

Annex 1



BCP Skills Plan 2022-2026

Economy, Labour Market & Skills Data Pack

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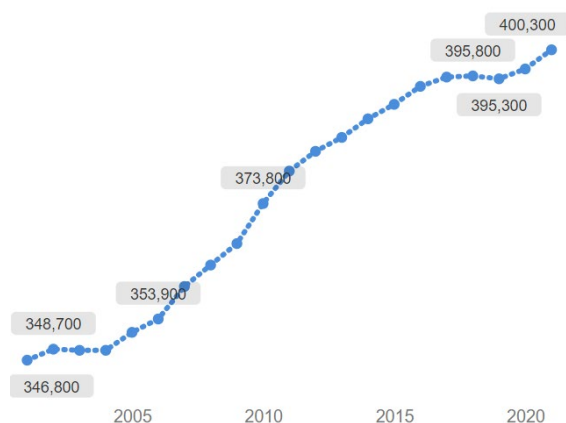
Part 1 | Local Landscape

Population

Population (2021)*

400,300

Population Estimates**



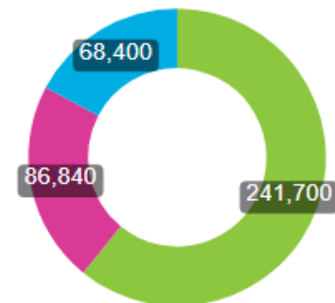
Aged 50-64

76,000

Aged 0-15

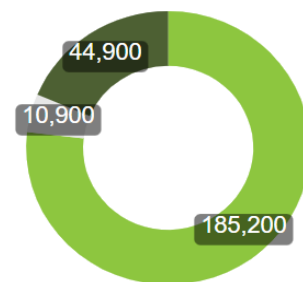
68,400

Working age population



16-64 Working Age Population Retired Age Under 16

Labour Force



Employment Unemployed Inactive

Figure 1. Census 2021, ONS population estimates (upto 2020), age distribution and expected replacement demand. ONS Population estimates 2020

The latest Census has shown that the BCP population has reached over 400,000 residents in 2021, but there are fewer working age and younger people, significant economic inactivity, and higher proportions in or nearing retirement. With up to a third of the workforce expected to move into retirement (76,000 aged 50-64, 31% of the workforce), and fewer young people in the pipeline to enter the workplace over the next 15 years (68,400 aged 0-15), 'replacement demand' is already outweighing the supply, notwithstanding new jobs creation (14,000 new jobs by 2030).

Age profile

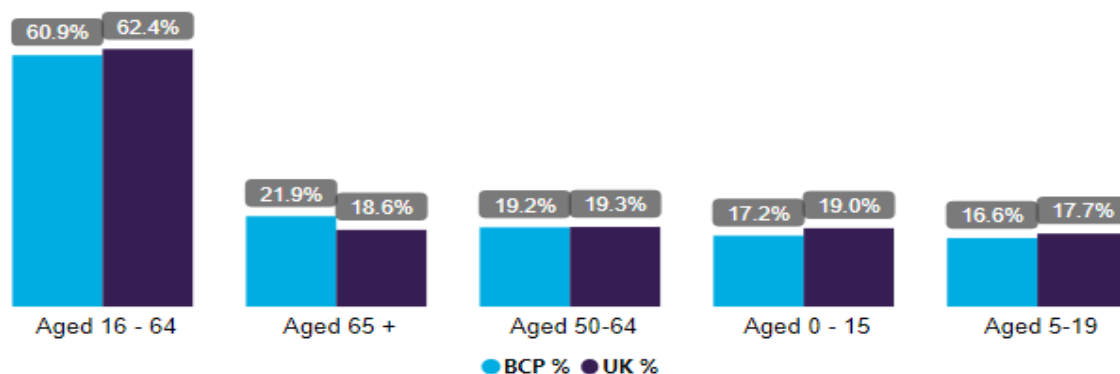


Figure 2. ONS Population estimates 2020

Employment

Historically, local employment indicators have compared favourably to the national rates with consistently higher economic activity and employment rates and lower unemployment. However, the past two years (2020-21) saw seismic shifts that shook the BCP labour market more severely than the rest of the UK. After a year of record employment levels in 2019 (81%), and despite the cushioning effects of the furlough scheme, the pandemic resulted in 4 percentage points decline in employment rates at the close of 2021 (compared to only 1 ppt decline nationally) and 11,600 fewer people in employment across BCP. The past year also saw unemployment rates locally exceeding the national for the first time on record with 6,000 more unemployed in 2021 than back in 2019. Those economically inactive reached 44,600 – a 6% increase on 2019 - and just 7,800 of them wanted a job. The rate of self-employment - traditionally higher in BCP (10.5% in 2021 vs to 9.3% UK), which could be an indicator of entrepreneurial culture but could also suggest precarious employment. Self-employment declined significantly in 2020, when movements from self-employment to employment were at their highest for 20 years but got slowly back on a growing trajectory in 2021.

Employed (2021)

185,900

Employment rate (aged 16-64)

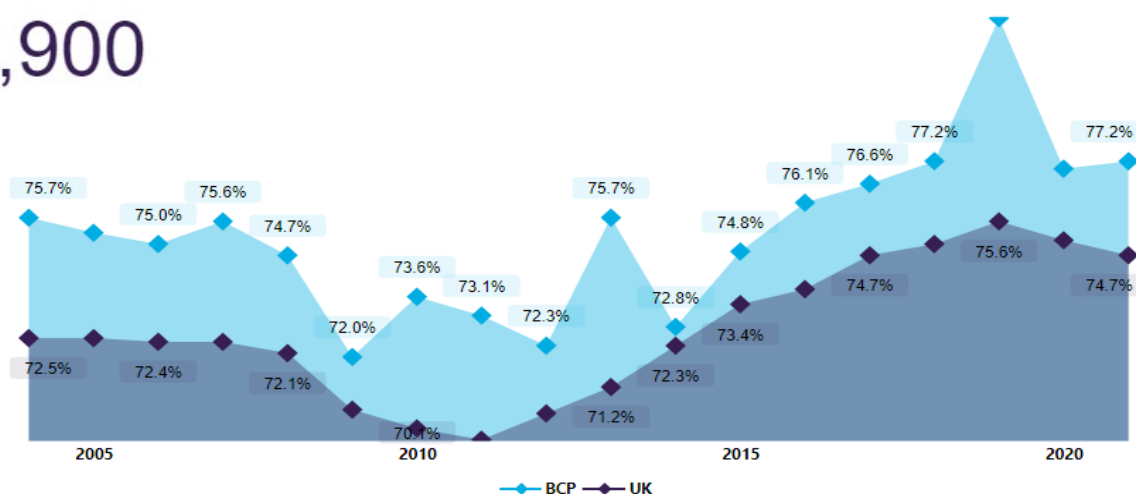


Figure 3. Employment rates BCP and UK. Annual Population Survey, Jan- Dec, 2004-2021

Unemployed (2021)

10,400

Unemployment rate (aged 16-64)

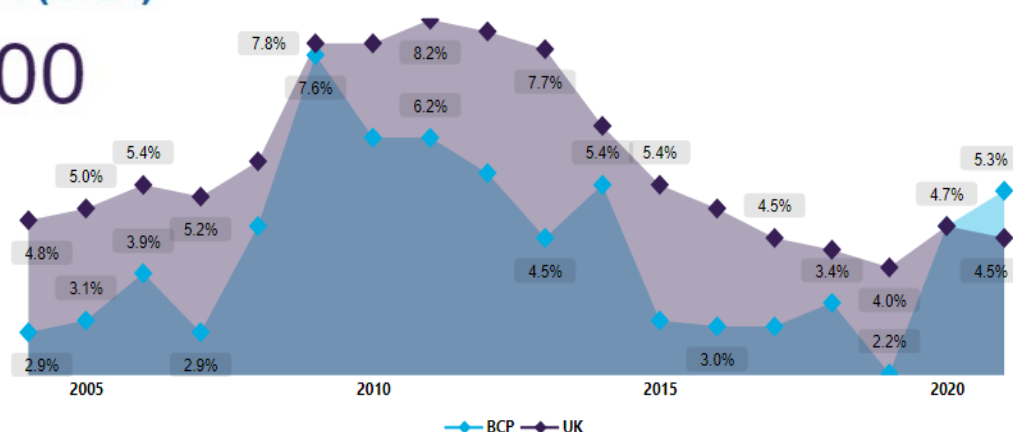


Figure 4. Unemployment rates BCP and UK. Annual Population Survey, Jan- Dec, 2004-2021

Claimant count

The Claimant count statistics illustrate the dramatic impact of the COVID 19 pandemic and related economic closures on the labour market and employment displacement over the past two years that have spilled into 2022.

The first wave of the pandemic and initial lockdown caused unemployment related claimant numbers to almost triple in the region over the first half of 2020, proportions reaching 6.6% of the working age residents in May 2020 – a 4 percentage points increase from the 2.5% at the beginning of the year. Many workers were displaced and 74,200 were furloughed at some point over the 18 months of the Coronavirus Job Retention Scheme's existence (closed in September 2021), representing 40% of all in employment in BCP– a staggering figure painting the effects of the pandemic on local industry, employment and economic activity, particularly on young people.

The number of people claiming unemployment related benefits remained stubbornly high throughout 2020 and the first months of 2021, but with a boom in job vacancies and a wide range of return-to-work interventions outlined in the Chancellor's Plan for Jobs, number have since been declining in a consistent, albeit slow rate and settling at 3.6% with 8,980 claimants in May 2022 – but still exceeding pre-pandemic levels by 32%.

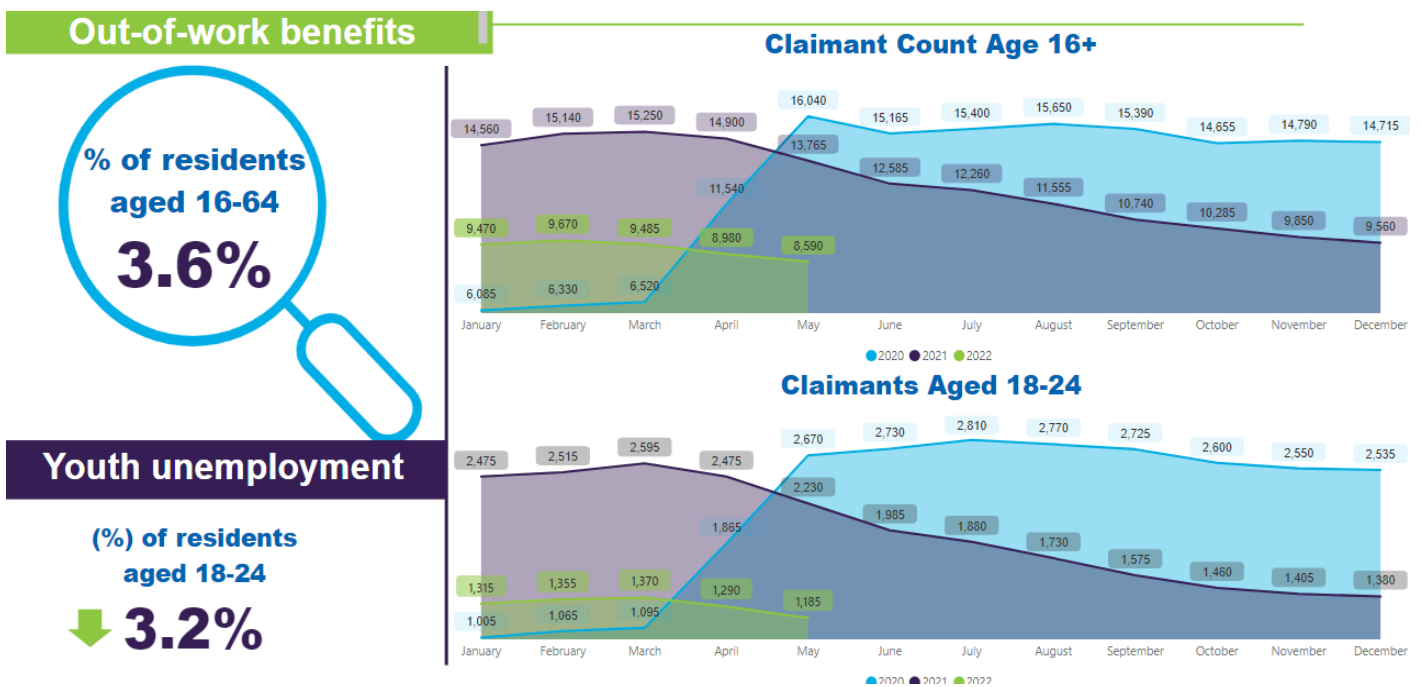
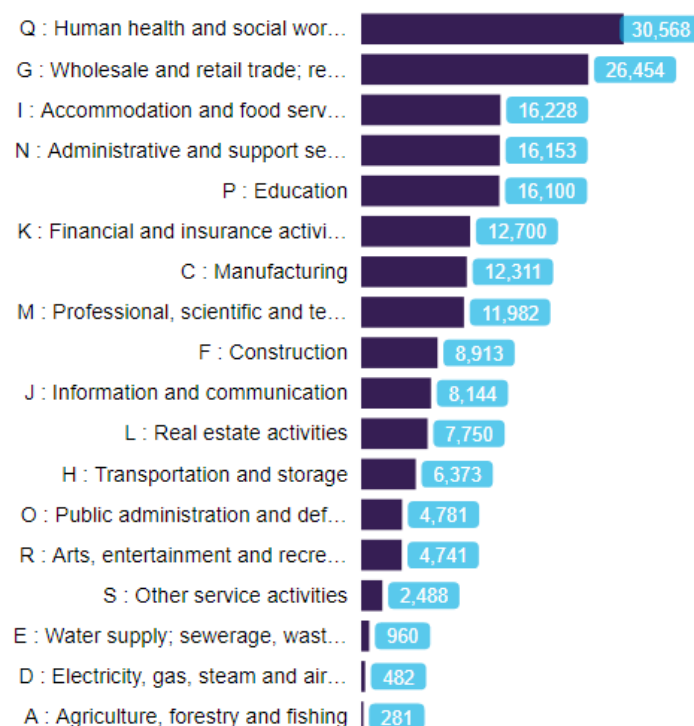
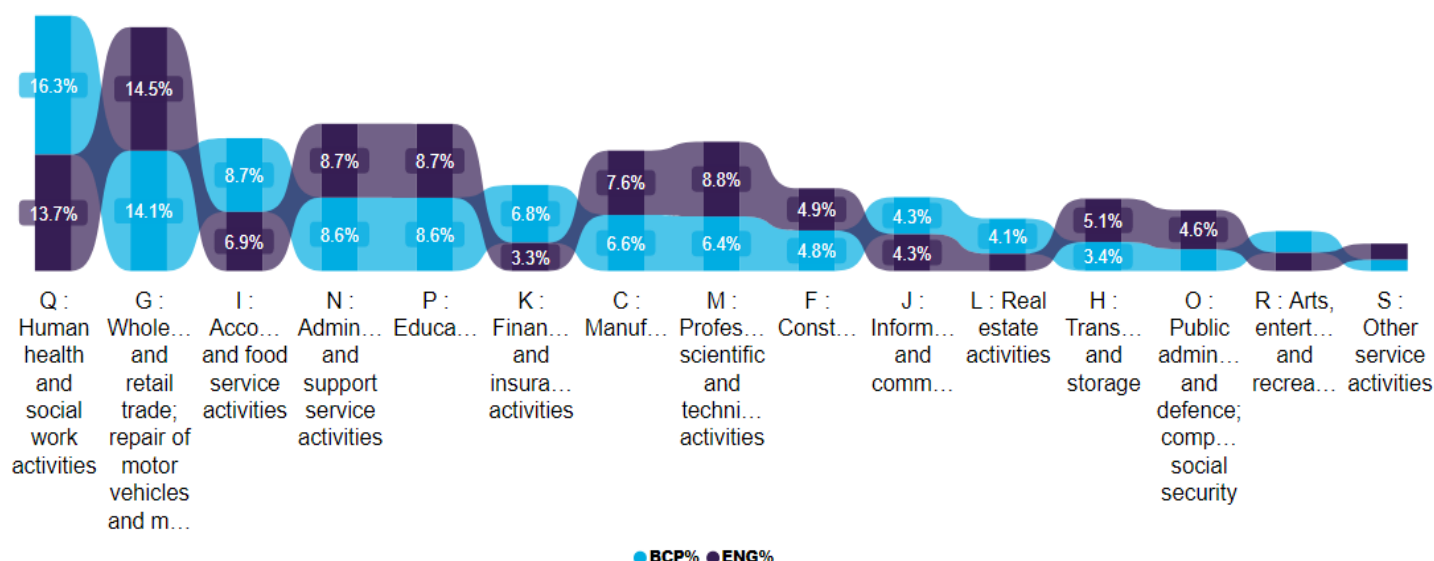


Figure 5. ONS Claimant Count

Employment by sector

BCP's industry profile is similar to the broader UK picture with healthcare, tourism and hospitality among the largest employment sectors, jointly employing circa 40% of the workforce, with 35% national reference. There is also some prevalence of lower skilled and lower paid jobs across these sectors. Reflecting our geography, demographic profile and economic strengths, there is higher concentration of employment in financial services, real estate, tourism & hospitality, arts & entertainment, and healthcare, whilst agriculture, transport, energy, utilities and professional activities are less prevalent than nationally.



Average wages

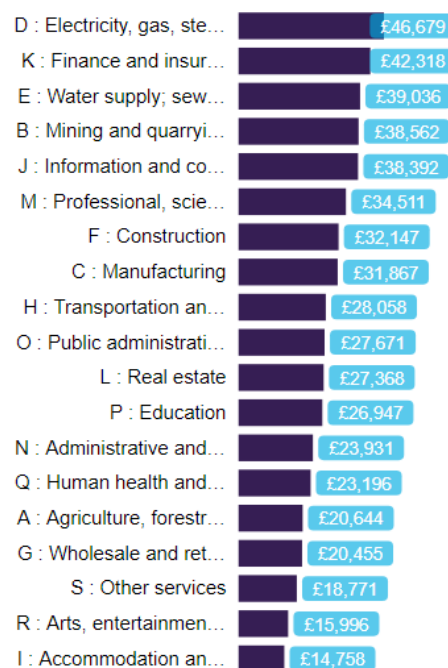
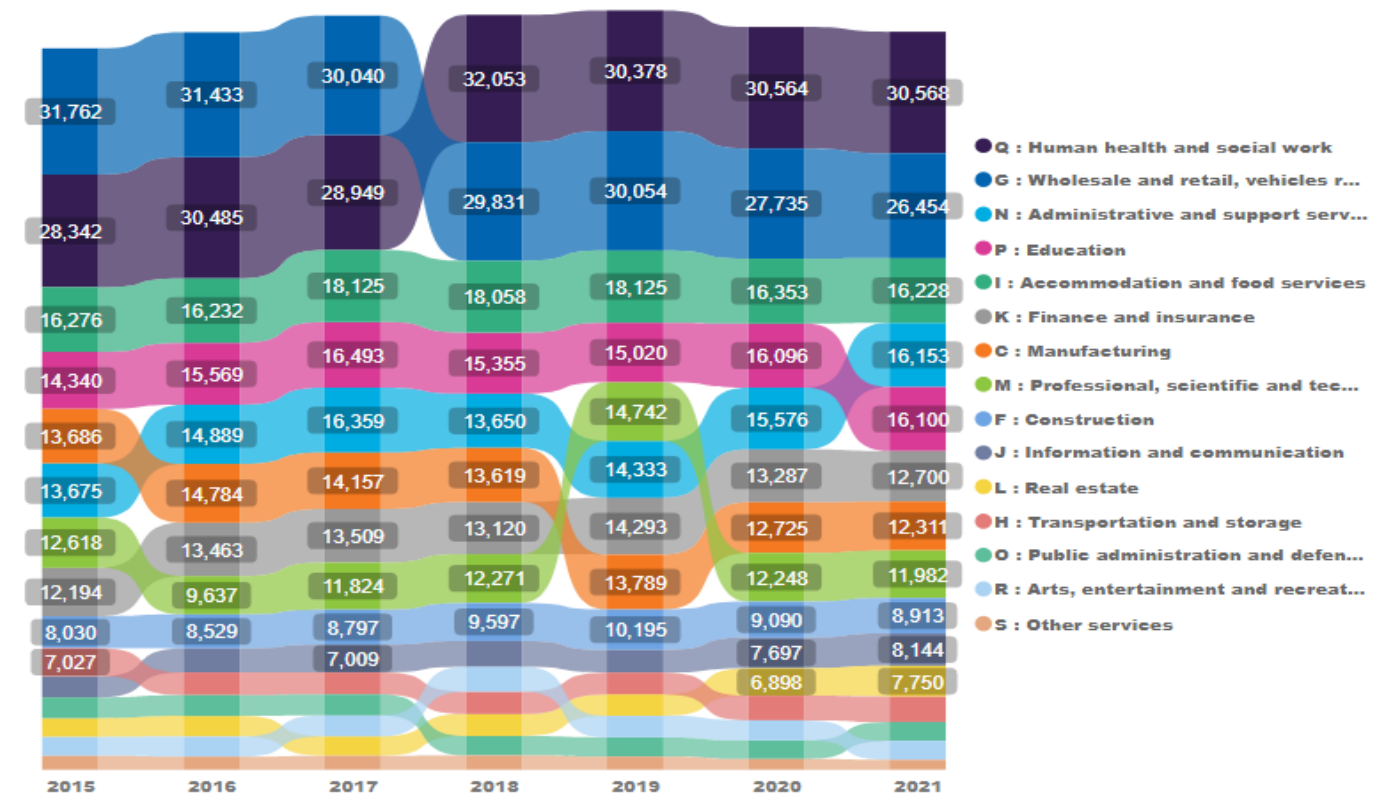


Figure 6. Employment and wages by sector EMSI Analyst 2022

Sector employment levels display a relatively stable picture with some fluctuations in staffing levels across industries over time. Over the past 6 years, proportional increases in employment of over 50% were recorded in real estate (3,000/ 63% $\uparrow$) and information and communication tech (2,800/ 52% $\uparrow$), while retail saw the largest aggregate decline in numbers with 5,300 (17% $\downarrow$) fewer employed in the sector in 2021 than 6 years earlier.



