

SOUTH WEST

The South West (in this snapshot, including the West of England) is a region with a proud engineering tradition and with great strength in key industries such as automotive and aerospace.

SOUTH WEST



Introduction

In a region with lower than average higher education enrollment – Bristol South is the Parliamentary constituency which sends a lower proportion of young people to university than any other – the advanced manufacturing and engineering (AME) sector provides opportunities for young people to gain skills and to have good careers through non-university routes such as apprenticeships.

Employers are investing in high quality technical education – Airbus sponsors the Bristol University Technical College, for example.

There is still scope for more to be done on apprenticeships in the South West – Bristol and Swindon, the major economic centres of activity, have 10-12 apprenticeship starts per 1,000 working age people, which is lower than comparable parts of the North and Midlands. Developing skills for AME is a key priority within the region and forms part of the West of England Combined Authority's skills plan.

Regional Profile

The South West accounts for 8.4% of the UK population (as of 2017) and has 8.4% of AME employers based within it, plus 10.1% of total UK AME employment.

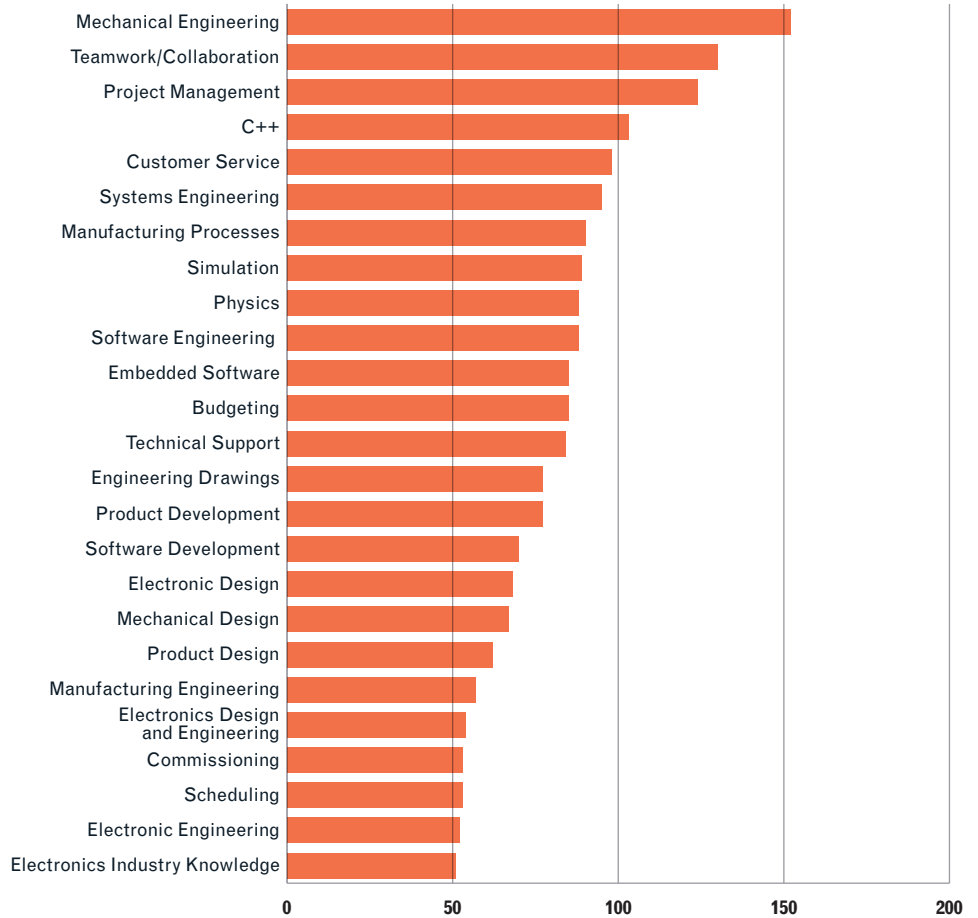
Employer size	Micro (0-9 employees)	Small (10-49 employees)	Medium (50-249 employees)	Large (250+ employees)	Total	As percentage of total
East Midlands	9,920	1,315	325	50	11,610	7.4
East of England	13,905	1,610	400	75	15,990	10.2
London	14,705	995	225	50	15,975	10.2
North East	6,180	535	165	35	6,915	4.4
North West	15,120	1,625	375	75	17,195	10.9
Northern Ireland	2,660	370	85	15	3,130	2
Scotland	14,080	1,085	250	65	15,480	9.9
South East	21,125	2,125	470	125	23,845	15.2
South West	11,575	1,265	270	65	13,175	8.4
Wales	5,120	545	160	35	5,860	3.7
West Midlands	13,620	2,110	525	110	16,365	10.4
Yorkshire and the Humber	9,655	1,435	375	65	11,530	7.3
Total	137,665	15,015	3,625	765	157,070	100
As % of Total	87.6	9.6	2.3	0.5	100	

