Brighton & Hove Data story to inform the City Employment and Skills Plan 2016-2020

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Brighton & Hove City Council

Introduction

The following slides provide a high level assessment of Brighton & Hove's labour market as at June 2016. They are intended to provide

- insights on patterns of economic activity,
- evidence to inform the priorities of the plan and
- a baseline from which the impact of the plan can be measured

Some of the data has been sourced directly from nationally available data sources (NOMIS) as well as from recently published research such as the Coast to Capital Economic Assessment. Data has also been provided directly from Brighton & Hove City Council.

Data has been presented at different geographic levels to enable comparison with Brighton & Hove and demonstrate its distinctiveness, however this has depended on the availability of data at administrative levels.

The slides are broken down as follows

- Employment and unemployment in the City (Slides 3 – 28) – please note slides 26-28 replace previous slide
- Skills and growth (Slides 30 – 49) – please note slides 44-49 are new UKCES data
- Young people and apprenticeships(50– 61) – please note that 2015 data for slides 56/57 is not available these slides have been kept in for decision on inclusion
- List of data sources (62)

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Employment and unemployment in the City

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1. Unemployment and furthest from the labour market - Summary

Trends

- Brighton & Hove's unemployment has been reducing and now those receiving Job Seekers Allowance (JSA) is less than 3,000 (2870) over 50% less than the number claiming JSA back in 2010 (6220). This is a consistent trend across the UK and is attributed to an improved economy as well as some of the impacts from welfare reform. JSA rates are slightly higher than the Coast to Capital region.
- However the rate of this reduction has been greater for younger people (16-24) and those aged 25-49, the rate of change for 50-64 age group has been much less suggesting that the older age group may be facing a greater challenge accessing work.
- There are 240 long term unemployed (2 year's plus) claiming JSA of which 71% are male compared to females and over 25% of that group (70) have been unemployed for longer than five years.
- The numbers of residents on Employment Support Allowance (ESA) are just over three times that of those on JSA. This is a consistent national trend and highlights why the Government will be focusing its investment on employment programmes post Work Programme that support this group.

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1. Unemployment and furthest from the labour market - Summary

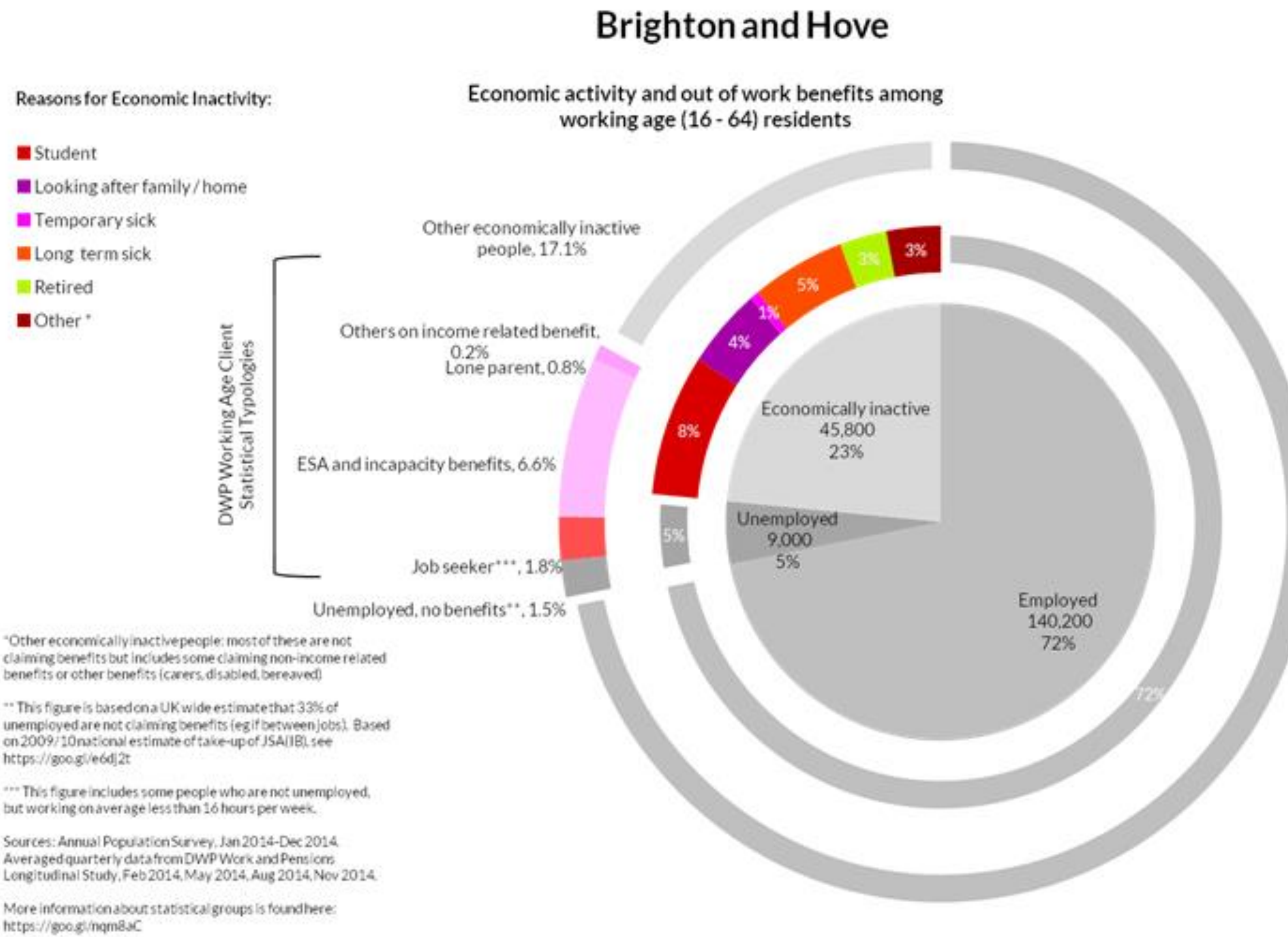
- Of those on ESA, a vast majority are ESA Support Group (7460) those that currently can volunteer to be part of a Government back to work programme rather than in the Work Related Activity Group (WRAG) (2530), those that are mandated to it.
- However when combining long term sick, temporary sick and ESA/incapacity benefit figures, 12.6% of the population of the City are presenting health issues. This has implications for health and adult social care services and how, in the longer term, the City may need to manage demands on services as older people move from ESA at 65 onto other services.

Implications for the CESP

There is a positive story overall around unemployment however it will be important to ensure that this is maintained and measures taken to make further reductions over the coming four years and targeting older age groups (50+) and the long term unemployed.

Data on the profile of current ESA claimants as a whole is not available at this time but will be needed to enable improved planning of services. According to JCP over 70% of ESA Claimants in the City are over 50.Focusing efforts and funding around the ESA WRAG/JSA 2 year plus cohort makes sense in the context of the new Work and Health Programme but needs to align with the level of involvement the City and its partners want to have in supporting this group.

1.1 Profile of economic activity and out of work benefits (16-64) in the City



There is a higher proportion of individuals on ESA than JSA; this is consistent with the rest of the UK. Overall unemployment and economic inactivity is relatively low in Brighton & Hove. The higher proportion of ESA than JSA will be impacted by the fact that unemployment is so low. Most of these ESA clients are ESA support (7460) rather than ESA WRAG (2530) (Not including those in the assessment phase).

Source: NOMIS annual population survey – economic activity

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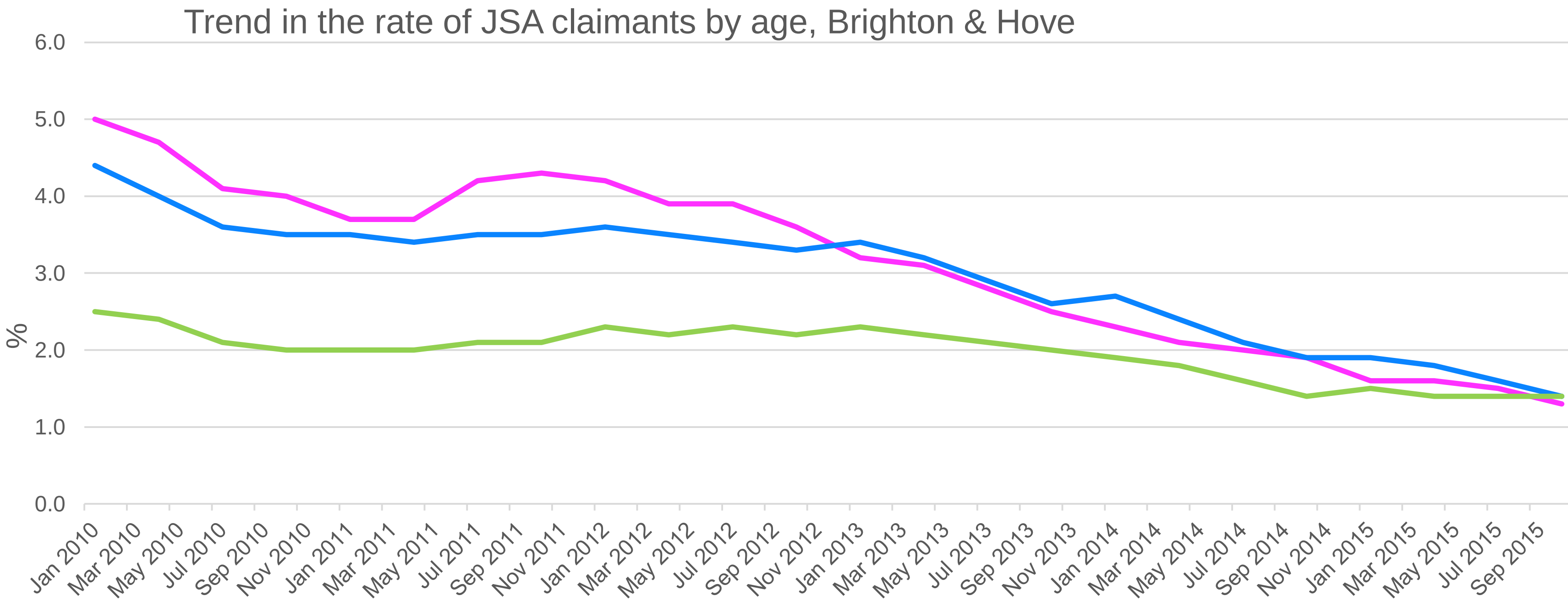
1.2 The rate of Jobseeker's Allowance claimants has been falling in Brighton & Hove since 2010 but less of an impact on the older age group



	Jan 2010	Apr 2010	Jul 2010	Oct 2010	Jan 2011	Apr 2011	Jul 2011	Oct 2011	Jan 2012	Apr 2012	Jul 2012	Oct 2012	Jan 2013	Apr 2013	Jul 2013	Oct 2013	Jan 2014	Apr 2014	Jul 2014	Oct 2014	Jan 2015	Apr 2015	Jul 2015	Oct 2015
Aged 16-24	5.0	4.7	4.1	4.0	3.7	3.7	4.2	4.3	4.2	3.9	3.9	3.6	3.2	3.1	2.8	2.5	2.3	2.1	2.0	1.9	1.6	1.6	1.5	1.3
Aged 25-49	4.4	4.0	3.6	3.5	3.5	3.4	3.5	3.5	3.6	3.5	3.4	3.3	3.4	3.2	2.9	2.6	2.7	2.4	2.1	1.9	1.9	1.8	1.6	1.4
Aged 50-64	2.5	2.4	2.1	2.0	2.0	2.0	2.1	2.1	2.3	2.2	2.3	2.2	2.3	2.2	2.1	2.0	1.9	1.8	1.6	1.4	1.5	1.4	1.4	1.4

The falling rate of JSA claimants has been less for the older age group (29%) compared with 61% for those aged 16 to 24 and 56% for those aged 25-49. Despite absolute numbers being lower than other age groups previously (although now aligned), this rate of change suggests that there are challenges in helping older claimants and efforts should be made to support this group.

Source: NOMIS - Jobseeker's Allowance by age and duration with proportions

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1.2a Jobseekers allowance data tables

JSA clients at May 2010	All	16-24	25-49	50-65
All	6,220	1,540	3,810	860
Males	4,320	1,020	2,690	600
Female	1,910	520	1,120	250
White	5270	1310	3200	750
Ethnic Minority	510	120	300	0

JSA clients at May 2015	All	16-24	25-49	50-65
All	2,870	600	1,660	610
Males	1,840	380	1,040	410
Female	1,030	220	620	200
White	2440	520	1400	520
Ethnic Minority	320	40	160	20

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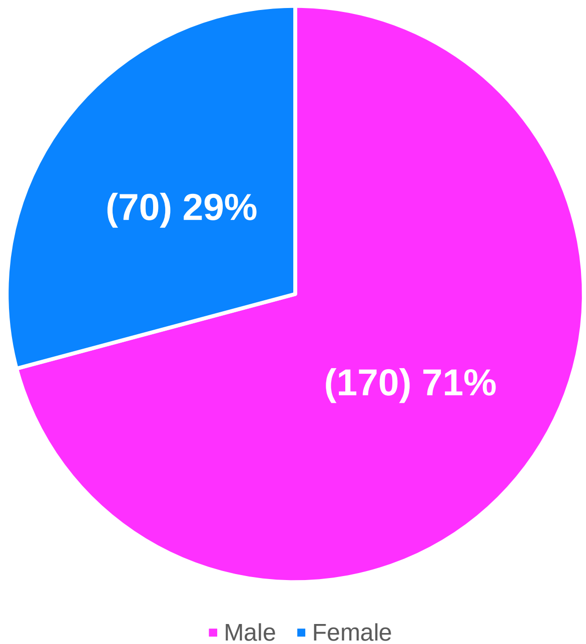
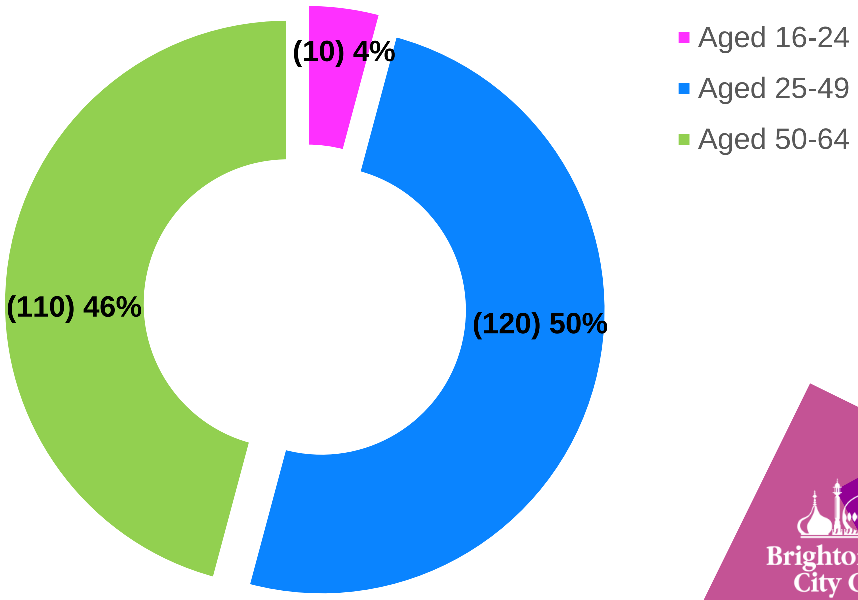
1.3 Over 70% of JSA claimants 2 years plus are male

Long term unemployed in Brighton & Hove - 2 years plus



36% of those on JSA for longer than five years as a proportion of the total are in the 50-64 age group. Although the number is relatively small (40) it will be important to target support to enable this group to move into work. Long term unemployment is predominantly a male issue (71% on JSA compared with 56% on ESA) which is consistent with national figures and suggests a need to make efforts to target support relevant to this client group.

Age profile of JSA Claimants 2 years plus



Source: NOMIS - Jobseeker's Allowance by age and duration with proportions

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1.4.1 Explanation of different ESA groups

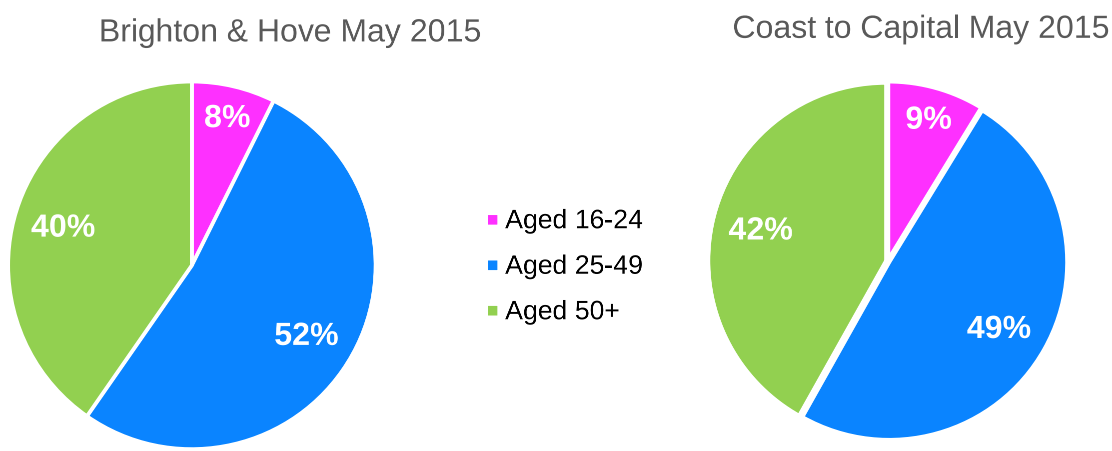
Contributions-based ESA: claimants are eligible if they have paid enough NI contributions in certain years, awards are not affected by savings. Payment of contributions-based ESA is limited to 12 months

Income-based ESA: means tested – claimants are not eligible if savings or capital total £16,000 or more, can be paid alone or as a top-up to contributions-based ESA (if claimant is eligible). Not time limited.

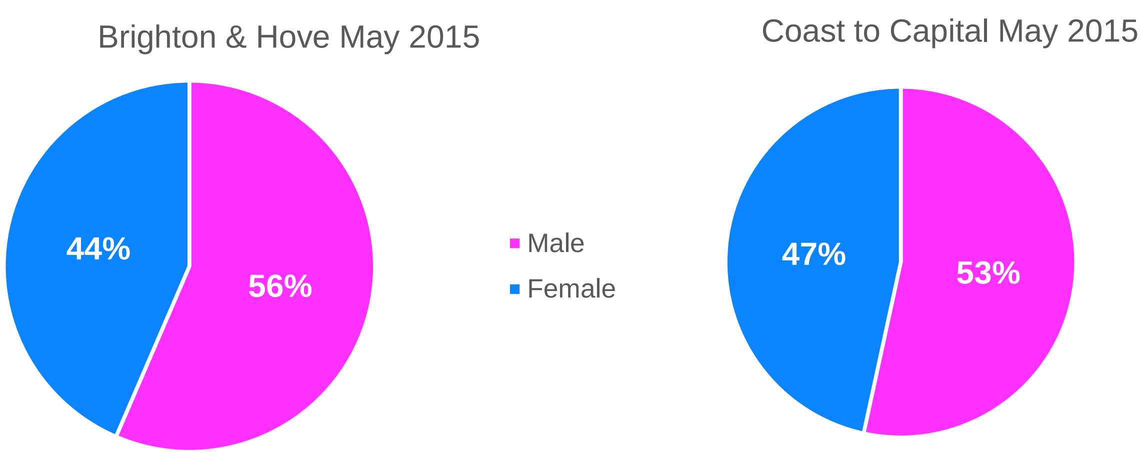
ESA Work-related activity group (WRAG): For claimants who are found to have limited capacity for work-related activities, a lower level of ESA is received and strict work-related conditions must be adhered to. Includes attending work-focused interviews and possibly take part in 'work-related activity'. Claimants are not required to apply for a job.

1.5 Some slight differences around age and gender for those on ESA in Brighton & Hove compared to other areas

ESA Claimants broken down by age



ESA Claimants broken down by gender



These figures show that whilst there are some differences in age and gender Brighton is not unique in terms of its ESA profile. However there are slightly more males than females on ESA in Brighton & Hove aged 25-49 than the Coast to Capital area.