2015 - 2021 Change

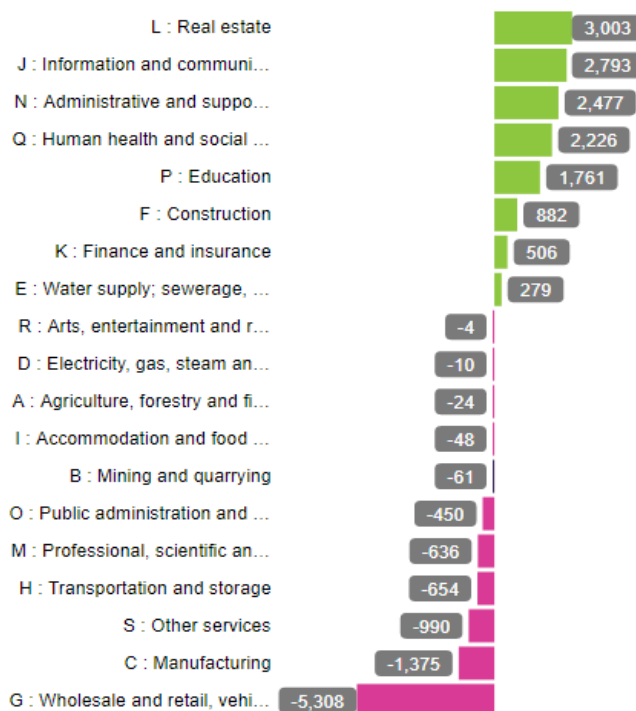


Figure 7. Employment developments across sectors 2015 - 2021. EMSI Analyst

Productivity by sector

There was a 4% decline in Gross Value Added produced across BCP industries in 2020 on the previous year, illustrating the effects of the pandemic restrictions across sectors. Throughout the year, the most value was produced by real estate, financial service, healthcare, retail, manufacturing and construction activities. The sectors with largest growth between 2010 and 2019 were arts and entertainment, ICT, utilities, professional services and construction, which all increased their productive output by more than 60% over that period. However, the 2020 pandemic restrictions affected the majority of sectors, and growth was recorded only in the essential areas of healthcare, education, public services and ICT, while the largest decline of over 40% was recorded in accommodation and food service activities, as the sector remained largely closed over most of the year.

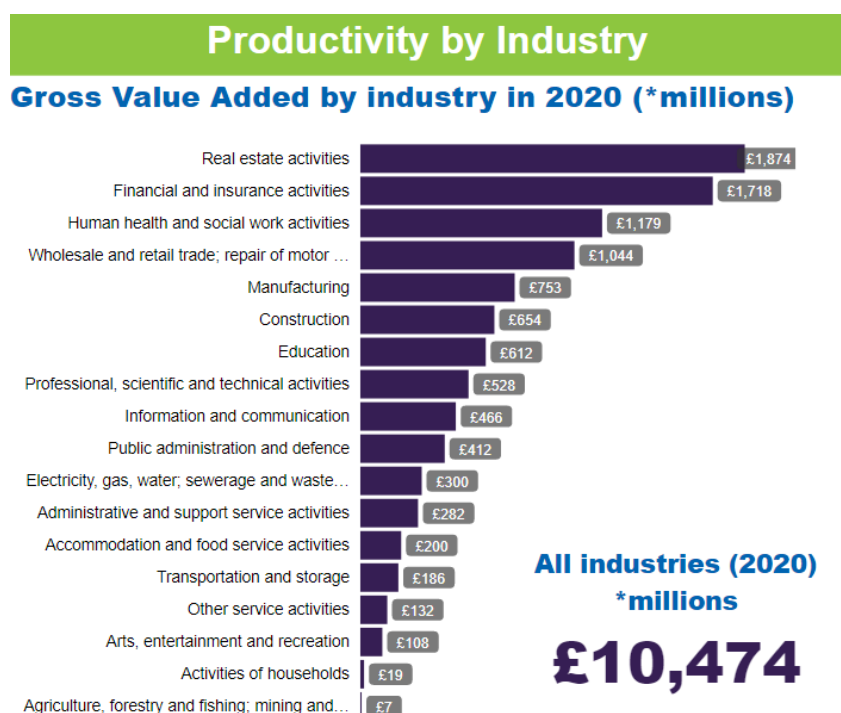
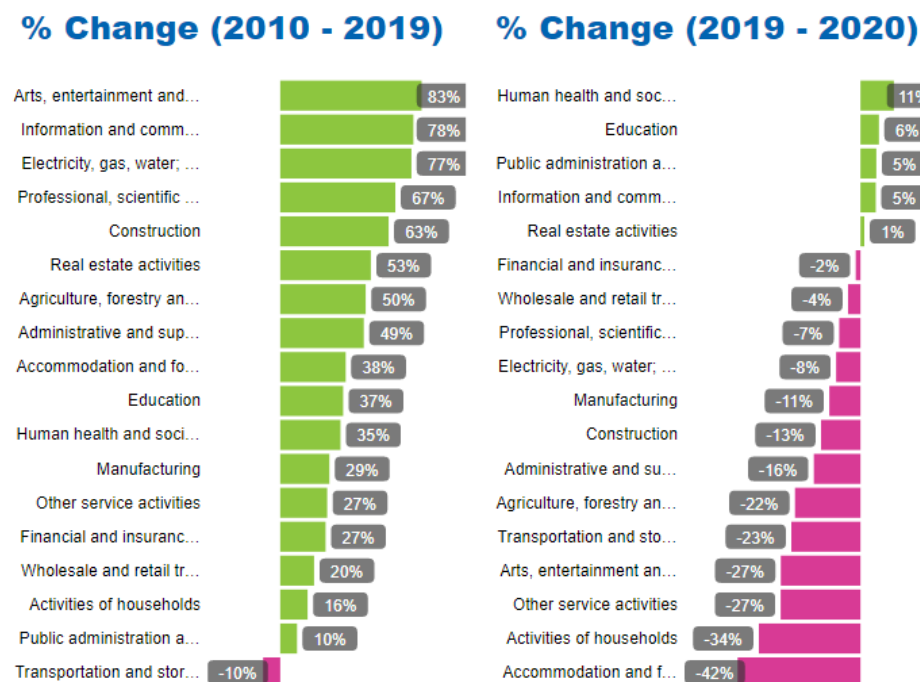


Figure 8. GVA produced by industry in BCP. ONS, Regional gross value added (balanced) by industry: all regions, 2020, published May 2022.

Note. see GVA definition in [Glossary](#)



Employment by occupation

BCP's occupational profile very closely mirrors the national with higher proportions engaged in 'administrative', 'caring' and 'sales and customer service' occupations and fewer employed as 'skilled traders' and 'process, plant, and machine operatives'.

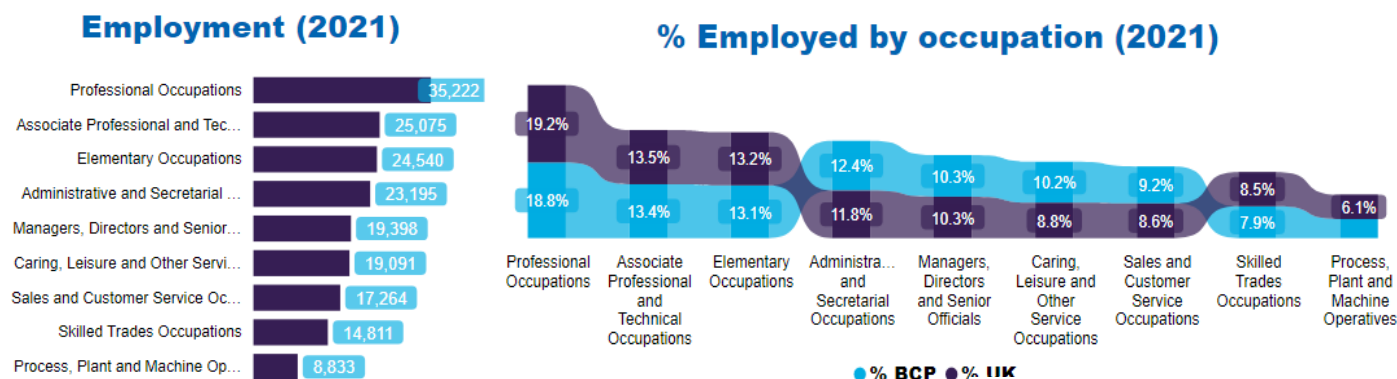


Figure 9. Employment by occupation – Annual Population Survey, EMSI Analyst (2021)

While the workforce occupational structure of the region has been largely maintained, there are long-term shifts, accentuated through existing demographic, consumer, and economic forces, as well as the impact of Covid-19 and Brexit. In combination the emerging patterns suggest a continuing polarisation of demand for skills, with some growth at both high and low skill levels and a hollowing out in the middle¹. Between 2015 and 2021 for example, the largest increase in BCP was noted in the proportions of people employed in professional, associate professional, caring, and elementary occupations whilst sales and process occupations declined.

2015 - 2021 Change

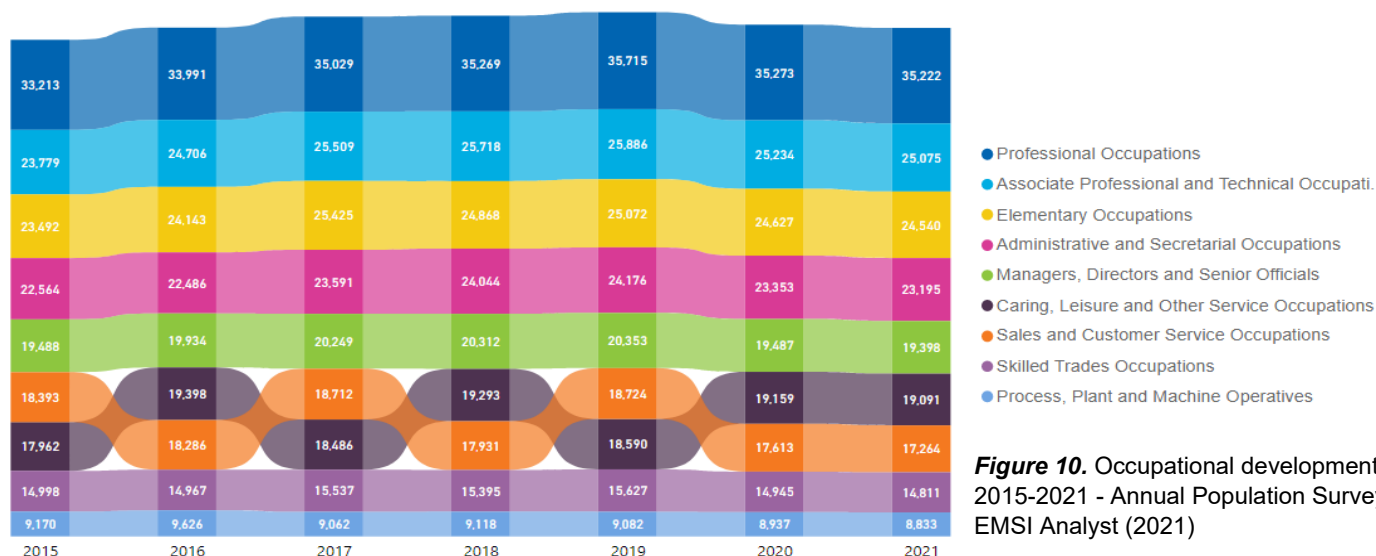
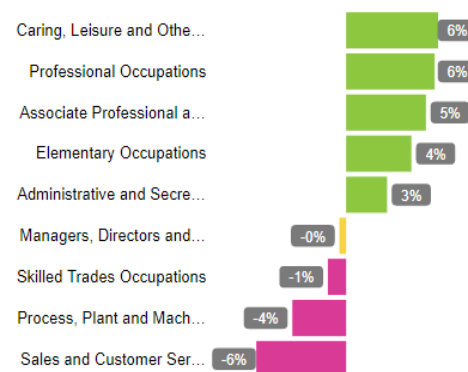


Figure 10. Occupational developments 2015-2021 - Annual Population Survey, EMSI Analyst (2021)

¹ [Working Futures 2020](#)

The **Standard Occupation Classification (SOC)** offers an approximation of occupations that require high, medium or low skills and linked levels of education and how this relates to salaries and future developments.

In line with national levels, circa 42% of BCP's workforce (n=75,500) is engaged in high skilled occupations. These jobs, particularly professional, are expected to dominate the labour market going forwards, and are growing at a higher rate than nationally in the region.

Table 1. Standard Occupational Classification (SOC)

SOC 1-3 Digits	High skilled jobs
1 – Managers 2 – Professionals 3 – Associate Professionals	Require graduate level education in general
SOC 4-6 Digits	Med-range skilled
4 – Admin 5 – Skilled trades 6 – Caring, leisure, service	Mostly require a Level 3-5 education
SOC 7-9 Digits	Low skilled jobs
7 – Sales 8 – Process, machine operatives 9 – Elementary	Mainly Level 2 qualifications and below

Higher-skilled occupations are naturally offering higher salaries, lower automation risk (between 7-14% of tasks) and the largest number of annual job openings (6,700 per annum on average). The rest of the workforce is engaged in mid-skilled (30%) and lower-level roles (28%), which, except for skilled trades and process and plant operatives, offer lower wages predominantly, despite a maintained or growing employer demand.

Given the repetitive nature of some of the work across these occupations, there is higher potential for automation of tasks, ranging from 29% of caring roles to 69% of elementary roles. With high employer demand for both caring and elementary workers and acute labour shortages reported in the context of tight labour market with limited supply, investment in innovative working practices and automated functions could offer solutions for the future.

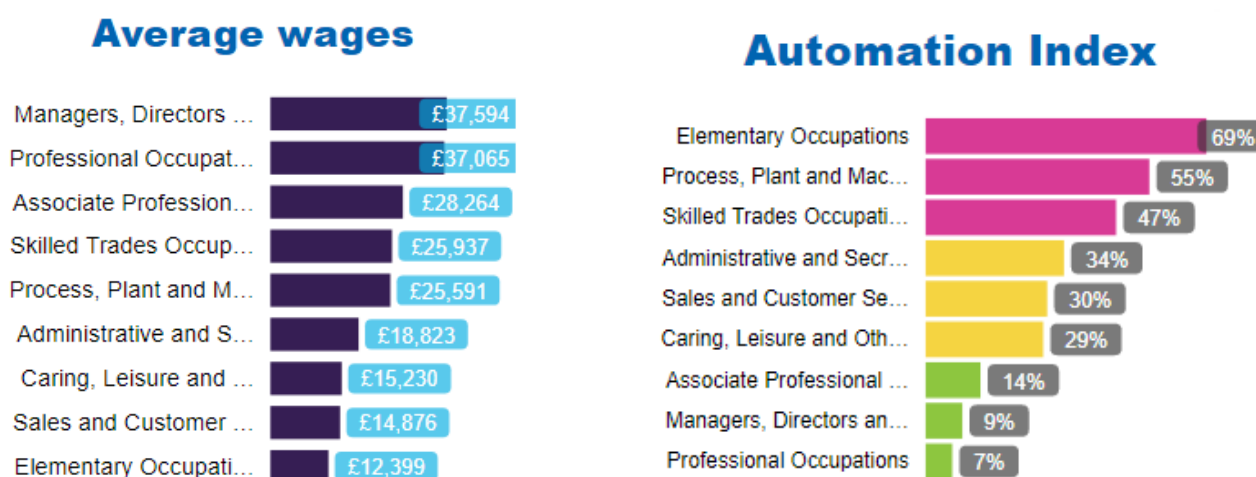


Figure 11. BCP occupations – average earnings and automation. EMSI Analyst

Enterprise

The vast majority (89%) of businesses in BCP are micro enterprises, employing less than 9 people. Small businesses, employing between 10 and 49 workers account for 9% of the BCP enterprise make-up and the remainder 2% are medium or large companies employing 50+ employees. This is in line with the national proportions with slightly higher representation of medium and small enterprises in BCP.

Looking at the VAT or PAYE registered businesses that are active on the Inter-departmental Business Register at the end of the financial year, the number of businesses in BCP increased by 0.8% in 2021, following a 0.1% decline in 2020.

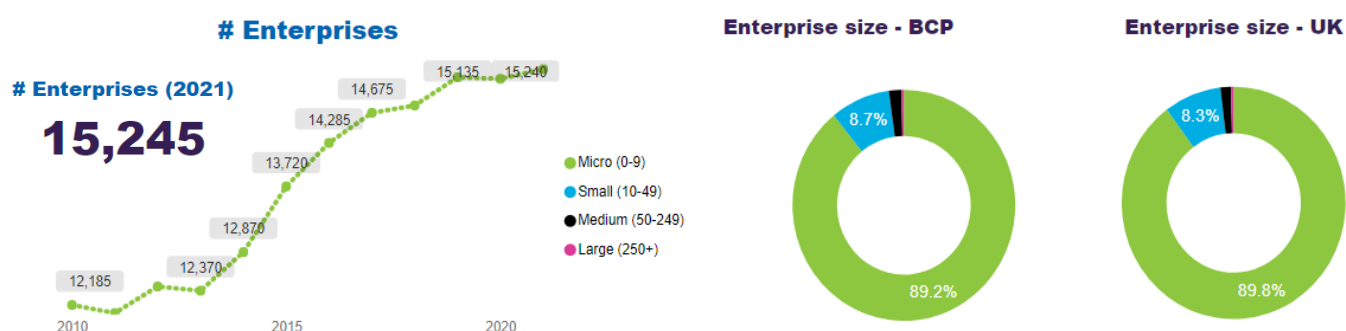


Figure 12. Enterprises by employment size band. ONS UK Business counts, 2021

The increase was solely in micro business, whereas some decline was seen across small, medium and large enterprises, most notably a 15% decline in the number of large businesses in the region between 2019 and 2021, which compares to only 1% decline in England over the same period. This illustrates some resilience and strength within the micro business arena and highlights the critical role micro businesses have played for local communities during these challenging times, not least supporting local economic growth and employment. Given their profile, further focus might be required on particular needs of micro and small businesses in order to support their ongoing success, while also tackling the concerning trends of large enterprise decline.

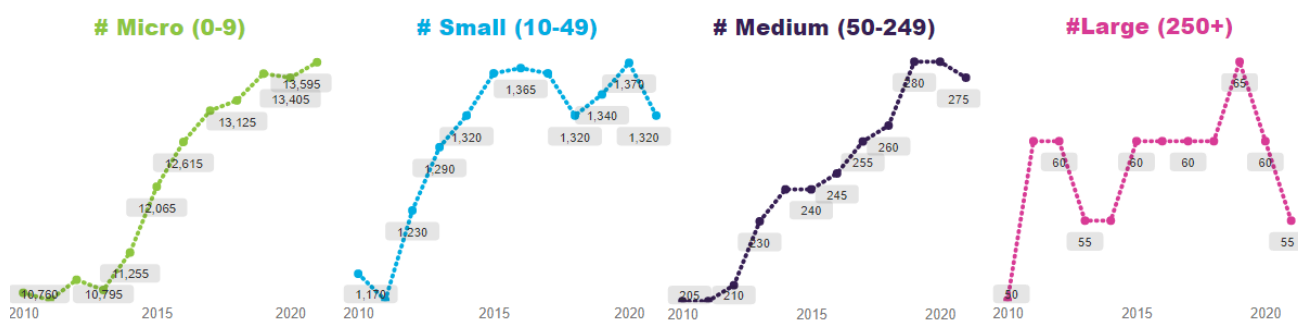


Figure 13. Enterprises by employment size band time series. ONS UK Business counts, 2021

Business demography

BCP prides itself with a thriving start-up scene. The Centre for Entrepreneurs firmly placed the area among the top UK entrepreneurial hotspots in 2020, ranking BCP 2nd in the South West only following Bristol and 16th among 347 UK areas². BCP has 10 start-ups per 1,000 population – a proportion significantly higher than the regional average of 7 per 1,000.

Measures of start-up births and deaths indicate how conducive the local environment is for new business growth and in BCP these are close to the national average, which is skewed by major city regions like London and Manchester. In this context BCP compares well with business birth rates only marginally lower, and with a proportionate lower rate of deaths.

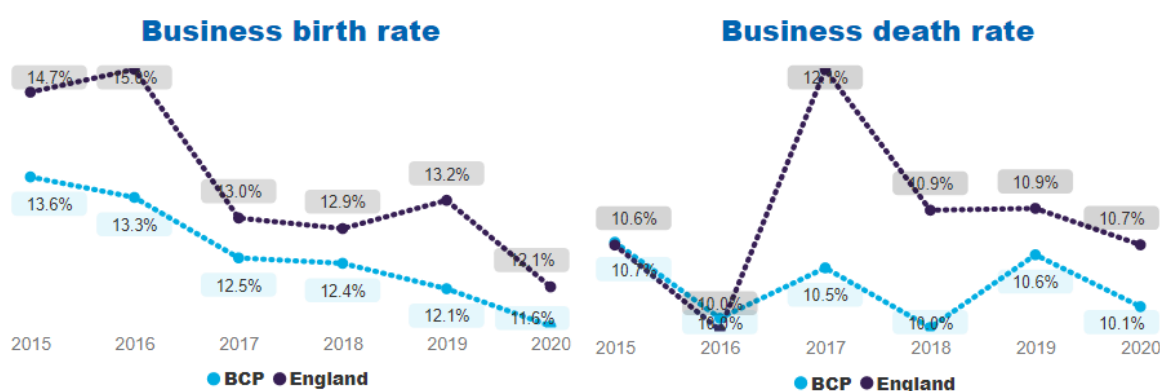


Figure 14. Business birth and death rates. ONS Business demography, 2015-2020 (published Nov 2021)

Business start-ups are a key driver of employment, economic growth, and productivity, but many of them fail within their first years of existence. Business survival rate is therefore an important indicator for sustainable business growth and the region maintains higher than average business survival rates (56% 3-year survival vs 52% nationally).

