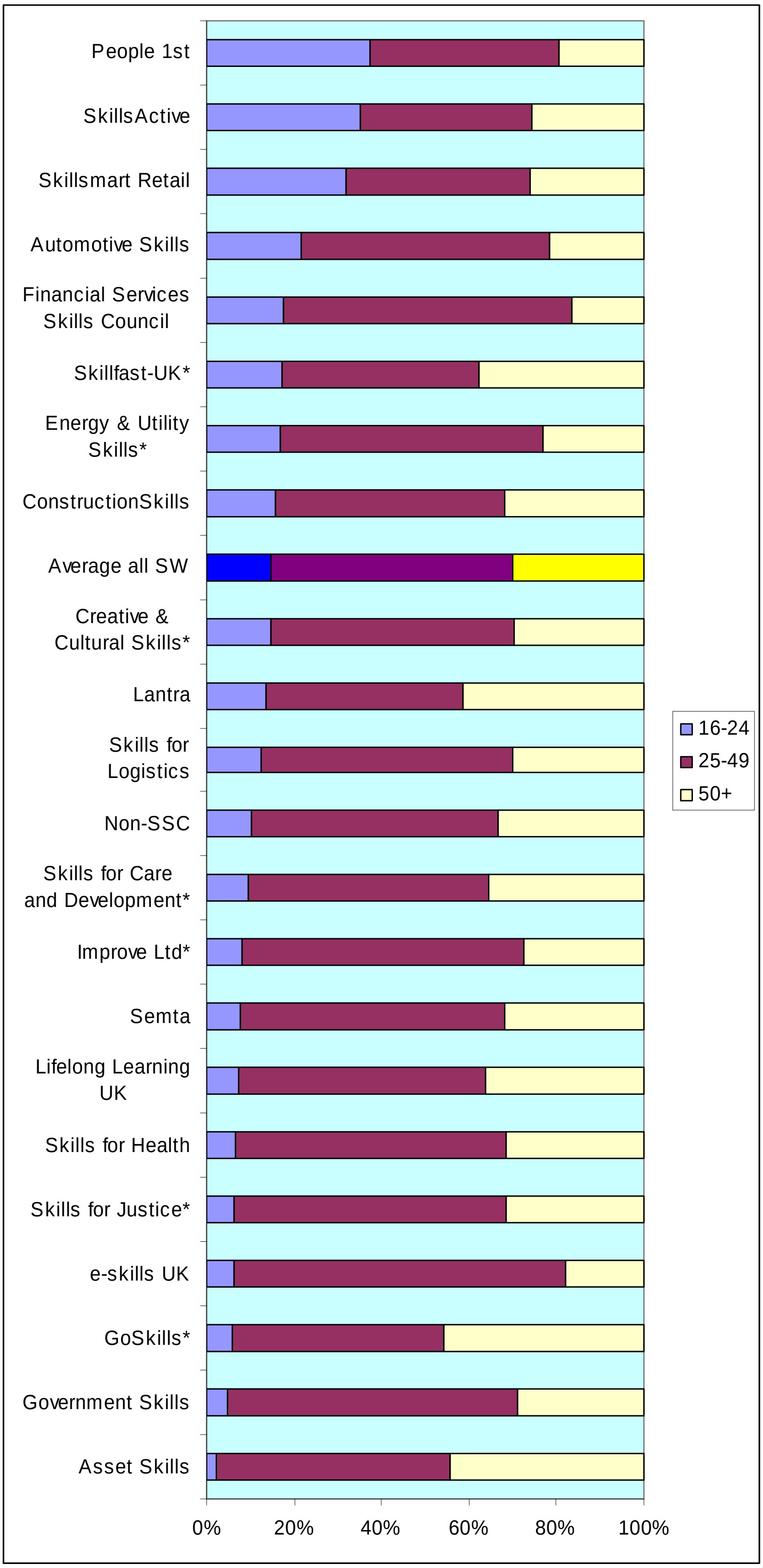
Characteristics of the workforce: age

The workforce is ageing and projections suggest that there will be a reduction in the number of available younger people aged 15-19 (who are projected to be down by 22,900 or 7% over the next 10 years) and a rise in the proportion of the population who are of retirement age (up 263,500 or 24%). From the perspective of the local labour market, the significance of these forecasts is that to an increasing extent, employers will need to meet their recruitment needs from older workers.

By sector this will be especially important in People 1st, SkillsActive and Skillsmart Retail where young people make up around one third of the workforce.

At the other end of the spectrum, some sectors will face particular issues in attracting sufficient young people to replace the large numbers of employees heading for retirement. In Asset Skills (44.5%), GoSkills (45.7%) and Lantra (41.5%) more than 4 in 10 employees are aged over 50:

Figure 11: Age of the South West workforce by Sector



* Sample bases below 100: Note: some sectors with < 50 sample bases excluded
Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

Full time and part time employment

As might be expected from the high employment rate of women in the South West, part-time work is more widespread in the region (28% of all jobs) than nationally (24%). The flexibility offered by part-time work and its prevalence are considered to be factors in the high employment rates of the region. On the downside, it has been cited as contributory factor in the regions' productivity gap with London and the Greater South East.[6]

Although part-time working has been on a long-term rising trend, more recent figures since the turn of the century show the rate to have remained broadly stable, fluctuating between 26% and 28% in the last seven years.

Most part time jobs are taken by women and whereas 47% of women work part time in the region only 11% of men do so:

Figure 12: Full and part-time employment

Employment status	Numbers	% of employment
Male full-time	1,153,200	89%
Male part-time	147,700	11%
All males	**1,300,900**	**100%**
Female full-time	577,500	53%
Female part-time	515,500	47%
All females	**1,093,000**	**100%**
All full-time	1,730,700	72%
All part-time	663,200	28%
All employment	**2,393,900**	**100%**

Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

By sector, fewest opportunities for part-time work are in Energy and utility skills (5%) Cogent (7%) Semta (7%) and Skills for Logistics (9%). In each of these sectors men account for 2 out of 3 of the workforce.

Part-time work is most common in the health care and tourism sectors where it accounts for 47% of jobs in Skills for Care and Development, 45% in People 1st and 42% in Skills for Health.

Workforce qualifications

Skills are one of the drivers of competitiveness and productivity and on this measure the South West is relatively well placed. It has one of the most highly qualified workforces in the country, after London and the South East. 1 in 3 of its workforce is qualified to degree level and at the other end of the spectrum the region has the lowest proportion of workers with no qualifications of any region:

[6] South West Observatory (2008) State of the South West 2008 available at http://www.swo.org.uk/observatory/links-1/state/state-of-the-south-w-1.shtm

Figure 13: Qualifications of the workforce by region

Qualifications[7]	L4	L3	L2	< L2	No qualifications	All
Eastern	29.3	19.0	22.0	20.6	9.1	100.0
E. Midlands	29.3	19.9	21.9	19.7	9.3	100.0
London	45.4	14.3	16.4	16.2	7.7	100.0
North East	29.6	21.7	24.3	16.4	8.0	100.0
North West	30.6	20.7	22.4	17.3	8.9	100.0
South East	34.5	19.7	21.0	17.8	7.0	100.0
South West	**32.4**	**21.2**	**21.9**	**18.4**	**6.1**	**100.0**
West Midlands	29.4	19.4	22.1	18.2	10.9	100.0
Yorks & Humbs	28.2	20.6	22.6	19.6	8.9	100.0
England	**33.0**	**19.3**	**21.2**	**18.2**	**8.3**	**100.0**

Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

Even though proportions with no qualifications are low, the proportion of the workforce qualified to below Level 2 is above average and together these two groups account for **1 in 4** of the working age population. This equates to **586,440 people** of working age in the South West who qualify for an entitlement to a first full Level 2 qualification:

Figure 14: Qualifications of the workforce in the South West: numbers

Highest qualification	Numbers
L4 +	775,500
L3	508780
L2	523580
<L2	440,640
No qualifications	145,800
	2,394,300

Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

[7] See explanation of NVQ equivalents at Annex 2

By gender, women are better qualified than men, with 33.7% qualified to Level 4 and above compared with 31.3% of men. Far fewer proportions possess no qualifications than average but at degree level (L4) both genders are a little below the national picture:

Figure 15: Qualifications of the men and women in the workforce; South West and England compared

	Men SW (Nos.)	Men SW (%)	Men England (%)	Women SW (Nos.)	Women SW (%)	Women England (%)
Level 4 +	**406,800**	31.3	31.5	**368,700**	33.7	34.9
Level 3	**310810**	23.9	21.2	**197,970**	18.1	16.9
Level 2	**264160**	20.2	20.4	**259,420**	23.7	22.2
<Level 2	**238530**	18.3	18.0	**202,110**	18.5	18.5
No qualifications	**80,500**	6.2	9.0	**65,200**	6.0	7.5
Total	**1,300,800**	**100.0**	**100.0**	**1,093,400**	**100.0**	**100.0**

Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS, © Crown Copyright.

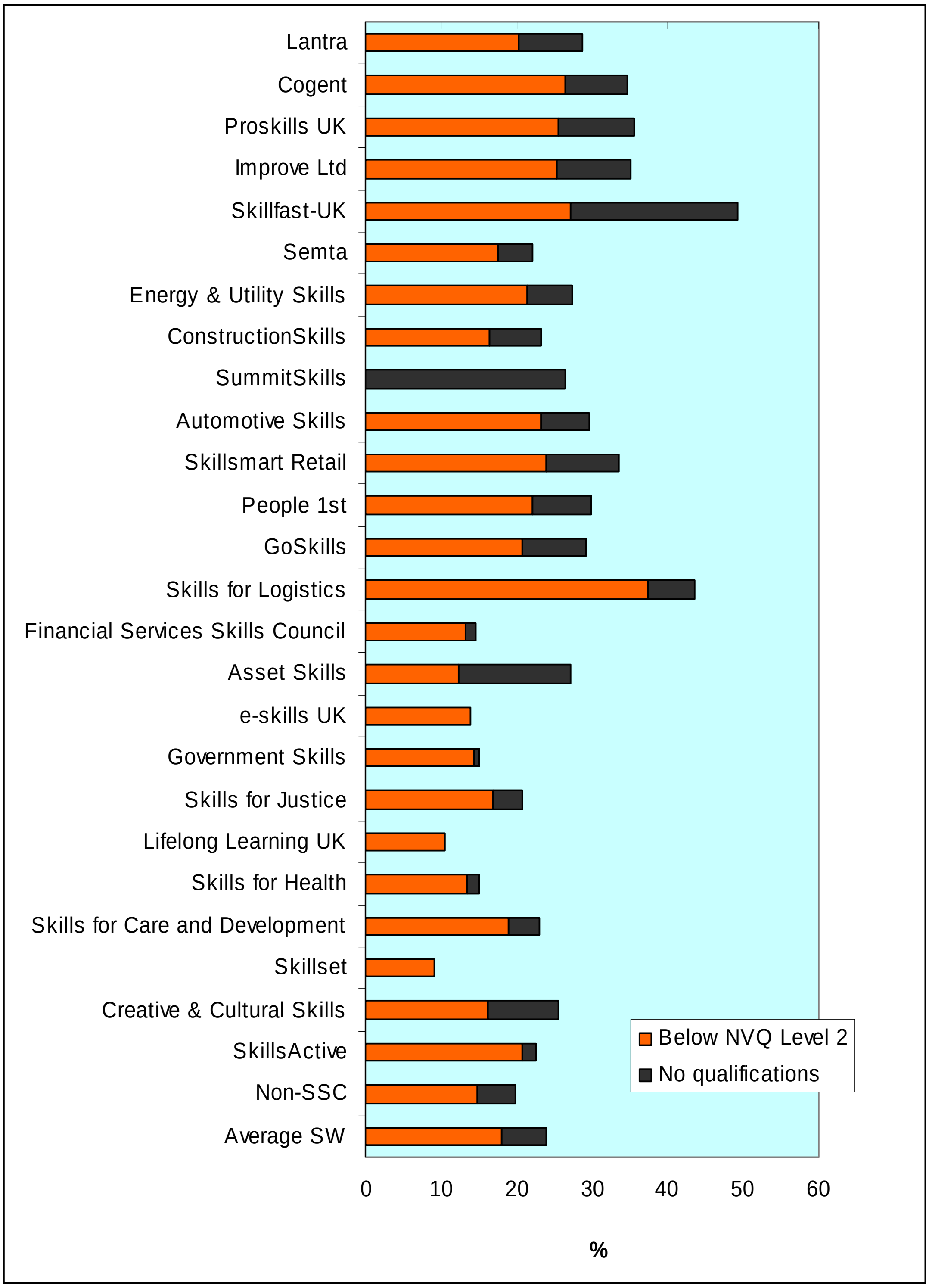
By sector, as may be expected, highest qualifications are to be found in those industries where professionals form a significant part of the workforce. This is predominantly in public sector organisations including Lifelong Learning UK (61.1%), Skills for Health (58.1%) and Government Skills (47.8%). In the private sector e-skills UK (50.4%) and Creative and Cultural Skills (57.7%) both have majorities of their workforce qualified to at least degree level.

Since one of the main aims of Train to Gain is to enable workers to gain either their first or approved 'additional' Level 2 or 3 qualifications[8] it is useful to explore the scale of the eligible populations by SSC:

- In Skillfast-UK, around 1 in 2 of the workforce is qualified to below Level 2 (around 7,000 people).
- Skills for Logistics has fewer staff with no qualifications but nevertheless, 44% or (76,000 people) are qualified to below Level 2.
- Skillset (9.1%) and Lifelong Learning UK (10.4%) have the lowest proportions of people with low skills, nevertheless because of its large workforce there are still more than 8,000 people in Lifelong Learning UK qualified to below Level 2.
- By far the largest numbers of people with low skills by sector are to be found in Skillsmart Retail where a quarter of a million staff do not possess skills above Level 2 and in Construction Skills (242,000 staff). Between them, these two sectors account for 1 in 4 of all the low skilled workers to be found in the region.

[8] Note: New flexibilities introduced in August 2008 include some relaxation on 'first' Level 2 qualifications and targets for provision at Levels 3/4 and above again have a relaxation on 'firstness' subject to the qualifications being approved by the SSC.

Figure 16: Proportions in the workforce qualified to below Level 2 by Sector



Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS , © Crown Copyright.

Analysis of the numbers involved is instructive, and shows that 1 in 4 of all low skilled workers are employed in just two sectors – Skillsmart Retail (15% of total) and ConstructionSkills (10% of total):

Figure 17: Numbers in the workforce qualified to below Level 2 by Sector

SSC	Nos. with below Level 2	%
Asset Skills	13,575	2.4
Automotive Skills	17,572	3.1
Cogent	8,231	1.5
ConstructionSkills	56,210	10.0
Creative & Cultural Skills	7,688	1.4
Energy & Utility Skills	7,516	1.3
e-skills UK	8,033	1.4
Financial Services Skills Council	15,819	2.8
GoSkills	11,854	2.1
Government Skills	19,954	3.6
Improve Ltd	10,326	1.8
Lantra	14,114	2.5
Lifelong Learning UK	8,394	1.5
People 1st	41,494	7.4
Proskills UK	8,243	1.5
Semta	33,719	6.0
Skillfast-UK	7,022	1.3
Skills for Care and Development	26,142	4.7
Skills for Health	25,306	4.5
Skills for Justice	5,721	1.0
Skills for Logistics	33,002	5.9
SkillsActive	6,119	1.1
Skillset	899	0.2
Skillsmart Retail	84,828	15.1
SummitSkills	515	0.1
Non-SSC	88,017	15.7
All	**560,312**	**100.0**

Source: Labour Force Survey, 4th quarter 2004 to 2007, ONS , © Crown Copyright.

Findings from the National Employers Skills Survey 2007

Background: The survey and definitions

The National Employers Skills Survey 2007 was commissioned by the Learning and Skills Council, Department of Innovation, Universities and Skills and Sector Skills Development Agency to provide comprehensive and up to date information on the recruitment, skills and workforce development issues facing employers in England. Over 79,000 employers were interviewed, including 8,454 employers in the South West.

A number of terms are used in relation to recruitment in this document, each of which has specific meanings:

Recruitment difficulties are normally defined through the scale and nature of vacancies which employers find hard-to-fill (HtFVs).

Hard to fill vacancies in turn can have many causes, such as uncompetitive pay and conditions, unsocial hours and so on, but some are caused primarily by there not being enough suitably qualified applicants for the position, these are referred to as skill shortage vacancies. (SSVs)

Skills gaps are different and refer not to difficulties with prospective employees but the extent to which employers perceive their existing workforce as not being fully proficient.

Labour demand: vacancies

At the time of survey 17% of establishments in the South West reported vacancies, a figure within 1% of the national average (18%) and similar to most other regions outside London.

Between them employers had 58,534 vacancies which appears sizeable but actually represents just 2.7% of employment in the region; a figure which is a little down on 2005 (2.9%) suggesting that recruitment has slowed in recent years.

For comparative purposes, in order to account for the varying sizes of different sectors it is useful to use density measures, i.e. the proportion of vacancies by employment. This allows for the effects of size and sector to be distinguished and on this measure it can be seen that in all sectors the proportion of employment accounted for by vacancies is low.

