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# South London Partnership annex to the London Local Skills Improvement Plan

developed with



and the business and stakeholders of South London

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South London Partnership LSIP Annex

# Contents

<b>1</b>	<b>Employment and skills in South London Partnership area</b>	<b>5</b>
1.1	Priority Sectors	5
1.2	Employers	8
1.2.1	<i>Recruitment and hard to fill vacancies</i>	8
1.2.2	<i>Skills Shortages</i>	8
1.2.3	<i>Skills gaps</i>	9
1.2.4	<i>Future skills needs</i>	9
1.2.5	<i>Training provision in SLP</i>	10
1.2.6	<i>Adult Education Budget provision (AEB)</i>	10
1.2.7	<i>Higher Education provision</i>	11
1.2.8	<i>Training needs in SLP</i>	11
1.2.9	<i>Priorities: Engaging Employers and Improving Pathways</i>	13
<b>2</b>	<b>Cross-cutting themes</b>	<b>14</b>
2.1	Green skills	14
2.2	Digital skills (Technology)	15
2.3	Transferable skills	15
2.3.1	<i>Functional skills</i>	15
2.3.2	<i>Employability skills</i>	15
2.3.3	<i>Work readiness</i>	16
2.4	Inclusion	16
2.4.1	<i>Health, mental-health and disability</i>	16
2.4.2	<i>The international workforce in South London</i>	17
2.4.3	<i>Entrepreneurialism and Innovation</i>	17
2.5	Priorities: Cross cutting themes	18
<b>3</b>	<b>Health and social care</b>	<b>19</b>
	Key statistics	19
	<i>Skills issues</i>	20
<b>4</b>	<b>Construction and the built environment</b>	<b>21</b>
	Key statistics	21
	<i>Skills issues</i>	22
<b>5</b>	<b>Information and communication</b>	<b>24</b>
	Key statistics	24
	<i>Skills issues</i>	25
<b>6</b>	<b>Hospitality and retail</b>	<b>26</b>
	Key statistics	26
	<i>Skills Issues</i>	27
<b>7</b>	<b>Education</b>	<b>28</b>
	Key statistics	28
	<i>Skills issues</i>	29
<b>8</b>	<b>Part 3: Delivering the LSIP</b>	<b>30</b>
<b>9</b>	<b>Supporting Documentation</b>	<b>32</b>
10	Annex A: LSIP Actionable Priorities	33
11	Acknowledgements	40
12	Annex B: Project Methodology	41
13	Annex C: Technical Annex	45

# Part 1: The LSIP Purpose

## Executive Summary

The Local Skills Improvement Plan for London has been led by BusinessLDN who have been funded to deliver the formation of the pan London plan. South London Partnership is one of the four sub-regional partnerships that covers London, each tasked with developing an annex to the LSIP that covers our local challenges and recommendations. The South London Partnership (SLP) is a sub-regional collaboration of five London boroughs: Croydon, Royal Borough of Kingston upon Thames, Merton, Richmond upon Thames, and Sutton. SLP champions the strengths of the South London Partnership area as a place for people to live, work and thrive.

The South London annex of the London [Local Skills Improvement Plan](#) has been developed and written with and on behalf of stakeholders by IES and South London Partnership. Where reference is made to 'South London Partnership' (SLP) within the content of this annex it is to the businesses, employers, and stakeholders within the boundaries of the sub regional partnership.

Using qualitative analysis from a range of data sets, and through engagement and consultation with employers and stakeholders, we have developed a document which sets out skills challenges and employment challenges in priority sectors which either have an over representation of jobs and/or are of strategic priority for stakeholders in the South London Partnership area and the South London Partnership. Equally at a time of workforce capacity challenges in all sectors, this annex not only focuses on identifying priority skills and skills gaps, but also emphasises the importance of supporting the upskilling and reskilling of existing employees through training and development opportunities across SLP. The priority sectors identified for the South London Partnership area include:

- Construction and the Built Environment,
- Health and Social Care,
- Information and Communication,
- Hospitality and Retail, and
- Education.

Additionally, the sub region acknowledges the importance of creative industries with just over 3,300 jobs. Following research conducted by the SLP in 2022<sup>1</sup>, there is a high volume of micro-businesses and self-employment. With good access to skills support locally, equipping students with entrepreneurial skills is vital. This is captured in the cross-cutting themes.

The research has also identified clear cross cutting themes that impact all sectors such as green skills, digital, inclusion, transferable skills (work readiness) and entrepreneurialism which accompany recommendations for specific priority activity.

In shaping this annex, businesses, employers, and key stakeholders have universally welcomed the opportunity to develop a more tailored and localised approach to skills. The challenge in ensuring that the skills employers require are matched by those possessed by the workforce within the SLP area is a constant one. By developing a more strategic approach, this annex builds

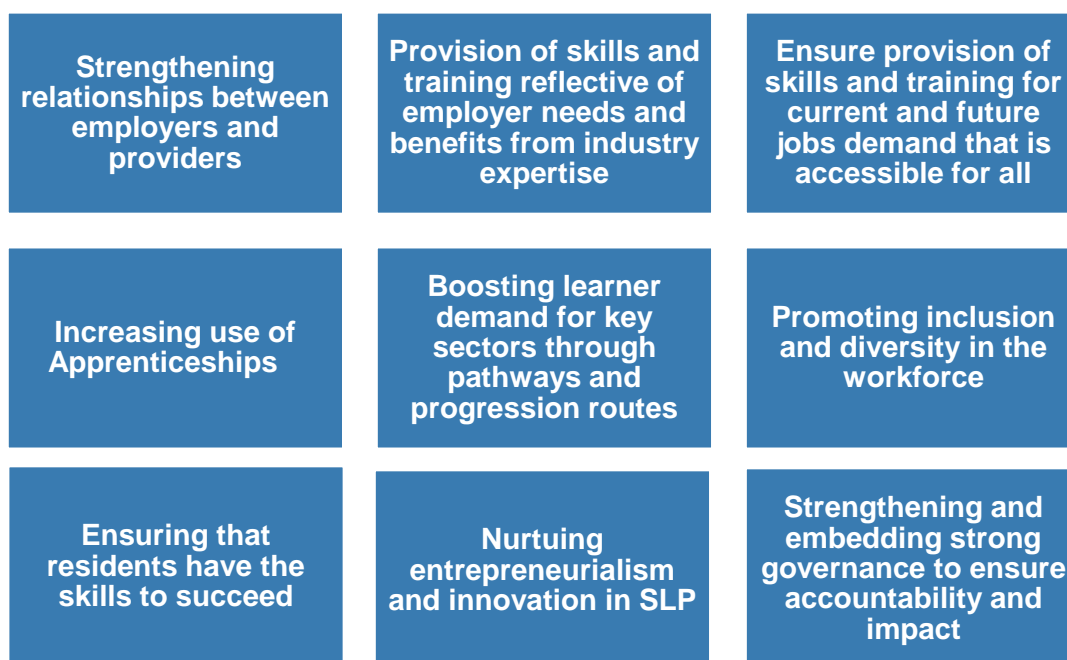
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<sup>1</sup> <https://big-knowledge.co.uk/news/new-report-south-london-cluster-analysis/>

on many of the issues identified with the wider London LSIP, but also responds to the specific challenges and opportunities for the existing and future workforce within the SLP sub region.

Whilst this annex identifies a series of recommendations that partners will coalesce around, much has already been done or is already planned to support local skills provision. Examples include the development of Green Skills training and pathways by the Mayors Green Skills Academy, engagement of employers and promoting sectoral opportunities via the South London Careers Hub, boosting capacity in the Health and Care Sector through the Mayors Health Hub and Mayors Care Hub, as well as targeting inclusion via the NWD Door South London Integration Hub and the Work and Health Programme. Educational institutions and business are also collaborating on *BIG*, an SLP supported programme which stands for Business Innovation & Growth, South London, attempting to boost investment in innovation and growth in South London

The LSIP defines clear actionable priorities for implementation over the next three years which will inform the new South London Skills Strategy and governance for the next 3 years. Our priorities include:



What we have heard time and again is that whilst this work will set out a clear way forward, it will be crucial that the momentum gained in the recent discussions continues over the longer term and that the programme can evolve and flex over the coming years to meet emerging skills and workforce challenges. The importance of continuing the skills conversation with all partners will be crucial to this. The South London Partnership itself looks forward to continuing to facilitate opportunities for all partners to shape the skills priorities for our local workforce and, provide a conduit between employers and training providers to take forward the actionable priorities within this annex, over the next three years.

The following report identifies sectors which are either of importance due to their overrepresentation of jobs in the SLP area or are of strategic importance to the growth of the local economy. We explore current occupation and skill demands through analysis of data and from consultations with key stakeholders. It is from these findings that we have developed the actionable priorities which will insure we develop a local talent pool, equipped with the skills to harness local opportunities, and strengthen the economy in south London.

# Part 1. LSIP Priorities

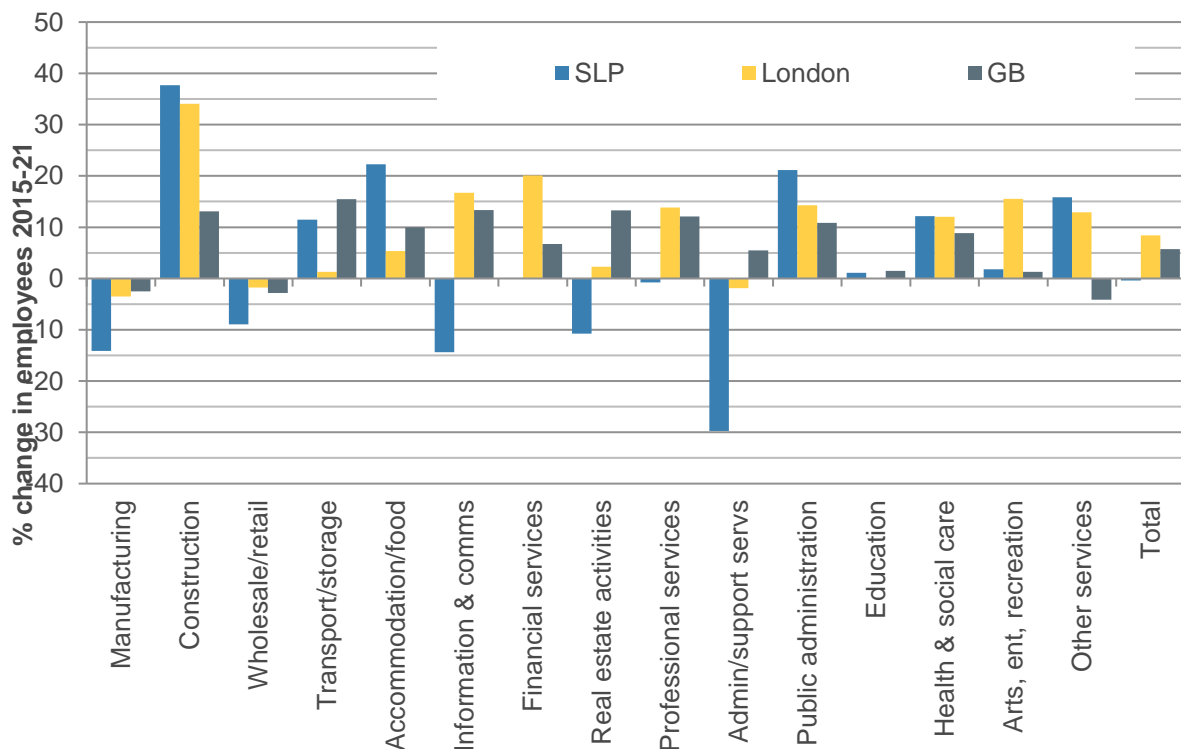
## 1 Employment and skills in South London Partnership area

### 1.1 Priority Sectors

Analysis of the Business Register and Employment Survey (2021) shows that between 2015 and 2021, the total number of employees in employment in SLP decreased by 0.4 % compared with increases in employment in Great Britain (5.7%) and London (8.4%) over the same period.

- This is due to a larger fall in the wholesale and retail sector in SLP than across London, with the sector being over-represented in SLP and thus having a greater impact on the overall employment level. There has also been decreases in employment in many service sectors such as information and communication, financial services, and professional services whereas these sectors have grown across London as a whole.
- The main growth sectors in SLP were construction, food, and public administration (central/ local government and other public sector bodies with large falls in employment in administrative and support services, information and communication, real estate activities, and manufacturing.

Figure 1.1 Change in employees in employment by sector, SLP, London and GB, 2015-21



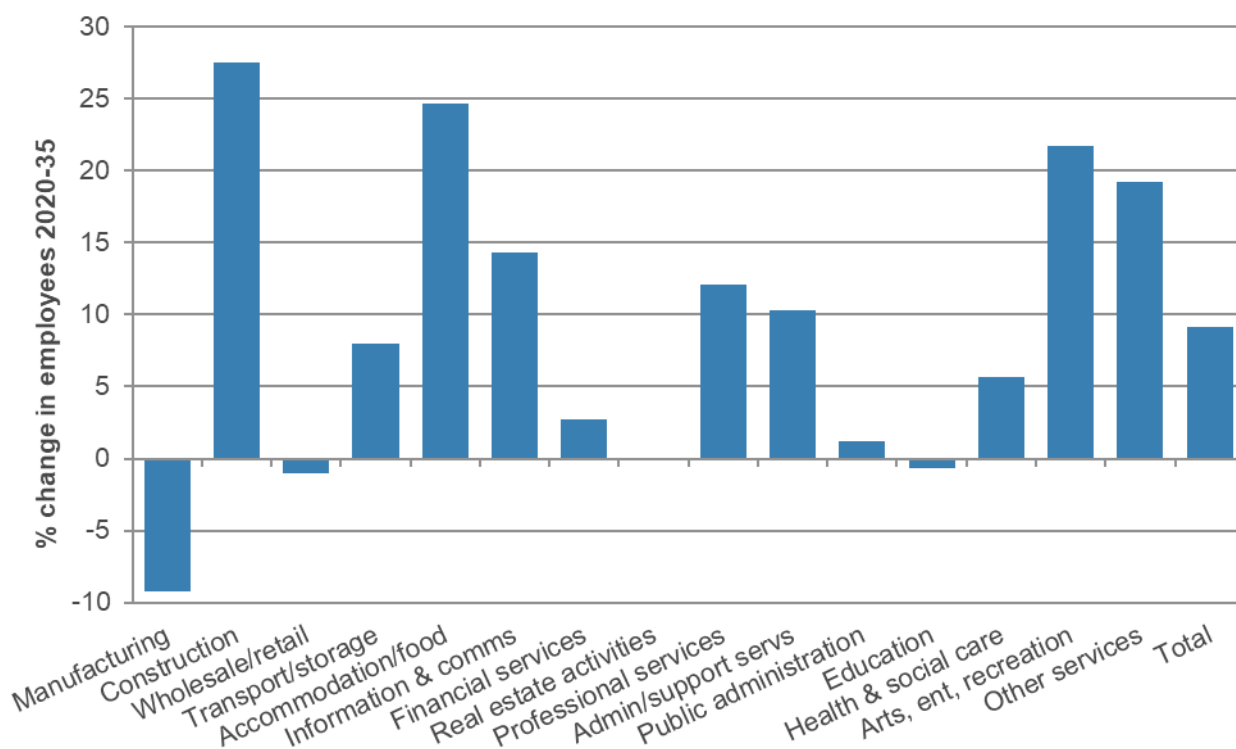
Source: Business Register and Employment Survey, 2021

Through the research five priority sectors for the South London Partnership area have been identified, based on their total employment size across the area and in individual Boroughs, their relative employment size compared with national employment, their strategic importance in terms of boosting growth and productivity, and the Mayoral priority sectors. These sectors have been explored in-depth through the data analysis and the consultations, and the sector-specific findings are presented later in the report.

<b>SLP priority sectors</b>	
<b>Health and Social Care</b>	This sector is large in employment terms, and accounts for a higher proportion of employment in SLP in comparison with London and Great Britain, plus it is a Mayoral priority sector
<b>Construction and the Built Environment</b>	Combining construction with the architectural and engineering activities sub-sector within professional services, this sector is over-represented in SLP and is a Mayoral priority sector
<b>Information and Communication</b>	Larger in SLP than nationally (although below the London average), it is likely to be a potential growth area over the coming years, and is another Mayoral priority
<b>Hospitality and Retail</b>	Large in absolute and relative terms, and hospitality is a Mayoral priority
<b>Education</b>	Accounts for a much higher proportion of employment in SLP than in London or nationally, and key for addressing skills challenges and contributing to lifelong learning

Employment projections by sector and occupation have been produced for the London region by the Institute for Employment Research (IER) as part of their Skills Imperative 2035 programme. These show that between 2020 and 2035, total employment across all sectors is projected to increase by 9.2 %. Employment in manufacturing is projected to fall by 9%, and there are small projected falls in employment in wholesale and retail, and in education. The largest projected increases are for construction (27%), accommodation and food (25%), and arts, entertainment, and recreation (22%).

**Figure 1.2 Projected employment change by sector, 2020-35**



Source: IER employment projections, 2020-35

There are markedly different forecasts for the SLP priority sectors in London drawn from the Business Register and Employment Survey (2021). **The construction and built environment sector is projected to experience rapid growth, with employment increasing by 20% between 2020 and 2035, more than twice as fast as employment in London overall. The information and communications sector is also projected to experience above average employment increase of 14%.**

Feedback from consultations supported these choices of priority sectors. However, it is important to note that supporting employment and economic growth in South London requires continuing to look beyond the key sectors outlined in this report. Stakeholders highlighted the importance of the **creative sector in South London**. The creative cluster, incorporating arts, publishing, production, advertising, and market research, is an area of strength for South London. This sector is projected to grow at both a national and local level, with a projected estimate of 8,800 jobs in the sector in South London by 2030, supported by key strategic investment sites in the area (Croydon Creative Enterprise Zone and Twickenham studios). However, despite the strength of the sector creative arts is still facing skills gaps and shortages, with a projected loss of 950 jobs by 2030 without changes to the local skills system, indicating that cross-cutting recommendations presented in this report (chapter 4) should be applied to the creative sector as well as the priority sectors. Creative arts employers tend to require technical expertise to fill highly skilled roles. High levels of self-employment and microbusiness in the sector creates challenges with engagement with the local skills system, this is explored in more depth in section 4.5 covering microbusiness.

## 1.2 Employers

Following analysis of the Survation Survey, London Business 1000 Survey and 2019 Employer Skills Survey, businesses in the SLP area reported four key areas of challenge:

### 1.2.1 Recruitment and hard to fill vacancies

- Three quarters (74%) of employers in SLP said that they had current vacancies (Survation survey (2022)) with 58% of those stating that they were struggling to fill them compared with 65 % across London.
- 57% of SLP respondents who reported that they were struggling to fill some of their vacancies said that a low number of suitable applicants with the required skills was the biggest driver of recruitment difficulties (Survation (2022)), which also matched the proportion for all respondents (57%).
- SLP businesses were more likely than those elsewhere in London to report that there were no skills or labour market challenges for their business (14.4% compared with 10.3% across London). (London Business 1000 survey (2022))

### 1.2.2 Skills Shortages

- 77% of establishments that reported hard-to-fill vacancies in SLP said that they had skills shortage vacancies (i.e., they were difficult to fill due to a lack of skills, qualifications, or experience among applicants) (Employer Skills Survey (2019))
- SLP businesses were more likely to report skills shortage vacancies for the following groups:
  - Caring, leisure and other services staff (21.8% compared with 13.7% for London);
  - Sales and customer service occupations (11.5% compared with 8.6%); and
  - Skilled trades occupations (19.8% compared with 17.8%) (Employer Skills Survey (2019)).

In terms of the skills that establishments found lacking among applicants, the ESS (2019) separates these out into technical and practical skills, and soft/people skills. SLP establishments were more likely than those elsewhere in London to report the following skills as being difficult to obtain from applicants:

- Computer literacy/basic IT skills (31.7% compared with 20.6% across London)
- Advanced or specialist IT skills (23.1% compared with 19.2%); and
- Manual dexterity e.g., to mend, repair, assemble, construct, or adjust things (24.3% compared with 22.3%).

There were several soft/people skills that SLP establishments were more likely to cite as difficult to obtain:

- Sales skills (30.6% compared with 28.2% for London); and



- Managing own feelings or handling the feelings of others (39.6% compared with 37.0%).

### 1.2.3 Skills gaps

The Survation survey (2022) asked respondents whether their existing workforce had the skills and capabilities to meet the business' needs, or whether there were gaps in skills and capacity. Respondents in SLP were broadly just as likely to report skills gaps than those elsewhere in London, with 30% reporting some gaps in skills and capacity, and 4% reporting significant gaps in skills and capacity, compared with the proportions across all respondents of 31% and 3% respectively. SLP respondents with skills gaps were less likely than those elsewhere in London to report that English skills (reading and writing) were lacking (16% reported English skills compared with 21% across London) but were more likely to report that basic maths skills were lacking (32% compared with 23% across London).

SLP respondents were more likely than average to report skills challenges for skilled manual/technical roles (36% of respondents compared with 32% across London) but less likely to report challenges for professional/managerial roles (28% compared with 37% across London) (London Business 1000 survey (2022)). The survey went on to ask which types of skills respondents were facing challenges with. SLP respondents were more likely than average to report challenges with basic IT skills (10.4% compared with 8.6% across London), and foreign language skills (7.7% compared with 7.0%).

The ESS (2019) found that 10.9 % of establishments in SLP reported skills gaps among their existing staff, the same as the proportion for the whole of London. SLP establishments were more likely to report gaps among caring, leisure and other services (12.4% compared with 7.4% across London) and among machine operatives (6.6% compared with 4.6%), although the occupations mostly commonly reported as having skills gaps were sales and customer service occupations (31.3% compared with 26.2% across London) and administrative/clerical occupations (23.2% compared with 27.6% across London). Across all establishments in SLP with skills gaps, the types of skills that were lacking were very similar to those across London as a whole. The areas where SLP establishments were more likely to report gaps were manual dexterity skills, reported as lacking by 17.1 % of SLP establishments with gaps compared with 14.1 % of establishments across London, reading and understanding instructions, guidelines, manuals, or reports (35.8% of SLP establishments with gaps compared with 32.3% across London).

### 1.2.4 Future skills needs

- SLP businesses were less likely than those elsewhere in London to be very confident they understood their future skills needs (33% compared with the London average of 40%) (Survation (2022)).
- Advanced digital and sector specific technical were the most mentioned skills needs as across London however SLP businesses were more likely to report needing green skills, basic digital skills, and basic maths skills (such as numerical or statistical skills and understanding) (Survation (2022)).

These findings were broadly reflected in stakeholder consultations. Stakeholders reported high levels of recruitment across sectors, with skills shortages and gaps in line with those outlined above. Consultations suggested that for employers who are recruiting for entry level roles, particularly in health and social care, and retail and hospitality, labour shortages were more of an

issue than skills gaps. These employers discussed their main recruitment issue being a lack of applications due to **high competition for workers to fill entry level roles in the region**.

This was often compounded by **low pay and a prevalence of insecure work** (such a zero hours and fixed term contracts), and a poor perception of these roles and industries among potential applicants. Given the context of the cost-of-living crisis and rising in work poverty employers may need to make these jobs more attractive to applicants and address labour shortages.

Stakeholders suggested that employers and training providers could work together to provide in work progression pathways to make these roles more appealing to applicants. There may also be a role for stakeholders to encourage these employers to improve the quality of work offered by paying a London Living Wage and offering secure contracts.

## 1.2.5 Training provision in SLP

## 1.2.6 Adult Education Budget provision (AEB)

Table 1.3 shows the AEB aims enrolments by subject area across the SLP area (GLA Adult Education Budget 2021-2022). The largest subject area is **preparation for life and work, which includes predominantly basic skills qualifications in English, mathematics and English for Speakers of Other Languages**, accounting for 45 per cent of all AEB provision, and more than half of adult skills provision (55%).

**Arts, media, and publishing** is the next largest subject area for adult skills provision, and is the largest subject area for community learning, accounting for 14 per cent of all provision, and 41 per cent of community learning, which may provide skills for the creative and design sub-sectors within information and communication. **Health, public services, and care is the third largest subject area, accounting for 10 per cent of total provision and 12 per cent of adult skills provision**, which will provide skills for the health and social care sector.

Provision related to the other SLP priority sectors accounts for a small proportion of the total. This indicates a discrepancy between skills provision available in the region, and the needs of local employers and the local economy. The relative lack of provision for construction skills (2.1% of enrolments in SLP 2021/22) is particularly striking given a project growth in construction demand of 27% by 2035 (see chapter 4), indicating that improving the provision of construction skills training is a key priority.

**Table 1 AEB aims enrolments by subject, SLP, 2021/22**

	Community learning	Adult skills	All AEB
Health, Public Services and Care	4.3	11.8	9.7
Science and Mathematics	0.6	1.6	1.3
Agriculture, Horticulture and Animal Care	0.6	0.5	0.6
Engineering and Manufacturing Technologies	0.0	1.7	1.2
Construction, Planning and the Built Environment	0.1	2.9	2.1
Information and Communication Technology (ICT)	4.6	7.2	6.5
Retail and Commercial Enterprise	2.4	3.9	3.5
Leisure, Travel and Tourism	5.8	0.9	2.2
Arts, Media and Publishing	41.0	4.2	14.2
History, Philosophy and Theology	3.9	0.1	1.1

Social Sciences	0.6	0.1	0.2
Languages, Literature and Culture	18.1	2.1	6.4
Education and Training	0.1	2.3	1.7
Preparation for Life and Work	16.8	55.4	44.8
Business, Administration, Finance and Law	1.2	5.6	4.4
Total aims enrolments	13,960	37,270	51,240

Source: GLA, *Adult Education Budget, August 2021-July 2022*

## 1.2.7 Higher Education provision

**The largest subject areas in the SLP area are subjects allied to medicine (19%), business and management (15%) and design, and creative and performing arts (14%), with subjects allied to medicine and design and creative studies being over-represented in comparison with provision across London.** Including St George's and Roehampton boosts provision in medicine and allied subjects to 27 per cent of total provision compared with 15 per cent across London (HESA (2022)).

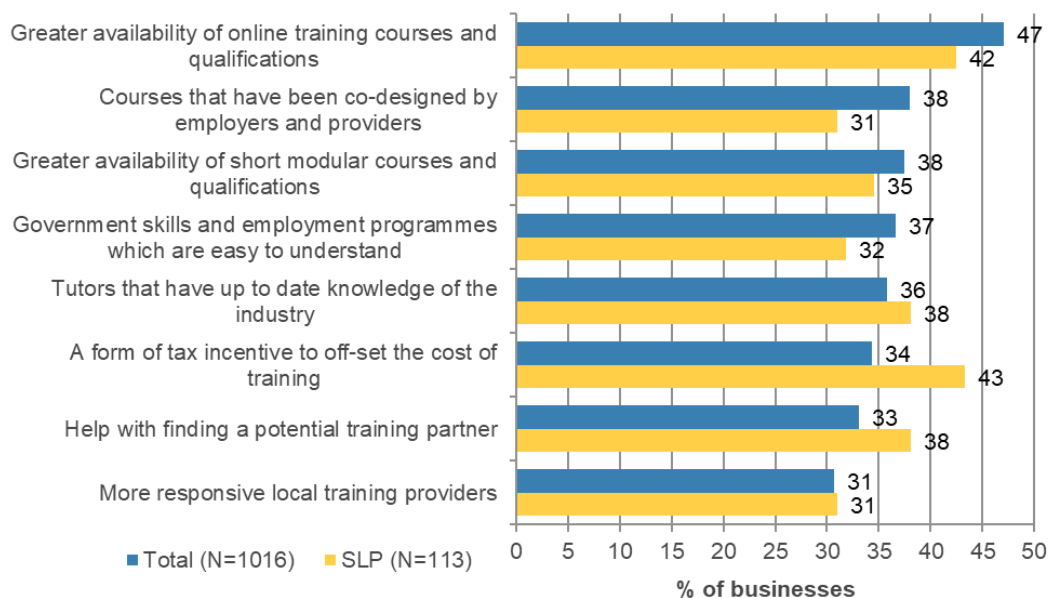
## 1.2.8 Training needs in SLP

According to the Survation Survey (2022) SLP businesses were slightly **less likely to have engaged with independent training providers and universities**. They were also slightly less likely to be delivering T-levels. SLP businesses were slightly **more likely to report engaging with no educational institutions compared to all London businesses** (27% compared to 21%). Hospitality businesses were much more likely to have engaged with Jobcentre Plus or other employment service providers (50%) but much less likely to have engaged with other provision, while businesses in the transport and logistics, and manufacturing sectors were more likely than average to have engaged with independent training providers (46% and 39% respectively).