	2018 Employment in AME
East Midlands	112,377
East of England	139,623
London	102,730
North East	56,051
North West	161,874
Northern Ireland	38,878
Scotland	107,941
South East	189,627
South West	144,903
Wales	79,798
West Midlands	192,956
Yorkshire and Humber	120,346
Grand Total	1,447,103



Demand for Skills

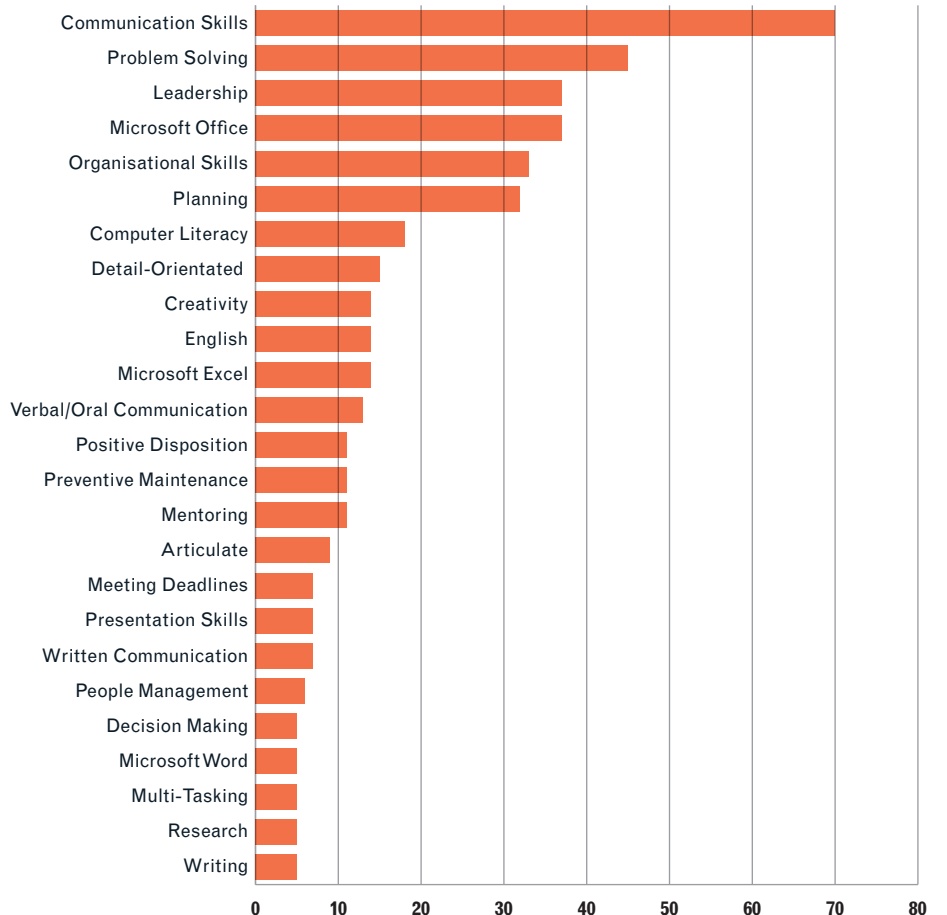
Unlike some other UK regions, the specialist skill most in demand from AME employers (according to Labour Insight analysis of job postings from 2017) is Mechanical Engineering, an engineering-focused skill – although there are non-engineering specific skills on the list too, such as customer service skills.