Source: NOMIS benefit claimants – employment and support allowance

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2. Employment and pay – Summary

Trends

- The employment rate for Brighton & Hove is less than that seen in Greater Brighton and Coast to Capital, with a recent decline in the past year.
- The ethnic minority employment rate is lowest in Brighton & Hove compared to other areas and has been consistently lower over the past four years. It currently stands at over 5% less than the England average.
- The employment rate for Young People (16-24) is lower compared to other areas, with the greatest gap affecting young females (16-24) when comparing Brighton & Hove to the Greater Brighton and Coast to Capital areas.
- Self employment has been rising since 2009 although there is some volatility - there was a peak for women and drop for men in 2013. Male self-employment is at its highest since 2005, suggesting that the past ten years (which would have included the recession) have been challenging for those in self-employment.

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2. Employment and pay – Summary

- Brighton & Hove has strong travel to work relationships with Greater London, its Greater Brighton partners and with Gatwick Diamond and East Sussex economic partnerships. It suffers a 'drain' of workers aged 25-49.

- Current vacancy data suggests from the UKCS 2015 survey shows that there has been a slight increase in reported vacancies since the last UKCES employer survey in 2013.

Implications for the CESP

Evidence suggests that there are issues specific to Brighton & Hove in relation to employment in terms of disadvantage around ethnic minorities, pay and gender differences. The plan will need to reflect an ambition where the City performs at least as well as its neighbours in the Greater Brighton area and reduces the impact of disadvantage for both residents and workers, particularly those on ESA and the long term unemployed and the low-waged.

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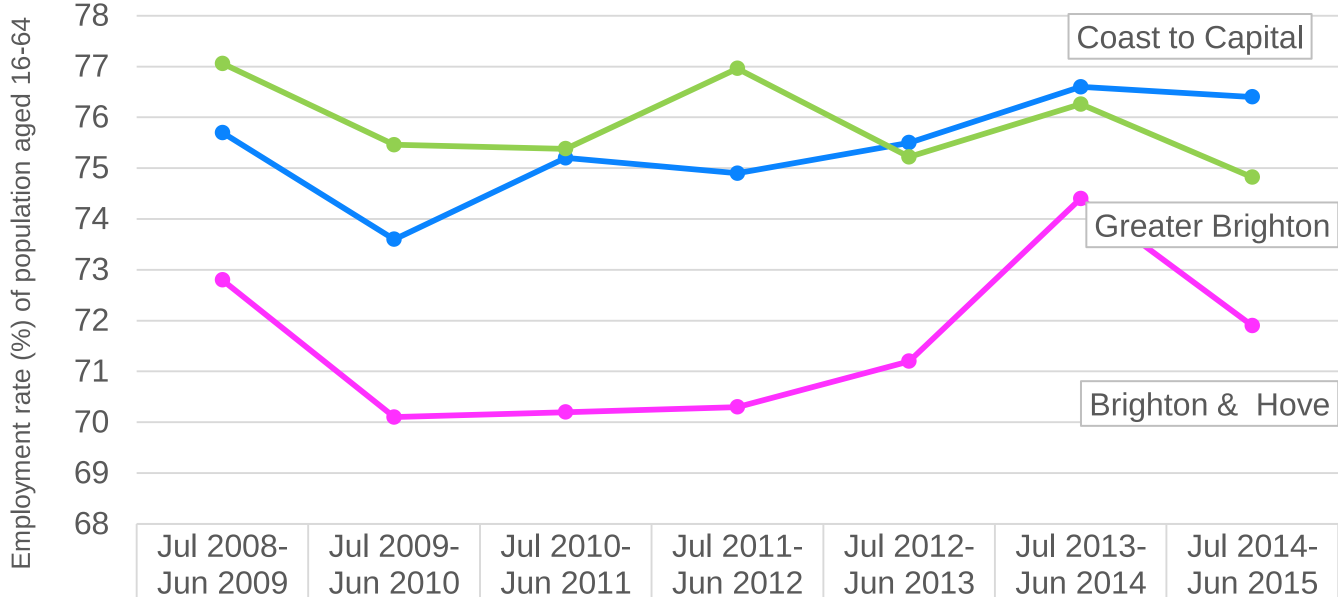
2.1a A changing employment rate in the City?



	Jul 2008-Jun 2009	Jul 2009-Jun 2010	Jul 2010-Jun 2011	Jul 2011-Jun 2012	Jul 2012-Jun 2013	Jul 2013-Jun 2014	Jul 2014-Jun 2015
Employment rate - aged 16-64 - Brighton and Hove	72.8	70.1	70.2	70.3	71.2	74.4	71.9
Employment rate - aged 16-64 - Coast to Capital	75.7	73.6	75.2	74.9	75.5	76.6	76.4
Employment rate - aged 16-64 - Greater Brighton	77.06	75.46	75.38	76.96	75.22	76.26	74.82

The Employment Rate for the City was below both Coast to Capital and Greater Brighton regions during the first three years of the previous CESP. It increased in 2013/14 (to a level near that in 2008/9), but reduced again in 2014/15. This suggests that there is some volatility in employment in the City and that the rate is consistently worse compared to Greater Brighton (greatest divergence in 2011/12).

Source: NOMIS annual population survey

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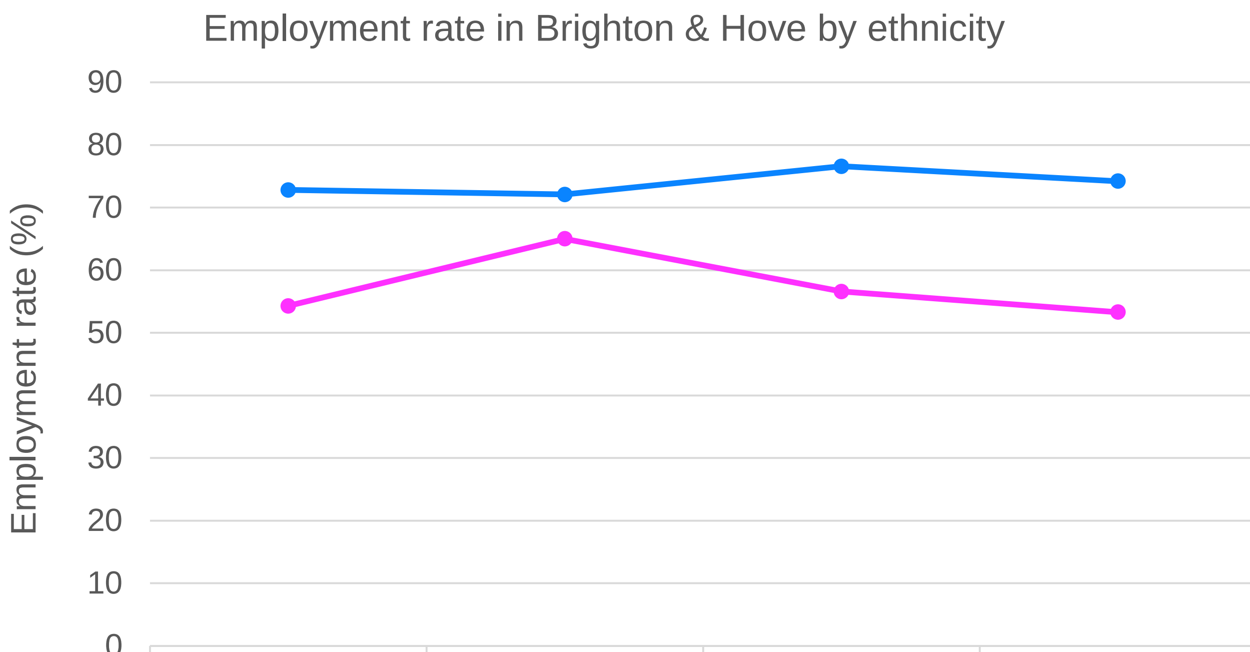
2.1b Ethnic minority employment trends



	Jul 2011-Jun 2012	Jul 2012-Jun 2013	Jul 2013-Jun 2014	Jul 2014-Jun 2015
Brighton and Hove - aged 16-64 employment rate - ethnic minority	54.3	65	56.6	53.3
Brighton and Hove - aged 16-64 employment rate - white	72.8	72.1	76.6	74.2

The Employment Rate for ethnic minorities compared to White is lower. Although this appeared to improve in 2012/13, the rate is lowering to the level seen in 2011/12 and below the current England average of 62.1%.

Source: NOMIS annual population survey

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2.2 Areas differences in employment rates

Ratio of employment rate in Brighton & Hove compared to Greater Brighton and Coast to Capital

Employment rates – ratio of Brighton & Hove to **Greater Brighton**, June 2015

	All 16- 64	16- 24	25- 49	49- 65
All	0.96	0.78	0.96	1.04
Males	0.97	0.94	0.97	0.96
Females	0.95	0.67	0.93	1.13
White	0.98			
Ethnic minorities	0.82			

Employment rates – ratio of Brighton & Hove to **Coast to Capital**, June 2015

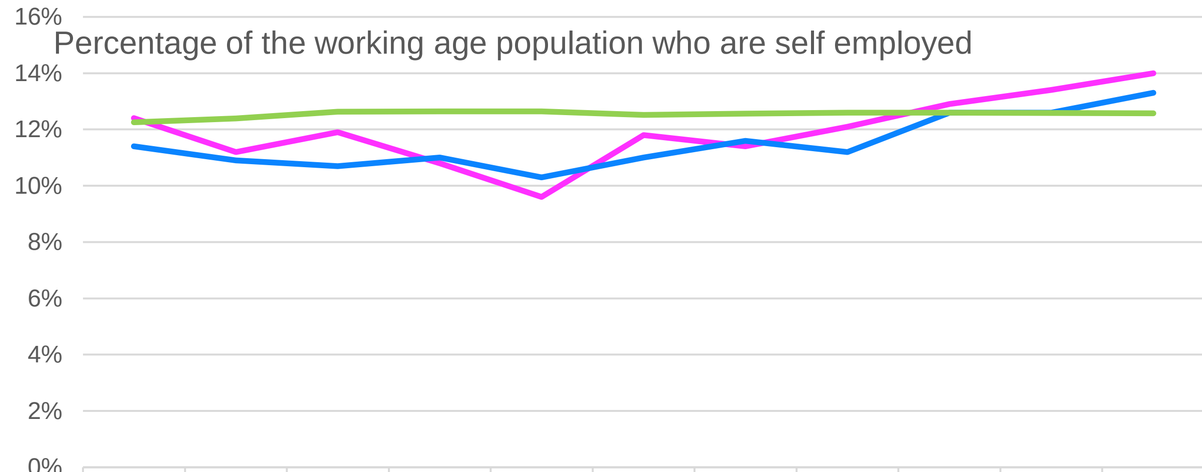
	All 16- 64	16- 24	25- 49	49- 65
All	0.94	0.77	0.97	0.97
Males	0.92	0.79	0.96	0.90
Females	0.96	0.75	0.97	1.06
White	0.95			
Ethnic Minorities	0.80			

These tables compare the employment rates in Brighton & Hove across different groups, with those in Greater Brighton and Coast to Capital. Any number below 1 indicates that the employment rate is lower in Brighton & Hove than in the comparison area. The lower the ratio, the larger the gap. This is illustrated by a darker shade.

The figures show that in most cases the employment rate for Brighton & Hove is lower across sex, age and ethnicity compared to Greater Brighton and Coast to Capital. The greatest gap in employment rates are for the 16-24 age group and probably explained by this group being more likely to study full time particularly for those within the Raising Participation Age; females show the greatest gap in this age range. However the ethnic minority rate is lower in both areas suggesting that there are specific issues around ethnic minority employment in Brighton & Hove.

Source: NOMIS annual population survey

2.3 Self employment has risen modestly since 2009



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Brighton and Hove	12%	11%	12%	11%	10%	12%	11%	12%	13%	13%	14%
Coast to Capital	11%	11%	11%	11%	10%	11%	12%	11%	13%	13%	13%
Greater Brighton	12%	12%	13%	13%	13%	13%	13%	13%	13%	13%	13%

Self employment in Brighton is slightly higher than Greater Brighton and Coast to Capital and has risen by nearly 5% since 2009.

However there are gaps between male and female participation in Brighton, although both have recently increased.

Self employment is seen as a potential opportunity for individuals on JSA/ESA as an alternative to traditional employment particularly when individuals need flexibility around their hours or type of employment.

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
males	0.233	0.206	0.208	0.188	0.175	0.22	0.205	0.218	0.202	0.229	0.235
females	0.097	0.088	0.122	0.104	0.084	0.112	0.117	0.118	0.158	0.126	0.15

Source: NOMIS annual population survey

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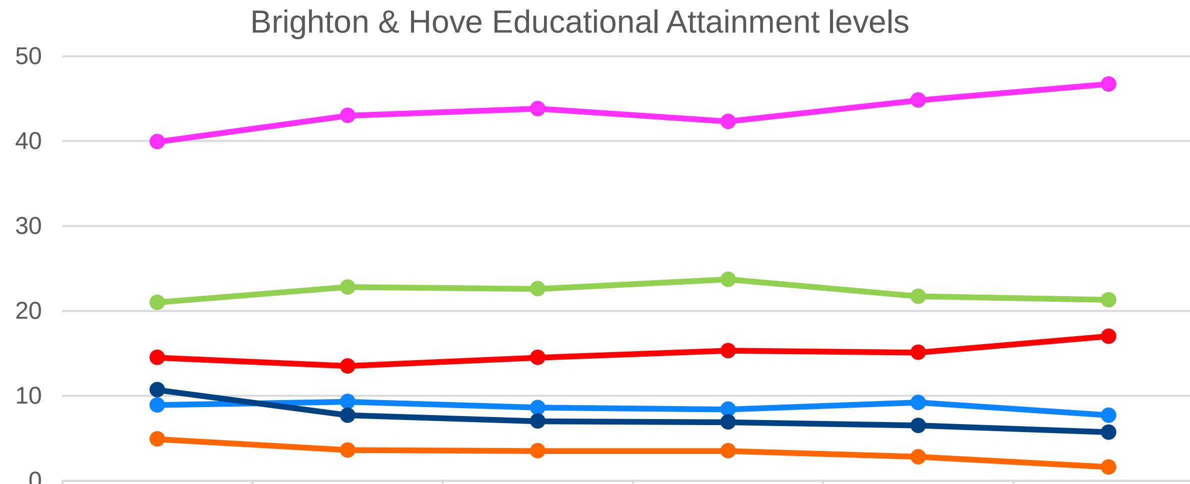
2.4.1 As a University city Brighton & Hove has high rates of economic activity of the population with a degree level or above

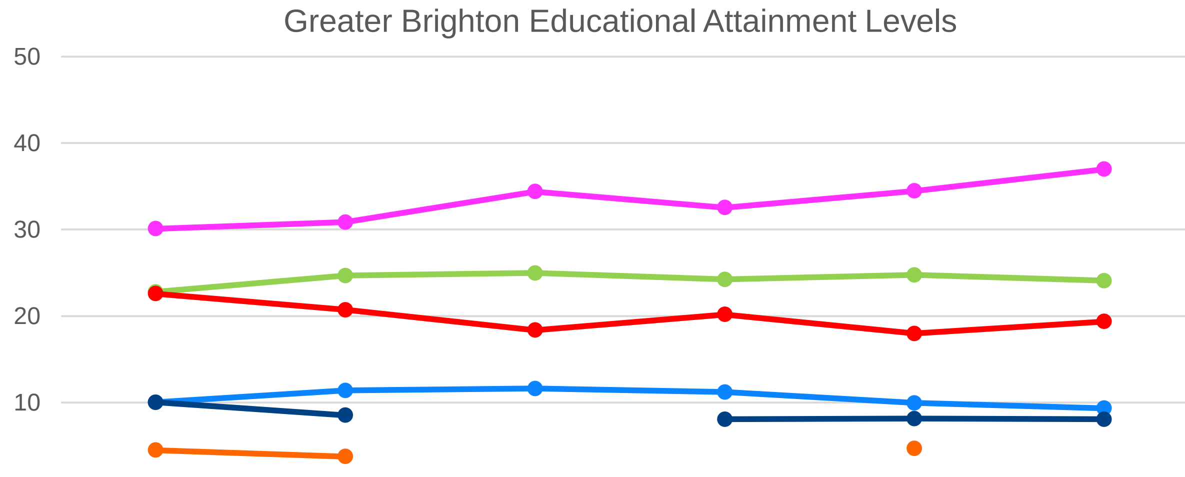


	2009	2010	2011	2012	2013	2014
% of economically active with degree or equivalent and above - aged 16-64	39.9	43	43.8	42.3	44.8	46.7
% of economically active with higher education below degree level - aged 16-64	8.9	9.3	8.6	8.4	9.2	7.7
% of economically active with GCE A level or equivalent - aged 16-64	21	22.8	22.6	23.7	21.7	21.3
% of economically active with GCSE grades A-C or equivalent - aged 16-64	14.5	13.5	14.5	15.3	15.1	17
% of economically active with other qualifications (GCSE) - aged 16-64	10.7	7.7	7	6.9	6.5	5.7
% of economically active with no qualifications (GCSE) - aged 16-64	4.9	3.6	3.5	3.5	2.8	1.6

This graph shows that the percentage of economically active individuals with a degree or equivalent has increased from 39.9% in 2009 to 46.7% in 2014. Over the same period the percentage of economically active individuals with no qualifications has decreased from 4.9% in 2009 to 1.6% in 2014, reinforcing the suggestion that Brighton's population is becoming increasingly highly educated.

Source: NOMIS Annual Population Survey

2.41 Greater Brighton is also experiencing an increase in economic activity of those with a degree or above



	2009	2010	2011	2012	2013	2014
% of economically active with degree or equivalent and above - aged 16-64	30.09	30.85	34.40	32.55	34.47	36.97
% of economically active with higher education below degree level - aged 16-64	10.02	11.40	11.61	11.21	9.96	9.34
% of economically active with GCE A level or equivalent - aged 16-64	22.79	24.67	24.98	24.23	24.75	24.09
% of economically active with GCSE grades A-C or equivalent - aged 16-64	22.58	20.71	18.37	20.19	17.97	19.37
% of economically active with other qualifications (GCSE) - aged 16-64	10.02	8.53		8.06	8.13	8.07
% of economically active with no qualifications (GCSE) - aged 16-64	4.50	3.75			4.69	

Greater Brighton is similarly seeing an increase in those who have a degree of equivalent, with an increase from 30.1% in 2009 to 37.0% in 2014.

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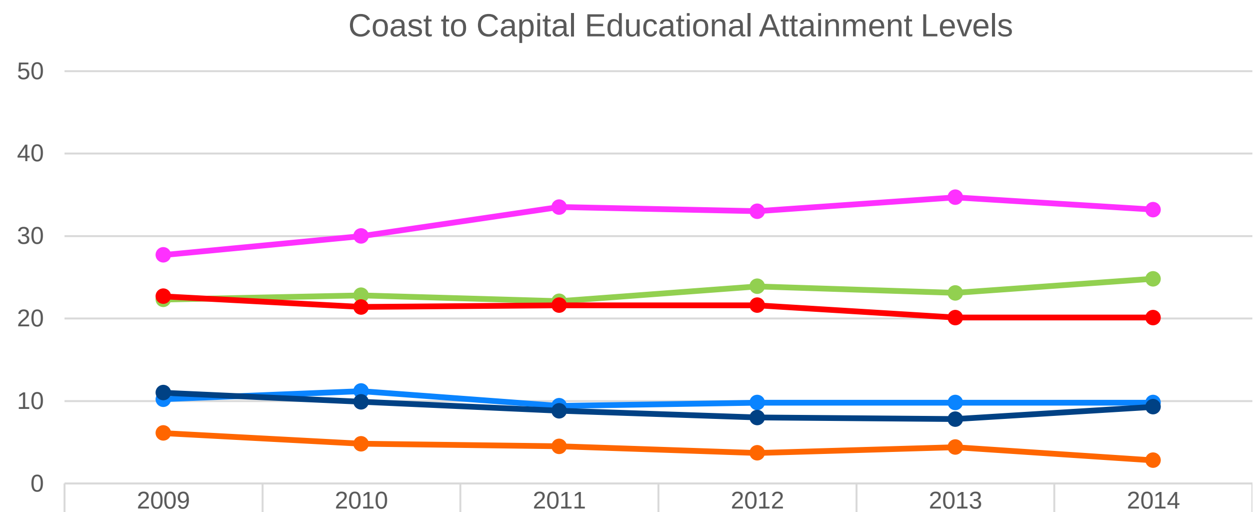
2.42 Brighton & Hove has a smaller economically active population with GCSE Grades A-C or equivalent compared to Coast to Capital



	2009	2010	2011	2012	2013	2014
% of economically active with degree or equivalent and above - aged 16-64	27.7	30	33.5	33	34.7	33.2
% of economically active with higher education below degree level - aged 16-64	10.2	11.2	9.4	9.8	9.8	9.8
% of economically active with GCE A level or equivalent - aged 16-64	22.3	22.8	22.1	23.9	23.1	24.8
% of economically active with GCSE grades A-C or equivalent - aged 16-64	22.7	21.4	21.6	21.6	20.1	20.1
% of economically active with other qualifications (GCSE) - aged 16-64	11	9.9	8.8	8	7.8	9.3
% of economically active with no qualifications (GCSE) - aged 16-64	6.1	4.8	4.5	3.7	4.4	2.8

Comparing educational levels with Greater Brighton and Coast to Capital, Brighton & Hove has a lower economically active population with GCSE Grades A-C or equivalent. Graduate retention increased between 2014 and 15 in the Coast to Capital area with Brighton & Hove being the most common place to settle (16% of graduates) and has had an increase in graduate retention of 1.6%. Brighton & Hove has moved ahead of Greater London for attracting STEM graduates.