**SLP businesses were more likely than average to report the cost of training, or time available in the business as barriers to engaging with training for their staff**, 56% of SLP businesses mentioned the cost of training as a barrier, compared with 47% of businesses across London. Elsewhere, SLP business faced barriers that were broadly similar for businesses across London; for example, 43% of SLP businesses mentioned time available in the business as a barrier, compared with 42% of all businesses.

**Cost of training was a particular barriers for health and social care, as well as education organisations** across London (mentioned by 90% and 63% respectively), while information and communication businesses were much more likely than average to report the **relevance or quality of local training courses as a barrier** (61% compared with 41% of businesses across all sectors) as well as knowing where to find the right training (44% compared with 34% of businesses across all sectors). **SLP businesses were slightly less likely than businesses across London to be planning on increasing their investment in training over the coming year**, with 24% of SLP businesses saying it would increase significantly, compared with 29% of businesses across London, and 35% saying it will increase somewhat, compared with 40% across London. Information and communication businesses were much more likely than average to be planning to increase their investment in training (40% planned to increase it significantly and 44% planned to increase it somewhat).

Figure 1.4 Measures that would help businesses improve workers' skills, SLP and London, 2022



Source: *Survation survey, December 2022*

**SLP businesses were more likely than those across the whole of London to report that tax incentives to offset the cost of training and help with finding a potential training partner would help them the most** with 31 % wanting courses that have been co-designed by employers and providers. Health and social care as well as information and communication businesses were more likely to report greater availability of online training courses and qualifications would help improve worker's skills than across London as a whole (65% and 49% respectively).

The London Business 1000 Survey (2022) found that **7.3 % of SLP employers employed Apprentices, around half the proportion across the whole of London of 13.6 %** with education, health, and construction sectors most likely to employ apprentices.

SLP employers were also less likely than average to be required to pay the apprenticeship levy (8.5% compared with 13.9% for London), and employers in hospitality and retail, and in information and communication, were less likely than average to have to pay the levy or to intend to use funding over the next 12 months (London Business 1000 Survey (2022)).

SLP establishments were as likely to provide off-the-job training for their staff as establishments across the whole of London and **those that had provided external training were less likely than average to have used FE colleges** (9.7% compared with 15.0% across London) or universities/HE providers (11.5% compared with 14.4%), but more likely than average to use their suppliers (34.5% compared with 26.7%) (ESS (2019)).

**Consultations with stakeholders suggested that both employers and training providers in SLP are keen to work together to design and provide courses that benefit learners and the**

**local economy.** Stakeholders provided some successful examples of co-design of courses and employer led training in South London, especially in health and social care and construction, with the Sector Based Work Academy model proving particularly effective.

However, **providers and employers face barriers to engaging with one another that the LSIP is well placed to address.** Employers discussed finding it **hard to navigate the skills sector** in South London, particularly apprenticeships, and in some cases found providers to be unresponsive. Businesses, especially SMEs, also faced issues with a lack of resources and time to engage with training providers and to release staff to attend training. Furthermore, stakeholders reported that provision of training in priority sectors did not always translate to employment in the sector.

This reflected the experience of providers, who were keen to work with employers but **sometimes found that employers were hard to reach and did not engage with training**, even where bespoke courses had been provided. Stakeholders suggested that these issues could be addressed through providing courses that fit employers needs in terms of time, resources, and outcomes. There is also strong demand for dedicated roles and resources to help employers to engage with and navigate the skills systems.

### 1.2.9 Priorities: Engaging Employers and Improving Pathways

Priority	Challenges	Actionable Priority
<b>Strengthening relationships between employers and providers</b>	<p>Providers keen to collaborate but employers can be harder to engage, employers find it hard to navigate the skills system</p> <p>Lack of employment opportunities following completion of training</p> <p>Addressing the lack of teachers and tutors in growth sectors with specific technical skillsets</p>	<p>Funded roles to lead co-ordination between employers and providers e.g., exploring a South London skills brokerage system to complete training needs analysis of organisations, identification of jobs, and signpost them to the right educational provider.</p> <p>Explore development of digital learning platforms, information-sharing and marketing activities to promote higher levels of awareness and engagement of skills provision.</p> <p>Explore collaborative recruitment campaign for tutors and trainers, targeted at employers, for all educational institutions, to encourage more people into the education sector, specifically into vocation and technical teaching and basic skills (English, maths, and digital skills).</p>
<b>Ensure provision of skills and training for current and future jobs demand</b>	<p>Struggling to recruit to hard to fill vacancies</p> <p>Lack of work experience</p>	<p>Work with the SLP Careers Hub to develop a strategic approach to work experience and T Level placements to contribute to employability levels and improve work-readiness levels among young entrants to the job market.</p>
<b>Boosting learner demand for key sectors</b>	<p>Lack of applicants for entry level roles or sector</p>	<p>Working with employers and linking them to existing assets such as the Careers Hubs, Mayors Academy Hubs, employment support programmes and job brokerage services to raise the profile of careers and pathways of sectors with high job vacancy shortages</p>
<b>Increasing use of Apprenticeships</b>	<p>Use of apprenticeship levy and good practice to transfer unused levy</p> <p>Apprenticeships utilised for reskilling existing</p>	<p>Improving employer awareness and access to support through the apprenticeship levy and working with organisations, such as the London Progression Collaboration, to make it easier for businesses to engage with apprenticeships.</p>

	staff rather than those new to sector or new to workforce e.g. 16-18 year olds	<p>Boost the number of 16-18 choosing apprenticeships through more employer and training provider engagement with schools across south London</p> <p>To develop/promote better stepping stone or bridging qualification through business administration to support new entrants into the sector, filling the gap left by the removal of the L2 business administration apprentices</p>
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## Part 2: Priorities for Action

### 2 Cross-cutting themes

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Consultations with stakeholders identified several cross-cutting issues affecting recruitment and retention across all priority sectors as well as other key sectors in South London such as creative arts. Addressing skills gaps and shortages in the area requires both a sector specific focus and action to address these cross-cutting issues.

#### 2.1 Green skills

In a report commissioned by London sub-regional partnerships in 2021<sup>2</sup>, it was identified that there were 19,200 in the green economy in 2020, 4.2% of total employments. **Power and Homes and Buildings** were found to be the most prominent green sectors in South London, accounting for 3 out of 4 green jobs. In a central growth scenario, it saw green jobs to increase by 7% to 2030, or an additional 38,000 jobs.

Consultations suggested that government policies to support the transition to net zero emissions over the coming decades will create huge demand for green skills in South London. Stakeholders anticipated that over the coming years and decades sustainability and creating a green economy will create major changes to the local economy as employers across sectors work towards a UK wide net zero emissions target. Primarily green skills will be needed in the construction sector – namely **retrofit, enveloping trades, electricians, and public infrastructure workers**. This is supported by a report commissioned by SLP, looking at the construction occupation demand. It identified the need of 55,000 person years to fulfil retrofit requirements on domestic and non-domestic buildings across SLP. This will have a significant impact on the construction sector.

Throughout the development of the SLP annex, we have considered the impact of emerging skills needs and occupations that directly impact net zero ambitions and those jobs and skills that support broader environmental goals. This can be seen most prominently in the construction

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<sup>2</sup> <http://southlondonpartnership.co.uk/economy/green-jobs-and-skills-report-phase-1-and-2/#:~:text=The%20research%20predicts%20that%20there,such%20as%20plumbers%20and%20electricians.>

sector, where there is a need for both upskills of the existing workforce. Work has already commenced to start mapping pathways into green jobs through the Mayor's Academy Hub with the [Green Careers Tree](#) and [skills and job website](#)

It was less clear which green skills would be needed in other sectors although stakeholders anticipate that the move towards a green economy will affect all sectors. At present sustainability managers are the main non-construction role requiring green skills, but local training providers will need to be agile to address demand for new skills over the next few years.

## 2.2 Digital skills (Technology)

While high level digital skills are mainly required in the IT and communications sector, a lack of basic IT skills was identified as a key skills issue across all priority sectors in South London. Employers reported both skills gaps and shortages for basic IT skills such as using Microsoft Office, email, and basic IT competencies needed to learn how to operate internal software. While employers can provide some technical support, they need applicants with existing core IT skills to perform their roles. However, AI and automation were also identified as new technologies that are projected to create new skills needs over the coming years and decades. It is anticipated that the development of AI could create a skills shift, with some jobs being automated by AI. This will both create **demand for new skills around managing AI and a potential need to reskill workers who have been displaced by automation**. At present stakeholders were unsure how these new technologies will impact work in priority sectors and providers struggle to identify future skills needs and provide training in emerging technologies, creating a delay between skills needs and the ability to provide training around these needs, particularly with the **lack of tutors** in this area.

## 2.3 Transferable skills

Employers across the priority sectors highlighted core, transferable skills as the main skills shortage that they were facing. Most employers said that they are willing to provide training and development in role specific skills, if applicants have the core skills required by employers in any sector. The main sets of core skills required were functional skills, employability skills and work competencies.

### 2.3.1 Functional skills

Employers in all priority sectors require a **good level of written and spoken English language skills** to fulfil roles that involve customer service, teamworking and interpersonal communication. Currently there are some gaps around this due to the large international workforce in South London, which is explored more fully below in the section around inclusion. Numeracy skills are also important across all sectors and relate to several basic functions such as cash handling, as well as sector specific skills such as administering medication in health and social care. There is already good provision of these skills in South London, both through training providers and the Multiply scheme.

### 2.3.2 Employability skills

A major issue for employers looking to fill entry level roles across all priority sectors is a **lack of core employability skills among applicants**. Some employers reported a lack of skills around

CV writing and interview skills as a major barrier to filling vacancies. While employers in health and social care have taken steps to address this by using more accessible means of recruitment, stakeholders felt that there needed to be increased provision of employability skills training in the area. Employability training is available in South London through Job Centre Plus and several employability programmes delivered by local government and support organisations, stakeholders felt that employability skills need to be embedded in the curriculum to tackle these issues before people enter the labour market.

### 2.3.3 Work readiness

Moreover, while skills needs differ across sectors, stakeholders reported a major skills gap for core workplace competencies such as expected behaviours around dress, punctuality, communication and work ethic. **A lack of key 'soft' skills such as resilience, independent thinking, problem solving, analytical skills and ability to handle emotions also affected recruitment and retention of staff. This also included communication skills, which employers differentiated from functional English language skills.** Currently there is a lack of funding and provision to provide people with these key skills, and stakeholders saw a need to embed this into the core curriculum. Consultations also suggested that the most effective way for people to learn these skills is through gaining employment experience, which can be supported by greater provision of work experience and on the job training within local skills provision. This requires providers working with local businesses to develop a pipeline of work experience for people of all ages, including both short term placements and longer paid internships. In the short term, employers may look to re-engage those with the skills they require who are currently outside the labour market, such as recent retirees and the economically inactive, but in the longer term there is a need to increase the work-readiness of new entrants to the labour market.

## 2.4 Inclusion

The main themes around inclusion in work in South London that arose from consultations were around health and disability, and the migrant workforce in the area. **We also acknowledge that there are disadvantaged south Londoners facing significant and complex barriers to accessing and receiving skills training and moving into good work.** We have several programmes that are working to mitigate and overcome some of these challenges, such as the No Wrong Door Integration Hub, the Work and Health Programme and championing the Mayor's Workforce Integration Network however, further efforts will be required to embed equity and belonging into the practices of our stakeholders, starting with the promotion of and access to skills provision to attract learners for a wider network and with employers on the adaptation of recruitment practices.

### 2.4.1 Health, mental-health, and disability

Ill health and disability were raised as barriers to the labour market for workers in South London which employers felt ill equipped to deal with. **Some employers were not confident in supporting those with SEND or a disability at work.** Priorities should give due consideration to those who are economically inactive due to health needs or disabilities.

**Mental health arose as a key issue** around health and disability facing employers. **Employers reported that mental health is a widespread issue among the workforce** across sectors affecting both new and existing employees. This issue has been exacerbated following the pandemic, with many employers reporting that their employees present mental health needs such



as depression and anxiety. **Supporting these employees requires excellent management skills and an understanding of local mental health systems.** This creates new skills for managers around supporting staff, such as having supportive conversations, building relationships, and using wellbeing action plans. However, at present many employers do not feel well equipped to deal with these needs and expressed a need for more training around mental health awareness and support.

## 2.4.2 The international workforce in South London

South London is a diverse area which has seen recent migration from Hong Kong, Ukraine, and Afghanistan. This is expected to increase in the coming months and years, especially related to family reunification for refugees. **A significant proportion of the workforce in South London therefore speaks English as a second language**, particularly in entry level health and social care roles. This creates a skills need for sector specific ESOL (ESOL for jobs), as well as cultural knowledge of the UK. Finally, the international work force brings issues of qualification conversion, with skilled workers being unable to work in their sector and role due to having international qualifications.

## 2.4.3 Entrepreneurialism and Innovation

The final cross-cutting theme for South London is skills needs relating to microbusinesses (employers with between zero and nine employees). There is an overrepresentation of microbusinesses in South London, with **microbusinesses accounting for over 90% of employers in South London**. Sutton has a higher proportion of SMEs and microbusiness compared to London as a whole. Microbusinesses are present across the priority sectors, as well as South London's thriving creative arts sector. This presents a need for skills training around owning and managing a small business such as creating a business plan, marketing, and finances.

Consultations suggested several ways of addressing these cross-cutting issues, which will help to address skills shortages and gaps across the priority sectors and the local economy more generally. This includes embedding transferable skills training into the curriculum, providing sector specific training for ESOL and functional skills, providing training to support employers to hire people living with a disability, and building on the existing green skills offer in South London.

BIG, which stands for Business Innovation & Growth, South London, is attempting to boost investment in innovation and drive growth in South London. It is looking to address one of the key innovation challenges that South London is facing in terms of low productivity – South London is the least productive part of London, with GVA per hour worked 42% higher in Inner London – and helping local businesses and organisations boost both their capacity and competitiveness.

Over the last three years the programme has engaged with over 500 South London businesses and organisations, motivating them to invest in innovation (including structured R&D activities with the South London knowledge base) and to consider barriers to the growth of their businesses. Undoubtedly one of the most often cited barriers is the challenges they face in recruiting staff with the relevant skills and experiences to identify, implement and evaluate innovation within the workplace – in particular the capacity for creativity and adaptability, and analytical, problem solving and technical skills. These views being echoed in the findings of the recent 'Future Skills Report (2022)' published by our partner Kingston University. Through this extensive engagement with South London businesses and stakeholders, there is a direct relationship between increased levels of technical and organisational innovation and the demand for higher levels of education, training and skills. For South London businesses and employers to continue to be successful in

the future, investment in skills to support the delivery of innovation will unlock the significant potential of investment in innovation, research, and development.

## 2.5 Priorities: Cross cutting themes

Priority	Challenge	Actionable Priority
<b>Build awareness and knowledge of Green Skills roles and pathways</b>	Lack of awareness of green skills and increasing demand for green skills in all sectors	Use the Green Skills Academy Hub to develop a collective brand and shared communication strategy to raise awareness and improve knowledge of the green skills, jobs, and careers across South London  Improve access to/provide more L1-L5, including modular and short qualification, supporting green industries – specifically courses such as retrofit, project management, envelope trades and installation of green technology
<b>Improving provision of Digital Skills (Technology)</b>	Lack of basic IT skills across sectors.  Unknown impact of AI and lack of tutors to teach the unknown needs	Improving basics skills for IT, specific to a sector and relevant to the technology used – this could be embedded and/or stand alone – across all priority sectors  Explore commissioning research to understand impacts of AI and automation on the jobs across south London and develop a plan to mitigate impacts on south Londoners job opportunities through skills development
<b>Entrepreneurialism</b>	Majority of SME and micro businesses in the SLP area  High proportion of micro/SMEs in creative which is a growth area	Entrepreneurial skills to be embedded across the curriculum for all educational institutions.
<b>Transferable Skills</b>	Data highlighted transferable skills as most prevalent skills in demand in multiple sectors	Core skills e.g., teamwork, communication, punctuality and expected work behaviours to be embedded across all skills and training programmes as standard and explore a South London Employment standard that focuses on core employment skills and behaviours including resilience, problem solving and mindset.
<b>Promoting inclusion and diversity in the workforce</b>	Residents experiencing significant barriers to employment  Employers with varying levels of confidence in supporting the needs of residents with additional barriers	Support employers to develop a more inclusive workforce through training and knowledge building to drive inclusive recruitment and retention practices. Including training and tools for employers/businesses and their managers to support employees with disabilities, mental health conditions, SEND and neurodivergence, and long-term health conditions (including menopause).  Encourage training providers to promote and deliver training to groups where there is an under-representation in specific sectors e.g., women in construction.

## 3 Health and social care

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### Key statistics

The health and social care sector employed around 60,000 employees in the SLP area in 2021, accounting for 14.1 % of all employees. This is slightly above the national figure of 13.6 %, considerably above the London average of 10.6 % (Business Register and Employment Survey (2021)).

There was significant variation by Borough, with the sector accounting for nearly one fifth of all employees in Kingston upon Thames (19.4%) and Sutton (18.1%), while it accounted for just under 10 % of employees in Merton (9.5%) (Business Register and Employment Survey (2021)).

According to LFS (2022) data just over 40 % of workers in health and social care were in professional occupations, while caring, leisure and other service occupations are the next largest group, accounting for 29 % of all workers;

In terms of workforce demographics:

- Three quarters (74%) were female, compared with 48 % of all workers
- More than half (56%) were from ethnic minority backgrounds, mostly those from Asian and Black backgrounds, compared with around 39 % of all workers
- One in four workers (25%) were aged 55 and over, compared with 20 % across all sectors
- One in six workers (16%) had a disability, the same proportion as across all sectors; and
- Nearly two thirds (65%) had a degree or equivalent or higher qualification, above the proportion across all sectors of 55 %, while around one in ten (11%) had qualifications below GCSE level or no qualifications<sup>3</sup>, similar to the proportion across all sectors (13%) (LFS (2022)).

There is projected to be a 10% increase in employment in employment in the health sector across London according to the latest employment projections from the Institute for Employment Research (2021)<sup>4</sup>, but a decline in employment in social care of around 2%. However, the SLP Care Workforce Strategy<sup>5</sup> projects a large increase in employment in the care workforce in the SLP area, of around 30% or 10,000 workers to 2035. In terms of occupations, there is projected to be a 46% increase in employment in associate professional and technical occupations (medical and pharmaceutical technicians, welfare and housing officers) and an increase of 8% in caring occupations (nursing assistants, care assistants). However, the number of professional workers

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<sup>3</sup> Or did not know their qualification level.

<sup>4</sup> The Skills Imperative 2035

<sup>5</sup> [http://southlondonpartnership.co.uk/wp-content/uploads/2022/12/SWL-Social-Care-Workforce-Strategy\\_final.pdf](http://southlondonpartnership.co.uk/wp-content/uploads/2022/12/SWL-Social-Care-Workforce-Strategy_final.pdf)

(nurses, medical practitioners) is projected to fall by 2%, and there are larger projected falls for the other occupational groups.

Current and Projected demand for occupations	Skills in demand	Curriculum
Care workers and home workers Associate professional and technical occupations Medical and pharmaceutical technicians Nursing assistants Nurses Medical practitioners Care managers Occupational and speech and language therapists Cooks Social care frontline staff (social workers)	Computer literacy/basic IT skills Complex problem solving skills Managing or motivating other staff Communication skills Cultural awareness Business management skills Mentoring skills ESOL for health and care Higher level care/care managers	<i>We expect training Providers/educators to ensure that curriculum is developed to meet in demand occupations and skills identified in the LSIP. We expect these to be delivered through a range of programmes including 16-18 study programmes, T'levels, A'levels, apprenticeship, Adult Education Funded provision and community learning.</i>

## Skills issues

There were high levels of vacancies in both health, and social care, although different issues affecting the two. In health, there were skills shortages across all roles including administration and management as well as healthcare roles. In social care, the difficulties were more quantitative in nature, in terms of getting enough recruits in entry roles given very high turnover levels, and poor pay and conditions in relation to other competitor sectors such as retail.

International recruitment, and targeting foreign nationals in the UK, were used to address these labour shortages, but could create skills needs in relation to ESOL and cultural awareness. Social care employers also reported using values-based recruitment and training new entrants, rather than targeting those already qualified.

There were also skills gaps in the existing workforce, primarily related to IT, with use of digital technologies growing across the sector and older workers potentially lacking basic IT skills, but also related to business management skills in social care particularly.

Priority	Challenge	Actionable Priority
<b>Boosting the numbers of people in the health and social sector</b>	High levels of vacancies, turnover  Lack of entry level applicants due to pay and progression	See boosting learner demand for key sectors

<b>Increase skills &amp; training provision required by the Health and Care sector</b>	<p>Health and social care workforce analysis is limited within the scope of report</p> <p>Breadth of skills needs from entry level to highly skilled</p> <p>Diversity of workforce and proportion of those with ESOL</p>	<p>Conduct deeper analysis into health and social care gaps and linking with strategic health and social care workforce activity via SLP and the Integrated Care Board.</p> <p>Improve supply of short courses e.g. professional youth work qualifications, functional skills for health and care e.g., returning to work refreshers, L5 care management.</p> <p>Develop a programme of support for new entrants to the care sector, specifically front-line workers, to include relevant vocational training and career support and pathway progression.</p> <p>Business training for managers, to include developing skills on budgets and finance, marketing and recruitment and learning and development and coaching training for managers.</p> <p>Vocationally relevant ESOL, communication and cultural skills training, with a focus on supporting international recruitment and migrant workforce</p>
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## 4 Construction and the built environment

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### Key statistics

Just over 31,000 employees worked in the construction and built environment sector in the SLP area in 2021, accounting for 7.3 % of the total number of employees, above the regional and national averages (5.3% and 6.5% respectively) (Business Register and Employment Survey (2021)). Employment is highest in Croydon and Sutton at around 9%, and lowest in Kingston upon Thames and Richmond upon Thames (5.3% and 5.8% respectively; the figure for Merton is 6.7%) (Business Register and Employment Survey (2021)). Skilled trades occupations made up around one third of the total workforce (32%) and professional occupations accounted for nearly a quarter (23%), with managerial and associate professional/technical occupations each comprising 14 % of all workers (LFS (2022)).

In terms of workforce demographics:

- Three quarters (77%) were male, compared with 52 % of all workers
- One in four (25%) were from ethnic minority backgrounds, compared with around 39 % of all workers
- Nearly one in four workers (23%) were aged 55 and over, compared with 20 % across all sectors
- The proportion of workers with a disability was close to the proportion across all sectors (15% and 16% respectively); and
- Just over one third (36%) had a degree or equivalent or higher qualification, below the proportion across all sectors of 55 %, while nearly one in five (19%) had qualifications below GCSE level or no qualifications, above the proportion across all sectors (13%) (LFS (2022)).

There is an underrepresentation of women and those from ethnic minority backgrounds in the construction sector, contributing to the construction skills gap at both a local and national level. For the construction sector engaging underrepresented groups through careers advice, information and guidance and other forms of outreach is necessary to meet current and future skills needs.

In construction and the built environment across London, the construction sub-sectors are projected to grow rapidly to 2035, by 27%, while employment in architectural and engineering activities is projected to remain stable (IER (2021)). The SLP Cluster research forecasts for the sector were less positive however, suggesting a 7% decline in employment in south London to 2030, albeit using a broader definition of the sector which included real estate activities and manufacturing of construction materials. All occupational groups in the construction sub-sectors are projected to increase in size, with the fastest growth projected for professional occupations (58% increase), elementary occupations (40% increase) and associate professional/technical occupations (35% increase).

Government net zero targets are also creating high demand for green skills, particularly for building envelope specialists to support retrofiting. Research commissioned by London sub-regional partnerships in 2021 projects that green skills will account for 46 % of total construction labour demand in South London between 2023-27, and that taking no action to fill these roles will lead to a 7 % decline in the local construction sector.

Current and Projected demand for occupations	Skills in demand	Curriculum
Scaffolders Steel erectors/structural Civil engineering operatives Wood trades and interior fit-out Electrical trades and installation Building Envelope specialists Construction and trade supervisors Plumbing and HVAC traders Construction Project Manager External Wall Insulators	Skilled trades Managerial skills Manual dexterity skills Scaffolding Ground working CSCS card/tickets Retrofit/low carbon technologies upskilling/reskilling Industry specific work readiness skills Digital Skills (BIM)/Communication Housing maintenance Internal and external wall insulation	<i>We expect training Providers/educators to ensure that curriculum is developed to meet in demand occupations and skills identified in the LSIP. We expect these to be delivered through a range of programmes including 16-18 study programmes, T'levels, A'levels, apprenticeship, Adult Education Funded provision and community learning.</i>

## Skills issues

There was a high level of recruitment activity in the sector but also widespread recruitment difficulties and skills shortages, particularly in scaffolding, ground working and labouring to meet local demand, and with a lack of provision particularly in scaffolding. There was felt to be a need for more training at Levels 1 and 2 to get people into the industry, who could then develop into trades roles, but the short-term project nature of much of the sector and a high level of self-employment and SMEs made it harder to develop training pipelines. Funded CSCS card training was also highlighted as a key training need, particularly as regulatory changes may lead to many current workers losing their cards in the coming years.

Green/retrofit will lead to strong demand for related trades, which would require existing workers to gain new competencies and for entry level courses to encompass green technologies (heat pumps, electric vehicle charging infrastructure etc.). There was also a need for training for new entrants to encompass core employability skills as well as sector skills – good work ethic, good

communication skills etc. – with employers often seeking these skills over technical skills for elementary roles and then training new entrants.

Priority	Challenge	Actionable Priority
<b>Boosting the numbers of people in the construction sector and increasing diversity of the workforce</b>	<p>Improving and challenging perception of the industry</p> <p>Lack of diversity and underrepresented groups within the workforce</p>	<p>Identifying funding opportunities for green skills provision for 16-18 to improve pipeline of young people into sector and adapting the language to directly link green construction to positive impacts on the environment.</p> <p>Boosting the number of people in the sector' - Work with CITB, Women in Construction and other industry bodies to work on increasing recruitment of underrepresented groups, for example through providing employer led women in construction courses</p>
<b>Responsive skills &amp; training provision to meet current and future demand of the construction sector</b>	<p>High demand for green skills roles and expansion of sector</p> <p>Specific skill need shortages e.g. scaffolding</p> <p>Lack of progression pathways or jobs following training</p>	<p>Level 1 and 2 construction courses should be increased, specifically for scaffolding and building envelopes and insulation to meet retrofit demands and adding 'bolt-ons' in specific skills, such as roller dumper or trades to CSCS training, in order improve construction training locally and ensure that candidates are job ready.</p> <p>Improve access to short higher-level (L3, L4 &amp; L5) courses in construction management and retrofit coordination</p> <p>Funding of construction courses should incorporate licence to practice/CSCS card</p>
<b>Working with Employers to increase work placements and improve teaching skills in the construction sector</b>	<p>Lack of tutors to deliver construction training</p> <p>Lack of onsite experience</p>	<p>Improve/increasing work with employers to harness industry expertise to help upskill existing teaching staff (CPD) and ensure teaching is up to date with new and emerging technologies.</p> <p>Explore the potential to use S106 and employment and skills plans, for employers to provide a range of skills support, as identified in the SLP Building the Future toolkit to include Supported Internships, teaching/training hours, experiences of the world of work, T 'level placements.</p>

## 5 Information and communication

### Key statistics

The information and communication sector accounted for just under 5% of all employees in the SLP area in 2021, with 20,000 employees working in the sector. This is a slightly higher proportion than nationally (4.7% compared with 4.4% in GB) but below the proportion across London (8.4%) (Business Register and Employment Survey (2021)). The sector accounted for twice as high a proportion in Richmond upon Thames (7.6%) as in Croydon (3.6%) or Sutton (3.1%). Richmond upon Thames had sizeable publishing, and film and television sub-sectors which together account for 2.5 % of total employment compared with 0.8 % nationally, while in all Boroughs the computer programming and consultancy sub-sector is the largest digital sub-sector, as it is nationally (Business Register and Employment Survey (2021)).

The majority of all workers in the sector (58%) were in professional occupations, with most of the rest in associate professional/technical occupations (19%) or managerial occupations (13%) (LFS (2022)).