Figure 18: Vacancies as a proportion of employment by SSC

	Unweighted base	Total Number of vacancies	Vacancies as % of employment
England	**79,018**	**619,683**	**2.8**
South West	**8,454**	**58,534**	**2.7**
Lantra	572	1,485	2.8
Cogent	182	1,086	3.5
Proskills	215	498	1.9
Improve	147	786	2.1
Skillfast-UK	183	341	2.3
SEMTA	341	2,147	1.6
Energy & Utility Skills	*70*	*339*	*1.3*
ConstructionSkills	536	3,724	3.4
SummitSkills	219	439	2.4
Automotive Skills	378	1,740	3.3
Skillsmart Retail	821	6,646	2.7
People 1st	641	6,562	3.8
Goskills	166	1,031	3.5
Skills for Logistics	222	1,398	2.5
Financial Services	217	1,629	2.1
Asset Skills	312	1,883	2.8
e-skills UK	291	2,009	4.1
Government Skills	*30*	*587*	*1.3*
Skills for Justice	*38*	*325*	*1.3*
Lifelong Learning UK	257	1,745	2.2
Skills for Health	242	3,825	2.1
Skills for Care and Development	411	3,342	3.4
Skillset	126	121	1.4
Creative and Cultural	281	798	4.3
SkillsActive	207	861	3.1
Non-SSC employers	1,349	13,187	2.6

Highest nos. of vacancies	Above average ratio by more than 0.5%	Below average ratio by more than 1%	*Source: NESS2007*

Note: The base numbers for Energy and Utility Skills, Government Skills and Skills for Justice are low and findings for these SSCs throughout the report may be unreliable.

Key points to note are that:

- Although the Creative and Cultural sector has fewer than one thousand vacancies, relative to its share of employment this is the highest proportion of vacancies of any sector (4.3%), equivalent to 1 vacancy for every 25 employees.
- In contrast, although Skillsmart Retail has the highest number of vacancies of any SSC, this is average relative to its sizeable employment total.
- In all, eight SSCs, have above average number of vacancies as a proportion of employment:

  Creative and Cultural (4.3%)
  e-skills (4.1%)
  People 1st (3.8%)
  Goskills (3.5%)
  Cogent (3.5%)
  Skillset (3.4%)

Construction Skills (3.3%)
Automotive Skills (3.3%)

- The density of recruitment is significantly lower than average in Proskills UK (1.9%), Energy and Utility (1.3%), Government Skills and Skills for Justice (1.3% respectively).

Recruitment difficulties: hard to fill vacancies

Of course, in many instances, vacancies can be a sign of growth and are not in themselves an issue unless employers have difficulty filling them. Overall, 20,453 vacancies were identified by employers as hard to fill, equivalent to 35% of all vacancies. This is greater than the national average of 30% and the largest proportion of any region.

This figure is higher than the proportion of hard to fill vacancies recorded in 2005 (31%) and contrary to wider trends which show hard to fill vacancies falling. However, to put this figure in context, as a proportion of employment, hard to fill vacancies are at a historic low and in no sector in the region do they account for more than 2% of employment.

Figure 19: Number of hard to fill vacancies and HtFVs as a proportion of employment by SSC

	Unweighted base	Total number of HtFVs	HtFV as % of emp	HtFVs as % of all vacancies
England	**79,018**	**183,472**	**0.8**	**30%**
South West	**8,454**	**20,453**	**0.9**	**35%**
Lantra	572	825	1.5	56%
Cogent	182	348	1.1	32%
Proskills	215	193	0.7	39%
Improve	147	78	0.2	10%
Skillfast-UK	183	129	0.9	38%
SEMTA	341	859	0.7	40%
Energy & Utility Skills	*70*	*115*	0.4	*34%*
ConstructionSkills	536	1912	1.7	51%
SummitSkills	219	224	1.2	51%
Automotive Skills	378	600	1.1	34%
Skillsmart Retail	821	1455	0.6	22%
People 1st	641	2664	1.5	41%
Goskills	166	498	1.7	48%
Skills for Logistics	222	321	0.6	23%
Financial Services	217	538	0.7	33%
Asset Skills	312	543	0.8	29%
e-skills UK	291	656	1.3	33%
Government Skills	*30*	*336*	0.8	*57%*
Skills for Justice	*38*	*20*	0.1	*6%*
Lifelong Learning UK	257	353	0.5	20%
Skills for Health	242	1760	1.0	46%
Skills for Care	411	1026	1.1	31%

and Development				
Skillset	126	54	0.6	45%
Creative and Cultural	281	363	2.0	45%
SkillsActive	207	230	0.8	27%
Non-SSC employers	1,349	4,353	0.9	33%

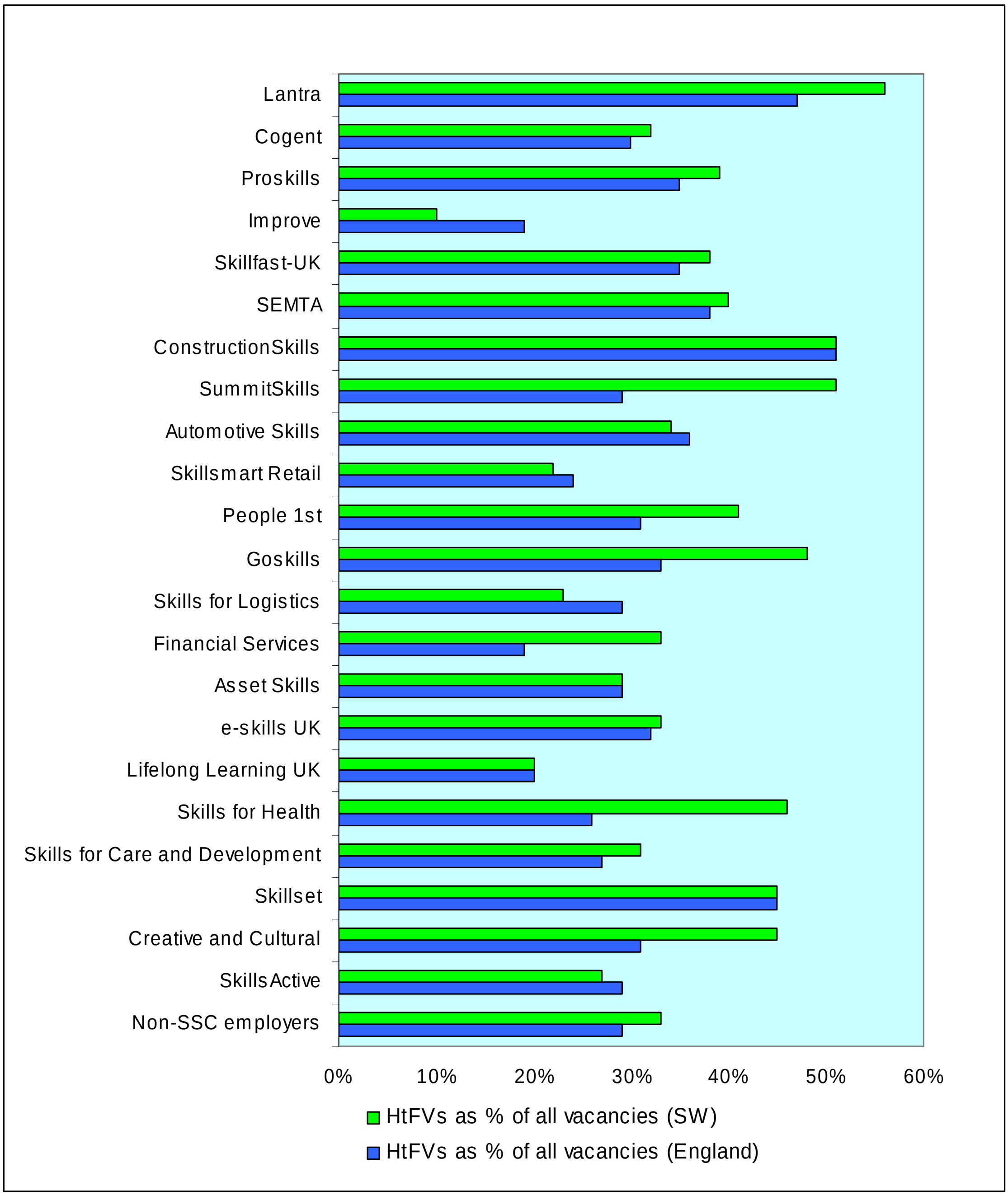
High density of vacancies **and** vacancies are hard to fill	Low density of HtFVs but high proportions hard to fill	*Source: NESS2007*

- More detailed analysis shows that:
- A number of sectors have both a high density of vacancies and find them hard to fill, including ConstructionSkills (1912 HtFVs) where they account for over half of all vacancies, People 1st (2664 HtFVs), Goskills (498 HtFVs) and Creative and Cultural (363 HtFVs).
- Further, it is noticeable that some of the sectors with high levels of HtFVs - Creative and Cultural, Skillset and People 1st – are those identified by the Regional Economic Strategy as being 'key sectors' for growth.
- Improve Ltd has a very low density of HtFVs and far less difficulty than average in filling them.
- In Summitskills, Skills for Health and Skillset, hard to fill vacancies are low as a proportion of employment but are more difficult than average to fill.
- A comparison of the proportion of employers in the South West finding vacancies hard to fill with the national average shows that for most SSCs, recruitment difficulties are on a par with the national situation. But for five SSCs it is clear that employers in the South West are having far greater difficulty than average, these are:

	South West	**England**
SummitSkills	51%	29%
People 1st	41%	31%
Goskills	48%	33%
Financial Services	33%	19%
Skills for Health	46%	26%

- Only employers in Improve Ltd (10% vs 19%) and Skills for Logistics (23% vs 29%) experienced significantly fewer than national average hard to fill vacancies:

Figure 20: Percent of employers with hard to fill vacancies by SSC; South West and England compared

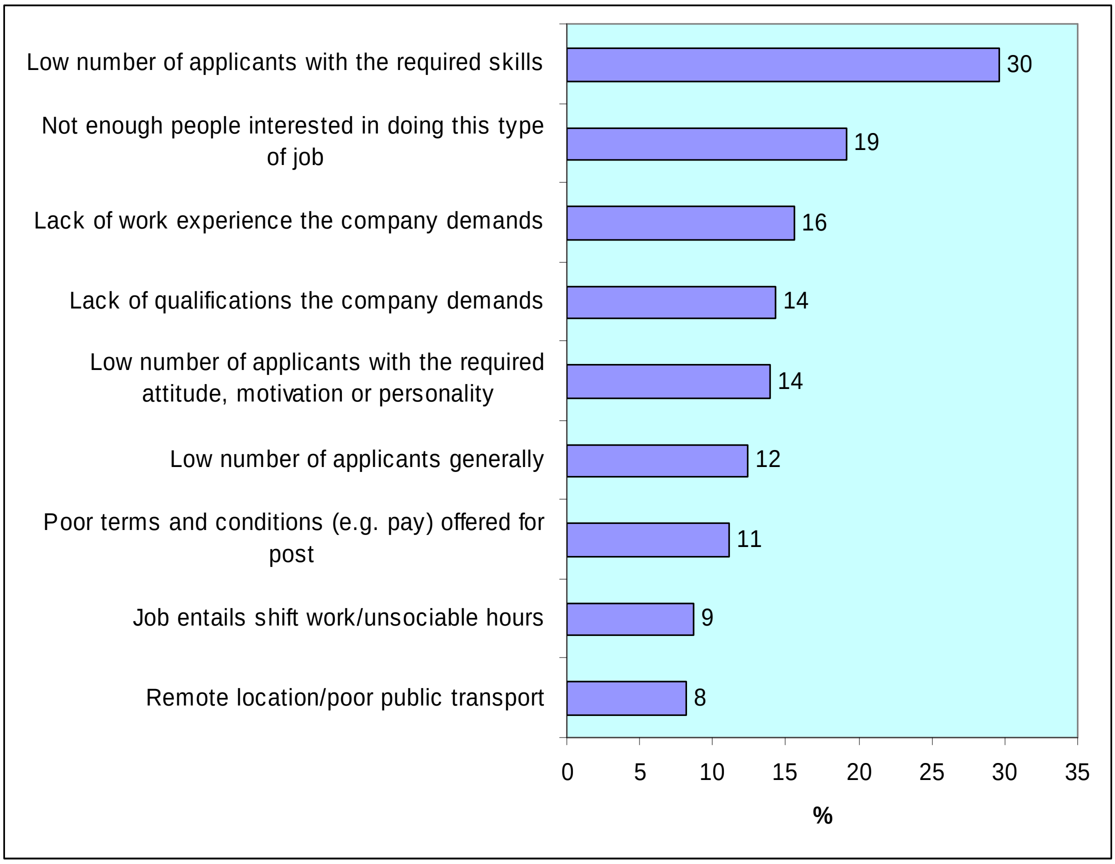


Note: Sample sizes for Energy and Utility skills, Government Skills and Skills for Justice: too small for inclusion

Source: NESS2007

Employers were asked to give the reasons as to why they thought their vacancies were difficult to fill. As can be seen, employers were more likely to identify labour market issues such as low skills, lack of interest, qualifications and experience together with a lack of personal attributes and 'soft skills' rather than poor terms or conditions.

Figure 21: Main reasons given for difficulty in filling vacancies



Source: NESS2007

Skill shortage vacancies

Of the hard to fill vacancies identified, 62% of them were considered hard to fill because of skill shortages. In other words, candidates were believed to lack the appropriate skills, qualifications or experience. Again, density measures allow for differences by SSC to be discerned regardless of the size of each sector.

- In terms of absolute numbers of SSVs, (apart from employers not covered by an SSC) two SSCs account for more than 1 in 5 of all SSVs in the region – ConstructionSkills and People 1st.
- Generally, the primary, manufacturing and production sectors (Lantra, ConstructionSkills, SummitSkills and SEMTA) are more likely to ascribe their recruitment difficulty to skill shortages than service sector employers.
- Although People 1st has a high number of SSVs, the proportion ascribed to skill shortages is below average.
- Employers covered by Improve Ltd, Government Skills and Skills for Justice have relatively fewer problems in finding suitably skilled applicants for their vacancies.
- Using density ratios, the analysis shows that SSVs as a proportion of all employees are a more significant issue in ConstructionSkills, Goskills, Creative and Cultural, Lantra, and e-skills UK.

Figure 22: Skill shortage vacancies as a proportion of all vacancies

	Total Number of vacancies	SSVs	% of vacancies that are SSVs	SSVs per 1000 employees
England	**619,683**	**130,004**	**21%**	**6**
South West	**58,534**	**12,734**	**22%**	**6**
ConstructionSkills	3724	1542	41%	14
Goskills	1031	351	34%	12
Creative and Cultural	798	219	27%	12
Lantra	1485	577	39%	11
e-skills UK	2009	511	25%	10
SummitSkills	439	160	36%	9
Automotive Skills	1740	483	28%	9
People 1st	6562	1332	20%	8
Cogent	1086	225	21%	7
Skillset	121	48	40%	6
SEMTA	2147	723	34%	6
Skillfast-UK	341	93	27%	6
Non-SSC employers	13187	3121	24%	6
Skills for Care and Development	3342	594	18%	6
Financial Services	1629	361	22%	5
Proskills	498	111	22%	4
Skills for Health	3825	706	18%	4
SkillsActive	861	125	15%	4
Energy & Utility Skills	*339*	69	20%	3
Lifelong Learning UK	1745	228	13%	3
Skillsmart Retail	6646	790	12%	3
Asset Skills	1883	162	9%	2
Skills for Logistics	1398	117	8%	2
Improve	786	46	6%	1
Government Skills	*587*	32	5%	1
Skills for Justice	*325*	8	2%	0

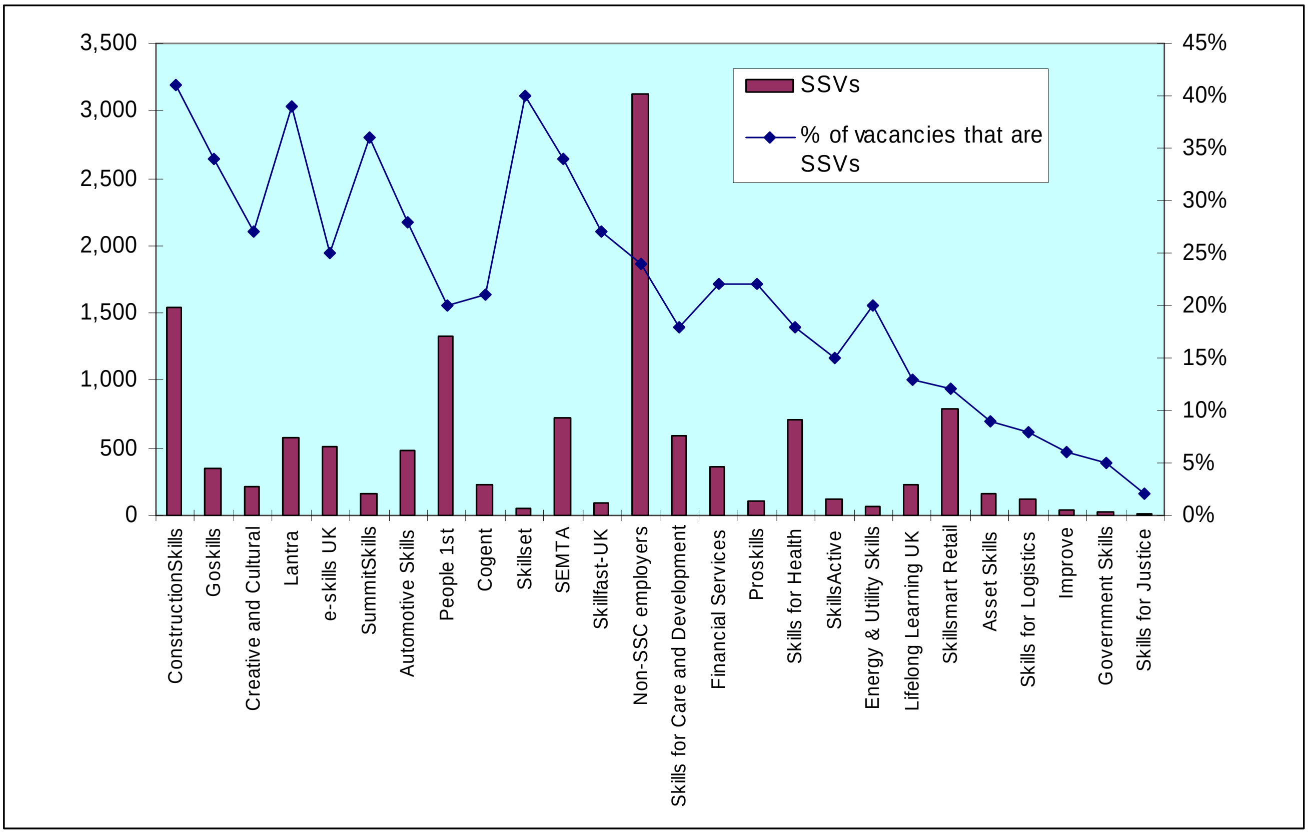
Source: NESS2007

In all, there are two different issues facing sectors in terms of skills and the labour market:

(i) sectors where there are high volumes of recruitment and hence relatively large volumes of skills shortages; and

(ii) those where there are skills shortages even where volumes of recruitment are low.