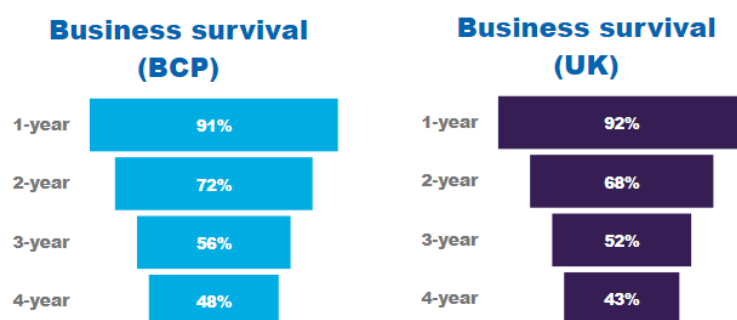


Figure 15. Business survival rates in 2020 of the 2016 business births. ONS Business demography, 2015-2020

Many surviving start-ups however, remain small. The proportions reaching higher turnover (£1m+) is therefore an indicator for long-term growth and BCP aligns with national average on that measure with 65 (0.4%) of its active businesses being high growth enterprises in 2020³. However, that figure marks a 19% decline in high-growth enterprises since 2018.

² Centre for entrepreneurs. Business Start-up Index.2020

³ ONS Business demography, 2015-2020

Productivity

One of the most important factors in determining living standards is productivity – how much output is produced for a given input. The region's productivity, as measured by Gross Domestic Product (GDP)⁴, has more than doubled over the past 20 years - the products and services produced locally contributing almost 12 billion to the UK economy.

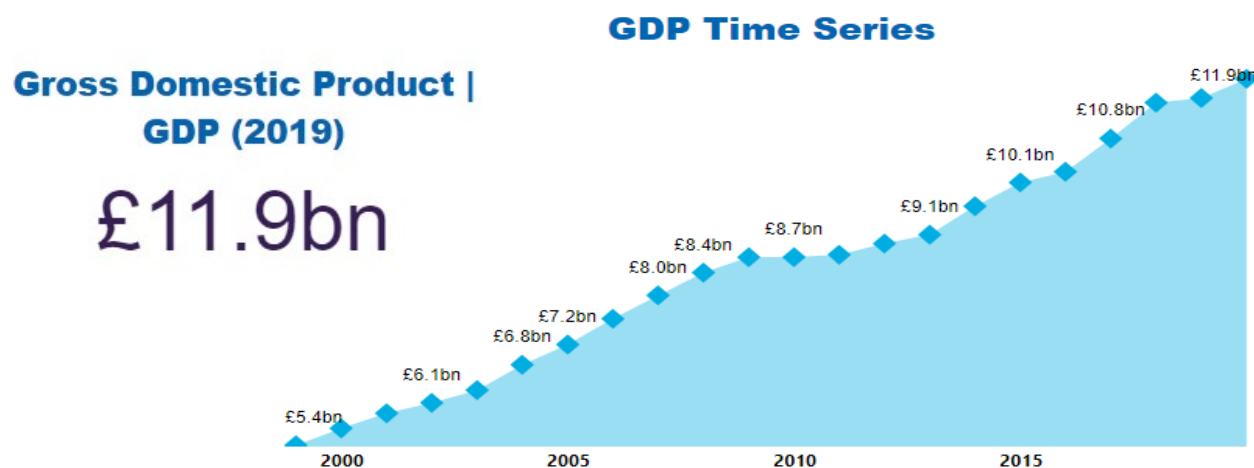
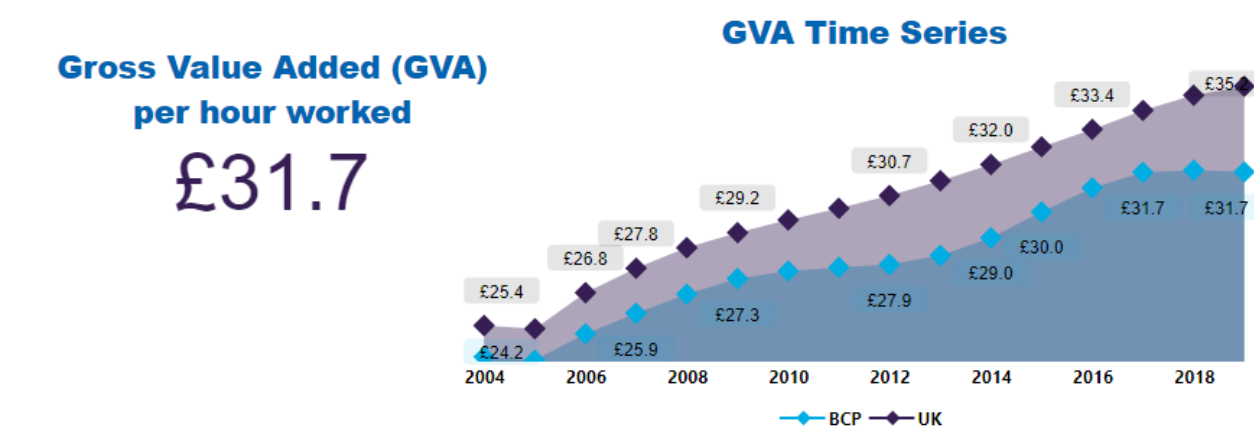


Figure 16. ONS, Regional gross domestic product: local authorities, 2019, released 2021

However, BCP has a performance gap to close. Looking at jobs productivity, in 2019 BCP produced c.£50k of GVA per filled job – 12% lower than the £57k average for the UK. This gap has been persistent and has grown over time from 7% back in 2002.

While labour productivity (as measured by Gross Value Added (GVA)⁵ per hour worked) has risen, growth rate is slower than the national, characterised by a more pronounced scarring after economic downturns. Following the financial crisis of 2008, labour productivity stalled, and while in the later period it began to recover, it stayed largely flat since 2016. This is a common issue as shown when compared to similar areas as a benchmark.



Reference areas

UK	BCP	Dorset	East Hampshire	Southampton	Exeter	Bristol, City	Bath & NES	Plymouth	Portsmouth	Winchester
£35.2	£31.7	£28.6	£32.0	£40.3	£35.8	£31.0	£28.7	£30.2	£34.4	£39.0

⁴ See Glossary - Gross Domestic Product (GDP)

⁵ See Glossary - Gross Value Added (GVA)

Figure 17. BCP Nominal (smoothed) GVA per hour worked – 2019, time series and reference areas. ONS Subregional Productivity, 2014-2019 (published 2021)

The gap between the BCP's and the national labour productivity varied over recent years but reached £3.50 less produced per hour worked in BCP than nationally in 2019.

When applied to the total number of hours worked, this creates an 'output gap' of circa £1.2bn per annum.

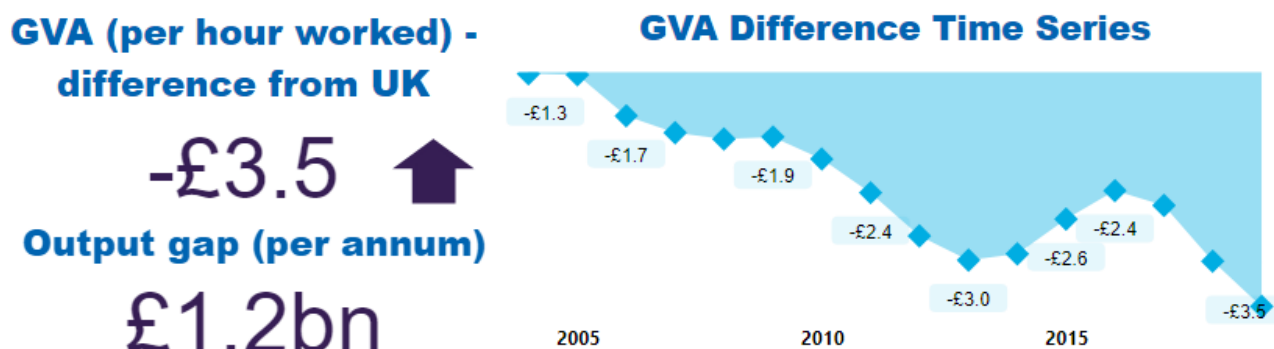


Figure 18. Difference in the BCP Nominal (smoothed) GVA per hour worked from the national average – 2019, output gap and time series. ONS Subregional Productivity, 2014-2019 (published 2021)

Unfortunately, the data available at local level, does not capture the significant economic distress of the past two years and the effects of the pandemic present significant challenges in the measurement of productivity with underlying productivity trends difficult to discern.

Latest [ONS estimates](#) suggest that labour productivity in the UK decreased by 0.7% on quarter in the first three months of 2022, following a 1.3% increase in the previous period, yet it remains 1.9% above its pre-pandemic levels. [Analysts](#) however suggest that no fundamental change in productivity behaviour resulting from the pandemic is yet visible.

The Bank of England's monetary policy report proposed that investment in innovation and digital technologies could boost productivity to a great extent. There could also be greater gains to productivity from working from home in the future, which may allow companies to reduce office space and shift investment away from buildings towards staff training and IT.

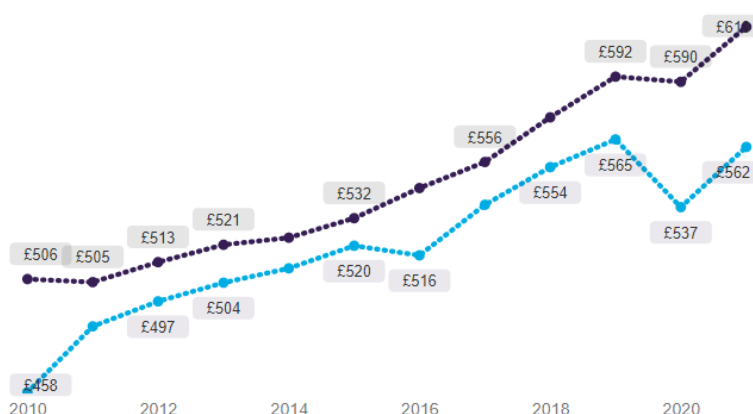
Ensuring both business and management practices, innovation investment at firm level and availability of the right skill mix for the BCP's exemplar sectors is therefore essential in driving growth and productivity forward.

Earnings

Wages of those living in BCP were 8% lower than the average earnings in England⁶ in 2021. Having shown some robustness historically, local earnings saw a marked decline in 2020 and whilst they have been bouncing back at higher than national rate since, the gap has doubled from 2018⁷.

Figure 19. Median gross weekly wage for full-time workers. ASHE.

Median gross weekly wage - full-time workers (Residents)



Note. Shows growth in nominal terms i.e. not accounting for inflation. In real terms, growth has been more muted.

Weekly wages by sex

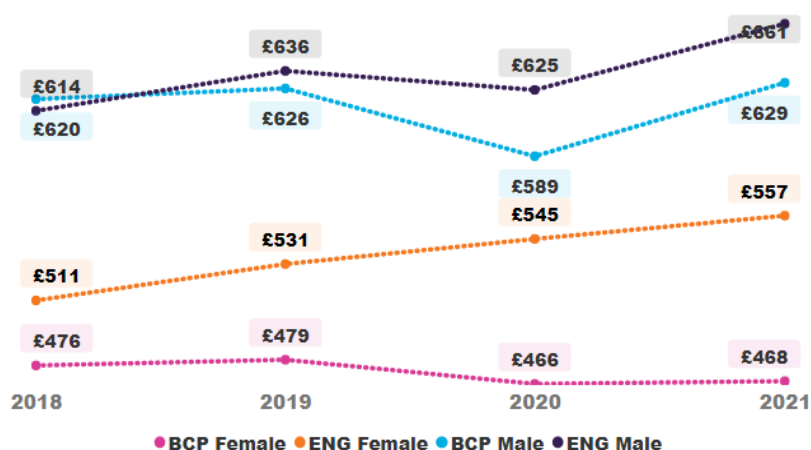


Figure 20. Median gross weekly wage for female and male full-time workers. ASHE.

The gap in earnings is significantly more pronounced for female workers who earn 16% less in BCP than on average in England, whilst local men earn 5% less. The gender pay gap in the region has grown in recent years and reached 26% in 2021 compared to 16% in England, with women's wages in BCP seeing further decline recently.

Earnings by area 2021



Figure 21. Median gross weekly wage for full-time workers across local areas. Annual Survey of Hours and Earnings. **Note.** Data at smaller geographies is subject to relatively wide confidence intervals. **Note.** Parliamentary constituencies partly extend beyond the BCP Council boundaries – see map in [Glossary](#)

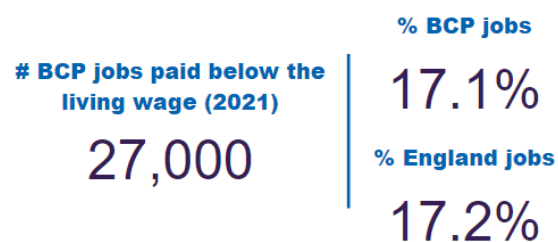
There is also significant variance in the distribution of earnings across local areas, most notably the average earnings per week of those residing in Christchurch were 43% higher than those in Bournemouth West⁸.

⁶ Note the national average is influenced by higher earnings within London and Greater South East.

⁷ ONS suggests exercising caution when comparing wages over the past two years as there are many temporary factors at play. Another caution is the potential unreliability of historic comparisons with changes in local authority administrative boundaries in 2019.

⁸ Annual survey of hours and earnings - residents analysis, ONS 2021

Jobs below the living wage



Jobs below the living wage (2019-2021)

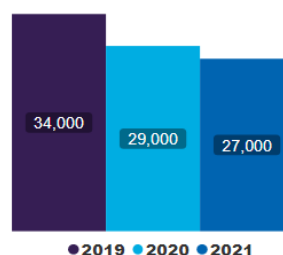
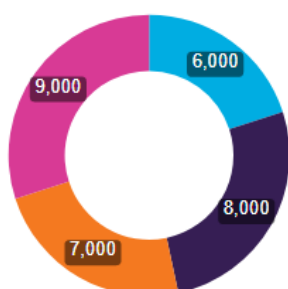


Figure 22. Annual Survey of Hours and Earnings (ASHE) – Estimates of the number and proportion of employee jobs with hourly pay below the living wage, 2021

Whilst the proportion of jobs paying below the Living Wage has declined over recent years in line with national trends, there are still 27,000 jobs in the region earning below that threshold – representing a third (32%) of the part-time jobs locally and close to a fifth of all jobs. Jobs held by women are significantly more likely to pay below the living wage (20% vs 14% of jobs held by men) and lower paid jobs are more prevalent in Christchurch and Bournemouth West.

Jobs below the living wage by area



● Bournemouth East ● Bournemouth West ● Christchurch ● Poole

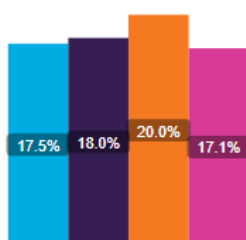


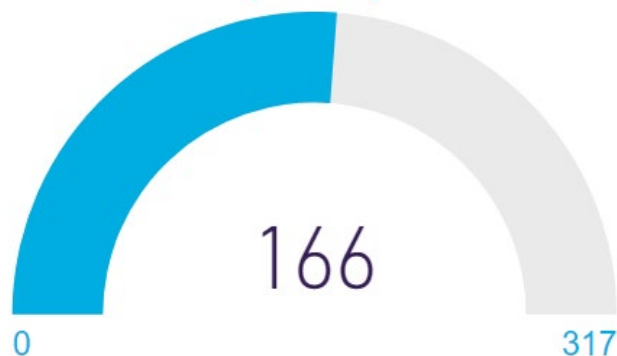
Figure 23. ASHE estimates of the number and proportion of employee jobs with hourly pay below the living wage, by parliamentary constituency. 2021

Note. Parliamentary constituencies partly extend beyond the BCP Council boundaries – see map in [Glossary](#)

Deprivation

Social mobility highlights how socioeconomic deprivation early in life affects life outcomes. Alongside larger urban areas, coastal places also tend to exhibit poor social mobility.

Index of Multiple Deprivation Rank



BCP ranks around the middle of the Index of Multiple Deprivation distribution range, and compares favourably to national picture, but the average figures mask significant disparities and pockets of deprivation.

Figure 24. BCP ranking on the Index of Multiple Deprivation 2019

In 2019⁹, 9 (4%) local neighbourhoods were among the 10% most deprived nationally and 26 neighbourhoods (11%) – more than one in every 10 – ranked in the top 20% in deprivation.

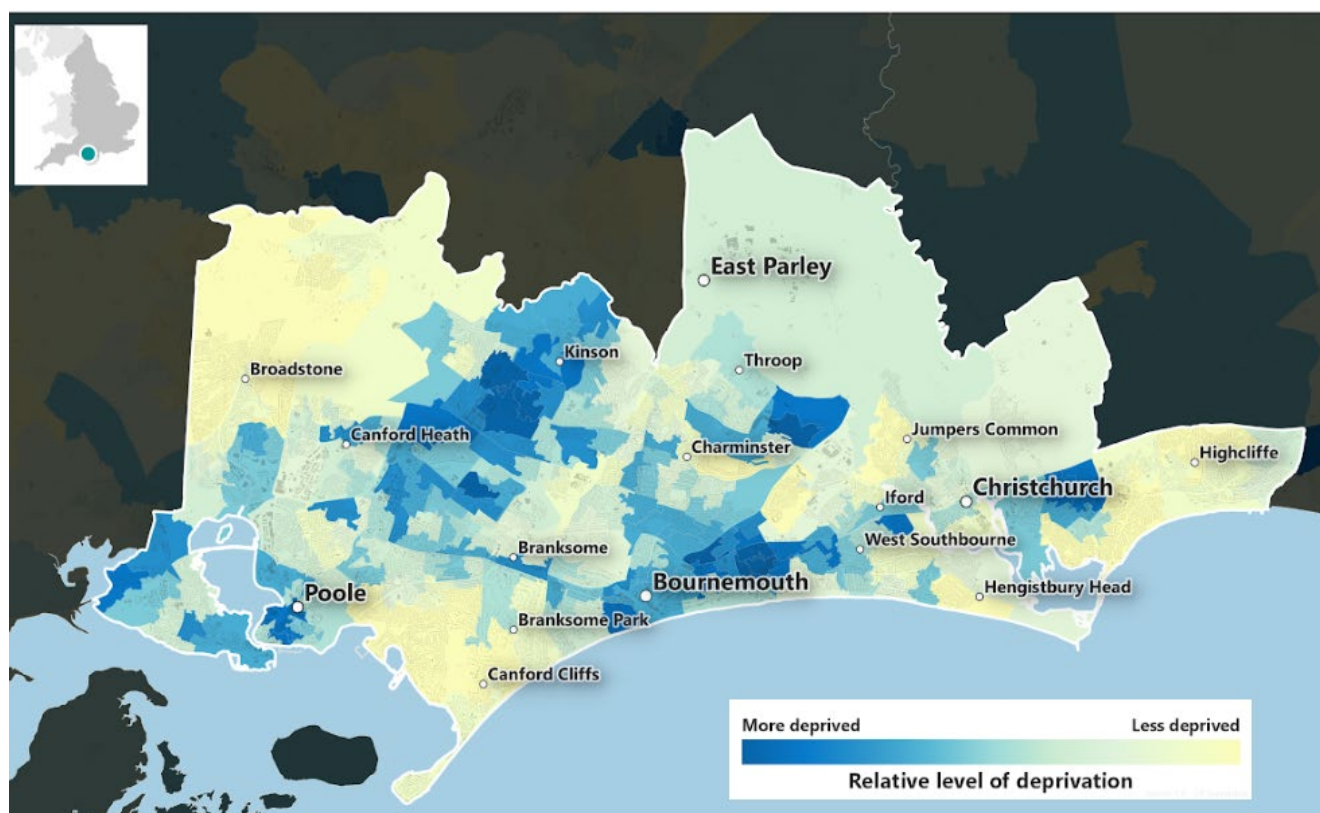
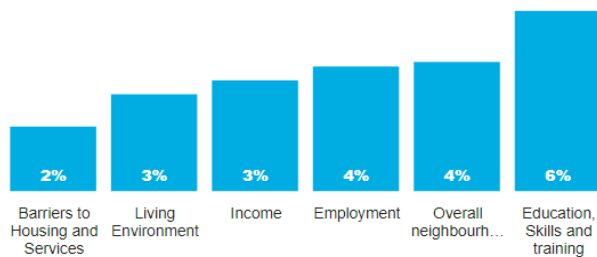


Figure 25. Index of multiple deprivation 2019. [Local Authority Maps](#)

⁹ Index of Multiple Deprivation 2019

Domains of Deprivation - % of BCP neighbourhoods among the top 10% of deprivation nationally



Number of neighbourhoods



Across the domains of deprivation, between 2 and 4 per cent of local neighbourhoods are among the most deprived nationally, and there are more areas in Bournemouth, Christchurch and Poole that fall amongst the most educationally deprived nationally (n=13, 6%).

These inequalities have profound effects on educational achievement, aspiration, and subsequent employment and life outcomes.

In Bournemouth and Poole, those from affluent families score 48 percentiles higher than those from the most deprived families in the age 16 (GCSE) test score distribution in what is among the widest gap in educational outcomes seen nationally¹⁰.

Figure 26. Proportion and number of neighbourhoods in BCP amongst the 10% most deprived nationally across domains. [Index of multiple deprivation domains, 2019](#)

In terms of income, BCP's deprivation structure aligns with the 'n'-shaped profile where more neighbourhoods have close to the average income deprivation. Yet, large wealth disparities exist with 38 BCP neighbourhoods among the 20% most income deprived nationally and representing 16% of the region. At the other end of the spectrum, 24 (17%) of the BCP neighbourhoods ranked among the 10% most affluent nationally.