In terms of workforce demographics:

- Just over two thirds of workers (69%) were male, compared with 52 % of all workers
- One in three workers (34%) were from ethnic minority backgrounds, compared with around 39 % of all workers
- The sector has low proportions of young and old workers – only 13 % were aged under 30 compared with 18 % across all sectors, and only 16 % were aged 55 and over, compared with 20 % across all sectors
- The proportion of workers with a disability was slightly below the average across all sectors, at 14 % compared with 16 % of all workers; and
- Three quarters of all workers (76%) had a degree or equivalent or higher qualification, considerably above the proportion across all sectors of 55 %, and only five % had qualifications below GCSE level or no qualifications, well below the proportion across all sectors (13%) (LFS (2022)).

In information and communications, all sub-sectors are projected to increase in size, with employment in broadcasting increasing by 6% and employment in information services increasing by 20% (IER (2021)). The number of professional workers is projected to increase by 31%, although there are much smaller projected increases for managerial and associate professional/technical workers, of around 3%.

Current and Projected demand for occupations	Skills in demand	Curriculum
Programmers and software development professionals Information technology professionals n.e.c IT managers	Communication Solutions Client management Management Technical and skilled support	<i>We expect training Providers/educators to ensure that curriculum is developed to meet in demand occupations and skills identified in the LSIP. We expect these to be delivered through a range of programmes including 16-18 study programmes, T'levels, A'levels,</i>



IT business analysts, architects and systems designers Arts officers, producers and directors Information technology directors IT user support technicians	Advanced or specialist IT skills Solving complex problems Complex numerical or statistical skills New AI technologies Cyber security Creative technology e.g., Autocad, Graphic Design, Games animation & software Digital marketing provision	<i>apprenticeship, Adult Education Funded provision and community learning.</i>
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## Skills issues

In addition to current skills needs for professional and technical roles in the sector, the development of AI will lead to demands for jobs and skills specifically related to developing and supporting AI systems, in terms of AI professional and technical roles, and in understanding how the new developments can be applied in the business context. However, AI is also likely to create a skills shift, with some jobs being replaced by AI, likely at the lower end of the occupational scales. This will create a need to reskill staff that have been displaced by automation or develop them into new roles.

Priority	Challenge	Actionable Priority
<b>Working with Employers to ensure skills needs are included within training provision</b>	Increasing prevalence of specialist IT skills such as games animation and artificial intelligence	Improve engagement between tech and digital companies with educational institutions to ensure that skill training is technically relevant and up to date. Potentially through a south London Curriculum Advisory panel for information, communication and technical skills which could be supported through the Mayor Academy Digital Hub

## 6 Hospitality and retail

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### Key statistics

The hospitality and retail (including wholesale) sector in the SLP area employed nearly 100,000 employees in 2021, accounting for 23% of all employees, slightly higher than the national proportion but considerably higher than the proportion across London of 19 %. The retail and wholesale sub-sector was twice as large as the accommodation and food sub-sector (15.5% and 7.7% respectively) (Business Register and Employment Survey (2021)). There was relatively little variation across the Boroughs in the proportion of employment accounted for by hospitality and retail, ranging from a low of 20.7 % in Sutton to a high of 25.5 % in Merton (Business Register and Employment Survey (2021)).

The sector has a range of occupations, from managerial to elementary. Sales and customer service occupations were the largest group, accounting for 25 % of all employees, followed by elementary occupations (19%), skilled trades occupations (which includes chefs, 13%), and managerial occupations (12%) (LFS (2022)).

In terms of workforce demographics:

- Just under half of all employees (47%) were female, similar to the figure across all sectors (48%)
- Just under half (45%) were from ethnic minority backgrounds, mostly those from Asian backgrounds, compared with around 39 % of all workers
- More than one in four workers (28%) were aged under 30, compared with 18 % across all sectors, and a further 30 % were aged between 30 and 40, compared with 26 % across all sectors
- 15% of workers had a disability, slightly below the proportion across all sectors of 16%; and
- One in four workers (25%) had a degree or equivalent or higher qualification, considerably below the proportion across all sectors of 55%, and a further quarter (24%) had A-levels/Level 3 qualifications as their highest qualification level (compared with 17% across all sectors), and a similar proportion (25%) had qualifications below GCSE level or no qualifications<sup>6</sup>, nearly twice as high as the proportion across all sectors (13%) (LFS (2022)).

Within hospitality and retail there are markedly different projections for the two sub-sectors, with employment in hospitality projected to increase by 25% between 2020 and 2035, while employment in retail (including wholesale) is projected to fall by 1%. Looking at occupational patterns, in hospitality there are projected increases for all occupational groups, although the largest group in employment terms, elementary occupations, is projected to have the smallest increase, of 13%. In retail, there are projected increases for professional and associate professional occupations, of 22% and 7% respectively, but the number of sales and customer service workers is projected to fall by 12% (IER (2021)).

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<sup>6</sup> Or did not know their qualification level.

Current and Projected demand for occupations	Skills in demand	Curriculum
Sales and retail assistants Kitchen and catering assistants Managers in retail Chefs Customer service supervisors Delivery drivers and couriers Business, research and administrative professionals Waiters and waitresses Managers and directors in retail and wholesale Retail cashiers and check-out operators Bar staff Warehouse operatives Sales supervisors - retail and wholesale Restaurant and catering establishment managers and proprietors	Food skills Management skills Customer service Management Skills Core/transferable skills English language Numeracy skills Basic IT skills Work readiness Industry specific digital skills	<i>We expect training Providers/educators to ensure that curriculum is developed to meet in demand occupations and skills identified in the LSIP. We expect these to be delivered through a range of programmes including 16-18 study programmes, T 'levels, A 'levels, apprenticeship, Adult Education Funded provision and community learning.</i>

## Skills Issues

Beyond skills shortages retail and hospitality primarily faces a labour shortage issue with high competition from other sectors for workers to perform entry level roles. Consultations suggested that the key skills gaps in the sector were transferable skills, especially functional skills, and work readiness. Employers struggled to find workers with the English language, numeracy and basic IT skills needed to fulfil their roles, as well as a lack of work readiness among applicants (see section 4.3).

Priority	Challenge	Actionable Priority
<b>Ensuring the projected increase in demand in hospitality can be met</b>	High competition from other sectors at entry level	See boosting Learner numbers
<b>Targeted skills &amp; training to reflect the diversity and accessibility of the workforce in the hospitality and retail sector</b>	Comparatively young and diverse workforce	Develop and strengthen employment skills programmes for hospitality and retail to include vocationally relevant communication and numeracy and strengthen core/transferable skills for sector related to vocational training
<b>Working with employers to increase awareness of progression within the hospitality and retail sector</b>	need for more work experience for younger residents and those with barriers to employment	Work with employers to create more innovative experiences of the world of work to encourage more people into the sector

## 7 Education

### Key statistics

The education sector in SLP accounted for just over one in ten employees (10.6%, 45,000 employees) and was larger in comparison with both London (7.3%) and nationally (8.7%). The sector was larger in Kingston upon Thames and Richmond upon Thames (12.8% and 12.2% respectively) than in the other three Boroughs (around 10% in each), largely due to the higher education provision in the former Boroughs (Business Register and Employment Survey (2021)).

In terms of workforce demographics:

- Female workers accounted for 70% of all workers in the education sector, above the proportion of 52 % across all sectors
- One in three workers (32%) were from ethnic minority backgrounds, compared with around 39% of all workers. The proportion from Asian backgrounds was below the average across all sectors (13% compared with 22%) although the proportions from Black, mixed, or other backgrounds were the same as or above the overall averages
- The education sector has a relatively older age profile, with 15% of workers aged under 30 (compared with 18% across all sectors) and 62 % aged 40 and over (compared with 56% across all sectors)
- 17% of workers had a disability, slightly above the proportion across all sectors of 16%; and
- Three quarters of workers in the education sector (76%) had higher education qualifications (72% with degrees or equivalent or higher, and a further 4% with HE qualifications below degree level), compared with the proportion across all sectors of 60 %. Only five % had qualifications below GCSE level or no qualifications<sup>7</sup>, less than half the proportion across all sectors (13%) (LFS (2022)).

Employment in education is projected to remain broadly stable (a decrease of 0.6% between 2020 and 2035) compared with the increase in overall employment of nine %. There is a small projected increase in professional occupations, of 3.4 %, while the number of associate professional/technical workers and caring, leisure and other services workers, of 1.1 % and 4.7 % respectively (IER (2021)).

Current and Projected demand for occupations	Skills in demand	Curriculum
Primary education teaching professionals Secondary education teaching professionals Teaching professionals n.e.c. Higher level teaching assistants	Communication Teaching Management First Aid Working with Children and young people	<i>We expect training Providers/educators to ensure that curriculum is developed to meet in demand occupations and skills identified in the LSIP. We expect these to be delivered through a range of programmes including 16-18 study programmes, T'levels, A'levels,</i>

<sup>7</sup> Or did not know their qualification level.

Teaching assistants Educational support assistants Higher education teaching professionals Special needs education teaching professionals School midday and crossing patrol occupations School secretaries Kitchen and catering assistants Early education and childcare assistants Sports coaches, instructors and officials Head teachers and principals Further education teaching professionals and assistants Driving instructors Early education and childcare services managers	Planning Policy Coaching Basic IT, maths and English Team working	<i>apprenticeship, Adult Education Funded provision and community learning.</i>
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## Skills issues

Consultations suggested that employers in the education sector were struggling to fill vacancies in early years, primary and secondary education including nursery nurses, teaching assistants and teachers. Providers also reported that they struggled to find tutors for new and emerging technologies including high level IT skills, AI, automation, and green skills.

Priority	Issue	Actionable Priority
<b>Ensuring that workforce supply can keep pace with demand for education professionals</b>	High demand in subregion although stable growth.  Challenges of recruiting teachers and school staff  Lack of tutors for further education and higher education	Explore focusing on specific cohorts (e.g. retirees, graduates, economically inactive etc) to encourage them to teach basic skills and vocationally relevant skills, working more flexibly
<b>Increase tutors in the further education and Adult education sector</b>	Lack of available tutors to teach across the FE and adult skills sector	Develop a simple model and collectively market a south London 'Train the Trainer' course, specifically aimed at employers to boost capacity across the education sector
<b>Working with Employers to ensure that training providers benefit from industry expertise</b>	Existing trainers, assessors, tutors and teacher do not always have up to date knowledge and skills, particularly sectors where there have been rapid change.	Strengthening social value commitments, through public and private sector procurement, to encourage more industries/employers/businesses to work with educational institutions and provide support for current tutors (CPD), deliver masterclasses to students and support curriculum development and evaluation based on local and sector needs.

## 8 Part 3: Delivering the LSIP

The South London Partnership annex of the London LSIP will form the foundations of the SLP Skills and Employment Strategy for the next 3 years. Sustainable collaboration between agencies to protect the consistency and unity of the demands signalled by the LSIP is required.

There are significant workforce requirements that the existing provider infrastructure, employers, and stakeholders cannot address in isolation. We will require an infrastructure that will forge and strengthen collaboration and bringing together providers, employers, and other stakeholders **to ensure impactful and measured changes are driven by the LSIP.**

We are proposing to establish a new LSIP board and create a shared skills and employment covenant.

Developing robust and impartial sub-regional governance, will provide this accountability and ensure the delivery of priorities and establish meaningful output measures, against which the collective contributors can be held accountable.

This will include an overarching, multi organisational commitment to supporting the structural and operational changes required to deliver a demand led skills system that prepares south Londoners for current and future jobs and helps our businesses and economy thrive and grow.

See Annex A for the list of actionable priorities

Priority	Issue	Actionable Priority
<b>Ensure impactful and measured changes driven by the LSIP</b>	There are multiple stakeholders with various levers and opportunities to deliver operational and structural changes. We need to ensure that key players are held accountable to deliver actionable priorities	Create a governance structure in south London that will be accountable for monitoring and overseeing the delivery of actions of the London and the south London annex of the LSIP
	There are various factors which drive organisational and individual activity within the skills ecosystem. It is vital that key players are working toward shared values, outcomes, and outputs.	Create a framework, by way of a concordat/agreement that sets out responsibilities and accountabilities for delivery of the LSIP for businesses, training providers, anchor institutions and stakeholders supporting skills and employment in south London.



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# South London Partnership annex to the London Local Skills Improvement Plan

Appendix report



## 9 Supporting Documentation: Annex and Method

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This document includes the SLP annex roadmap to delivering the actionable priorities identified in the SLP annex of the London Local Skills Improvement Plan. It also includes the methodology of approach, data tables and analysis of the evidence reviewed to accompany the SLP LSIP Local Annex.



# 10 Annex A: Roadmap for delivering the LSIP Actionable Priorities

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
<b>Delivering the LSIP Priorities'</b>						
<b>Ensure impactful and measured changes driven by the LSIP</b>	Create a governance structure in south London that will be accountable for monitoring and overseeing the delivery of actions of the London and the south London annex of the LSIP	SLP, Training Providers (TP), employers	LSIF, LSIP	Short	Funding	Ensure provision funding provision is made Identify stakeholders Test with the market
	Create a framework, by way of a concordat/agreement that sets out responsibilities and accountabilities for delivery of the LSIP for businesses, training providers, anchor institutions and stakeholders supporting skills and employment in south London.	SLP, Training Providers (TP), employers	LSIF,LSIP	Short	Commitment from multiple stakeholders required	Test the market Draft the first version
<b>Engaging Employers and Improving Pathways</b>						
<b>Strengthening relationships between employers and providers</b>	Explore funded roles to lead co-ordination between employers and providers e.g., exploring a South London skills brokerage system to complete training needs analysis of organisations, identification of jobs, and signpost them to the right educational provider.	Lead LSIF partner, BL	LSIF	short	Funding allocations	Ensure provision identified in LSIF
	Explore development of digital learning platforms, information-sharing and marketing activities to promote higher levels of awareness and engagement of skills provision.	Providers, SLP	LSIF, Integration Hub, Training Providers (TPs)	short	Funding Volume of provision	Start stakeholder engagement to identify organisational capacity
	Explore collaborative recruitment campaign for tutors and trainers, targeted at employers, for all educational institutions, to encourage more people into the education sector, specifically into vocation and technical teaching and basic skills (English, maths and digital skills).	Providers and employers	Training providers, employers, LSIF	Medium	Structural challenges e.g. competitive salaries	Convene TPs to identify appetite for collaboration Survey to ERBs and business to anticipate challenges
	Work with the SLP Careers Hub to develop a strategic approach to work experience and T Level placements to contribute to	Careers Hub (CG), GLA, employers	Careers Hub (GLA), CEC	Short	Knowledge building	Meet with Career Hub to develop an action plan

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
	employability levels and improve work-readiness levels among young entrants to the job market				Identifying employers in volume  Capacity to oversee delivery across multiple sectors	
<b>Boosting learner demand for key sectors</b>	Working with employers and linking them to existing assets such as the Careers Hubs, Mayors Academy Hubs, employment support programmes and job brokerage services to raise the profile of careers and pathways of sectors with high job vacancy and skills shortages across all priority sectors	Employers, TPs, CH, Local Authorities (LA)	Careers Hub, TP core budget, S106	medium	Volume of need vs capacity to deliver  Employer capacity to support	Review and gap analysis of current delivery with a sector focus
<b>Increasing use of Apprenticeships</b>	Improving employer awareness and access to support through the apprenticeship levy and working with organisations, such as the London Progression Collaboration, to make it easier for businesses to engage with apprenticeships.	TPs, ERB, LPC, employers, public sector organisations	Apprenticeship levy, employers, TP core budget	Medium	Volume of demand exceeds capacity of LPC	Explore collaborative campaign to employers
	Boost the number of 16-18 choosing apprenticeships through more employer and training provider engagement with schools across south London	CH, ASK, TPs	CH – GLA & CEC, DfE, TPs core, LA core	Long	External factors prohibiting 16-18 such as loss of benefits	Scope potential activity, building on PALs legislation requirements
	To develop/promote better steppingstone or bridging qualification through business administration to support new entrants into the sector, filling the gap left by the removal of the L2 business administration apprentices	TPs, LSIF Lead	LSIF, Study programme, UKSPF	Long	Funding  Awarding organisations/IFAS refusal	TPs to identify potential qualifications
<b>Cross Cutting Themes</b>						
<b>Build awareness and knowledge of Green Skills roles and pathways</b>	Improve access to/provide more L1-L5, including modular and short qualification, supporting green industries – specifically courses such as retrofit, project management, envelope trades and installation of green technology	TPs, Mayors Green Skills Academy (GSA)	AEB, Apprenticeships, LSIF	Long	Creating demand in sector  Availability of affordable courses	Further skills gap analysis with local providers

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
	Use the Green Skills Academy Hub to develop a collective brand and shared communication strategy to raise awareness and improve knowledge of the green skills, jobs and careers across south London	TPs, GSA, ERB	GLA, TPs, SDF, LSIF	Medium	Speed of delivery	Scope with training providers
<b>Improving provision of Digital Skills (Technology)</b>	Explore commissioning research to understand impacts of AI and automation on the jobs across south London and develop a plan to mitigate impacts on south Londoners job opportunities through skills development	LSIF Lead	LSIF	Medium	Funding	Scope prospectus
	Improving basics skills for IT, specific to a sector and relevant to the technology used – this could be embedded and/or stand alone – across all priority sectors	TPs, GLA, LAS	AEB, Apps, Study programmes, Community Learning (CL), S106	Long	Speed of course development Tutors to develop curriculum	Set challenge to TP SLT for development over next year
<b>Entrepreneurialism</b>	Entrepreneurial skills to be embedded across the curriculum for all educational institutions to support innovation and business growth.	TPs, GLA	AEB, Apps, Study programmes, Community Learning	Long	Speed of course development Ensuring it is meaningful and responsive to demand	Identify business influencers to shape course content Scope implementation
<b>Transferable Skills</b>	Core skills e.g. team work, communication, punctuality and expected work behaviours to be embedded across all skills and training programmes as standard and explore a South London Employment standard that focuses on core employment skills and behaviours including resilience, problem solving and mindset	TPs, GLA	AEB, Apps, Study programmes, Community Learning, LSIF	Long	Speed of course development Ensuring it is meaningful and responsive to demand Finding funding/course approvals	Link to the Future Skills work of Kingston Uni and map opportunities to codevelop a south London standard
<b>Promoting inclusion and diversity in the workforce</b>	Encourage training providers to promote and deliver training to groups where there is an under-representation in specific sectors e.g., women in construction and tech.	TPs, GLA	AEB, Apps, Study programmes, Community Learning,	Medium	Attracting underrepresented Cohorts TPs not incentivised to diversify course starters	Explore further analysis of priority sector and underrepresentation to identify targets/areas of focus

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
	Support employers to develop a more inclusive workforce through training and knowledge building to drive inclusive recruitment and retention practices. Including training and tools for employers/businesses and their managers to support employees with disabilities, mental health conditions, SEND and neurodivergence, and long-term health conditions (including menopause).	SLP, ERB, employers, Integration Hub, TPs	GLA, Integration Hub, UKSPF, DWP	Long	Employer adaptability Decreasing vacancies	Scope potential activities with the Integration Hubs
<b>Health and Care</b>						
<b>Increase skills &amp; training provision required by the Health and Care sector</b>	Vocationally relevant ESOL, communication and cultural skills training, with a focus on supporting international recruitment and migrant workforce	TPs, employers	LSIF, AEB, CL, S106, DWP	Medium	Speed of development	TPs to conduct analysis of need with care employers
	Business training for managers, to include developing skills on budgets and finance, marketing and recruitment and learning and development and coaching training for managers	TPs	LSIF, AEB, Apprenticeships, CL	Long	Speed of development Availability of funded qualifications	TPs to explore funding and qualifications to support care managers
	Develop a programme of support for new entrants to the care sector, specifically front-line workers, to include relevant vocational training and career support and pathway progression	TPs, Mayors Academy Hub, SLP	LSIF, AEB, Apprenticeships, CL, GLA, LA	Long	Access to fundable courses Continuing vacancy gaps	Mayors Academy and TPs to scope available relevant qualifications
	Improve supply of short courses e.g. professional youth work qualifications, functional skills for health and care L5 care management.	TPs	LSIF, AEB, Apprenticeships, CL, UKSPF	Long	Funding for L3 above Accessibility for learners Backfilling staff	TPs to explore developing training to fill gaps through LSIF
	Conduct deeper analysis into health and social care gaps and linking with strategic health and social care workforce activity via SLP and the Integrated Care Board.	SLP, ICB, Mayors Academy	SLP, ICB	Long	Breadth of the qualifications and jobs within scope	To scope potential commission
<b>Construction and the Built Environment</b>						
<b>Boosting the numbers of people in the construction sector and</b>	Boosting the number of people in the sector <sup>1</sup> - Work with CITB, Women in Construction and other industry bodies to work on increasing recruitment of underrepresented groups, for example through providing employer led women in construction courses	TPs, Industry bodies, employers	LSIF, AEB, Apprenticeships, CL, s106, DWP	Medium	Identifying learner supply chain Carving employment opportunities for certain cohorts	TPs to identify potential development opportunities

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
<b>increasing diversity of the workforce</b>	Identifying funding opportunities for green skills provision for 16-18s to improve pipeline of young people into sector and adapting the language to directly link green construction to positive impacts on the environment	TPs, Mayors Academy Hub	16-18 Study programme, apprenticeships, S106, UKSPF	medium	Awarding bodies developing qualifications	To identify applicable courses and complete deeper dive in gap analysis
<b>Responsive skills &amp; training provision to meet current and future demand of the construction sector</b>	Level 1 and 2 construction courses should be increased, specifically for scaffolding and building envelopes and insulation to meet retrofit demands and adding 'bolt-ons' in specific skills, such as roller dumper or trades to CSCS training, in order improve construction training locally and ensure that candidates are job ready	TP's, employers	LSIF, AEB, Apprenticeships, CL, s106, DWP, 16-18 study programmes	Short/medium	Facilities/infrastructure for delivery	Feasibility study for development of infrastructure Asset assessment of available infrastructure
	Funding of construction courses should incorporate licence to practice/CSCS card	TPs	LSIF, DWP, S106	Short	Consistency of funding Infrastructure to test	Identify funding options
	Improve access to short higher-level (L3, L4 & L5) courses in construction management and retrofit coordination	TPs	LSIF, AEB, Apprenticeships, CL, s106, DWP, 16-18 study programmes	Short	Accessibility/affordability of higher-level qualifications Access to L3 qualifications	Deeper dive on all courses available and funding options
	Improve/increasing work with employers to harness industry expertise to help upskill existing teaching staff (CPD) and ensure teaching is up to date with new and emerging technologies	TPs, employers, LAs	Employers (social value) S106, TP core budget, LSIF	medium	Capacity of employers with existing workforce challenges	Work with LAs to identify potential developer partners Analysis of tutor skills/knowledge gap
	Explore the potential to use S106 and employment and skills plans, for employers to provide a range of skills support, as identified in the SLP Building the Future toolkit to include Supported Internships, teaching/training hours, experiences of the world of work, T'level placements.	LA's	LAs, SLP	Medium	Geographical variances due to borough restrictions	SLP to work with LAs to explore potential to develop s106 agreements to reflect demands

## Information and Communication

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
<b>Working with Employers to ensure current and future IT and communication skills needs are included within training provision</b>	Improve engagement between tech and digital companies with educational institutions to ensure that skill training is technically relevant and up to date. Potentially through a south London Curriculum Advisory panel for information, communication and technical skills which could be supported through the Mayor Academy Digital Hub	TPs, GLA, Digital Academy, Surrey British Computer Society	Core budget, employers, GLA, LSIF	Short	Reaching the breadth of IT/Tech/digital employers	To explore digital hub and potential governance arrangement  Identify CPD requirements for existing staff
<b>Hospitality and Retail</b>						
<b>Targeted skills &amp; training to reflect the diversity and accessibility of the workforce</b>	Develop and strengthen employment skills programmes for hospitality and retail to include vocationally relevant communication and numeracy and strengthen core/transferable skills for sector related to vocational training.	TPs, employers	LSIF, AEB, Apprenticeships, CL, DWP	Medium	Supply of learners	Deep dive into specific employer need
<b>Working with employers to increase awareness of progression</b>	Work with employers to create more innovative experiences of the world of work to encourage more people into the sector	Employers, Careers Hub, Training providers	CEC/GLA, employers, s106	Medium	Supply of employers offering opportunities	Assessment of current activity  Deliver hospitality event
<b>Education</b>						
<b>Ensuring that workforce supply can keep pace with demand</b>	Explore focusing on specific cohorts (e.g. retirees, graduates, economically inactive etc) to encourage them to teach basic skills and vocationally relevant skills, working more flexibly	SLP, LA's, DWP, TP's	UKSPF, LSIF	Medium	Identifying cohorts/finding the people	Scope out engagement opportunities and potential skills support offer

Priority	Actionable Priority	Stakeholders	Programme/Funding	When	Potential Barriers	Next Steps
<b>Increase tutors in the further education and Adult education sector</b>	Develop a simple model and collectively market a south London 'Train the Trainer' course, specifically aimed at employers to boost capacity across the education sector	TPs	LSIF	Long	Creating collaborative content	TPs to complete deeper dive analysis on current delivery and pathway/route to teaching
<b>Working with Employers to ensure that training providers benefit from industry expertise</b>	Strengthening social value commitments, through public and private sector procurement, to encourage more industries/employers/businesses to work with educational institutions and provide support for current tutors (CPD), deliver masterclasses to students and support curriculum development and evaluation based on local and sector needs.	SLP, LA's, TPs, employers	S106, LSIF	Long	Identifying/attracting employees  Flexibility of delivery for employed staff	Scope project with LAs

Monitoring the effective delivery and impact of the LSIP actionable properties has not yet been finalised.

# 11 Acknowledgements

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Achieving for Children: Way 2 Work	Love Wimbledon BID
Association of Employment and Learning Providers (AELP)	McLaughlin & Harvey
BusinessLDN	Merton Adult Education
Berkeley Group	National Careers Service
Croydon Adult Learning and Training (CALAT)	NHS SWL
Careers and Enterprise Company	Nickel Support
Department of Work and Pensions	Orchard Hill College
Richmond Chamber of Commerce	Palace for Life Foundation
Merton Chamber of Commerce	Reed in Partnership
Kingston Chamber of Commerce	Refugee Action Kingston
Croydon Chamber of Commerce (South East Division)	Richmond and Hillcroft Adult Education
Chartered Institute of Personnel and Development	Richmond Hill Hotel
Chessington World of Adventure	Richmond Upon Thames College
Choice Support	Richmond Workmatch
Construction Industry Training Board (CITB)	Roehampton University
Clarion Housing Group	Royal Borough of Kingston upon Thames
Community Action Sutton	Skills for Care
Cross Industry Construction Apprentice Taskforce	South London Careers Hub
Croydon College	South London Partnership
Croydon Works	South Thames College Group
Edge Foundation	South Wimbledon Business Area BID
Federation of Master Builders	South West London Integrated Care Board
JACE Training	South West London and St George's Mental health Trust (NHS)
Job Centre Plus - Croydon	Strive Training
Job Centre Plus - Kingston	Sussex Innovation
Job Centre Plus - Merton & Sutton	Sustainable Merton
Job Centre Plus - Richmond	Sutton College
John Ruskin College	TG Consulting Ltd
Kingston Adult Education	The Insulation Assurance Authority
Kingston University	United Living
London Borough of Croydon	University College of the Arts (Wimbledon)
London Borough of Merton	University of Roehampton
London Borough of Richmond Upon Thames	Youthbuild ventures UK
London Borough Sutton	
London Learning Consortium	



## 12 Annex B: Project Methodology

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### South London Partnership

South London is a voluntary partnership of the five south London boroughs Croydon, Kingston, Merton, Richmond, and Sutton. Working together and with partners and stakeholders, from the SLP and beyond, we work collaboratively and innovatively to enable our residents and businesses to grow and thrive. Building on many years of collaborative working, SLP focuses on issues where working together can add value to what individual organisations can achieve on their own. By working together, we add value to the activity led by individual boroughs through collaboration and co-ordination, strategy and policy development, promotion and representation, and delivering joint programmes (currently worth £30 million).

### Institute for Employment Studies

The Institute for Employment Studies is an independent, apolitical, international centre of research and consultancy in public employment policy and organisational human resource management. It works closely with employers in the manufacturing, service and public sectors, government departments, agencies, and professional and employee bodies. For 50 years the Institute has been a focus of knowledge and practical experience in employment and training policy, the operation of labour markets, and human resource planning and development. IES is a not-for-profit organisation which has around 50 multidisciplinary staff and international associates. IES expertise is available to all organisations through research, consultancy, publications and the Internet. Our values infuse our work. We strive for excellence, to be collaborative, and to bring curiosity to what we do. We work with integrity and treat people respectfully and with compassion.

