



Mind the Skills Gap – Local Skills Improvement Plan Technical Report for the Local London Sub-region

May 2023

Appendix tables

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Contents

1	Introduction and methodology	1
1.1	Method	1
1.1.1	<i>Quantitative analysis</i>	1
1.1.2	<i>Qualitative data collection</i>	3
2	Employment characteristics	5
2.1	Employment by sector	5
2.1.1	<i>Employment by occupation within priority sectors</i>	15
2.1.2	<i>Demographics of workforce in priority sectors</i>	21
2.2	Employment by occupation (residents, whole labour market)	22
2.3	Employment projections	25
3	Recruitment and skills	31
3.1	Recruitment, hard-to-fill vacancies and skills shortages	31
3.1.1	<i>2022 results at the organisation level – Survation survey</i>	31
3.1.2	<i>2022 results at the organisation level – London Business 1000 survey</i>	34
3.1.3	<i>2019 results at the establishment level – Employer Skills Survey</i>	35
3.2	Skills gaps	43
3.2.1	<i>2022 results at the organisation level – Survation survey</i>	43
3.2.2	<i>2022 results at the organisation level – London Business 1000 survey</i>	45
3.2.3	<i>2019 results at the establishment level – Employer Skills Survey</i>	47
3.3	Future skills needs	53
4	Training provision	55
4.1.1	<i>AEB provision</i>	64
4.1.2	<i>HE provision</i>	66

1 Introduction and methodology

This report presents tables with detailed results to accompany the Local London Local Skills Improvement Plan (LSIP) Report.

Chapter 2 sets out more detail on employment characteristics within the Local London sub-regional partnership, and Chapters 3 and 4 then set out detail on recruitment and skills issues (Chapter 3) and on training and apprenticeships (Chapter 4).

1.1 Method

The work to support the Local London LSIP 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.

1.1.1 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:

- Construction and engineering – defined as the SIC Section F Construction plus SIC Division 71 Architectural and engineering activities;
- Digital and creative – defined as SIC Section J Information and communication, plus SIC Divisions 90 Creative, arts and entertainment activities and 91 Libraries, archives, museums and other cultural activities;

- Health and social care – defined as SIC Section Q Human health and social work activities;
- Manufacturing – defined as SIC Section C Manufacturing; and
- Distribution and logistics – defined as SIC Section H Transportation and storage.

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 Local London, South London Partnership and West London Alliance, so the results for Local London 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 Local London 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 Local London 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 Research as part of the Skills Imperative 2035 programme¹. The projections are produced at the 2-digit SIC level which allows precise mapping onto the Local London priority sectors, and presents breakdowns by occupational major groups (1-digit

¹ <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>

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:

- 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 Local London 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.

Information on green skills issues was taken from the reports “Green Jobs and Skills in Local London” and “Accelerating Green Skills in Local London Through Effective Industry Engagement – A Summary Report”, both produced for Local London.

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.

1.1.2 Qualitative data collection

To complement the statistical data and surveys, a number of qualitative consultations were undertaken. These included:

- 2 in-person workshops to explore key skills issues in the priority sectors and suggestions for actionable priorities;
- 2 online mini-workshops covering similar ground to the in-person workshops;
- 10 online interviews with employers, providers and other stakeholders.

Through these consultations, views were gathered from 18 employers or employer bodies, 12 providers, and 12 stakeholder organisations (boroughs etc.).

In addition, Local London ran a short online survey to gather views, with invitations sent to over 130 providers/councils/employers/chambers. Responses were obtained from 23 organisations. Other consultation work carried out by Local London gathered views from:

- Daikin, Quantum and CEME (covering green skills and manufacturing).
- Bromley Economic Partnership
- Local London Skills and Employment Officers Group
- Local London Employment and Skills Board
- ACE Heads Strategy Group

2 Employment characteristics

2.1 Employment by sector

There are a number of sectors that account for a greater proportion of total employees in the Local London area than they do in London or the country as a whole. The construction sector accounts for seven per cent of all employees in Local London, twice the proportion as in London as a whole and above the proportion for Great Britain of five per cent, while wholesale and retail sector accounts for 16 per cent of all employees in the Local London area, compared with 11 per cent in London and 14 per cent in Great Britain. The transportation and storage sector is also larger in the Local London area than in London (5.8% compared with 4.3%) but only slightly larger than in Great Britain (5.0%), as is the health and social care sector (14.2% in Local London compared with 10.6% in London and 13.6% in Great Britain). The administrative and support services sector, and the education sector, are also over-represented in Local London compared with the regional and national proportions. 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 larger proportion of employment in Local London than in the country as a whole.

The manufacturing sector is larger in Local London than it is across the whole of London, but below average in size compared with the country as a whole.

The financial services sector is much smaller in Local London than in London or Great Britain (1.7% of employment in London) while the professional services sector, and the information and communications sector, are also smaller in Local London than in London or Great Britain.

Table 2.1 Employees in employment by sector, 2021

	LL number	LL %	London %	GB %
Agriculture/mining	800	0.1	0.1	0.9
Manufacturing	27,400	3.4	2.1	7.6
Electricity, gas, water	10,300	1.3	0.7	1.2
Construction	21,700	2.7	3.5	4.9
Wholesale/retail	168,500	21.0	11.4	14.4
Transport/storage	46,600	5.8	4.3	5.0
Accommodation/food	55,500	6.9	7.4	7.5
Information & comms	22,400	2.8	8.4	4.4
Financial services	13,600	1.7	8.0	3.6
Real estate activities	14,100	1.7	2.5	1.8
Professional services	49,500	6.2	14.2	8.9
Admin/support servs	88,500	11.0	9.7	8.9
Public administration	40,500	5.0	4.6	4.6
Education	88,000	11.0	7.3	8.7
Health & social care	114,300	14.2	10.6	13.6
Arts, ent, recreation	21,600	2.7	2.8	2.3
Other services	20,100	2.5	2.5	1.9
All sectors	803,200	100	100	100

Source: Business Register and Employment Survey, 2021

Between 2015 and 2021, the total number of employees in employment in Local London increased by nearly 10 per cent, which represents a larger increase than in London or Great Britain (9.7% in Local London compared with 8.4% in London and 5.7% in Great Britain). The main growth sectors in Local London were construction, which increased by 56 per cent, professional services (26% increase albeit from a small baseline), public administration (central/ local government and other public sector bodies; 26% increase) and other services (34% increase). There were also large increases in employment in transportation and storage (22%) and accommodation and food (21%). There were falls in employment in financial services, information and communication, real estate activities, education, and manufacturing.

Table 2.2 Change in employees in employment by sector, 2015-2021

	Local London				London	GB
	2015	2021	Change	% change	% change	% change
Agriculture/mining	800	800	0	6.0	-11.1	-3.3
Manufacturing	31,700	27,400	-4,200	-13.4	-3.5	-2.5
Electricity, gas, water	9,300	10,300	1,000	10.4	54.2	12.5
Construction	17,000	21,700	4,700	27.5	34.0	13.1
Wholesale/retail	152,900	168,500	15,600	10.2	-1.8	-2.9
Transport/storage	38,300	46,600	8,300	21.5	1.3	15.5
Accommodation/food	46,000	55,500	9,600	20.8	5.3	10.0
Information & comms	23,200	22,400	-800	-3.4	16.7	13.4
Financial services	15,000	13,600	-1,300	-8.9	20.1	6.7
Real estate activities	14,700	14,100	-600	-4.1	2.3	13.3
Professional services	39,200	49,500	10,300	26.3	13.8	12.1
Admin/support servs	77,000	88,500	11,500	14.9	-1.9	5.4
Public administration	32,300	40,500	8,300	25.6	14.3	10.9
Education	92,000	88,000	-4,000	-4.3	0.0	1.5
Health & social care	109,500	114,300	4,800	4.3	12.1	8.8
Arts, ent, recreation	18,500	21,600	3,100	17.0	15.5	1.3
Other services	15,000	20,100	5,100	33.9	12.9	-4.1
N=	732,100	803,200	71,100	9.7	8.4	5.7