While there is lower gap between the most and least deprived neighbourhoods (internal disparity) locally with income deprivation spread more evenly across neighbourhoods than nationally, still across the BCP's most affluent neighbourhood, there are only 1.3% of income deprived residents, compared to 32% within the most deprived neighbourhood, accounting for 30.4 percentage points internal disparity.

Bournemouth, Christchurch and Poole

'n'-shaped income deprivation profile

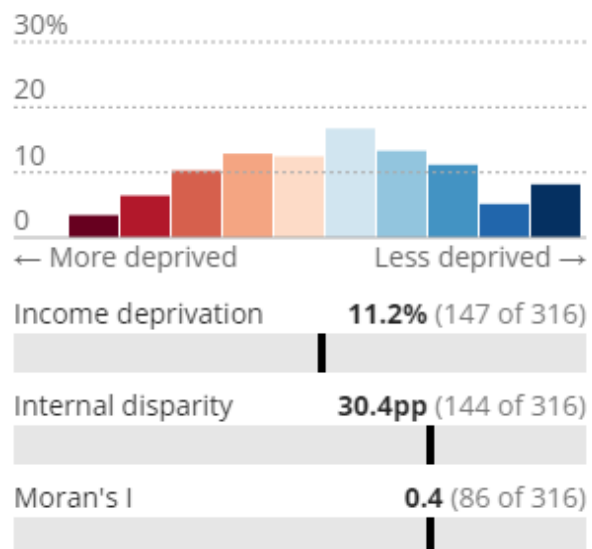


Figure 27. ONS visualisations - [Exploring local income deprivation](#)

As seen on the map below, income deprivation in the region tends to be more clustered (separated) within neighbourhoods rather than inter-mixed. Using the Moran's I spatial measure ranking areas on a scale between -1 to +1 (where -1 is completely uniform mix of high and low deprivation neighbourhoods and +1 is highly clustered), BCP ranks 0.4.

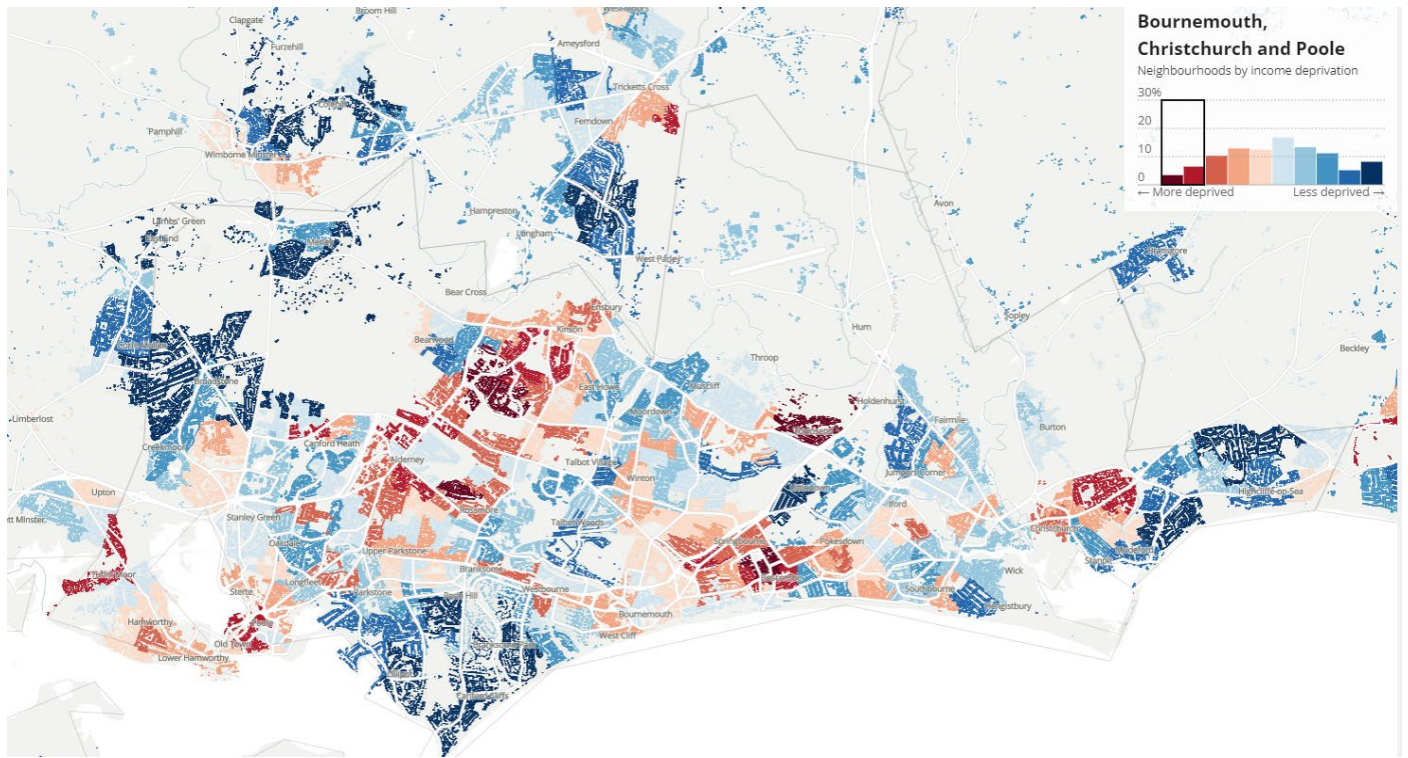


Figure 28. BCP Income Deprivation Distribution Map - ONS visualisations - [Exploring local income deprivation](#)

In its third State of the Nation report from 2021 the Social Mobility Commission examined the effects of the pandemic on efforts to improve social mobility in the UK and concluded that every critical measure of low social mobility had suffered damaging effects as a result. The coronavirus pandemic has contributed to widening the gaps between advantaged and disadvantaged, creating a lasting negative legacy on social mobility.

Children in poverty

Children (aged 0-19) living in families in Relative low income (2021)

13% | 8,779

Children living in low income families

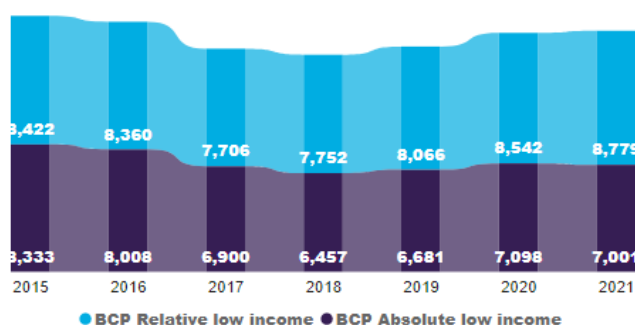


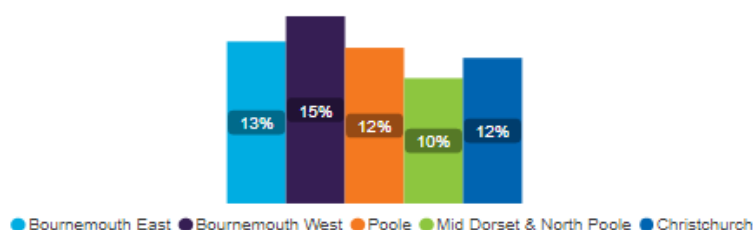
Figure 29. Children in low income families: local area statistics 2014 to 2021

In 2021 there were 8,780 children (aged 0 to 19) living in Relative low income and 7,000 in Absolute low income families across Bournemouth, Christchurch and Poole¹¹, representing 13% of BCP children for Relative (19% UK) and 10% for Absolute (15% UK).

There were 1,027 more children living in Relative low income families in 2021 than in 2018 – a 13% increase of children in poverty in the region, and over twice higher than the 6% increase seen nationally. The largest increase across local areas was recorded in Christchurch over this period, where the number of children living in relative poverty increased by a quarter (23%).

At a local area level, the proportion of children living in low income families varied, ranging from 10% to 15% for Relative low income and from 8% to 12% for Absolute low income.

% Children living in Relative low income families by area (2021)



Children living in Relative low income families by area

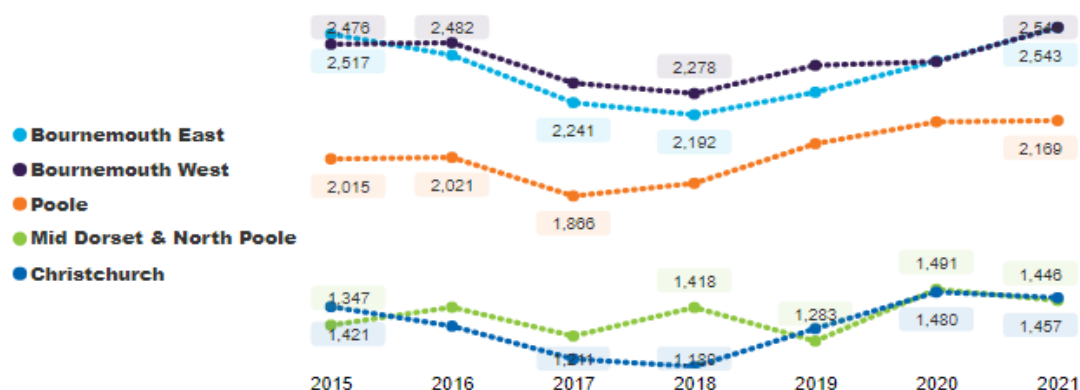


Figure 30. Children in low income families: local area statistics 2014 to 2021.

Note. Parliamentary constituencies partly extend beyond the BCP Council boundaries – see map in [Glossary](#)

¹¹ Relative low income – households with income below 60% of the median in that year; Absolute low income – households with income below 60% of (inflation-adjusted) median income in some base year, usually 2010/11.

Part 2 | Skills Demand

Online vacancies

Demonstrated by historic job vacancy figures, the local labour market is characterised by some robustness, labour demand holding up well and bouncing back relatively quickly after spells of economic uncertainty. The most jobs are advertised in Bournemouth (with 10-year average of 23k jobs per year), followed by Poole (with 15k) and Christchurch (with 3K).

The combined impact of Britain's exit from the EU, and the first waves of the Covid-19 pandemic and its related economic and social restrictions, however created prolonged economic and political uncertainty, resulting in subdued economic and labour market activity in 2019 and 2020, and feared surges in unemployment. But 2021 completely reversed that narrative. As the economy reopened, labour demand saw a unique spike and aggregate demand reached circa 44,300 vacancies in BCP - the highest on record. This accelerated demand continued in 2022 with a new high of over 18,300 vacancies posted in the first 4 months of the year. Despite confidence in the economy taking a plunge, inflation reaching a 40-year high, and energy and commodity prices spiked with the escalating conflict in Ukraine¹², the employers' hiring intentions continued to grow regardless, particularly for permanent workers, reflecting the challenges in filling vacancies¹³.

Despite lower than pre- pandemic employment levels with higher numbers of people who aren't working, many also aren't looking for a job, and the number of job candidates declined. This resulted in widely reported labour shortages as businesses are trying to fill their increased demand from a small and shrinking talent pool. Staff attraction and retention are now hot topics and a top priority for businesses, as the scarcity of supply continues, and many are struggling to operate and ensure business continuity.

The war in Ukraine and the cost-of-living crisis, however, create future uncertainty with potentially significant impact on the demand for jobs in the coming months. Economists are already predicting a recession with 0% growth in February 2022 and -0.1% in March. This is likely to have an impact as consumers and businesses look to cut non-essential spending.

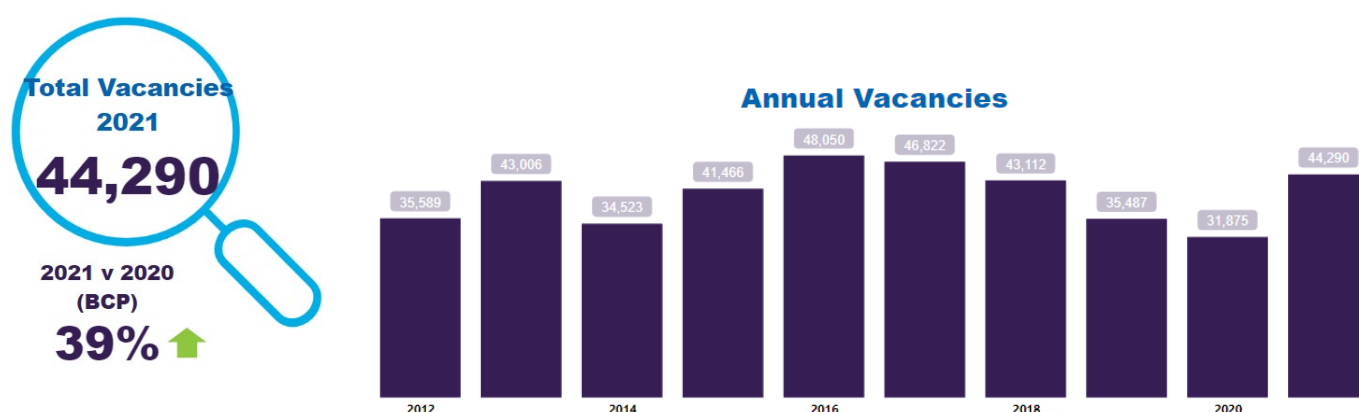


Figure 31. BCP Vacancies time series. EMSI/ Burning Glass 2022

¹² The Bank of England - Agents' summary of business conditions - 2022 Q1

¹³ The Recruitment and Employment Confederation Jobs Outlook – 2022 Q1

Top employers and jobs

The National Health Service is the largest employer by far both in the region and nationally. In 2021, NHS jobs accounted for 17% of all vacancies posted in the area with vacancies in excess of 3 times higher than the second largest employer - J.P.Morgan. Demand as also high from the local authority, educational providers, financial, hospitality, engineering and residential care firms.

The other trend is the growth in recruitment agencies activity – 2021 was the first year when several agencies appeared among the top employers reflecting the difficulties employers are facing with filling jobs.

The top jobs league table has seen some reshuffle in recent years with Covid-related surges in healthcare roles and jobs permitting remote work in 2020, while 2021 saw the return of customer service, hospitality and administrative roles among the top jobs in demand.

Employers recruiting # Jobs posted

NATIONAL HEALTH SERVICE	4,146
JPMORGAN CHASE & CO	1,104
BCP COUNCIL	1,085
BOURNEMOUTH UNIVERSITY	515
VITALITY LIMITED	215
WHITBREAD	215
BOURNEMOUTH AND POOLE COLLEGE	159
NUFFIELD HEALTH	159
RNLI	151
SHAW HEALTHCARE	145
BOURNE LEISURE	142
COLTEN CARE LIMITED	141
TRU TALENT	137
CURTISS WRIGHT	127
LV= GENERAL INSURANCE	120
SIEMENS	118
BUPA	93
MITIE LIMITED	93

Figure 32. Top hiring employers – BCP, 2021 Vacancies.
EMSI/ Burning Glass

Top jobs in demand

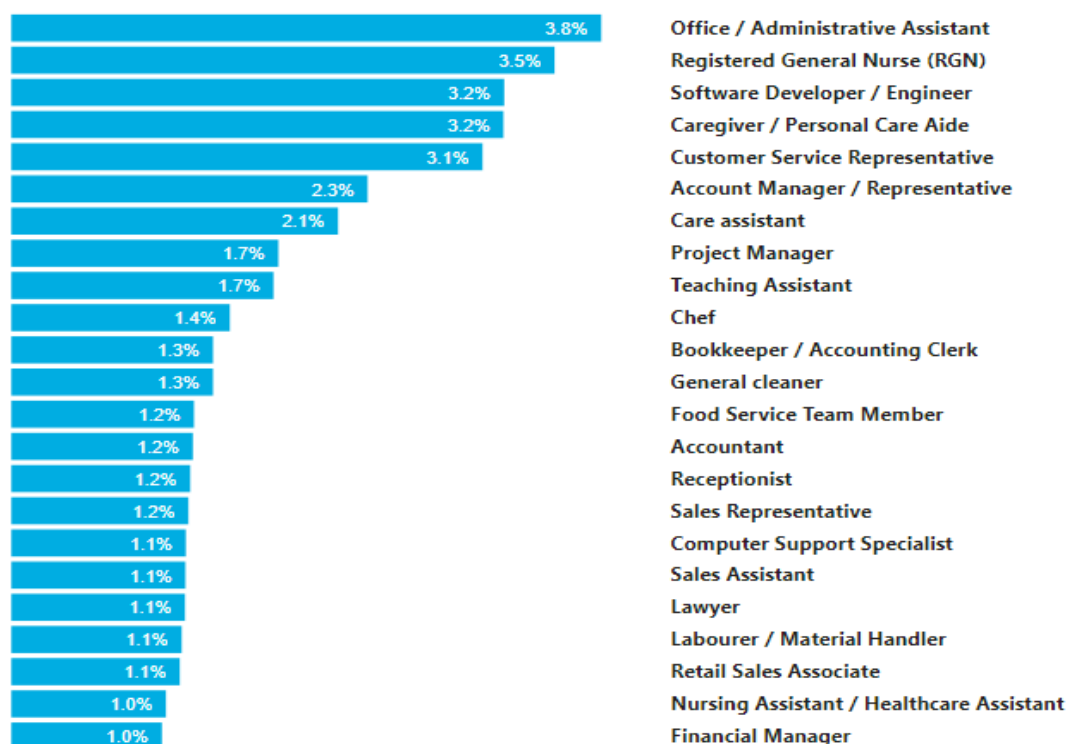


Figure 33. Top jobs in demand as a proportion of all vacancies – BCP, 2021 Vacancies.
EMSI/ Burning Glass

Demand by sector groups

The sector grouping below allows exploring the long-term broader industry trends and shifts in demand. It illustrates the expansion in the public sector demand over the years (Health, Education and Public Administration) and highlights how recruitment activity recovered remarkably in 2021 across sectors most hit from the pandemic, such as Retail, Tourism, Hospitality, Arts and Entertainment, where recruitment plummeted in 2020, and these sectors are hence experiencing the most difficulties in retaining staff displaced through furlough or attracting new in a saturated market.

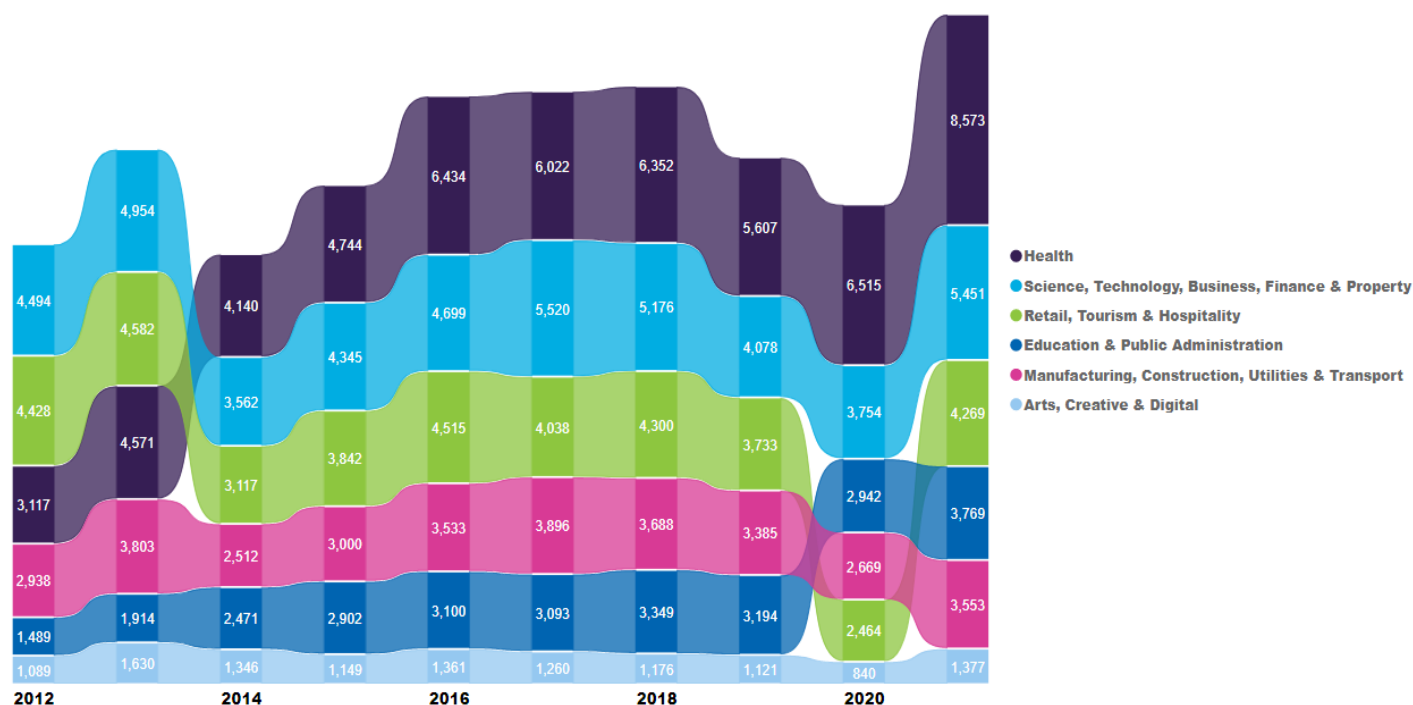


Figure 34. Vacancies by sector grouping in BCP 2012 - 2021. EMSI | Burning Glass, 2021

Sector demand

Drilling down into individual sector demand, we find that unlike the relatively stable picture of sectors employment levels, labour demand experienced considerable fluctuations over time across industries, responding more readily to economic and consumer trends and highlights possible areas of unmet employer need.