Source: NOMIS Annual Population Survey

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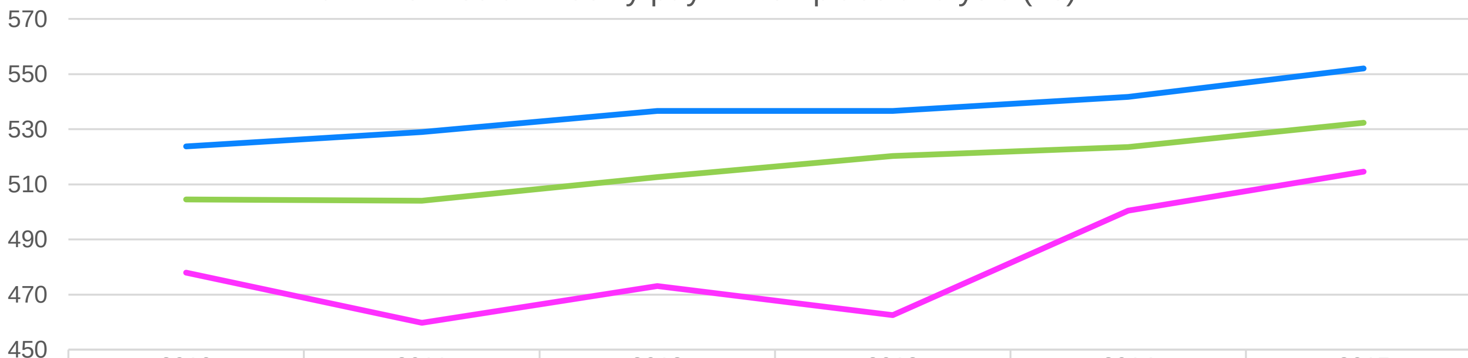
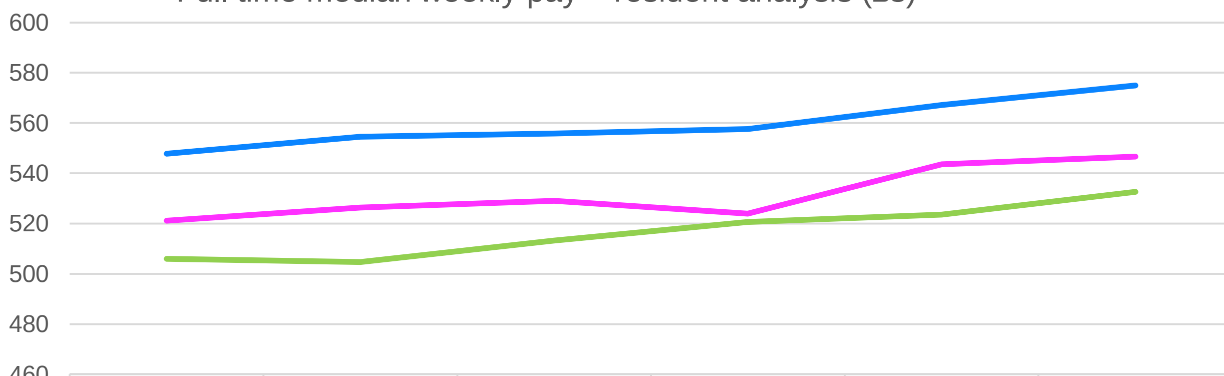
2.5.1 There are differences in weekly pay for workers and residents and also between genders

Full-time median weekly pay – Workplace analysis (£s)



	2010	2011	2012	2013	2014	2015
Brighton and Hove	478.0	459.8	473.1	462.5	500.5	514.6
South East	523.8	529.0	536.6	536.6	541.7	552.1
England	504.5	504.0	512.6	520.3	523.5	532.4

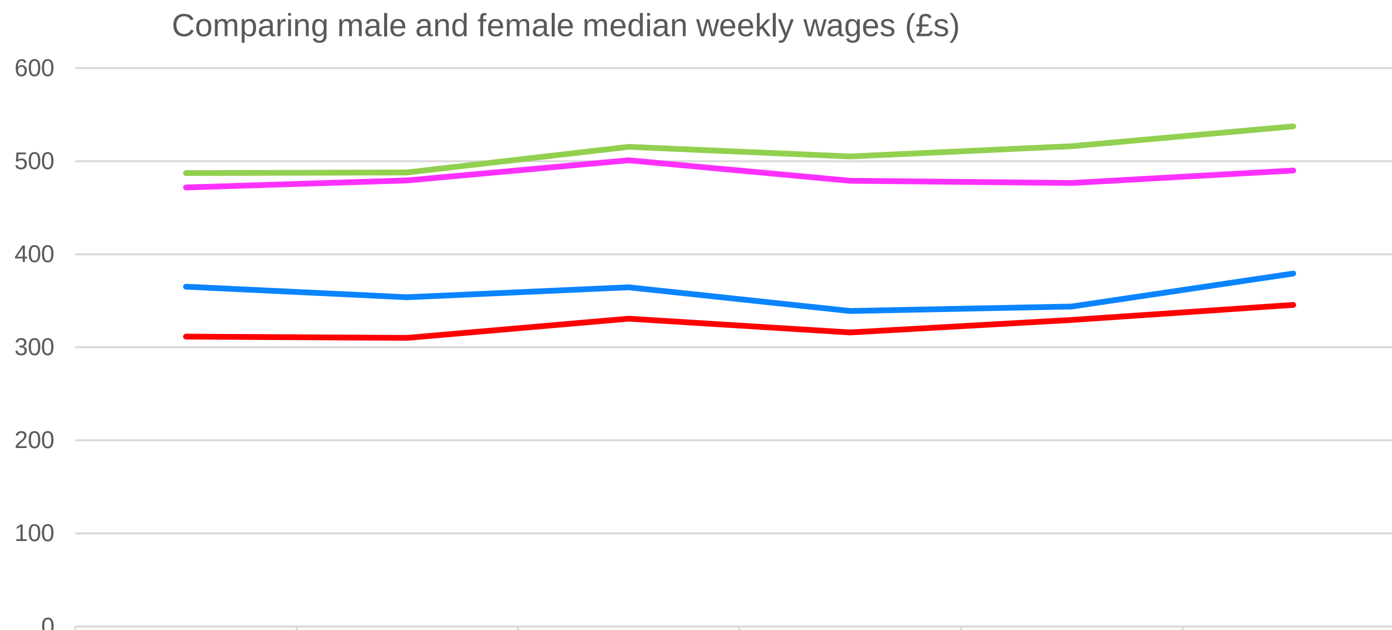
Full time median weekly pay – resident analysis (£s)



	2010	2011	2012	2013	2014	2015
Brighton and Hove	521.1	526.4	529.1	523.9	543.6	546.6
South East	547.8	554.6	555.8	557.6	567.2	574.9
England	506.0	504.7	513.2	520.6	523.6	532.6

Source: NOMIS annual survey of hours and earnings

2.5.2 Some of the differences in pay may reflect whether work is full time or part time



	2010	2011	2012	2013	2014	2015
Brighton and Hove males	471.7	479.3	501.1	479.1	476.7	489.8
Brighton and Hove females	365.2	353.7	364.4	339.0	343.7	379.2
Greater Brighton males	487.4	487.9	515.4	505.1	516.0	537.3
Greater Brighton females	311.4	310.0	330.9	315.8	329.3	345.6

Some of the differences in pay reflect issues around part time and full time work – certainly between men and women and the types of jobs held by residents in the City versus those that commute into Brighton & Hove. Nevertheless there are likely to be issues around affordability "Rents for new lets have been increasing at between 5 and 10% a year over the last four years. Housing benefit rates are already significantly lower than the average cost of new rents in the city. Reduction of the benefit cap to £20k in Autumn 2016 which is currently forecast to affect approximately 600 families" (John Francis – Welfare Reform team)

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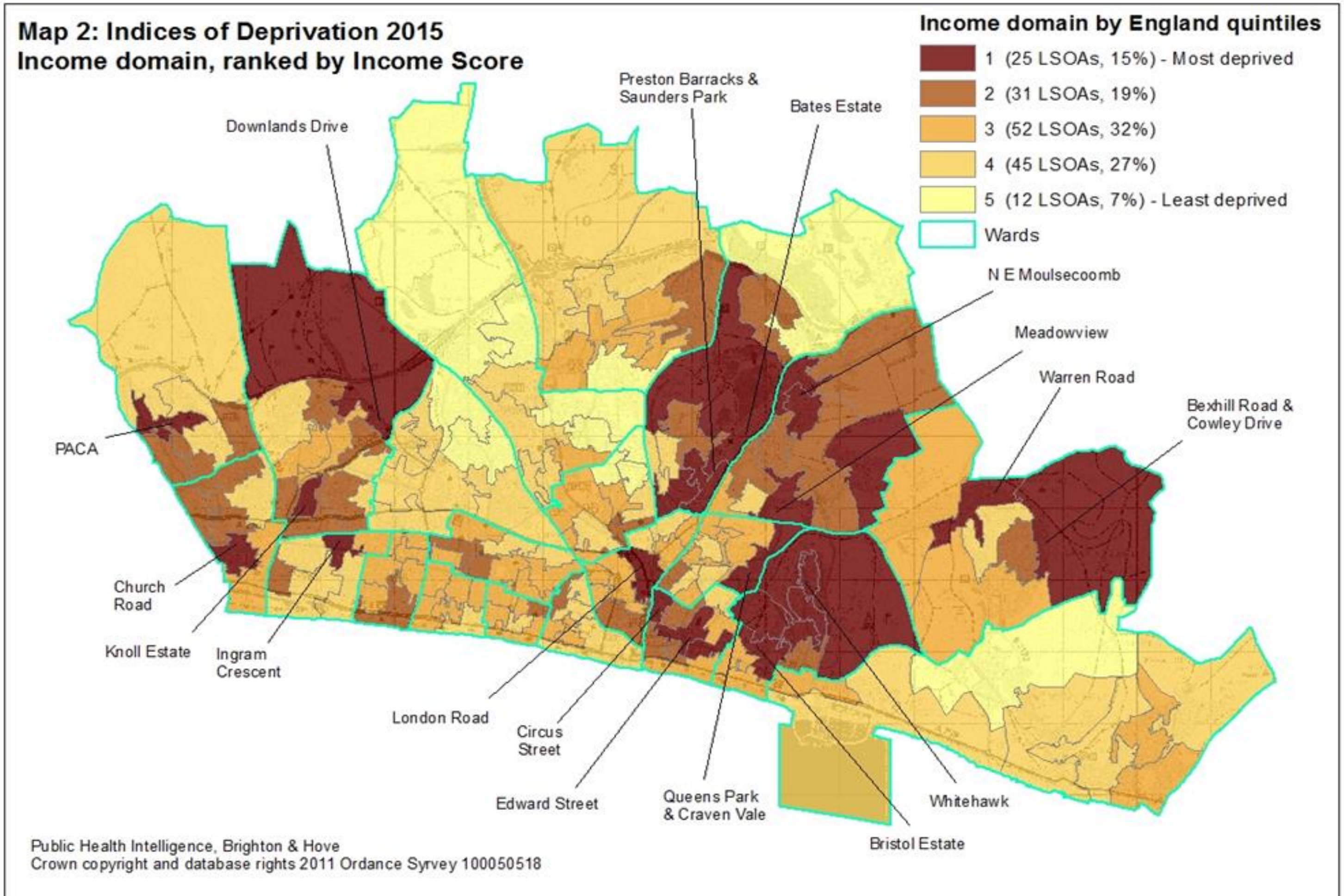
2.6 Geography of income deprivation



Despite higher rates of pay for residents as an average, this masks a pattern of income deprivation for particular wards across the city where there are 25 LSOAs in the 15 most deprived within the Income Domain. This will require targeted support for those households, that through employment and improved pay, can help to address income inequality in the City.

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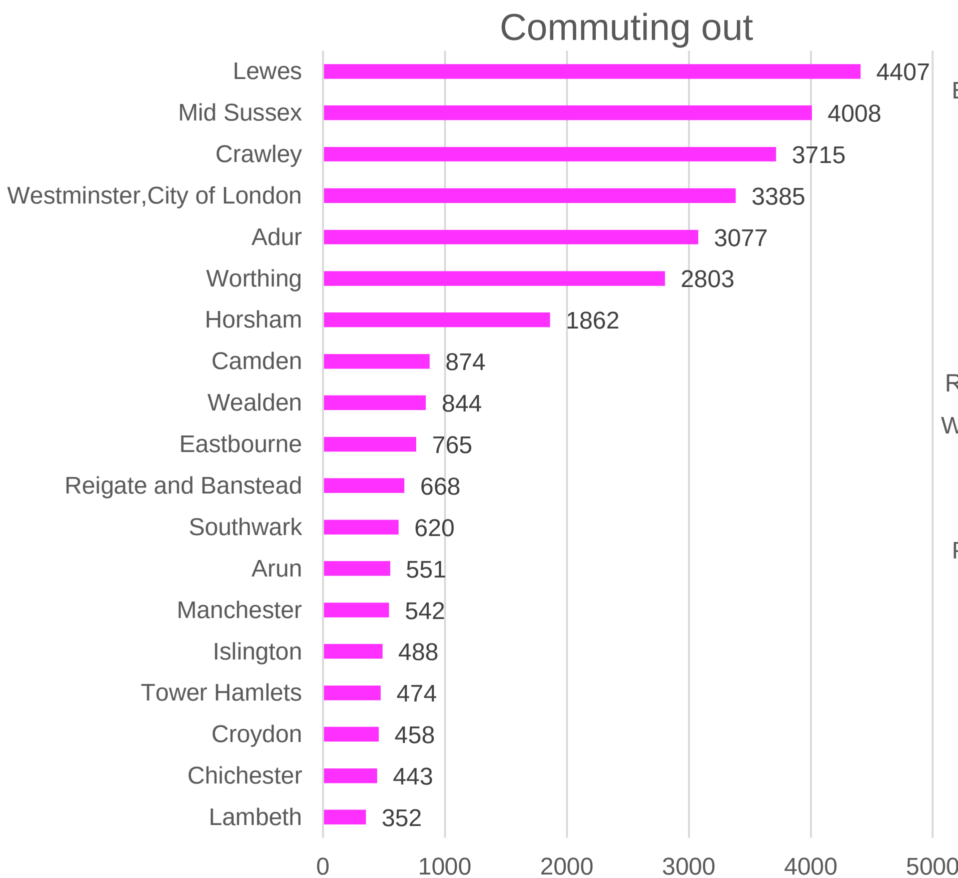
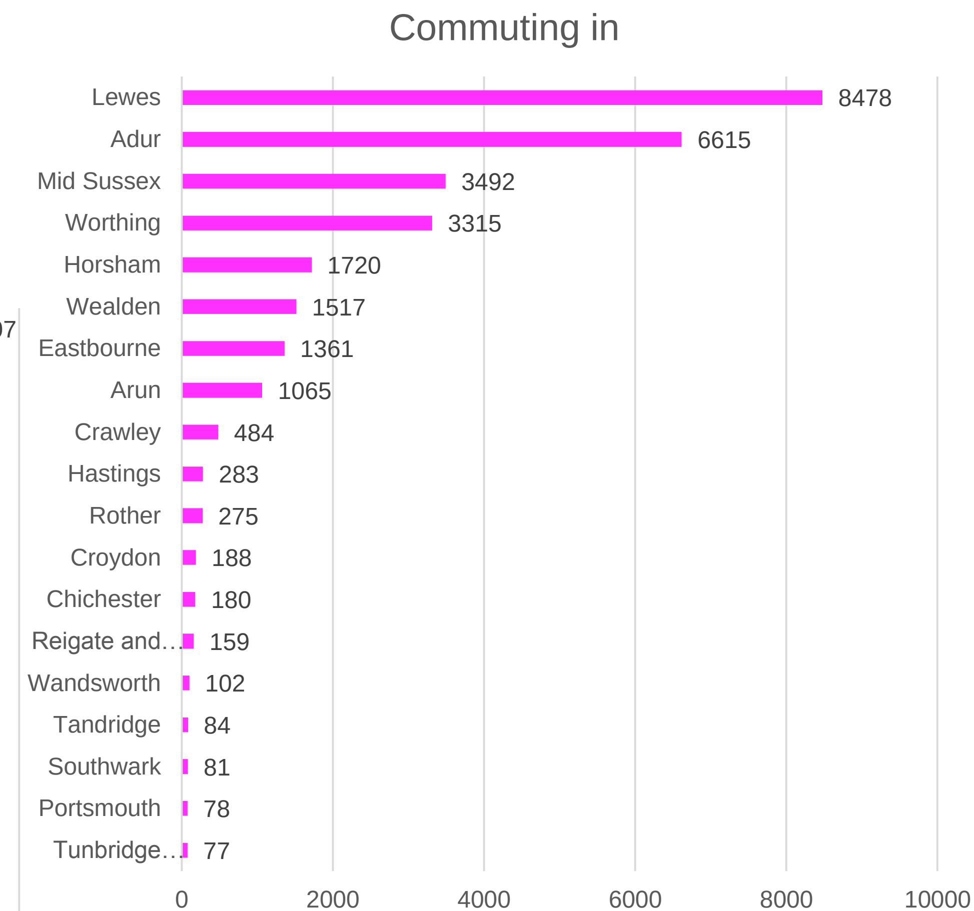
2.7 Travel to work

Over 6500 residents commute from Brighton & Hove into Greater London (inc Croydon). More 25-49 year olds commute outside the area from Brighton & Hove than travel into Brighton & Hove. There is more commuting into rather than from Brighton & Hove for all other age groups.





This shows strong connections with Greater Brighton area as well as with the Gatwick Diamond and East Sussex areas.