Figure 21: Volume of skill shortage vacancies and proportion of vacancies related to skill shortages



Source: NESS2007

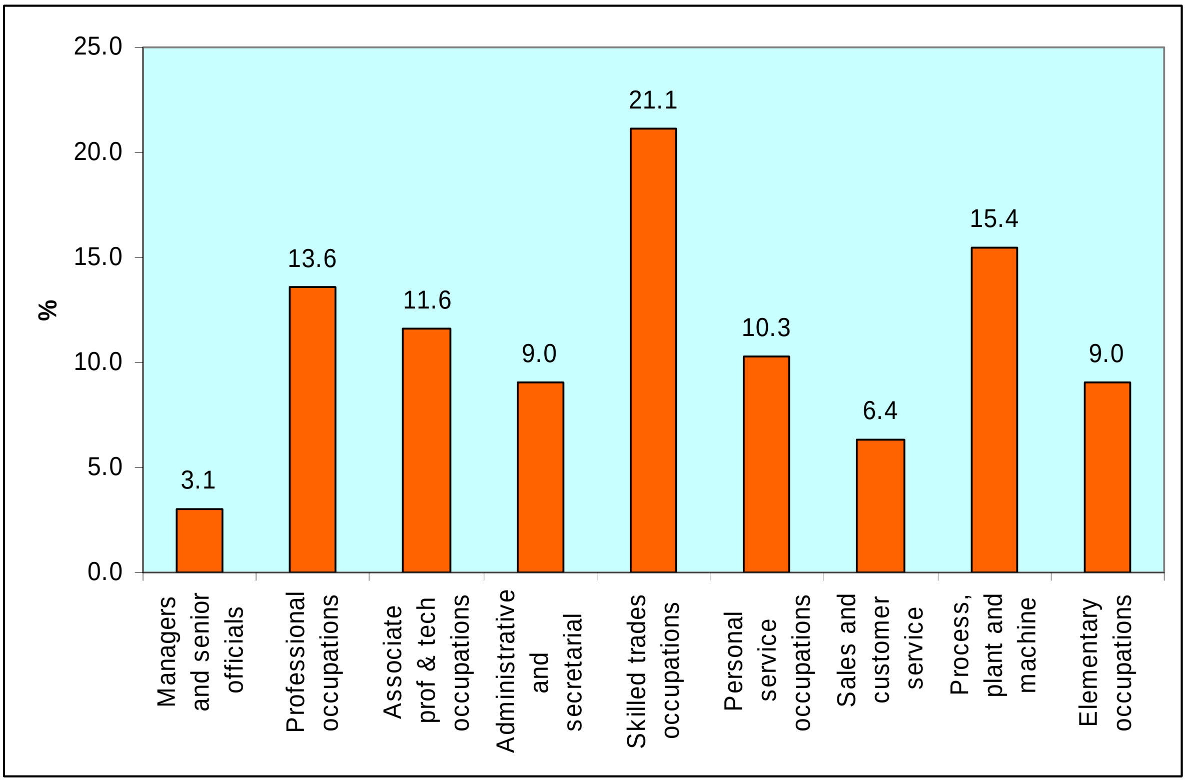
> Employers suffering both a high density and high volume of SSVs in the South West include ConstructionSkills and SEMTA, a picture consistent with the national findings.

> Industries where the density of SSVs is high but where there are relatively few vacancies include GoSkills, Lantra, SummitSkills and Skillset.

Closer analysis of the occupations those SSCs are finding difficult to recruit show that their SSVs centre on a number of occupations:

- 1 in 5 skills shortage vacancies are for skilled trade occupations
- Process, plant and machine operatives form the next largest group

Figure 23: Skill shortage vacancies by occupation (% of total)



Source: NESS2007

By SSC skill shortage vacancies are concentrated in some particular occupational groups:

Figure 24: Skill shortage vacancies by occupation and SSC

SSCs	Number of skills shortage vacancies (prompted or unprompted)	Percentage of vacancies in each occupation								
		Managers	Professionals	Associate professionals	Administrative/clerical staff	Skilled trades occupations	Personal services staff	Sales and customer services staff	Machine operatives	Elementary staff
Lantra	**575**		13	2	1	49	11		9	15
Cogent	**290**		93		4			2		
Skillfast-UK	**112**	12			11			10	68	
SEMTA	**611**	4	14	31		28		4	19	
ConstructionSkills	**1,483**	1	27	4	1	58			3	7
SummitSkills	**168**	5	10			69				15
Automotive Skills	**516**	2	3	11	1	51		13	13	5
Skillsmart Retail	**798**	5	1	6	15	8		59	6	
People 1st	**1,367**	7			4	32	3	1	6	46
Goskills	**265**		6	6		2			86	
Financial Services	**317**		39	7	54					
Asset Skills	**233**	6	18	26	8	2	23			18
e-skills UK	**426**	3	37		44			10		5
Lifelong Learning UK	**210**	12	31	21	3		29	4		
Skills for Health	**866**	2	6	35	2		48			
Skills for Care and Development	**566**		5	21			74			
Creative and Cultural	**213**	20	7	29	24	2	2	5		10
SkillsActive	**119**			4	10	8	59	13		6
Non-SSC employers	**2,945**	1	11	14	13	13	4	3	35	5
Total	**12,477**	**3**	**14**	**12**	**9**	**21**	**10**	**6**	**15**	**9**

Occupations which account for more than 25% SSVs

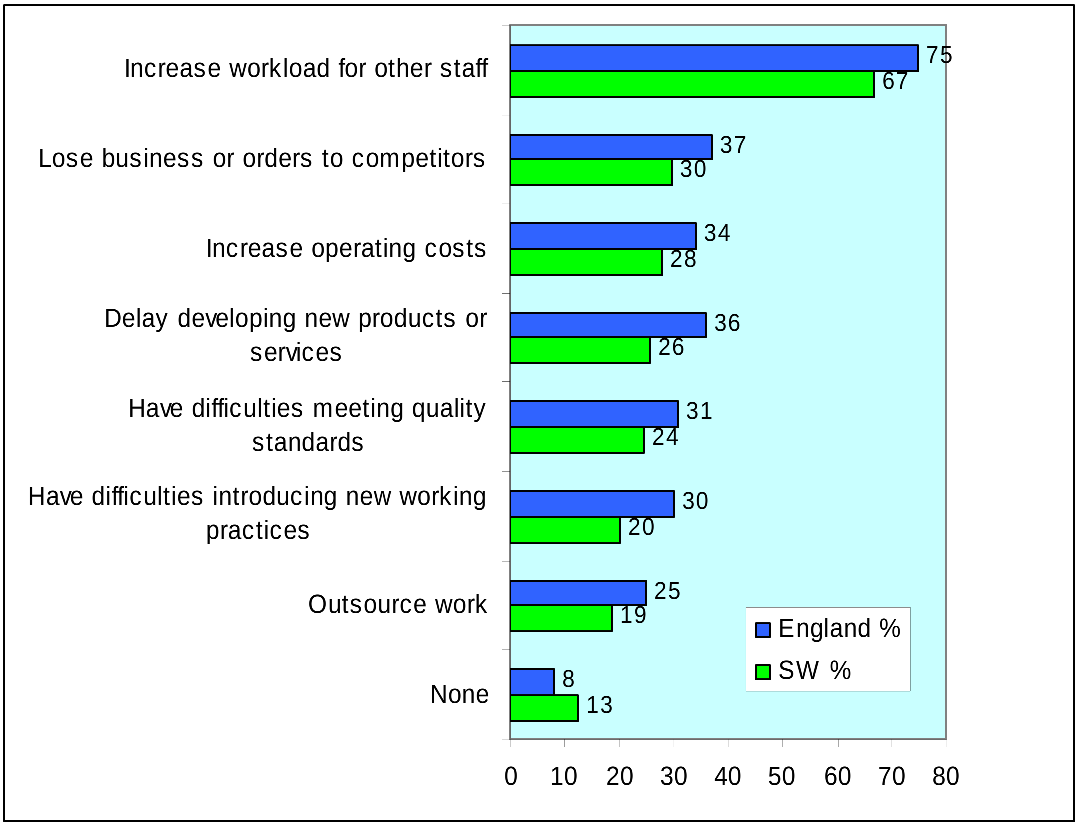
Source: NESS07

Note: SSCs with fewer than 100 SSVs omitted from above.

Impact of skill shortage vacancies

The impact of SSVs on local firms is to increase the pressure on existing staff and loss of business and hence competitiveness:

Figure 25: Impact of skill shortages: South West and England compared



Source: NESS2007

Sub-samples by SSC are too small to be considered robust and should be treated with caution, but the information shows significant difference by sector.

Actions to overcome SSVs

The main strategies used by employers to overcome their difficulties tend to be increased advertising or expenditure on recruitment and the exploration of new recruitment methods. This is true across all sectors.

Skills gaps

The incidence of skills gaps (i.e. the extent to which employers perceive their existing workforce as not being fully proficient) varies widely by region and it can be seen that:

- Employers in the South West have an above average likelihood of identifying skills gaps and are the most likely to identify skills gaps after employers in the North East and London.

- Contrary to wider trends, skills gaps have increased in the South West since 2005.
- The share of skills gaps in the South West is in line with its share of employment.

Figure 26: Skills gaps by region

	% of establishments with skills gaps		No. of employees not fully proficient	% of staff with skills gaps		Share of employment	Share of skills gaps
	2005	2007		2005	2007		
East Midlands	15	15	114,700	6	6	8	8
East of England	15	15	145,500	5	6	10	11
London	13	17	287,300	6	7	18	21
North East	21	19	61,900	6	6	5	5
North West	16	14	166,500	6	6	13	12
South East	18	15	211,000	7	6	16	16
West Midlands	16	14	125,800	5	5	10	9
Yorkshire & the Humber	23	14	110,800	8	5	10	8
South West	**15**	**16**	**137,600**	**5**	**6**	**10**	**10**
England	16	15	1,361,100	6	6	100	100

Source: NESS2007

Within the South West, analysis by SSC, shows that Government Skills SSC has the largest proportion of employers with any skills gaps in their workforce (34%), although the data is based on very small samples, which may skew the findings. Even so, this reflects the national picture where this SSC has by far the highest proportion of skills gaps (29%). Made up mainly of large employers, Government Skills also has far more formalised appraisal systems than many small employers and this will also allow establishments in this sector to more readily identify gaps.

Figure 27: Skills gaps by SSC compared with share of employment

			Skills Gaps			
	Unweighted base	**% employers with skills gaps**	**Number of employees not fully proficient (number of skills gaps)**	**% of staff reported as having skills gaps**	**Share of employment**	**Share of all skills gaps**
England	79,018	15%	1,361,138	6%	%	%
South West	8,454	16%	137,036	6%	100	100
Asset Skills	312	12%	4,032	6%	3	3
Automotive Skills	378	18%	3126	6%	2	2
Cogent	182	20%	2,107	7%	1	2
ConstructionSkills	536	15%	6,806	6%	5	5
Creative and Cultural	281	12%	1,026	6%	1	1
Energy & Utility Skills	*70*	*15%*	*590*	*2%*	1	0
e-skills UK	291	11%	6870	14%	2	5
Financial Services	217	17%	3,081	4%	4	2
GoSkills	166	13%	1,072	4%	1	1
Government Skills	*30*	*34%*	*2,670*	*6%*	2	2
Improve	147	21%	1,234	3%	2	1
Lantra	572	12%	3,114	6%	2	2
Lifelong Learning UK	257	17%	4131	5%	4	3
Non-SSC employers	1,349	14%	18,877	4%	23	14
People 1st	641	22%	25,508	15%	8	19
Proskills	215	19%	1,977	7%	1	1
SEMTA	341	19%	10,983	8%	6	8
Skillfast-UK	183	15%	715	5%	1	1
Skills for Care and Development	411	19%	6,080	6%	4	4
Skills for Health	242	20%	5,563	3%	8	4
Skills for Justice	*38*	*20%*	*528*	*2%*	1	0
Skills for Logistics	222	14%	2,943	5%	3	2
SkillsActive	207	16%	2,360	8%	1	2
Skillset	126	13%	277	3%	0	0
Skillsmart Retail	821	20%	19,829	8%	11	14
SummitSkills	219	21%	1537	8%	1	1

Source: NESS2007

> Overall, those where the incidence of skills gaps is higher than average and where at least 1 in 5 employers are affected include:

Government Skills
People 1st,
Improve Ltd
Summit Skills
Cogent
Skillsmart Retail
Skills for Justice
Skills for Health

- E-skills UK is one SSC where skills gaps are below average but where the density (i.e. proportion of staff affected) is particularly concentrated.
- People 1st has disproportionate share of skills gaps since it accounts for 8% of employment, but 19% of skills gaps.
- Those less affected by skills gaps than average include:
- Creative and Cultural
- Asset Skills
- Lantra
- Skills for Logistics and
- GoSkills
- 14% of all skills gaps occur in employers not covered by an SSC.

Skills gaps by occupation

Analysis of which occupations employers consider suffer from skill shortages compared with the share of employment of each occupation in the South West shows that:

- In common with the national pattern of skills gaps, the concentration of skills gaps in **sales and customer service** and **elementary** positions is higher than their proportion of employment.
- However, this concentration is especially strong in the South West where skills gaps in sales account for 1 in 4 skills gaps compared with just 15% of employment. This is the highest figure of any region.