There was vacancy growth across most sectors over the past decade and all experienced growth in demand in 2021, compared to 2015, except for **Tourism and Hospitality**, which saw a net decline of 9%, but a strong rebound in 2021 when vacancies doubled on the previous year of turbulence.

Both **Hospitality and Retail** have seen some volatility in demand over the years, partly linked to traditional seasonality and turnover, as well as recently emerging disruptive trends in the economic and political conditions and consumer behaviours.

Retail demand is below the levels in employment in the sector (employs 14% of the workforce, while demand represents 8 to 10% of all vacancies), indicating saturation and the downward trend in employment seen in recent years is expected to continue.

Public sector demand in BCP has seen considerable growth across **Education, Public Administration and Defence**, but the **Healthcare** sector stands out with its remarkable journey. Advertised annual vacancies more than doubled over the past decade – a trend expected to continue in the future, reflecting BCP’s demographic profile and the pressures on the sector. While it is the largest employment sector employing 16% of the workforce, the increase in demand far exceeds the growth in employment, representing over 35% of the jobs advertised in 2021, and clearly indicating a labour supply gap within the sector.

Pandemic restrictions meant that people spent more time at home, shopping online and working remotely. This significantly increased the pressure and demand for **Transport and Utilities** (e.g., water, electricity supply, waste management etc.) and these trends are set to continue, albeit the extend of the shift is yet unclear.

Demand was growing at stable rate across **Financial Services and Professional, Scientific, and Technical**, as well as **Information and Communication Activities**, are forecast to see a moderate increase in output and employment in the future with technological progress anticipated to be major factor driving long-term growth.

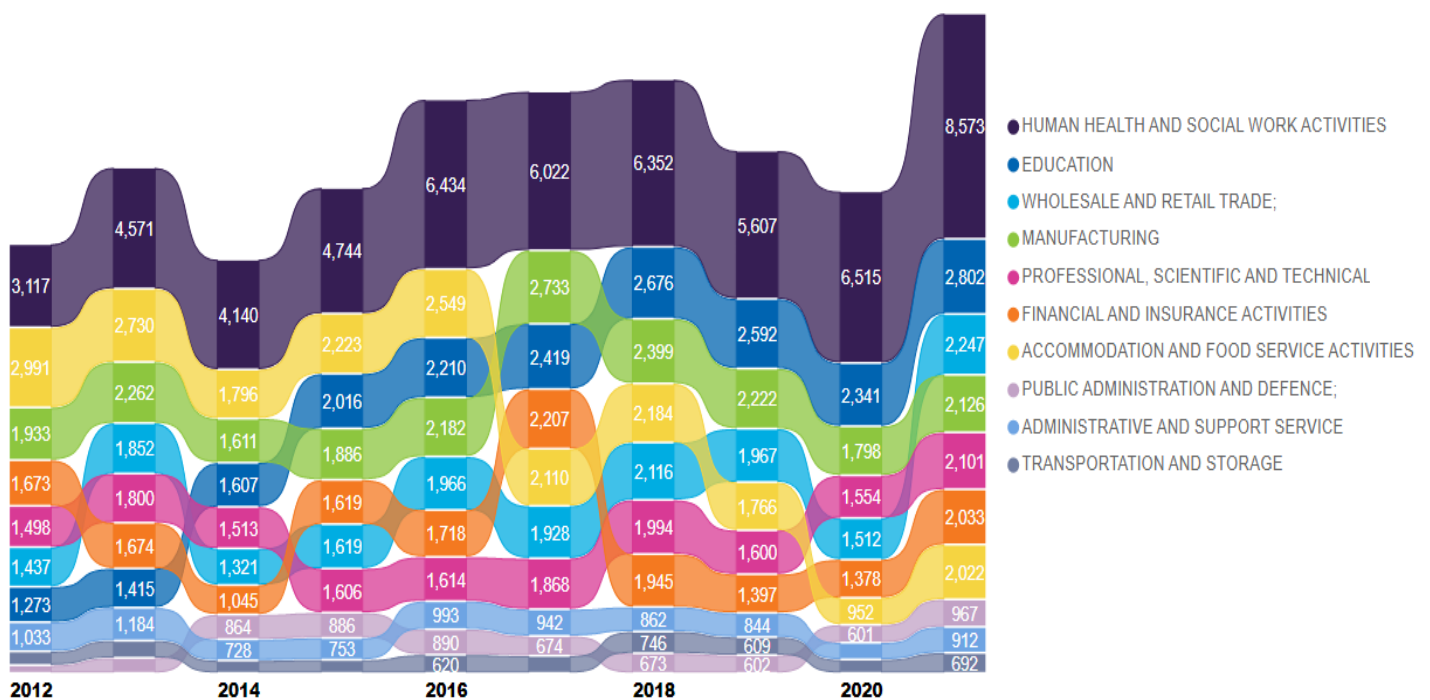


Figure 35. Vacancies by industry in BCP 2012 - 2021. EMSI | Burning Glass, 2021

Top jobs in demand across sectors (2021)

Health & Social Work

Job	# Job Postings
Registered General Nurse (RGN)	1,333
Care assistant	775
Caregiver / Personal Care Aide	658
Nursing Assistant / Healthcare Assistant	373
Office / Administrative Assistant	365
Physician	241
Healthcare Manager	203
Project Manager	166
Nurse Practitioner	141
Occupational Therapist	141
Receptionist	121
Physiotherapist	120
Psychologist	112
Family / School / General Social Worker	108
Nursing Home / Home Health Administrator	95
Registered Mental Nurse (RMN)	90
Radiology Technician	80
Nursery nurses, assistants and playworkers	76
Assistant Care Worker	63
Midwife / Nurse Midwife	59

Education

Job	# Job Postings
Teaching Assistant	553
Tutor	271
University Lecturer	196
Primary School Teacher	138
Office / Administrative Assistant	83
Secondary School Teacher	80
Nursery nurses, assistants and playworkers	63
Driving instructors	54
Researcher / Research Associate	54
Science Teacher	50
Admissions Officer	43
English / Language Arts Teacher	41
Special Education Needs (SEN) Teacher	41
Maths Teacher	36
Supply Teacher	36
Primary and Secondary School Headteacher	31
Caregiver / Personal Care Aide	27
Vocational Education Trainer / Tutor	26
Childcare / Preschool Director	25
Coach	23

Manufacturing & Engineering

Job	# Job Postings
Production Worker	79
Software Developer / Engineer	75
Mechanical Engineer	68
Office / Administrative Assistant	65
Welder / Solderer	60
CNC Operator	47
Financial Manager	47
Buyer / Purchasing Agent	43
Labourer / Material Handler	38
Industrial Engineer	37
Procurement Manager	37
Electrician	36
Validation Engineer	35
Account Manager / Representative	34
Maintenance Technician	34
Project Manager	33
Sales Representative	33
Electronic / Electrical Assembler	32
Quality Inspector / Technician	32
Carpenter	31

Retail & Vehicle Repair

Job	# Job Postings
Customer Service/ Sales Representative	258
Automotive Service Technician / Mechanic	198
Retail Store Manager / Supervisor	197
Retail Sales Associate	149
Sales Assistant	130
Delivery Driver	72
Account Manager / Representative	71
Project Manager	48
Labourer / Material Handler	38
Pharmacist	37
Food Service Team Member	34
Office / Administrative Assistant	32
Sales Manager	24
Stocking Clerk / Sales Floor Support	23
Warehouse / Inventory Associate	23
General cleaner	22
Optician	22
Pharmacy Technician	20
E - Commerce Analyst	19

Professional, Scientific & Technical

Job	# Job Postings
Lawyer	396
Paralegal / Legal Assistant	78
Office / Administrative Assistant	65
Account Manager / Representative	53
Security Officer	47
Chef	44
Legal Secretary	40
Project Manager	32
Veterinarian	32
Software Developer / Engineer	26
Tax/ Financial Manager	25
Marketing Manager	23
Sales Manager	22
Bookkeeper / Accounting Clerk	21
Accountant	19
Graphic Designer / Desktop Publisher	19
Licensed Conveyancer	16
Data / Data Mining Analyst	15
Payroll Specialist	15
Mechanical Engineer	13

Finance & Insurance

Job	# Job Postings
Software Developer / Engineer	180
Data / Data Mining Analyst	102
Customer Service Representative	93
Business / Management Analyst	79
Office / Administrative Assistant	79
Insurance Sales Agent	73
Chief Executive Officer	71
Project Manager	61
Financial Manager	43
Operations Manager	40
Sales Representative	39
Operations Analyst	38
Marketing Manager	37
Account Manager / Representative	34
Financial Analyst	30
Software QA Engineer / Tester	26
Personal Financial Advisors	24
Bookkeeper / Accounting Clerk	19
Actuary	18
Business Intelligence Analyst	18

 Tourism & Hospitality		 Public Administration & Defence		 Transport	
Job	# Job Postings	Job	# Job Postings	Job	# Job Postings
Chef	300	Office / Administrative Assistant	50	HGV / LGV Class 2 Driver	72
Food Service Team Member	270	Executive Assistant	27	Forklift / Pallet Jack Operator	69
Waiter / Waitress	120	Customer Service Representative	26	Delivery Driver	44
Receptionist	110	Project Manager	20	HGV / LGV Class 1 Driver	39
Bartender	107	Administration Manager	17	Account Manager / Representative	25
Kitchen Staff	93	Production Worker	11	Office / Administrative Assistant	24
Maid / Housekeeping Staff	91	Security Officer	11	Coach	19
Restaurant / Food Service Supervisor	67	General cleaner	10	Labourer / Material Handler	19
General cleaner	52	Occupational Therapist	10	Van / Taxi / Shuttle Driver	13
Barista	44	Prison Officer	10	Warehouse / Inventory Associate	13
Restaurant / Food Service Manager	36	Tutor	10	Financial Manager	12
Hotel Manager	27	Health Technician / Technologist (Other)	9	Project Manager	12
Bell Person / Baggage Attendant	24	Contract Administrator / Manager	8	Software Developer / Engineer	12
Cook	24	Financial Manager	8	Cargo / Freight Coordinator	11
Project Manager	24	Lawyer	8	Customer Service Representative	11
General Manager	22	Asset Protection / Security Manager	7	Property / Real Estate / Community Managers	10
Senior Administrator	19				
Head Waiter/Waitress	18				
Customer Service Representative	17				
Maintenance Technician	17				

Working futures 2020 sector employment levels projections, adjusted with recent local developments and projected to:





grow / maintain / decline

Sector growth forecasts

Working Futures study 2017-27 projections are the authoritative source for long-term structural labour market trends; however, data is only available at county (Dorset LEP) level. The latest findings published in 2020 estimated industries to largely maintain their employment levels over the coming years and where decline is expected, it was marginal over a 10-year period and submerged by replacement demand. The highest growth was expected in healthcare and business and support services with projected expansion of c.7,000 and c. 6000 jobs respectively. Business and support services growth was largely accounted for by Professional Services, Business Support, IT, Construction and Arts and Entertainment (see [Dorset Local Skills Report - Annex](#) p.71 for breakdowns by industry).

Working Futures also predicted a modest growth in Construction and Retail, Tourism and Hospitality. In view of recent developments and BCP's ambitious housing development plans, however we can expect a substantial growth in building and construction over the coming years with uplift in housing and regeneration projects, as well as energy efficiency and retrofitting requirements of Net Zero transitioning – all expected to exponentially boost the demand in the sector.

As for Retail, Tourism and Hospitality, these sectors were subjected to major shifts over the past two years and conditions are still volatile. Retail has seen declining employment levels and this trend is set to continue. Hospitality experienced record spikes in demand, and more recent projections below illustrate some expansion in the Food and Beverage sectors, but with escalating staff shortages, forecasts are inherently uncertain.

Despite modest employment growth projections for Engineering and Manufacturing, mainly accounting for automation potential, there are exciting economic opportunities within these sectors in BCP going forward. There are growth areas identified in advanced engineering, marine, aerospace, defence, and cyber security, so the demand for new skills and fresh talent taking on emerging job opportunities is on the rise.

These findings were largely confirmed in a more recent study projecting circa **14,800 new jobs to be created in BCP between 2020 and 2030**, and growth / decline expected as shown in the table below.

	Sectors with highest forecast employment growth	2020-2030 changes	Sectors with highest forecast employment decline	2020-2030 changes
1)	Business services	+3,590	Real estate	-720
2)	Health	+3,380	Metals & metal products	-340
3)	Construction	+2,470	Other manufacturing & repair	-300
4)	Food & Beverage	+1,630	Retail trade	-290
5)	Residential & Social services	+1,500	Machinery	-230

Table 2. BCP sectors with highest and lowest forecast growth, **Cambridge Econometrics (2020)**

Within all sectors in BCP, however new job growth pales in comparison with the projected replacement demand which will have a substantial impact on most occupations and industries.

Demand by occupations

Closely reflecting the occupational structure of employed workers, high skilled occupations accounted for 52% of the demand in BCP, mid-range skilled for 28% of and lower-skilled for 20% of the 2021 vacancies.

As indicated by growing levels of employment, the high skilled labour market for college and university graduates is thriving with a particularly strong demand for professionals, which marks a 38% increase in 2021 on 2012 – a trend expected to continue in the future. While it is the largest occupation group in employment engaging 19% of the workforce, the increase in demand far exceeds the growth in employment, representing 27% of the jobs advertised in 2021, and indicating a labour supply gap across professions. Demand is exceeding supply for nurses, software developers, accountants, business and data analysts, teachers, solicitors etc.

The highest increase in demand over the past decade however was for caring roles (70%↑). As highlighted earlier, employment figures have grown, but not at the rate suggested by the accelerated demand, which is clearly outweighing the supply in the sector.

Conversely, the largest decline in demand over the past decade was noted in sales occupations, which have already seen a decline in employment and the number of jobs available per annum fell by 16% over the past decade.

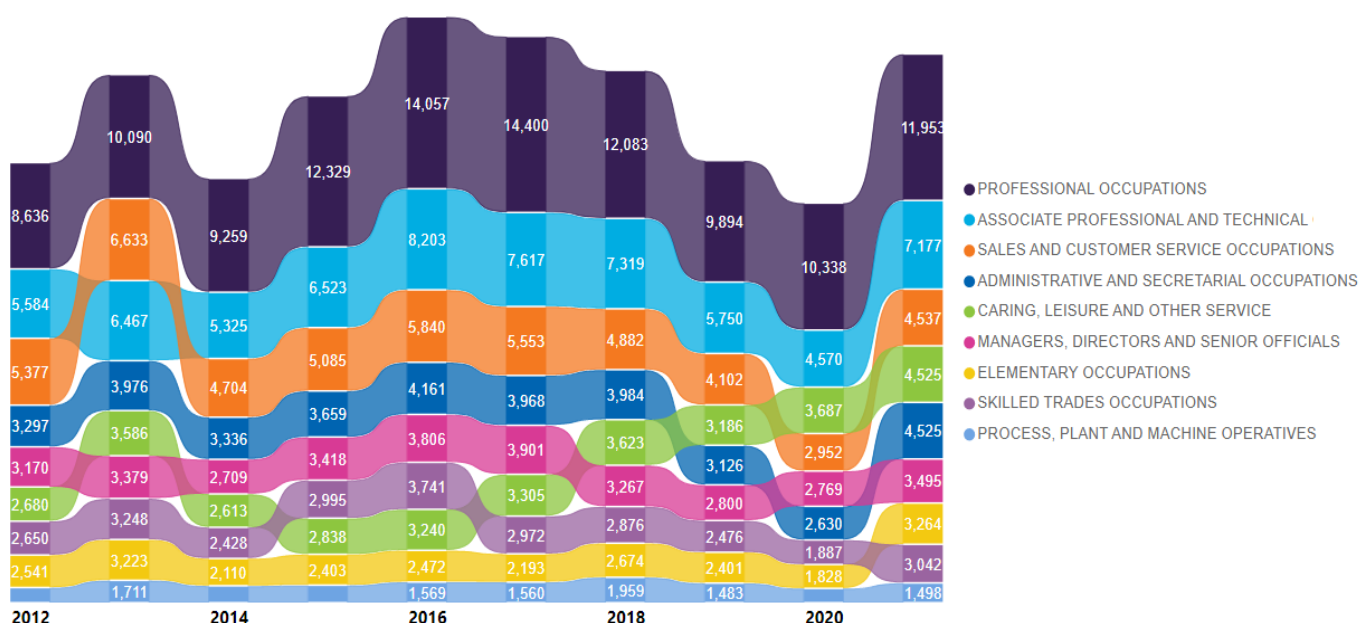


Figure 36. Vacancies by occupation in BCP 2012 - 2021. EMSI | Burning Glass, 2021

Top jobs in demand across occupations (2021)

Jobs generally requiring graduate level qualifications

Professional		Associate professional & technical		Managers, directors & senior officials	
Top Jobs	# Vacancies	Top Jobs	# Vacancies	Top Jobs	# Vacancies
Nurses	1,933	Human resources and industrial relations officers	597	Managers and proprietors in other services n.e.c.	695
Programmers and software development professionals	1,524	Marketing associate professionals	559	Marketing and sales directors	583
Chartered and certified accountants	612	IT user support technicians	552	Financial managers and directors	411
Management consultants and business analysts	490	Engineering technicians	411	Health services and public health managers and directors	228
IT business analysts, architects and systems designers	484	IT operations technicians	399	Property, housing and estate managers	199
Solicitors	453	Science, engineering and production technicians n.e.c.	351	Production managers and directors in manufacturing	151
Teaching and other educational professionals n.e.c.	452	Finance and investment analysts and advisers	327	Managers and directors in retail and wholesale	149
Web design and development professionals	426	Buyers and procurement officers	283	Purchasing managers and directors	139
Medical practitioners	310	Business sales executives	273	Residential, day and domiciliary care managers and proprietors	117
Business and financial project management professionals	302	Health associate professionals n.e.c.	223	Chief executives and senior officials	114

Jobs generally requiring Level 3-5 qualifications

Administrative & secretarial		Skilled trades		Caring, leisure & other services	
Top Jobs	# Vacancies	Top Jobs	# Vacancies	Top Jobs	# Vacancies
Other administrative occupations n.e.c.	1,363	Chefs	587	Care workers and home carers	2,199
Book-keepers, payroll managers and wages clerks	653	Vehicle technicians, mechanics and electricians	271	Teaching assistants	598
Receptionists	481	Electricians and electrical fitters	232	Nursing auxiliaries and assistants	567
Office managers	233	Plumbers and heating and ventilating engineers	218	Nursery nurses and assistants	184
Company secretaries	220	Carpenters and joiners	215	Housekeepers and related occupations	163
Financial administrative occupations n.e.c.	201	Metal machining setters and setter-operators	131	Caretakers	126
Personal assistants and other secretaries	172	Electrical and electronic trades n.e.c.	126	Sports and leisure assistants	115
Transport and distribution clerks and assistants	159	Catering and bar managers	118	Senior care workers	106
Records clerks and assistants	147	Metal working production and maintenance fitters	114	Educational support assistants	101
Stock control clerks and assistants	138	Painters and decorators	110	Childminders and related occupations	61

Jobs generally requiring qualifications below Level 3

 Sales & customer service		 Process, plant & machine operatives		 Elementary	
Top Jobs	# Vacancies	Top Jobs	# Vacancies	Top Jobs	# Vacancies
Sales related occupations n.e.c.	1,859	Van drivers	408	Kitchen and catering assistants	810
Customer service occupations n.e.c.	1,302	Metal working machine operatives	172	Cleaners and domestics	526
Sales and retail assistants	527	Large goods vehicle drivers	168	Elementary storage occupations	435
Sales Supervisors	286	Plant and machine operatives n.e.c.	104	Elementary administration occupations n.e.c.	252
Customer service managers and supervisors	196	Fork-lift truck drivers	83	Elementary construction occupations	230
Telephone salespersons	83	Assemblers (vehicles and metal goods)	74	Security guards and related occupations	228
Merchandisers and window dressers	57	Driving instructors	67	Waiters and waitresses	193
Telephonists	56	Assemblers (electrical and electronic products)	62	Bar staff	125
Call and contact centre occupations	37	Construction operatives n.e.c.	55	Other elementary services occupations n.e.c.	103
Vehicle and parts salespersons and advisers	37	Other drivers and transport operatives n.e.c.	45	Packers, bottlers, canners and fillers	75

Working futures 2020 occupation employment projections, adjusted with recent local developments, and projected to:

  
 grow / maintain / decline

Occupation growth forecasts

Working Futures (pre-pandemic) forecasts¹⁴ illustrate minimal change in the occupational makeup across industries in the near term, but projected employment growth is mainly concentrated in professional and caring occupations. These trends applied to BCP's occupation structure over the previous years, where shifts in favour of high skilled occupations (see Table 1), particularly professional, and a surge in employment in caring jobs were already seen, and are set to continue in the future.

In contrast, declines are projected across most mid-and-low-skilled roles, although this is not going to be uniform. Roles such as administrative & secretarial, skilled trades and process, plant and machine operatives are set to see some decline in part to reflect greater automation and machine learning applied to augment some of these roles and create new higher or lower skilled roles in their place, where, particularly for elementary roles, demand and employment will grow.

Consequently, forecasting models show a continued shift to high-level qualifications within the workforce, with 80% of newly created jobs projected to require qualifications of Level 5+ and the proportion of those with Level 1 or no formal qualifications set to reduce from 1-in-8 to less than 1-in-10.

As already highlighted with sector projections, it must be noted again that expected new job growth in BCP is a fraction of the projected replacement demand which will remain a major recruitment driver across most occupations.

Detailed replacement demand projections by occupation are available at Dorset LEP level (see Dorset Local Skills Report - Annex p74 for breakdowns), with highest replacement is expected in:

- Caring personal service occupations
- Corporate managers and directors
- Elementary administration and service occupations
- Administrative occupations
- Business and public service associate professionals

¹⁴ Working Futures 2020 detailed occupational projections are only available at county (Dorset LEP) level - see [Dorset Local Skills Report - Annex](#) pp 72-74 for breakdowns

Demand by qualification and experience

Experience requirements

Over half (56%) of the jobs advertised in Bournemouth, Christchurch, and Poole in 2021 required less than 2 years of experience, more than a third (37%) requested mid-career experience of 3 to 5 years, while under 7% required senior employees with 6 and more years of experience.