Source: 2011 Census merged local authority district

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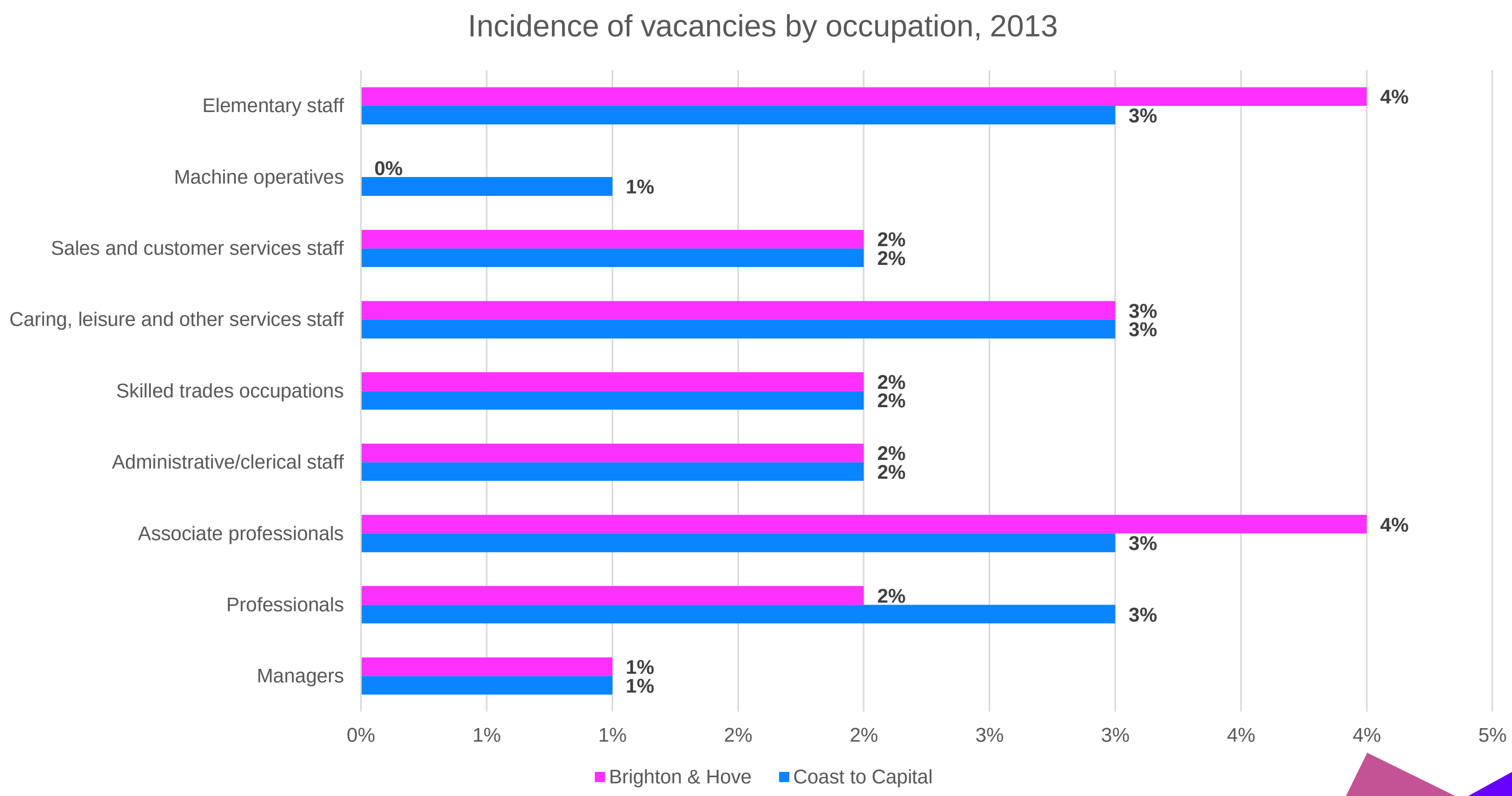
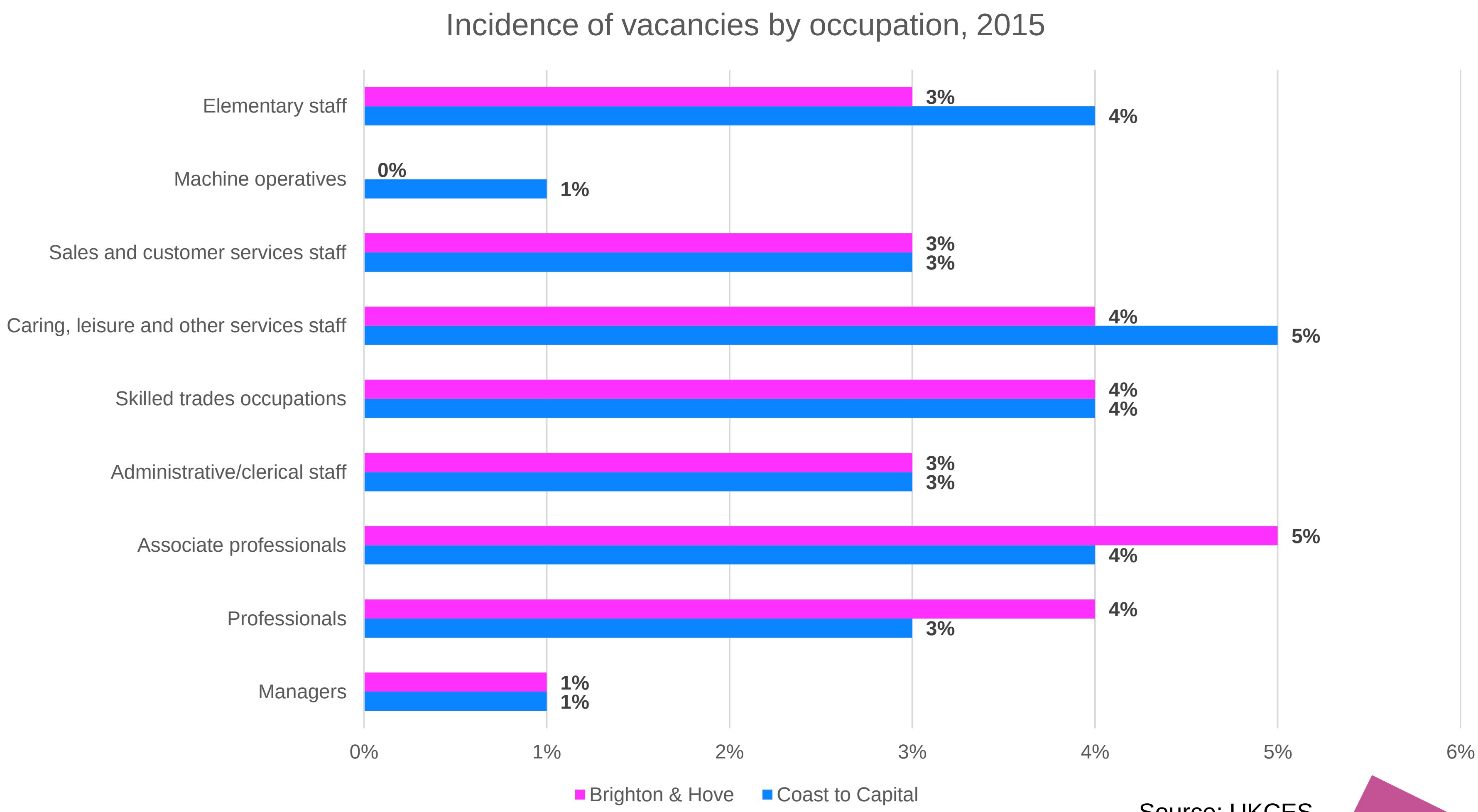
2.8 In 2013 vacancy rates were low but there were vacancies in a range of areas from elementary to management levels



Source: UKCES Employer Skills Survey 2013

2.9 Vacancy rates by occupation in 2015



In 2015 the incidence of vacancies for associate professionals and professionals was greater in Brighton & Hove than Coast to Capital. As in 2013, there is the lowest incidence of vacancies among managers (1%) for both Brighton & Hove and Coast to Capital.

Source: UKCES Employer Skills Survey 2015

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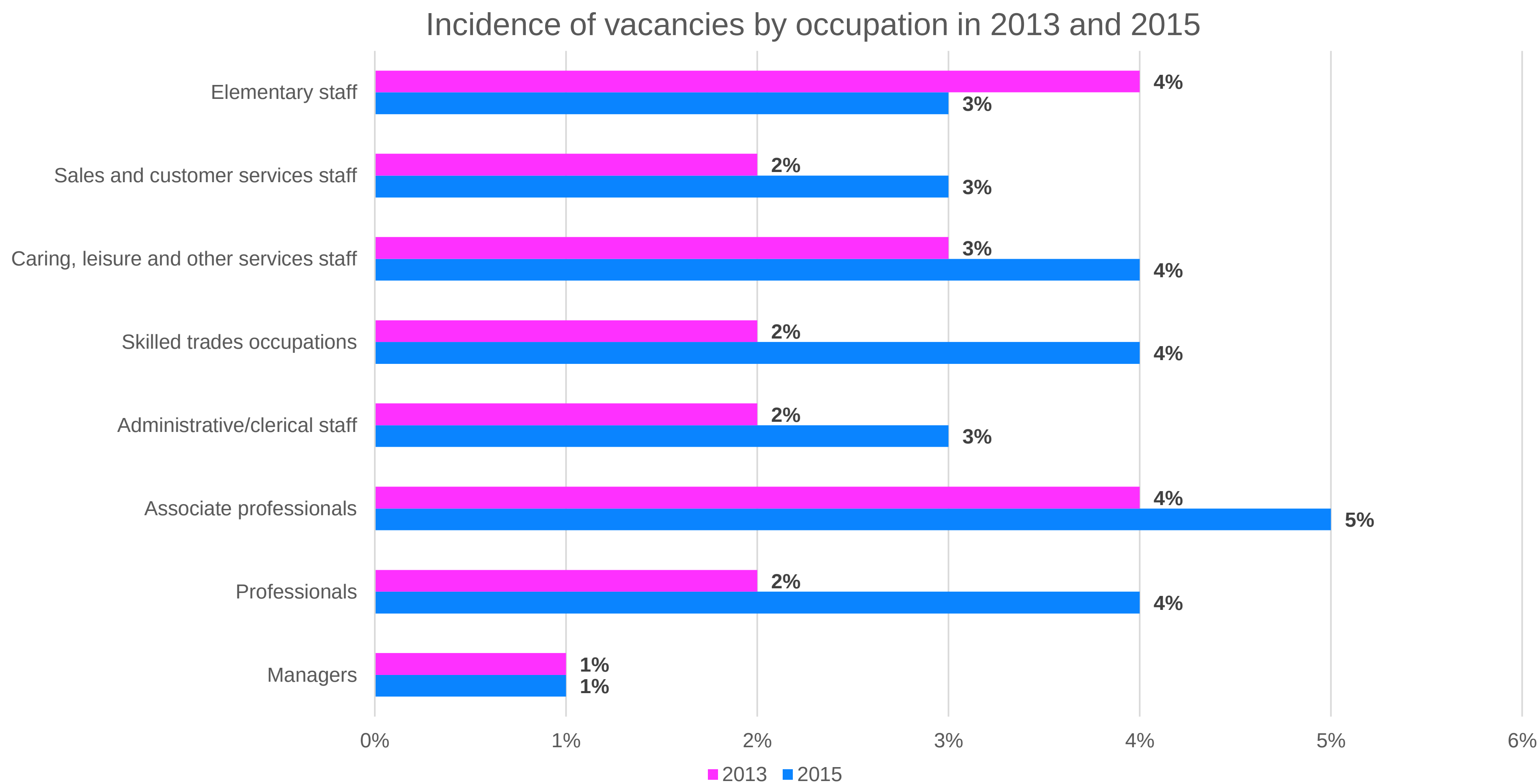
2.10 The incidence of vacancies has increased amongst almost all occupations in Brighton & Hove



This graph compares the incidence of vacancies by occupation for Brighton & Hove in 2013 and 2015. It demonstrates that vacancies have become more prevalent among all occupations apart from elementary staff – which have seen a decrease of 1% - and managers – which have remained the same. This suggests that there are vacancies across all levels of employment. NB: Machine operatives have been removed due to the lack of data for Brighton & Hove.

Source: UKCES Employer Skills Survey 2013 and 2015

Brighton & Hove City Council

Sector trends, growth and skills needs

3. Sector trends, growth and skills needs - Summary

Trends

- Despite some changes between years, there has been little change in employment sectors since 2010, with some increases in employment by sector including transport, communication and other services (since 2013), making it distinctive from the Greater Brighton area and decreases in distribution, hotels and restaurants, manufacturing and construction.
- Trends in employment by occupation also show little change overall since 2010, although employment in caring, leisure and service and elementary occupations has increased in the past year.
- Public administration, education and health remains the highest employment sector representing over one third of employees. Even accounting for projected cuts in public sector employment this position is unlikely to change substantially.
- Financial services remains the second largest employment sector (one fifth of employees), yet is concentrated in a small number of employers. Requirements for higher level skills and qualifications(4 and 5) represents a key skills challenge as current skills gaps in retail services are reported at being between levels 1 and 3.
- Latest data from the UKCES Employer Survey 2015 shows that there continue to be reported skills gaps in the City and that employees are choosing to remain in lower level jobs as they do not want added responsibility and/or the hours suit them better.
  Reported skills gaps are attributed to training only being partially completed, changes to working practices, staff new to role and not being fully trained for the job.

Brighton & Hove City Council

3. Sector trends, growth and skills needs - Summary

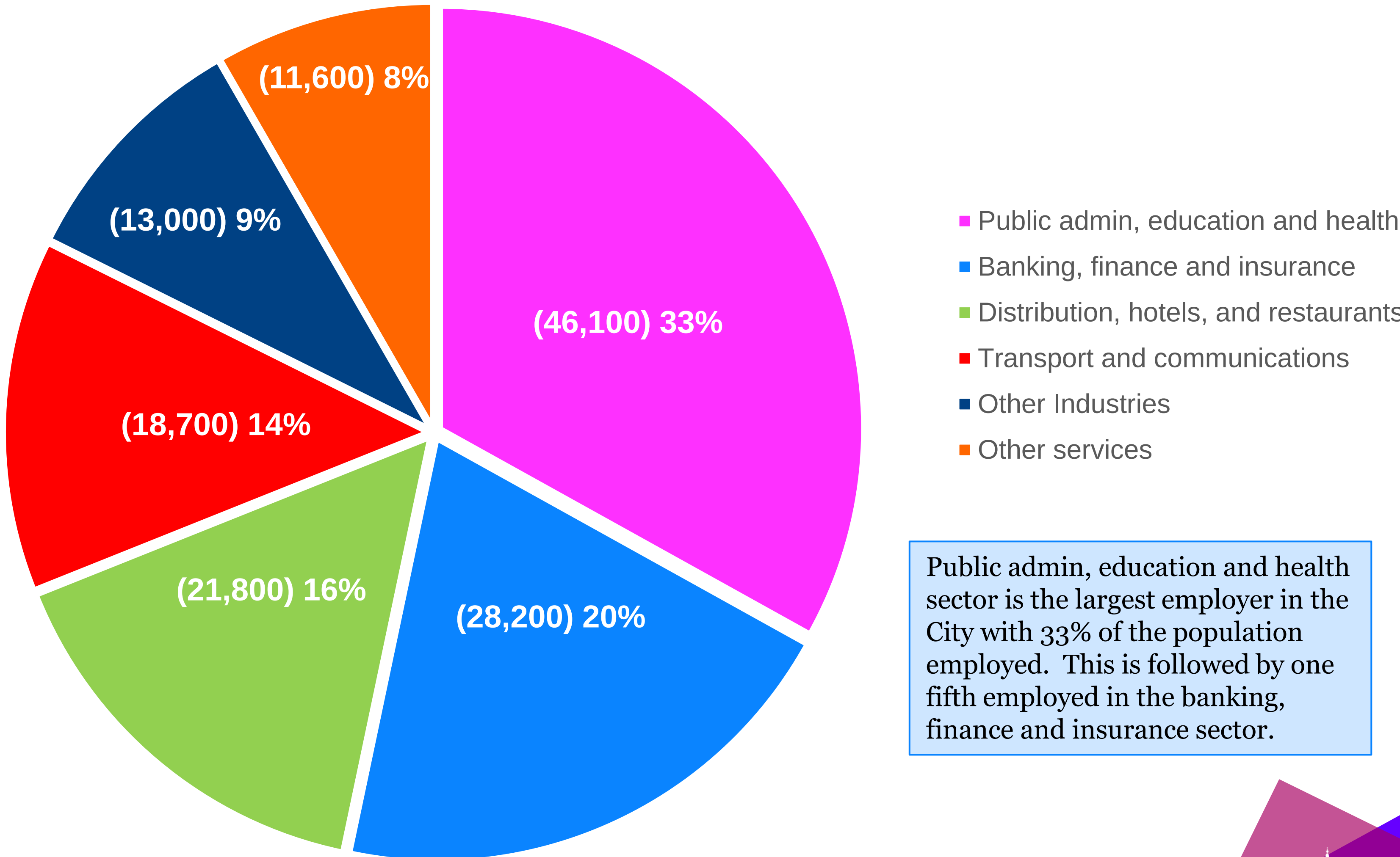
- The CDIT sector however is reporting skills gaps and these have worsened, rather than improved. This sector is a key contributor to the economic growth of the City.
- Although there will be jobs growth in the City and opportunities to take advantage of regeneration programmes and devolution, replacement demand for jobs outstrips net jobs growth by eight times.
- 24.9% of employers have reported that at least one member of their current staff is not considered fully proficient at their job (around 9% of all staff).

Implications for the CESP 2016-2020

It will be important to focus actions within the CESP that are within the control and influence of local partners. Keeping up to date local labour market intelligence will be key in ensuring skills and training provision is meeting the demands of employers.

Focusing interventions equally where the City can make the greatest impact or for sectors that are important for economic resilience and growth ie ensuring there is an offer of support for public sector, financial services, retail, tourism and CDIT businesses to meet replacement demand for jobs and changes in skills requirements.

3.1 Public sector and Finance are the most significant employers in Brighton & Hove

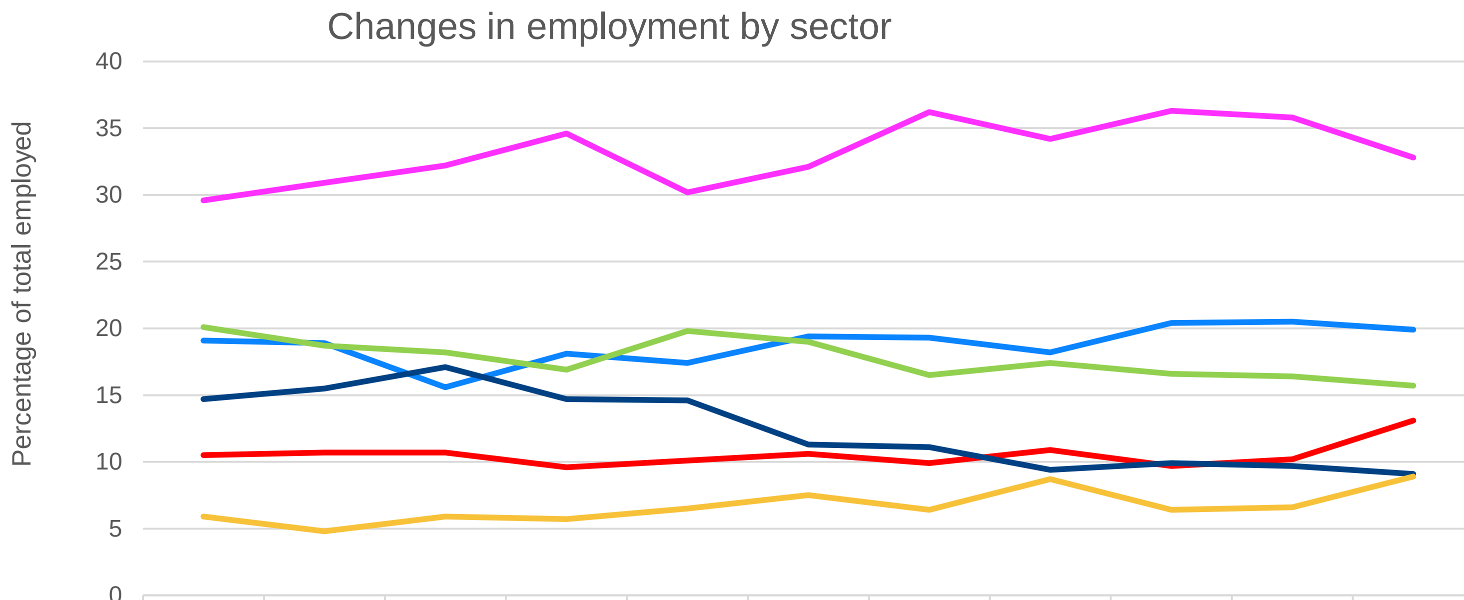


Public admin, education and health sector is the largest employer in the City with 33% of the population employed. This is followed by one fifth employed in the banking, finance and insurance sector.