Source: Business Register and Employment Survey, 2015-2021

Table 2.3 Employees in employment by priority sector, 2021

	Barking & Dagenham	Bexley	Bromley	Enfield	Greenwich
Construction and engineering	8.8	10.1	8.0	8.1	6.6
Digital and creative	1.9	3.0	4.2	3.6	5.2
Health and social care	9.5	11.0	15.6	15.1	17.3
Manufacturing	8.3	5.6	1.9	4.3	2.7
Distribution and logistics	9.4	6.3	3.0	7.3	6.5
All priority sectors	37.9	36.1	32.7	38.4	38.3
N=	57,600	75,100	105,800	109,200	86,600

Source: Business Register and Employment Survey, 2021

Table 2.4 Employees in employment by priority sector, 2021

	Havering	Newham	Redbridge	Waltham Forest
Construction and engineering	10.1	6.7	7.9	7.3
Digital and creative	2.4	2.4	4.7	3.3
Health and social care	21.1	8.8	16.3	13.3
Manufacturing	3.2	3.4	1.6	3.3
Distribution and logistics	6.1	6.4	3.4	4.6
All priority sectors	42.8	27.8	33.9	31.8
N=	85,300	127,300	83,000	73,200

Source: Business Register and Employment Survey, 2021

Figure 2.1 Proportion of employment in construction and engineering

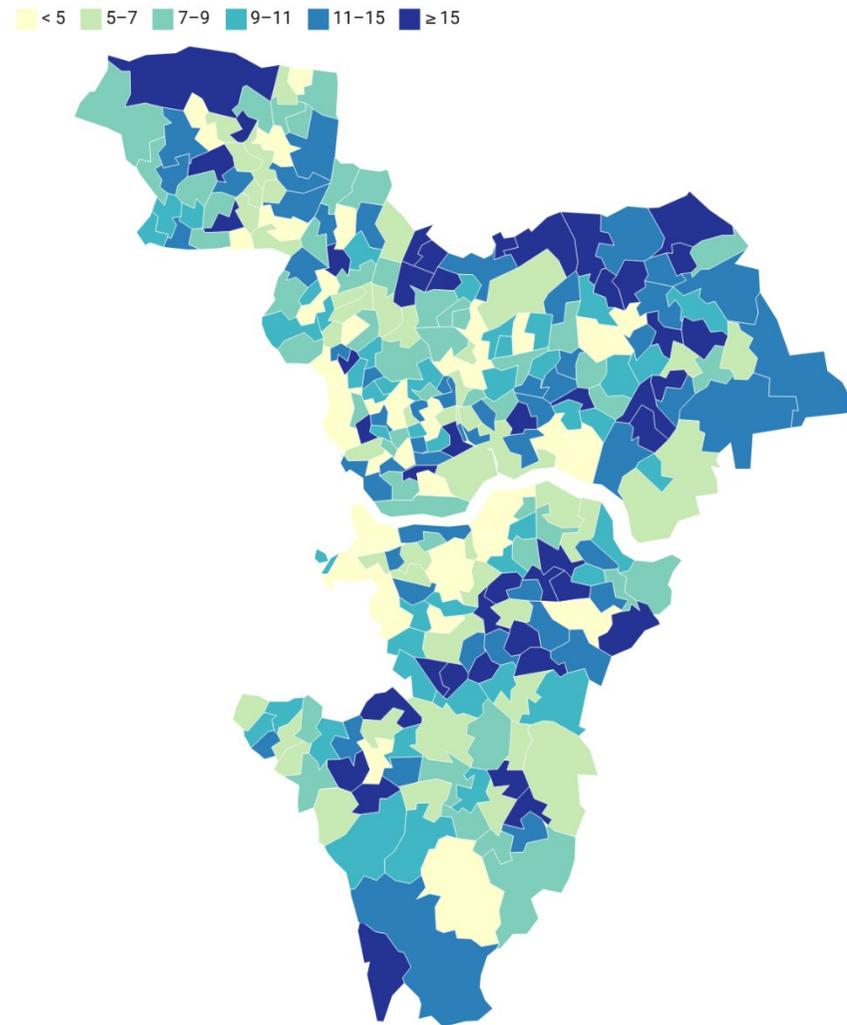
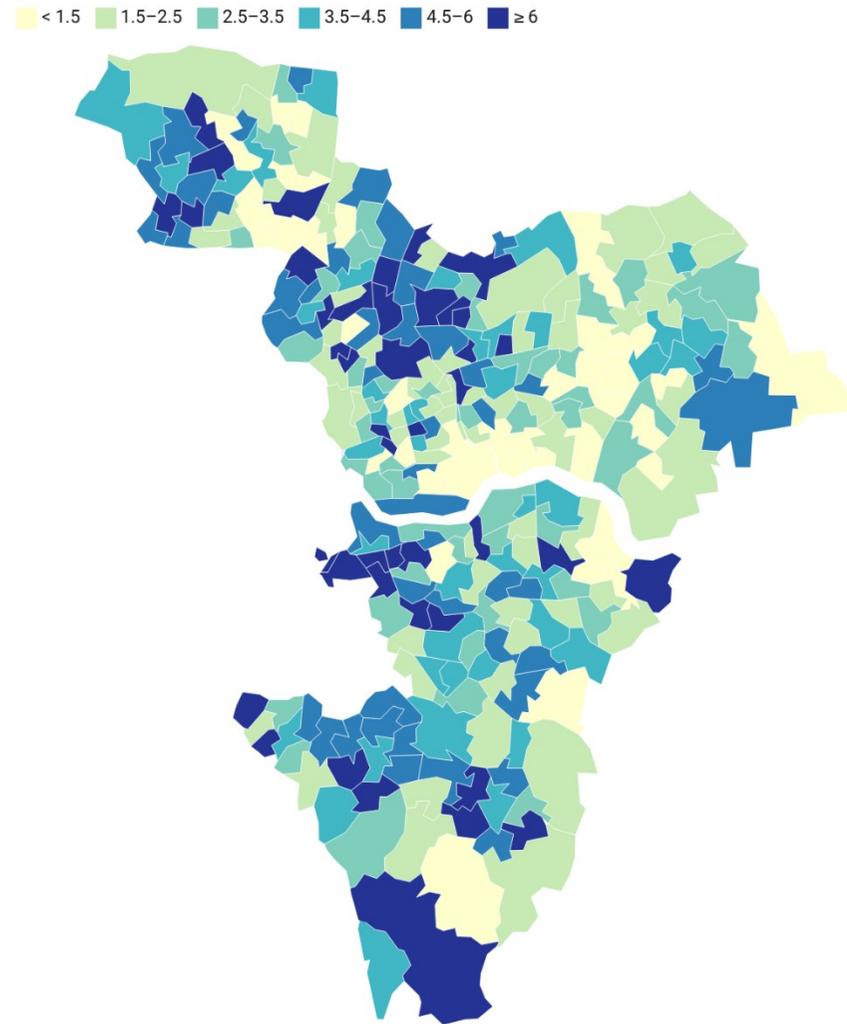