Figure 28: Skills gaps by occupation; South West and England

	Profile of employment in South West %	% of skills gaps in South West	% of skills gaps in England
Managers	17	11	12
Professionals	10	7	9
Assoc. professionals	6	6	7
Administrative	14	10	14
Skilled trades	8	9	8
Personal service	9	8	7
Sales	15	24	19
Operatives	5	8	7
Elementary	13	17	17

Source: NESS2007

To a certain extent, whether or not employers have skills gaps in particular occupations relates to the types of occupations certain sectors employ, i.e. e-skills UK's employers are more likely to report skills gaps among professionals whereas ConstructionSkills are likely to identify them among skilled trades:

Figure 29: Skills gaps by SSC and occupation

SSCs	Total number of staff NOT fully proficient	Managers	Professionals	Associate professionals	Admin/clerical staff	Skilled trades staff	Personal service staff	Sales/customer service staff	Machine operatives	Elementary staff
		% in each occupation with skills gaps as proportion of total								
Asset Skills	**5,428**	14	6	2	11	0	6	9		52
Automotive Skills	**3,203**	11	1	8	8	34		29	4	4
Cogent	**1,701**	14	2	1	30	9		20	11	13
ConstructionSkills	**5,502**	15	5	11	8	23	0	17	2	18
Creative and Cultural	**789**	26	3	9	17	6	4	11		23
Energy & Utility Skills	***471***	*35*		*17*	*8*	*17*		*3*	*9*	*12*
e-skills UK	**4,223**	13	29	20	12	5		19	3	0
Financial Services	**3,353**	15	3	6	29	0		46		2
Goskills	**1,145**	8	24		8	13		19	27	1
Government Skills	***3,369***	*18*	*5*	*6*	*16*	*35*	*3*	*18*		
Improve	**1,052**	23	3	5	13	7		11	23	14
Lantra	**3,809**	25	2	4	12	11	4	4	4	35
Lifelong Learning UK	**3,358**	19	35	2	17	3	3	11		10
People 1st	**19,167**	9	1	0	3	6	1	19	0	61
Proskills	**1,684**	15	2	5	16	9		13	30	9
SEMTA	**10,715**	8	3	3	6	15		3	57	5
Skillfast-UK	**834**	14			5	5		9	30	38
Skills for Care and Development	**5,130**	8	7	7	6	2	65	1	1	4
Skills for Health	**9,152**	5	4	3	14	1	59	4		9
Skills for Justice	***717***	*58*	*4*		*17*		*11*			*10*
Skills for Logistics	**2,837**	5	7	2	19	0		5	28	34
SkillsActive	**2,381**	6	3	8	6	17	35	6		19
Skillset	**397**	12	3	27	7	37		12	1	1
Skillsmart Retail	**19,964**	9	1	1	4	2	0	72	1	11
SummitSkills	**1,416**	5	2	5	8	65		13		2
Non-SSC employers	**17,547**	12	17	6	22	10	6	14	5	7
Total	**129,343**	**11**	**7**	**4**	**11**	**9**	**9**	**22**	**8**	**19**

Source: NESS2007

To take the employment profile into account, more detailed analysis compares the proportion of skills gaps per occupation with the proportion of employment in that same occupation. This shows that certain sectors have high levels of skills gaps relative to the share of employment of that occupation:

Figure 30: Sectors with a disproportionately high proportion of occupational skills gaps compared with employment

	SSC	**% of skills gap in occupation**	**% share of employment**
Managers	Improve	23	13
	Skills for Justice	58	17
Professionals	GoSkills	24	6
Assoc. professionals			
Administrative	Cogent	30	10
Skilled trades	SummitSkills	65	43
	Government Skills	35	14
	Skillset	37	11
Personal service	Skills for Care and Development	65	52
	SkillsActive	35	18
Sales and customer service	ConstructionSkills	17	4
	Financial Services Skills	46	32
	GoSkills	19	6
	Skillsmart Retail	72	56
Operatives	SEMTA	57	28
Elementary	Lantra	35	19
	Skillfast UK	38	24
	Construction Skills	18	10
	Creative and Cultural	23	10
	Asset Skills	52	25

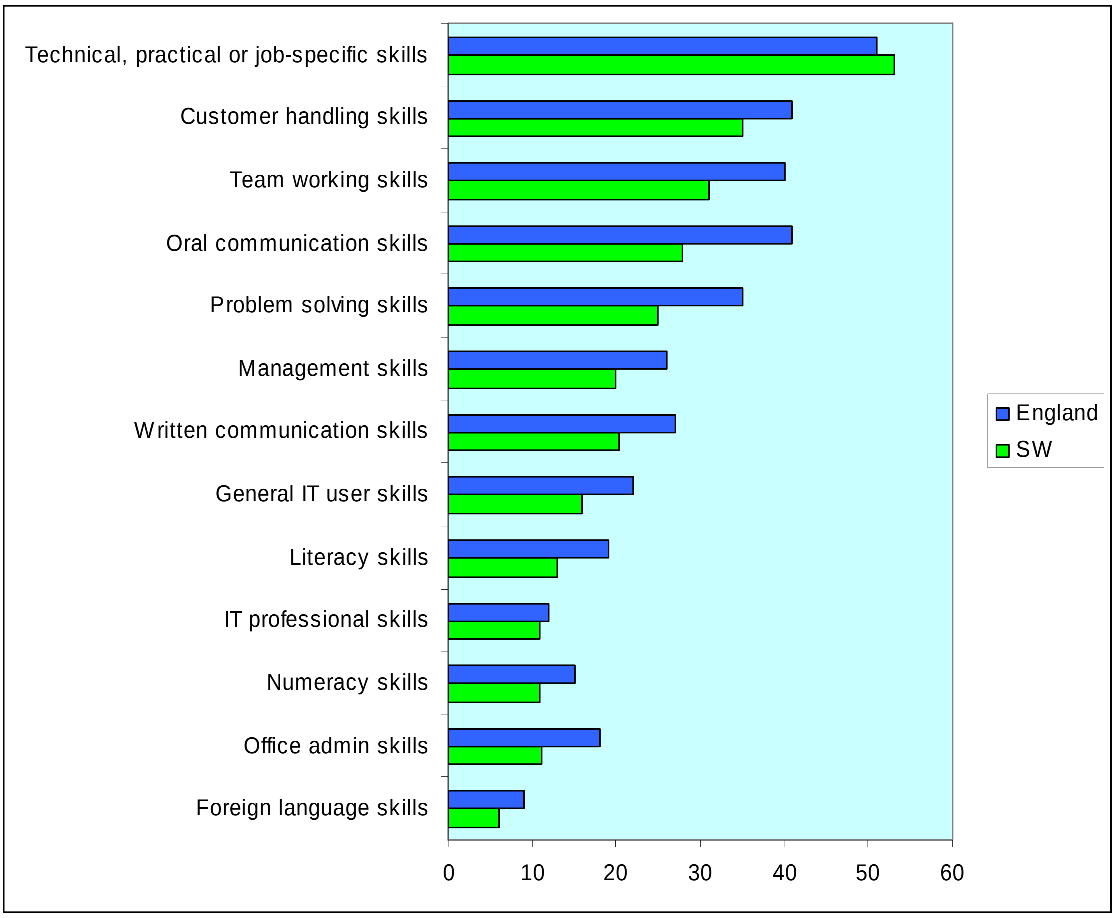
Source: NESS2007

It can be seen that few managers, professionals or associated professionals were described as lacking in proficiency and the concentration of gaps is in fact at the lower end of the occupational spectrum amongst elementary occupations and sales and customer services.

Nature of skills gaps

Employers with skills gaps were asked what skills they considered needing improving. The pattern of skills gaps identified broadly followed the national pattern with technical or practical skills heading the list followed by a range of what are commonly referred to as 'soft' skills – customer handling, team working and communication skills.

Figure 31: Nature of skills gaps: South West and England compared



Source: NESS2007

By sector, a number of key issues can be identified:

- **General IT User skills and IT professional skills** are most likely to be lacking in employees in Asset Skills, Creative and Cultural and Government Skills.
- **Oral communication skills** were most likely to be identified in Skillfast-UK, Financial Services; Skills for Health, Skills for Care and Development as well as Government Skills and Skills for Justice.
- **Customer handling skills** were identified as lacking amongst most service sector employers but especially Skillsmart Retail and People1st.
- **Foreign language skills** were mainly identified by Lantra, Improve, GoSkills and Skills for Health and it is likely that these findings reflect the need for English skills amongst foreign workers.

- **Management skills** were identified predominantly by employers in Asset skills, Lifelong Learning UK and Creative and Cultural.

Reasons for skills gaps

The main causes of skills gaps identified by employers have remained consistent in successive surveys with 'lack of experience' or 'staff being recently recruited' as by far the main cause. The responses in the South West were similar to the national findings.

Figure 32: Reasons for skills gaps in the South West

Reasons for skills gaps	%
Lack of experience or their being recently recruited	69
Staff lack motivation	19
Failure to train and develop staff	19
Inability of workforce to keep up with change	14
Recruitment problems	9
High staff turnover	8
Lack of other skills (e.g. communication, interpersonal)	3
Other	3
Language barrier / English not being first language	2
No particular causes	2
Don't know	1
Requirements for job are constantly changing	1

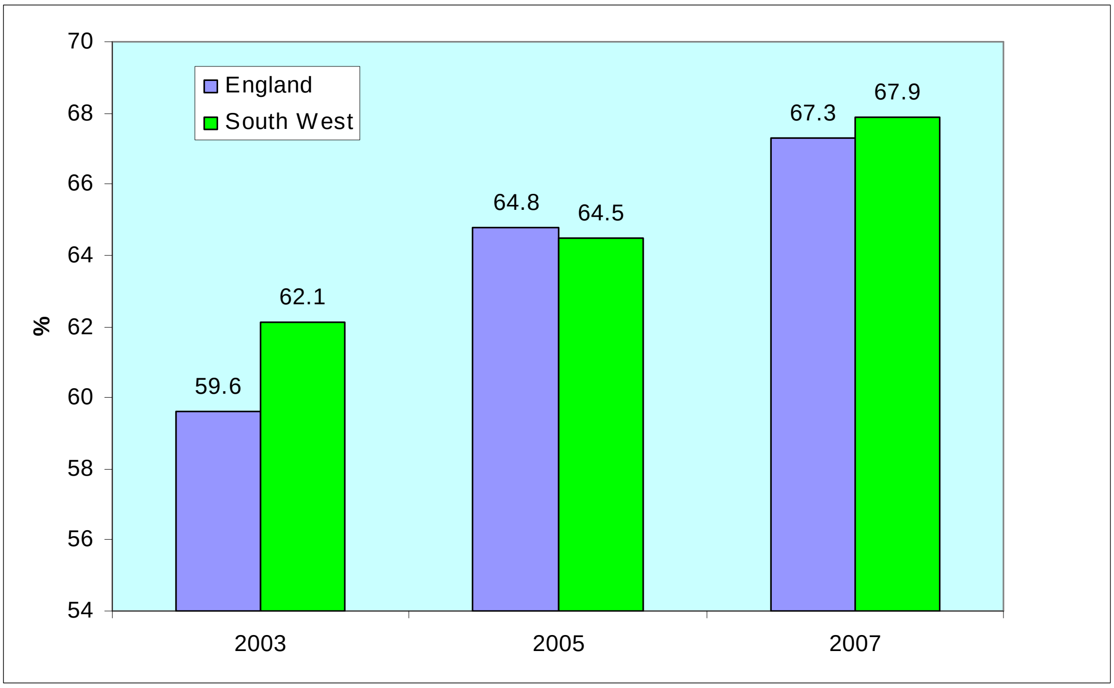
Source: NESS2007

Training

Of particular interest to skills supply is the volume of training undertaken by employers. In the last 12 months **67.9%** of establishments in the South West had provided training for one or more of their employees, slightly above the national average of 67.3%.

Training levels have been rising steadily in recent years in both the region and across England. Currently 5.8% more employers in the region provide training than did so in 2003.

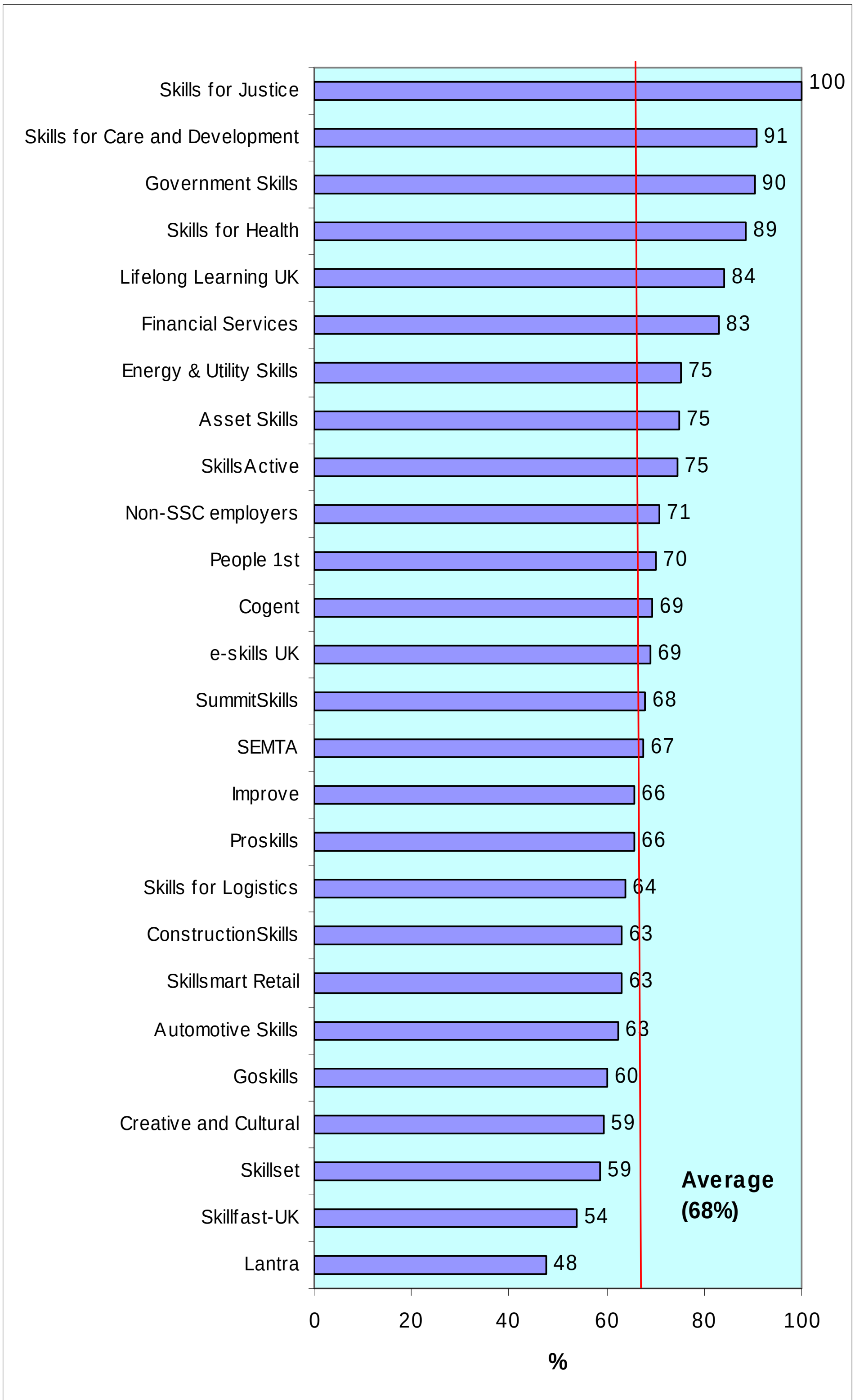
Figure 33: Trends in proportion of employers providing training in past 12 months 2003- 2007: South West and England compared



Source: NESS2007

Analysis by industry shows that public sector organisations are most likely to train their staff, with rates of training very high in Skills for Justice, Skills for Care and Development, Skills for Health and Government Skills. Training levels were lowest in the agricultural sector, Lantra, by a considerable margin.

Figure 34: Proportion of employers providing training for their staff in the past 12 months



Source: NESS2007

While around 2 out of 3 employees overall have received training, there is wide variation by sector:

- In the health sector, virtually all employers deliver training – 100% in Skills for Health and 91% in Skills for Care and Development.
- Employers least likely to deliver training are in Skillfast-UK (40%), Lantra (43%) Energy and Utility Skills (44%), Summit Skills (44%) and Cogent (46%).
- Employers most likely to train off-the-job only are in Creative and Cultural (19%) SummitSkills (17%) and Automotive Skills (17%).
- Employers in Skillsmart Retail are most likely of all sectors to train their staff on the job only.
- Lifelong Learning UK, Skills for Health and Skills for Care and Development are most likely to have delivered training to more than 90% of staff.
- Less than half the workforce has received training in employers covered by Lantra (43%), Cogent (46%), Skillfast-UK (40%), Energy & Utility Skills (44%) and SummitSkills (44%).

Figure 35: Proportion of employers providing different types and volumes of training for their staff in the past 12 months

	Base unwtd	Train at all	Off job train only	On job train only	Trainers train 90%+	Trainers Train <25%	Trainees as % of workforce
Asset Skills	312	**75**	13	24	50	4	65
Automotive Skills	378	**63**	17	21	31	10	53
Cogent	182	**69**	14	31	31	22	46
Construction Skills	536	**63**	19	15	37	8	58
Creative and Cultural	281	**59**	19	20	44	8	51
Energy & Utility Skills	*70*	***75***	*21*	*24*	*32*	*11*	*44*
e-skills UK	291	**69**	11	28	47	5	71
Financial Services	217	**83**	10	29	56	6	53
Goskills	166	**60**	11	25	34	12	51
Government Skills	*30*	***90***	*3*	*13*	*48*	*5*	*66*
Improve	147	**66**	10	20	41	18	58
Lantra	572	**48**	16	15	32	4	43
Lifelong Learning UK	257	**84**	14	11	61	5	81
People 1st	641	**70**	15	30	39	10	63
Proskills	215	**66**	13	30	38	17	58
SEMTA	341	**67**	13	27	27	20	56
Skillfast-UK	183	**54**	8	30	31	18	40
Skills for Care and Development	411	**91**	12	14	70	3	91
Skills for Health	242	**89**	12	16	66	8	100
Skills for Justice	*38*	***100***	*10*	*16*	*42*	*3*	*71*
Skills for Logistics	222	**64**	11	33	33	20	73

SkillsActive	207	**75**	14	21	44	9	64
Skillset	126	**59**	13	24	49	10	57
Skillsmart Retail	821	**63**	8	36	42	10	59
SummitSkills	219	**68**	17	21	29	7	44
Non-SSC employers	1,349	**71**	16	19	47	8	60
Total	8,454	**68**	14	23	44	9	65

Source: NESS2007

The key difference between on and off the job training is that on the job training tends to be a less formal or structured approach to training and therefore less likely to lead to qualifications. In turn, on the job training is less likely to impact on key targets to improve workforce qualifications at intermediate levels. This is reflected in more detailed findings as to whether employers train their staff through the FE sector:

> Higher than average proportions of employers in People 1st and SkillsActive train their staff in induction only.