### Inclusive Terminology

The terminology used to define ethnicity continues to evolve, and greater awareness has arisen about gender, cognitive differences as well as of disability. IES seeks to be a learning organisation; as such we are adapting our practice in line with these shifts. We aim to be specific when referring to each individual's ethnicity and use their own self-descriptor wherever possible. Where this is not feasible, we are aligned with Race Disparity Unit (RDU) which uses the term 'ethnic minorities' to refer to all ethnic groups except white British. RDU does not use the terms BAME (black, Asian, and minority

ethnic) or BME (black and minority ethnic) as these terms emphasise certain ethnic groups and exclude others. It also recommends not capitalising ethnic groups, (such as 'black' or 'white') unless that group's name includes a geographic place. More broadly, we understand that while individuals may have impairments it is society that disables them, hence we refer to disabled people. Not all people identify with male or female and we reflect their self-descriptions in our work and use the term non-binary should abbreviation be necessary. We value neurodiversity. Where possible we always use people's self-descriptors rather than impose categories upon them.

## 12.1 Local Skills Improvement Plans

Local Skills improvement Plans (LSIPs) aim to ensure the post-16 technical education system is aligned to local labour market needs. They seek to articulate the skills that employers need in a local area and set out actionable priorities and recommendations for the local skills system, so that it better meets those needs. Through doing so, they seek to ensure employers are better able to access the skills they need, driving growth and productivity, and supporting residents to access decent work.

LSIPs are led by Employer Representative Bodies. The London LSIP has been led by BusinessLDN, working with CBI London, FSB London Chamber of Commerce and Industry. Alongside the London-wide LSIP, the four sub-regional partnerships of London boroughs have worked with employers in their local area to understand how skills needs vary across the capital. This report sets out employer skills needs across the South London Partnership sub-region.

## 12.2 Methodology

The work to support the South London Partnership (SLP) LSIP annex involved analysis of a wide range of data sources on employment and skills in the sub-region, and a series of qualitative consultations with employers and other stakeholders.

### 12.2.1 Quantitative analysis

The quantitative analysis examined the current employment characteristics of the sub-region (in comparison with London and the country as a whole), and recent trends in employment, for the labour market as a whole and for the priority sectors.

The priority sectors were defined using the Standard Industrial Classification (SIC) which is a hierarchical classification with different levels of detail. Where possible, priority sectors were defined at the highest level (1-digit SIC Sections) as some of the survey sources only had breakdowns to this level, although in some cases SIC Sections were combined with 2-digit Divisions to cover the breadth of activity in the sector. The definitions are as follows:

- Health and social care – defined as SIC Section Q Human health and social work activities;

- Construction and the built environment – defined as the SIC Section F Construction plus SIC Division 71 Architectural and engineering activities;
- Information and communication – defined as SIC Section J Information and communication;
- Retail and hospitality – defined as SIC Sections G Wholesale and retail trade and I Accommodation and food service activities; and
- Education – defined as SIC Section P Education.

The analysis looked at patterns by occupations, which are classified according to the Standard Occupational Classification (SOC). As with SIC, this is a hierarchical classification with different levels of detail. Some analysis within the priority sectors looks at the most detailed level, 4-digit SOC which looks at specific jobs, while other analysis is at the highest level, 1-digit SOC, which covers broad categories e.g. managerial roles.

The analysis of employment characteristics and trends made use of the following Office for National Statistics data sources:

- the Business Register and Employment Survey (BRES) for data on employees in employment who work in the Local London area by sector for 2021, and for 2015 to compare changes over time;
- the Labour Force Survey (LFS) for data on employment by occupation, and on workforce demographics in the priority sectors. The lowest level of geographical disaggregation in the LFS is Outer London, corresponding to the Sub-Regional Partnership areas of South London Partnership, Local London, South London Partnership and West London Alliance, so the results for SLP were estimated. For the results on employment by detailed occupation in the priority sectors, the distribution of employment by 4-digit SOC at the national level for the sub-sectors within each priority sector was applied to the employment levels in the sub-sectors in the SLP area, to estimate the number of workers in each detailed job role. For the demographic analysis, the results are based on the data for the whole of Outer London; and
- the 2021 Census of Population for data on SLP residents in employment by occupation.

The analysis presents employment projections by sector and occupation for the period 2020 to 2035, for the whole of London, produced by the Institute for Employment Studies as part of the Skills Imperative 2035 programme<sup>8</sup>. The projections are produced at the 2-digit SIC level which allows precise mapping onto the SLP priority sectors, and presents breakdowns by occupational major groups (1-digit SOC). Data from Adzuna vacancies provided insights into job postings by occupation, and the skills requested for roles in the priority sectors.

The investigation into skills issues made use of three survey sources:

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<sup>8</sup> <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>

- A survey of 1,016 Business leaders and HR managers in London, carried out by Survation in December 2022. The Business Leaders 2022 poll was commissioned by BusinessLDN to support the London LSIP, with data collected via an online panel. Data were aggregated by sub-regions and SLP data is included in this sub-region report along with findings for the priority sectors for the whole of London.
- A survey of 1,369 London-based businesses (the London Business 1000 survey) which was also conducted in 2022 and was carried out by YouGov on behalf of London Councils and LCCI. The results are weighted so as to be representative of all London businesses; and
- The Employer Skills Survey, which is a national employer survey commissioned by the Department for Education (with the most recent available data from the 2019 survey). Data are collected from establishments (rather than organisations as in the other two surveys) and the results are weighted so as to be representative of all establishments.

Data on training provision in the Local London area came from the GLA Adult Education Budget, August 2021-July 2022 and the Higher Education Statistics Agency, 2021/22.

### 12.2.2 Qualitative Consultations

Qualitative information on local skills issues was collected from 110 representatives of employers/industry bodies, training providers, local authority staff, and voluntary/support/charity organisations through the following activities:

- 2 in-person workshops to explore key skills issues in the priority sectors and suggestions for actionable priorities;
- 1 in-person health and social care workshop exploring skills issues specific to the health and social care sector;
- 1 construction workshop
- 2 online mini-workshops covering similar ground to the in-person workshops; and
- 12 online interviews with employers, providers and other stakeholders.
- 2 employer surveys

Through these consultations, views were gathered from 67 employers or employer bodies, 16 providers, and 27 stakeholder organisations (boroughs etc.).

It is also worth noting that as one of our priority sectors is education, educators and training providers are also employers.

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## 13 Annex C: Technical Annex

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This chapter sets out background information about employment in the SLP area including employment projections for the whole of London by sector to 2035, and the main recruitment and skills issues affecting SLP businesses across all sectors. Subsequent chapters explore issues affecting each of the SLP priority sectors.

### 13.1 Employment by sector

Figure 13.1 shows the breakdown of employment in the SLP area compared with the whole of London, and Great Britain<sup>9</sup>.

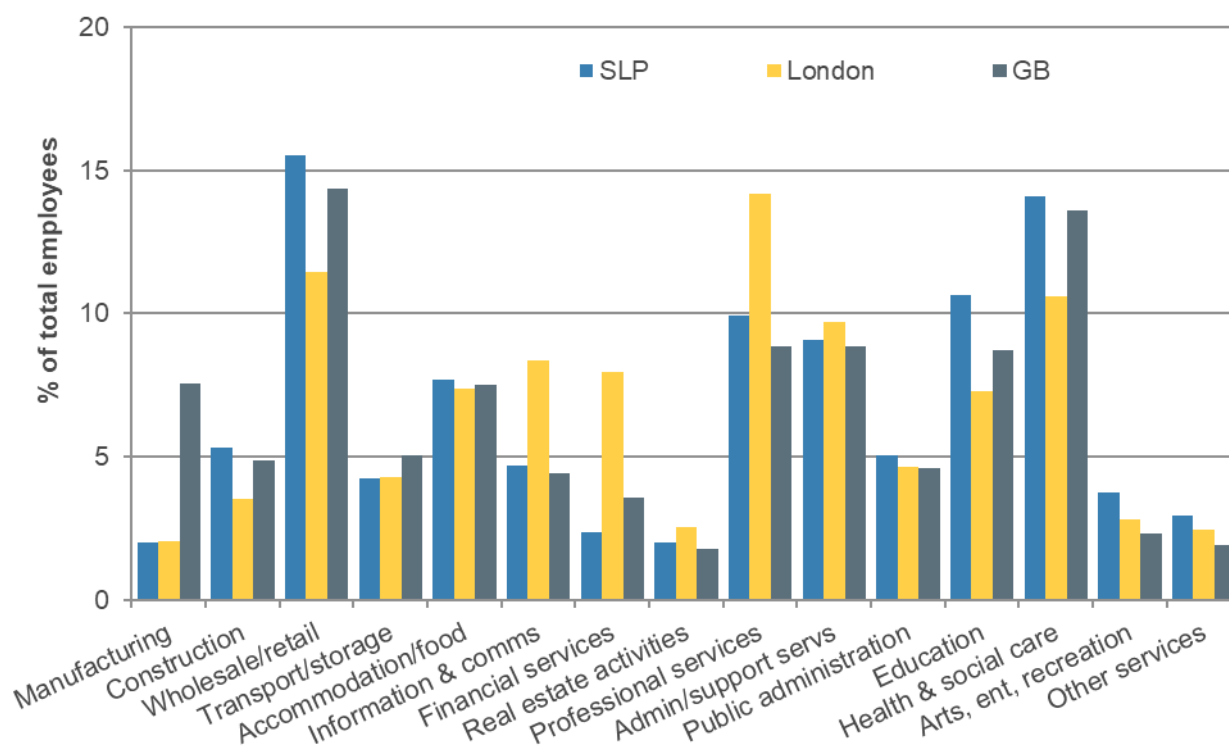
There are a number of sectors that account for a greater proportion of total employees in the SLP area than they do in London or the country as a whole. The education sector accounts for nearly 11 per cent of all employees in the SLP area, compared with seven per cent in London and 9 per cent in Great Britain. The health and social care sector is also much larger in the SLP area than in London (14.1% compared with 10.6%) but only slightly larger than in Great Britain (13.6%), as are the wholesale and retail sector (15.5% in SLP compared with 11.4% in London and 14.4% in Great Britain) and the construction sector (5.3% in SLP compared with 3.5% in London and 4.9% in Great Britain). The arts, entertainment and recreation sector, and the other services sector (which includes membership organisations and personal services such as hair and beauty) are smaller in terms of total employment size but both account for a much larger proportion of employment in SLP than in the country as a whole.

The professional services sector and real estate sector are larger in SLP than in the country as a whole, but below average in size compared with the whole of London.

The financial services sector is much smaller in SLP than in London or Great Britain (2.4% of employment in SLP) while the manufacturing sector is much smaller than in the country as a whole, but similar to the London average (2.0% of employment in SLP).

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<sup>9</sup> The figure excludes the agriculture, mining and quarrying, electricity and gas, and water supply sectors, as these are very small in numerical terms and together account for less than one per cent of all employees in SLP. The data have also been adjusted in relation to one anomalous figure for employment in a detailed sector in a single small area in Sutton, see note in Chapter 11.

**Figure 13.1 Employees in employment by sector, SLP, London and GB, 2021**

Source: Business Register and Employment Survey, 2021

### Employment trends

The main growth sectors in SLP were construction, which increased by 38 per cent, accommodation and food with an increase of 22 per cent, and public administration (central/ local government and other public sector bodies), which increased by 12 per cent. There were large falls in employment in administrative and support services, information and communication, real estate activities, and manufacturing.

## 13.2 Priority sectors

The SLP priority sectors are:

- Health and social care – this sector is large in employment terms, and accounts for a higher proportion of employment in SLP in comparison with London and Great Britain, plus it is a Mayoral priority sector;
- Construction and the built environment – this sector, combining construction with the architectural and engineering activities sub-sector within professional services, is over-represented in SLP and is a Mayoral priority sector;

- Information and communications – this sector is slightly larger in SLP compared with the country as a whole (although below the London average), it is likely to be a potential growth area over the coming years<sup>10</sup>, and is another Mayoral priority;
- Hospitality and retail – large in absolute and relative terms, and hospitality is a Mayoral priority; and
- Education – accounts for a much higher proportion of employment in SLP than in London or Great Britain, and key for addressing skills challenges and contributing to lifelong learning

### 13.2.1 Employment by occupation

The 2021 Census of Population results provide information on the occupations of employed residents in SLP (this differs from the sectoral analysis which covers those working in SLP).

The occupational distribution of SLP residents is broadly similar to that for all London residents albeit with a slightly higher proportion in managerial occupations, and slightly lower proportions in machine operatives and elementary staff.

**Table 13.1 Residents in employment by occupation in SLP, London and England, 2021 (%)**

	SLP	London	England
Managers	16.0	14.6	12.9
Professionals	25.9	25.8	20.3
Associate professionals	15.0	15.3	13.3
Administrative/clerical staff	9.2	8.5	9.3
Skilled trades occupations	7.8	7.5	10.2
Caring, leisure and other service staff	8.1	7.7	9.3
Sales and customer services staff	6.2	6.3	7.5
Machine operatives	4.5	5.0	6.9
Elementary staff	7.4	9.2	10.5

*Source: Census of Population 2021*

There is some variation between the Boroughs, with Richmond and Kingston having the highest proportion of managerial, professional and associate professional workers (73% and 62% respectively), while Sutton has the highest proportion of skilled trades workers (10%), and Croydon has the highest proportion of machine operatives and elementary staff (15%).

<sup>10</sup> Oxford Economics Post Covid Recovery report

### 13.2.2 Employment projections

Employment projects by sector can be found in section 1.1 of the SLP LSIP local annexe.

By occupation, the largest increases are projected for professional occupations (18%), associate professional and technical occupations (12%) and skilled trades occupations (12%), while the numbers of elementary workers and administrative/clerical workers are projected to fall, by one per cent and five per cent respectively.

There are markedly different forecasts for the SLP priority sectors in London. The construction and built environment sector is projected to experience rapid growth, with employment increasing by 20 per cent between 2020 and 2035, more than twice as fast as employment in London overall. The information and communications sector, and the, are also projected to experience above average employment increases, of 14 per cent, while the increase in employment in hospitality and retail is projected to match the overall increase. There is a modest projected increase for health and social care (5.6%).

## 13.3 Overall recruitment and skills picture across South London

### 13.3.1 Recruitment activity and difficulties/hard-to-fill vacancies

As discussed in section 2.4.3 of the SLP LSIP Local Annex, there is an overrepresentation of micro-business and self-employment in the SLP. This high proportion of self-employment and small and micro-business is likely to have affected survey responses around recruitment and skills in the area.

#### Recent evidence at the organisation level

The **Survation survey** asked employers to indicate whether they had current vacancies and if so how many. Around three quarters (74%) of employers in SLP said that they had current vacancies, with 21 per cent reporting 'many' open vacancies, 35 per cent reporting 'some' and 19 per cent reporting a few. Among those employers in SLP that did have vacancies, 58 per cent said that they were struggling to fill them.

#### Evidence from 2019 at the establishment level

The Employer Skills Survey 2019 found that recruitment activity in the SLP area was same as across London as a whole, with 19 per cent of establishments in the SLP area and across London reporting that they had vacancies at the time of the survey.

Among those establishments that did have vacancies, 43 per cent reported that some vacancies were hard-to-fill, above the figure for the whole of London of 38 per cent. Combining the two proportions shows that 8.3 per cent of all establishments in SLP reported hard-to-fill vacancies, below the London-wide proportion of 7.3 per cent.

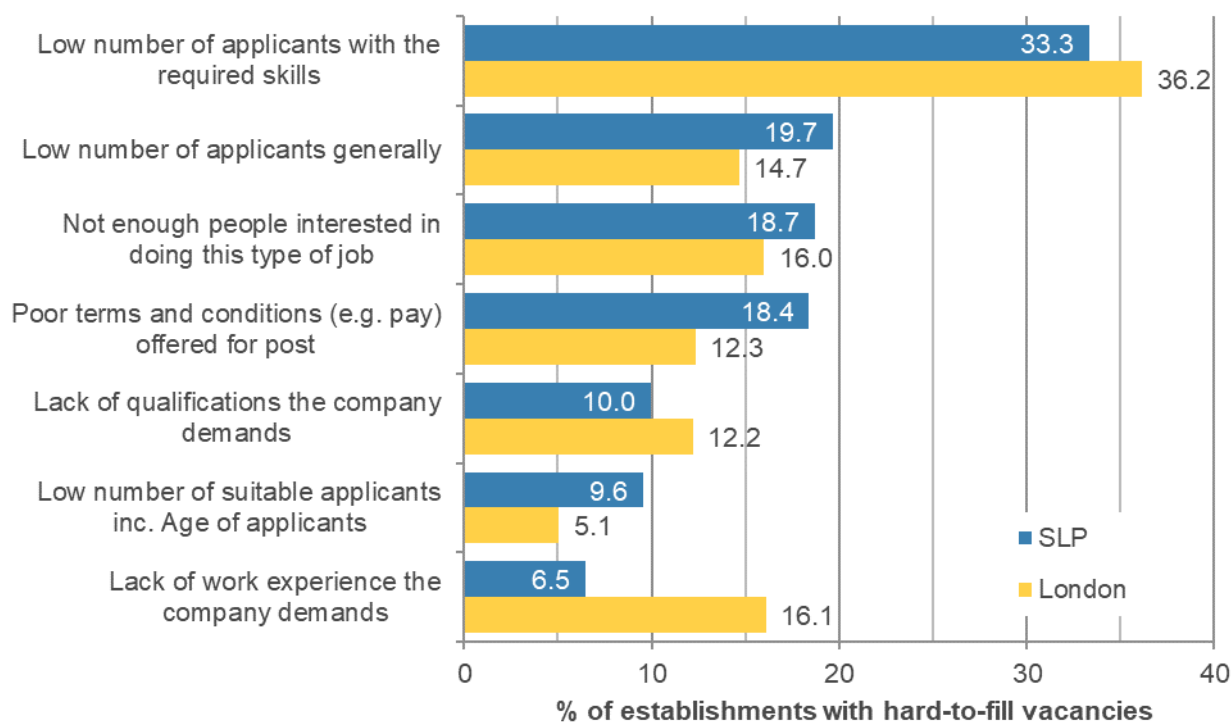


In comparison with all establishments in London with hard-to-fill vacancies, those in SLP were more likely to report hard-to-fill vacancies for:

- Caring, leisure and other services staff (19.2% compared with 13.3%);
- Skilled trades occupations (20.9% compared with 17.0% for London); and
- Associate professional and technical workers (20.6% compared with 17.2%).

There were some differences in the causes of hard-to-fill vacancies for SLP establishments in comparison with those for establishments across the whole of London. Low numbers of applicants with the required skills was the most common cause for SLP establishments as well as those across London, but with fewer SLP establishments reporting this (33.3% compared with 36.2%). SLP establishments were more likely than those elsewhere in London to report low number of applicants generally, not enough people interested in doing the type of work, poor terms and conditions, and low number of suitable applicants due to characteristics such as age as causes of hard-to-fill vacancies, and were less likely to report that lack of qualifications or work experience the company demands. There were some other, less commonly cited causes, that SLP establishments were more likely than average to report, including vacancies not being full-time or permanent (4.6% compared with 2.2% across London) and remote location or poor public transport links (4.2% compared with 2.8%).

These findings suggest that recruitment difficulties in the SLP area were often more quantitative in nature, in terms of getting enough applicants for the type of work and pay and conditions on offer, rather than qualitative in terms of applicants lacking qualifications or work experience.

**Figure 13.2 Main causes of hard-to-fill vacancies, SLP and London, 2019**

Source: Employer Skills Survey 2019

### 13.3.2 Skills shortages

#### Recent evidence at the organisation level

The **Survation survey** found that 25 per cent of all respondents in SLP (including those without any vacancies) reported skills shortages, which is lower than the 29 per cent of all respondents reporting skills shortages.

The **London Business 1000 survey** asked business what they perceived as the main challenges for their business to do with skills and the labour market in the next 12 months. The proportion of SLP business mentioning skills shortages among job applicants was 17 per cent, considerably below the proportion across all London businesses of 25 per cent.

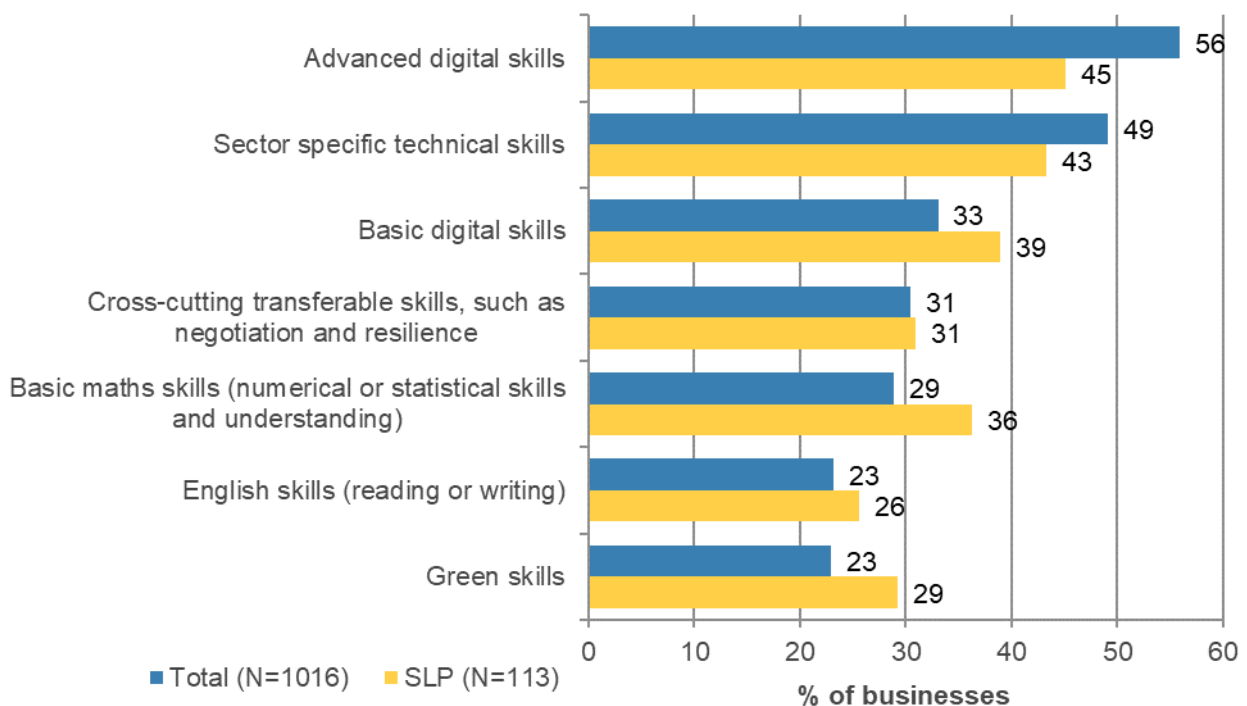
#### Evidence from 2019 at the establishment level

The 2019 Employer Skills Survey found that three quarters (77%) of establishments that reported hard-to-fill vacancies in SLP said that they had skills shortage vacancies (i.e. they were difficult to fill due to a lack of skills, qualifications or experience among applicants). This was slightly higher than the proportion across all London establishments of 75 per cent, and coupled with the above average proportion of SLP establishments with hard-to-fill vacancies, the proportion of all SLP establishments with skills shortage vacancies was above the figure for the whole of London (6.3% compared with 5.5%).

### 13.3.3 Future skills needs

The **Survation survey** asked respondents how confident they were that they understood their skills needs over the next two to five years, and which skills they felt their business would need most over the same period. In terms of the particular skills that SLP businesses felt they would need most, these were broadly in line with the patterns across London, as Figure 13.3 shows.

**Figure 13.3 Skills that businesses will need most over next 2 to 5 years, SLP and London, 2022**

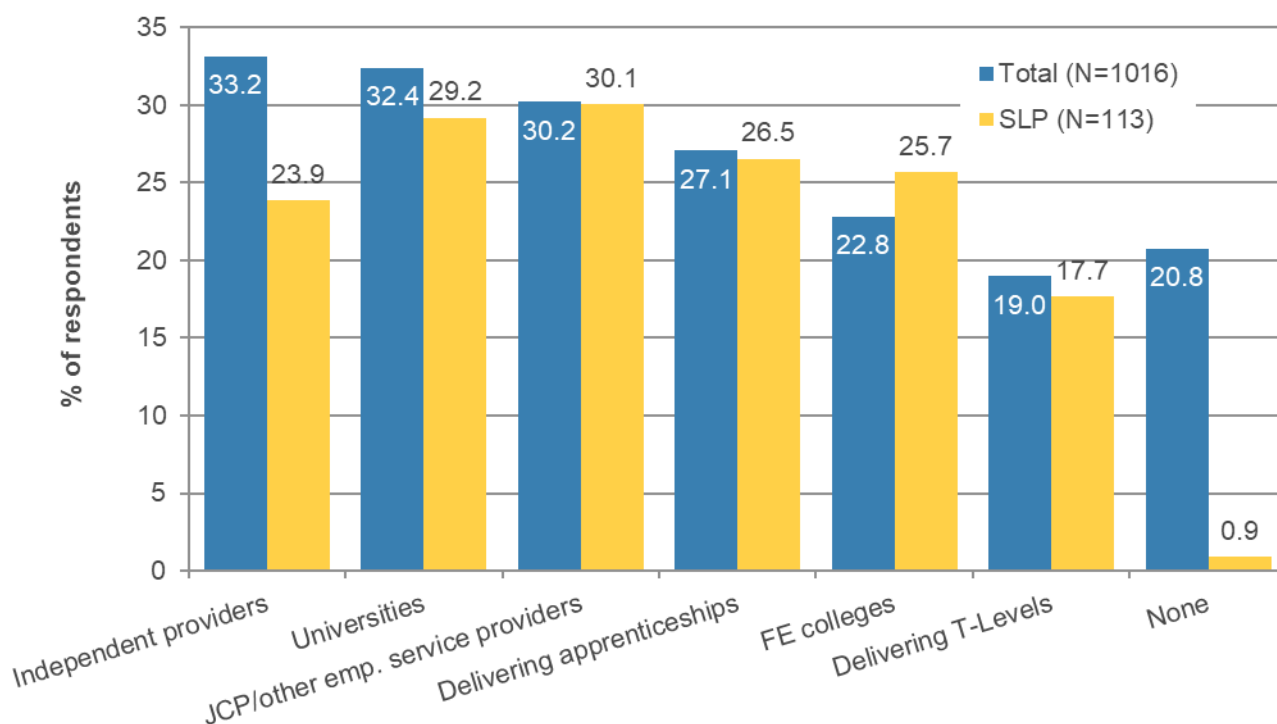


Source: *Survation survey, December 2022*

## 13.4 Engagement with training providers

### 13.4.1 Recent evidence at the organisation level

According to the **Survation survey**, SLP businesses' engagement with training providers was broadly similar to that of all businesses across London, as Figure 13.4 shows.

**Figure 13.4 Businesses' engagement with training providers, SLP and London, 2022**

Source: *Survation survey, December 2022*

SLP businesses were slightly less likely than businesses across London to be planning on increasing their investment in training over the coming year, with 24 per cent of SLP businesses saying it would increase significantly, compared with 29 per cent of businesses across London, and 35 per cent saying it will increase somewhat, compared with 40 per cent across London. Information and communication businesses were much more likely than average to be planning to increase their investment in training (40% planned to increase it significantly and 44% planned to increase it somewhat).

When businesses were asked which measures would help them to improve the skills of their workforce the most SLP businesses were less likely to mention courses that have been co-designed by employers and providers or government skills and employment programmes that are easy to understand. In health and social care, retail and hospitality, and construction businesses government skills and employment programmes which are easy to understand were more likely to be reported (50%, 45% and 40% respectively).

### 13.4.2 Evidence from 2019 at the establishment level

The **2019 ESS** results show that SLP establishments were as likely to provide off-the-job training for their staff as establishments across the whole of London (43.5% and 43.0% respectively) but less likely to have provided external training for staff (62.4% compared with 68.9% across London).

## 14 Health and social care

This chapter sets out the employment, recruitment and skills issues for the health and social care sector in SLP.

In addition to the sector-specific issues set out in the chapter, many of the cross-cutting skills themes identified in Chapter 2 may be relevant to the sector.

### 14.1.1 Employment in the health and social care

Table 14.1 shows the ten largest detailed occupations (4-digit SOC), with care workers and nursing assistants being the two largest groups, followed by nurses and medical practitioners making up most of the rest.