Figure 2.2 Proportion of employment in digital and creative



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

Figure 2.3 Proportion of employment in health and social care

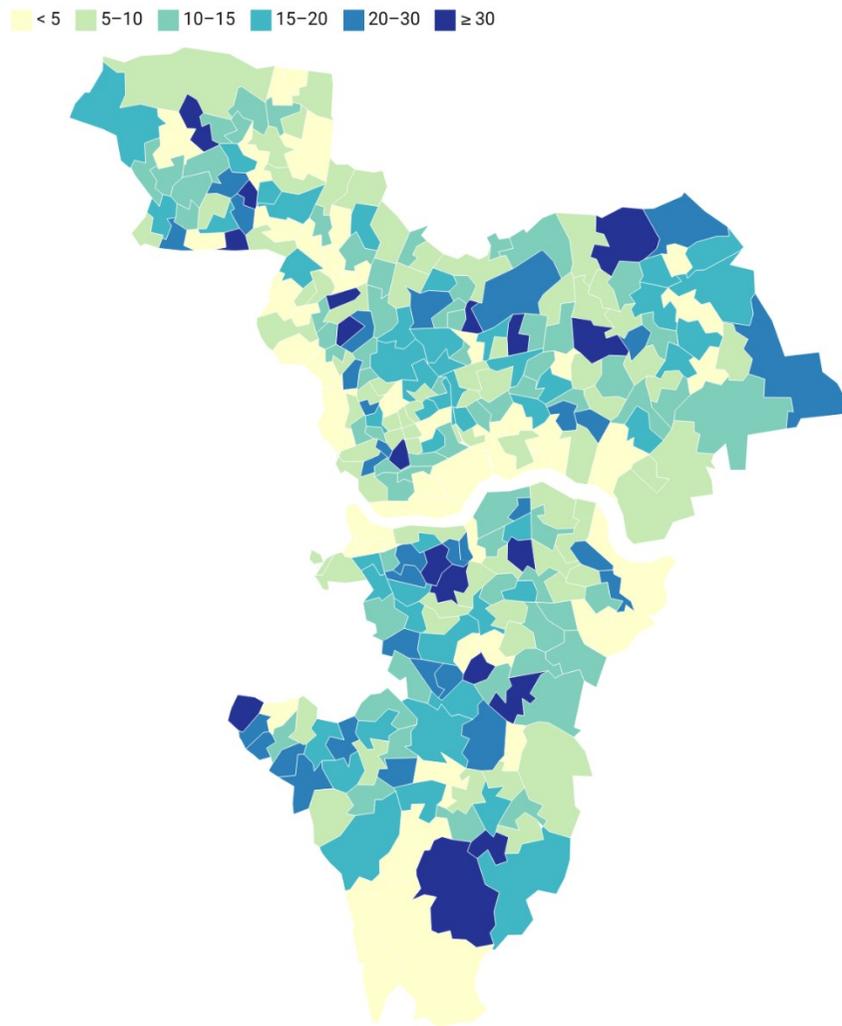


Figure 2.4 Proportion of employment in manufacturing

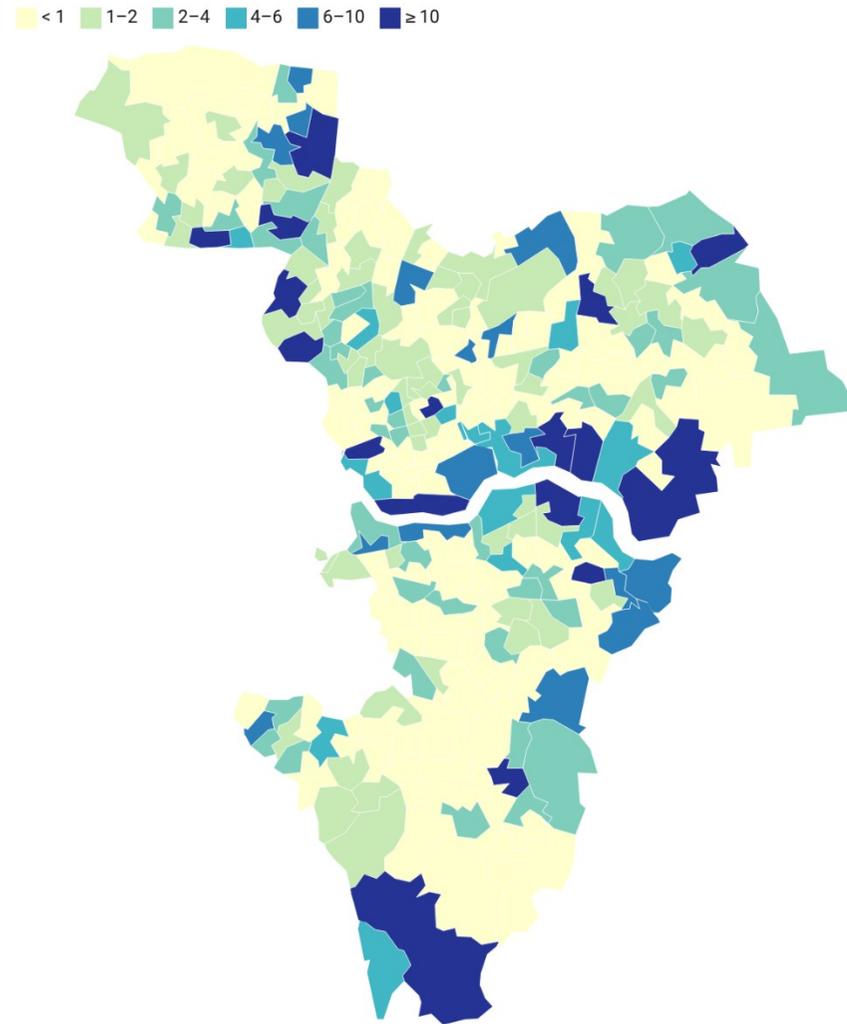
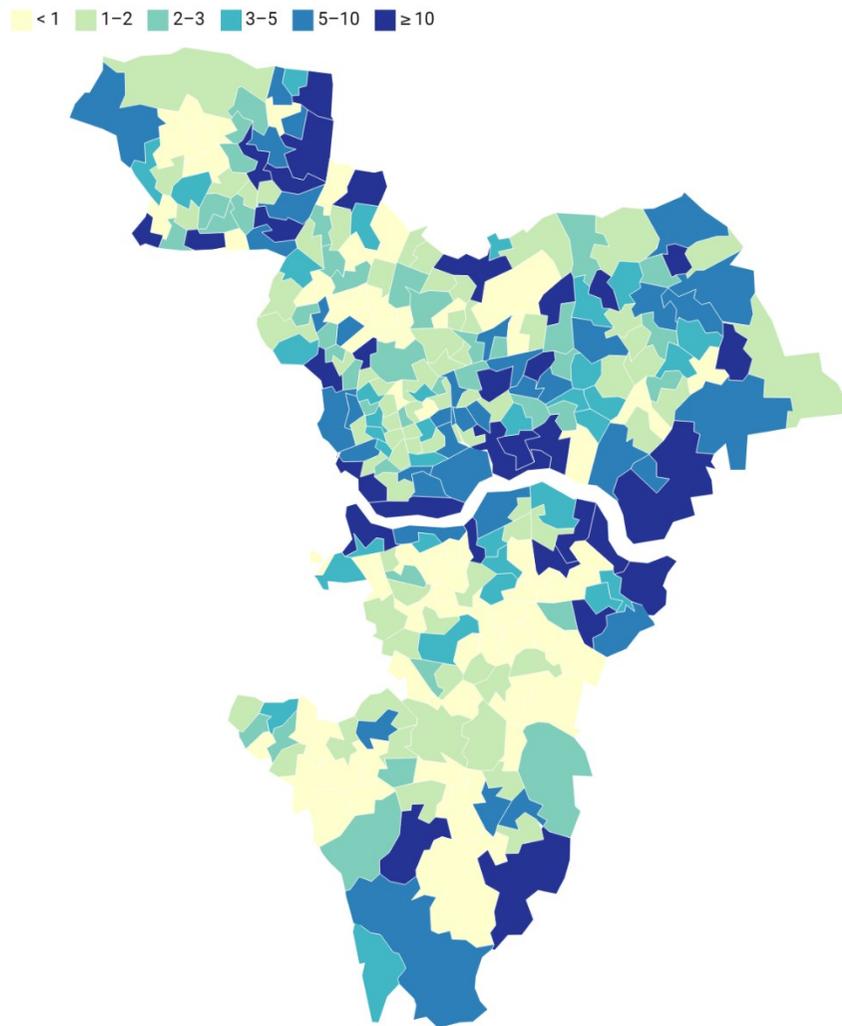