> Use of the FE sector is greatest in Skills for Care and Development (46%), Government Skills (43%), SummitSkills (41%) and Skills for Health (39%). Employers in Creative and Cultural (9%) and Skilllfast-UK (9%) make least use of FE.

> In turn, these low users of FE are some of the least likely to train many of their staff to a nationally recognised qualification. As a consequence, although sectors such as Financial Services deliver a significant amount of training, little of it is directed at improving the qualification base of the staff; somewhat at odds with central government aspirations.

> Employers in Skills for Care and Development are most likely to be delivering training to a qualification and to an NVQ, no doubt reflecting the legislative imperative to upskill the workforce in the sector.

Figure 36: Proportion of employers providing different types of training for their staff in the past 12 months and the percent of staff being trained towards qualifications

	Train but induction only	**Train through FE college**	**% of staff trained towards nationally recognised qual.**	**% of staff trained towards NVQ**
Asset Skills	5	14	10	4
Automotive Skills	3	26	11	6
Cogent	5	15	4	2
ConstructionSkills	6	20	12	8
Creative and Cultural	2	9	5	2
Energy & Utility Skills	*5*	*16*	*8*	*3*
e-skills UK	4	14	12	3
Financial Services	2	11	9	2
Goskills	5	12	13	8
Government Skills	*3*	*43*	*18*	*14*

Improve	8	21	10	4
Lantra	4	15	11	5
Lifelong Learning UK	4	31	8	4
People 1st	10	13	9	3
Proskills	5	13	6	1
SEMTA	5	21	8	5
Skillfast-UK	6	9	4	1
Skills for Care and Development	8	46	30	22
Skills for Health	7	39	13	9
Skills for Justice	*0*	*31*	*8*	*5*
Skills for Logistics	6	9	6	3
SkillsActive	9	20	22	8
Skillset	1	11	2	1
Skillsmart Retail	4	8	6	3
SummitSkills	6	41	23	11
Non-SSC employers	4	24	10	5
Total	**5**	**19**	**11**	**6**

Source: NESS2007

Of those being trained towards an NVQ, 47% of trainees were training towards a Level 2 qualification and 45% to a Level 3 qualification.

Reasons for not providing training

Most employers who did not provide training in the last year did not do so because they consider their staff to be fully proficient. Supply side reasons for not providing training were not significant (no local courses (5%), courses too expensive (3%), start dates inconvenient (1%) providers unsatisfactory (1%)). However, three SSCs were twice as likely as average (5%) to cite a belief that the requisite courses were not available locally: Cogent (10%), Proskills (10%) and Creative and Cultural (12%). Additionally 8% of Creative and Cultural employers compared with 1% overall did not consider the quality of local courses to be satisfactory – although of course, sub-samples on which these findings are based are small.

Figure 37: Reasons employers give for not providing training (multi response)

All our staff are fully proficient	61
Learn by experience / Learn as you go	7
Small firm/training not needed due to size of establishment	5
The courses you are interested in are not available locally	5
External courses are too expensive	3
Employees are too busy to give training	3
Employees are too busy to go on training courses	2
Lack of budget/funding for training	2
Business not operating long enough / New business (inc. takeover transition)	2
Lack of time	1
Managers have lacked the time to organise training	1
The start dates or times of the courses are inconvenient	1
The quality of the courses or providers locally is not satisfactory	1
I don't know what provision is available locally	1
It is difficult to get information about the courses that are available locally	1
Training is arranged by Head Office	1
Other Misc	4
No particular reason	10
Don't know	1

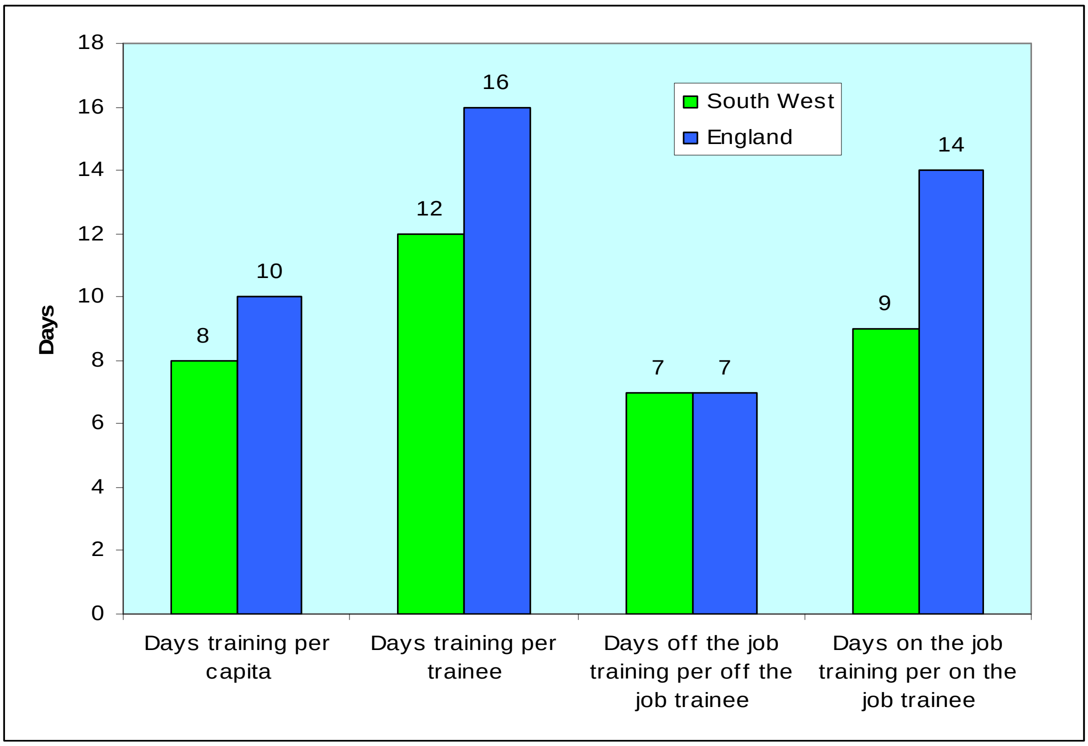
Source: NESS2007

Training volumes

On average, employers have delivered 8 days training in total per employee per annum across the South West, a figure below the national average of 10 days per employee and the lowest of any region.

Not only is training per head less than average but among those who do train, the average number of training days delivered (12 days) is the shortest in the country where it averages 16 days. Although the number of off the job training days is average, on the job training days per employee trained (9 days) are again lowest and well below the national average of 14 days:

Figure 38: Average number of days training per annum provided by employers in South West and England compared



Source: NESS2007

Note: The term trainee is used to refer to anyone who has received training.

Within the region, there are significant sectoral differences:

> Employers in Skills for Care and Development provide more than twice the average number of days training per employee (15 days re 8 days on average). Training days per capita are also relatively high in Skills for Health (12 days) and Skillsmart Retail (10 days).

> Lowest levels of training are provided in Lantra, Skillfast-UK, Energy and Utility Skills and GoSkills which all average 4 days training per employee. Employers in these sectors also provided fewest days training per member of staff trained, although here, the most notable figure is the low number of days training provided by employers in Skills for Logistics (7days).

> Skillset employers provide the least amount of off the job training to their trainees (3 days) and Skills for Care and Development (11 days), Cogent (11 days) and Government Skills (13 days) the most.

> On the job training levels are highest in Proskills (16 days) and Skillsmart Retail (15 days).

Figure 39: Average number of days training provided by SSC

	Days training per capita	Days training per trainee	Days off job per off job trainee	Days on job per on job trainee
Asset Skills	7	10	6	9
Automotive Skills	5	9	7	7
Cogent	5	10	11	5
ConstructionSkills	7	12	6	8
Creative and Cultural	5	10	5	10
Energy & Utility Skills	4	10	8	10
e-skills UK	9	13	5	13
Financial Services	8	15	7	11
Goskills	4	9	4	6
Government Skills	5	8	11	4
Improve	5	9	5	9
Lantra	4	9	7	7
Lifelong Learning UK	7	9	6	7
People 1st	8	13	5	11
Proskills	6	11	5	16
SEMTA	6	11	6	5
Skillfast-UK	4	10	4	9
Skills for Care and Development	15	16	11	10
Skills for Health	12	12	4	5
Skills for Justice	5	7	5	6
Skills for Logistics	5	7	7	5
SkillsActive	8	13	5	9
Skillset	5	8	3	7
Skillsmart Retail	10	18	7	15
SummitSkills	8	17	9	15
Non-SSC employers	8	13	8	9
Total	**8**	**13**	**7**	**9**

Source: NESS2007

Training infrastructure

Not only does the level of commitment of employers vary from employer to employer, but so does their overall approach. Training can be viewed on a spectrum form ad hoc responses to day to day issues at one end, to the development and delivery of workforce training as part of an integrated strategy at the other.

An indication of the positions employers take is offered by the positions that firms take on training infrastructure, for example, a business plan, a training plan, and a training budget. In the same vein, employers were also asked what proportions of their staff had formal job descriptions and annual performance reviews, and whether or not the establishment formally assesses skills gaps. In these respects, employers in the South West are broadly in line with the national pattern.

Trend data shows that change is slow and that since 2003 the use of formal training instruments has remained relatively stable, with the exception of the use of Annual Performance Reviews which have dropped significantly since 2005:

Figure 40: Trends in the use of different training instruments, 2003-2007

	South West			**England**
	2003	**2005**	**2007**	**2007**
Business plan	57	55	56	57
Training plan	39	44	45	48
Training budget	33	32	35	35
Employers where 50% or more staff have an Annual Performance Review	78	71	60	63
Formally assess skills gaps	53	55	56	57

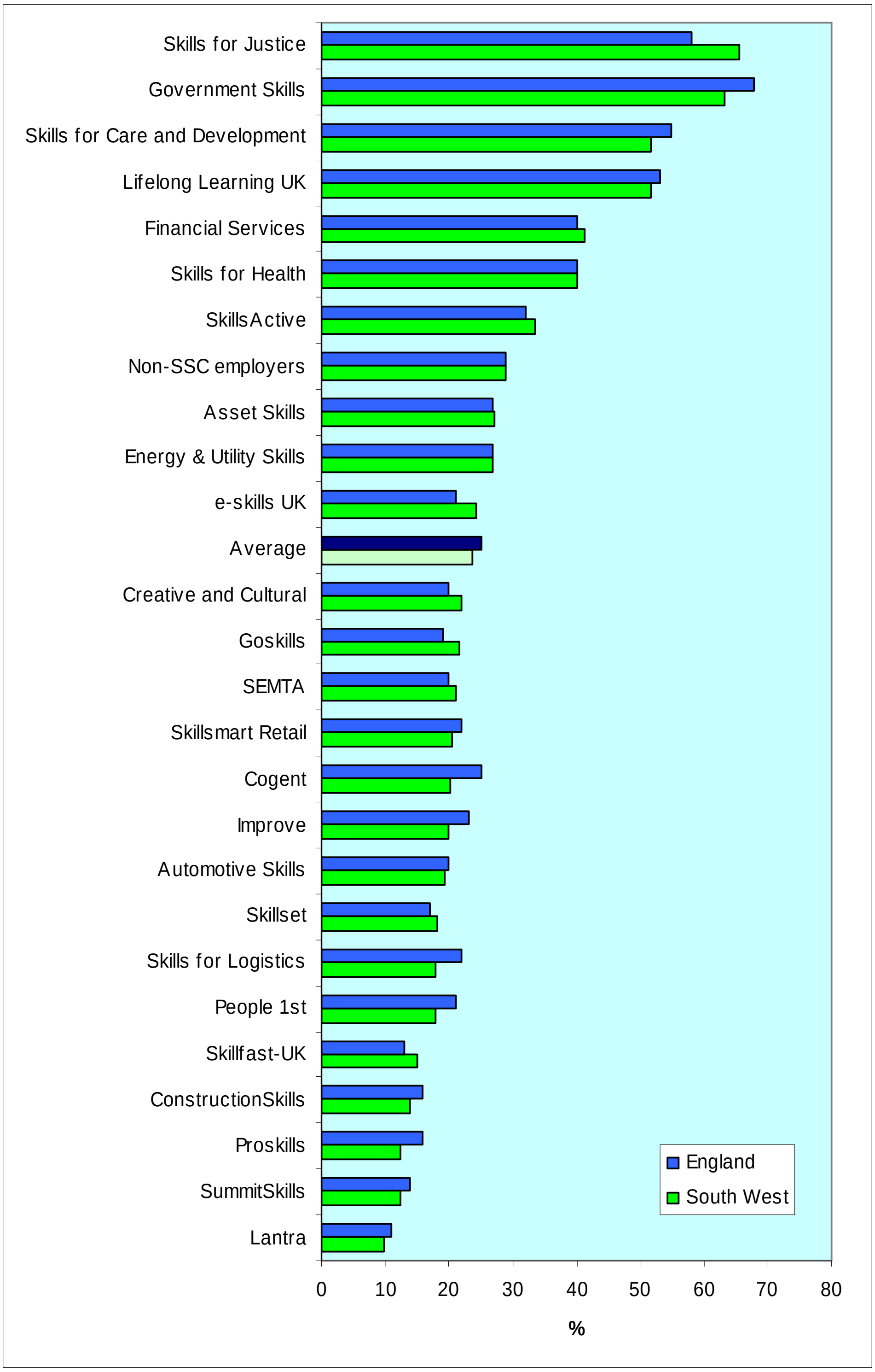
Source: NESS2007

The extent to which employers have sophisticated levels of planning for training (business plan, budget and training plan) is significantly different by sector. The figure below shows the proportion of employers who use of all three training instruments and whose planning can therefore be considered 'advanced'.

In keeping with the high levels of training undertaken by the public sector, these sectors (Skills for Justice, Government Skills, Skills for Care and Development, Lifelong Learning UK and Skills for Health) along with Financial Services show the greatest levels of training planning and budgeting.

Employers covered by Skillfast-UK, Construction Skills, Proskills and SummitSkills – all sectors with high proportions of skilled trades or semi-skilled occupations - were those with low levels of planning, suggesting a more ad hoc approach to training. Employers covered by Lantra had the least formalised training infrastructure of all. The distribution of employers' approaches to training by SSC is very similar to the national pattern:

Figure 41: Employers with an advanced approach* to training by SSC, South West and England compared



* % of employers using a business plan, training plan and training budget

Source: NESS2007

Train to Gain

There is considerable scope to improve the awareness and take up of Train to Gain across the economy. Currently, just over 1 in 4 employers are aware of Train to Gain and 1 in 20 has been involved with it.

Awareness and use is highest in the health and education sectors (Lifelong Learning UK, Skills for Care and Development, and Skills for Health).

Lowest levels of awareness are evident in employers covered by Energy and Utility Skills, Lantra and Automotive Skills.

Findings relate to 2007, less than a year after the national roll out of Train to Gain and it may be expected that awareness and involvement will have risen in the intervening period. Nevertheless, the findings provide a useful benchmark against which future progress can be measured.

Figure 42: Awareness and involvement of Train to Gain by SSC

	Aware of Train to Gain	Involved with Train to Gain
Asset Skills	25	3
Automotive Skills	19	2
Cogent	26	2
ConstructionSkills	29	3
Creative and Cultural	26	3
Energy & Utility Skills	*15*	*0*
e-skills UK	29	6
Financial Services	27	3
Goskills	33	5
Government Skills	*30*	*12*
Improve	33	9
Lantra	18	2
Lifelong Learning UK	57	21
Non-SSC employers	27	3
People 1st	25	5
Proskills	27	3
SEMTA	32	6
Skillfast-UK	31	6
Skills for Care and Development	44	17
Skills for Health	40	18
Skills for Justice	*27*	*5*
Skills for Logistics	29	5
SkillsActive	23	5
Skillset	21	1
Skillsmart Retail	25	3
SummitSkills	24	2
All South West	**27**	**5**
England	**28**	**4**

Source: NESS2007

Recruits to Apprenticeships by sector

- There are significant variations in the use of Apprenticeships by sector. Employers in sectors relating to manufacturing and construction - where there is a well established tradition of Apprenticeships - are those most likely to offer them.
- SummitSkills (51 per cent), Automotive Skills (40 per cent), SEMTA (21 per cent) and ConstructionSkills (19 per cent) are not only most likely to offer Apprenticeships but are also most likely to have had staff involved in Apprenticeships. Along with Energy and Utility Skills these four SSCs are most likely to have recruited young people to start Apprenticeships in the past 12 months.

- On the other hand, involvement with Apprenticeships is lowest amongst employers covered by Improve Ltd, Skillfast UK, and Cogent.