**Table 14.1 Largest occupations in the health and social care sector in SLP, 2021/22**

	Number	%
6135 Care workers and home carers	7,700	12.9
6131 Nursing auxiliaries and assistants	4,400	7.3
2237 Other nursing professionals	3,200	5.3
2211 Generalist medical practitioners	2,000	3.3
2212 Specialist medical practitioners	1,900	3.1
2461 Social workers	1,600	2.7
3229 Welfare and housing associate professionals n.e.c.	1,500	2.5
6111 Early education and childcare assistants	1,100	1.9
4159 Other administrative occupations n.e.c.	1,000	1.7
6136 Senior care workers	1,000	1.7

*Source: IES calculations from BRES 2021 and LFS 2022*

### 14.1.2 Current demand for occupations and skills

The largest occupations among health and social care vacancies in late January 2023 are shown in Table 14.2. Vacancies for care workers and home workers accounted for 42 per cent of all vacancies, with other nursing professionals, sports and leisure assistants, and fitness and wellbeing instructors being the next largest groups, together accounting for a further 14 per cent of vacancies.

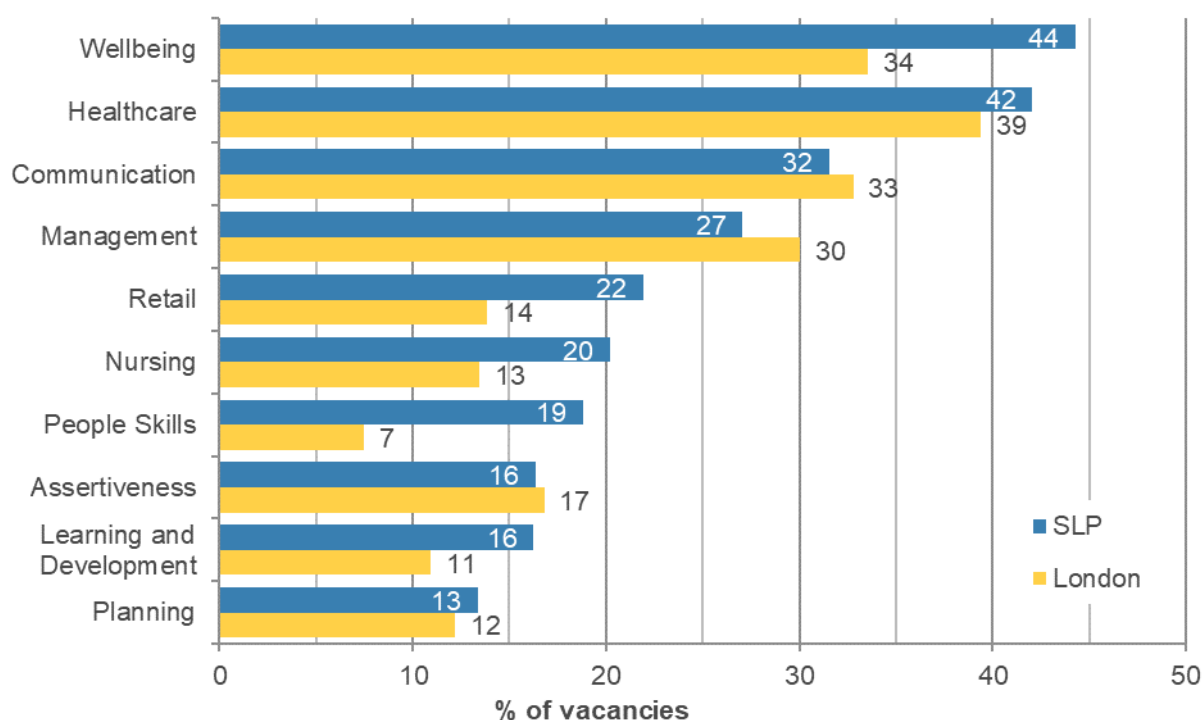
**Table 14.2 Largest occupations in health and social care vacancies in SLP, January 2023**

SOC	Occupation	% of all vacancies in sector
6135	Care workers and home workers	42
2237	Other nursing professionals	5
6211	Sports and leisure assistants	5
3433	Fitness and wellbeing instructors	4

Source: Adzuna vacancies snapshot, January 2023

Figure 14.1 shows the skills requested in health and social care vacancies in SLP areas, compared with health and social care vacancies across the whole of London, across 2022. Wellbeing and healthcare were the most commonly requested skills (as they were across London) while communication and management skills were marginally less likely to be requested in SLP areas. Other differences include that SLP vacancies were much more likely to mention skills in retail, nursing and people skills compared to all of London.

**Figure 14.1 Skills requested in health and social care vacancies, SLP and London, 2022**



Source: Adzuna vacancies dashboard, January-December 2022

### 14.1.3 Skills issues identified in the survey data

Data from the **Survation survey** from December 2022 showed that health and social care employers were much less likely to report struggling to fill vacancies (44% compared with 65% across all sectors).

The Employer Skills Survey 2019 found that establishments in health and social care experiencing skills shortages were much more likely than those in other sectors to report shortages obtaining computer literacy/basic IT skills from applicants (30.1% compared with 20.6% across all sectors) as well as complex problem solving skills (60.2% compared with 47.9%). In terms of soft skills, team working skills were difficult to obtain for establishments in health and social care (50.4% compared with 38.5% across all sectors), as were skills in managing or motivating other staff (44.3% compared with 36.4% across all sectors).

The various survey sources all reported that health and social care employers were more likely than others to have skills gaps, particularly for caring, leisure and other services staff, and administrative and clerical staff (ESS 2019). Basic IT skills were a particular gap in the sector (Survation, London Business 1000 surveys) along with writing instructions, guidelines, manuals or reports (ESS 2019), and there were gaps in a range of soft skills including making speeches or presentations, managing or motivating other staff, instructing, teaching or training people, team working and persuading or influencing others.

### 14.1.4 Skills issues identified in the consultations

Consultations confirmed high levels of vacancies in both the health sector and social care sector. This is a key employment sector in South London, particularly social care with Croydon and Sutton having the highest number of care homes in London. Stakeholders reported skills shortages for vacancies at all levels, from entry level roles such as support workers to high skilled direct patient care roles. As one stakeholder told us, all 350 roles needed to run a hospital are in high demand. Particular priorities in the care sector in SLP are frontline health care assistants (6135), care managers (1232, due to high turnover of staff, moving out of care), occupational and speech and language therapists (2222, 2223) and cooks (5435). Consultations also highlighted the need for administration and management roles, and Level 2 roles including childcare.

Consultations suggested that labour shortages were more of an issue for employers than skills gaps for the large number of unfilled entry level roles in social care, not least because of high levels of turnover, with research showing 40 per cent of new recruits leave the sector in the first year. As in the construction sector, employers were willing to provide skills training to staff who held good functional skills, especially English language and numeracy, employability skills, and attitude, although the proportion of new entrants without qualifications was high at 50 per cent. However, despite their willingness to take on staff without sector qualifications, and excellent training provision for health and social care in the region, social care employers struggle to attract applicants for vacancies due

to high competition for workers to fill entry level roles with sectors such as retail and hospitality. This is compounded by poor perceptions of the industry in terms of pay and conditions, and a lack of understanding of the varied roles provided by the sector. Low wages for entry level roles and support staff, and a lack of flexible working opportunities were identified by stakeholders as key issues when recruiting and retaining staff.

International recruitment and recruitment of migrant workers plays a key role in addressing labour shortages in the local health and social care industry; however this creates additional skills needs among staff including ESOL, an understanding of British culture (e.g. how to make a cup of tea), and conversions of international qualifications. Employers have also tried to address staffing issues by changing their approach to recruitment. This includes moving away from skills-based recruitment to values based processes, and working with local NHS training hubs to hold group recruitment events to publicise the industry and streamline application processes. However, given the high proportion of new entrants without qualifications, expansion of training provision in the sector is also important.

As well as issues with recruitment, the health and social care sector also struggles to retain staff, with high turnover in the sector again likely relating to pay and conditions in the sector. Supporting staff progression through learning and development was identified as a key means of addressing retention issues, as it allows employees to progress to higher salary bands. This involves employers developing training plans and engaging in learning and development for staff. In particular employers highlighted training in business skills, finance, marketing and recruitment as skills needed to progress employees to management roles.

The sector also faces issues with skills gaps among their existing workforce. These skills gaps primarily relate to the use of IT, and are projected to grow over the next few years as new technologies are introduced to the sector. The increasing use of digital referral pathways generates a need for basic IT skills from staff. Consultations also suggested that there is an emerging skills gap for expertise in IT systems used in health and care, currently the number of experts in these technologies is low creating high demand. Health and social care is also increasingly utilising new technologies will create further skills gaps and shortages to be addressed over the next decade. This includes a push for digital care planning and medical administration, and the digitalisation of care homes (use of voice activated technology, AI pain check technology, acoustic monitoring). This will require behaviour change on the part of workers and upskilling of an aging workforce who may lack digital skills. Managers who will be most in need of these digital skills in particular have a fairly high average age. There were also gaps in business management skills for supervisor and managers, but there is a lack of free Level 4 provision to address this gap.

Employers in health and social care frequently support training for their staff, particularly through apprenticeships and diplomas, to support retention and progression, and address skills gaps. However due to labour shortages in the sector the investment in time to release staff for training acts as a major barrier to accessing training. For example, employers reported good provision of IT training locally but often were not able to release



staff to attend this. Workforce is a priority for the South West London Integrated Care Board.

## 15 Construction and the built environment

This chapter sets out the employment, recruitment and skills issues for the construction and built environment sector in SLP.

In addition to the sector-specific issues set out in the chapter, many of the cross-cutting skills themes identified in Chapter 3 may be relevant to the sector, particularly green skills.

### 15.1.1 Employment in construction and the built environment

Table 15.1 shows the ten largest detailed occupations (4-digit SOC), with construction trades making up the top five (26% of total employment), and managerial and professional occupations also featuring among the rest of the top ten along with elementary construction workers and administrative occupations.

**Table 15.1 Largest occupations in the construction/built environment sector in SLP, 2021/22**

	Number	%
5316 Carpenters and joiners	1,900	6.0
5241 Electricians and electrical fitters	1,800	5.9
5315 Plumbers & heating and ventilating installers and repairers	1,700	5.4
5319 Construction and building trades n.e.c.	1,600	5.3
5323 Painters and decorators	1,000	3.3
1122 Production managers and directors in construction	1,000	3.2
9129 Elementary construction occupations n.e.c.	700	2.4
4159 Other administrative occupations n.e.c.	600	2.0
2129 Engineering professionals n.e.c.	600	1.9
2121 Civil engineers	600	1.9

Source: IES calculations from BRES 2021 and LFS 2022

### Employment projections

In construction and the built environment, the construction sub-sectors are projected to grow rapidly, by 27%, and all occupational groups in the construction sub-sectors are projected to increase in size, although employment in the largest occupational group,

skilled trades occupations, is projected to increase by 21%, below the overall increase, and the fastest growth is projected for professional and elementary occupations.

Employment in architectural and engineering activities is projected to remain stable, with the number of professional workers projected to increase, by 7%, but there are projected decreases for associate professional/technical workers (1.7% decrease) and managerial occupations (8.0% decrease);

### 15.1.2 Current demand for occupations and skills

The number of construction sector vacancies in South London in the Adzuna data was too small to undertake analysis on for key occupations and skills. However, the construction labour analysis research undertaken for SLP<sup>11</sup> identified the following occupations as high priority in terms of current occupational pressures:

- Scaffolders
- Steel erectors/structural
- Civil engineering operatives nec
- Wood trades and interior fit-out
- Electrical trades and installation

### 15.1.3 Skills issues identified in the survey data

The Suration survey findings from December 2022 showed that construction employers were less likely to have vacancies than other employers (73% had vacancies compared with 79% across all sectors) and were more likely to be struggling to fill them (75% of construction sector employers with vacancies compared with the average across all sectors of 65%).

In terms of roles that were difficult to fill, employers in construction were more likely than those in other sectors to report struggling to fill vacancies for skilled trades roles (57% of construction employers with recruitment difficulties mentioned these roles compared with 30% across all sectors) and managerial roles (43% compared with 35% across all sectors).

More than two thirds of construction employers struggling to fill vacancies (69%) said that low numbers of applicants with required skills was driving their difficulties, substantially above the proportion of employers across all sectors (57%). Thus 38 per cent of all

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<sup>11</sup> Assessing the needs for traditional and low carbon construction skills in support of the work carried out by South London Partnership, March 2023

construction employers in London had skills shortages, compared with 29 per cent across all sectors.

The **London Business 1000 survey** found that construction sector employers were more likely than average to report that skills shortages among job applicants as a main skills and labour market challenge for their business (27.5% compared with 24.6% across all sectors).

The **ESS 2019** found that construction sector establishments had particular shortages obtaining manual dexterity skills from applicants (41.0% compared with 22.3% across all sectors) and also reading and understanding instructions, guidelines, manuals or reports (53.4% compared with 39.7% across all sectors), customer handling skills (57.4% compared with 42.4% across all sectors) and setting objectives for others and planning human, financial and other resources (37.1% compared with 30.4% across all sectors).

Construction was less affected by skills gaps than other sectors – the Survation survey found that 27 per cent of construction employers reported skills gaps compared with 34 per cent across all sectors, and the ESS 2019 found that eight per cent of establishments had skills gaps compared with 11 per cent across all sectors. Gaps were commonly found among skilled trades and professional occupations, relating to basic and advanced IT skills, basic and advanced numeracy/statistical skills, manual dexterity skills, complex problem solving skills, and green skills.

In terms of the skills that construction business think they would need over the next two to five years, they were more likely than average to report sector specific technical skills, and basic digital skills.

### **15.1.4 Skills issues identified in the consultations**

Consultations confirmed that the construction sector in South London is both a major employment sector with many vacancies, and a sector struggling to fill these vacancies due to skills shortages. High demand for construction work locally produces vacancies that employers are currently struggling to fill due to both labour and skills shortages. Stakeholders reported skills gaps at all levels and roles in the sector, with a particular need for skills training around trades, scaffolding, ground working and labouring to meet local demand. Scaffolding in particular is in high demand in the area with an aging workforce and little training provision for this – it was mentioned that there is no scaffolding training provision between Leytonstone (in east London) and Littlehampton (on the south coast).

Construction employers discussed a need for both level 1 and 2 training to get people into the industry, and then upskilling of the workforce to build a solid foundation of construction workers with a pipeline into higher skilled roles. However the nature of the construction industry, and especially use of s106 monies, leads to short term projects making it harder to retain and upskill workers.

Funded CSCS card training was highlighted as a key training need to meet this demand for construction workers, as this is an essential qualification for working on site. High demand for this was projected from 2024 when the 'Grandfather Rights' scheme ends and contractors will be required to demonstrate technical competence through the attainment of technical qualifications, meaning that 60,000 people may lose their CSCS card. Employers also discussed the need for workers with good core employability skills, expressing a willingness to provide skills training if employees have a good work ethic, communication skills and on-site behaviours such as punctuality.

Stakeholders also highlighted the need for retraining and upskilling in the construction industry to fill higher level roles. This was particularly related to the projected demand for green skills which requires those working in construction currently to gain new competencies around retrofitting and green technologies such as low carbon boilers and electric vehicle infrastructure.

Consultations highlighted that construction employers will benefit from increased construction skills training beyond filling vacancies. Up/reskilling existing employees and supporting skills development to fill gaps will lead to employers diversifying their offer while ensuring competency and internal skills transfers.

## 16 Information and communication

This chapter sets out the employment, recruitment and skills issues for the information and communication sector in SLP.

In addition to the sector-specific issues set out in the chapter, many of the cross-cutting skills themes identified in Chapter 2 may be relevant to the sector, particularly digital skills.

### 16.1.1 Employment in information and communication

Table 16.1 shows the ten largest detailed occupations (4-digit SOC). Programmers and software developers were the largest occupation and accounted for nearly one in five workers (18.5%) and the next three largest occupations were all information technology professionals, while the publishing and film/TV sectors were reflected in arts officer, producers and directors, and journalists and reporters being in the top ten.

**Table 16.1 Largest occupations in the information and communication sector in SLP, 2021/22**

	Number	%
2134 Programmers and software development professionals	3,700	18.5
2139 Information technology professionals n.e.c.	1,100	5.4
2132 IT managers	900	4.7
2133 IT business analysts, architects and systems designers	900	4.3
3416 Arts officers, producers and directors	700	3.7
1137 Information technology directors	700	3.3
3132 IT user support technicians	500	2.6
3556 Sales accounts and business development managers	500	2.5
2492 Newspaper and periodical journalists and reporters	400	2.0
2440 Business and financial project management professionals	400	1.9

Source: IES calculations from BRES 2021 and LFS 2022

### 16.1.2 Current demand for occupations and skills

The number of information and communication sector vacancies in South London in the Adzuna data was too small to undertake analysis on for key occupations and skills. However, looking at vacancies in the information and communication sector across London, the most commonly mentioned skills were:

- Communication (mentioned in 48% of vacancies)
- Solutions (48%)
- Data (41%)
- Clients (34%)
- Management (34%)

### 16.1.3 Skills issues identified in the survey data

Employers in the information and communication sector were more likely than those in other sectors to have had vacancies in December 2022 according to the [Survation survey](#), with 90 per cent having vacancies compared with 79 per cent across all sectors. They were also more likely to report struggling to fill vacancies (76% of those with vacancies compared with 65% across all sectors), particularly for technical and skilled support roles (53% of information and communication employers struggling to fill vacancies compared with 43% across all sectors).

Just under half (48%) of those struggling to fill vacancies reported that this was caused by low numbers of suitable applicants with the required skills, below the proportion across all sectors of 57 per cent. However, the high proportions with vacancies, and with difficulties filling them, mean that the proportion of all information and communication employers with skills shortages was, at 33 per cent, above the figure for all sectors of 29 per cent.

The 2019 ESS found particular issues for information and communication establishments obtaining the following technical/practical skills:

- Advanced or specialist IT skills (57.8% of information and communication sector establishments compared with 19.2% across all sectors);
- Computer literacy/basic IT skills (30.3% compared with 20.6%);
- Solving complex problems requiring a solution specific to the situation (72.4% compared with 47.9% across all sectors); and
- Complex numerical or statistical skills and understanding (45.7% compared with 29.9% across all sectors).

Information and communication establishments were also much more likely than those in other sectors to report shortages obtaining the soft skill of setting objectives for others and planning human, financial and other resources (46.4% compared with 30.4% across all sectors).

Information and communication employers were less likely to report skills gaps than those in other sectors in both the London Business 1000 survey and the ESS 2019. The gaps that were experienced were commonly among professional and associate professional/technical roles, with advanced or specialist IT skills the main skill lacking among existing staff, but also oral soft skills – making speeches or presentations.

Information and communication employers were more likely than average to report needing basic and advanced IT skills, and maths and English skills, over the next two to five years.

#### **16.1.4 Skills issues identified in the consultations**

The information and communications sector were underrepresented in consultations. Stakeholders suggested that the key skills need in the sector related to higher level skills such as programmers, and a projected demand for skills around new AI technologies over the next decade.



## 17 Hospitality and retail

This chapter sets out the employment, recruitment and skills issues for the hospitality and retail sector in SLP.

In addition to the sector-specific issues set out in the chapter, many of the cross-cutting skills themes identified in Chapter 2 may be relevant to the sector.

### 17.1.1 Hospitality and retail

Table 17.1 shows the ten largest detailed occupations (4-digit SOC). Sales and retail assistants account for one in seven employees (14%), followed by kitchen and catering assistants (6.5%) and waiters and waitresses (5.3%). Managers in retail account for 4.2 per cent, and restaurant/catering managers in hospitality account for 2.3 per cent.

**Table 17.1 Largest occupations in the hospitality and retail sector in SLP, 2021/22**

	Number	%
7111 Sales and retail assistants	13,700	13.9
9263 Kitchen and catering assistants	6,400	6.5
9264 Waiters and waitresses	5,200	5.3
1150 Managers and directors in retail and wholesale	4,100	4.2
7112 Retail cashiers and check-out operators	4,000	4.0
5434 Chefs	3,500	3.5
9265 Bar staff	3,200	3.2
9252 Warehouse operatives	3,100	3.1
7132 Sales supervisors - retail and wholesale	2,600	2.6
1222 Restaurant and catering establishment managers and proprietors	2,300	2.3

Source: IES calculations from BRES 2021 and LFS 2022

### 17.1.2 Current demand for occupations and skills

Table 17.2 shows that chefs and customer service supervisors were the largest occupations among hospitality and retail vacancies in SLP in January 2023, each accounting for 10 per cent of all vacancies in the sector. Delivery drivers and couriers,

business, research and administrative professionals, and kitchen and catering assistance were also common occupations, together comprising a further 22 per cent of vacancies.

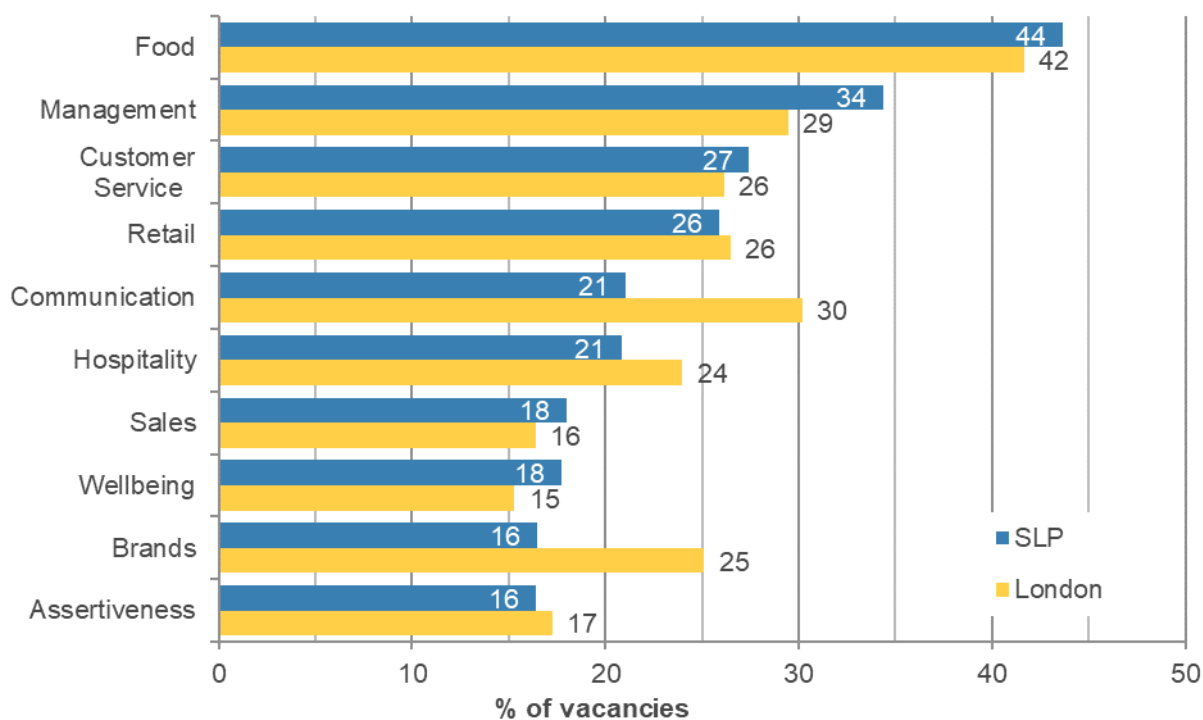
**Table 17.2 Largest occupations in hospitality and retail vacancies in SLP, January 2023**

SOC	Occupation	% of all vacancies in sector
5434	Chefs	10
7220	Customer service supervisors	10
8214	Delivery drivers and couriers	9
2439	Business, research and administrative professionals n.e.c.	7
9263	Kitchen and catering assistants	6

Source: Adzuna vacancies snapshot, January 2023

Food skills were the most requested in retail and hospitality vacancies in 2022, featuring in 44 per cent of vacancies in SLP areas and 42 per cent in London. While management skills were more likely to be requested in SLP areas (34 per cent of hospitality and retail vacancies in SLP compared to 29 per cent in London), communication and brand skills were considerably more prominent in vacancies across London as a whole – 30 per cent in all of London versus 21 per cent in SLP for the former, 25 per cent in all of London versus 16 per cent in SLP for the latter.

**Figure 17.1 Skills requested in hospitality and retail vacancies, SLP and London, 2022**



Source: Adzuna vacancies dashboard, January-December 2022

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### 17.1.3 Skills issues identified in the survey data

Data from the **Survation survey** from December 2022 showed that hospitality and retail employers were less likely than those in other sectors to have vacancies (73% compared with 79% across all sectors) and were also less likely to have 'many' vacancies and more likely to have 'few'. They were more likely however to be struggling to fill vacancies, with 77 per cent of employers with vacancies saying that they were struggling to fill some of them compared with the figure across all sectors of 65 per cent. In terms of roles that were difficult to fill, hospitality and retail employers were more likely than average to report that sales and customer service roles were hard to fill (34% of those struggling to fill vacancies compared with 26% of all employers).

Although the proportion of hospitality and retail employers who were struggling to fill vacancies who said that this was caused by low numbers of applicants with the required skills was similar to the figure for all sectors (59% and 57% respectively), the proportion of all hospitality and retail employers with skills shortages was above the overall proportion (33% compared with 29%) because of the high proportion that were struggling to fill vacancies.

Foreign language skills and manual dexterity skills were particular shortages for hospitality and retail sector establishments according to the ESS 2019, along with the soft skills of instructing, teaching or training people, sales skills, customer handling skills and managing own feelings, or handling the feelings of others.

Hospitality and retail employers were more likely than those in other sectors to have skills gaps (London Business 1000 survey and ESS 2019), with gaps most commonly among sales and customer service staff, and elementary staff, and related to customer service and sales skills, and foreign language skills.

Thinking about the skills most in need in the next two to five years, hospitality and retail employers were more likely than average to report needing advanced digital skills, basic maths skills, and cross-cutting transferable skills such as negotiation and resilience.

### 17.1.4 Skills issues identified in the consultations

Labour shortages were reported as being a bigger issue for retail and hospitality employers than skills gaps, with employers facing high competition from other sectors for workers to perform entry level roles. Transferable skills including functional skills and core employability skills were the main gap reported by employers who can struggle to find workers with the English language, numeracy and basic IT skills needed to fulfil their roles, as well as a lack of work readiness among applicants.

## 18 Education

This chapter sets out the employment, recruitment and skills issues for the education sector in SLP.

In addition to the sector-specific issues set out in the chapter, many of the cross-cutting skills themes identified in Chapter 2 may be relevant to the sector.

### 18.1.1 Education

The largest occupational group was professional occupations, accounting for nearly three fifths (58%) of workers, while caring, leisure and other service occupations (14%) and associate professional and technical occupations (13%) were the next largest groups.

Table 18.1 shows the fifteen largest detailed occupations (4-digit SOC), and shows that these are all education professional, technical or assistant roles.

**Table 18.1 Largest occupations in the education sector in SLP, 2021/22**

	Number	%
2314 Primary education teaching professionals	6,400	14.1
2313 Secondary education teaching professionals	4,900	10.9
2319 Teaching professionals n.e.c.	3,600	7.9
3231 Higher level teaching assistants	2,900	6.4
6112 Teaching assistants	2,600	5.7
6113 Educational support assistants	2,100	4.6
2311 Higher education teaching professionals	1,500	3.3
2316 Special needs education teaching professionals	1,500	3.2
9232 School midday and crossing patrol occupations	900	2.0
4213 School secretaries	800	1.7
9263 Kitchen and catering assistants	700	1.6
6111 Early education and childcare assistants	600	1.4
3432 Sports coaches, instructors and officials	600	1.3
2321 Head teachers and principals	600	1.2
2312 Further education teaching professionals	600	1.2

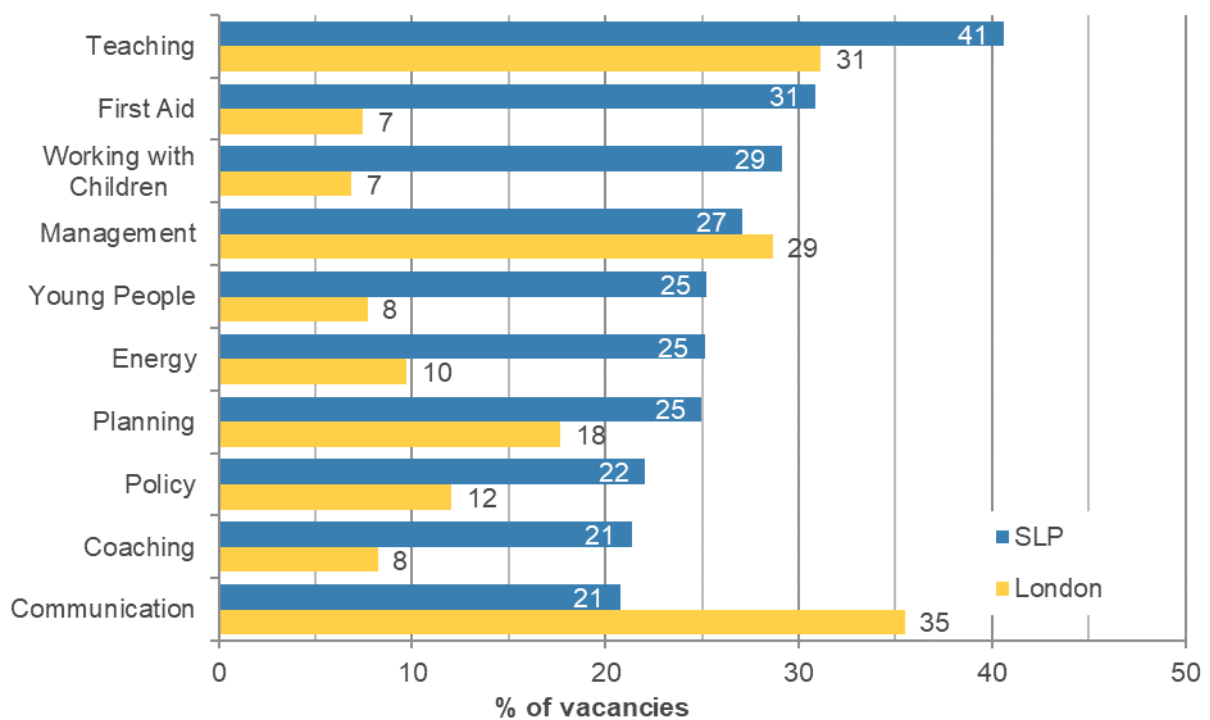
Source: IES calculations from BRES 2021 and LFS 2022

### 18.1.2 Current demand for occupations and skills

Looking at the most common occupations among education vacancies in SLP in January 2023, there was a high level of demand for driving instructors including HGV which may reflect a particular recruitment campaign, while other vacancies were for early education and childcare workers at all levels – assistants, practitioners and managers – and teaching professionals.