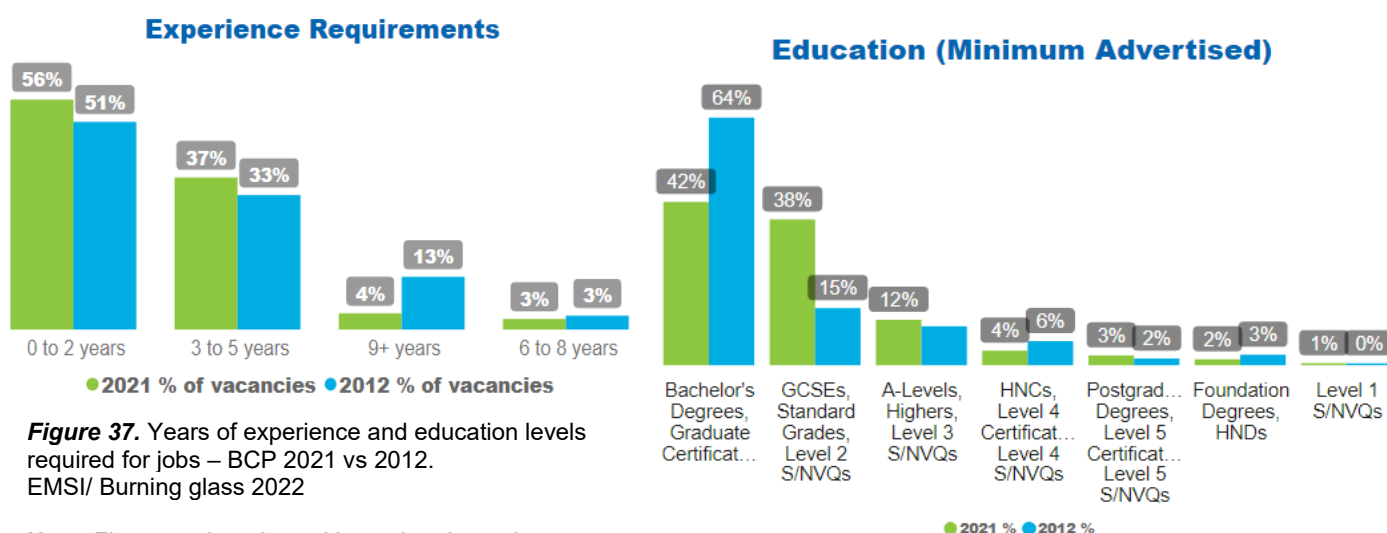


Figure 37. Years of experience and education levels required for jobs – BCP 2021 vs 2012. EMSI/ Burning glass 2022

Note. Figures to be taken with caution due to large number of missing data points.

Educational requirements

In terms of educational requirements, half of the jobs advertised in 2021 required GCSE's and A Levels as a minimum and close to a half (47%) required degrees.

The trend over recent years has been towards diminishing proportions of jobs requiring extensive experience and degrees. Most notably only 4% of the jobs in 2021 required over 9 years of experience in contrast to 16% a decade earlier. Similarly, the jobs specifically requiring bachelor's degrees declined by 22 percentage points over the past decade.

These trends support the anecdotal reports that employers are becoming more likely to consider experience and formal degrees as secondary to learning potential and cultural fit which weigh heavier in the recruitment process over recent years.

It could be argued that this further indicates difficulties in hiring experienced professionals in particular specialist areas, making employers more willing to invest in training and development. This could also suggest the changing nature of jobs with technological advancements, newly emerging roles and fast-moving industry needs could be making the years of experience less relevant in certain fields, as well as diminishing the shelf life of academic courses. These findings clearly suggest that focus on work-readiness, short courses in emerging technology and professional areas, and accelerated soft skills development are becoming ever more essential.

Where subject areas were specified in job postings, the largest demand in the region was for Engineering, Nursing and Business studies, but also English and Maths, Accounting, Computer Science and Teaching qualifications among others.

Subject Areas in Greatest Demand

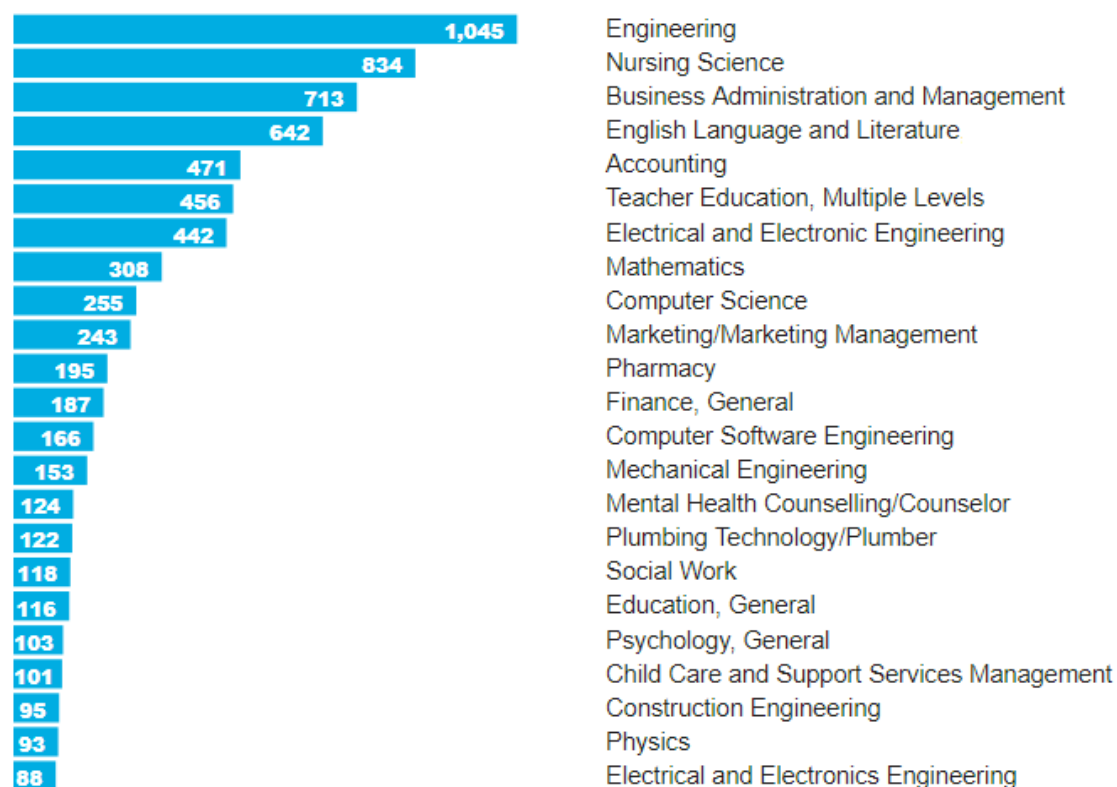


Figure 38. Subject areas in highest demand – BCP 2021. EMSI/ Burning glass 2022

Note. Figures to be taken with caution due to large number of missing data points.

Demand by skills

Employers most frequently requested soft skills were baseline skills for communication, organisation, attention to detail, planning and creativity. Many employers also specified particular digital skills as part of their job postings.

Despite the common perception that quickly emerging digital developments mean the risk of these skills to become obsolete is higher when compared to soft skills or other areas of knowledge, there are certain skills that are now deemed essential for employers and projections suggest this demand is stable or growing.

Such skills include all Microsoft Office applications, which consistently top the lead table, but software development and programming languages are also growing in demand with projections showing stable growth for most languages, and Python demand is growing.

Many businesses now also require customer and operation management platforms skills, such as CRM, ERP and SAP, team and project management tools, such as Scrum, as well as familiarity with social media platforms.



Figure 39. Baseline and digital skills in highest demand – BCP 2021. EMSI/ Burning glass 2022
Note. Figures to be taken with caution due to large number of missing data points.

Proficiency of workforce

With widely reported labour shortages, the issues around optimal utilisation of the existing workforce skills is increasing in relevance.

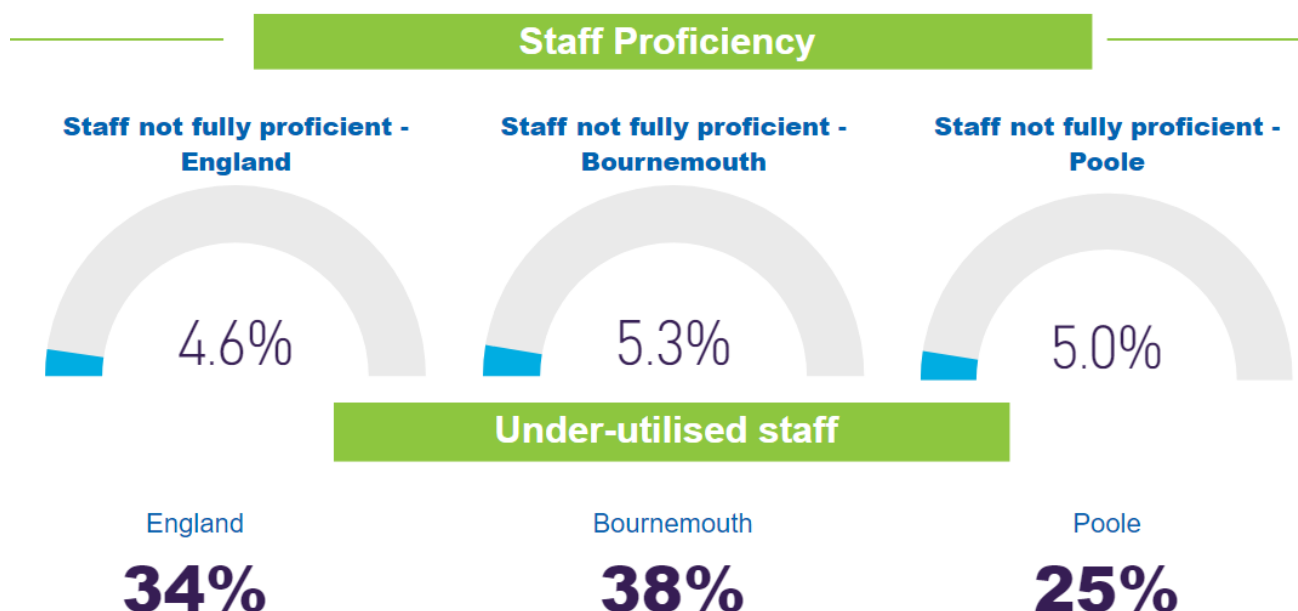


Figure 40. Staff that are not fully proficient and under-utilised. Employer Skills Survey, 2019 (published 2020)

According to the latest Employer Skills Survey results (pre-pandemic, published 2020), there was slightly higher proportions of staff not fully proficient for their jobs in Bournemouth and Poole than nationally and a third of these (32%) were under-utilised in the workplace, with proportions significantly higher in Bournemouth (38%) than in Poole (25%).

This may suggest that the 'matching process' between people with the requisite skills to the jobs/roles that require those skills may not be working as well as it could be. Better training and utilisation of skills by employers would act as a key driver for performance and better organisational management is a major influence on efficient skills utilisation.

Hard-to-fill and skills shortage vacancies

Hard-to-fill vacancies and skill shortages are linked to adverse effects on business performance and growth and are significant areas of concern for the business community. Survey data sheds light on the extent to which local employers are experiencing staffing challenges. It must be noted that this data was collected pre-pandemic and some of these recruitment challenges have exacerbated since across the employer base.

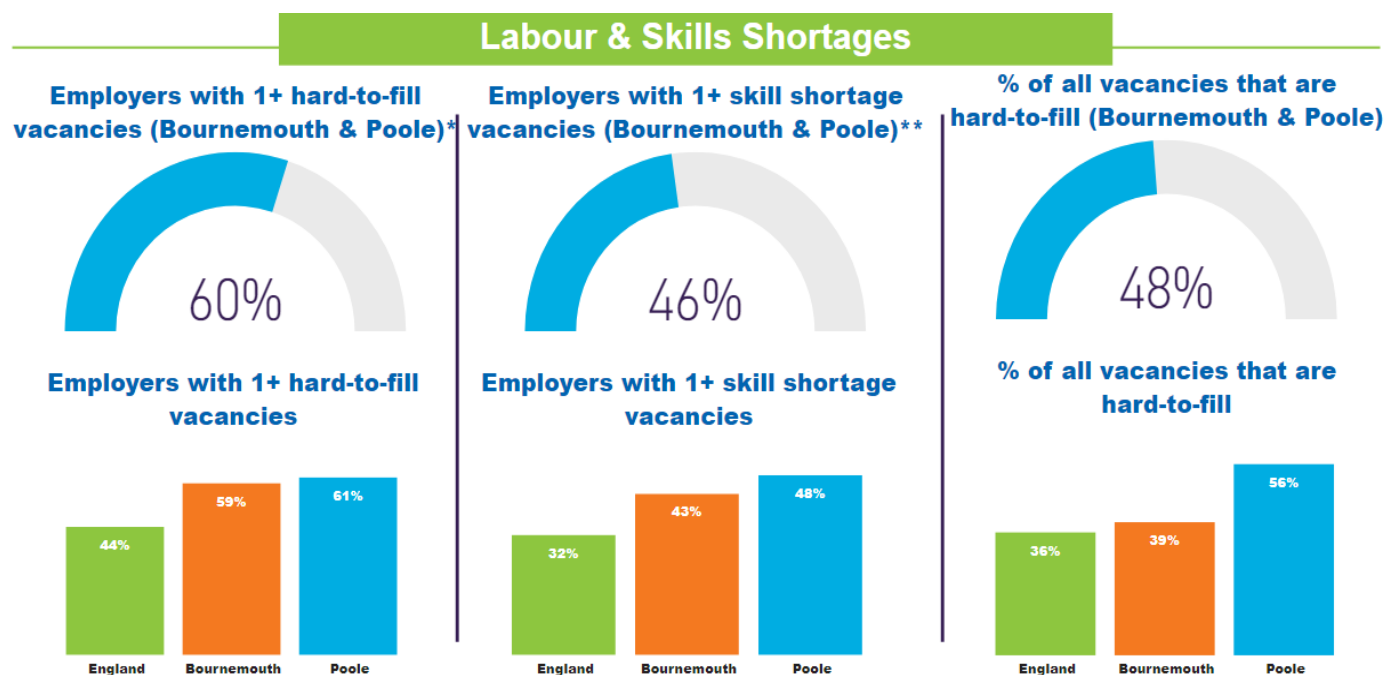


Figure 41. Proportion of vacancies that are hard-to-fill or skills-shortage. Employer Skills Survey, 2019 (published 2020)

BCP scores relatively high on a range of indicators that illustrate an overall unmet demand for labour, suggesting the local labour market is experiencing 'tighter' conditions.

- 60% of Bournemouth and Poole employers with vacancies, at least one of which is hard to fill (national average 44%),
- 46% of all employers with vacancies (average across Bournemouth and Poole) had at least one hard-to-fill vacancy specifically caused by skills shortages ('Skills Shortage Vacancies') with a national average 32%, and
- Half (48%) of all vacancies were hard-to-fill, compared to a third (36%) nationally

Skills gaps

The Dorset Employer Skills Survey 2020 further explored the types of skills gaps that are most prevalent among local employers.

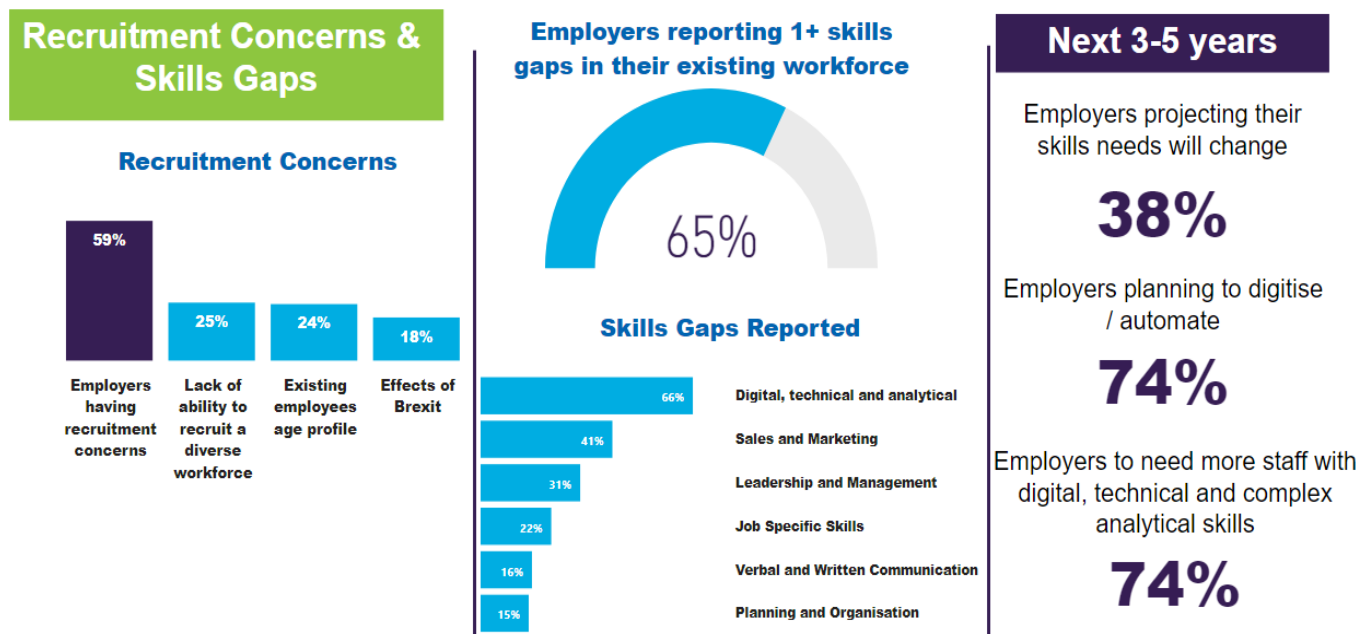


Figure 42. Dorset Employer Skills Survey 2020 – BCP employers results

- Close to 60% of employers had recruitment concerns, linked to lack of diverse workforce, employee age profile or Brexit related
- Two-thirds of employers reported at least one skills gap within their workforce
- The skills gaps most commonly experienced were in digital, sales and marketing, complex analytical, leadership and management skills
- Among the jobs that were hard to fill, local employers mentioned health and social care (nurses, carers, physiotherapists), engineers (systems, technical), construction (plumbing, electrical, carpentry), professional, finance and legal (business, account managers, accountancy, tax advice, financial management and planning, legal skills, fundraising), hospitality (chefs, waiting, front of house staff).
- The biggest difficulty in filling vacancies was accessing sufficient numbers of applicants with the required skills, motivation and personal attributes.

The significance of these skills gaps was highlighted by c70% of BCP employers stating that skills gaps were impacting their productivity, while over a half felt they were having negative effects on business profitability and growth.

While these surveys were undertaken pre-pandemic, with accelerated labour shortages reports by local employers over the past year, there are strong indications that these labour supply issues have deepened, particularly through simultaneous recruitment drives reactive to changes in pandemic restrictions and Brexit effects on workforce availability especially for 'lower skilled' occupations.

Skills supply and demand mismatches

Another indicator of the mismatch between the demand and supply of skills is the discrepancy between the frequency a skill appears in job postings, in contrast to the frequency it appears in personal profiles.

This data indicates that demand for specialist skills in Care, Nursing, Finance, Accounting, Audit, Teaching, Agile Methodology and JavaScript programming skills clearly outweigh the local availability of these skills.

Similarly, common skills with greatest gap in supply include Communication, Attention to Detail, Customer Service, Enthusiasm, Problem Solving, Self-Motivation and Resilience.



Figure 43. Specialist and common skills – frequency in postings vs frequency in profiles – BCP 2020-2022. EMSI/ Burning glass 2022

Part 3 | Skills Supply

Educational providers

Bournemouth and Poole College - the largest provider of further education, apprenticeships and vocational training in the area catering for around 11,000 students per year and collaborating with over 2,000 businesses to deliver one of the largest and most successful apprenticeship programmes in the country.

- The College offers a wide range of vocational courses at every level from entry level skills to higher technical qualifications, delivered across three campuses covering the BCP area.
- Evolving collaborations with local businesses, employers, and employer representative organisations through regular Employer Advisory Boards (EAB) across key areas such as Construction, Engineering and Digital. The College also works closely with the Dorset Chamber to enhance employer engagement through a range of skills engagement activities and partners with local sector forums including the Dorset Construction Training Forum, Dorset Engineering and Manufacturing Cluster, Bournemouth Area Hospitality Association and Silicon South. The active contribution of the various employer groups has resulted in many successful initiatives, such as a professionalism week, guest talks, a day a week work experiences, festivals, employer curriculum input and immersive client briefs.
- Apprenticeship programme business collaborators the include Sunseeker, NHS, Superior Seals, McCarthy Stone, Cobham, RNLI, Volvo Penta, Berthon Boats, Atlas Electronic, BCP, Unique Group, A&G Brick, Intergage.
- Offers a wraparound service for employers, encompassing business development, delivery and careers and employability teams, ensuring consistent communication and the ability to respond to what is often a wide range of employer needs. It operates a clear route into the curriculum, primarily via its BASE team who support employers and signpost them to the relevant offers, whether this be apprenticeships, work experience or student support. The team supports employers to recruit a wide range of apprentices and offer a range of events facilitating contact with students, such as the recent Festival of Employability. Employers also input into the Careers Maps, allowing students to explore routes into future careers and qualifications available.
- The College also works actively with local schools to support young people in accessing the full range of opportunities available in the region.
- The College has a focus on engineering and construction, business, digital, healthcare and education courses in line with BCP's identified exemplar sectors and is also an established HE provider – c.600 students studying towards degree level qualifications.