Figure 43: Recruits to Apprenticeships in the South West by sector; (percentages)

SSC	Offer Apprenticeships per cent	Staff undertaking Apprenticeships in last 12 months per cent	Any 16 to 24 yr old recruits to Apprenticeships per cent	Any 16-18 yr old recruits to Apprenticeships per cent
SummitSkills	51	33	32	28
Automotive Skills	40	21	18	16
SEMTA	21	12	9	7
ConstructionSkills	19	11	10	9
Skills for Health	18	11	8	4
SkillsActive	17	10	7	6
Skills for Care and Development	16	10	7	4
Energy and Utility Skills	*15*	*9*	*9*	*6*
Non SSC	15	9	7	4
People 1st	14	8	6	4
Skillset	13	4	4	1
Skills for Justice	*12*	*12*	*2*	*0*
Lifelong Learning UK	11	7	6	5
Creative and Cultural	11	5	4	1
Lantra	10	5	4	3
Skillsmart Retail	9	4	3	2
Asset Skills	9	5	5	3
Government Skills	*9*	*4*	*4*	*0*
Proskills	8	3	3	1
GoSkills	8	4	3	3
Skills for Logistics	8	3	3	3
Financial Services Skills	8	6	5	4
e-skills	7	4	4	3
Cogent	6	4	4	2
Improve Ltd	6	5	4	3
Skillfast UK	6	4	2	0
All	**15**	**8**	**7**	**5**

Source: NESS07

Annex

Annex 1 – SSC definitions

Sectors covered by licensed SSCs are listed below.

ASSET SKILLS				
Asset Skills is the Sector Skills Council for property, housing, cleaning services and facilities management (www.assetskills.org)				
SIC 2003: 70, 74.7				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	66,600		2,190,300	
Share of regional employment	3.0			
Number of businesses	12,600		215,100	
Share of regional business base	5.9			
Average no. of employees	5		10	
Workforce characteristics				APS 2006
% Male	46		54	
% Female	54		46	
% of working age who are self-employed	30		15	
Full time	59		72	
Part time	41		28	
Occupational breakdown				APS 2006
Managers and senior officials	16,865	34	16	
Professionals	2,649	5	12	
Associate professionals	4,775	10	15	
Administrative and secretarial occupations	6,306	13	11	
Skilled trades occupations	1,024	2	12	
Personal service occupations	511	1	8	
Sales and customer service occupations	1,928	4	8	
Process, plant and machine operatives	472	1	6	
Elementary occupations	15,273	31	12	
All	49,803	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	16,588	33.3	31.8	
Level 3	9,653	19.4	22.8	
Level 2	9,987	20.1	21.8	
None or below Level 2	13,575	27.2	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,883		58,534	
Total number of hard to fill vacancies	543		20,453	
Hard to fill vacancies as % of all vacancies	33		35	
Hard to fill vacancies as % of employment	1.3		0.9	
Skill shortage vacancies	162		12,734	
% of vacancies that are SSVs	9		22	
Skill shortage vacancies per 1,000 employees	2		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	12		16	
Number of employees not fully proficient	4,032		137,036	
% of staff reported as having skills gaps	6		6	

Training				NESS 2007
Proportion of employers providing training within past 12 months	75		68	
Trainees as % of workforce	65		65	
Average days training per head of workforce	7		8	
Awareness of Train to Gain	25		27	
Involvement with Train to Gain	3		4	

AUTOMOTIVE SKILLS				
is the Sector Skills Council for the retail motor industry (www.automotiveskills.org.uk)				
SIC 2003: 50.1-50.4, 71.1. NOTE: APS analysis includes 50.5 as not possible to isolate from others.				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	52,900		2,190,300	
Share of regional employment	2.4			
Number of businesses	8,400		215,100	
Share of regional business base	3.9			
Average no. of employees	6		10	
Workforce characteristics				APS 2006
% Male	81		54	
% Female	19		46	
% of working age who are self-employed	14		15	
Full time	84		72	
Part time	16		28	
Occupational breakdown				APS 2006
Managers and senior officials	9,471	16	16	
Professionals	0	0	12	
Associate professionals	2,691	5	15	
Administrative and secretarial occupations	7,335	12	11	
Skilled trades occupations	24,035	41	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	6,826	12	8	
Process, plant and machine operatives	6,427	11	6	
Elementary occupations	2,297	4	12	
All	59,082	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	2,820	4.8	31.8	
Level 3	24,154	40.9	22.8	
Level 2	14,536	24.6	21.8	
None or below Level 2	17,572	29.7	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,740		58,534	
Total number of hard to fill vacancies	600		20,453	
Hard to fill vacancies as % of all vacancies	34		35	
Hard to fill vacancies as % of employment	1.1		0.9	
Skill shortage vacancies	483		12,734	
% of vacancies that are SSVs	28		22	
Skill shortage vacancies per 1,000 employees	9		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	18		16	
Number of employees not fully proficient	3,126		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	63		68	
Trainees as % of workforce	53		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	19		27	
Involvement with Train to Gain	2		4	

COGENT

Cogent is the Sector Skills Council for the chemical, nuclear, oil and gas, petroleum and polymer industries (www.cogent-SSC.com)

SIC 2003: 11, 23-25 (excluding 24.3, 24.64, 24.7, 25.11, 25.12), 50.5 (Note: 50.5 is not included in APS)

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	28,200		2,190,300	
Share of regional employment	1.3			
Number of businesses	1,600		215,100	
Share of regional business base	0.8			
Average no. of employees	17		10	
Workforce characteristics				APS 2006
% Male	67		54	Caution: Findings based on sub-samples < 100
% Female	33		46	
% of working age who are self-employed	0		15	
Full time	93		72	
Part time	7		28	
Occupational breakdown				APS 2006
Managers and senior officials	4,876	21	16	Caution: Findings based on sub-samples < 100
Professionals	455	2	12	
Associate professionals	2,923	12	15	
Administrative and secretarial occupations	915	4	11	
Skilled trades occupations	2,480	10	12	
Personal service occupations	526	2	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	6,341	27	6	
Elementary occupations	5,183	22	12	
All	23,699	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	5,673	23.9	31.8	
Level 3	4,098	17.3	22.8	
Level 2	5,697	24.0	21.8	
None or below Level 2	8,231	34.8	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1086		58,534	
Total number of hard to fill vacancies	348		20,453	
Hard to fill vacancies as % of all vacancies	32		35	
Hard to fill vacancies as % of employment	1.5		0.9	
Skill shortage vacancies	225		12,734	
% of vacancies that are SSVs	21		22	
Skill shortage vacancies per 1,000 employees	7		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	20		16	
Number of employees not fully proficient	2,107		137,036	
% of staff reported as having skills gaps	7		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	69		68	
Trainees as % of workforce	46		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	26		27	
Involvement with Train to Gain	2		4	

CONSTRUCTIONSKILLS

ConstructionSkills is the Sector Skills Council for the construction industry (www.cskills.org)

SIC 2003: 45.1, 45.2, 45.32, 45.34, 45.4, 45.5, 74.2 NOTE: 45.11-45.40 also included in APS analysis

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	112,000*		2,190,300	Note: ABI excludes self-employed
Share of regional employment	5.1			
Number of businesses	24,400*		215,100	
Share of regional business base	11.3			
Average no. of employees	5		10	
Workforce characteristics				APS 2006
% Male	90		54	
% Female	10		46	
% of working age who are self-employed	40		15	
Full time	92		72	
Part time	8		28	
Occupational breakdown				APS 2006
Managers and senior officials	31,435	13	16	
Professionals	29,083	12	12	
Associate professionals	12,035	5	15	
Administrative and secretarial occupations	15,431	6	11	
Skilled trades occupations	117,739	49	12	
Personal service occupations	536	0	8	
Sales and customer service occupations	990	0	8	
Process, plant and machine operatives	13,474	6	6	
Elementary occupations	21,033	9	12	
All	241,756	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	58,120	24.0	31.8	
Level 3	77,580	32.1	22.8	
Level 2	49,846	20.6	21.8	
None or below Level 2	56,210	23.2	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	3724		58,534	
Total number of hard to fill vacancies	1912		20,453	
Hard to fill vacancies as % of all vacancies	51		35	
Hard to fill vacancies as % of employment	1.7		0.9	
Skill shortage vacancies	1542		12,734	
% of vacancies that are SSVs	41		22	
Skill shortage vacancies per 1,000 employees	14		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	15		16	
Number of employees not fully proficient	6,806		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	63		68	
Trainees as % of workforce	58		65	
Average days training per head of workforce	8		8	
Awareness of Train to Gain	29		27	
Involvement with Train to Gain	3		4	

CREATIVE AND CULTURAL SKILLS

Creative and Cultural Skills is the Sector Skills Council for Advertising, crafts, cultural heritage, design, music, performing, literary and visual arts (www.ccskills.org)

SIC 2003: 22.14, 22.31, 36.22, 36.3, 74.4, 92.31, 92.32, 92.34, 92.4, 92.52

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	17,200		2,190,300	Note: ABI excludes self-employed
Share of regional employment	0.8			
Number of businesses	3,800		215,100	
Share of regional business base	1.8			
Average no. of employees	4		10	
Workforce characteristics				APS 2006
% Male	53		54	Caution: Findings based on sub-samples < 100
% Female	47		46	
% of working age who are self-employed	44		15	
Full time	62		72	
Part time	38		28	
Occupational breakdown				APS 2006
Managers and senior officials	4,387	15	16	Caution: Findings based on sub-samples < 100
Professionals	989	3	12	
Associate professionals	12,889	43	15	
Administrative and secretarial occupations	1,510	5	11	
Skilled trades occupations	6,010	20	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	606	2	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	3,614	12	12	
All	30,005	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	17,303	57.7	31.8	
Level 3	1,617	5.4	22.8	
Level 2	3,397	11.3	21.8	
None or below Level 2	7,688	25.6	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	798		58,534	
Total number of hard to fill vacancies	363		20,453	
Hard to fill vacancies as % of all vacancies	45		35	
Hard to fill vacancies as % of employment	2.0		0.9	
Skill shortage vacancies	219		12,734	
% of vacancies that are SSVs	27		22	
Skill shortage vacancies per 1,000 employees	12		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	12		16	
Number of employees not fully proficient	1,026		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	59		68	
Trainees as % of workforce	51		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	26		27	
Involvement with Train to Gain	3		4	

ENERGY AND UTILITY SKILLS				
Energy and Utility Skills is the Sector Skills Council for the electricity, gas, waste management and water industries (www.euskills.co.uk)				
SIC 2003: 37, 40.1, 40.2, 41, 60.3, 90.01, 90.02 (NOTE: APS analysis includes 90.03)				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	28,600		2,190,300	
Share of regional employment	1.3			
Number of businesses	1,600		215,100	
Share of regional business base	0.7			
Average no. of employees	18		10	
Workforce characteristics				APS 2006
% Male	83		54	
% Female	17		46	
% of working age who are self-employed	0		15	
Full time	95		72	
Part time	5		28	
Occupational breakdown				APS 2006
Managers and senior officials	4,913	18	16	
Professionals	4,282	16	12	
Associate professionals	2,622	10	15	
Administrative and secretarial occupations	1,540	6	11	
Skilled trades occupations	486	2	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	2,306	8	8	
Process, plant and machine operatives	5,455	20	6	
Elementary occupations	5,873	21	12	
All	27,477	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	7,513	27.3	31.8	
Level 3	4,877	17.7	22.8	
Level 2	7,571	27.6	21.8	
None or below Level 2	7,516	27.4	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	339		58,534	Note: NESS findings based on fewer than 100 cases
Total number of hard to fill vacancies	115		20,453	
Hard to fill vacancies as % of all vacancies	34		35	
Hard to fill vacancies as % of employment	0.4		0.9	
Skill shortage vacancies	69		12,734	
% of vacancies that are SSVs	20		22	
Skill shortage vacancies per 1,000 employees	3		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	15		16	
Number of employees not fully proficient	590		137,036	
% of staff reported as having skills gaps	2		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	75		68	
Trainees as % of workforce	44		65	
Average days training per head of workforce	4		8	
Awareness of Train to Gain	15		27	
Involvement with Train to Gain	0		4	

E-SKILLS UK

e-skills is the Sector Skills Council for Information technology and telecommunications and the lead body for contact centres (www.e-skills.com)

SIC 2003: 22.33, 64.2, 72, 74.86 (NOTE: 74.86 is not included in APS data – none on file) .

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	53,800		2,190,300	
Share of regional employment	2.5			
Number of businesses	10,500		215,100	
Share of regional business base	4.9			
Average no. of employees	5		10	
Workforce characteristics				APS 2006
% Male	74		54	
% Female	26		46	
% of working age who are self-employed	10		15	
Full time	87		72	
Part time	13		28	
Occupational breakdown				APS 2006
Managers and senior officials	19,117	33	16	
Professionals	18,202	32	12	
Associate professionals	8,259	14	15	
Administrative and secretarial occupations	4,146	7	11	
Skilled trades occupations	4,292	7	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	3,712	5	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	0	0	12	
All	57,728	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	29,103	50.4	31.8	
Level 3	12,087	20.9	22.8	
Level 2	8,508	14.7	21.8	
None or below Level 2	8,033	13.9	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	2009		58,534	
Total number of hard to fill vacancies	656		20,453	
Hard to fill vacancies as % of all vacancies	33		35	
Hard to fill vacancies as % of employment	1.3		0.9	
Skill shortage vacancies	511		12,734	
% of vacancies that are SSVs	25		22	
Skill shortage vacancies per 1,000 employees	10		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	11		16	
Number of employees not fully proficient	6870		137,036	
% of staff reported as having skills gaps	14		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	69		68	
Trainees as % of workforce	71		65	
Average days training per head of workforce	9		8	
Awareness of Train to Gain	29		27	
Involvement with Train to Gain	6		4	

FINANCIAL SERVICES SKILLS COUNCIL				
Financial Services Skills Council is the Sector Skills Council for the financial services industry (www.fssc.org.uk)				
SIC 2003: 65-67				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	79,000		2,190,300	
Share of regional employment	3.6			
Number of businesses	4,500		215,100	
Share of regional business base	2.1			
Average no. of employees	18		10	
Workforce characteristics				APS 2006
% Male	48		54	
% Female	52		46	
% of working age who are self-employed	6		15	
Full time	81		72	
Part time	19		28	
Occupational breakdown				APS 2006
Managers and senior officials	24,707	23	16	
Professionals	11,734	11	12	
Associate professionals	25,734	24	15	
Administrative and secretarial occupations	36,383	34	11	
Skilled trades occupations	0	0	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	7,474	7	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	1,996	2	12	
All	108,028	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	33,179	30.7	31.8	
Level 3	36,091	33.4	22.8	
Level 2	22,940	21.2	21.8	
None or below Level 2	15,819	14.7	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,629		58,534	
Total number of hard to fill vacancies	538		20,453	
Hard to fill vacancies as % of all vacancies	33		35	
Hard to fill vacancies as % of employment	0.7		0.9	
Skill shortage vacancies	361		12,734	
% of vacancies that are SSVs	22		22	
Skill shortage vacancies per 1,000 employees	5		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	17		16	
Number of employees not fully proficient	3,081		137,036	
% of staff reported as having skills gaps	4		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	83		68	
Trainees as % of workforce	53		65	
Average days training per head of workforce	8		8	
Awareness of Train to Gain	27		27	
Involvement with Train to Gain	3		4	

GoSkills				
GoSkills is the Sector Skills Council for passenger transport (www.goskills.org)				
SIC 2003: 60.1, 60.21, 60.22, 60.23, 61.1, 61.2, 62.1, 62.2, 63.21, 63.22, 63.23, 80.41				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	28,400		2,190,300	
Share of regional employment	1.3			
Number of businesses	2,100		215,100	
Share of regional business base	1.0			
Average no. of employees	13		10	
Workforce characteristics				APS 2006
% Male	80		54	Caution: Findings based on sub-samples < 100
% Female	20		46	
% of working age who are self-employed	26		15	
Full time	88		72	
Part time	12		28	
Occupational breakdown				APS 2006
Managers and senior officials	4,211	10	16	Caution: Findings based on sub-samples < 100
Professionals	487	1	12	
Associate professionals	6,504	16	15	
Administrative and secretarial occupations	4,808	12	11	
Skilled trades occupations	1,004	2	12	
Personal service occupations	3,131	8	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	18,952	47	6	
Elementary occupations	1,459	4	12	
All	40,556	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	8,491	20.9	31.8	
Level 3	7,994	19.7	22.8	
Level 2	12,217	30.1	21.8	
None or below Level 2	11,854	20.8	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,031		58,534	
Total number of hard to fill vacancies	498		20,453	
Hard to fill vacancies as % of all vacancies	48		35	
Hard to fill vacancies as % of employment	1.7		0.9	
Skill shortage vacancies	351		12,734	
% of vacancies that are SSVs	34		22	
Skill shortage vacancies per 1,000 employees	12		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	13		16	
Number of employees not fully proficient	1,072		137,036	
% of staff reported as having skills gaps	4		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	60		68	
Trainees as % of workforce	51		65	
Average days training per head of workforce	4		8	
Awareness of Train to Gain	33		27	
Involvement with Train to Gain	5		4	