Figure 2.5 Proportion of employment in distribution and logistics



2.1.1 Employment by occupation within priority sectors

Table 2.5 Employment by occupation in Local London priority sectors, Local London, 2022

	Construction & engineering	Digital & Creative	Health & social care	Manufacturing	Distribution & logistics	All sectors
Managers, directors and senior officials	13.7	12.7	8.1	14.2	10.0	11.7
Professional occupations	22.8	52.2	42.1	15.3	6.1	33.6
Associate professional occupations	14.4	22.5	9.0	15.2	8.2	15.0
Administrative and secretarial occupations	8.5	5.9	8.1	9.1	14.6	10.4
Skilled trades occupations	31.5	2.7	*	18.3	4.2	6.4
Caring, leisure and other service occupations	*	*	28.8	*	17.0	8.4
Sales and customer service occupations	*	*	*	*	*	4.9
Process, plant and machine operatives	4.9	*	*	28.1	24.3	3.8
Elementary occupations	2.7	*	2.1	16.3	13.3	5.9

Note: Data are for whole of Outer London as this is the lowest geographical area for Local London in the Labour Force Survey; except for manufacturing which is based on occupational profile of national employment by sub-sector applied to the sub-sector employment figures for Local London

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

Table 2.6 Largest detailed occupations in construction and engineering, Local London, 2022

	Number	%
5316 Carpenters and joiners	4,600	7.1
5319 Construction and building trades n.e.c.	4,300	6.6
5241 Electricians and electrical fitters	4,200	6.4
5315 Plumbers & heating and ventilating installers and repairers	4,100	6.3
5323 Painters and decorators	2,500	3.9
1122 Production managers and directors in construction	2,500	3.8
9129 Elementary construction occupations n.e.c.	1,900	2.9
5321 Plasterers	1,400	2.2
5322 Floorers and wall tilers	1,300	2.1
4159 Other administrative occupations n.e.c.	1,300	2.1

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

Table 2.7 Largest detailed occupations in digital and creative, Local London, 2022

	Number	%
2134 Programmers and software development professionals	4,200	15.2
2139 Information technology professionals n.e.c.	1,200	4.5
2132 IT managers	1,200	4.3
3416 Arts officers, producers and directors	1,100	4.1
2133 IT business analysts, architects and systems designers	1,000	3.8
1137 Information technology directors	800	2.8
3556 Sales accounts and business development managers	600	2.3
3132 IT user support technicians	600	2.2
3411 Artists	500	1.9
2492 Newspaper and periodical journalists and reporters	500	1.7

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

Table 2.8 Largest detailed occupations in health and social care, Local London, 2022

	Number	%
6135 Care workers and home carers	14,700	12.9
6131 Nursing auxiliaries and assistants	8,700	7.6
2237 Other nursing professionals	6,400	5.6
2211 Generalist medical practitioners	4,100	3.6
2212 Specialist medical practitioners	3,800	3.3
2461 Social workers	2,700	2.4
3229 Welfare and housing associate professionals n.e.c.	2,600	2.2
2232 Community nurses	2,000	1.8
4216 Receptionists	2,000	1.7
4159 Other administrative occupations n.e.c.	2,000	1.7

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

Table 2.9 Largest detailed occupations in manufacturing, Local London, 2022

	Number	%
8111 Food, drink and tobacco process operatives	2,500	8.5
1121 Production managers and directors in manufacturing	1,200	4.0
9132 Packers, bottlers, canners and fillers	900	3.1
9252 Warehouse operatives	800	2.9
3556 Sales accounts and business development managers	700	2.6
5223 Metal working production and maintenance fitters	600	2.0
9139 Elementary process plant occupations n.e.c.	500	1.9
2129 Engineering professionals n.e.c.	500	1.6
4122 Book-keepers, payroll managers and wages clerks	500	1.6
4159 Other administrative occupations n.e.c.	400	1.3

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

Table 2.10 Largest detailed occupations in distribution and logistics, Local London, 2022

	Number	%
8211 Large goods vehicle drivers	5,400	11.7
9252 Warehouse operatives	5,000	10.8
8213 Taxi and cab drivers and chauffeurs	4,800	10.2
8212 Bus and coach drivers	2,600	5.6
8214 Delivery drivers and couriers	2,600	5.6
9211 Postal workers, mail sorters and messengers	2,500	5.4
1241 Managers in transport and distribution	1,500	3.1
4159 Other administrative occupations n.e.c.	800	1.8
8219 Road transport drivers n.e.c.	800	1.7
8231 Train and tram drivers	800	1.6

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

2.1.2 Demographics of workforce in priority sectors

Table 2.11 Demographics of workers in priority sectors, Local London, 2022

		Construction & engineering	Digital & Creative	Health & social care	Manufacturing	Distribution & logistics	All sectors
Sex	Male	76.5	66.5	25.9	60.2	70.3	51.9
	Female	23.5	33.5	74.1	39.8	29.7	48.1
Ethnicity	White	74.7	68.5	43.7	70.2	55.3	61.4
	Mixed	*	3.4	1.8	*	2.4	2.8
	Asian	14.0	21.9	24.0	19.6	22.8	21.5
	Black	6.7	2.3	26.5	4.9	12.1	10.1
	Other	*	3.8	4.0	*	7.3	4.2
Age	Under 30	17.0	14.1	18.2	16.2	9.5	17.8
	30 to 39	24.5	28.9	23.8	27.3	24.1	26.4
	40 to 54	35.3	40.2	33.0	40.4	47.4	36.0
	55 and over	23.2	16.8	25.1	16.1	18.9	19.8
Disability	Disabled (EQA or work limiting)	15.2	15.2	15.7	12.1	13.5	15.7
	Not disabled	84.8	84.8	84.3	87.9	86.5	84.3

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

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

Table 2.12 Qualifications of workers in priority sectors, Local London, 2022

	Financial & professional services	Information & communication	Health & social care	Arts, entertainment, recreation	Retail & hospitality	All sectors
Degree or Equivalent	35.8	74.4	64.9	61.1	29.2	54.9
Higher Education	6.6	5.5	6.4	3.6	8.4	5.0
GCE A Level or Equivalent	24.4	10.7	12.1	14.6	20.5	16.6
GCSE Grades A*-C or Equivalent	13.9	4.4	6.2	10.2	18.4	11.0
Other/No Qualifications, or Don't know	19.3	5.0	10.5	10.6	23.5	12.5

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

2.2 Employment by occupation (residents, whole labour market)

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

The occupational distribution of Local London residents is broadly similar to that for all London residents albeit with slightly higher proportions in skilled trades occupations, machine operatives, elementary staff and administrative/clerical staff. These differences to some extent reflect the priority sectors in Local London – construction, manufacturing, and distribution and logistics.