In common with other UK regions, communication, problem solving and leadership skills are the most in-demand non-specialist skills, with general IT skills such as Microsoft Office and computer literacy also desired.

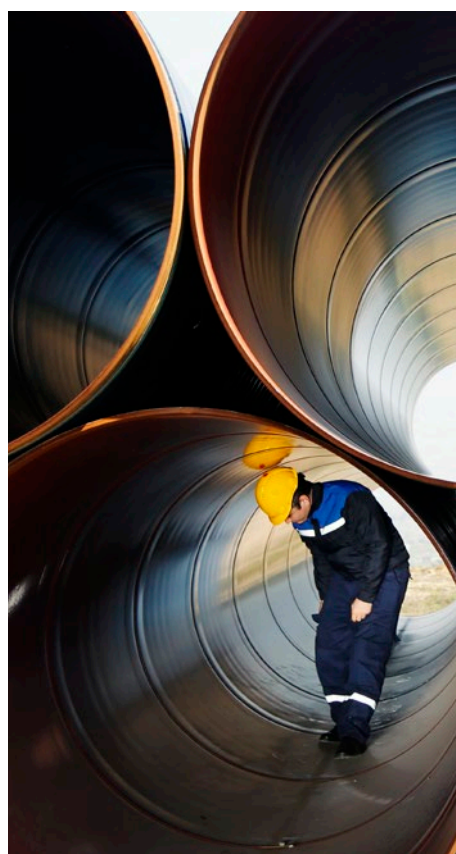
The South West’s AME sector has a lower concentration of workers employed in research than the UK average, and a higher proportion employed in Fabricated Metal Products – a wide-ranging sector which covers the manufacture of all manner of metal goods. The aerospace sector is strong – the region employs more people in this sector than any other UK region, and unlike most other regions there is forecast to be growth by 2023 (with the caveat that these figures are sensitive to the Brexit deal struck between the UK and the EU).

The South West also has relative strength in the Marine sector, with greater employment in this area than any other UK region – the region has a Marine Energy Park to safeguard the sector’s future and a number of key research and development facilities are sited there. Given the region’s length of coastline and number of ports, this is perhaps to be expected.



South West employment by sector (SIC groups)

Sector	South West 2018	South West 2023	2018-23 South West change	2018-23 UK change
Fabricated Metal Products	28,680	26,502	-7.60%	-6.10%
Aerospace	20,008	20,163	0.80%	-3.50%
Engineering design activities for industrial process and production	14,410	14,231	-1.20%	-1.30%
Mechanical Equipment	13,583	10,527	-22.50%	-18.80%
Research and experimental development on natural sciences and engineer	11,043	12,143	10.00%	7.20%
Manufacture of computer, electronic and optical products	9,048	6,741	-25.50%	-21.50%
Electrical Equipment	8,462	7,835	-7.40%	-7.40%
Marine	8,125	8,200	0.90%	-3.50%
Automotive	7,816	6,861	-12.20%	-10.60%
Repair of machinery Installation of industrial machinery and equipment	5,360	6,153	14.80%	0.20%
Technical testing and analysis	4,944	4,892	-1.10%	-1.10%
Other Transport Equipment	2,545	2,572	1.10%	-3.30%
Basic Metals	2,497	2,232	-10.60%	-10.10%
Wholesale of metals and metal ores	2,178	2,092	-3.90%	0.40%
Repair and maintenance of aircraft and spacecraft	1,875	2,140	14.10%	-0.10%
Repair and maintenance of other transport equipment	1,134	1,292	13.90%	-0.30%
Repair of electrical equipment	859	990	15.30%	0.40%
Repair of fabricated metal products, machinery and equipment	795	907	14.10%	-0.20%
Repair and maintenance of ships and boats	726	830	14.30%	0.00%
Repair of electronic and optical equipment	469	540	15.10%	0.30%
Rubber Tyres	347	312	-10.10%	-12.80%
Grand Total	144,903	138,154	-4.70%	-5.50%



Occupations, qualifications and the skills shift

The AME sector in the South West has a plurality of workers in skilled trades occupations – a reflection perhaps of the nature of the sectors which are strong in the region.