Source: NOMIS annual population survey – workplace analysis July 2014 – June 2015

Brighton & Hove City Council

3.2 There has been relatively little change in the structure of employment by sector since 2005

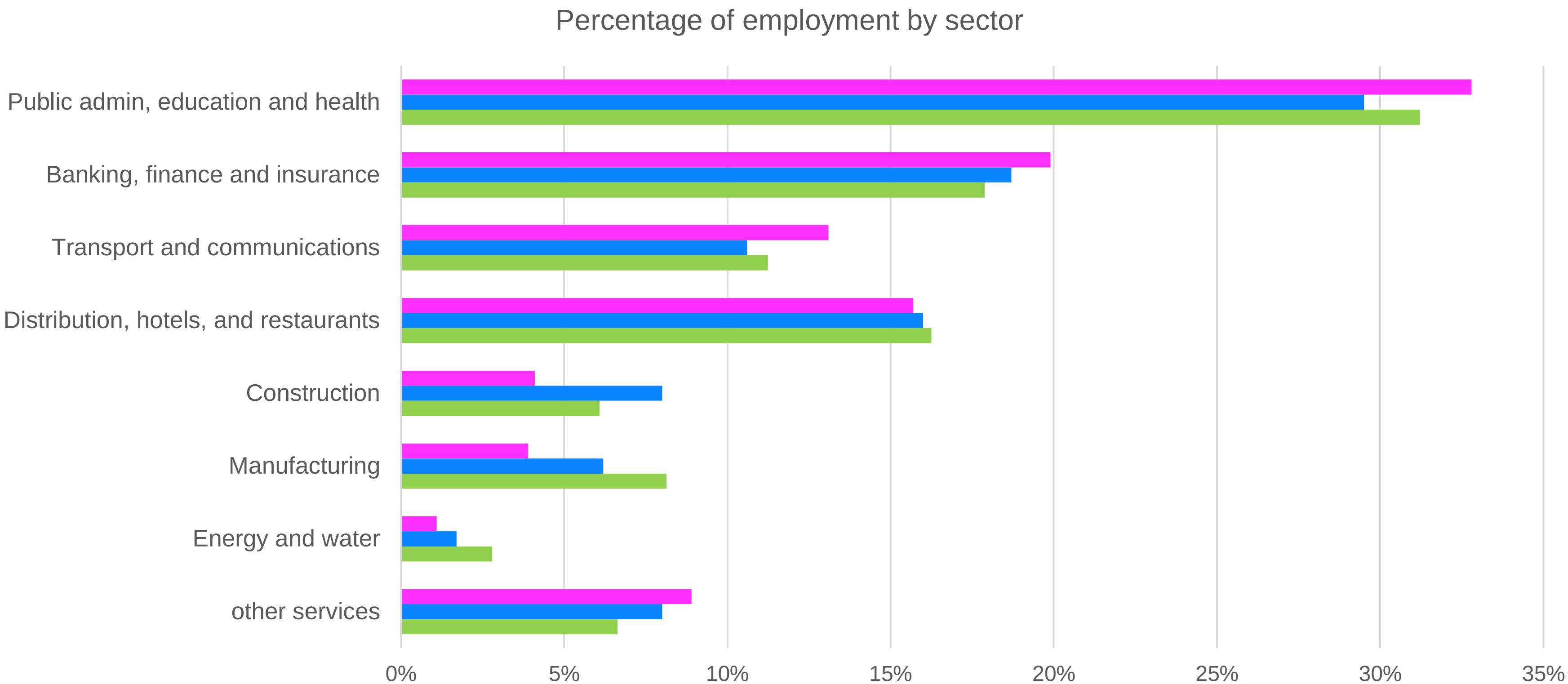


	Jun-05	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Public admin, education and health	29.6	30.9	32.2	34.6	30.2	32.1	36.2	34.2	36.3	35.8	32.8
Banking, finance and insurance	19.1	18.9	15.6	18.1	17.4	19.4	19.3	18.2	20.4	20.5	19.9
Distribution, hotels, and restaurants	20.1	18.7	18.2	16.9	19.8	19	16.5	17.4	16.6	16.4	15.7
Transport and communications	10.5	10.7	10.7	9.6	10.1	10.6	9.9	10.9	9.7	10.2	13.1
Other industries	14.7	15.5	17.1	14.7	14.6	11.3	11.1	9.4	9.9	9.7	9.1
Other services	5.9	4.8	5.9	5.7	6.5	7.5	6.4	8.7	6.4	6.6	8.9

Since 2005: public sector employment has fluctuated around 30-35% but has stayed the largest employer throughout and is at the same level as 2010, despite cuts in some public sector spending; and distribution, hotels and restaurants has decreased from above just 20% to just above 15% Transport, communication and other services have both seen an increase since 2013. Overall there has been little change in the structure of employment by sector and this is likely to be a similar case over the lifetime of the plan with some changes but replacement demand outstripping net job growth by eight times between 2012 and 2022 (UKCESS Coast to Capital LMI 2015).

Source: NOMIS annual population survey

3.3 There is little difference in employment sectors comparing Brighton & Hove with other areas



	other services	Energy and water	Manufacturing	Construction	Distribution, hotels, and restaurants	Transport and communications	Banking, finance and insurance	Public admin, education and health
Brighton and Hove	9%	1%	4%	4%	16%	13%	20%	33%
Coast to Capital	8%	2%	6%	8%	16%	11%	19%	30%
Greater Brighton	7%	3%	8%	6%	16%	11%	18%	31%

Compared to Coast to Capital and the Greater Brighton region, Brighton & Hove has:

- Less construction, manufacturing and energy and water employment
- More public, finance, transport and communications, and other services employment.

Source: NOMIS annual population survey

Brighton & Hove City Council

3.4 The CDIT sector in Brighton & Hove

- 23.4% of all businesses in Brighton & Hove are in the CDIT sector compared to 15.5% of the Coast to Capital region average and a CDIT cluster (second to Although Brighton & Hove has a larger share of businesses within the creative sector (55%).
- Brighton & Hove has 22% of all CDIT employees across the Coast to Capital region c8844. Applying the rate of increase suggested for the sector by the UKCES Working Future's report across the C2C region this is likely to result in an extra 2,000 new jobs (the majority at the highest level) in the City between 2012 and 2022.
- However skills gaps in the sector are increasing or remaining static, attributed to lack of investment in training and that the majority of businesses in the sector employ less than 9 people:

Short term gaps

IT Security skills

Cloud computing abilities

IT convergence skills

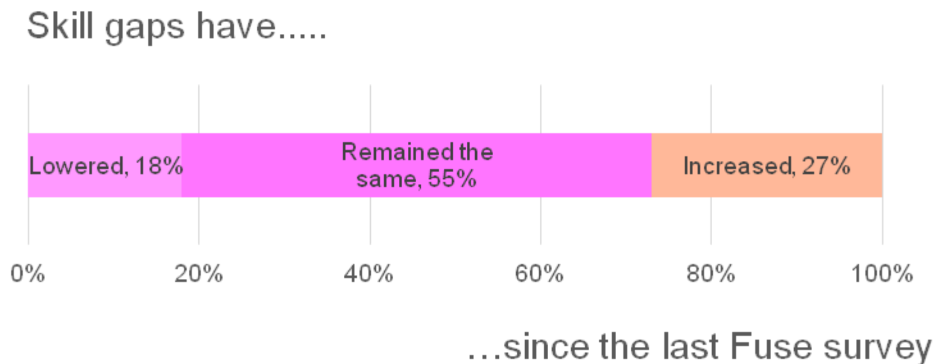
Multi-platform content management

Medium term gaps

Green IT skills

Information and analytics skills

Modelling and simulation skills



Sources: Coast to Capital Economic Assessment 2015
Brighton Fuse Second Wave Firms Survey

This demonstrates that the quantity of graduates may not be sufficient to meet the growing demand for professional and technical skills. Employers are increasingly concerned about education's ability to provide the required number of able students with the most up-to-date vocational skills and qualifications. There is a need for organisations such as Croydon Tech City, Wired Sussex, and the Sussex Innovation Centre, which provide support for the CDIT sector, including support for improving skills in the sector.

Brighton & Hove City Council

3.5 The Financial Services Sector in Brighton & Hove

- 17.7% of all businesses in Brighton & Hove are in financial and business services, compared to 18% average of the Coast to Capital region and accounts for nearly 29,000 jobs in the City. It has the highest concentration of jobs but the least number of businesses as it is home to a number of larger employers such as American Express.
- Employment growth within the sector is going to increase by 17,000 between 2012 and 2022 according to the UKCES Working Futures report. Applying this increase in relation to Brighton & Hove's employment share compared to Coast to Capital (14.2%) could result in an additional c2410 new jobs by 2022.
- These jobs are likely to become higher skilled and require higher levels of qualifications, demand at the top level of jobs is expected to increase by 20%.
- However 77% of employers in retail financial services report skills gaps in; basic numeracy, problem-solving skills, people skills, industry knowledge and product knowledge and pay within the retail sector tends to be much lower than that of the wholesale.
- These skills gaps could be considered to be associated with those employees who have level 1 to 3 qualifications, in the future demand for employees with this level of qualification will reduce by 21%, and those with no qualifications falling by 22%.
- This suggests a real skills mismatch in current needs versus future demand and the need to support workforce development to develop the skills of those already employed as well as create training and development opportunities to support individuals to move from level 3 to level 4.

Sources: Coast to Capital Economic Assessment 2015

3.6 Jobs demand and issues important for Brighton & Hove

Greater Brighton devolution and the growth and regeneration plans for the Greater Brighton region and Brighton & Hove present opportunities around jobs and support for business over the lifetime of the plan:

- Advanced Engineering – the new campus in Moulsecoomb will create 45 higher level jobs and produce 60 engineering graduates per annum
- Central Research Laboratory Growth Centre, Preston Barracks will create a space for innovation and entrepreneurship
- Shoreham Harbour Regeneration scheme creating a short term need for over 1500 construction jobs
- Circus Street Innovation Hub creating over 200 predominantly local jobs
- City College Brighton & Hove Construction Trades Centre opening in 2016 to scale and improve the quality of construction training

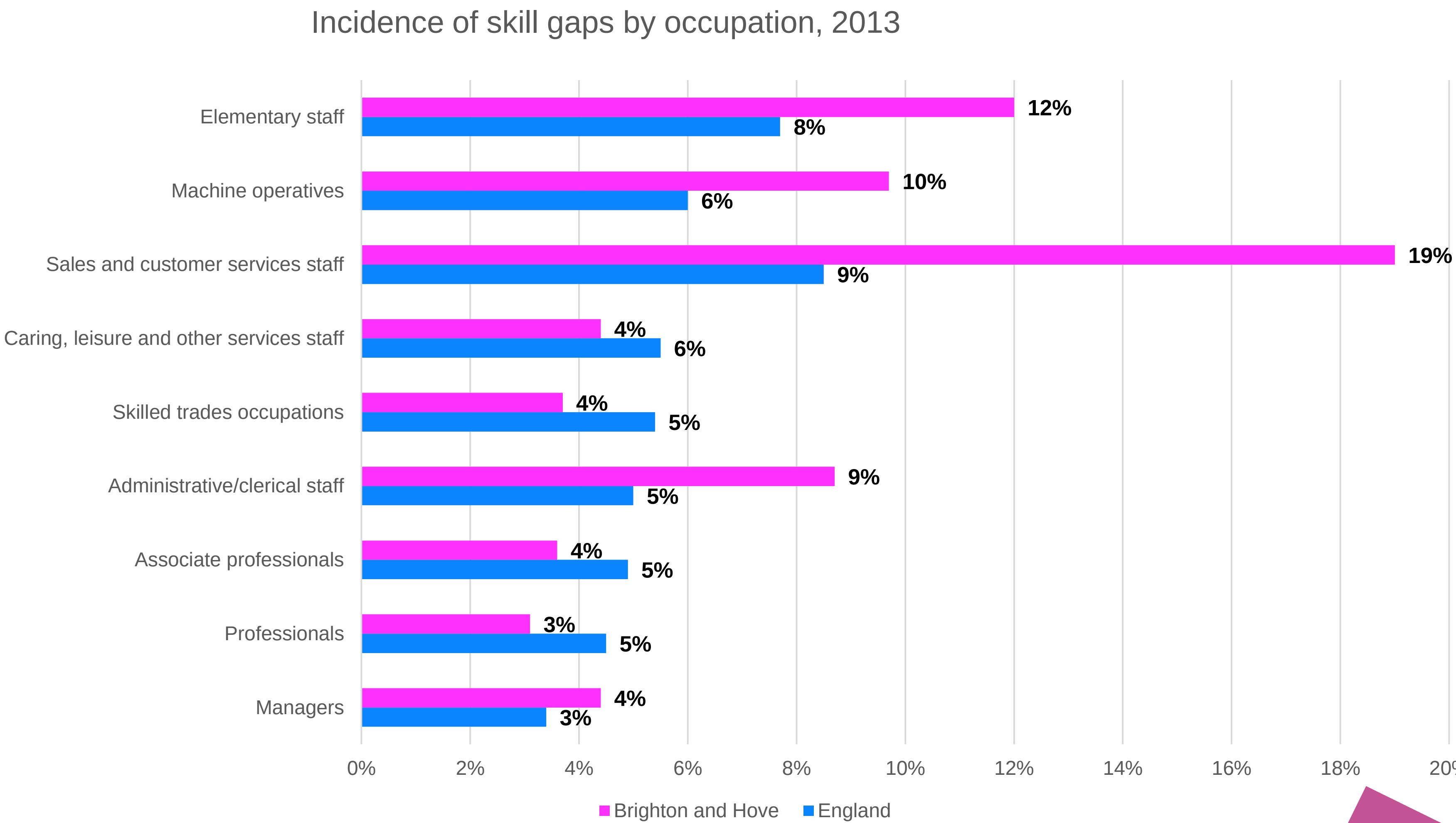
The proportion of high skilled jobs is expected to increase and low to mid skilled jobs are expected to decrease. Between 2012 and 2022, across the Coast to Capital region there is expected to be:

- A modest increase in the number of jobs available (45,000)
- A large amount of replacement demand for new staff (369,000) – eight times more than the number of new jobs
- A reduction in the number of low and mid-skilled jobs (from 18% to 12% of employment of employment)
- An increase in the number of high skilled jobs (from 41% of to 51% of employment)

Brighton & Hove City Council

Sources: Coast to Capital Economic Assessment 2015 and Greater Brighton Economic Board Report 2015

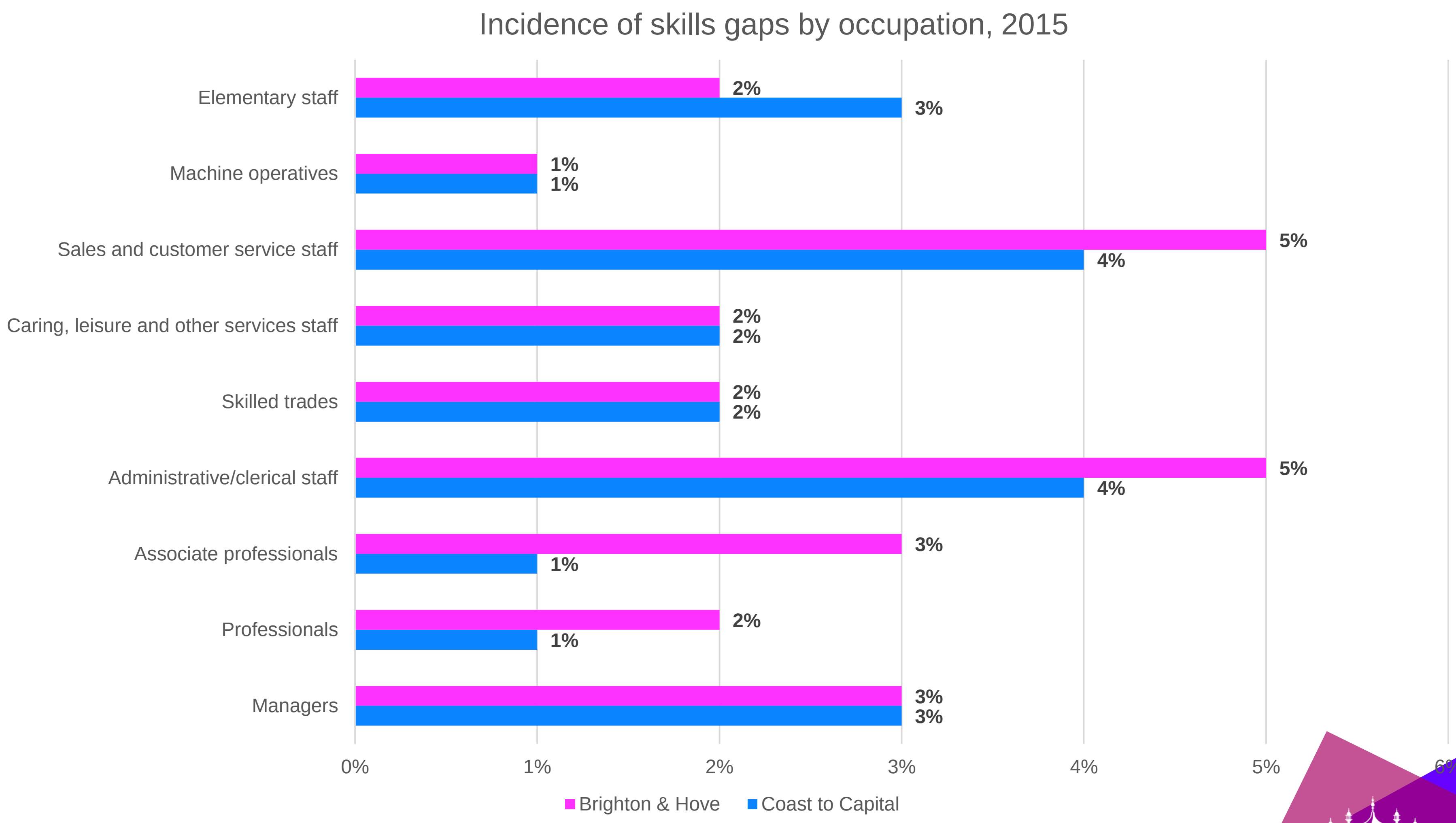
3.7 Despite growth predictions for higher level roles, in 2013 employer-reported skills gaps were concentrated at the lower level



Source: UKCES Employer Skills Survey 2013

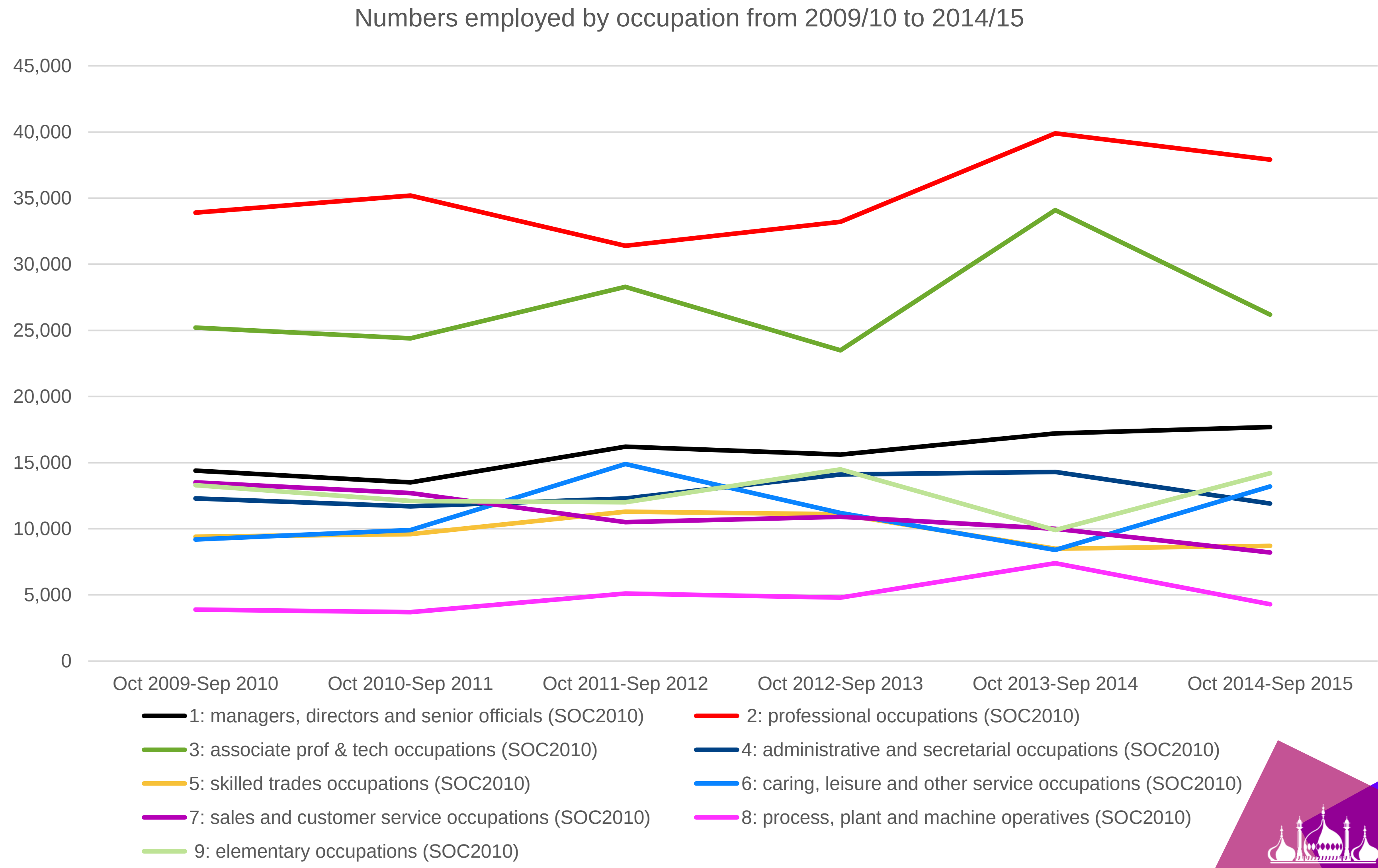
Brighton & Hove City Council

3.8 Employer-reported skills gaps in Brighton & Hove are smaller for all occupations and no longer concentrated at the lower level