Table 2.13 Residents in employment by occupation in Local London, London and England, 2021 (%)

	LL	London	England
Managers	13.0	14.6	12.9
Professionals	22.8	25.8	20.3
Associate professionals	13.7	15.3	13.3
Administrative/clerical staff	9.7	8.5	9.3
Skilled trades occupations	9.4	7.5	10.2
Caring, leisure and other service staff	8.2	7.7	9.3
Sales and customer services staff	7.0	6.3	7.5
Machine operatives	5.9	5.0	6.9
Elementary staff	10.5	9.2	10.5
Total (thousands)	1,019	4,360	26,405

Source: Census of Population 2021

Table 2.14 Residents in employment by occupation in Local London by borough, 2021 (%)

	Barking & Dagenham	Bexley	Bromley	Enfield	Greenwich	Havering	Newham	Redbridge	Waltham Forest
Managers	8.2	12.3	17.2	12.7	13.2	12.4	9.5	13.2	12.4
Professionals	16.1	19.8	26.7	20.5	25.1	19.5	20.0	24.3	22.9
Associate professionals	9.8	13.7	15.9	12.3	14.8	13.4	12.0	12.2	15.1
Administrative/clerical staff	9.3	13.2	10.9	9.6	8.1	13.4	7.7	10.3	8.3
Skilled trades occupations	11.6	10.4	7.9	10.0	7.5	11.5	10.1	9.1	10.0
Caring, leisure and other service staff	11.6	8.8	6.9	9.7	9.3	8.2	8.7	6.9	7.5
Sales and customer services staff	8.1	6.9	5.2	7.4	6.4	6.5	8.9	7.6	6.6
Machine operatives	9.5	6.3	3.6	6.6	5.0	6.5	7.2	6.5	5.9
Elementary staff	15.9	8.6	5.6	11.2	10.6	8.6	15.9	9.9	11.2
Total	94,600	118,000	162,100	143,900	142,900	124,800	163,500	141,600	140,400

Source: Census of Population 2021

2.3 Employment projections

Table 2.15 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 2.16 Employment projections for construction and engineering 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 2.17 Employment projections for digital and creative by occupation, London, 2020-35 (thousands)

	2020	2035	Change	% change	% change media	% change information technology	% change creative arts/ culture
Managers, directors and senior officials	98.6	103.8	5.2	5.3	2.1	2.7	24.2
Professional occupations	237.5	309.0	71.5	30.1	25.8	32.3	25.3
Associate professional occupations	187.3	197.0	9.6	5.1	1.4	5.4	8.8
Administrative and secretarial occupations	34.7	33.1	-1.6	-4.6	-11.0	-0.7	-3.4
Skilled trades occupations	26.9	27.6	0.8	2.8	-9.8	-5.0	30.1
Caring, leisure and other service occupations	13.8	16.1	2.4	17.2	8.2	24.3	18.0
Sales and customer service occupations	18.5	20.9	2.4	12.8	2.1	22.3	4.6
Process, plant and machine operatives	3.9	4.6	0.7	17.3	0.8	28.1	0.5
Elementary occupations	14.0	13.1	-1.0	-6.8	-4.7	20.4	-41.7
All occupations	635.2	725.2	89.9	14.2	7.2	18.2	13.4

Source: Institute for Employment Research

Table 2.18 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 2.19 Employment projections for manufacturing by occupation, London, 2020-35 (thousands)

	2020	2035	Change	% change	% change food, drink, tobacco	% change engineering	% change other manufacturing
Managers, directors and senior officials	25.7	22.4	-3.2	-12.5	-4.0	26.1	-22.2
Professional occupations	27.1	29.4	2.3	8.5	26.6	58.2	-7.7
Associate professional occupations	26.2	24.0	-2.2	-8.5	5.4	33.9	-20.6
Administrative and secretarial occupations	12.6	10.8	-1.8	-14.4	-6.6	18.3	-25.4
Skilled trades occupations	22.7	17.1	-5.7	-24.9	-21.1	8.2	-29.9
Caring, leisure and other service occupations	2.2	1.9	-0.2	-10.7	-4.7	3.9	-15.7
Sales and customer service occupations	5.3	4.8	-0.5	-9.6	-5.4	33.6	-19.1
Process, plant and machine operatives	14.6	12.7	-1.9	-13.0	-5.2	30.4	-25.8
Elementary occupations	10.0	9.7	-0.3	-2.8	8.3	33.8	-22.4
All occupations	146.3	132.8	-13.5	-9.3	-0.5	34.8	-20.6

Source: Institute for Employment Research

Table 2.20 Employment projections for distribution and logistics by occupation, London, 2020-35 (thousands)

	2020	2035	Change	% change	% change transport	% change warehousing/courier
Managers, directors and senior officials	29.7	30.3	0.6	1.9	9.8	-5.7
Professional occupations	33.8	47.8	14.0	41.4	47.4	31.4
Associate professional occupations	36.4	43.4	7.1	19.5	23.6	10.8
Administrative and secretarial occupations	30.1	32.1	2.0	6.5	6.0	7.1
Skilled trades occupations	13.8	14.0	0.2	1.1	-1.5	8.0
Caring, leisure and other service occupations	31.6	30.1	-1.6	-4.9	-2.0	-10.4
Sales and customer service occupations	11.1	13.2	2.1	18.5	33.3	5.2
Process, plant and machine operatives	96.0	99.7	3.8	3.9	7.9	-11.7
Elementary occupations	37.2	34.8	-2.4	-6.6	0.3	-8.3
All occupations	319.8	345.4	25.6	8.0	13.0	0.0

Source: Institute for Employment Research

3 Recruitment and skills

3.1 Recruitment, hard-to-fill vacancies and skills shortages

3.1.1 2022 results at the organisation level – Survation survey

Table 3.1 Recruitment – Which of the following most applies to your business currently?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
We have many open job vacancies	23.9	23.4	27.3	23.1	30.0	18.9	10.7
We have some open job vacancies	38.5	38.1	36.4	40.5	30.0	49.5	35.7
We have few open job vacancies	15.9	16.3	9.1	16.8	20.0	17.9	17.9
We have no open job vacancies	20.8	21.1	27.3	19.7	20.0	13.7	28.6
Don't know	0.9	1.1	0.0	0.0	0.0	0.0	7.1
N=	226	1016	77	173	20	95	28

Source: Survation survey, December 2022

Table 3.2 Recruitment difficulties – Which of the following is closest to your view?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
We are struggling to fill some of our vacancies	62.7	65.0	75.0	72.7	43.8	65.9	83.3
We are not struggling to fill some of our vacancies	34.5	33.0	23.2	26.6	50.0	32.9	16.7
Don't know	2.8	2.0	1.8	0.7	6.3	1.2	0.0
N=	172	775	56	139	16	82	18

Source: *Survation survey, December 2022*

Table 3.3 Recruitment difficulties – Which types of roles do you find it hardest to fill currently?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Professional/highly skilled specialists	36.9	49.0	52.4	57.4	57.1	31.5	33.3
Technical and skilled support roles	41.4	43.0	35.7	51.5	0.0	53.7	46.7
Managers	32.4	34.8	42.9	29.7	28.6	31.5	26.7
Skilled trades	30.6	30.2	57.1	21.8	0.0	42.6	40.0
Sales & customer service roles	27.9	26.3	14.3	30.7	42.9	25.9	20.0
Elementary roles eg entry-level, administration	21.6	23.7	16.7	25.7	28.6	29.6	20.0
Other	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Don't know	0.0	0.4	0.0	1.0	0.0	0.0	0.0
N=	111	514	42	101	7	54	15

Source: *Survation survey, December 2022*

Table 3.4 Recruitment difficulties – What do you feel are the biggest drivers of recruitment challenges in your business?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Low number of suitable applicants with required skills	48.6	57.2	69.0	47.5	28.6	57.4	46.7
Too much competition from other employers	36.0	40.1	33.3	45.5	28.6	40.7	26.7
Lack of flexibility/hybrid working on offer	38.7	37.2	50.0	37.6	57.1	33.3	40.0
Job entails shift work/unsociable hours	31.5	31.3	31.0	41.6	42.9	18.5	73.3
Not enough interest in the roles	39.6	31.1	35.7	27.7	28.6	33.3	26.7
Other	0.0	0.8	2.4	1.0	0.0	0.0	0.0
Don't know	0.0	0.2	0.0	0.0	0.0	1.9	0.0
N=	111	514	42	101	7	54	15

Source: *Survation survey, December 2022*

3.1.2 2022 results at the organisation level – London Business 1000 survey

Table 3.5 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?