The expected medium-term decline in the numbers employed in relatively less-skilled roles mirrors the sectors where there is expected to be a decline in employment.

South West employment by occupational area

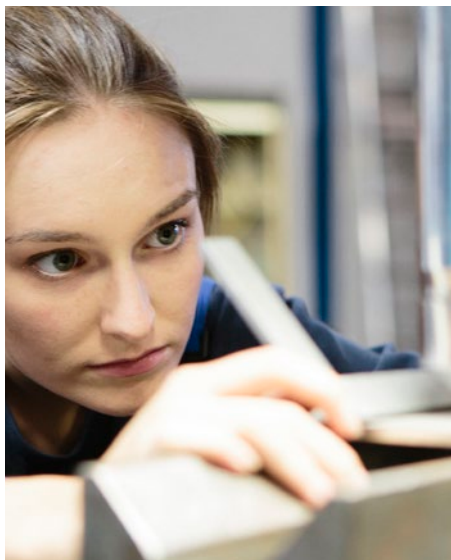
Occupational area	South West 2018	South West 2023	2018-23 South West change	2018-23 UK change
Skilled trades occupations	36,669	33,298	-9.20%	-11.70%
Professional occupations	32,060	32,467	1.30%	0.20%
Associate professional and technical	20,046	19,751	-1.50%	-1.90%
Managers, directors and senior officials	18,551	18,609	0.30%	-0.70%
Process, plant and machine operatives	17,066	14,999	-12.10%	-12.90%
Administrative and secretarial	11,034	10,151	-8.00%	-8.50%
Elementary occupations	4,846	4,373	-9.80%	-9.60%
Sales and customer service	3,376	3,221	-4.60%	-4.20%
Caring, leisure and other service	1,254	1,285	2.50%	2.30%
Grand Total	144,903	138,154	-4.70%	-5.50%

In common with other UK regions, there is expected to be a medium-term decline in the numbers employed with lower-level qualifications and an increase in the numbers who have gone through higher education.

Bristol University is ranked third in the UK for Aeronautical and Manufacturing Engineering degree courses, with Bath ranked fifth; Bristol is ranked first for General Engineering, with Exeter seventh. This strength in higher education offering is undoubtedly a reflection of the region’s industrial profile, with strong employer support for the region’s universities.

South West employment by qualification level

Qualification level	South West 2018	South West 2023	2018-23 South West change	2018-23 UK change
No Qualification	2,805	1,482	-47.2%	-45.8%
QCF1 GCSE(below grade C) & equivalent	15,315	11,459	-25.2%	-21.8%
QCF2 GCSE(A-C) & equivalent	28,977	26,880	-7.2%	-10.3%
QCF3 A level & equivalent	34,690	30,583	-11.8%	-14.9%
QCF4 HE below degree level	14,696	15,141	3.0%	3.2%
QCF5 Foundation degree	5,285	5,695	7.8%	6.4%
QCF6 First degree	31,123	34,375	10.4%	10.2%
QCF7 Other higher degree	9,885	10,311	4.3%	4.0%
QCF8 Doctorate	2,127	2,228	4.7%	2.2%
Grand Total	144,903	138,154	-4.7%	-5.5%



Gender

With 19% of the workforce being female, the South West AME sector is reflective of the sector across the UK when it comes to gender balance.

In common with other parts of the UK, the South West’s large AME employers have made a concerted effort to bring in more female talent and Bristol University is backing the New Model in Technology and Engineering (NMITE) university in Hereford, which is aiming for a gender-balanced intake.

Gender	South West 2018	South West 2023	2018-23 South West change	2018-23 UK change
Females	27,749	27,413	-1.2%	-0.6%
Males	117,153	110,741	-5.5%	-6.7%
Grand Total	144,903	138,154	-4.7%	-5.5%

If you have any queries or need support give our Customer Experience Team a call on **0845 643 9001** or **customerservices@semta.org.uk**

All data correct as of December 2018