- Throughout 2021 BPC also partnered with universities and employers to deliver degree apprenticeships, responding to local specialist skills needs in engineering and nursing associate specialisms and introduced courses in Healthcare, Construction, and a Certificate in Understanding Climate Change.
- An Aircraft Maintenance apprenticeship programme was developed with employers from the local aviation sector based at Bournemouth Airport and an Esports BTEC course was created with a local community crossing over multiple growth sectors including digital, sports, enterprise, and creative and offering an exciting local career.
- In 2021/22 over a quarter (26%) of the 16-19 learners were eligible for free school meals and 16% came from the 20% most deprived communities nationally.
- Bournemouth and Poole College was selected for a skills bootcamp provider, won a competitive collaborative bid to enhance digital skills and 5G adoption in Dorset, and is preparing to offer its first T Levels from 2023.
- The College's Career Ready Hubs launched recently have created a significant impact, offering a wide range of support, allowing students to book tailored guidance sessions either in-person or remotely, meet employers and guest speakers, participate in workshops and other activities on their career journey resulting in the College to achieve all eight Gatsby benchmarks – a significant milestone and a national benchmark to demonstrate the careers services provided are of a high standard, reflecting strong commitment to helping students make informed decisions about their futures and improving life outcomes.

Skills & Learning - Adult Community Education – Dorset and BCP Council's joint adult education provider.

- Since 2013, Skills & Learning have worked with over 33,500 learners.
- Supporting adults across the county to gain confidence, skills and qualifications.
- Almost half of their 3,110 learners were from areas of deprivation and over a half of them were unemployed
- 72% positive destination rate for 20/21
- Provision from 30 centres across Dorset and 20+ subject areas.
- A significant apprenticeship provider -achieved [Dorset Apprentice of the Year](#)

AECC University College – a specialist institution offering world-renowned courses in health sciences,

- Innovative organisation, leaders in health service education, attracting large number of international students to the area (38% of its undergraduate students are non-UK domiciled, and come from 56 countries across the globe).
- Place based onsite clinical training in one of Europe's largest placement clinics offering patient care from treatment to rehabilitation.
- AECC delivers work-ready health professionals in chiropractic, psychology, sport, exercise and health-science and medical-imaging including ultrasound and radiology and is developing provision in population health, rehabilitation, prevention and human potential, focusing on areas of unmet demand in learning disability, speech and language therapies, occupational therapy, and business management in healthcare.
- The number of local schools supported through the AECC Access and Participation programme is increasing year on year and the number of students has tripled reaching 425 thus far in 2021-22 and the university is working closely with DWP to facilitate reablement through its different rehabilitation programmes and facilities.
- AECC is working closely on local skills projects including the Boscombe Towns Fund Digital Hub, the King's Park community wellbeing hub, and collaborating with innovative local employers such as MyHealth in testing assistive technology solutions, while also delivering Future Pathways - virtual careers events including local employers, employability lectures, support with CV writing and signposting to local graduate opportunities.

Arts University Bournemouth – a leading specialist arts, design, media and performance institution with circa 4000 students, over 1,000 graduates over the past year and a clear commitment to its civic university agenda.

- Recognised for preparing graduates for direct career entry in the creative industries, AUB is delivering a range of projects that embed industry experience within the curriculum. One such initiative is The Achieve Project - a collaboration between Superpeople, Disability Rights UK and AUB Graphic Design students, whereby through mutual aid and knowledge exchange, disabled people and people with learning difficulties or mental health conditions are helped into employment, while students use their creative skills to design a personal brand identity and self-promotion products to help participants build confidence and find ways to introduce themselves to potential employers to gain work experience, an apprenticeship or employment.
- As part of their Access & Participation work Arts University Bournemouth funded upskilling short courses for young people experiencing disadvantage. AUB funds Saturday Art School places to support young people's success in Further/ Higher Education and collaborates with Lush to offer live briefs to under-represented groups of students and support employability with associated internships.

- The university has also recently launched its innovative Wonder What resource that helps people identify suitable careers in the creative industries and highlight latest developments and future prospects - <https://www.wonderwhat.co.uk/>
- AUB works across teams to engage with local and national employers and has a careers hub to advertise local, national and international job opportunities and creative networking events and link talent with opportunities. AUB's innovative careers and skills initiatives engaged 4,565 students in 2020/21 - many organised with local collaborators. The Creative Futures Fest saw 27 industry speakers and 736 students in attendance. Designers and illustrators from AUB joined BU students and local employers at Dorset Spark- collaborative event led by BCP Council and Dorset Growth Hub. BCP Council also brings together local universities and creative tech companies to brainstorm ways of retaining talent locally including a mentoring scheme aimed at promoting graduate retention.
- Arts University Bournemouth has an embedded culture of entrepreneurialism and having attracted funding to support research and innovation projects with local industry, has invested in latest technology, equipment and facilities, and recently launched its Innovation Studio - a £4 million creative facility housing state-of-the-art equipment, from Virtual Reality and visualisation to additive manufacturing, digital textiles and 3D printing offering a unique opportunity for local companies to develop and test new products and services.
- AUB's Associate Partner programme enables business access to the Innovation Studio and one of the large local maritime employers Sunseeker are the first organisation to join the six-month initiative and use AUB's 3D print and prototyping facilities to enhance its production process and test the viability of new materials, parts and fabrication techniques. Lush have also been appointed an Associate Partner in the Innovation Studio.
- In support of start-up talent AUB has also introduced two new awards in enterprise and innovation to be rewarded cash prizes, paid residency at The Old School House Boscombe (TOSH) and the Innovation Studio.
- AUB supports the thriving cultural scene in the region as a key to attract and retain talent locally and have recently acquired Bournemouth's last surviving art deco theatre The Palace Court Theatre in which is now undergoing a multi-million pound renovation and will be used as a teaching and rehearsal space and a performance venue.

Bournemouth University – a large generalist university with over 18,000 students and one of the largest employers locally, BU boosts skills and talent, while also creating quality high skilled jobs.

- Over a fifth of enrolments in 2021/22 originated from the local area, and BU also brings global talent and diversity to the region, attracting learners from over 120 countries.
- One of the largest providers of placements in the region, embedding education into practice and providing skills to employers, BU uses its expertise as a catalyst for growth and bringing £1million per day into the local economy.
- Wide range of specialist subjects that align with the local demand - from business and sustainability to medical science and computing.
- The applications to enrolments ratio broadly equate to 5:1 with a surge in applications rising by a quarter on the previous year.
- Key partnership with University Hospitals Dorset NHS Foundation Trust supports workforce development and critical research in areas as diverse as orthopaedics and medical imaging. Over 470 BU students are on placement and 200 alumni are currently employed across the local hospitals - [Case study - Partnership for healthcare skills for Dorset | Dorset LEP](#).
- The [Institute for Medical Imaging and Visualisation](#) at Bournemouth University contributes to new medical products, intellectual property developments and research for the next wave of 3D medical imaging, meeting the needs of industry, the healthcare sector and technical education. BU is also a key partner in the Assistive and Accessible Technology Policy Lab, helping to advise the government and embed the university's research into assistive technology.
- BU is home of the world leading [National Centre for Computer Animation](#), [The Centre for Digital Entertainment](#) and the [International VFX Hub](#). Areas of expertise include visual effects, computer animation art and design. The university also runs the annual [BFX Festival](#) - the UK's largest visual effects, computer games & animation festival bringing industry professionals, inspiring talks and technical masterclasses by some of the greatest studios from around the world to Bournemouth. BU also offers a wide range of Media, Film, TV & Music Production studies in collaborative state of the art creative environments, offering industry-standard facilities and exciting work placement opportunities.
- BU works to protect and preserve a sustainable environment, with research into invasive species, ecosystem management and climate change and is among the top universities in terms of its sustainability agenda and vision. The Times Higher Education (THE) Impact Rankings 2022 ranked BU in 42nd place out of 1,406 universities globally on its progress against the [UN Sustainable Development Goals](#) (UNSDGs). The university is first in the UK for Climate Action.

By introducing a number of initiatives over recent years to create an environmentally friendly campus, BU has also won a number of awards. BU also offers a range of courses in Life and Environmental sciences.

- BU's Computing & Informatics courses are accredited by the British Computer Society (BCS) and offer students the opportunity to gain Chartered IT Professional status. The courses on offer are evolving to reflect the sector, and include IT for business, computer networks, cyber security, data science and more – all sought after specialisms ensuring graduates are well prepared for the world of work and help to combat the shortage of highly skilled staff in the industry. BU's unique expertise includes cyber security, big data and the Internet of Things.
- The Bournemouth University's school liaison programme was designed to boost attainment, build knowledge of HE and careers and promote confidence and self-belief across school leavers. In 2020/21 the programme delivered: 114 outreach activities; 13 HE Careers Fairs; 44 events providing HE experience (campus visits, lectures and workshops), and 49 presentations on HE, student life and finance. Their work reached around 5,000 young people from 51 schools and colleges, 19 of these in the local area. The team's Books & Stories programme was recently highlighted by the Office for Students as best practice for attainment raising and also partnered with the BBC to deliver a series of events about fake news and artificially generated news stories.
- The BU's new strategy in career delivery has been focused on graduate retention locally and closer collaboration with local councils and businesses. Almost 4,000 students attended the online careers fairs over 2020/21 and the autumn term of 2021/ 22 and many local companies from a range of industries were among the 336 employers represented. Similarly, local business speakers featured across all career programmes and events. The digital skills masterclasses brought local digital employers to BU, showcasing local LMI and exposing students to the thriving growth sectors in the region. Some events were particularly relevant to local employer needs, i.e., the Nursing and Healthcare recruitment event and seasonal/ part-time jobs fair.

Charity, not-for-profit and commercial independent training and employer providers

- 200+ providers across BCP and Dorset
- Accounting for significant proportions of learning for those aged 25+ (30%)
- Delivering circa 40% of all the apprenticeships starts.
- Key education and skills providers for businesses
- Strong Dorset & Somerset Training Providers Network (DSTPN) – leading on a joint agenda and knowledge sharing across training providers
- DSTPN have recently developed innovative resources to support careers decision making and pathways – including a directory of training providers dstpn.co.uk/your-future/ and dstpn.co.uk/elevator/

South West link

Weymouth College, based on the West Dorset coast with many of its 3,000 students travelling from the surrounding rural areas.

- Specialises in Level 3 and industry-relevant vocational courses and apprenticeships.
- Grown its apprenticeship programme from 10% of the provision in 2017/18 to 17% in 2020/21.
- 94% of apprentices were in employment or further study after completing their programme, 85% employed by the same employer.
- Has focus on *health and social care, construction, automotive, engineering, as well as creative and visual arts*.
- The College also includes *the Dorset Centre for the Creative Arts* and the *Dorset Training Academy* working directly with businesses to support growth needs.
- Located in one of the most deprived areas in Dorset, it provides employment pathways to students from a variety of backgrounds.
- In 2020/21, over a quarter (28%) of the 16-19 learners came from the 20% most deprived communities nationally.

Kingston Maurward College – A specialist college with a focus on rural economic development, life sciences and environmental sustainability.

- *750 acres of gardens and practical teaching facilities in the heart of Dorset. A college within a country estate.*
 - Is one of the few independent institutions nationally specialising in *agricultural development, sustainable land management and rural business*.
 - Focused on work-related training and study, up to and including degree-level, in its specialist areas above and allied industries, including outdoor adventure provision and preparation for the armed forces
- ✓ New investments since the last update on the estate include:
- £3.5M university and rural business centre
 - £2M flagship decarbonisation ground source heat project
 - New estate shop, cafes and tourism focus.

South Central links

South Central links include Brockenhurst College and Winchester, Southampton and Solent Universities.

Education levels

As established in [previous research](#), highly educated workforce correlates with higher labour productivity and over the past 15 years, BCP has seen the number of its local residents educated to higher-level qualifications doubling, while the pool of people with no formal qualifications shrinking, which is in line with trends seen nationally.

The largest increase since 2005 is in the number of working age people in BCP that are educated to Level 4 and above, which reached 40% of the workforce in 2021 (from 24% back in 2015) – a significant structural change over a relatively short period of time. However, this trend has been less uniform over the years and is now 3 percentage points behind the national levels.

Over the same period, the proportion of working age people with no formal qualifications halved (from 10% to less than 5% of the workforce), compared to the England average of 6%. Still, a fifth of the working age population in BCP (20%) and nationally (22%) does not hold a Level 2 qualification, which is regarded a benchmark for employability.

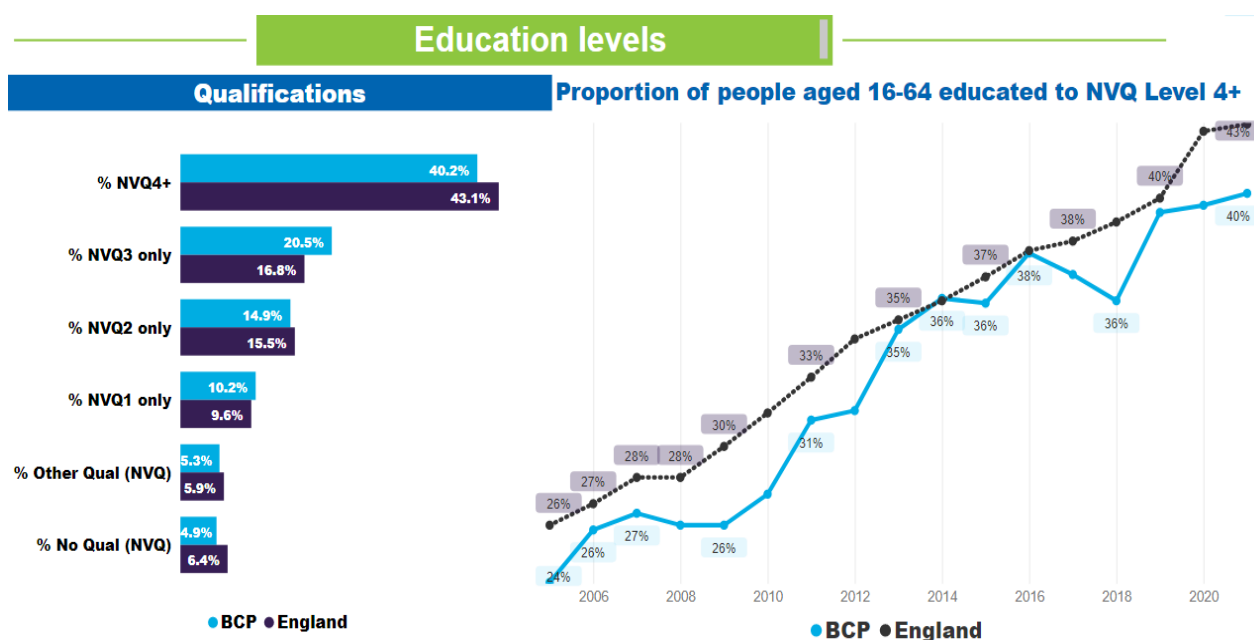


Figure 44. Proportion of residents aged 16-64 educated to NVQ levels and NVQ4+ time series BCP vs England. Annual Population Survey, 2021 (published 2022)

Education levels by area

The trends of increased higher qualifications are uneven across local areas.

There are higher qualifications levels across Bournemouth and lower in Poole and Christchurch, where the proportion of people with no qualifications is double the region average.

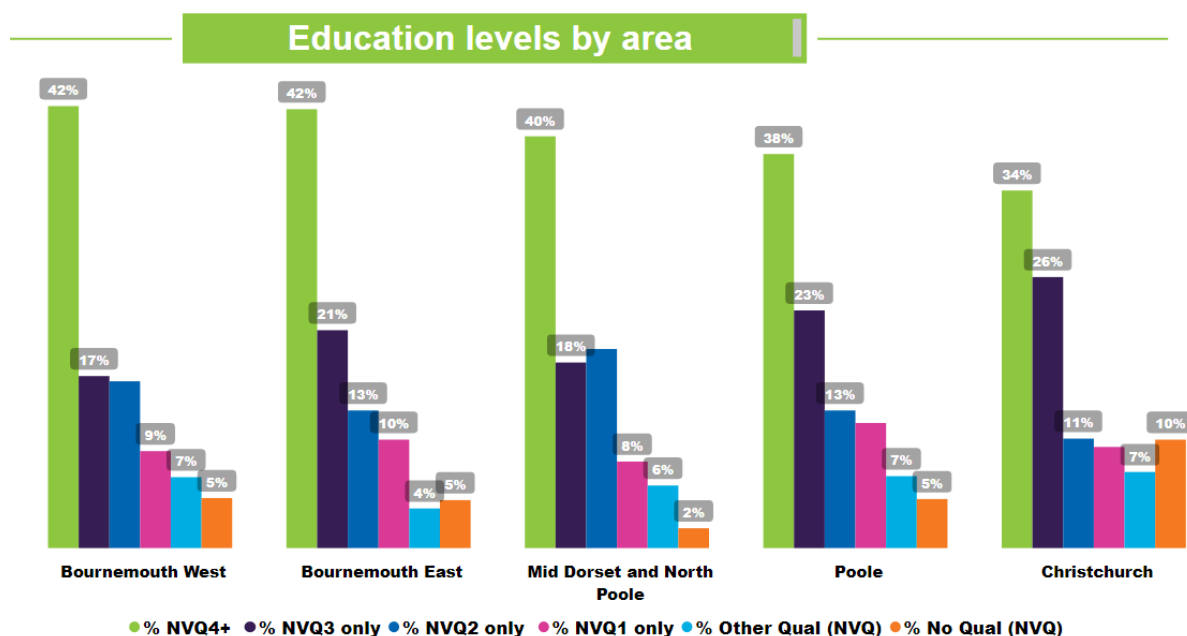


Figure 45. Proportion of residents aged 16-64 qualified to NVQ levels, BCP areas. Annual Population Survey, 2021 (published 2022)

Note. Parliamentary constituencies partly extend beyond the BCP Council boundaries – see map in [Glossary](#)

Adult Further Education and skills participation

In a context of significant shifts in adult education and training where a combination of cuts in funding, changes in policy and eligibility and pandemic disruptions have led to a sustained decline in participation over recent years nationally, we have seen participation in fact holding up well in Bournemouth, Christchurch and Poole. While an 18% decline in adult education participation was recorded between 2014/15 and 2020/21 in BCP, the decline seen nationally is considerably more pronounced (37%↓) and having in mind the turbulent context, participation has remained relatively stable in recent years.

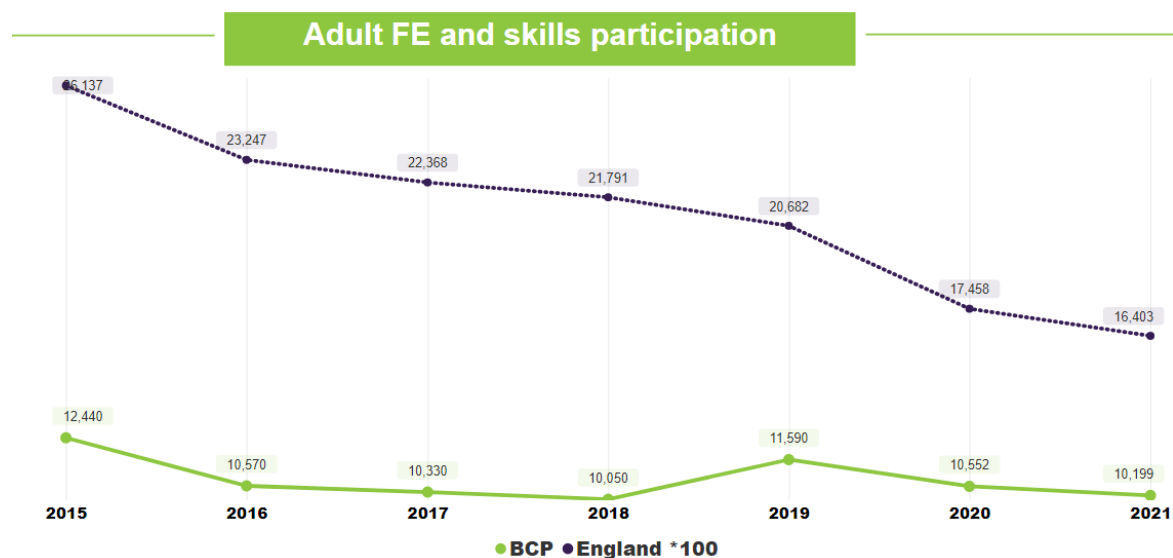


Figure 47. Adult FE and skills participation time series. Further education and skills geography tool: 2014/15 to 2018/19 | Explore Education Statistics Further Education and Skills Participation 2018 - 2021

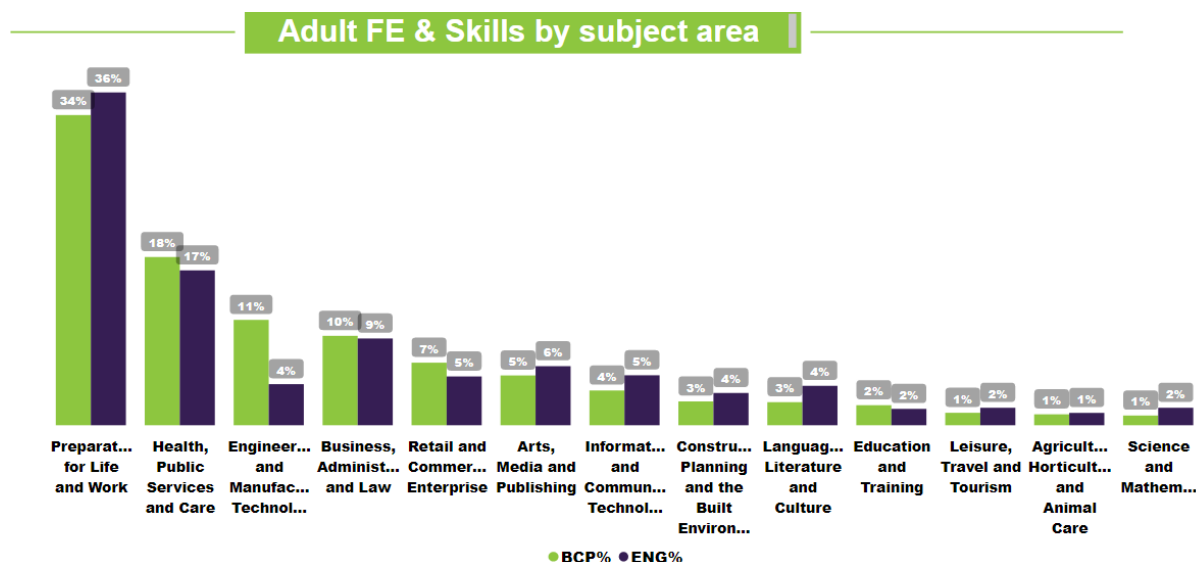


Figure 46. Adult education and training achievements – Dorset LEP and England Explore education statistics – Further Education and Skills 2020/21

In terms of subject areas, BCP's adult FE and skills achievements largely follow the national picture, with higher proportions of achievements in Engineering, Health and Retail, which reflects the local labour demand.