	Local London	London	Construction	Digital & creative	Manufacturing	Distribution & logistics	Public sector (inc. Health & social care)
Pressure to increase wages	41.6	42.5	44.4	42.4	53.8	40.9	32.6
Staff retention	23.5	25.2	23.4	27.5	41.0	16.6	24.0
Skills shortages among job applicants	24.9	24.6	27.5	25.1	32.7	19.7	18.3
Lack of applicants for job vacancies	26.0	24.6	19.7	20.2	30.3	26.1	35.4
The cost and time required to recruit new workers	23.1	24.2	26.0	23.9	20.2	15.0	25.6
Labour market changes following Brexit	20.2	19.7	19.4	17.5	19.6	15.2	25.2
Skills shortages among existing staff	17.7	14.0	14.9	10.6	17.4	16.4	23.3
Tougher immigration controls for non-UK labour	16.4	14.0	14.3	11.6	11.3	11.6	13.3
Managing a remote workforce	14.3	13.8	12.2	17.1	5.5	16.0	10.4
Flexible working arrangements	12.3	13.4	12.8	13.6	8.9	15.0	15.2
Productivity	13.3	13.3	14.2	11.0	21.7	21.1	8.3
Staff ill/ self-isolating because of COVID-19	12.4	10.6	13.3	8.2	11.0	11.0	11.9
Automation	7.5	5.3	7.1	5.0	2.2	6.5	5.3
Other	2.5	2.5	2.8	3.0	-	1.6	1.9
Don't know	6.0	4.8	5.6	3.7	0.3	7.9	6.6
None	10.1	10.3	8.3	12.8	2.1	7.9	11.6
Unweighted N=	221	1,369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

3.1.3 2019 results at the establishment level – Employer Skills Survey

Table 3.6 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 3.7 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
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 3.8 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 etc.	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
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 3.9 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
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 3.10 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 3.11 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 3.12 Technical/practical skills difficult to obtain from applicants by sector, London, 2019

	Construction	Digital & creative	Health & social care	Manufacturing/ Distribution & logistics	All sectors
Computer literacy / basic IT skills	13.9	28.6	30.1	12.6	20.6
Advanced or specialist IT skills	14.1	57.8	22.6	9.1	19.2
Solving complex problems requiring a solution specific to the situation	40.3	69.9	60.2	61.3	47.9
Reading and understanding instructions, guidelines, manuals or reports	53.4	24.6	37.9	47.2	39.7
Writing instructions, guidelines, manuals or reports	39.2	25.3	41.9	15.8	33.3
Basic numerical skills and understanding	31.9	27.6	30.6	39.5	29.7
More complex numerical or statistical skills and understanding	39.0	43.1	24.1	27.9	29.9
Communicating in a foreign language	22.7	9.1	20.8	6.8	20.6
Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	41.0	11.5	10.2	34.7	22.3
Adapting to new equipment or materials	30.2	26.6	18.9	35.8	28.0
Knowledge of products and services offered by your organisation and organisations like yours	46.2	56.5	44.8	55.1	48.3
Knowledge of how your organisation works	41.8	39.3	46.4	33.2	39.9
Specialist skills or knowledge needed to perform the role	85.6	73.4	65.1	57.1	66.0
None of the above	2.5	5.7	10.9	0.0	6.3
Don't know	1.3	5.6	2.6	2.2	6.4
N=	1,800	1,100	1,600	1,200	17,100

Source: Employer Skills Survey 2019

Table 3.13 Soft/people skills difficult to obtain from applicants by sector, London, 2019

	Construction	Digital & creative	Health & social care	Manufacturing/ Distribution & logistics	All sectors
Instructing, teaching or training people	25.1	8.8	24.0	20.0	28.1
Sales skills	25.5	18.8	20.8	16.5	28.2
Customer handling skills	57.4	25.2	39.7	24.0	42.4
Persuading or influencing others	27.3	22.1	39.2	18.5	33.5
Team working	35.4	30.8	50.4	35.0	38.5
Managing or motivating other staff	33.9	29.8	44.3	25.6	36.4
Ability to manage own time and prioritise own tasks	61.4	40.3	55.6	54.4	53.4
Setting objectives for others and planning human, financial and other resources	37.1	45.4	25.1	31.8	30.4
Managing their own feelings, or handling the feelings of others	32.5	27.8	36.5	44.6	37.0
Making speeches or presentations	22.9	21.5	16.5	7.8	22.0
None of the above	19.1	19.4	19.4	21.2	17.5
Don't know	3.3	15.5	5.6	3.6	9.1
N=	1,800	1,100	1,600	1,200	17,100

Source: Employer Skills Survey 2019

3.2 Skills gaps

3.2.1 2022 results at the organisation level – Survation survey

Table 3.14 Skills gaps – thinking about your existing workforce, which of the following applies to your business?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Existing workforce has the skills and capabilities to meet the business needs	70.8	65.6	72.7	68.8	55.0	65.3	75.0
Some gaps in skills and capacity	27.4	31.2	22.1	28.9	40.0	29.5	21.4
Significant gaps in skills and capacity	1.8	3.2	5.2	2.3	5.0	5.3	3.6
N=	226	1,016	77	173	20	95	28

Source: Survation survey, December 2022

Table 3.15 Skills gaps – Which skills or capabilities is your business currently lacking?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Sector specific technical skills	45.5	58.3	57.1	59.3	55.6	42.4	71.4
Cross-cutting transferable skills, such as negotiation and resilience	34.8	42.3	33.3	37.0	33.3	33.3	42.9
Basic digital skills	31.8	32.9	47.6	24.1	55.6	48.5	57.1
Basic maths skills (numerical or statistical skills and understanding)	22.7	22.6	23.8	22.2	11.1	36.4	14.3
English skills (reading and writing)	27.3	20.6	23.8	25.9	22.2	12.1	42.9
Green skills	13.6	20.6	23.8	18.5	0.0	21.2	28.6
Other	0.0	1.4	4.8	0.0	0.0	0.0	0.0
Don't know	4.5	1.1	4.8	0.0	11.1	0.0	0.0
N=	66	350	21	54	9	33	7

Source: *Survation survey, December 2022*

3.2.2 2022 results at the organisation level – London Business 1000 survey

Table 3.16 In which of the following roles, if any, does your business face challenges in terms of skills?

	Local London	London	Construction	Digital & creative	Manufacturing	Distribution & logistics	Public sector (inc. Health & social care)
Skilled manual/ technical roles	38.6	32.3	35.7	28.7	59.0	40.9	23.8
Professional/ managerial roles	28.3	37.5	39.3	44.8	32.5	29.0	36.1
Un/ semi-skilled roles	15.1	12.0	15.5	4.8	20.2	16.8	3.6
Clerical roles	13.5	13.9	16.8	11.4	9.1	20.9	15.2
Don't know	5.4	4.4	4.2	4.7	0.0	6.5	6.7
My business does not face any challenges in terms of skills for any of these roles	31.2	27.2	27.8	26.7	19.3	25.4	35.3
Unweighted N=	221	1,369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

Table 3.17 What are the main types of skills, if any, where your company faces challenges among your current workforce?