GOVERNMENT SKILLS				
Government Skills is the Sector Skills Council for central government (www.government-skills.gov.uk)				
SIC 2003: 75.1, 75.21, 75.22, 75.3				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	105,000		2,190,300	
Share of regional employment	4.8			
Number of businesses	1,900		215,100	
Share of regional business base	0.9			
Average no. of employees	55		10	
Workforce characteristics				APS 2006
% Male	56		54	
% Female	44		46	
% of working age who are self-employed	1		15	
Full time	84		72	
Part time	16		28	
Occupational breakdown				APS 2006
Managers and senior officials	22,592	17	16	
Professionals	17,598	13	12	
Associate professionals	40,087	30	15	
Administrative and secretarial occupations	38,076	29	11	
Skilled trades occupations	4,613	3	12	
Personal service occupations	2,513	2	8	
Sales and customer service occupations	2,213	2	8	
Process, plant and machine operatives	1,469	1	6	
Elementary occupations	3,115	2	12	
All	132,276	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	63,239	47.8	31.8	
Level 3	28,136	21.3	22.8	
Level 2	20,948	15.8	21.8	
None or below Level 2	19,954	15.1	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	587		58,534	Note: NESS findings based on fewer than 100 cases
Total number of hard to fill vacancies	336		20,453	
Hard to fill vacancies as % of all vacancies	57		35	
Hard to fill vacancies as % of employment	0.8		0.9	
Skill shortage vacancies	32		12,734	
% of vacancies that are SSVs	5		22	
Skill shortage vacancies per 1,000 employees	1		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	34		16	
Number of employees not fully proficient	2,670		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	90		68	
Trainees as % of workforce	66		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	30		27	
Involvement with Train to Gain	12		4	

IMPROVE LTD

Improve Ltd is the Sector Skills Council for food and drink manufacturing and processing (www.improveltd.co.uk)

SIC 2003: 15, 51.38 (NOTE: 51.38 not included in APS analysis as data not available at this level)

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	38,000		2,190,300	
Share of regional employment	0.5			
Number of businesses	1,200		215,100	
Share of regional business base	0.5			
Average no. of employees	33		10	
Workforce characteristics				APS 2006
% Male	65		54	Caution: Findings based on sub-samples < 100
% Female	35		46	
% of working age who are self-employed	3		15	
Full time	90		72	
Part time	10		28	
Occupational breakdown				APS 2006
Managers and senior officials	5,725	20	16	Caution: Findings based on sub-samples < 100
Professionals	1,028	4	12	
Associate professionals	1,245	4	15	
Administrative and secretarial occupations	1,510	5	11	
Skilled trades occupations	3,898	13	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	838	3	8	
Process, plant and machine operatives	8,832	30	6	
Elementary occupations	6,256	21	12	
All	29,332	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	5,390	18.4	31.8	
Level 3	4,435	15.1	22.8	
Level 2	9,181	31.3	21.8	
None or below Level 2	10,326	35.2	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	786		58,534	
Total number of hard to fill vacancies			20,453	
Hard to fill vacancies as % of all vacancies			35	
Hard to fill vacancies as % of employment			0.9	
Skill shortage vacancies	46		12,734	
% of vacancies that are SSVs	6		22	
Skill shortage vacancies per 1,000 employees	1		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	21		16	
Number of employees not fully proficient	1,234		137,036	
% of staff reported as having skills gaps	3		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	66		68	
Trainees as % of workforce	58		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	33		27	
Involvement with Train to Gain	9		4	

LANTRA				
Lantra is the Sector Skills Council for the environmental and land based sector. (www.lantra.co.uk)				
SIC 2003: 1, 2, 5.02, 20.1, 29.3, 85.2 and 92.53.				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	12,000*		2,190,300	
Share of regional employment	0.5			
Number of businesses	1,600*		215,100	
Share of regional business base	0.8			
Average no. of employees	7		10	
Workforce characteristics				APS 2006
% Male	73		54	
% Female	27		46	
% of working age who are self-employed	52		15	
Full time	78		72	
Part time	22		28	
Occupational breakdown				APS 2006
Managers and senior officials	4,834	10	16	
Professionals	2,167	4	12	
Associate professionals	1,554	3	15	
Administrative and secretarial occupations	2,963	6	11	
Skilled trades occupations	19,899	40	12	
Personal service occupations	6,402	13	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	1,883	4	6	
Elementary occupations	9,443	19	12	
All	**49,145**	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	15,001	30.5	31.8	
Level 3	10,065	20.5	22.8	
Level 2	9,965	20.3	21.8	
None or below Level 2	14,114	28.7	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,485		58,534	
Total number of hard to fill vacancies	825		20,453	
Hard to fill vacancies as % of all vacancies	56		35	
Hard to fill vacancies as % of employment	1.5		0.9	
Skill shortage vacancies	577		12,734	
% of vacancies that are SSVs	39		22	
Skill shortage vacancies per 1,000 employees	11		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	12		16	
Number of employees not fully proficient	3,114		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	48		68	
Trainees as % of workforce	43		65	
Average days training per head of workforce	4		8	
Awareness of Train to Gain	18		27	
Involvement with Train to Gain	2		4	

- Note: ABI data excludes farm-based employment and self-employment.

LIFELONG LEARNING UK

Lifelong Learning UK is the Sector Skills Council for employers who deliver and/or support the delivery of lifelong learning including library and information services (www.lifelonglearninguk.org)

SIC 2003: 80.22, 80.3, 80.42, 92.51

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	78,100		2,190,300	
Share of regional employment	3.6			
Number of businesses	3,000		215,100	
Share of regional business base	1.4			
Average no. of employees	26		10	
Workforce characteristics				APS 2006
% Male	39		54	
% Female	61		46	
% of working age who are self-employed	13		15	
Full time	61		72	
Part time	39		28	
Occupational breakdown				APS 2006
Managers and senior officials	3,644	5	16	
Professionals	35,334	44	12	
Associate professionals	15,927	20	15	
Administrative and secretarial occupations	12,255	15	11	
Skilled trades occupations	580	1	12	
Personal service occupations	9,377	12	8	
Sales and customer service occupations	694	1	8	
Process, plant and machine operatives	537	1	6	
Elementary occupations	2,459	3	12	
All	80,807	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	49,343	61.1	31.8	
Level 3	12,462	15.4	22.8	
Level 2	10,609	13.1	21.8	
None or below Level 2	8,394	10.4	24.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,745		58,534	
Total number of hard to fill vacancies	353		20,453	
Hard to fill vacancies as % of all vacancies	20		35	
Hard to fill vacancies as % of employment	0.5		0.9	
Skill shortage vacancies	228		12,734	
% of vacancies that are SSVs	13		22	
Skill shortage vacancies per 1,000 employees	3		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	17		16	
Number of employees not fully proficient	4,131		137,036	
% of staff reported as having skills gaps	5		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	84		68	
Trainees as % of workforce	81		65	
Average days training per head of workforce	7		8	
Awareness of Train to Gain	57		27	
Involvement with Train to Gain	21		4	

PEOPLE 1st				
People 1st is the Sector Skills Council for the hospitality, leisure, travel and tourism industries (www.people1st.co.uk)				
SIC 2003: 55.1, 55.21, 55.23, 55.3-55.5, 63.3, 92.33, 92.71				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	183,800		2,190,300	
Share of regional employment	8.4			
Number of businesses	18,400		215,100	
Share of regional business base	8.6			
Average no. of employees	10		10	
Workforce characteristics				APS 2006
% Male	46		54	
% Female	54		46	
% of working age who are self-employed	12		15	
Full time	55		72	
Part time	45		28	
Occupational breakdown				APS 2006
Managers and senior officials	35,702	26	16	
Professionals	0	0	12	
Associate professionals	1,609	1	15	
Administrative and secretarial occupations	5,144	4	11	
Skilled trades occupations	18,184	13	12	
Personal service occupations	7,870	6	8	
Sales and customer service occupations	6,734	5	8	
Process, plant and machine operatives	2,902	2	6	
Elementary occupations	60,272	44	12	
All	138,417	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	18,827	13.6	31.8	
Level 3	43,034	31.1	22.8	
Level 2	35,063	25.3	21.8	
Below Level 2	41,494	30.0	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	6,562		58,534	
Total number of hard to fill vacancies	2664		20,453	
Hard to fill vacancies as % of all vacancies	41		35	
Hard to fill vacancies as % of employment	1.5		0.9	
SSVs	1,332		12,734	
% of vacancies that are SSVs	20		22	
Skill shortage vacancies per 1,000 employees	8		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	22		16	
Number of employees not fully proficient	25,508		137,036	
% of staff reported as having skills gaps	15		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	70		68	
Trainees as % of workforce	63		65	
Average days training per head of workforce	8		8	
Awareness of Train to Gain	25		27	
Involvement with Train to Gain	5		4	

PROSKILLS UK

Proskills is the Sector Skills Council for process and manufacturing industries (www.proskills.co.uk)

SIC 2003: 10, 12-14, 21.24, 22.2, 24.3, 26.1, 26.26, 26.4, 26.5, 26.6, 26.7, 26.8

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	28,700		2,190,300	
Share of regional employment	1.3			
Number of businesses	2,600		215,100	
Share of regional business base	1.2			
Average no. of employees	11		10	
Workforce characteristics				APS 2006
% Male	77		54	Caution: Findings based on sub-samples < 100
% Female	23		46	
% of working age who are self-employed	6		15	
Full time	90		72	
Part time	10		28	
Occupational breakdown				APS 2006
Managers and senior officials	3,339	15	16	Caution: Findings based on sub-samples < 100
Professionals	504	2	12	
Associate professionals	2,304	10	15	
Administrative and secretarial occupations	2,302	10	11	
Skilled trades occupations	4,819	21	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	946	4	8	
Process, plant and machine operatives	5,985	26	6	
Elementary occupations	2,487	11	12	
All	22,686	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	5,426	23.5	31.8	
Level 3	6,025	26.1	22.8	
Level 2	3,414	14.8	21.8	
Below Level 2	8,243	35.7	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	498		58,534	
Total number of hard to fill vacancies	193		20,453	
Hard to fill vacancies as % of all vacancies	39		35	
Hard to fill vacancies as % of employment	0.7		0.9	
SSVs	111		12,734	
% of vacancies that are SSVs	22		22	
Skill shortage vacancies per 1,000 employees	4		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	19		16	
Number of employees not fully proficient	1,977		137,036	
% of staff reported as having skills gaps	7		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	66		68	
Trainees as % of workforce	58		65	
Average days training per head of workforce	6		8	
Awareness of Train to Gain	27		27	
Involvement with Train to Gain	3		4	

SEMTA				
SEMTA is the Sector Skills Council for science, engineering and manufacturing technologies (www.semta.org.uk)				
SIC 2003: 25.11, 25.12, 27-35, 51.52, 51.57, 73.10 (NOTE: 51.52 not in APS analysis, none on file)				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	126,700		2,190,300	
Share of regional employment	5.8			
Number of businesses	6,100		215,100	
Share of regional business base	2.8			
Average no. of employees	21		10	
Workforce characteristics				APS 2006
% Male	82		54	
% Female	18		46	
% of working age who are self-employed	4		15	
Full time	93		72	
Part time	7		28	
Occupational breakdown				APS 2006
Managers and senior officials	31,728	21	16	
Professionals	24,209	16	12	
Associate professionals	17,657	12	15	
Administrative and secretarial occupations	10,064	7	11	
Skilled trades occupations	35,141	23	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	1,443	1	8	
Process, plant and machine operatives	24,639	16	6	
Elementary occupations	7,199	5	12	
All	152,080	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	52,717	34.6	31.8	
Level 3	37,618	24.7	22.8	
Level 2	28,453	18.7	21.8	
Below Level 2	33,719	22.1	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	2,147		58,534	
Total number of hard to fill vacancies	859		20,453	
Hard to fill vacancies as % of all vacancies	40		35	
Hard to fill vacancies as % of employment	0.7		0.9	
SSVs	723		12,734	
% of vacancies that are SSVs	34		22	
Skill shortage vacancies per 1,000 employees	6		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	19		16	
Number of employees not fully proficient	10,983		137,036	
% of staff reported as having skills gaps	8		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	67		68	
Trainees as % of workforce	56		65	
Average days training per head of workforce	6		8	
Awareness of Train to Gain	32		27	
Involvement with Train to Gain	6		4	

SKILLFAST-UK

Skillfast-UK is the Sector Skills Council for apparel, footwear and textiles and related businesses (www.skillfast-uk.org)

SIC 2003: 17-19, 24.7, 51.16, 51.24, 51.41, 51.42, 52.71, 93.01 (NOTE: 51.16, 51.24, 51.41, 51.42 not included in APS analysis as data not available at this level of detail)

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	14,100		2,190,300	
Share of regional employment	0.6			
Number of businesses	1,600		215,100	
Share of regional business base	0.7			
Average no. of employees	9		10	
Workforce characteristics				APS 2006
% Male	65		54	Caution: Findings based on sub-samples < 100
% Female	35		46	
% of working age who are self-employed	13		15	
Full time	86		72	
Part time	14		28	
Occupational breakdown				APS 2006
Managers and senior officials	3,071	22	16	Caution: Findings based on sub-samples < 100
Professionals	0	0	12	
Associate professionals	530	4	15	
Administrative and secretarial occupations	459	3	11	
Skilled trades occupations	2,472	17	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	1,137	8	8	
Process, plant and machine operatives	4,242	30	6	
Elementary occupations	2,359	17	12	
All	14,270	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	993	7.0	31.8	
Level 3	2,648	18.6	22.8	
Level 2	3,607	25.3	21.8	
Below Level 2	7,022	49.2	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	341		58,534	
Total number of hard to fill vacancies	129		20,453	
Hard to fill vacancies as % of all vacancies	38		35	
Hard to fill vacancies as % of employment	0.9		0.9	
SSVs	93		12,734	
% of vacancies that are SSVs	27		22	
Skill shortage vacancies per 1,000 employees	6		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	15		16	
Number of employees not fully proficient	715		137,036	
% of staff reported as having skills gaps	5		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	54		68	
Trainees as % of workforce	40		65	
Average days training per head of workforce	4		8	
Awareness of Train to Gain	31		27	
Involvement with Train to Gain	6		4	

SKILLS FOR CARE AND DEVELOPMENT

Skills for Care and Development is the Sector Skills Council for social care, children and young people (www.skillsforcareanddevelopment.org.uk)

SIC 2003: 85.3

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	104,200		2,190,300	
Share of regional employment	4.8			
Number of businesses	6,800		215,100	
Average no. of employees	15		10	
Share of regional business base	3.1			
Workforce characteristics				APS 2006
% Male	14		54	Caution: Findings based on sub-samples < 100
% Female	86		46	
% of working age who are self-employed	10		15	
Full time	53		72	
Part time	47		28	
Occupational breakdown				APS 2006
Managers and senior officials	9,845	9	16	Caution: Findings based on sub-samples < 100
Professionals	9,036	8	12	
Associate professionals	19,870	17	15	
Administrative and secretarial occupations	9,621	8	11	
Skilled trades occupations	2,468	2	12	
Personal service occupations	54,217	48	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	1,371	1	6	
Elementary occupations	7,201	6	12	
All	113,629	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	33,108	29.1	31.8	
Level 3	25,977	22.9	22.8	
Level 2	28,402	25.0	21.8	
Below Level 2	26,142	23.0	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	3,342		58,534	
Total number of hard to fill vacancies	1,026		20,453	
Hard to fill vacancies as % of all vacancies	1.1		35	
Hard to fill vacancies as % of employment	31		0.9	
SSVs	594		12,734	
% of vacancies that are SSVs	18		22	
Skill shortage vacancies per 1,000 employees	6		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	19		16	
Number of employees not fully proficient	6,080		137,036	
% of staff reported as having skills gaps	6		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	91		68	
Trainees as % of workforce	91		65	
Average days training per head of workforce	15		8	
Awareness of Train to Gain	44		27	
Involvement with Train to Gain	17		4	

SKILLS FOR HEALTH				
Skills for Health is the Sector Skills Council for the health sector across the UK (www.skillsforhealth.org.uk)				
SIC 2003: 85.1				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	182,000		2,190,300	
Share of regional employment	8.3			
Number of businesses	5,300		215,100	
Share of regional business base	2.4			
Average no. of employees	35		10	
Workforce characteristics				APS 2006
% Male	20		54	
% Female	80		46	
% of working age who are self-employed	8		15	
Full time	58		72	
Part time	42		28	
Occupational breakdown				APS 2006
Managers and senior officials	11,056	7	16	
Professionals	24,305	15	12	
Associate professionals	65,572	39	15	
Administrative and secretarial occupations	18,301	11	11	
Skilled trades occupations	1,929	1	12	
Personal service occupations	34,969	21	8	
Sales and customer service occupations	1,348	1	8	
Process, plant and machine operatives	459	0	6	
Elementary occupations	9,166	5	12	
All	167,105	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	97,035	58.1	31.8	
Level 3	18,223	10.9	22.8	
Level 2	26,541	15.9	21.8	
Below Level 2	25,306	15.2	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	3,825		58,534	
Total number of hard to fill vacancies	1,760		20,453	
Hard to fill vacancies as % of all vacancies	46		35	
Hard to fill vacancies as % of employment	1.0		0.9	
SSVs	706		12,734	
% of vacancies that are SSVs	18		22	
Skill shortage vacancies per 1,000 employees	4		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	20		16	
Number of employees not fully proficient	5,563		137,036	
% of staff reported as having skills gaps	3		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	89		68	
Trainees as % of workforce	100		65	
Average days training per head of workforce	12		8	
Awareness of Train to Gain	40		27	
Involvement with Train to Gain	18		4	