Figure 18.1 shows the skills requested in education vacancies in SLP compared with those in the whole of London. Unsurprisingly, teaching is the skill most likely to be requested (41 per cent), and is demanded more often than in education vacancies in all of London (31 per cent). Several other skills, including first aid, working with children, young people, energy and coaching are demanded much more amongst SLP education vacancies than across London – this is likely due to education industry employers hiring in SLP being more focussed on education at the earlier stages (Camp Beaumont Day Camps, Harris federation, Busy Bees Nurseries, SuperCamps, Explore Learning and Scotts Primary School are amongst the top ten employers) whereas across the top hiring employers in the education industry includes more of those in higher education (such as Imperial College, University of the Arts London and London Business School).

**Figure 18.1 Skills requested in education vacancies, SLP and London, 2022**



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Source: Adzuna vacancies dashboard, January-December 2022

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### 18.1.3 Skills issues identified in the survey data

Education employers were slightly less likely to have had vacancies in December 2022 than employers across all sectors (76% and 79% respectively) according to the **Survation survey**. The proportion of those with vacancies who were struggling to fill them was close to the proportion across all sectors, although they were more likely to struggle to fill vacancies for managerial roles (42% of those struggling to fill vacancies compared with 35% across all sectors).

The ESS 2019 found that education establishments with skills shortages were more likely than other establishments to report particular issues with adapting to new equipment or materials in the education sector (38.1% reported shortages compared with 28.0% of establishments across all sectors) as well as writing instructions, guidelines, manuals or reports (44.5% compared with 33.3%), and on the soft skills side managing workers' own feelings, or handling the feelings of others was an issue in the education sector (43.1% compared with 37.0%).

Skills gaps were more prevalent among education employers than those in other sectors – ESS 2019 found that 16.5% of education establishments had skills gaps compared with 11.0% across all sectors. Nearly two thirds of establishments with skills gaps (63%) reported gaps among caring, leisure and other services staff, and gaps were also commonly reported among professional staff. In terms of the skills lacking, these were commonly basic IT skills, maths and English skills, and also team working skills and managing own feelings or handling the feelings of others.

Education employers were more likely than those in other sectors to report that sector-specific technical skills and basic maths skills were those they needed most over the next two to five years.

## 19 Data tables – employment characteristics

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This chapter sets out more detail on employment characteristics within the SLP sub-regional partnership, drawing on data from the Business Register and Employment Survey (BRES) for 2021, and changes since 2015, and the Labour Force Survey (LFS) for 2022.

### 19.1 Employment by sector

Note: the raw BRES data contain an anomalous result for employment in the private security activities industry sub-class (SIC 80100) in the Sutton 012D Lower-layer Super Output Area in 2021, showing 10,000 employees compared with 800 in 2020. This is likely due to payroll activities for employees working elsewhere being carried out at the site in Sutton. This figure has been replaced by the average figure across 2015 to 2020, of 1,500 (still above the 2020 figure).

**Table 19.1 Employees in employment by sector, 2021**

	SLP number	SLP %	London %	GB %
Agriculture/mining	200	0.0	0.1	0.9
Manufacturing	8,600	2.0	2.1	7.6
Electricity, gas, water	2,500	0.6	0.7	1.2
Construction	22,700	5.3	3.5	4.9
Wholesale/retail	66,100	15.5	11.4	14.4
Transport/storage	18,100	4.2	4.3	5.0
Accommodation/food	32,800	7.7	7.4	7.5
Information & comms	20,000	4.7	8.4	4.4
Financial services	10,100	2.4	8.0	3.6
Real estate activities	8,600	2.0	2.5	1.8
Professional services	42,400	9.9	14.2	8.9
Admin/support servs	38,800	9.1	9.7	8.9
Public administration	21,500	5.0	4.6	4.6
Education	45,300	10.6	7.3	8.7
Health & social care	60,000	14.1	10.6	13.6
Arts, ent, recreation	16,000	3.7	2.8	2.3
Other services	12,500	2.9	2.5	1.9
All sectors	426,100	100	100	100

Source: Business Register and Employment Survey, 2021

**Table 19.2 Change in employees in employment by sector, 2015-2021**

	SLP		London		GB	
	2015	2021	Change	% change	% change	% change
Agriculture/mining	200	200	0	-12.5	-11.1	-3.3
Manufacturing	10,000	8,600	-1,400	-14.1	-3.5	-2.5
Electricity, gas, water	1,900	2,500	600	31.9	54.2	12.5
Construction	16,500	22,700	6,200	37.7	34.0	13.1
Wholesale/retail	72,600	66,100	-6,500	-8.9	-1.8	-2.9
Transport/storage	16,200	18,100	1,900	11.5	1.3	15.5
Accommodation/food	26,800	32,800	6,000	22.3	5.3	10.0
Information & comms	23,400	20,000	-3,400	-14.4	16.7	13.4
Financial services	10,100	10,100	0	0.1	20.1	6.7
Real estate activities	9,700	8,600	-1,000	-10.7	2.3	13.3
Professional services	42,700	42,400	-300	-0.8	13.8	12.1
Admin/support servs	55,200	38,800	-16,400	-29.7	-1.9	5.4



	SLP				London	GB
	2015	2021	Change	% change	% change	% change
Public administration	17,800	21,500	3,800	21.1	14.3	10.9
Education	44,800	45,300	500	1.1	0.0	1.5
Health & social care	53,600	60,000	6,500	12.1	12.1	8.8
Arts, ent, recreation	15,700	16,000	300	1.8	15.5	1.3
Other services	10,800	12,500	1,700	15.8	12.9	-4.1
N=	427,800	426,100	-1,700	-0.4	8.4	5.7

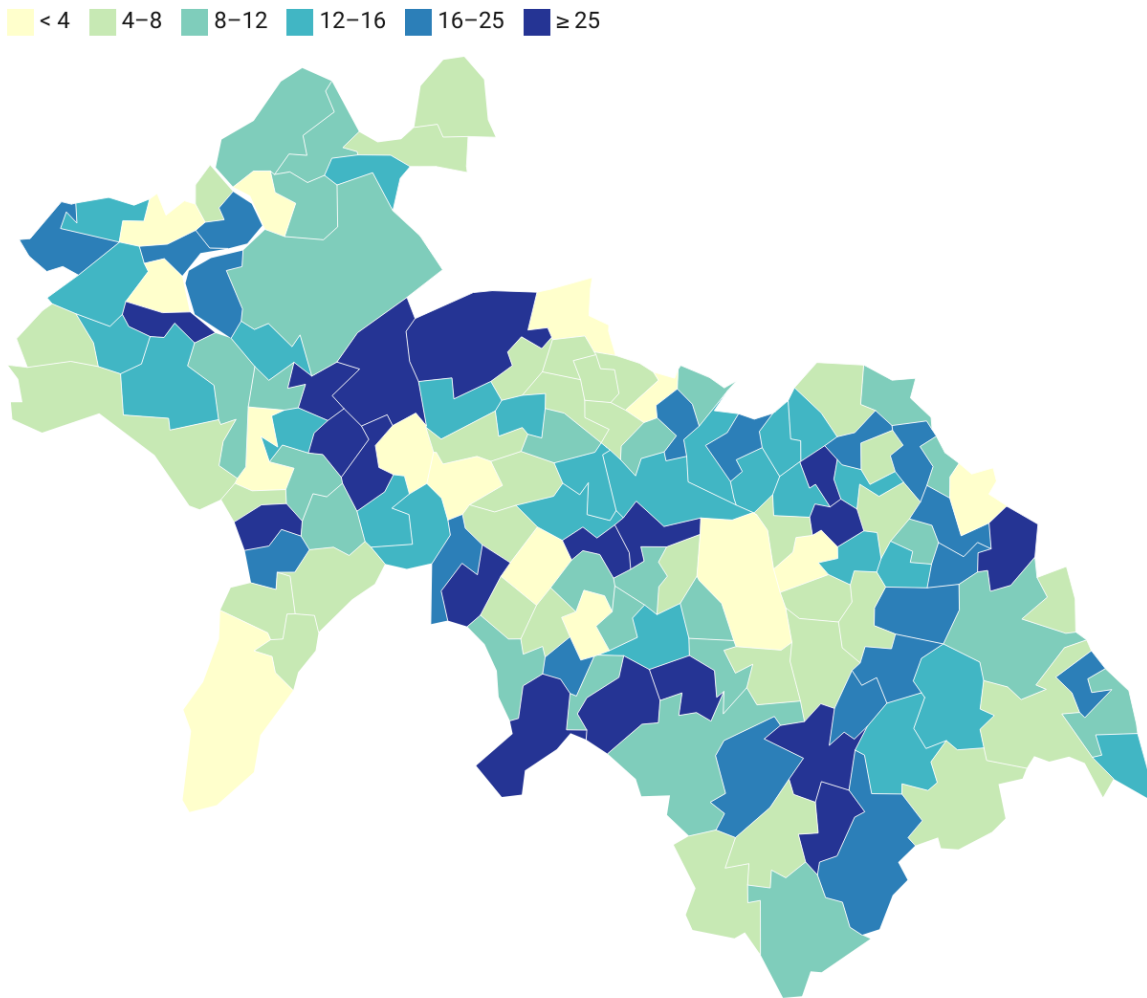
Source: Business Register and Employment Survey, 2015-2021

**Table 19.3 Employees in employment by priority sector, 2021**

	Croydon	Kingston upon Thames	Merton	Richmond upon Thames	Sutton
Health and social care	13.5	19.4	9.5	11.1	18.1
Construction and built environment	8.9	5.3	6.7	5.8	9.0
Information and communication	3.6	4.5	5.1	7.6	3.1
Hospitality and retail	23.4	24.6	25.5	21.6	20.7
Education	9.6	12.8	9.5	12.2	9.8
All priority sectors	58.9	66.6	56.4	58.3	60.7
N=	120,700	72,100	80,800	79,000	82,000

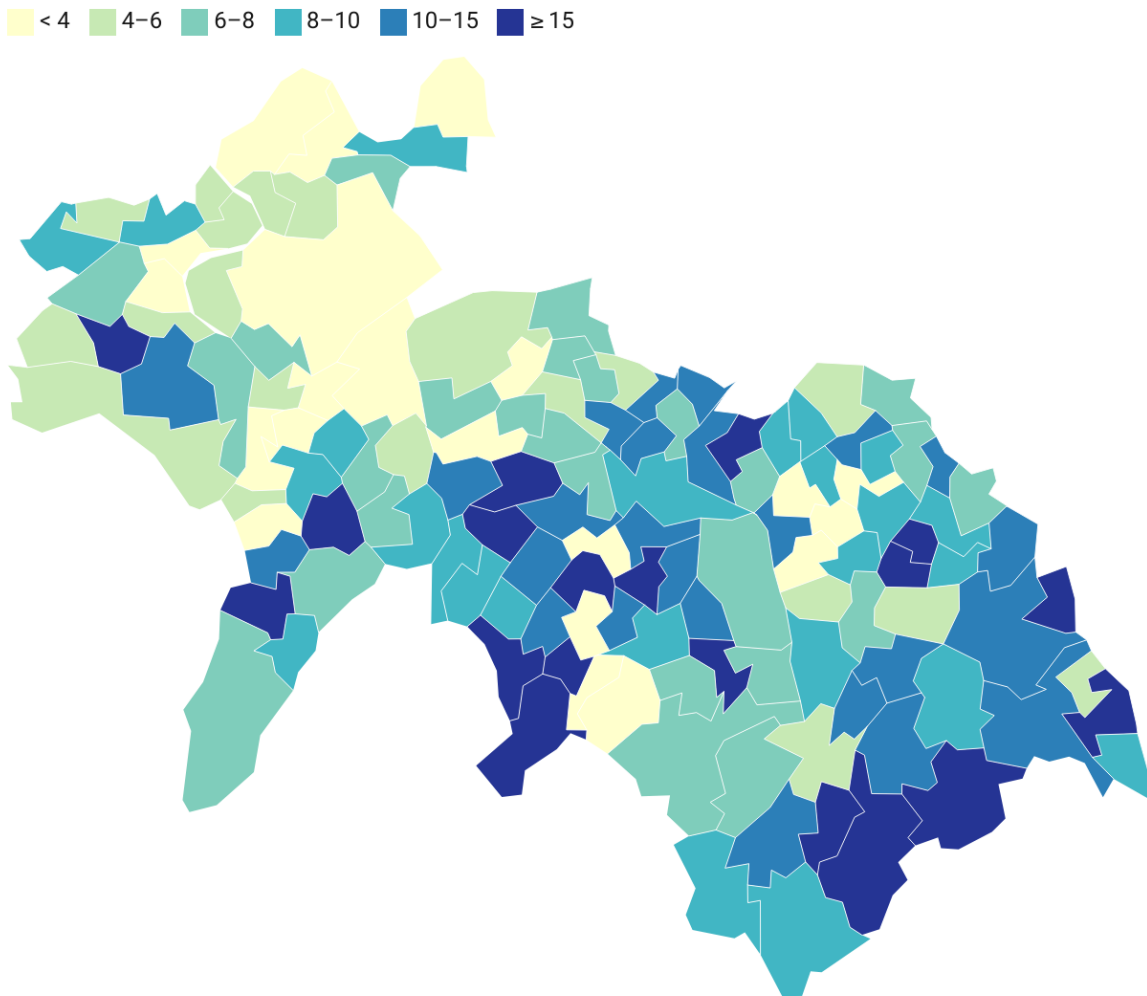
Source: Business Register and Employment Survey, 2021

**Figure 19.1 Proportion of employment in health and social care**



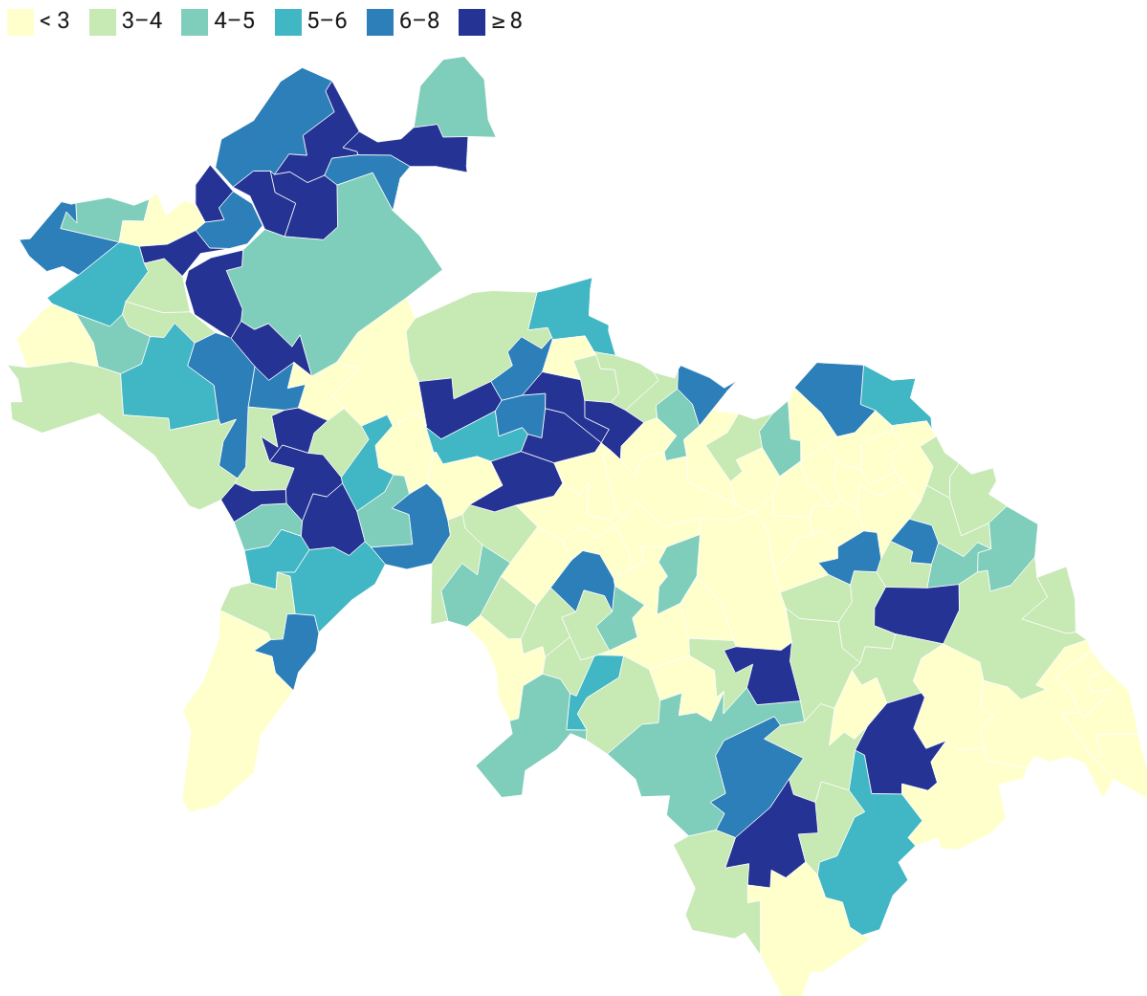
Map data: © Crown copyright and database right 2020 • Created with Datawrapper

**Figure 19.2 Proportion of employment in construction and built environment**



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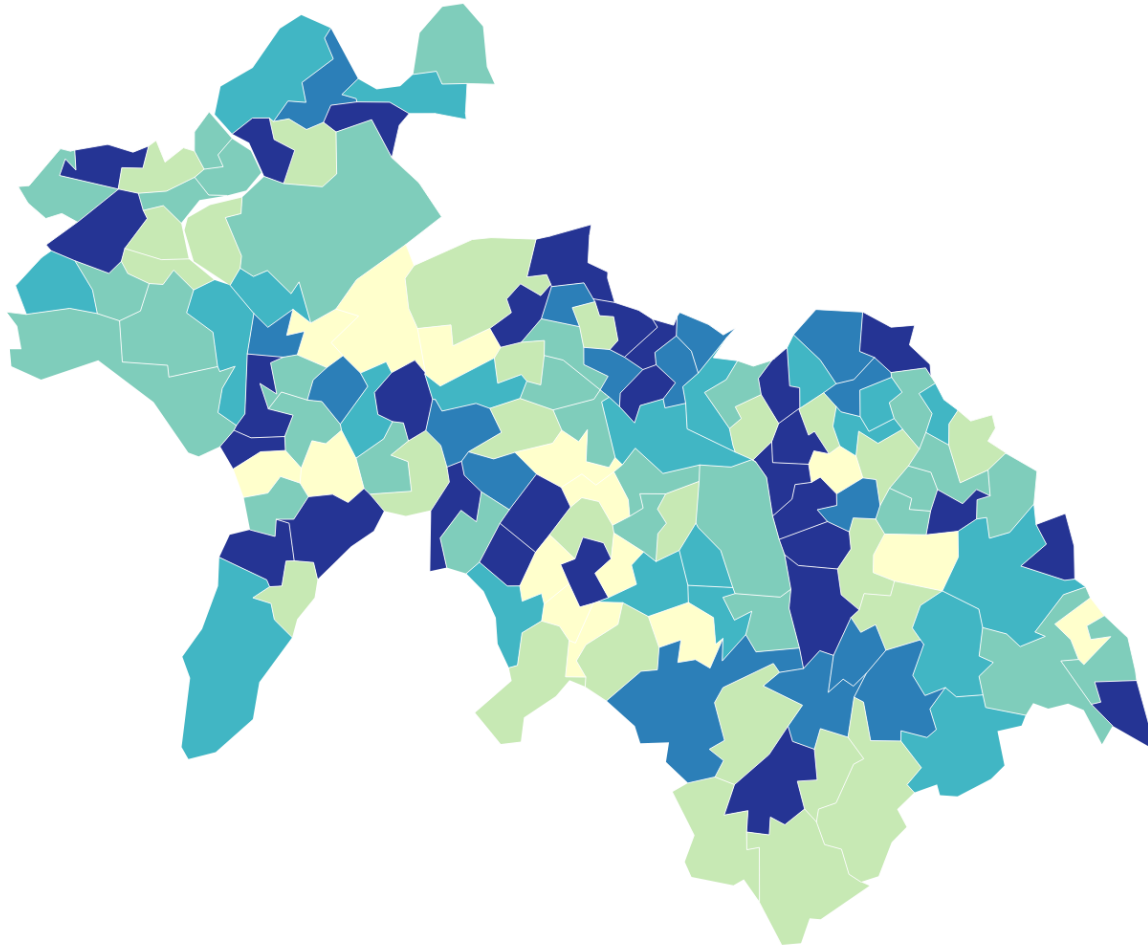
**Figure 19.3 Proportion of employment in information and communication**



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**Figure 199.4 Proportion of employment in retail and hospitality**

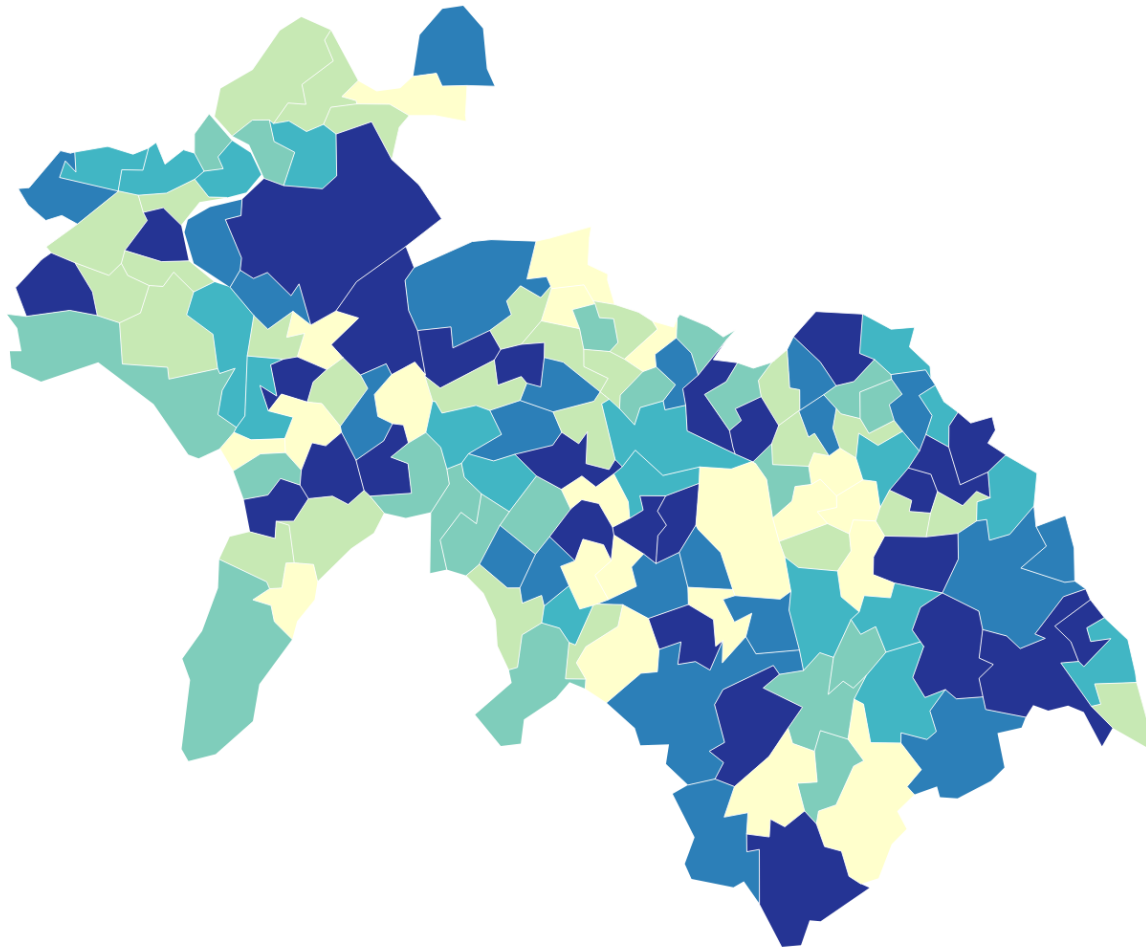
■ < 10   ■ 10-15   ■ 15-20   ■ 20-25   ■ 25-30   ■ ≥ 30



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**Figure 199.5 Proportion of employment in education**

■ < 4   ■ 4-8   ■ 8-12   ■ 12-16   ■ 16-25   ■ ≥ 25



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### 19.1.1 Employment by occupation within priority sectors

**Table 19.4 Employment by occupation in SLP priority sectors, 2022**

	Health & social care	Construction & built environment	Information & communication	Hospitality & retail	Education	All sectors
Managers, directors and senior officials	8.1	13.7	12.6	11.6	3.4	11.7
Professional occupations	42.1	22.8	57.7	6.8	58.3	33.6
Associate professional occupations	9.0	14.4	19.3	9.8	12.5	15.0
Administrative and secretarial occupations	8.1	8.5	5.4	8.6	6.5	10.4
Skilled trades occupations	1.2	31.5	2.6	12.5	0.1	6.4
Caring, leisure and other service occupations	28.8	0.9	0.0	1.1	14.2	8.4
Sales and customer service occupations	0.4	0.6	1.7	24.7	0.2	4.9
Process, plant and machine operatives	0.2	4.9	0.6	6.5	1.2	3.8
Elementary occupations	2.1	2.7	0.1	18.5	3.5	5.9

Note: Data are for whole of Outer London as this is the lowest geographical area for SLP in the Labour Force Survey

Source: Labour Force Survey, 2022, 4-quarter average

**Table 19.5 Employment by occupation in health and social care, SLP, 2021/22**

	<b>Number</b>	<b>%</b>
6135 Care workers and home carers	7,700	12.9
6131 Nursing auxiliaries and assistants	4,400	7.3
2237 Other nursing professionals	3,200	5.3
2211 Generalist medical practitioners	2,000	3.3
2212 Specialist medical practitioners	1,900	3.1
2461 Social workers	1,600	2.7
3229 Welfare and housing associate professionals n.e.c.	1,500	2.5
6111 Early education and childcare assistants	1,100	1.9
4159 Other administrative occupations n.e.c.	1,000	1.7
6136 Senior care workers	1,000	1.7

*Source: IES calculations from Labour Force Survey, 2022, 4-quarter average and BRES 2021 data*



**Table 199.6 Employment by occupation in construction and the built environment, SLP, 2021/22**

	Number	%
5316 Carpenters and joiners	1,900	6.0
5241 Electricians and electrical fitters	1,800	5.9
5315 Plumbers & heating and ventilating installers and repairers	1,700	5.4
5319 Construction and building trades n.e.c.	1,600	5.3
5323 Painters and decorators	1,000	3.3
1122 Production managers and directors in construction	1,000	3.2
9129 Elementary construction occupations n.e.c.	700	2.4
4159 Other administrative occupations n.e.c.	600	2.0
2129 Engineering professionals n.e.c.	600	1.9
2121 Civil engineers	600	1.9