Source: UKCES Employer Skills Survey 2015

3.9a Changes in employment by occupation since 2010



Source: NOMIS Annual Population Survey

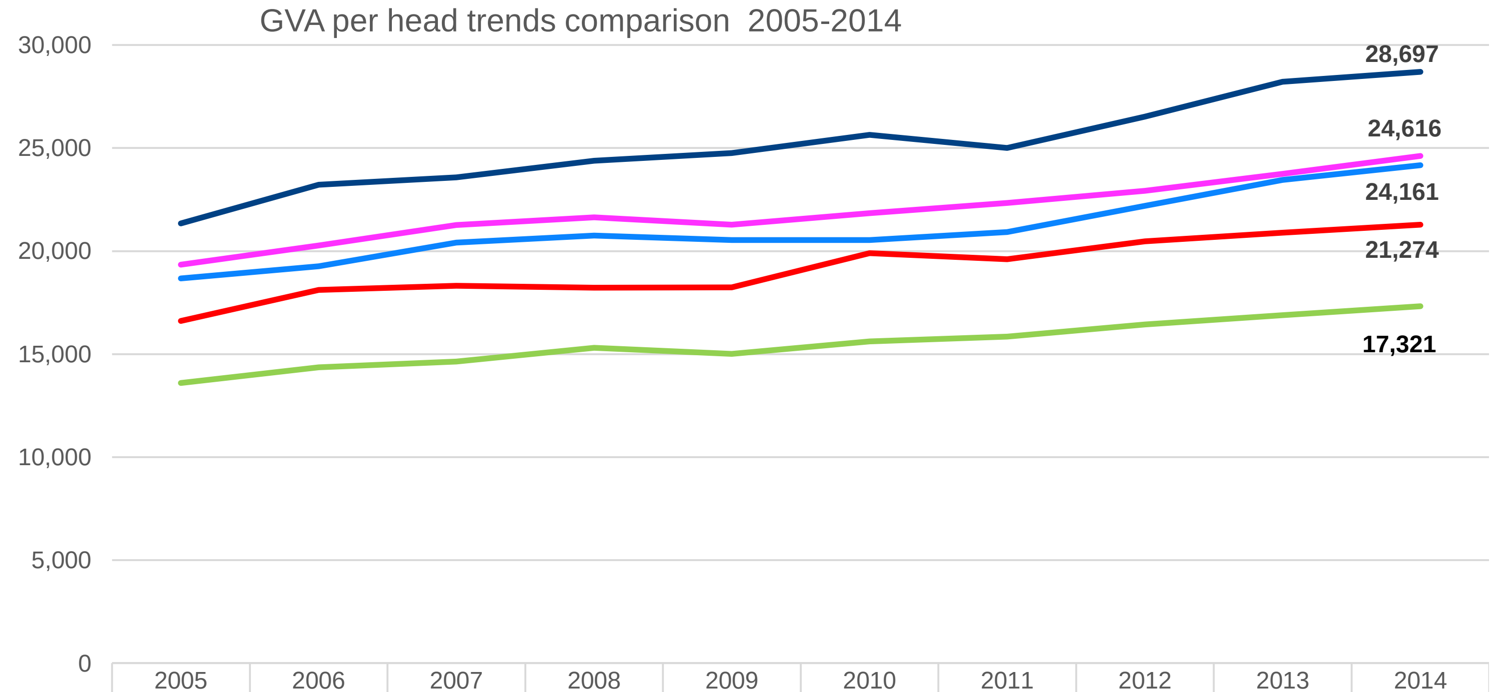
Brighton & Hove City Council

3.9b Commentary on trends on employment change …

- Trends in employment by occupation also show little change overall since 2010, although caring, leisure and service and elementary occupations are showing an increase in the past year.

- Higher level professions and associated professional and technical occupations show some shifts in year and have declined in the past year (back to around their original position in 2010).

3.10 Productivity is improving but has some way to go to meet GVA per head in West Sussex (NE)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
UK	19,348	20,279	21,258	21,642	21,283	21,842	22,336	22,929	23,750	24,616
Brighton and Hove	18,666	19,263	20,416	20,752	20,529	20,529	20,919	22,189	23,459	24,161
East Sussex CC	13,594	14,360	14,633	15,304	15,013	15,624	15,845	16,444	16,886	17,321
West Sussex (South West)	16,616	18,117	18,311	18,223	18,238	19,906	19,603	20,477	20,894	21,274
West Sussex (North East)	21,342	23,218	23,584	24,389	24,755	25,636	24,999	26,517	28,215	28,697

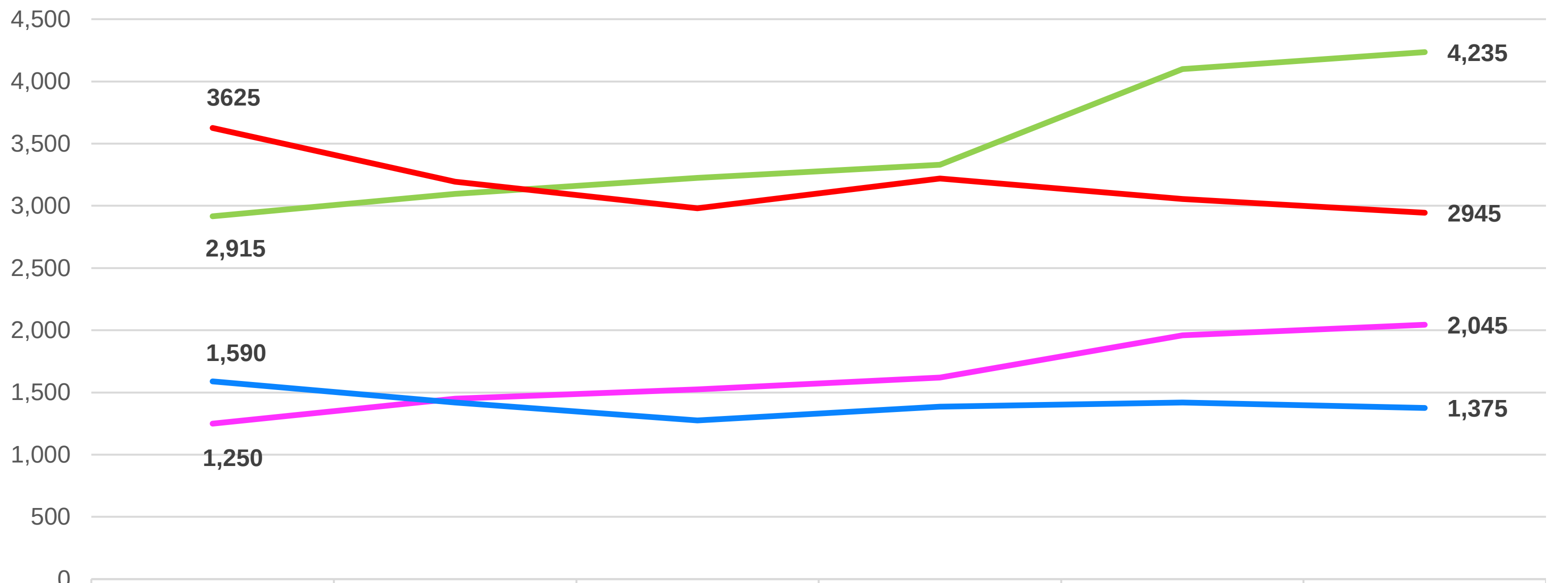
Brighton & Hove is ranked in the top ten for many indicators of the conditions conducive to business growth. It has recently been ranked second in a Vitality Index produced by Lambert Smith Hampton (property consultants) and performs well in the Centre for Cities, Cities Outlook - for example it is in the top ten for superfast broadband connectivity and for cities within the highest number of start-ups. However it ranks in the middle in terms of business churn rate (21/63) and ratio of private to public sector employment (31/62).

Source: ONS Regional GVA, Centre for Cities Outlook data tool 2016

Brighton & Hove City Council

3.11 An entrepreneurial city, increase in business start ups, but deaths remain consistent

Comparison of new enterprise starts and deaths between Brighton & Hove and Greater Brighton



	2009	2010	2011	2012	2013	2014
B and H Starts	1,250	1,450	1,525	1,620	1,960	2,045
B and H Deaths	1,590	1,420	1,275	1,385	1,420	1,375
GB Starts	2,915	3,095	3,225	3,330	4,100	4,235
GB Deaths	3625	3195	2980	3220	3055	2945

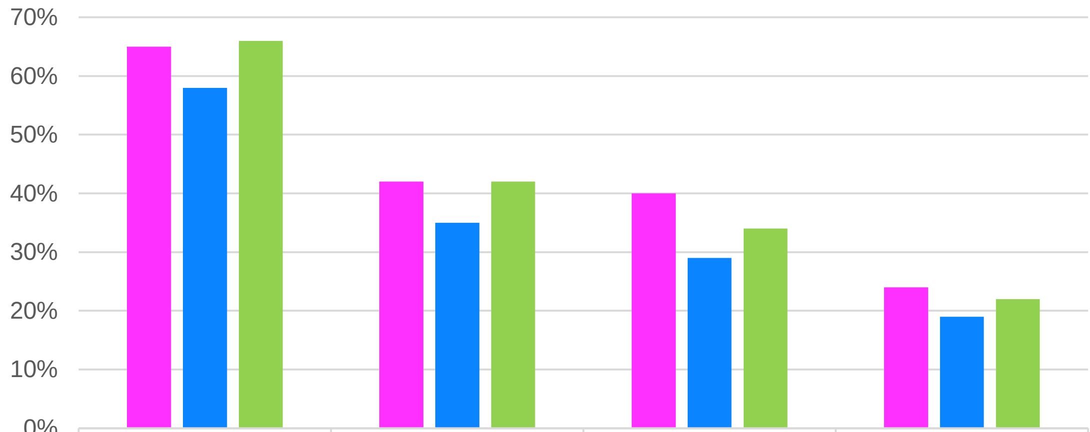
Despite scoring high in its business start ups, it is also ranked 5th highest in terms of business deaths. Although overall business deaths are reducing in the Greater Brighton area, they have remained at relatively consistent level in Brighton & Hove. This suggests that there are some systemic issues that are contributing to business deaths in the city.

Brighton & Hove City Council

Source: Centre for Cities Outlook data tool 2016

3.12 The majority of employers have a business plan but there are improvements to be made around training provision

The existence of business plans, training plans and budgets for training



	Business plan specifying objectives for the coming year	A training plan	Budget for training expenditure	All of the above
Brighton and Hove	65%	42%	40%	24%
East Sussex	58%	35%	29%	19%
West Sussex	66%	42%	34%	22%

65% of employers in Brighton & Hove have a business plan specifying objectives for the coming year. This is greater than East Sussex (58%) but slightly less than West Sussex (66%). Employers in Brighton & Hove are more likely to have a budget for training expenditure than both East Sussex and West Sussex. For Brighton & Hove the reasons most widely expressed by businesses for not providing training are that staff are already fully proficient (68% of businesses), and that training is not considered a priority (14%).

Top 10 reasons for not providing training	Brighton & Hove	East Sussex	West Sussex
All our staff are fully proficient / no need for training	68%	64%	69%
Training is not considered to be a priority for the establishment	14%	16%	7%
Learn by experience/Learn as you go	10%	6%	4%
No money available for training	8%	5%	7%
Any staff training has been arranged AND funded elsewhere	5%	4%	3%
No training available in relevant subject area	1%	5%	7%
No particular reason	1%	4%	1%
The courses interested in are not available locally	0%	1%	0%
External courses are too expensive	0%	0%	3%
Employees are too busy to undertake training and development	0%	5%	3%

Source: 2015 UKCES data

Brighton & Hove City Council

3.13 Being overqualified for a job can be a choice

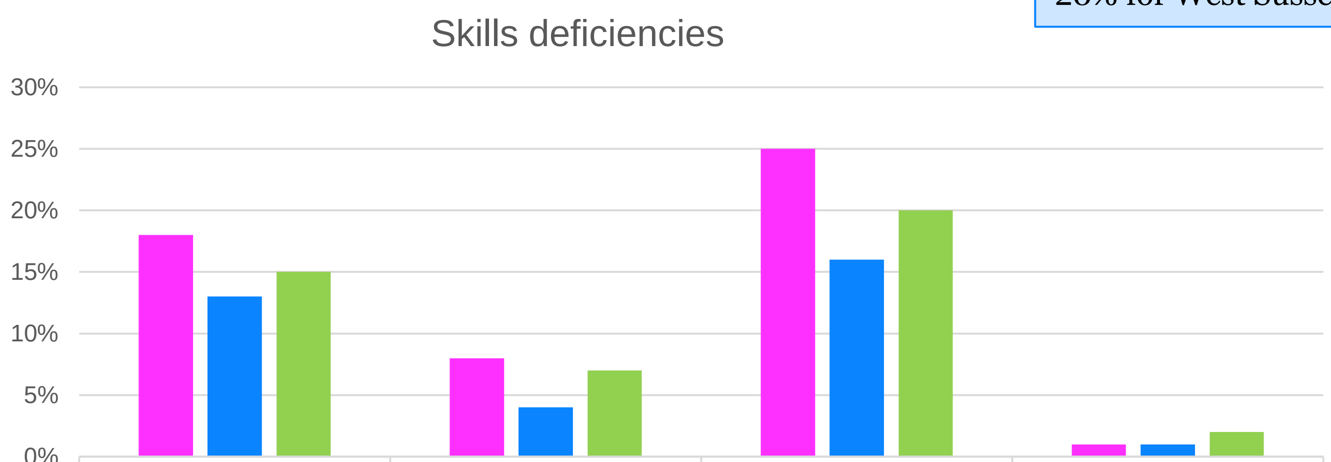
Top 10 reasons why staff are working in a role for which they have qualifications and skills more advanced than required	Brighton & Hove	East Sussex	West Sussex
They are not interested in taking on a higher level role with more responsibility	21%	24%	25%
The working hours suit them better	17%	17%	14%
Competition for higher level roles / they are struggling to get a higher level job	15%	3%	5%
Lack of jobs in the desired higher level role	13%	7%	11%
Attractive conditions of employment (e.g. pay and benefits location of firm)	11%	10%	11%
Current role is temporary job / stop gap before starting desired career	10%	4%	7%
Don't know	10%	3%	4%
We actively seek staff with qualifications and/or skills beyond those needed	7%	5%	6%
They own the business / are a partner in the business	6%	18%	6%
To gain experience / current role is lower level in same industry as desired higher level role	5%	7%	9%

Source: 2015 UKCES data

This table lists the top 10 reasons why staff are working in a role for which they are overqualified in Brighton & Hove, and enables comparison with East Sussex and West Sussex. It demonstrates that the two most common reasons stated by employees who are in a role for which they are overqualified in Brighton & Hove, East Sussex and West Sussex are that they are not interested in having greater responsibility, and that the working hours of their current job suit them well. This suggests that being overqualified for a job can be a choice for employees. It is nonetheless important to recognise that 15% of employees in Brighton & Hove who are in a role for which they are overqualified suggest that they are struggling to get a higher level job due to competition in the labour market. This amounts to 420 employees in Brighton & Hove. It is these employees who require support, as they have a real desire to achieve job progression.

3.14 Employees in Brighton & Hove are more likely to have either a skills gap or skill-shortage vacancy

4% of employees in Brighton & Hove consider themselves to be not fully proficient. This accounts for 4,311 employees. Levels of proficiency are very similar in East Sussex (6%) and West Sussex (4%). However, in terms of skills deficiencies Brighton & Hove fares comparatively worse than the other two areas. In particular, 25% of employers in the city report either a skills gap or a skill-shortage vacancy, compared to 16% for East Sussex and 20% for West Sussex.



	Have any skills gap	Have skill-shortage vacancy	Either skills gap or skill-shortage vacancy	Both skills gap and skill-shortage vacancy
Brighton and Hove	18%	8%	25%	1%
East Sussex	13%	4%	16%	1%
West Sussex	15%	7%	20%	2%

Source: 2015 UKCES data

Brighton & Hove City Council

3.15 The top ten causes of skills gaps in Brighton & Hove

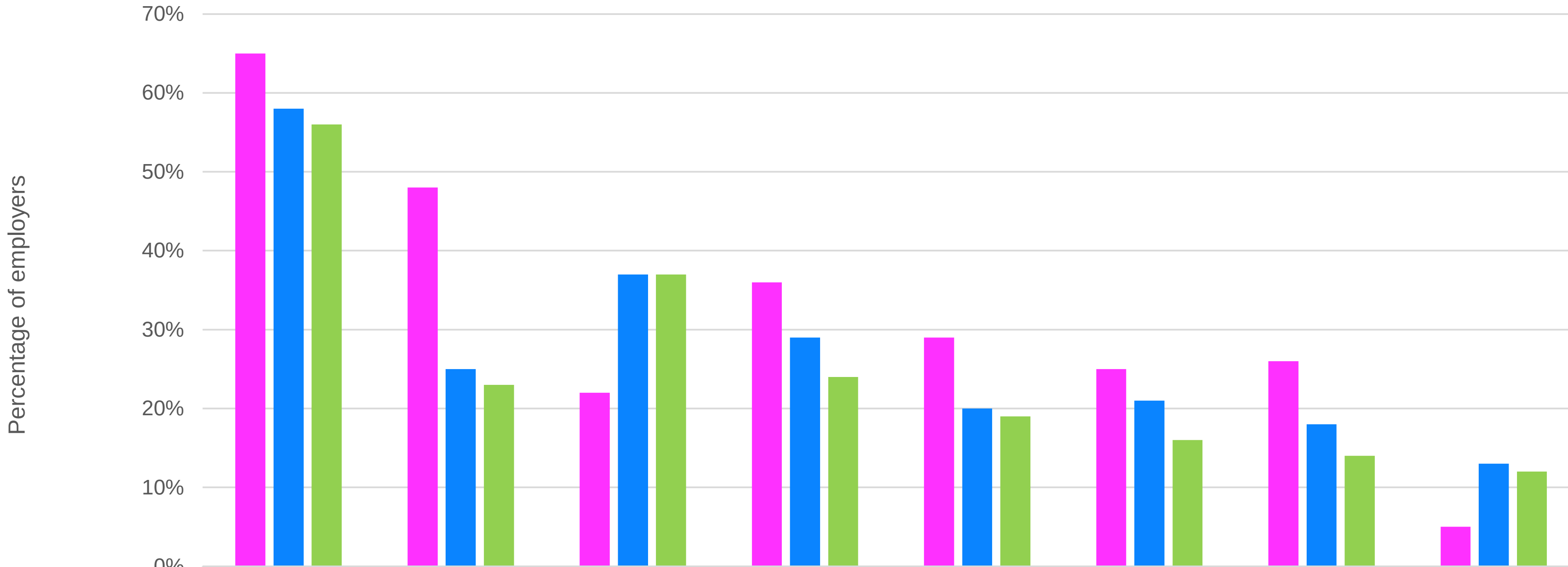
The top 10 causes of skills gaps	Brighton & Hove	East Sussex	West Sussex
Their training is currently only partially completed	73%	50%	65%
They are new to the role	70%	76%	69%
The introduction of new working practices	43%	31%	35%
They have not received the appropriate training	34%	17%	38%
They have been on training but their performance has not improved sufficiently	32%	25%	40%
The introduction of new technology	28%	17%	34%
Problems retaining staff	23%	16%	29%
Staff lack motivation	22%	51%	38%
Unable to recruit staff with the required skills	17%	25%	29%
The development of new products and services	13%	18%	30%

Source: 2015 UKCES data

The table lists the top ten causes of skills gaps in Brighton & Hove, and enables comparison with East Sussex and West Sussex. The most common cause of skills gaps in Brighton & Hove is that training is not yet completed, often because the employee is new to the role. Whilst this sheds a relatively positive light on Brighton's in-work training offer, the forth most common cause of skills gaps is that the employee has not received the appropriate training. 34% of employees in Brighton & Hove, equivalent to 1,276 individuals, agree with this statement. This is worrying and demonstrates that there remains significant challenges around workplace training provision that need to be addressed.