	Local London	London	Construction	Digital & creative	Manufacturing	Distribution & logistics	Public sector (inc. Health & social care)
Technical or job-specific skills	32.0	31.1	34.0	36.5	41.0	32.0	14.1
Advanced or specialist IT skills	10.8	16.6	12.3	25.2	8.9	17.6	13.8
Literacy and written communication skills	11.4	10.8	9.3	12.2	8.8	11.6	13.5
Management / interpersonal skills	15.5	17.6	18.3	17.6	19.4	19.6	10.0
Customer and sales skills	18.9	16.6	14.0	11.1	11.3	18.2	18.5
Basic IT skills	12.8	8.6	9.9	5.0	10.7	21.1	11.6
Team working	13.9	13.5	11.5	12.2	26.0	8.3	15.0
Commercial awareness / knowledge of your organisation	16.6	15.3	17.0	12.6	13.5	17.8	12.1
Leadership skills	10.6	16.6	16.5	16.3	23.6	22.9	15.3
Time management skills	10.4	14.0	13.4	13.0	17.4	13.0	6.9
Foreign language skills	5.3	7.0	11.3	5.3	11.2	12.8	1.7
Complex numerical / statistical skills	8.4	9.5	9.1	9.8	4.3	8.1	11.9
Problem solving skills	15.3	16.6	21.1	12.7	26.3	19.5	13.8
Basic numeracy skills	4.2	4.4	7.2	2.7	4.9	4.7	3.3
Other	3.1	2.2	0.7	1.1	2.1	0.0	6.6
Don't know	4.7	3.7	2.1	2.9	-	3.2	16.6
My company does not face any skills challenges	20.9	24.2	29.9	24.1	15.0	22.3	23.7
Unweighted N=	221	1,369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

3.2.3 2019 results at the establishment level – Employer Skills Survey

Table 3.18 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 3.19 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
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Source: Employer Skills Survey 2019

Table 3.20 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 3.21 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 3.22 Occupations with skills gaps by sector, London, 2019

	Constr- uction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics	All sectors
Managers	7.6	24.3	22.0	8.7	26.9	18.6
Professionals	24.9	23.3	10.8	2.7	4.7	11.3
Associate professionals	15.2	15.4	6.4	7.9	6.7	10.1
Administrative/clerical staff	17.3	22.2	39.5	21.4	24.8	27.6
Skilled trades occupations	40.3	4.3	3.9	29.4	6.8	12.8
Caring, leisure and other services staff	0.0	0.0	39.6	0.0	1.9	7.4
Sales and customer services staff	8.6	27.7	6.0	14.2	29.7	26.2
Machine operatives	4.3	1.4	1.0	26.8	18.3	4.6
Elementary staff	3.6	4.0	10.1	28.6	11.6	17.2
N=	3,000	1,400	2,300	1,000	1,100	34,400

Source: Employer Skills Survey 2019

Table 3.23 Technical/practical skills lacking among existing staff by sector, London, 2019

	Constr- uction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics	All sectors
Computer literacy / basic IT skills	31.7	42.1	29.8	11.5	24.0	29.9
Advanced or specialist IT skills	38.1	40.9	29.5	9.9	18.0	25.9
Solving complex problems requiring a solution specific to the situation	62.1	60.8	51.4	28.4	49.8	48.3
Reading and understanding instructions, guidelines, manuals or reports	26.9	32.3	36.1	22.6	37.9	32.3
Writing instructions, guidelines, manuals or reports	28.6	23.9	36.7	15.4	29.6	26.7
Basic numerical skills and understanding	35.4	28.3	20.0	13.5	18.7	24.2
More complex numerical or statistical skills and understanding	39.2	38.6	25.6	10.0	12.7	26.6
Communicating in a foreign language	18.5	14.0	22.2	7.2	18.7	19.9
Manual dexterity – e.g. to mend, repair, assemble, construct or adjust things	26.3	4.1	9.4	9.6	19.6	13.1
Adapting to new equipment or materials	38.8	34.7	32.2	35.0	42.5	31.6
Knowledge of products and services offered by your organisation and organisations like yours	34.7	52.6	41.2	31.7	39.3	46.0
Knowledge of how your organisation works	43.9	47.3	44.8	16.1	47.7	41.8
Specialist skills or knowledge needed to perform the role	51.5	67.5	61.1	44.1	72.3	57.3
None of the above	13.2	9.7	9.6	29.4	8.2	9.4
Don't know	0.9	0.5	0.9	0.0	0.0	1.5

N=	3,000	1,400	2,300	1,000	1,100	34,400
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Source: Employer Skills Survey 2019

Table 3.24 Soft/people skills lacking among existing staff by sector, London, 2019

	Constr- uction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics	All sectors
Instructing, teaching or training people	32.2	29.6	45.0	11.3	22.1	34.8
Sales skills	30.9	30.8	23.5	27.1	9.6	34.6
Customer handling skills	45.2	42.0	42.3	22.2	30.4	48.4
Persuading or influencing others	44.2	36.0	48.7	23.6	33.7	39.5
Team working	34.2	41.9	58.3	33.0	31.7	47.0
Managing or motivating other staff	31.5	39.1	56.8	31.9	24.5	41.1
Ability to manage own time and prioritise own tasks	48.7	56.3	71.3	48.2	64.3	63.1
Setting objectives for others and planning human, financial and other resources	37.1	33.8	33.6	28.7	16.5	32.1
Managing their own feelings, or handling the feelings of others	40.1	44.0	52.3	31.6	31.9	43.9
Making speeches or presentations	21.1	21.6	29.4	8.2	0.0	21.0
None of the above	15.3	21.0	8.9	38.3	18.5	12.3
Don't know	1.4	2.1	3.0	0.0	3.6	1.3
N=	3,000	1,400	2,300	1,000	1,100	34,400

Source: Employer Skills Survey 2019

3.3 Future skills needs

Table 3.25 How confident, if at all, are you that your business understands it's skills needs over the next 2 to 5 years?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Very confident	43.4	39.5	48.1	36.4	25.0	30.5	50.0
Quite confident	49.1	52.4	45.5	58.4	60.0	61.1	42.9
Not that confident	7.1	7.5	6.5	5.2	15.0	8.4	3.6
Not at all confident	0.0	0.4	0.0	0.0	0.0	0.0	3.6
Don't know	0.4	0.3	0.0	0.0	0.0	0.0	0.0
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

Table 3.26 Which skills do you feel your business will need most over the next 2 to 5 years?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Advanced digital skills	51.8	55.9	53.2	58.4	55.0	54.7	60.7
Sector specific technical skills	45.6	49.1	59.7	52.0	25.0	41.1	60.7
Basic digital skills	31.9	33.1	37.7	36.4	30.0	38.9	57.1
Cross-cutting transferable skills, such as negotiation and resilience	23.5	30.5	22.1	28.9	35.0	32.6	32.1
Basic maths skills (numerical or statistical skills and understanding)	26.5	28.8	16.9	28.9	20.0	36.8	21.4
English skills (reading or writing)	17.7	23.2	19.5	28.3	35.0	22.1	10.7
Green skills	20.4	22.9	22.1	24.3	20.0	28.4	14.3
Other	2.7	1.4	3.9	0.0	20.0	3.2	0.0
Don't know	4.0	2.3	3.9	0.6	5.0	7.4	0.0
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

4 Training provision

Table 4.1 Is your business currently engaged with any of the following educational institutions?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Independent training providers	29.2	33.2	40.3	37.6	15.0	38.9	46.4
Universities	36.3	32.4	27.3	32.4	40.0	33.7	32.1
Job Centre Plus or other employment service providers	30.5	30.2	27.3	30.1	30.0	31.6	46.4
We are delivering apprenticeships	21.7	27.1	28.6	34.1	20.0	23.2	21.4
Further Education colleges	21.7	22.8	23.4	22.5	20.0	26.3	28.6
We are delivering T-Levels	18.6	19.0	23.4	21.4	10.0	18.9	25.0
Other	0.9	0.8	0.0	0.0	0.0	0.0	0.0
None	17.3	20.8	23.4	20.8	40.0	14.7	7.1
Don't know	0.9	0.9	1.3	0.0	0.0	1.1	0.0
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