*Source: IES calculations from Labour Force Survey, 2022, 4-quarter average and BRES 2021 data*

**Table 199.7 Employment by occupation in information and communication, SLP, 2021/22**

	Number	%
2134 Programmers and software development professionals	3,700	18.5
2139 Information technology professionals n.e.c.	1,100	5.4
2132 IT managers	900	4.7
2133 IT business analysts, architects and systems designers	900	4.3
3416 Arts officers, producers and directors	700	3.7
1137 Information technology directors	700	3.3
3132 IT user support technicians	500	2.6
3556 Sales accounts and business development managers	500	2.5
2492 Newspaper and periodical journalists and reporters	400	2.0
2440 Business and financial project management professionals	400	1.9

*Source: IES calculations from Labour Force Survey, 2022, 4-quarter average and BRES 2021 data*

**Table 19.8 Employment by occupation in hospitality and retail, SLP, 2022**

	Number	%
7111 Sales and retail assistants	13,700	13.9
9263 Kitchen and catering assistants	6,400	6.5
9264 Waiters and waitresses	5,200	5.3
1150 Managers and directors in retail and wholesale	4,100	4.2
7112 Retail cashiers and check-out operators	4,000	4.0
5434 Chefs	3,500	3.5
9265 Bar staff	3,200	3.2
9252 Warehouse operatives	3,100	3.1
7132 Sales supervisors - retail and wholesale	2,600	2.6
1222 Restaurant and catering establishment managers and proprietors	2,300	2.3

*Source: IES calculations from Labour Force Survey, 2022, 4-quarter average and BRES 2021 data*

**Table 19.9 Employment by occupation in education, SLP, 2022**

	Number	%
2314 Primary education teaching professionals	6,400	14.1
2313 Secondary education teaching professionals	4,900	10.9
2319 Teaching professionals n.e.c.	3,600	7.9
3231 Higher level teaching assistants	2,900	6.4
6112 Teaching assistants	2,600	5.7
6113 Educational support assistants	2,100	4.6
2311 Higher education teaching professionals	1,500	3.3
2316 Special needs education teaching professionals	1,500	3.2
9232 School midday and crossing patrol occupations	900	2.0
4213 School secretaries	800	1.7
9263 Kitchen and catering assistants	700	1.6
6111 Early education and childcare assistants	600	1.4
3432 Sports coaches, instructors and officials	600	1.3
2321 Head teachers and principals	600	1.2
2312 Further education teaching professionals	600	1.2

*Source: IES calculations from Labour Force Survey, 2022, 4-quarter average and BRES 2021 data*

## 19.1.2 Demographics of workforce in priority sectors

**Table 1919.10 Demographics of workers in priority sectors, SLP, 2022**

		Health & social care	Construction & built environment	Information & communication	Hospitality & retail	Education	All sectors
Sex	Male	25.9	76.5	69.4	52.7	29.9	51.9
	Female	74.1	23.5	30.6	47.3	70.1	48.1
Ethnicity	White	43.7	74.7	65.7	55.2	68.2	61.4
	Mixed	1.8	1.9	2.5	3.8	3.5	2.8
	Asian	24.0	14.0	24.7	27.3	13.0	21.5
	Black	26.5	6.7	2.7	8.9	10.2	10.1
	Other	4.0	2.7	4.4	4.8	5.2	4.2
Age	Under 30	18.2	17.0	13.2	27.5	14.7	17.8
	30 to 39	23.8	24.5	29.9	30.0	23.5	26.4
	40 to 54	33.0	35.3	40.7	27.8	38.9	36.0
	55 and over	25.1	23.2	16.2	14.7	22.8	19.8
Disability	Disabled (EQA or work limiting)	15.7	15.2	14.0	15.4	17.1	15.7
	Not disabled	84.3	84.8	86.0	84.6	82.9	84.3

Note: Data are for whole of Outer London as this is the lowest geographical area for SLP in the Labour Force Survey

Source: Labour Force Survey, 2022, 4-quarter average

**Table 199.11 Qualifications of workers in priority sectors, SLP, 2022**

	<b>Health &amp; social care</b>	<b>Construction &amp; built environment</b>	<b>Information &amp; communication</b>	<b>Hospitality &amp; retail</b>	<b>Education</b>	<b>All sectors</b>
Degree or Equivalent	64.9	35.8	75.5	24.7	71.9	54.9
Higher Education	6.4	6.6	4.7	4.4	4.2	5.0
GCE A Level or Equivalent	12.1	24.4	10.4	24.3	12.5	16.6
GCSE Grades A*-C or Equivalent	6.2	13.9	4.5	21.4	6.2	11.0
Other/No Qualifications, or Don't know	10.5	19.3	4.9	25.3	5.2	12.5

Note: Data are for whole of Outer London as this is the lowest geographical area for SLP in the Labour Force Survey

Source: Labour Force Survey, 2022, 4-quarter average

## 19.2 Employment by occupation (residents, whole labour market)

**Table 19.12 Residents in employment by occupation in SLP, London and England, 2021 (%)**

	SLP	London	England
Managers	16.0	14.6	12.9
Professionals	25.9	25.8	20.3
Associate professionals	15.0	15.3	13.3
Administrative/clerical staff	9.2	8.5	9.3
Skilled trades occupations	7.8	7.5	10.2
Caring, leisure and other service staff	8.1	7.7	9.3
Sales and customer services staff	6.2	6.3	7.5
Machine operatives	4.5	5.0	6.9
Elementary staff	7.4	9.2	10.5
Total (thousands)	587	4,360	26,405

Source: Census of Population 2021

**Table 19.13 Residents in employment by occupation in SLP by borough, 2021 (%)**

	<b>Croydon</b>	<b>Kingston upon Thames</b>	<b>Merton</b>	<b>Richmond upon Thames</b>	<b>Sutton</b>
Managers	12.7	17.4	15.8	23.6	14.0
Professionals	22.9	28.4	26.2	31.2	24.0
Associate professionals	14.1	15.6	14.6	18.0	13.6
Administrative/clerical staff	10.2	8.5	8.2	7.1	10.8
Skilled trades occupations	8.4	6.9	8.1	4.6	10.0
Caring, leisure and other service staff	9.6	7.1	7.7	5.6	8.7
Sales and customer services staff	7.3	6.3	6.3	3.8	6.5
Machine operatives	5.7	3.4	4.6	2.2	5.2
Elementary staff	9.1	6.4	8.5	3.8	7.2
<b>Total</b>	<b>189,400</b>	<b>84,200</b>	<b>112,100</b>	<b>97,600</b>	<b>104,200</b>

Source: Census of Population 2021

## 19.3 Employment projections



**Table 19.14 Employment projections by sector, London, 2020-35 (thousands)**

	2020	2035	Change	% change
Agriculture/mining	3.7	2.7	-1.0	-26.6
Manufacturing	146.3	132.8	-13.5	-9.3
Electricity, gas, water	29.1	33.3	4.2	14.4
Construction	297.8	379.6	81.8	27.5
Wholesale/retail	638.7	632.0	-6.7	-1.0
Transport/storage	319.8	345.4	25.6	8.0
Accommodation/food	428.0	533.4	105.4	24.6
Information & comms	510.4	583.6	73.3	14.4
Financial services	403.9	414.9	11.0	2.7
Real estate activities	160.8	160.8	0.0	0.0
Professional services	778.0	871.9	93.9	12.1
Admin/support servs	583.2	643.2	60.0	10.3
Public administration	255.1	258.2	3.1	1.2
Education	428.9	426.3	-2.7	-0.6
Health & social care	585.5	618.4	32.9	5.6
Arts, ent, recreation	208.2	253.4	45.2	21.7
Other services	160.1	190.8	30.7	19.2
All sectors	5,937.4	6,480.7	543.4	9.2

Source: Institute for Employment Research

**Table 199.15 Employment projections for health and social care by occupation, London, 2020-35 (thousands)**

	2020	2035	Change	% change	% change health	% change social care
Managers, directors and senior officials	30.6	28.9	-1.7	-5.5	-2.3	-11.6
Professional occupations	239.4	234.6	-4.8	-2.0	1.9	-9.1
Associate professional occupations	90.9	133.0	42.1	46.3	52.2	35.7
Administrative and secretarial occupations	33.6	25.1	-8.5	-25.2	-22.6	-29.9
Skilled trades occupations	3.5	2.2	-1.3	-36.2	-35.3	-37.9
Caring, leisure and other service occupations	170.8	183.7	13.0	7.6	12.7	-1.4
Sales and customer service occupations	6.1	6.0	-0.2	-3.0	1.0	-10.4
Process, plant and machine operatives	2.3	1.6	-0.7	-30.3	-26.7	-35.8
Elementary occupations	8.3	3.2	-5.1	-61.6	-58.3	-66.9
All occupations	585.5	618.4	32.9	5.6	10.0	-2.3

Source: Institute for Employment Research

**Table 19.16 Employment projections for construction and built environment by occupation, London, 2020-35 (thousands)**

	2020	2035	Change	% change	% change construct- ion	% change architecture/ engineering
Managers, directors and senior officials	33.2	39.4	6.2	18.8	10.0	-8.0
Professional occupations	45.4	71.6	26.2	57.8	29.9	7.3
Associate professional occupations	24.0	32.4	8.5	35.4	16.9	-1.7
Administrative and secretarial occupations	24.2	25.9	1.7	7.2	0.4	-17.9
Skilled trades occupations	135.4	164.1	28.7	21.2	20.8	-13.7
Caring, leisure and other service occupations	1.6	1.6	0.1	3.6	5.7	16.2
Sales and customer service occupations	4.3	5.4	1.1	26.4	16.6	-3.9
Process, plant and machine operatives	17.2	21.4	4.1	23.9	23.3	-0.1
Elementary occupations	12.7	17.8	5.1	40.2	37.8	-9.6
All occupations	297.8	379.6	81.8	27.5	20.2	0.4

Source: Institute for Employment Research

**Table 199.17 Employment projections for information and communication by occupation, London, 2020-35 (thousands)**

	<b>2020</b>	<b>2035</b>	<b>Change</b>	<b>% change</b>	<b>% change media</b>	<b>% change information technology</b>
Managers, directors and senior officials	85.9	88.0	2.1	2.5	2.1	2.7
Professional occupations	209.9	274.4	64.5	30.7	25.8	32.3
Associate professional occupations	128.0	132.3	4.4	3.4	1.4	5.4
Administrative and secretarial occupations	27.9	26.5	-1.4	-4.9	-11.0	-0.7
Skilled trades occupations	19.8	18.4	-1.4	-6.9	-9.8	-5.0
Caring, leisure and other service occupations	9.5	11.2	1.6	16.8	8.2	24.3
Sales and customer service occupations	15.2	17.5	2.2	14.6	2.1	22.3
Process, plant and machine operatives	3.6	4.3	0.7	19.0	0.8	28.1
Elementary occupations	10.6	11.1	0.5	4.5	-4.7	20.4
All occupations	510.4	583.6	73.3	14.4	7.2	18.2

*Source: Institute for Employment Research*

**Table 199.18 Employment projections for retail and hospitality by occupation, London, 2020-35 (thousands)**

	<b>2020</b>	<b>2035</b>	<b>Change</b>	<b>% change</b>	<b>% change retail/ wholesale</b>	<b>% change hospitality</b>
Managers, directors and senior officials	136.6	148.4	11.8	8.7	0.9	31.0
Professional occupations	96.2	120.4	24.2	25.2	21.9	45.4
Associate professional occupations	92.7	106.7	14.0	15.1	7.4	57.5
Administrative and secretarial occupations	74.4	81.4	7.0	9.4	-3.8	55.6
Skilled trades occupations	106.0	120.0	14.0	13.2	1.9	18.4
Caring, leisure and other service occupations	23.4	29.9	6.5	27.6	5.6	34.3
Sales and customer service occupations	226.6	218.6	-7.9	-3.5	-11.5	55.2
Process, plant and machine operatives	35.3	40.2	4.8	13.7	-6.9	77.6
Elementary occupations	275.5	299.7	24.3	8.8	-10.2	13.4
All occupations	1,066.7	1,165.4	98.7	9.3	-1.0	24.6

Source: Institute for Employment Research

**Table 19.19 Employment projections for education by occupation, London, 2020-35 (thousands)**

	2020	2035	Change	% change
Managers, directors and senior officials	11.5	11.3	-0.2	-1.9
Professional occupations	313.5	324.0	10.5	3.4
Associate professional occupations	32.8	32.5	-0.3	-1.1
Administrative and secretarial occupations	9.8	6.2	-3.5	-36.2
Skilled trades occupations	2.4	1.8	-0.6	-24.6
Caring, leisure and other service occupations	32.0	30.5	-1.5	-4.7
Sales and customer service occupations	1.7	1.6	-0.1	-6.7
Process, plant and machine operatives	15.0	15.2	0.2	1.2
Elementary occupations	10.2	3.2	-7.1	-69.1
All occupations	428.9	426.3	-2.7	-0.6

*Source: Institute for Employment Research*

## 20 Data tables – recruitment and skills

### 20.1 Recruitment, hard-to-fill vacancies and skills shortages

#### 20.1.1 2022 results at the organisation level – Survation survey

**Table 20.1 Recruitment – Which of the following most applies to your business currently?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
We have many open job vacancies	21.2	23.4	27.3	11.5	29.0	22.2	30.0
We have some open job vacancies	34.5	38.1	36.4	37.2	46.0	35.2	30.0
We have few open job vacancies	18.6	16.3	9.1	24.4	15.3	14.8	20.0
We have no open job vacancies	24.8	21.1	27.3	26.9	9.7	24.1	20.0
Don't know	0.9	1.1	0.0	0.0	0.0	3.7	0.0
N=	113	1,016	77	78	124	54	20

Source: Survation survey, December 2022

**Table 20.2 Recruitment difficulties – Which of the following is closest to your view?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
We are struggling to fill some of our vacancies	58.3	65.0	75.0	77.2	75.9	66.7	43.8
We are not struggling to fill some of our vacancies	39.3	33.0	23.2	22.8	24.1	28.2	50.0
Don't know	2.4	2.0	1.8	0.0	0.0	5.1	6.3
N=	82	775	55	57	112	37	15

Source: *Survation survey, December 2022*

**Table 20.3 Recruitment difficulties – Which types of roles do you find it hardest to fill currently?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Professional/highly skilled specialists	53.1	49.0	52.4	34.1	56.5	46.2	57.1
Technical and skilled support roles	38.8	43.0	35.7	45.5	52.9	15.4	0.0
Managers	36.7	34.8	42.9	31.8	30.6	42.3	28.6
Skilled trades	36.7	30.2	57.1	34.1	24.7	11.5	0.0
Sales & customer service roles	34.7	26.3	14.3	34.1	34.1	26.9	42.9
Elementary roles eg entry-level, administration	20.4	23.7	16.7	18.2	25.9	11.5	28.6
Other	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Don't know	0.0	0.4	0.0	0.0	1.2	0.0	0.0
N=	49	514	42	44	85	26	7

Source: *Survation survey, December 2022*



**Table 20.4 Recruitment difficulties – What do you feel are the biggest drivers of recruitment challenges in your business?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Low number of suitable applicants with required skills	57.1	57.2	69.0	59.1	48.2	61.5	28.6
Too much competition from other employers	42.9	40.1	33.3	36.4	45.9	30.8	28.6
Lack of flexibility/hybrid working on offer	44.9	37.2	50.0	36.4	43.5	30.8	57.1
Job entails shift work/unsociable hours	30.6	31.3	31.0	36.4	44.7	11.5	42.9
Not enough interest in the roles	34.7	31.1	35.7	27.3	27.1	42.3	28.6
Other	0.0	0.8	2.4	0.0	0.0	3.8	0.0
Don't know	0.0	0.2	0.0	0.0	0.0	0.0	0.0
N=	49	514	42	44	85	26	7

Source: *Survation survey, December 2022*

## 20.1.2 2022 results at the organisation level – London Business 1000 survey

**Table 20.5 What, if anything, do you perceive as the main challenges for your business to do with skills and the labour market in the next 12 months?**

	SLP	London	Construction	Information & communication	Retail & hospitality	Public sector (inc. Education, Health & social care)
Pressure to increase wages	37.8	42.5	44.4	42.4	50.1	32.6
Staff retention	19.3	25.2	23.4	27.5	24.2	24.0

Official	Institute for Employment Studies					
Skills shortages among job applicants	17.4	24.6	27.5	25.1	24.0	18.3
Lack of applicants for job vacancies	24.5	24.6	19.7	20.2	29.5	35.4
The cost and time required to recruit new workers	20.2	24.2	26.0	23.9	25.8	25.6
Labour market changes following Brexit	11.3	19.7	19.4	17.5	24.4	25.2
Skills shortages among existing staff	14.3	14.0	14.9	10.6	16.4	23.3
Tougher immigration controls for non-UK labour	13.9	14.0	14.3	11.6	19.1	13.3
Managing a remote workforce	7.5	13.8	12.2	17.1	8.6	10.4
Flexible working arrangements	12.3	13.4	12.8	13.6	11.0	15.2
Productivity	8.8	13.3	14.2	11.0	12.3	8.3
Staff ill/ self-isolating because of COVID-19	5.9	10.6	13.3	8.2	13.1	11.9
Automation	5.2	5.3	7.1	5.0	4.6	5.3
Other	3.6	2.5	2.8	3.0	2.3	1.9
Don't know	4.1	4.8	5.6	3.7	4.5	6.6
None	14.4	10.3	8.3	12.8	11.3	11.6
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

### 20.1.3 2019 results at the establishment level – Employer Skills Survey

**Table 20.6 Recruitment, hard-to-fill vacancies and skills shortages, 2019**

	CLF	Local London	SLP	WLA	London	England
Have vacancies	33,700	8,500	6,400	10,900	59,500	295,900
No vacancies	118,900	52,700	27,100	54,500	253,300	1,383,200
Have vacancies %	22.1	13.8	19.2	16.7	19.0	17.6
Have HtF vacancies	12,100	3,700	2,800	4,200	22,800	130,900
No HtF vacancies	19,600	4,500	3,100	6,300	33,500	144,400
Don't know	2,000	300	500	400	3,200	20,600
Have HtF as % of those with vacancies	35.9	44.2	43.0	38.7	38.4	44.3
Have HtF as % of all	7.9	6.1	8.3	6.4	7.3	7.8
Have SSVs	9,100	2,600	2,100	3,200	17,100	95,200
No SSVs	3,000	1,100	600	1,000	5,800	35,700
Have SSVs as % of those with HtF	75.4	69.9	76.8	75.6	74.7	72.7
Have SSVs as % of those with vacancies	27.1	30.9	33.0	29.2	28.7	32.2
Have SSVs as % of all	6.0	4.3	6.3	4.9	5.5	5.7

Source: Employer Skills Survey 2019

**Table 20.7 Occupations with hard-to-fill vacancies, 2019**

	CLF	Local London	SLP	WLA	London	England
Managers	4.5	6.2	2.4	9.1	5.4	4.2
Professionals	13.8	16.0	12.0	13.8	14.0	15.1

Official

Institute for Employment Studies

Associate professionals	22.4	10.5	20.6	6.2	17.2	14.2
Administrative/clerical staff	8.0	11.0	6.0	12.4	9.1	7.1
Skilled trades occupations	13.8	21.0	20.9	20.0	17.0	24.3
Caring, leisure and other services staff	9.9	14.2	19.2	18.7	13.3	14.5
Sales and customer services staff	11.3	11.0	10.2	7.5	10.4	8.3
Machine operatives	5.1	8.5	6.4	10.6	6.8	8.5
Elementary staff	21.0	10.2	10.4	8.9	15.7	15.8
Unclassified	2.8	0.9	1.3	3.4	2.4	0.8
N=	12,100	3,700	2,800	4,200	22,800	130,900

Source: Employer Skills Survey 2019

Table 20.8 Causes of hard-to-fill vacancies, 2019

	CLF	Local London	SLP	WLA	London	England
Too much competition from other employers	7.6	0.8	3.8	5.1	5.6	7.4
Not enough people interested in doing this type of job	13.0	20.7	18.7	18.5	16.0	20.8
Poor terms and conditions (e.g. pay) offered for post	11.7	14.7	18.4	8.0	12.3	13.9
Low number of applicants with the required skills	38.8	26.5	33.3	39.2	36.2	38.4
Low number of applicants with the required attitude, motivation	14.6	8.6	4.4	11.8	11.9	14.5
Low number of applicants generally	13.0	17.7	19.7	13.4	14.7	17.9
Lack of work experience the company demands	18.5	14.5	6.5	17.0	16.1	16.6
Lack of qualifications the company demands	14.1	12.7	10.0	7.9	12.2	12.4
Poor career progression / lack of prospects	1.0	2.6	0.0	1.3	1.2	1.7

	CLF	Local London	SLP	WLA	London	England
Job entails shift work/unsociable hours	6.4	6.4	6.4	7.4	6.6	10.2
Seasonal work	0.8	0.2	0.7	4.0	1.3	1.4
Remote location/poor public transport	1.6	5.7	4.2	2.7	2.8	10.1
Poor recruitment channels/mechanisms (inc. lack/cost of ads)	0.8	1.8	0.0	2.4	1.1	1.3
Not full-time/permanent	1.9	2.8	4.6	1.0	2.2	1.8
Difficulty with work permits/immigration issues for non-EU	1.6	0.0	0.0	0.9	1.0	0.3
Low number of suitable applicants inc. Age of applicants	4.4	5.2	9.6	4.0	5.1	2.0
Benefits trap	0.0	0.9	0.0	0.0	0.1	0.6
Lack of funding for the position	1.0	2.4	0.3	0.2	1.0	0.5
Brexit (e.g. fewer EU applicants)	2.4	1.1	1.6	1.0	1.8	1.2
High turnover of staff / problems with staff retention	0.3	0.3	0.5	0.0	0.2	0.6
Other	14.0	13.7	8.1	10.4	12.6	7.4
No particular reason	0.4	0.3	0.0	0.2	0.3	0.4
Don't know	2.6	1.8	1.5	3.0	2.4	1.9
N=	12,100	3,700	2,800	4,200	22,800	130,900

Source: Employer Skills Survey 2019

**Table 20.9 Occupations with skills shortage vacancies, 2019**

	CLF	Local London	SLP	WLA	London	England
Managers	4.9	1.9	3.2	9.7	5.1	4.3

Official

Institute for Employment Studies

Professionals	16.0	16.4	11.6	13.0	15.0	15.7
Associate professionals	25.9	12.4	20.5	5.2	19.3	15.8
Administrative/clerical staff	7.7	14.7	6.2	10.5	9.1	7.2
Skilled trades occupations	13.5	24.8	19.8	23.2	17.8	25.9
Caring, leisure and other services staff	9.2	14.2	20.0	21.8	13.7	13.3
Sales and customer services staff	8.5	9.4	11.5	6.5	8.6	7.2
Machine operatives	3.6	9.9	6.0	7.7	5.6	8.1
Elementary staff	17.8	4.7	9.6	8.3	13.0	12.1
Unclassified	2.6	1.3	1.3	4.5	2.6	0.8
N=	9,100	2,600	2,100	3,200	17,100	95,200

Source: Employer Skills Survey 2019

**Table 20.10 Technical/practical skills difficult to obtain from applicants, 2019**

	CLF	Local London	SLP	WLA	London	England
Computer literacy / basic IT skills	16.2	21.3	31.7	24.9	20.6	21.0
Advanced or specialist IT skills	18.6	20.8	23.1	17.2	19.2	20.3
Solving complex problems requiring a solution specific to the situation	47.9	51.5	41.4	49.3	47.9	44.9
Reading and understanding instructions, guidelines, manuals or reports	37.3	42.1	38.3	45.7	39.7	32.3
Writing instructions, guidelines, manuals or reports	29.7	37.7	32.4	40.7	33.3	26.7
Basic numerical skills and understanding	27.3	42.4	29.4	26.4	29.7	26.9
More complex numerical or statistical skills and understanding	28.4	43.2	28.0	24.7	29.9	28.8

Communicating in a foreign language	24.4	18.5	12.4	17.0	20.6	14.4
Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	18.4	26.1	24.3	29.0	22.3	21.8
Adapting to new equipment or materials	23.0	34.4	27.4	37.6	28.0	24.9
Knowledge of products and services offered by your organisation and organisations like yours	48.7	50.6	39.8	50.8	48.3	43.9
Knowledge of how your organisation works	39.9	37.6	35.1	44.8	39.9	35.3
Specialist skills or knowledge needed to perform the role	69.4	61.7	63.8	61.3	66.0	67.9
None of the above	6.6	4.2	7.4	6.4	6.3	7.3
Don't know	7.2	5.0	4.0	6.8	6.4	4.1
N=	9,100	2,600	2,100	3,200	17,100	95,200

Source: Employer Skills Survey 2019

**Table 20.11 Soft/people skills difficult to obtain from applicants, 2019**

	CLF	Local London	SLP	WLA	London	England
Instructing, teaching or training people	28.5	23.9	27.4	30.8	28.1	25.5
Sales skills	30.3	20.3	30.6	26.8	28.2	25.9
Customer handling skills	44.2	39.1	34.4	45.2	42.4	40.2
Persuading or influencing others	36.9	25.9	29.3	33.0	33.5	30.6
Team working	36.2	49.4	33.5	39.2	38.5	37.9
Managing or motivating other staff	32.7	48.6	35.5	37.6	36.4	35.5

Ability to manage own time and prioritise own tasks	51.6	62.0	54.0	50.8	53.4	52.4
Setting objectives for others and planning human, financial and other resources	26.1	40.2	24.5	38.7	30.4	25.4
Managing their own feelings, or handling the feelings of others	37.8	33.6	39.6	35.9	37.0	37.2
Making speeches or presentations	24.8	12.0	19.8	23.8	22.1	16.6
None of the above	18.3	11.7	21.3	17.4	17.5	20.9
Don't know	10.7	6.7	8.6	6.7	9.1	5.9
N=	9,100	2,600	2,100	3,200	17,100	95,200

Source: Employer Skills Survey 2019

**Table 20.12 Technical/practical skills difficult to obtain from applicants by sector, London, 2019**

	Health & social care	Construction	Info. & comms	Retail & hospitality	Education	All sectors
Computer literacy / basic IT skills	30.1	13.9	30.3	20.1	24.2	20.6
Advanced or specialist IT skills	22.6	14.1	57.8	13.4	12.1	19.2
Solving complex problems requiring a solution specific to the situation	60.2	40.3	72.4	44.3	35.8	47.9
Reading and understanding instructions, guidelines, manuals or reports	37.9	53.4	26.1	50.8	42.7	39.7
Writing instructions, guidelines, manuals or reports	41.9	39.2	25.0	40.6	44.5	33.3
Basic numerical skills and understanding	30.6	31.9	27.6	31.2	28.7	29.7
More complex numerical or statistical skills and understanding	24.1	39.0	45.7	25.3	32.3	29.9
Communicating in a foreign language	20.8	22.7	9.6	31.3	18.4	20.6



Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	10.2	41.0	10.0	30.1	13.5	22.3
Adapting to new equipment or materials	18.9	30.2	26.5	30.0	38.1	28.0
Knowledge of products and services offered by your organisation and organisations like yours	44.8	46.2	56.4	48.3	31.1	48.3
Knowledge of how your organisation works	46.4	41.8	38.1	43.5	39.8	39.9
Specialist skills or knowledge needed to perform the role	65.1	85.6	72.2	61.1	55.1	66.0
None of the above	10.9	2.5	6.0	8.1	7.6	6.3
Don't know	2.6	1.3	5.6	7.5	5.3	6.4
N=	1,600	1,800	1,100	4,600	1,000	17,100

Source: Employer Skills Survey 2019

**Table 20.13 Soft/people skills difficult to obtain from applicants by sector, London, 2019**

	Health & social care	Construction	Info. & comms	Retail & hospitality	Education	All sectors
Instructing, teaching or training people	24.0	25.1	9.3	39.5	29.2	28.1
Sales skills	20.8	25.5	18.2	38.1	14.1	28.2
Customer handling skills	39.7	57.4	26.7	50.4	23.5	42.4
Persuading or influencing others	39.2	27.3	21.8	39.6	31.3	33.5
Team working	50.4	35.4	32.7	43.8	40.9	38.5
Managing or motivating other staff	44.3	33.9	29.8	43.0	34.5	36.4
Ability to manage own time and prioritise own tasks	55.6	61.4	42.7	62.4	49.2	53.4
Setting objectives for others and planning human, financial and other resources	25.1	37.1	46.4	33.3	21.3	30.4