Brighton & Hove City Council

3.16 Implications of skills gaps in Brighton & Hove, East Sussex and West Sussex



	Increase workload for other staff	Have difficulties introducing new working practices	No particular problems	Have higher operating costs	Have difficulties meeting quality standards	Lose business or orders to competitors	Delay developing new products or services	Outsource work
Brighton and Hove	65%	48%	22%	36%	29%	25%	26%	5%
East Sussex	58%	25%	37%	29%	20%	21%	18%	13%
West Sussex	56%	23%	37%	24%	19%	16%	14%	12%

This graph demonstrates that the most common implication of skills gaps in Brighton & Hove, East Sussex and West Sussex is the increase in workload for other staff. This has the greatest impact on Brighton & Hove with 65% of employers recognising this as a problem, compared to 58% for East Sussex and 56% for West Sussex. Another major implication of skills gaps for employers in Brighton & Hove is the difficulty of introducing new working practices, with almost double the percentage of employers recording this as a problem in Brighton & Hove (48%) compared to both East Sussex (25%) and West Sussex (23%).

Source: 2015 UKCES data

Brighton & Hove City Council

3.16 Skills gaps can be found among staff in a wide range of occupations

	Brighton & Hove	East Sussex	West Sussex
Elementary staff	17%	22%	17%
Professionals	16%	3%	8%
Administrative/clerical staff	16%	11%	20%
Sales and customer services staff	15%	37%	18%
Associate professionals	10%	2%	4%
Managers	9%	7%	9%
Caring, leisure and other services staff	7%	8%	12%
Skilled trades occupations	5%	7%	7%
Machine operatives	5%	4%	5%

This table presents data on the skills gaps base ie the percentage of staff in particular occupations who are not fully proficient. The occupations are listed in order of greatest to lowest skills gaps in Brighton & Hove. Interestingly, the employees with the greatest skills gaps are those in elementary occupations (17%). This is closely followed by those in professional occupations (16%) and administrative or clerical staff (16%), demonstrating that skills gaps can be found in both highly-skilled and more labour-intensive occupations. Interestingly, the skills gap for professionals is much greater in Brighton & Hove T 10% than it is for East Sussex (3%) and West Sussex (8%).

Source: 2015 UKCES data

Brighton & Hove City Council

Young people and apprenticeships

Brighton & Hove City Council

4. Trends on young people and apprenticeships - Summary

Trends

- Attainment rates for GCSEs are improving and in line with the trends in the region and with neighbouring areas.
- The numbers of NEETs are reducing and the intelligence around them improving as ‘unknown’ status of young people has reduced by more than half in the past three years.
- Employers are reporting gaps around soft skills, behaviours and general work readiness of young people in the City. Brighton & Hove is in the top five reported areas in England with greatest skills gaps.
- The numbers of young people claiming Job Seekers Allowance has reduced although there are 130 young people who have been claiming this for more than six months. Nearly two thirds of claimants are male.
- Apprenticeship starts have declined and although completions are improving, these are nearly three times behind the completion rates reported in Croydon.

Brighton & Hove City Council

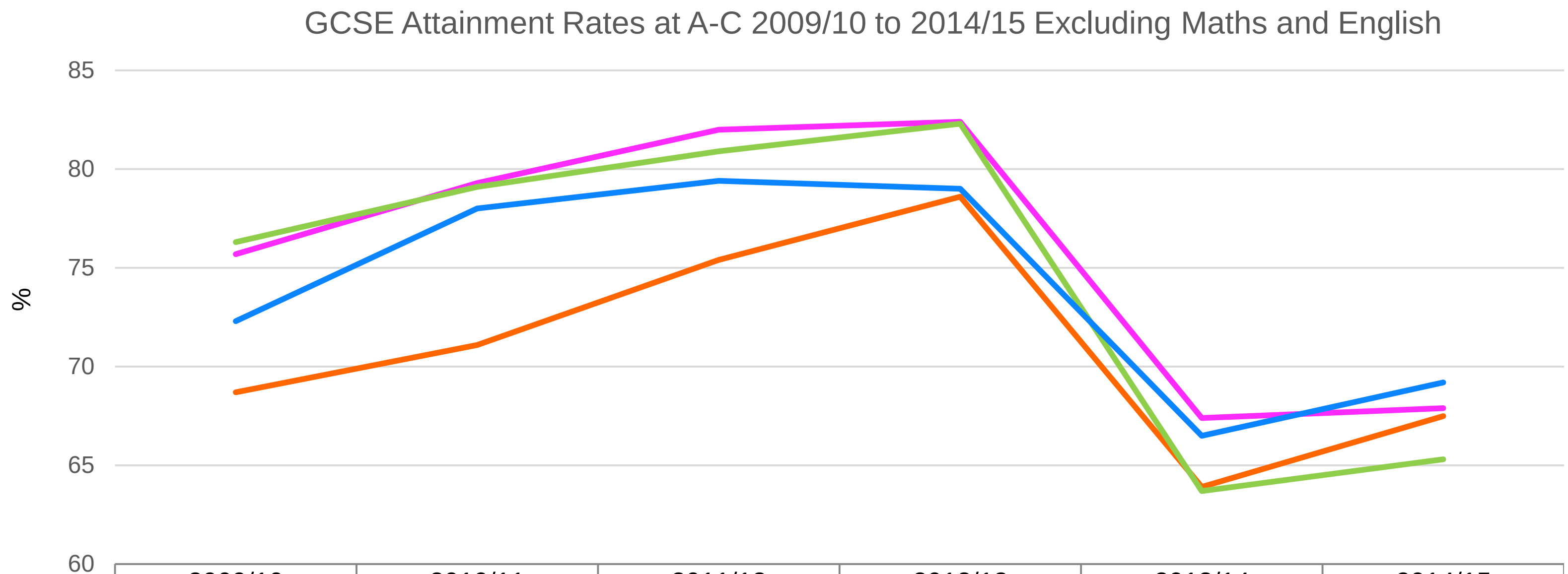
4. Trends on young people and apprenticeships - Summary

- There are more starts in apprenticeships for the over 25 age group compared with the under 19 and the 19-24 age groups.
- There is a predominance of business administration apprenticeships in the City compared with other sectors.

Implications for the CESP

There is a commitment to achieve 1000 new apprenticeship starts in 1000 days, it will be important that this ambition also targets key sectors and specific age groups so that participation and frameworks are in balance. There are some key actions to work with specific cohorts of young people to address their employability needs so that unemployment does not affect most of their adult life. Improving the work-readiness and attitudes of school leavers will be an important step in helping them adapt and thrive in work. Supporting schools to provide this is an obvious priority.

4.1a GCSE Attainment rates A-C are improving in the City



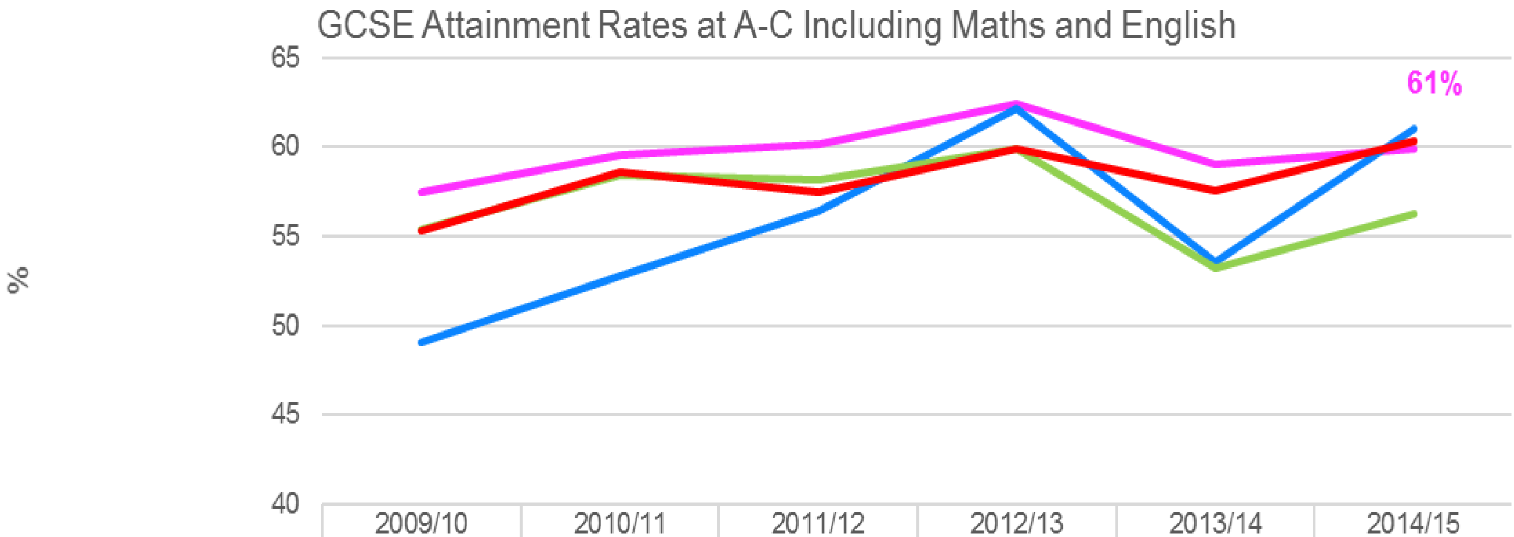
	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
South East	75.7	79.3	82	82.4	67.4	67.9
Brighton and Hove	68.7	71.1	75.4	78.6	63.9	67.5
East Sussex	76.3	79.1	80.9	82.3	63.7	65.3
West Sussex	72.3	78	79.4	79	66.5	69.2

GCSE attainment rates are improving in the City and are aligning with those of neighbouring areas and the South East. The sharp decline in rates in 2013/14 are attributed to changes in assessments and follow a national pattern. Although this was felt more in Brighton & Hove and East Sussex for attainment rates A-C including English and Maths. Latest data suggests that this has improved for Brighton & Hove students aligning with achievement rates in South East and West Sussex and has exceeded West Sussex by 0.7%.

Brighton & Hove City Council

Source: National Statistics Revised GCSE and equivalent results in England: 2014 to 2015

4.1b GCSE A-C Attainment inc Maths and English



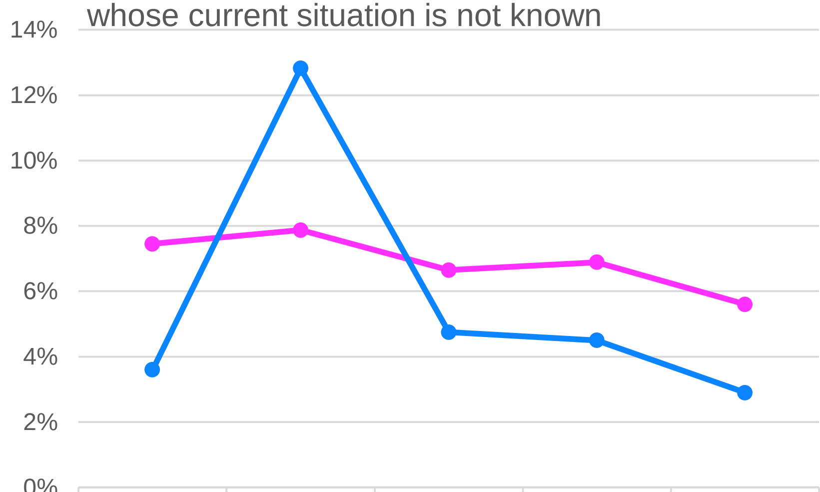
	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
South East	57.5	59.6	60.2	62.4	59	59.9
Brighton and Hove	49.1	52.8	56.4	62.2	53.6	61
East Sussex	55.4	58.4	58.2	59.9	53.2	56.3
West Sussex	55.3	58.6	57.5	59.9	57.6	60.3

Source: National Statistics Revised GCSE and equivalent results in England: 2014 to 2015

Brighton & Hove City Council

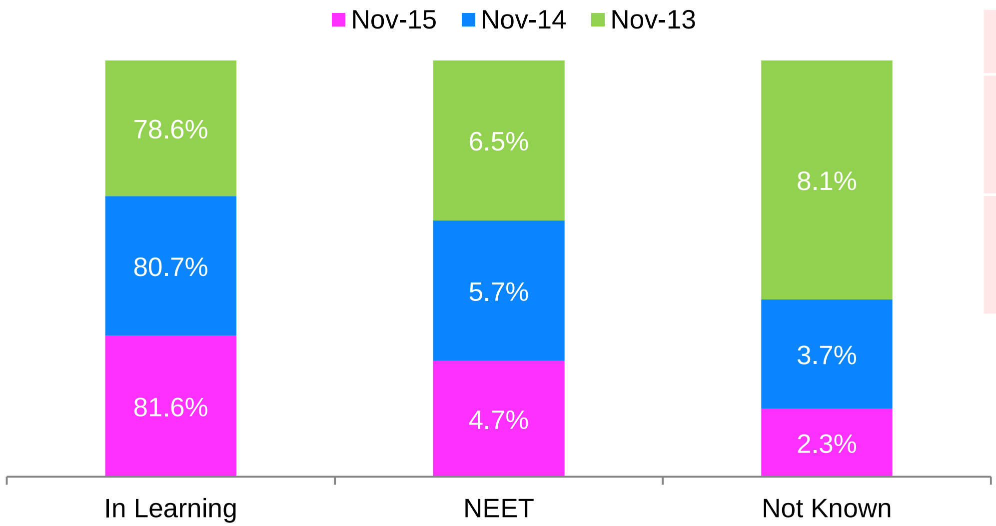
4.2 Around 170 students went from school into apprenticeships in 2013/14 – NEETs are reducing but numbers still high

Annual percentage of 16-18 year olds who are NEET and whose current situation is not known



	2010	2011	2012	2013	2014
Annual 16-18 NEET	7.45%	7.87%	6.65%	6.89%	5.60%
Annual 16-18 Not known	3.60%	12.82%	4.75%	4.50%	2.90%

Brighton & Hove Post 16 team have made concerted efforts to reduce both the numbers of NEETs in the City as well as identifying those that were unknown. NEETs have reduced by nearly 2% since 2013 and unknown from 8.1% of young people to 2.3%. Numbers of young people leaving school at Key Stage 5 and 4 in 2013/14 had doubled from the previous year although numbers are relatively low compared to the number of apprenticeship starts.



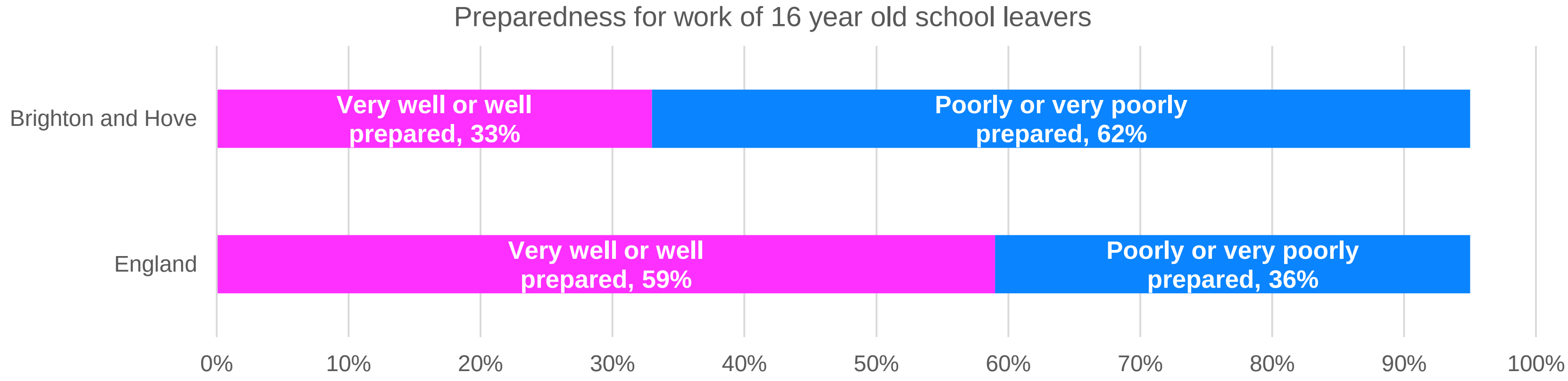
Numbers of students rounded to the nearest 10, leaving Key Stages 4 and 5 into apprenticeships

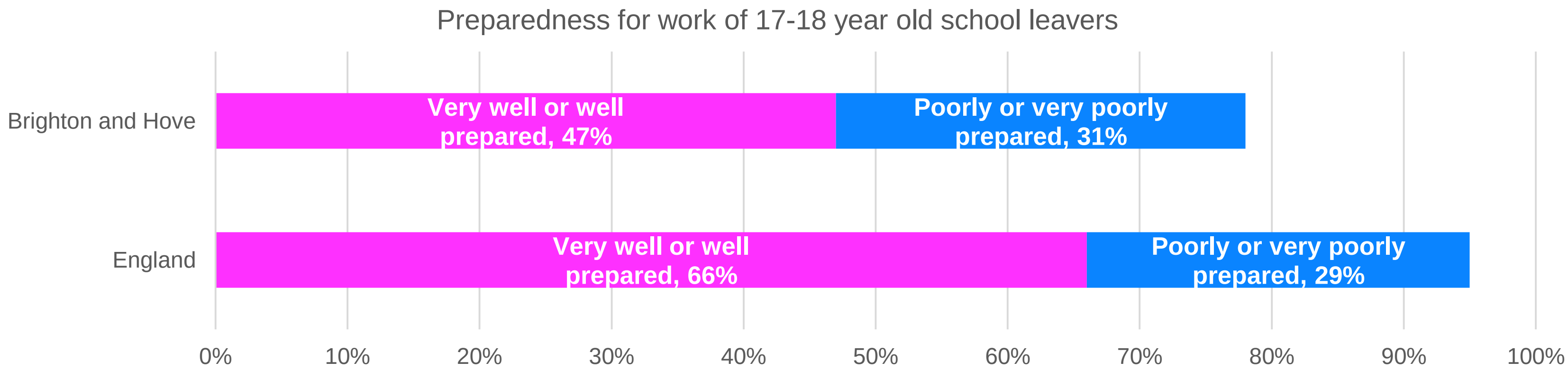
		2013/14	2012/13	2011/12
Key stage 5	%	5%	4%	2%
	No.	~100	~30	~40
Key stage 4	%	3%	2%	3%
	No.	~70	~50	~80

Source: Department of Education Destinations of key stage 4 and key stage 5 pupils and Brighton & Hove Post 16 team