SKILLS FOR JUSTICE				
Skills for Justice is the Sector Skills Council for custodial care, community justice, court and prosecution services, policing and law enforcement (www.skillsforjustice.com)				
SIC 2003: 75.23, 75.24				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	25,500		2,190,300	
Share of regional employment	1.2			
Number of businesses	300		215,100	
Average no. of employees	79		10	
Share of regional business base	0.1			
Workforce characteristics				APS 2006
% Male	69		54	Caution: Findings based on sub-samples < 100
% Female	31		46	
% of working age who are self-employed	0		15	
Full time	86		72	
Part time	14		28	
Occupational breakdown				APS 2006
Managers and senior officials	2,362	9	16	Caution: Findings based on sub-samples < 100
Professionals	1,589	6	12	
Associate professionals	16,330	59	15	
Administrative and secretarial occupations	4,817	17	11	
Skilled trades occupations	0	0	12	
Personal service occupations	956	3	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	1,495	5	12	
All	27,549	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	7,716	28.0	31.8	
Level 3	6,121	22.2	22.8	
Level 2	7,992	29.0	21.8	
Below Level 2	5,721	20.7	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	325		58,534	Note: NESS findings based on fewer than 100 cases
Total number of hard to fill vacancies	20		20,453	
Hard to fill vacancies as % of all vacancies	0.1		35	
Hard to fill vacancies as % of employment	6		0.9	
SSVs	8		12,734	
% of vacancies that are SSVs	2		22	
Skill shortage vacancies per 1,000 employees	0		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	20		16	
Number of employees not fully proficient	528		137,036	
% of staff reported as having skills gaps	2		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	100		68	
Trainees as % of workforce	71		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	27		27	
Involvement with Train to Gain	5		4	

SKILLS FOR LOGISTICS

Skills for Logistics is the Sector Skills Council for the freight logistics industry (www.skillsforlogistics.org)

SIC 2003: 60.24, 63.1, 63.4, 64.1

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	57,000		2,190,300	
Share of regional employment	2.6			
Number of businesses	5,400		215,100	
Share of regional business base	2.5			
Average no. of employees	11		10	
Workforce characteristics				APS 2006
% Male	77		54	
% Female	23		46	
% of working age who are self-employed	6		15	
Full time	91		72	
Part time	9		28	
Occupational breakdown				APS 2006
Managers and senior officials	9,013	12	16	
Professionals	0	0	12	
Associate professionals	1,944	3	15	
Administrative and secretarial occupations	7,961	11	11	
Skilled trades occupations	1,520	2	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	1,439	2	8	
Process, plant and machine operatives	19,203	25	6	
Elementary occupations	34,767	46	12	
All	75,867	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	5,410	7.1	31.8	
Level 3	15,660	20.6	22.8	
Level 2	21,795	28.7	21.8	
Below Level 2	33,002	43.5	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	1,398		58,534	
Total number of hard to fill vacancies	321		20,453	
Hard to fill vacancies as % of all vacancies	23		35	
Hard to fill vacancies as % of employment	0.6		0.9	
SSVs	117		12,734	
% of vacancies that are SSVs	8		22	
Skill shortage vacancies per 1,000 employees	2		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	14		16	
Number of employees not fully proficient	2,943		137,036	
% of staff reported as having skills gaps	5		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	64		68	
Trainees as % of workforce	73		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	29		27	
Involvement with Train to Gain	5		4	

SKILLSACTIVE				
SkillsActive is the Sector Skills Council for leisure and learning (www.skillsactive.com)				
SIC 2003: 55.22, 92.6, 93.04				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	26,900		2,190,300	
Share of regional employment	1.2			
Number of businesses	2,800		215,100	
Average no. of employees	10		10	
Share of regional business base	1.3			
Workforce characteristics				APS 2006
% Male	53		54	
% Female	47		46	
% of working age who are self-employed	17		15	
Full time	65		72	
Part time	35		28	
Occupational breakdown				APS 2006
Managers and senior officials	3,780	14	16	
Professionals	0	0	12	
Associate professionals	12,104	45	15	
Administrative and secretarial occupations	2,430	9	11	
Skilled trades occupations	2,615	10	12	
Personal service occupations	4,291	16	8	
Sales and customer service occupations	380	1	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	1,439	5	12	
All	27,039	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	7,836	29.0	31.8	
Level 3	3,715	13.7	22.8	
Level 2	9,369	34.7	21.8	
Below Level 2	6,119	22.6	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	861		58,534	
Total number of hard to fill vacancies	230		20,453	
Hard to fill vacancies as % of all vacancies	27		35	
Hard to fill vacancies as % of employment	0.8		0.9	
SSVs	125		12,734	
% of vacancies that are SSVs	15		22	
Skill shortage vacancies per 1,000 employees	4		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	16		16	
Number of employees not fully proficient	2,360		137,036	
% of staff reported as having skills gaps	8		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	75		68	
Trainees as % of workforce	64		65	
Average days training per head of workforce	8		8	
Awareness of Train to Gain	23		27	
Involvement with Train to Gain	5		4	

SKILLSET				
Skillset is the Sector Skills Council for the Audio visual industries (www.skillset.org)				
SIC 2003: 22.32, 24.64, 74.81, 92.1, 92.2 NOTE: it is not possible to isolate photo imaging. Self employed people are excluded from NESS07/ABI but represent most of the sector in areas such as film production and independent production. As a result, the data should be used with caution)				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	8,100		2,190,300	
Share of regional employment	0.4			
Number of businesses	1,600		215,100	
Share of regional business base	0.8			
Average no. of employees	5		10	
Workforce characteristics				APS 2006
% Male	72		54	
% Female	28		46	
% of working age who are self-employed	40		15	
Full time	70		72	
Part time	30		28	
Occupational breakdown				APS 2006
Managers and senior officials	442	4	16	
Professionals	0	0	12	
Associate professionals	6,296	63	15	
Administrative and secretarial occupations	1,097	11	11	
Skilled trades occupations	0	0	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	963	10	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	1,119	11	12	
All	9,917	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	2,992	30.2	31.8	
Level 3	2,981	30.1	22.8	
Level 2	3,045	30.7	21.8	
Below Level 2	899	9.1	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	121		58,534	
Total number of hard to fill vacancies	54		20,453	
Hard to fill vacancies as % of all vacancies	45		35	
Hard to fill vacancies as % of employment	0.6		0.9	
SSVs	48		12,734	
% of vacancies that are SSVs	40		22	
Skill shortage vacancies per 1,000 employees	6		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	13		16	
Number of employees not fully proficient	277		137,036	
% of staff reported as having skills gaps	3		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	59		68	
Trainees as % of workforce	57		65	
Average days training per head of workforce	5		8	
Awareness of Train to Gain	21		27	
Involvement with Train to Gain	1		4	

SKILLSMART RETAIL				
Skillsmart Retail is the Sector Skills Council for the retail sector (www.skillsmartretail.com)				
SIC 2003: 52.1-52.6				
	Number	**%**	**South West Total**	**Source**
Employment				ABI 2006
Employment	253,300		2,190,300	
Share of regional employment	11.6			
Number of businesses	26,200		215,100	
Share of regional business base	12.2			
Average no. of employees	10		10	
Workforce characteristics				APS 2006
% Male	38		54	
% Female	62		46	
% of working age who are self-employed	7		15	
Full time	49		72	
Part time	51		28	
Occupational breakdown				APS 2006
Managers and senior officials	53,822	21	16	
Professionals	5,269	2	12	
Associate professionals	10,954	4	15	
Administrative and secretarial occupations	14,215	6	11	
Skilled trades occupations	7,940	3	12	
Personal service occupations	427	0	8	
Sales and customer service occupations	128,728	51	8	
Process, plant and machine operatives	6,229	2	6	
Elementary occupations	25,469	10	12	
All	253,053	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				
Level 4 and above	31,230	12.3	31.8	
Level 3	62,397	24.7	22.8	
Level 2	74,599	29.5	21.8	
Below Level 2	84,828	23.9	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	6,646		58,534	
Total number of hard to fill vacancies	1,455		20,453	
Hard to fill vacancies as % of all vacancies	22		35	
Hard to fill vacancies as % of employment	0.6		0.9	
SSVs	790		12,734	
% of vacancies that are SSVs	12		22	
Skill shortage vacancies per 1,000 employees	3		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	20		16	
Number of employees not fully proficient	19,829		137,036	
% of staff reported as having skills gaps	8		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	63		68	
Trainees as % of workforce	59		65	
Average days training per head of workforce	10		8	
Awareness of Train to Gain	25		27	
Involvement with Train to Gain	3		4	

SUMMITSKILLS

Summit Skills is the Sector Skills Council for the building engineering industry (www.summitskills.org.uk)

SIC 2003: 45.31, 45.33, 31.1; 31.62; 33.3; 52.72 (NOTE: 45.31, 45.33 not included in APS analysis as data not available at this level)

	Number	%	South West Total	Source
Employment				ABI 2006
Employment	20,600		2,190,300	
Share of regional employment	0.9			
Number of businesses	5,700		215,100	
Share of regional business base	2.7			
Average no. of employees	4		10	
Workforce characteristics				APS 2006
% Male	74		54	Caution: Findings based on sub-samples < 100
% Female	26		46	
% of working age who are self-employed	50		15	
Full time	74		72	
Part time	26		28	
Occupational breakdown				APS 2006
Managers and senior officials	496	25	16	Caution: Findings based on sub-samples < 100
Professionals	479	25	12	
Associate professionals	0	0	15	
Administrative and secretarial occupations	515	26	11	
Skilled trades occupations	456	23	12	
Personal service occupations	0	0	8	
Sales and customer service occupations	0	0	8	
Process, plant and machine operatives	0	0	6	
Elementary occupations	0	0	12	
All	1,946	100	100	
Workforce qualifications				APS 2006
% Staff qualified to:				Caution: Findings based on sub-samples < 100
Level 4 and above	0	0	31.8	
Level 3	1192	61.2	22.8	
Level 2	240	12.3	21.8	
Below Level 2	515	26.5	18.0	
Skills shortages				NESS 2007
Total no. of vacancies	439		58,534	
Total number of hard to fill vacancies	224		20,453	
Hard to fill vacancies as % of all vacancies	51		35	
Hard to fill vacancies as % of employment	1.2		0.9	
SSVs	160		12,734	
% of vacancies that are SSVs	36		22	
Skill shortage vacancies per 1,000 employees	9		6	
Skills Gaps				NESS 2007
% of employers with skills gaps	21		16	
Number of employees not fully proficient	1,537		137,036	
% of staff reported as having skills gaps	8		6	
Training				NESS 2007
Proportion of employers providing training within past 12 months	68		68	
Trainees as % of workforce	44		65	
Average days training per head of workforce	8		8	
Awareness of Train to Gain	24		27	
Involvement with Train to Gain	2		4	

Annex 2: NVQ equivalents

This table maps out the various qualifications accepted as equivalent of NVQs

Level	Academic NVQ Qualification Name	Vocational Qualification Name
Level 1	GCSE/SCE/O-level grades below C (or fewer than 5 at grades A-C) CSE grades below 1 1 AS level	BTEC/SCOTBTEC/SQA-First Certificate BEC/SCOTBEC – General Certificate / Diploma City & Guilds – Operative Awards CPVE- Year 1 (Technician) LCCI/RSA/PEI – Elementary/ First Level RSA- Vocational Certificate Foundation GNVQ/GSVQ NVQ/SVQ Level 1
Level 2	5 or more GCSE/SCE/O-level grades at A – C CSE grade 1 1 A level pass 2 or 3 AS levels	BTEC/SCOTVEC/SQA-First Diploma BEC/SCOTBEC/BTEC/SCOTVEC/SQA – General Certificate / Diploma with credit City & Guilds – Higher Operative / craft LCCI – Certificate / Second Level PEI – Stage 2 Pitmans – Intermediate Level 2 Diploma Certificate RSA- Diploma Intermediate GNVQ/GSVQ NVQ/SVQ Level 2
Level 3	2 or more A level passes 4 or more AS levels	BEC/SCOTBEC BTEC/SCOTVEC/SQA – National OND TEC/SCOTEC – Certificate / Diploma City & Guilds – Advanced Craft LCCI – Third level Diploma Pitmans – Level 3 Advanced Higher Certificate RSA- Stage 3 Advanced Diploma Advanced GNVQ/GSVQ Access to Higher Education Courses Advanced awards in ESOL and foreign languages NVQ/SVQ Level 3
Level 4	Teaching qualifications (including PGCE) First degree	BEC/SCOTBEC BTEC/SCOTVEC/SQA – HND / HNC TEC/SCOTEC – Higher Certificate / Diploma LCCI – Advanced level RSA - Advanced Certificate/ Higher Diploma Diploma in Higher Education Nursing (SRN) Certificate in Higher Education NVQ/SVQ Level 4
Level 5	Higher degree	Continuing Education Diploma Other high level professional qualification

Annex 3: Hard to fill vacancies as a proportion of employment and as a proportion of all vacancies by region (NESS 07)

	HtFV as % of emp	HtFVs as % of all vacancies
East Midlands	**0.7**	**30%**
East of England	**0.8**	**30%**
London	**1.0**	**32%**
North East	**0.7**	**30%**
North West	**0.6**	**31%**
South East	**1.0**	**35%**
West Midlands	**0.6**	**24%**
Yorkshire & the Humber	**0.7**	**28%**
England	**0.8**	**30%**
South West	**0.9**	**35%**

Annex 4: Main skills gaps by SSC

	General IT user skills	IT professional skills	Oral communication skills	Written communication skills	Customer handling skills	Team working skills	Foreign language skills	Problem solving skills	Management skills	Numeracy skills	Literacy skills	Customer handling skills	Technical, practical or job-specific skills
Lantra	21	12	12	12	20	33	20	25	16	8	8	13	50
Cogent	8	5	17	24	41	30	1	32	10	3	11	5	33
Proskills	7	4	10	7	9	21	7	7	8	6	4	8	76
Improve	12	4	21	9	14	35	22	16	15	2	4	6	67
Skillfast-UK	10	7	40	10	11	48	4	33	15	3	2	13	65
SEMTA	13	9	17	17	10	20	6	22	15	11	10	3	80
Energy & Utility Skills	*11*	*3*	*21*	*37*	*21*	*12*	*12*	*24*	*12*	*16*	*19*	*28*	*28*
ConstructionSkills	12	13	27	12	12	28	1	30	25	7	8	13	55
SummitSkills	8	23	7	14	15	18	1	19	10	5	9	8	55
Automotive Skills	13	15	17	8	39	27	3	24	19	9	9	14	57
Skillsmart Retail	13	4	32	16	55	36	2	31	21	13	12	7	45
People 1st	5	3	35	18	54	40	11	29	11	16	15	7	48
Goskills	4	3	28	12	44	70	18	32	22	0	0	21	63
Skills for Logistics	17	10	24	7	16	24	8	9	17	6	4	7	40
Financial Services	9	13	44	14	47	11	11	5	10	0	2	8	28
Asset Skills	45	35	62	16	48	40	3	19	44	30	32	8	25
e-skills UK	17	13	3	12	21	17	1	4	20	2	7	9	80
Government Skills	*58*	*52*	*65*	*64*	*28*	*25*	*0*	*34*	*28*	*54*	*50*	*20*	*61*
Skills for Justice	*16*	*44*	*46*	*64*	*43*	*11*	*0*	*82*	*68*	*13*	*26*	*68*	*14*
Lifelong Learning UK	24	13	32	8	16	29	3	33	31	1	2	16	58
Skills for Health	21	13	45	32	44	33	16	28	16	7	19	10	46
Skills for Care and Development	27	7	40	41	30	50	2	40	27	7	22	11	62
Skillset	4	3	7	6	7	37	1	30	6	5	5	7	80
Creative and Cultural	28	27	35	20	23	29	11	13	37	6	4	15	48
SkillsActive	15	11	26	14	51	18	11	29	18	15	17	17	62
Non-SSC employers	24	18	26	31	36	34	7	24	29	11	14	21	49
Total	**16**	**11**	**28**	**20**	**35**	**31**	**6**	**25**	**20**	**11**	**13**	**35**	**53**

Source: NESS2007

Top 3 skills gaps in each SSC

Annex 5: Sophistication of business planning (NESS07)

	Highly sophisticated (all plans)	Sophisticated (2 plans)	Unsophisticated (no plans)	Provides staff with APR	Formally assesses skills gaps	Measures impact of training
Lantra	10	16	43	32	37	50
Cogent	20	25	28	61	59	63
Proskills	12	19	43	53	51	59
Improve	20	20	35	51	52	62
Skillfast-UK	15	17	39	52	49	63
SEMTA	21	16	37	57	48	64
Energy & Utility Skills	27	21	27	58	53	63
ConstructionSkills	14	19	39	53	53	60
SummitSkills	12	20	41	54	56	71
Automotive Skills	19	13	47	52	53	77
Skillsmart Retail	20	22	35	56	57	68
People 1st	18	19	37	53	48	64
Goskills	22	16	38	52	45	63
Skills for Logistics	18	15	39	51	51	59
Financial Services	41	27	15	87	76	75
Asset Skills	27	25	25	73	58	65
e-skills UK	24	17	30	67	58	63
Government Skills	63	34	0	100	92	87
Skills for Justice	66	29	2	100	92	80
Lifelong Learning UK	52	20	11	81	77	82
Skills for Health	40	26	15	84	81	83
Skills for Care and Development	52	27	8	90	84	79
Skillset	18	11	39	47	47	57
Creative and Cultural	22	14	28	61	47	60
SkillsActive	33	12	27	62	57	65
Non-SSC employers	29	21	25	66	59	64
Total	24	20	32	60	56	66

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