Official

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Managing their own feelings, or handling the feelings of others	36.5	32.5	27.8	42.8	43.1	37.0
Making speeches or presentations	16.5	22.9	22.8	21.4	23.2	22.0
None of the above	19.4	19.1	16.8	13.3	19.5	17.5
Don't know	5.6	3.3	16.1	10.2	9.0	9.1
N=	1,600	1,800	1,100	4,600	1,000	17,100

Source: Employer Skills Survey 2019

## 20.2 Skills gaps

### 20.2.1 2022 results at the organisation level – Survation survey

**Table 20.14 Skills gaps – thinking about your existing workforce, which of the following applies to your business?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Existing workforce has the skills and capabilities to meet the business needs	66.4	65.6	72.7	65.4	67.7	68.5	55.0
Some gaps in skills and capacity	30.1	31.2	22.1	32.1	29.8	24.1	40.0
Significant gaps in skills and capacity	3.5	3.2	5.2	2.6	2.4	7.4	5.0
N=	113	1,016	77	78	124	54	20

Source: *Survation survey, December 2022*

**Table 20.15 Skills gaps – Which skills or capabilities is your business currently lacking?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Sector specific technical skills	60.5	58.3	57.1	55.6	67.5	82.4	55.6
Cross-cutting transferable skills, such as negotiation and resilience	47.4	42.3	33.3	40.7	32.5	29.4	33.3
Basic digital skills	34.2	32.9	47.6	33.3	20.0	23.5	55.6
Basic maths skills (numerical or statistical skills and understanding)	31.6	22.6	23.8	25.9	22.5	29.4	11.1
English skills (reading and writing)	15.8	20.6	23.8	11.1	25.0	23.5	22.2
Green skills	21.1	20.6	23.8	11.1	15.0	5.9	0.0
Other	0.0	1.4	4.8	7.4	0.0	0.0	0.0
Don't know	0.0	1.1	4.8	3.7	0.0	0.0	11.1
N=	38	350	21	27	40	17	9

Source: *Survation survey, December 2022*

## 20.2.2 2022 results at the organisation level – London Business 1000 survey

**Table 20.16 In which of the following roles, if any, does your business face challenges in terms of skills?**

	SLP	London	Constr- uction	Info. & comms (plus Prof. servs)	Retail & hospitality	Public sector (inc. Education, Health & social care)
Skilled manual/ technical roles	36.4	32.3	35.7	28.7	31.9	23.8
Professional/ managerial roles	28.0	37.5	39.3	44.8	28.3	36.1
Un/ semi-skilled roles	11.0	12.0	15.5	4.8	22.3	3.6
Clerical roles	5.3	13.9	16.8	11.4	13.2	15.2
Don't know	5.5	4.4	4.2	4.7	3.2	6.7
My business does not face any challenges in terms of skills for any of these roles	29.6	27.2	27.8	26.7	28.1	35.3
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

**Table 20.17 What are the main types of skills, if any, where your company faces challenges among your current workforce?**

	SLP	London	Constr- uction	Info. & comms (plus Prof. servs)	Retail & hospitality	Public sector (inc. Education, Health & social care)
Technical or job-specific skills	29.4	31.1	34.0	36.5	27.3	14.1
Advanced or specialist IT skills	17.4	16.6	12.3	25.2	9.2	13.8
Literacy and written communication skills	10.1	10.8	9.3	12.2	7.3	13.5
Management / interpersonal skills	10.9	17.6	18.3	17.6	17.7	10.0
Customer and sales skills	11.2	16.6	14.0	11.1	24.2	18.5
Basic IT skills	10.4	8.6	9.9	5.0	5.0	11.6
Team working	9.5	13.5	11.5	12.2	17.6	15.0
Commercial awareness / knowledge of your organisation	12.2	15.3	17.0	12.6	18.2	12.1
Leadership skills	15.5	16.6	16.5	16.3	15.5	15.3
Time management skills	11.8	14.0	13.4	13.0	17.7	6.9
Foreign language skills	7.7	7.0	11.3	5.3	5.5	1.7
Complex numerical / statistical skills	6.6	9.5	9.1	9.8	5.1	11.9
Problem solving skills	14.7	16.6	21.1	12.7	17.0	13.8
Basic numeracy skills	3.8	4.4	7.2	2.7	3.7	3.3
Other	2.9	2.2	0.7	1.1	4.6	6.6
Don't know	2.0	3.7	2.1	2.9	3.2	16.6
My company does not face any skills challenges	29.4	24.2	29.9	24.1	25.4	23.7
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

### 20.2.3 2019 results at the establishment level – Employer Skills Survey

**Table 20.18 Skills gaps, 2019**

	CLF	Local London	SLP	WLA	London	England
Have skills gaps	17,000	6,500	3,700	7,300	34,400	231,200
No skills gaps	135,700	54,700	29,900	58,200	278,400	1,447,800
Skills gaps %	11.1	10.7	10.9	11.1	11.0	13.8

Source: Employer Skills Survey 2019

**Table 20.19 Occupations with skills gaps, 2019**

	CLF	Local London	SLP	WLA	London	England
Managers	21.2	13.2	15.0	19.2	18.6	18.4
Professionals	15.8	6.1	5.5	8.3	11.3	8.5
Associate professionals	12.3	9.8	8.8	6.0	10.1	9.1
Administrative/clerical staff	30.8	23.6	23.2	25.9	27.6	23.5
Skilled trades occupations	9.7	17.5	13.2	15.8	12.8	17.0
Caring, leisure and other services staff	5.2	9.8	12.4	8.0	7.4	9.2
Sales and customer services staff	27.6	22.3	31.3	23.9	26.2	23.6
Machine operatives	2.2	6.5	6.6	7.4	4.6	8.7
Elementary staff	17.1	17.7	17.3	16.7	17.2	20.7
N=	17,000	6,500	3,700	7,300	34,400	231,200

Source: Employer Skills Survey 2019

**Table 20.20 Technical/practical skills difficult lacking among existing staff, 2019**

	CLF	Local London	SLP	WLA	London	England
Computer literacy / basic IT skills	31.9	31.8	22.4	27.3	29.9	26.6
Advanced or specialist IT skills	27.9	25.4	20.3	24.3	25.9	22.1
Solving complex problems requiring a solution specific to the situation	51.3	42.7	49.3	45.8	48.3	45.4
Reading and understanding instructions, guidelines, manuals or reports	31.3	32.3	35.8	33.0	32.3	31.8
Writing instructions, guidelines, manuals or reports	28.4	20.9	27.3	27.7	26.7	24.4
Basic numerical skills and understanding	23.0	28.4	20.8	25.1	24.2	20.8
More complex numerical or statistical skills and understanding	26.1	32.0	24.1	24.2	26.6	23.3
Communicating in a foreign language	20.7	21.8	15.1	18.8	19.9	10.6
Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	10.6	17.7	17.1	12.6	13.1	15.6
Adapting to new equipment or materials	31.0	32.6	27.1	34.1	31.6	31.9
Knowledge of products and services offered by your organisation and organisations like yours	49.5	45.0	38.6	42.5	46.0	48.1
Knowledge of how your organisation works	44.1	42.1	37.8	38.2	41.8	39.6
Specialist skills or knowledge needed to perform the role	61.1	51.4	60.5	52.3	57.3	56.7
None of the above	7.2	14.9	6.6	10.9	9.4	9.0
Don't know	2.3	0.6	1.0	0.9	1.5	0.8
N=	17,000	6,500	3,700	7,300	34,400	231,200

Source: Employer Skills Survey 2019

**Table 20.21 Soft/people skills lacking among existing staff, 2019**

	CLF	Local London	SLP	WLA	London	England
Instructing, teaching or training people	37.7	32.3	31.5	31.7	34.8	28.5
Sales skills	39.5	26.4	31.5	32.0	34.6	31.9
Customer handling skills	52.4	41.2	49.7	44.8	48.4	47.3
Persuading or influencing others	44.8	28.2	39.9	37.2	39.5	34.1
Team working	50.3	39.9	45.2	46.6	47.0	46.4
Managing or motivating other staff	46.2	32.4	34.5	40.5	41.1	35.9
Ability to manage own time and prioritise own tasks	69.5	56.2	64.5	53.6	63.1	61.7
Setting objectives for others and planning human, financial and other resources	37.0	29.5	26.0	26.0	32.1	25.3
Managing their own feelings, or handling the feelings of others	47.3	42.7	44.7	36.7	43.9	42.7
Making speeches or presentations	25.5	11.8	17.6	20.4	21.0	17.0
None of the above	9.7	16.7	10.3	15.7	12.3	15.9
Don't know	1.1	1.7	1.7	1.4	1.3	0.9
N=	17,000	6,500	3,700	7,300	34,400	231,200

Source: Employer Skills Survey 2019



**Table 20.22 Occupations with skills gaps by sector, London, 2019**

	<b>Health &amp; social care</b>	<b>Constr- uction</b>	<b>Info. &amp; comms</b>	<b>Retail &amp; hospitality</b>	<b>Education</b>	<b>All sectors</b>
Managers	22.0	7.6	18.8	23.2	15.8	18.6
Professionals	10.8	24.9	31.6	0.8	26.9	11.3
Associate professionals	6.4	15.2	19.1	2.6	3.2	10.1
Administrative/clerical staff	39.5	17.3	17.0	15.0	33.3	27.6
Skilled trades occupations	3.9	40.3	5.9	15.4	6.9	12.8
Caring, leisure and other services staff	39.6	0.0	0.0	0.8	62.5	7.4
Sales and customer services staff	6.0	8.6	28.1	42.6	7.4	26.2
Machine operatives	1.0	4.3	2.0	4.6	0.0	4.6
Elementary staff	10.1	3.6	1.4	30.9	22.5	17.2
N=	2,300	3,000	900	12,700	1,400	34,400

*Source: Employer Skills Survey 2019*

**Table 20.23 Technical/practical skills lacking among existing staff by sector, London, 2019**

	<b>Health &amp; social care</b>	<b>Constr- uction</b>	<b>Info. &amp; comms</b>	<b>Retail &amp; hospitality</b>	<b>Education</b>	<b>All sectors</b>
Computer literacy / basic IT skills	29.8	31.7	38.0	28.1	46.3	29.9
Advanced or specialist IT skills	29.5	38.1	38.7	18.6	16.6	25.9
Solving complex problems requiring a solution specific to the situation	51.4	62.1	54.8	44.8	41.8	48.3
Reading and understanding instructions, guidelines, manuals or reports	36.1	26.9	26.0	32.6	35.5	32.3
Writing instructions, guidelines, manuals or reports	36.7	28.6	14.1	24.9	38.0	26.7
Basic numerical skills and understanding	20.0	35.4	28.8	26.9	27.1	24.2
More complex numerical or statistical skills and understanding	25.6	39.2	28.3	24.8	20.5	26.6
Communicating in a foreign language	22.2	18.5	10.1	27.4	9.6	19.9
Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	9.4	26.3	4.8	15.9	6.7	13.1
Adapting to new equipment or materials	32.2	38.8	22.4	36.9	30.2	31.6
Knowledge of products and services offered by your organisation and organisations like yours	41.2	34.7	57.1	49.9	32.2	46.0
Knowledge of how your organisation works	44.8	43.9	44.5	41.2	43.8	41.8
Specialist skills or knowledge needed to perform the role	61.1	51.5	67.0	53.6	56.5	57.3
None of the above	9.6	13.2	13.4	7.5	9.6	9.4
Don't know	0.9	0.9	0.0	2.4	0.0	1.5
N=	2,300	3,000	900	12,700	1,400	34,400

Source: Employer Skills Survey 2019

**Table 20.24 Soft/people skills lacking among existing staff by sector, London, 2019**

	Health & social care	Construction	Info. & comms	Retail & hospitality	Education	All sectors
Instructing, teaching or training people	45.0	32.2	29.6	40.3	38.8	34.8
Sales skills	23.5	30.9	28.6	47.7	8.9	34.6
Customer handling skills	42.3	45.2	41.7	57.2	32.0	48.4
Persuading or influencing others	48.7	44.2	40.8	42.7	37.8	39.5
Team working	58.3	34.2	35.1	52.6	65.2	47.0
Managing or motivating other staff	56.8	31.5	38.2	48.5	41.3	41.1
Ability to manage own time and prioritise own tasks	71.3	48.7	54.9	66.2	69.7	63.1
Setting objectives for others and planning human, financial and other resources	33.6	37.1	29.7	33.9	37.2	32.1
Managing their own feelings, or handling the feelings of others	52.3	40.1	32.9	47.6	53.0	43.9
Making speeches or presentations	29.4	21.1	25.9	21.2	18.6	21.0
None of the above	8.9	15.3	21.1	8.1	9.4	12.3
Don't know	3.0	1.4	0.0	0.5	0.6	1.3
N=	2,300	3,000	900	12,700	1,400	34,400

Source: Employer Skills Survey 2019

## 20.3 Future skills needs

**Table 20.25 How confident, if at all, are you that your business understands its skills needs over the next 2 to 5 years?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health and social care
Very confident	32.7	39.5	48.1	33.3	39.5	38.9	25.0
Quite confident	54.0	52.4	45.5	53.8	55.6	50.0	60.0
Not that confident	12.4	7.5	6.5	11.5	4.8	11.1	15.0
Not at all confident	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Don't know	0.9	0.3	0.0	1.3	0.0	0.0	0.0
N=	113	1,016	77	78	124	54	20

Source: *Survation survey, December 2022*

**Table 20.26 Which skills do you feel your business will need most over the next 2 to 5 years?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Advanced digital skills	45.1	55.9	53.2	61.5	59.7	48.1	55.0
Sector specific technical skills	43.4	49.1	59.7	38.5	54.0	61.1	25.0
Basic digital skills	38.9	33.1	37.7	30.8	42.7	25.9	30.0
Cross-cutting transferable skills, such as negotiation and resilience	31.0	30.5	22.1	46.2	25.8	22.2	35.0
Basic maths skills (numerical or statistical skills and understanding)	36.3	28.8	16.9	35.9	33.1	37.0	20.0
English skills (reading or writing)	25.7	23.2	19.5	23.1	31.5	18.5	35.0
Green skills	29.2	22.9	22.1	20.5	27.4	18.5	20.0
Other	0.0	1.4	3.9	6.4	0.0	1.9	20.0
Don't know	2.7	2.3	3.9	10.3	0.0	1.9	5.0
N=	113	1,016	77	78	124	54	20

Source: *Survation survey, December 2022*

## 21 Data tables – training provision

This chapter sets out detail on training and apprenticeships, and uses the same three survey sources as the previous chapter. It all presents data on AEB and HE provision in the SLP area.

**Table 21.1 Is your business currently engaged with any of the following educational institutions?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Independent training providers	23.9	33.2	40.3	21.8	44.4	42.6	15.0
Universities	29.2	32.4	27.3	24.4	40.3	42.6	40.0
Job Centre Plus or other employment service providers	30.1	30.2	27.3	32.1	37.9	25.9	30.0
We are delivering apprenticeships	26.5	27.1	28.6	25.6	40.3	16.7	20.0
Further Education colleges	25.7	22.8	23.4	19.2	29.0	25.9	20.0
We are delivering T-Levels	17.7	19.0	23.4	20.5	26.6	20.4	10.0
Other	0.9	0.8	0.0	0.0	0.0	7.4	0.0
None	27.4	20.8	23.4	30.8	8.1	13.0	40.0
Don't know	2.7	0.9	1.3	1.3	0.0	3.7	0.0
N=	113	1,016	77	78	124	54	20

Source: *Survation survey, December 2022*

**Table 21.2 What are the barriers, if any, to your business engaging with full and part-time training for staff?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
Cost of training	55.8	46.8	45.5	46.2	36.3	63.0	90.0
Time available with the business	42.5	41.8	46.8	47.4	51.6	35.2	45.0
Relevance or quality of local training courses	31.9	40.5	48.1	41.0	60.5	42.6	45.0
Knowing where to find the right training	32.7	34.2	33.8	30.8	43.5	37.0	15.0
Location of training	38.1	30.3	35.1	25.6	34.7	29.6	35.0
Other	0.9	0.6	0.0	2.6	0.8	3.7	0.0
Don't know	0.0	1.8	0.0	7.7	0.0	3.7	0.0
We don't have any barriers	10.6	9.1	6.5	2.6	5.6	7.4	0.0
N=	113	1016	77	78	124	54	20

Source: *Survation survey, December 2022*

**Table 21.3 Thinking about your investment in training over the next year, how, if at all, do you think it will change?**

	SLP	London	Construction	Retail & hospitality	Information & communication	Education	Health & social care
It will increase significantly	23.9	28.7	27.3	19.2	40.3	13.0	25.0
It will increase somewhat	35.4	40.1	40.3	52.6	43.5	46.3	25.0
It will stay the same	31.0	25.2	26.0	21.8	9.7	29.6	35.0
It will decrease significantly	4.4	2.9	5.2	2.6	2.4	7.4	10.0
It will decrease a lot	2.7	2.0	1.3	3.8	3.2	1.9	0.0
Don't know	2.7	1.2	0.0	0.0	0.8	1.9	5.0
NET: Increase (Significantly+Somewhat)	59.3	68.8	67.5	71.8	83.9	59.3	50.0
NET: Decrease (Somewhat+Significantly)	7.1	4.8	6.5	6.4	5.6	9.3	10.0
Net Increase (Increase-Decrease)	52.2	64.0	61.0	65.4	78.2	50.0	40.0
N=	113	1016	77	78	124	54	20

Source: *Survation survey, December 2022*



**Table 21.4 Which, if any, of the following would help you to improve the skills of your workforce the most?**

	SLP	London	Constr- uction	Retail & hospitality	Information & communication	Educ- ation	Health & social care
Greater availability of online training courses and qualifications	42.5	47.0	46.8	47.4	49.2	51.9	65.0
Courses that have been co-designed by employers and providers	31.0	38.0	33.8	30.8	32.3	33.3	25.0
Greater availability of short modular courses and qualifications	34.5	37.5	37.7	37.2	42.7	38.9	40.0
Government skills and employment programmes which are easy to understand	31.9	36.6	40.3	44.9	33.9	33.3	50.0
Tutors that have up to date knowledge of the industry	38.1	35.8	28.6	35.9	33.1	35.2	40.0
A form of tax incentive to off-set the cost of training	43.4	34.4	41.6	39.7	35.5	35.2	25.0
Help with finding a potential training partner	38.1	33.1	31.2	30.8	39.5	29.6	40.0
More responsive local training providers	31.0	30.7	36.4	28.2	33.9	31.5	15.0
Other	0.0	1.0	1.3	6.4	0.0	0.0	5.0
None of the above	0.0	2.0	2.6	6.4	0.0	1.9	5.0
N=	113	1,016	77	78	124	54	20

Source: *Survation survey, December 2022*

**Table 21.5 Does your company currently employ any apprentices?**

	<b>SLP</b>	<b>London</b>	<b>Construction</b>	<b>Info. &amp; comms (plus Prof. servs)</b>	<b>Retail &amp; hospitality</b>	<b>Public sector (inc. Education, Health &amp; social care)</b>
Yes	7.3	13.6	15.0	10.7	10.1	17.4
No	90.9	84.7	81.5	87.8	88.9	82.6
Don't know	1.9	1.7	3.5	1.5	1.0	0.0
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

**Table 21.6 To the best of your knowledge, is your company required to pay the apprenticeship levy?**

	<b>SLP</b>	<b>London</b>	<b>Construction</b>	<b>Info. &amp; comms (plus Prof. servs)</b>	<b>Retail &amp; hospitality</b>	<b>Public sector (inc. Education, Health &amp; social care)</b>
Yes	8.5	13.9	16.9	12.7	8.9	13.6
No	64.4	47.9	48.8	49.2	47.8	57.4
Don't know	27.2	38.1	34.3	38.1	43.3	29.0
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

**Table 21.7 Does your business plan to use apprenticeship funding over the next 12 months?**

	SLP	London	Construction	Info. & comms (plus Prof. servs)	Retail & hospitality	Public sector (inc. Education, Health & social care)
Yes	12.4	14.4	19.8	10.3	11.7	17.2
No	72.8	63.5	63.9	64.4	66.5	62.3
Don't know	14.8	22.0	16.3	25.3	21.8	20.5
Unweighted N=	163	1,369	173	408	272	86

Source: London Business 1000 survey, July-September 2022

**Table 21.8 Whether employ Apprentices, 2019**

	CLF	Local London	SLP	WLA	London	England
Yes	6.2	6.5	7.6	8.7	7.0	10.5
No	93.1	92.5	91.5	90.7	92.3	89.1
Don't know	0.7	1.1	1.0	0.6	0.8	0.4
N=	115,400	45,800	28,600	52,700	242,500	1,683,100

Source: Employer Skills Survey 2019

**Table 21.9 Reasons for not employing Apprentices, 2019**

	CLF	Local London	SLP	WLA	London	England
They are not suitable due to the size of establishment	22.0	20.3	25.8	24.1	22.6	21.2
We are not looking to recruit new staff	8.2	12.6	12.0	12.7	10.5	18.8
All our staff fully skilled, no need	8.6	11.3	6.6	12.0	9.7	13.7
We cannot currently afford to	9.6	8.9	7.4	7.8	8.8	8.1
Don't suit our business model	9.0	8.1	8.8	6.0	8.2	6.2
Apprenticeships are not offered for our industry	6.5	5.8	9.1	6.0	6.6	8.4
Prefer to recruit experienced staff	7.3	6.0	4.7	5.9	6.5	6.5
No need (unspec.)	5.9	7.2	4.3	6.7	6.1	4.2
Never have before so haven't considered it	5.2	6.1	3.8	5.5	5.3	5.6
Don't have time to train them	6.3	2.8	1.8	3.9	4.6	4.8
We don't have the resources (various)	4.4	3.0	4.5	3.5	4.0	2.5
Decision made by Head Office / someone else	3.8	3.0	3.6	1.5	3.2	2.5
Don't have the work to offer them	1.7	4.5	3.3	3.7	2.8	3.0
Not relevant to business	3.1	2.4	3.0	1.9	2.7	1.8
Regulatory or bureaucratic restrictions or requirements	1.9	2.4	2.9	2.5	2.3	2.9
Prefer other forms of training	2.8	1.0	3.0	1.0	2.1	2.4
Past apprentices have not been of a good standard	1.9	1.9	1.0	1.2	1.6	2.2
No one has enquired about doing one lately	1.1	1.0	0.6	3.3	1.5	1.4
Currently looking into offering them in the future	0.9	0.7	0.9	2.9	1.3	0.8
Specialist job roles / niche business	1.5	1.0	2.0	0.5	1.2	0.8
N=	96,800	39,600	23,300	43,700	203,400	1,340,400

Source: Employer Skills Survey 2019

**Table 21.10 Training status, 2019**

	CLF	Local London	SLP	WLA	London	England
Train both off and on-the-job	34.6	29.5	31.2	30.5	32.4	31.6
Train off-the-job only	10.2	9.3	12.3	12.0	10.6	12.1
Train on-the-job only	16.7	15.7	16.1	15.0	16.1	18.2
Do not train	38.5	45.6	40.4	42.5	40.9	38.1
N=	152,600	61,200	33,500	65,500	312,800	1,679,100

Source: Employer Skills Survey 2019

**Table 21.11 Whether establishment has provided any EXTERNAL training, 2019**

	CLF	Local London	SLP	WLA	London	England
Yes	71.3	66.8	62.4	69.5	68.9	73.6
No	28.1	32.2	37.0	28.7	30.2	25.8
Don't know	0.6	1.1	0.5	1.9	0.9	0.6
N=	51,200	16,200	15,000	19,400	101,800	697,300

Source: Employer Skills Survey 2019

**Table 21.12 Use of external training sources, 2019**

	CLF	Local London	SLP	WLA	London	England
Further Education Colleges	17.0	15.7	9.7	12.7	15.0	23.1
Universities or other Higher Education institutions	16.0	9.5	11.5	16.2	14.4	12.6
Other commercial organisations, e.g. consultants or private training providers	75.4	70.7	76.7	66.7	73.2	76.8
Regulatory bodies	33.9	35.1	22.6	26.4	31.1	28.7
Your customers	9.9	10.7	8.2	8.4	9.5	6.5
Any of your suppliers	23.2	28.5	34.5	29.0	26.7	27.7
Other non-profit making organisations, e.g. employer associations, voluntary organisations	30.9	15.1	24.0	10.1	23.5	20.0
Government Institutions e.g. councils/local authorities, NHS	0.5	0.5	3.3	1.9	1.2	1.3
Other	1.8	5.6	3.1	3.2	2.8	1.3
Don't know	2.4	1.8	0.0	1.2	1.7	1.6
N=	36,500	10,800	9,400	13,500	70,200	513,400

Source: Employer Skills Survey 2019

### 21.1.1 AEB provision

The largest subject area in terms of AEB aims enrolments across the SLP area is preparation for life and work, which includes predominantly basic skills qualifications in English, mathematics and English for Speakers of Other Languages, accounting for 45 per cent of all AEB provision, and more than half of adult skills provision (55%).

Arts, media and publishing is the next largest subject area for adult skills provision, and is the largest subject area for community learning, accounting for 14 per cent of all provision, and 41 per cent of community learning, which may provide skills for the creative and design sub-sectors within information and communication. Health, public services and care is the third largest subject area, accounting for 10 per cent of total provision and 12 per cent of adult skills provision, which will provide skills for the health and social care sector.

Provision related to the other SLP priority sectors accounts for a small proportion of the total.

**Table 21.13 AEB aims enrolments by subject, SLP, 2021/22**

	Community learning	Adult skills	All AEB
Health, Public Services and Care	4.3	11.8	9.7
Science and Mathematics	0.6	1.6	1.3
Agriculture, Horticulture and Animal Care	0.6	0.5	0.6
Engineering and Manufacturing Technologies	0.0	1.7	1.2
Construction, Planning and the Built Environment	0.1	2.9	2.1
Information and Communication Technology (ICT)	4.6	7.2	6.5
Retail and Commercial Enterprise	2.4	3.9	3.5
Leisure, Travel and Tourism	5.8	0.9	2.2
Arts, Media and Publishing	41.0	4.2	14.2
History, Philosophy and Theology	3.9	0.1	1.1
Social Sciences	0.6	0.1	0.2
Languages, Literature and Culture	18.1	2.1	6.4

Education and Training	0.1	2.3	1.7
Preparation for Life and Work	16.8	55.4	44.8
Business, Administration, Finance and Law	1.2	5.6	4.4
Total aims enrolments	13,960	37,270	51,240

*Source: GLA, Adult Education Budget, August 2021-July 2022*

### 21.1.2 HE provision

In terms of HE student enrolments at South London HE providers in 2021/22, Kingston University accounts for three quarters of all students, and St Mary's accounts for 21 per cent, while small numbers study at Richmond American University and Spurgeon's College (theological college). Data are also provided for South London plus St George's (medicine) and Roehampton (mainly business and social sciences) universities, as these are located on the border between with South London and Wandsworth.

The largest subject areas in the SLP area are subjects allied to medicine (19%), business and management (15%) and design, and creative and performing arts (14%), with subjects allied to medicine and design and creative studies being over-represented in comparison with provision across London. Including St George's and Roehampton boosts provision in medicine and allied subjects to 27 per cent of total provision compared with 15 per cent across London.



**Table 21.14 HE student enrolments by subject, SLP and London, 2021/22**

	SLP	SLP + St Georges & Roehampton	London
01 Medicine and dentistry	0.0	5.0	4.0
02 Subjects allied to medicine	19.2	21.5	10.7
03 Biological and sport sciences	6.2	5.5	3.4
04 Psychology	5.7	5.4	4.1
05 Veterinary sciences	0.0	0.0	0.7
06 Agriculture, food and related studies	0.0	0.0	0.1
07 Physical sciences	1.7	1.0	2.2
09 Mathematical sciences	0.4	0.2	2.1
10 Engineering and technology	6.9	4.1	6.4
11 Computing	5.9	5.8	6.1
13 Architecture, building and planning	3.0	1.8	2.3
26 Geography, earth and environmental studies	1.0	0.6	0.8
15 Social sciences	6.9	6.8	9.6
16 Law	2.8	3.1	6.0
17 Business and management	15.2	18.0	19.1
19 Language and area studies	1.1	1.5	2.4
20 Historical, philosophical and religious studies	1.6	1.8	2.6
22 Education and teaching	5.2	5.2	1.6
23 Combined and general studies	0.4	0.4	0.7
24 Media, journalism and communications	3.2	3.3	2.4
25 Design, and creative and performing arts	13.6	9.0	12.9
Total students	16,115	27,150	286,985

*Source: Higher Education Statistics Agency, 2021/2*

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