Brighton & Hove City Council

4.3 Employers' perspective on the work readiness of young people in Brighton & Hove in 2013

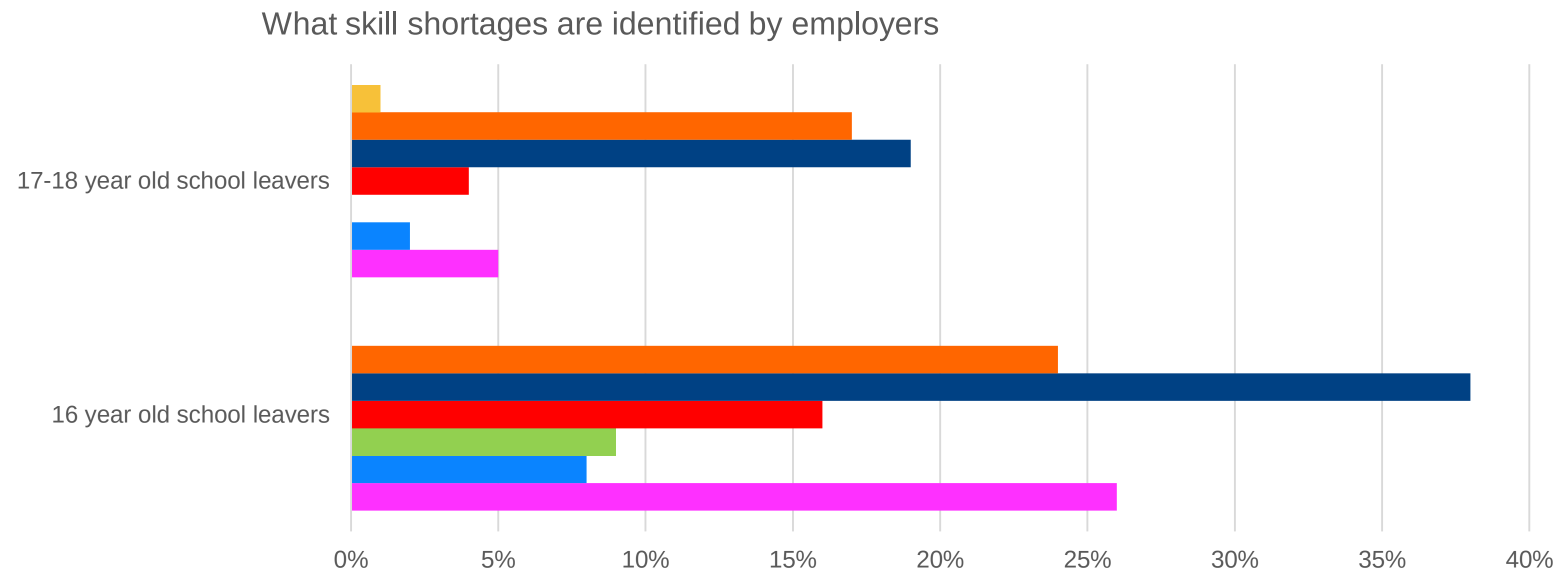




The 2013 UKCES survey 2013 asked employers who had employed young people in the last 2-3 years whether these employees were ready for work. Employers report that many young people leaving school are not well prepared for work in the City and it compares much worse compared to the English average. This reduces however dependent on the age of the young person. At age 16, employers state that 62% of young people are poorly or very poorly prepared however this reduces to 31% for those that are between 17-18, suggesting that elements of post-16 support are helping to support work readiness. Although this is still less than 50% saying that young people are very well or well prepared -focusing efforts on improving work-readiness support in schools is important.

Brighton & Hove City Council

4.4 Employers reported a range of gaps mostly soft skills and attitudinal/behavioural in 2013



	16 year old school leavers	17-18 year old school leavers
Other	0%	1%
Lack of working world / life experience or maturity	24%	17%
Poor attitude / personality or lack of motivation	38%	19%
Lack of common sense	16%	4%
Poor education	9%	0%
Literacy/numeracy skills	8%	2%
Lack required skills or competencies	26%	5%

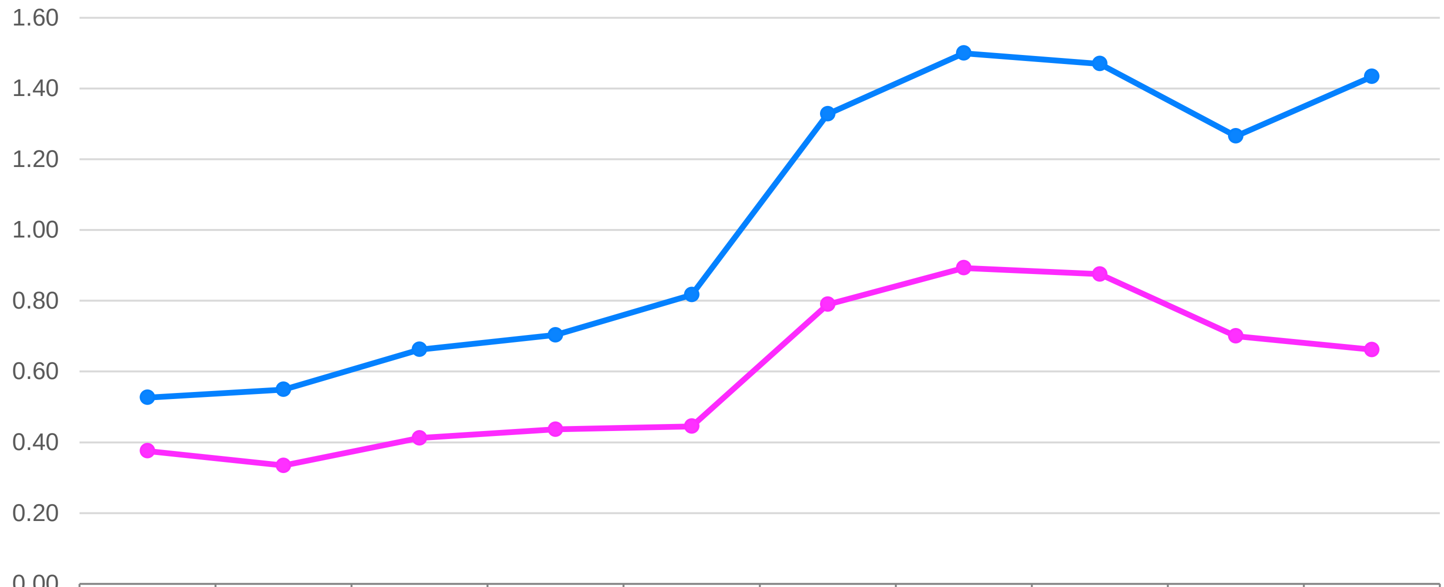
There are differences in the skills shortages identified by employers between 16 and 17-18 year olds. However there are common issues which are less related to technical and work related skills but are focused around softer skills and behavioural/attitudinal issues. Improving understanding of the working world, working attitudes and motivation appears equally important as providing the required skills and educational achievements. Work experience and appreciation of different employment environments could go someway to addressing these shortfalls.

Source: UKCES Employer Skills Survey 2013

Brighton & Hove City Council

4.6 There are fewer Apprenticeship starts and completions in Brighton & Hove

Percentage of working age population starting Apprenticeships every year



	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
Brighton and Hove	0.38	0.33	0.41	0.44	0.45	0.79	0.89	0.87	0.70	0.66
England Total	0.53	0.55	0.66	0.70	0.82	1.33	1.50	1.47	1.27	1.43

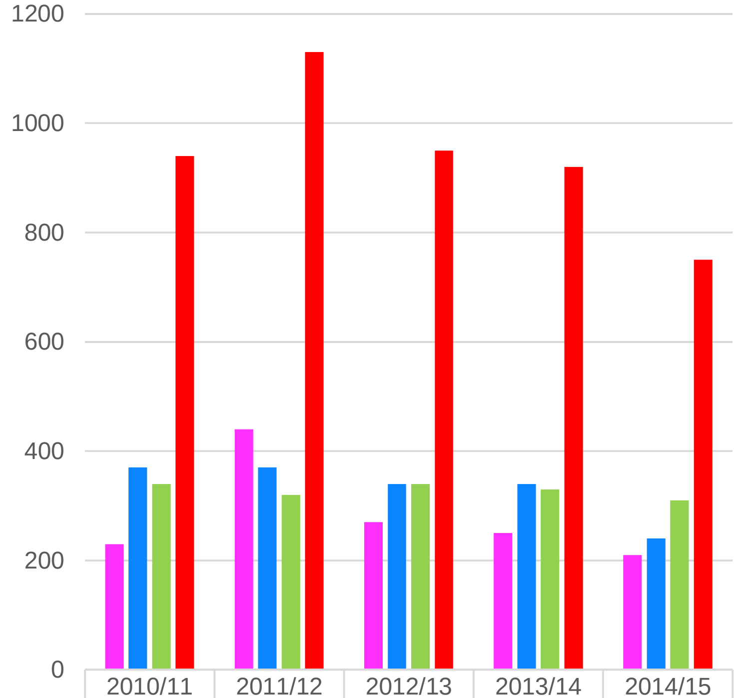
Evidence suggests that people completing apprenticeships at all levels is increasing. However, compared with other areas in the Coast to Capital region, Brighton & Hove completions are growing relatively slowly (42% between 2008 and 2014); compared with the best performing area, Croydon – improving by 122%. Brighton & Hove is the only area in Coast to Capital with no completions of advanced level apprenticeships.

Source: ONS mid-year population estimates
Coast to Capital Economic Assessment 2015

Brighton & Hove City Council

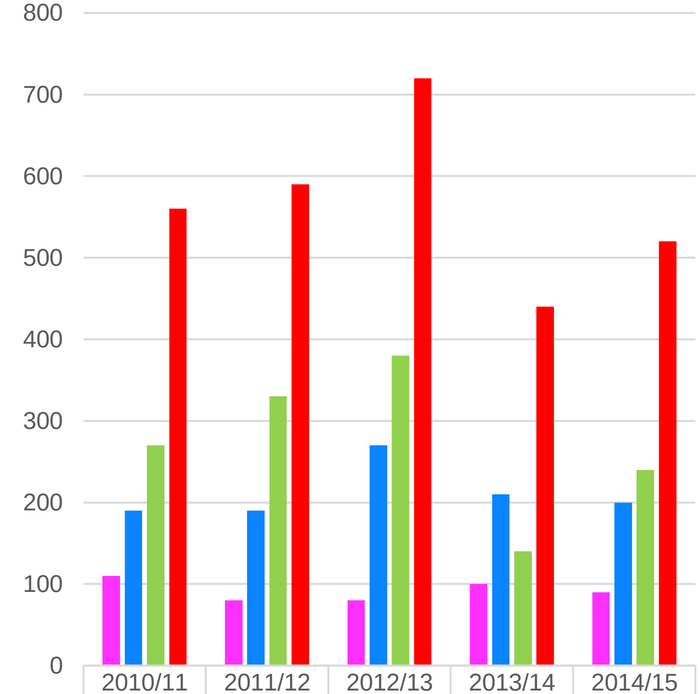
4.7.1 There has been a gradual decline in numbers of apprentices in Brighton & Hove over last five years

Intermediate Level Apprenticeships



	2010/11	2011/12	2012/13	2013/14	2014/15
Under 19	230	440	270	250	210
19-24	370	370	340	340	240
25+	340	320	340	330	310
All Ages	940	1130	950	920	750

Advanced Level Apprenticeships

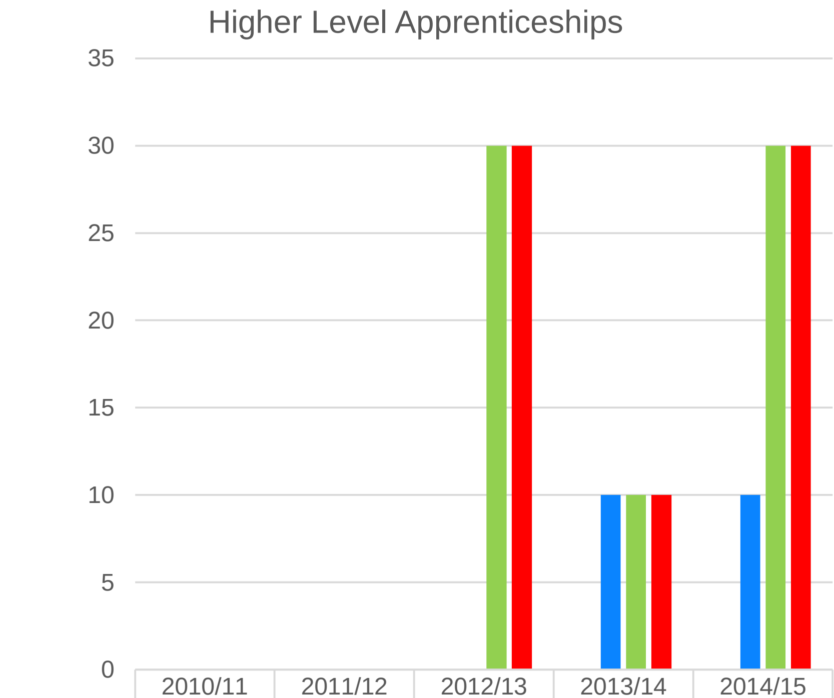


	2010/11	2011/12	2012/13	2013/14	2014/15
Under 19	110	80	80	100	90
19-24	190	190	270	210	200
25+	270	330	380	140	240
All Ages	560	590	720	440	520

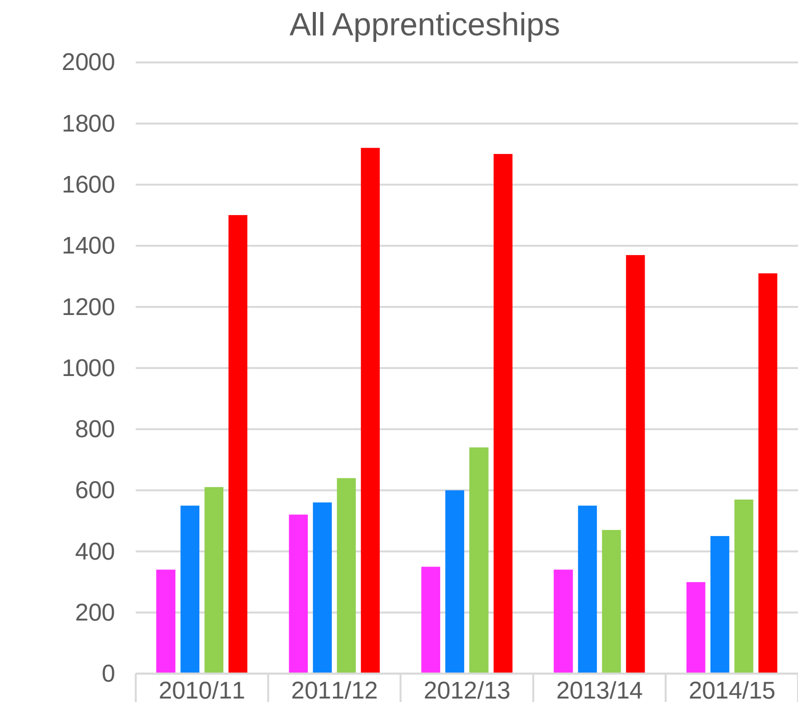
Source: FE Data Library

Brighton & Hove City Council

4.7.2 Employers are using apprenticeships to upskill existing staff



	2010/11	2011/12	2012/13	2013/14	2014/15
Under 19			0	0	0
19-24			0	10	10
25+			30	10	30
All Ages			30	10	30



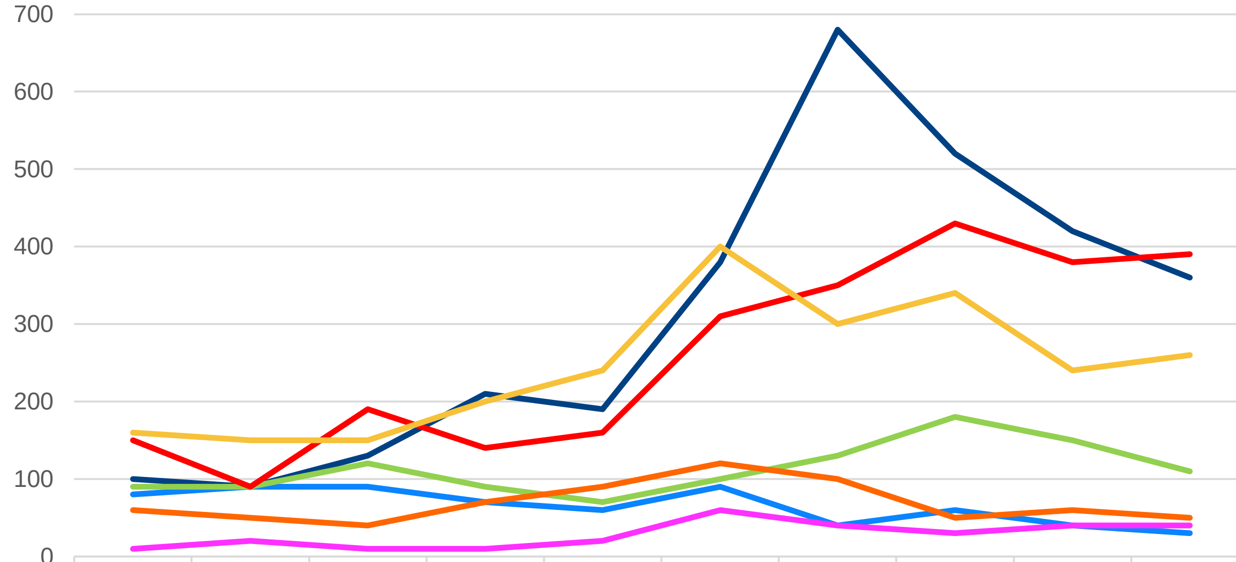
	2010/11	2011/12	2012/13	2013/14	2014/15
Under 19	340	520	350	340	300
19-24	550	560	600	550	450
25+	610	640	740	470	570
All Ages	1500	1720	1700	1370	1310

There has been an overall decline in the numbers of apprenticeships in the City since 2010. Breaking this down by level and age of apprentices there are patterns in participation levels between the under 19, 19-24 and 25+ age groups. The 25+ age group overall has a higher number of apprenticeships compared with the other two age groups, suggesting that employers are using apprenticeships to upskill existing staff.

Source: FE Data Library

Brighton & Hove City Council

4.8 A possible mismatch in apprenticeships compared to skills needs in the City.



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Business, Administration and Law	100	90	130	210	190	380	680	520	420	360
Construction, Planning and the Built Environment	80	90	90	70	60	90	40	60	40	30
Engineering and Manufacturing Technologies	90	90	120	90	70	100	130	180	150	110
Health, Public Services and Care	150	90	190	140	160	310	350	430	380	390
Information and Communication Technology	10	20	10	10	20	60	40	30	40	40
Leisure, Travel and Tourism	60	50	40	70	90	120	100	50	60	50
Retail and Commercial Enterprise	160	150	150	200	240	400	300	340	240	260

There has been an increase in the provision of apprenticeships with a large increase in 2011 for business administration, although this has reduced the key areas where there are greater apprenticeships are in the health, business admin and retail/commercial areas. Apprenticeships in Leisure, ICT and construction have declined since 2010 and engineering and manufacturing returning to the same level ten years ago. The new Construction Centre should help to elevate figures in this sector but it will be important to ensure that apprenticeship provision reflects sector needs in the City. Some sectors are not represented here due to very low numbers of apprentices, such as agriculture, horticulture and animal care, education and training and science and mathematics.

Source: FE Data Library

Brighton & Hove City Council

Data sources

NOMIS annual population survey – workplace analysis July 2014 – June 2015

NOMIS – Jobseeker's Allowance by age and duration with proportions

NOMIS – Benefit claimants – employment and support allowance

NOMIS – annual survey of hours and earnings

NOMIS – mid-year population estimates

NOMIS – Benefit payments – job seeker's allowance

NOMIS annual population survey

NOMIS annual population survey – economic activity

National Statistics – GCSE attainment rates

Department of Education – destinations of key stage 4 and key stage pupils

Brighton Fuse Second Wave Firms Survey

ONS mid-year population estimates

Coast to Capital Economic Assessment 2015

UKCES Employer Skills Survey 2013

UKCES Employer Skills Survey 2015

UKCESS LMI Coast to Capital Report 2015

Briefing: English Indices of Deprivation 2015 and Index of Multiple Deprivation 2015

2011 Census merged local authority district

Centre for Cities Outlook 2016