Table 4.2 What are the barriers, if any, to your business engaging with full and part-time training for staff?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Cost of training	42.9	46.8	45.5	42.2	90.0	47.4	50.0
Time available with the business	41.2	41.8	46.8	45.7	45.0	30.5	42.9
Relevance or quality of local training courses	35.4	40.5	48.1	49.1	45.0	38.9	28.6
Knowing where to find the right training	33.2	34.2	33.8	39.3	15.0	31.6	42.9
Location of training	33.6	30.3	35.1	27.2	35.0	29.5	57.1
Other	0.9	0.6	0.0	0.6	0.0	1.1	0.0
Don't know	0.9	1.8	0.0	0.0	0.0	3.2	3.6
We don't have any barriers	7.5	9.1	6.5	9.8	0.0	8.4	3.6
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

Table 4.3 Thinking about your investment in training over the next year, how, if at all, do you think it will change?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
It will increase significantly	30.5	28.7	27.3	31.2	25.0	22.1	42.9
It will increase somewhat	44.7	40.1	40.3	39.9	25.0	42.1	39.3
It will stay the same	18.6	25.2	26.0	22.0	35.0	32.6	14.3
It will decrease significantly	3.5	2.9	5.2	2.3	10.0	2.1	3.6
It will decrease a lot	0.9	2.0	1.3	2.9	0.0	1.1	0.0
Don't know	1.8	1.2	0.0	1.7	5.0	0.0	0.0
NET: Increase (Significantly+Somewhat)	75.2	68.8	67.5	71.1	50.0	64.2	82.1
NET: Decrease (Somewhat+Significantly)	4.4	4.8	6.5	5.2	10.0	3.2	3.6
Net Increase (Increase-Decrease)	70.8	64.0	61.0	65.9	40.0	61.1	78.6
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

Table 4.4 Which, if any, of the following would help you to improve the skills of your workforce the most?

	Local London	London	Construction	Digital & creative	Health & social care	Manufacturing	Distribution & logistics
Greater availability of online training courses and qualifications	47.3	47.0	46.8	49.1	65.0	41.1	53.6
Courses that have been co-designed by employers and providers	38.9	38.0	33.8	37.0	25.0	47.4	28.6
Greater availability of short modular courses and qualifications	40.3	37.5	37.7	39.9	40.0	35.8	35.7
Government skills and employment programmes which are easy to understand	39.4	36.6	40.3	34.7	50.0	36.8	28.6
Tutors that have up to date knowledge of the industry	38.1	35.8	28.6	34.7	40.0	37.9	35.7
A form of tax incentive to off-set the cost of training	31.9	34.4	41.6	35.3	25.0	32.6	42.9
Help with finding a potential training partner	29.2	33.1	31.2	34.7	40.0	33.7	35.7
More responsive local training providers	31.9	30.7	36.4	29.5	15.0	30.5	35.7
Other	2.2	1.0	1.3	0.0	5.0	1.1	0.0
None of the above	3.1	2.0	2.6	0.0	5.0	8.4	0.0
N=	226	1,016	77	173	20	95	28

Source: *Survation survey, December 2022*

Table 4.5 Does your company currently employ any apprentices?

	Local London	London	Construction	Digital and creative	Manufacturing	Distribution and logistics	Public sector (inc. Health & social care)
Yes	18.6	13.6	15.0	10.7	24.8	23.2	17.4
No	79.7	84.7	81.5	87.8	75.1	73.7	82.6
Don't know	1.7	1.7	3.5	1.5	0.1	3.2	0.0
Unweighted N=	221	1369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

Table 4.6 To the best of your knowledge, is your company required to pay the apprenticeship levy?

	Local London	London	Construction	Digital and creative	Manufacturing	Distribution and logistics	Public sector (inc. Health & social care)
Yes	17.7	13.9	16.9	12.7	16.5	16.9	13.6
No	43.4	47.9	48.8	49.2	44.9	42.0	57.4
Don't know	39.0	38.1	34.3	38.1	38.6	41.2	29.0
Unweighted N=	221	1369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

Table 4.7 Does your business plan to use apprenticeship funding over the next 12 months?

	Local London	London	Construction	Digital and creative	Manufacturing	Distribution and logistics	Public sector (inc. Health & social care)
Yes	17.2	14.4	19.8	10.3	12.0	20.0	17.2
No	60.4	63.5	63.9	64.4	64.2	51.4	62.3
Don't know	22.4	22.0	16.3	25.3	23.9	28.6	20.5
Unweighted N=	221	1369	173	408	64	86	86

Source: London Business 1000 survey, July-September 2022

Table 4.8 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 4.9 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 4.10 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 4.11 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 4.12 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=	96,800	39,600	23,300	43,700	203,400	1,340,400

Source: Employer Skills Survey 2019

4.1.1 AEB provision

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 53 per cent of all AEB provision, and 60 per cent of adult skills provision.

Health, public services and care is the next largest subject area for adult skills provision, and is the largest subject area for community learning, accounting for 10 per cent of all provision, which will provide skills for the health and social care sector. Arts, media and publishing is the third largest subject area, accounting for eight per cent of total provision and 28 per cent of community learning provision, and this may provide skills for the digital and creative sector, as will information and communication technology provision which accounts for six per cent of total provision.

Table 4.13 AEB aims enrolments by subject, Local London, 2021/22

	Community learning	Adult skills	All AEB
Health, Public Services and Care	9.4	10.5	10.3
Science and Mathematics	1.1	1.2	1.2
Agriculture, Horticulture and Animal Care	1.4	0.4	0.6
Engineering and Manufacturing Technologies	0.0	1.5	1.2
Construction, Planning and the Built Environment	0.5	3.4	2.8
Information and Communication Technology (ICT)	6.1	6.2	6.2
Retail and Commercial Enterprise	2.9	4.1	3.9
Leisure, Travel and Tourism	3.9	1.0	1.6
Arts, Media and Publishing	28.1	2.4	7.9
History, Philosophy and Theology	5.1	0.0	1.1
Social Sciences	0.4	0.0	0.1
Languages, Literature and Culture	12.5	1.6	3.9
Education and Training	0.6	1.9	1.6
Preparation for Life and Work	26.6	59.9	52.8
Business, Administration, Finance and Law	1.4	5.9	4.9
Total aims enrolments	27,380	101,100	128,470

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

4.1.2 HE provision

The University of Greenwich accounts for just over half of all students in the area, and the University of East London accounts for 34 per cent, while specialist creative and arts providers (Ravensbourne, Trinity Laban and Rose Bruford) account for the rest .

The largest subject areas in the Local London area are business and management (21%), design, and creative and performing arts (18%), and subjects allied to medicine (14%), and all of these subject areas were over-represented in comparison with provision across London. Computing provision was also over-represented in Local London, accounting for 8.3 per cent of total provision compared with 6.1 per cent across London.

Table 4.14 HE student enrolments by subject, Local London and London, 2021/22

	Local London	London
01 Medicine and dentistry	0.0	4.0
02 Subjects allied to medicine	13.7	10.7
03 Biological and sport sciences	4.7	3.4
04 Psychology	5.2	4.1
05 Veterinary sciences	0.0	0.7
06 Agriculture, food and related studies	0.4	0.1
07 Physical sciences	0.9	2.2
09 Mathematical sciences	0.6	2.1
10 Engineering and technology	4.6	6.4
11 Computing	8.3	6.1
13 Architecture, building and planning	3.5	2.3
26 Geography, earth and environmental studies	0.1	0.8
15 Social sciences	7.8	9.6
16 Law	3.5	6.0
17 Business and management	21.2	19.1
19 Language and area studies	1.2	2.4
20 Historical, philosophical and religious studies	0.3	2.6
22 Education and teaching	3.6	1.6
23 Combined and general studies	0.0	0.7
24 Media, journalism and communications	2.3	2.4
25 Design, and creative and performing arts	18.3	12.9
Total students	31,560	286,985

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