Apprenticeship participation

Mirroring national trends, BCP saw apprenticeships participation dropping in recent years. In BCP, participation fell by a fifth between 2014/15 and 2018/19 and an additional 4% decline was recorded over the past two years, although trends picked up over the past year.

Prior to the pandemic, the decline was largely associated with the 2017 reforms that introduced the apprenticeship levy and changed the funding regimes with an emphasis on higher-level qualifications. Consequently, the decline in participation nationally is driven by a rapid decline in intermediate level (Level 2 apprenticeships), whilst in contrast, higher apprenticeships have increased steadily over the same period (**DfE Apprenticeships and Traineeships 2020/21**).

Apprenticeship participation figures for the 2020/21 academic year show there were circa 4,630 apprenticeships taking place in BCP, which marked a 1% increase on the previous year, and compared to a 0.8% decline nationally.

The 4% decline from 2018/19 was largely accounted by younger apprentices in the under 19 age group (22%↓), while 25+ participants increased by 3% and accounted for 54% of all apprenticeships in 2020/21 (from 50% in 2018/19).

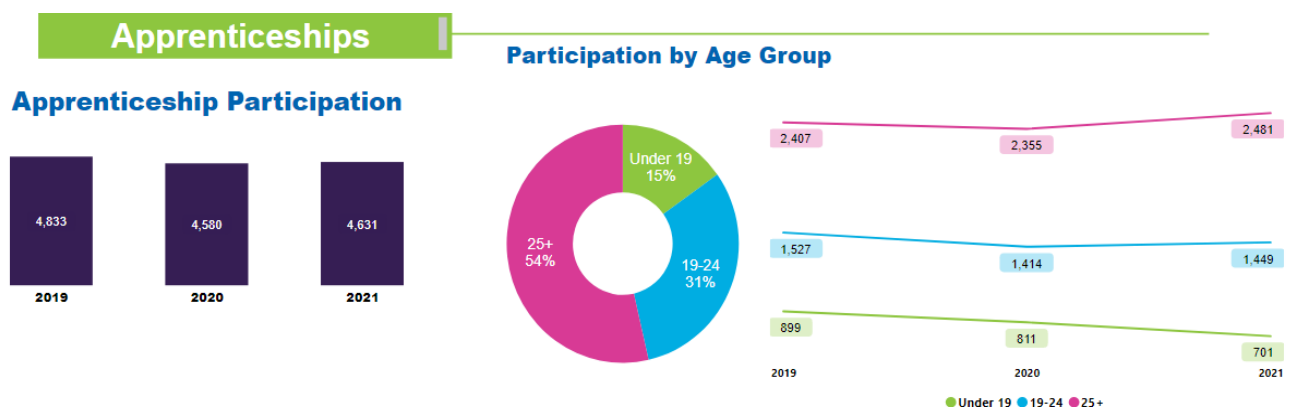


Figure 48. BCP Apprenticeships Participation 2020/21. Explore Education Statistics Apprenticeships and Traineeships 2020/21

Apprenticeship starts

Apprenticeship starts figures for the 2020/21 academic year show:

- There were circa 2,200 apprenticeship starts in BCP in 2020/21 – 7% increase on the previous year, compared to 0.3% decline nationally.
- Apprenticeship starts however declined by 12% from 2018/19 academic year, with largest decline again seen in the under 19 age group (30%↓), while apprenticeship starts amongst those aged 25+ declined by only 5%.
- Under 19s accounted for only 17% of starts (n=365) compared to 20% nationally, while 25+ learners accounted for 56% of all starts in 2020/21 (from 52% in 2018/19), compared to 50% nationally.
- Intermediate apprenticeships (Level 2) declined by 39% from 2018/19, while Higher apprenticeships (Level 4-5) increased by the same margin (38%↑) and accounted for nearly a third of 2020/21 starts (31% or 680 starts) from a fifth back in 2018/19.

It is yet to transpire whether this translates in completion rates over the coming years, as currently Level 2 and 3 (Advanced apprenticeships) account for over 82% of all achievements in the region.

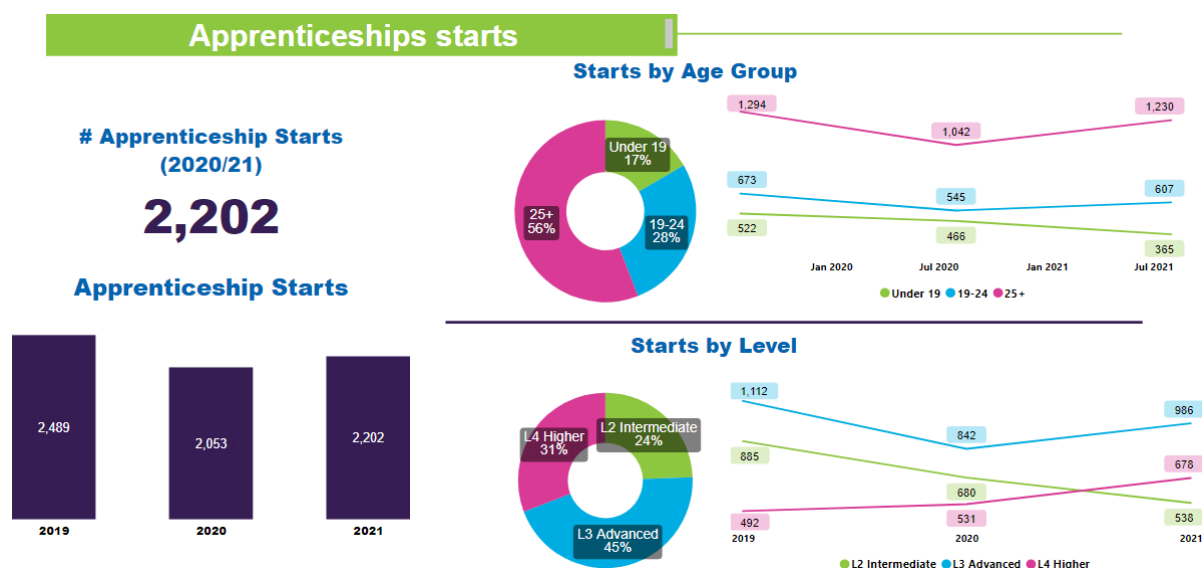


Figure 49. BCP Apprenticeships Starts 2020/21. Explore Education Statistics Apprenticeships and Traineeships 2020/21

Apprenticeship achievements

Another positive development noted over 2020/21 is the increase in apprenticeship achievements, picking up by 18% in BCP on the previous year, versus 7% in England. Yet there is a 15% fall on pre-pandemic levels and the uplift is likely affected by disruptions, breaks and delays in learning throughout the pandemic.

- Whilst seeing an increase, overall achievements are still modest and represent around 52% of the apprenticeship starts in BCP vs 49% nationally, indicating serious attrition concerns.
- The largest decline in achievements was seen in the under 19 age group (30%↓), while amongst those aged 25+ the decline was just 1% and accounted for 45% of all achievements in 2020/21 (from 39% in 2018/19).
- Also, mainly due to the distortion caused by the overall decline in both starts and achievements among the youngest age group (under 19s), achievement rates currently are significantly higher for them (achievements accounting for 80% of all starts, compared to 30% for those aged 25+).
- 2020/21 also saw a substantial on year decline in the overall proportion of STEM starts that fell from 26% in 2019/20 to 21% in 2020/21 in what is a worrying trend, which is possibly exacerbated by the decline in Intermediate and Advanced apprenticeships, which have higher proportions of STEM subjects.

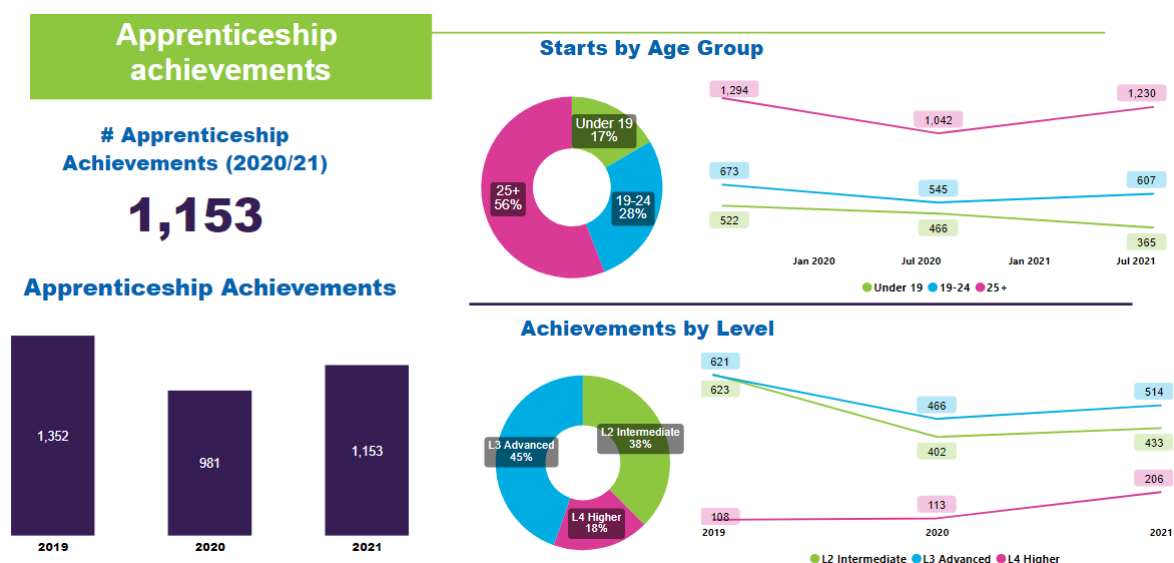


Figure 50. BCP Apprenticeships achievements 2020/21. Explore Education Statistics Apprenticeships and Traineeships 2020/21

Apprenticeship achievements by subject area

Apprenticeship subject areas in the area directly respond to local employer needs – with Health and Care, as well as Manufacturing, Engineering and Business being most prevalent in BCP, making up over two thirds (75%) of all achievements over the past academic year.

Over the past two years, many apprenticeship areas saw decline in the number of achievements occurring in 2020/21 when compared to pre-pandemic levels (2018/19), but the area most affected unsurprisingly is Travel and Tourism with a striking 78% fewer achievements in 2020/21 when compared to pre-pandemic levels in 2018/19. Over the same period, achievements increased by a similar margin (75%↑) in Information and Communication Technology, reflecting the accelerated digitisation across sectors.

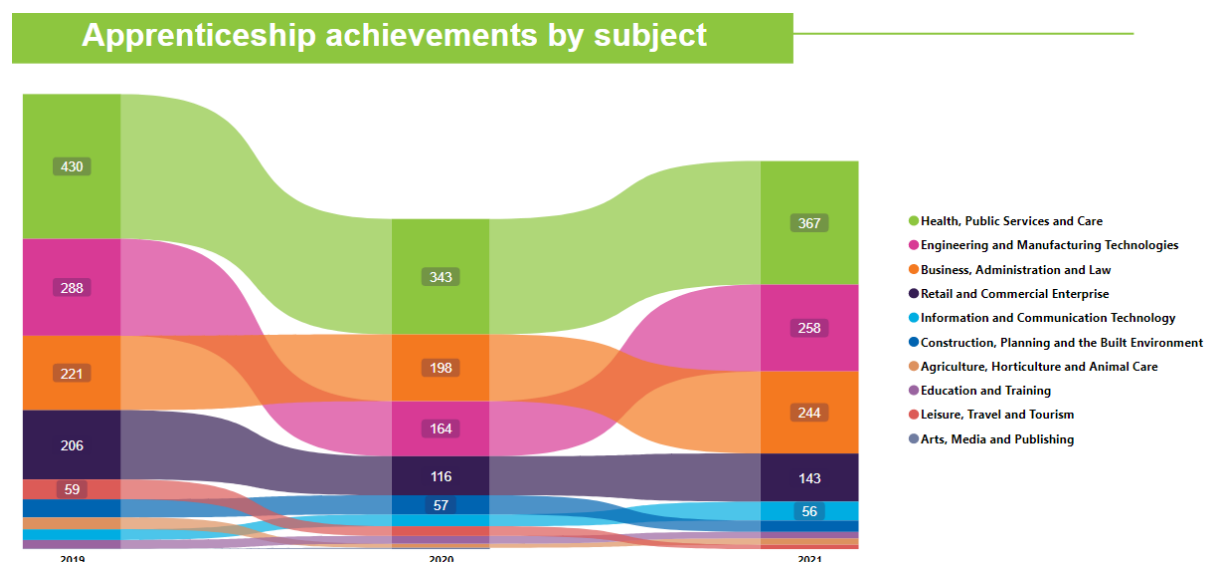


Figure 51. BCP Apprenticeships achievements by subject area 2020/21. Explore Education Statistics Apprenticeships and Traineeships 2020/21

Higher Education Qualifiers

With over 22,000 students enrolled (16% non-UK) and close to 7,000 qualifying in a range of specialisms each year from the three local universities, these institutions play a critical role in attracting and developing high skilled global talent and present an unrivalled opportunity for the region in terms of retaining that human capital (HESA HE Qualifiers).

The specialism areas contribute to the skills and industry mix of the local economy with higher representation of qualifiers in Design, Creative & Performing Arts, Computing, Media and Communications, Business and Management, as well as Subjects allied to Medicine, reflecting the specialist strengths our local institutions are recognised for.

Areas where BCP HE provision is falling behind the national are: Education and Teaching, Engineering and Technology, Medicine and Dentistry, Law, Mathematical sciences, as well as Architecture, Building and Planning.

The high demand for places has continued to blossom over the past two years in a testimony to the quality of provision but also as a possible response to the surge in youth unemployment seen throughout the pandemic. The applications to enrolments ratio for local institutions broadly equates to 5:1 – although that differs by institution/ subject.

Data provided by Bournemouth University shows a surge in applications over the past two years with latest admissions cycle from 2021/22 seeing numbers rising by a quarter on the previous year. The proportion of local enrolments also increased to 21% of all enrolled in 2019/20 originating from the local area.

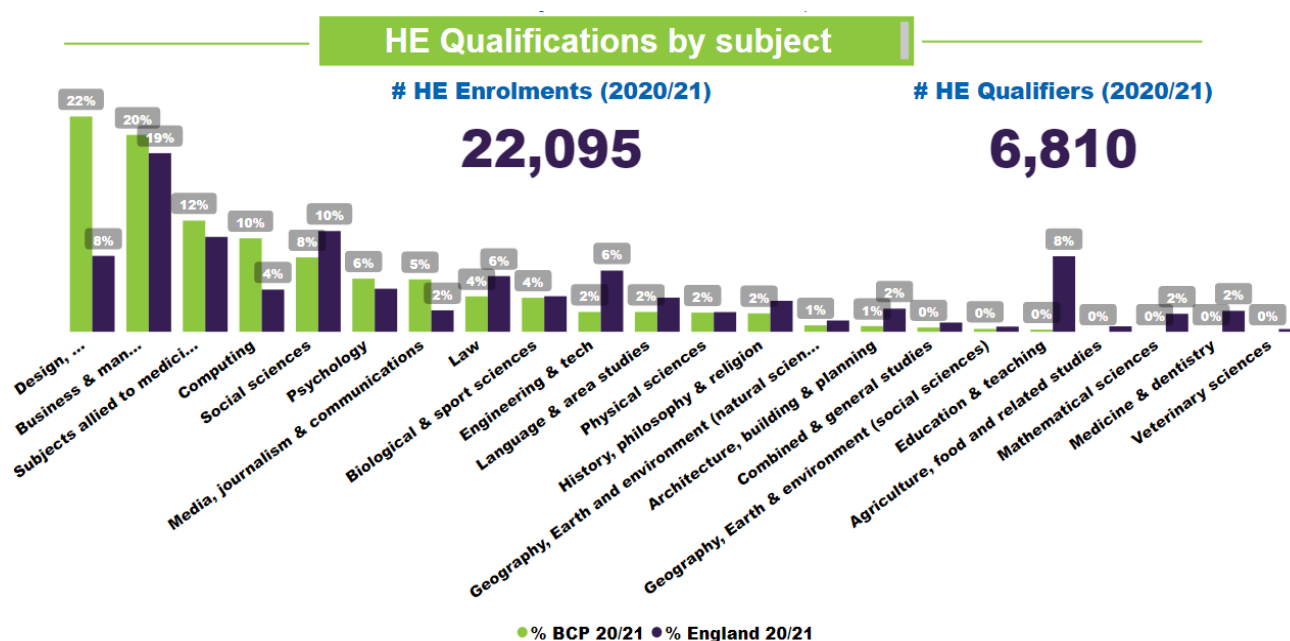


Figure 52. BCP 2020/21 HE Enrolments, HESA 2021; HE Qualifiers by Subject, HESA HE qualifiers by HE provider and subject of study 2020/21

Key stage 4 destinations

The vast majority (95%) of the c.3,500 pupils finishing key stage 4 (GCSE and equivalent) in BCP state-funded mainstream schools in 2019/20, continued in sustained destination (including education, apprenticeship, or employment) in the following year. This is marginally higher than nationally but marks a small 0.6 ppt drop from the previous year.

The most common destination is education (86%) albeit slightly lower than nationally (87%). Proportions of pupils in sustained education have remained stable since 2016/17 - up 6 percentage points since 2010/11, reflecting the statutory requirement being introduced in 2013. BCP's pupils were also more likely to be in apprenticeship (4.2% vs 3.7% in England) or employment (4.1% vs 3.1% in England).

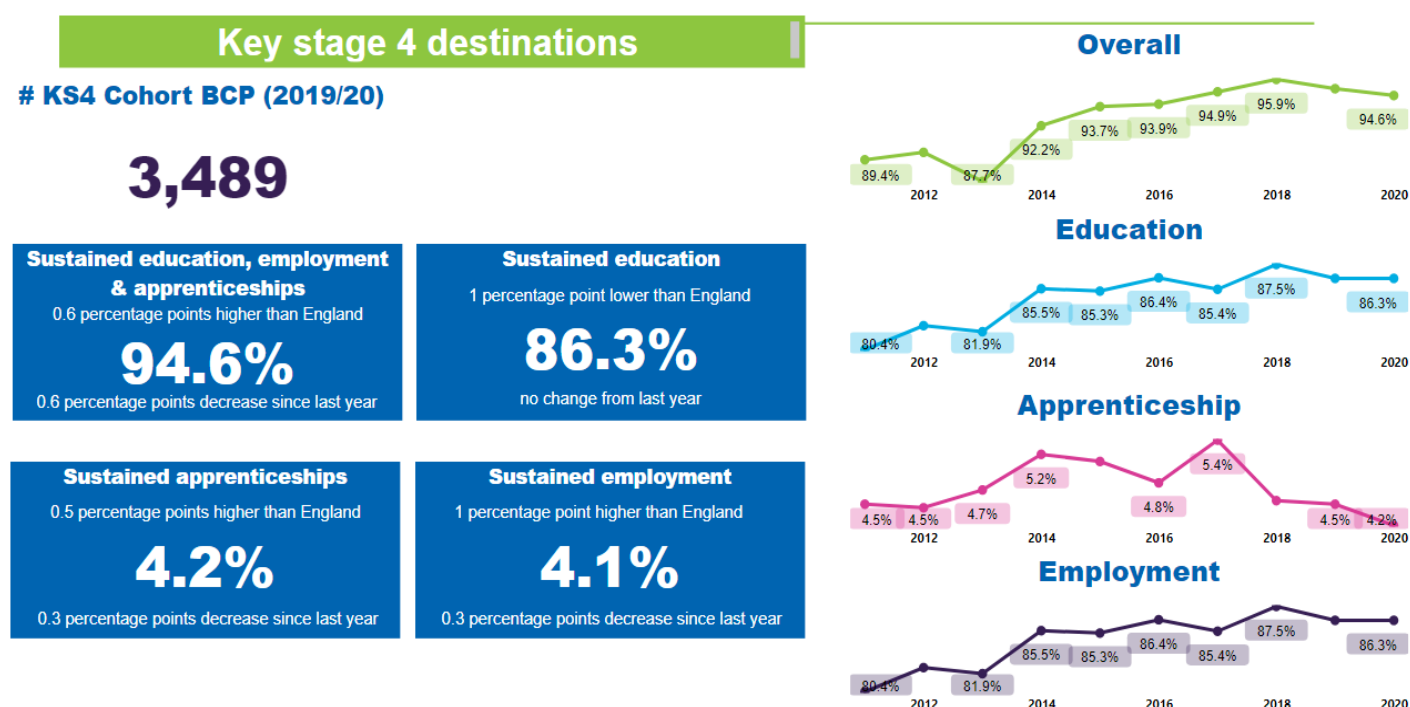


Figure 53. KS4 destinations in 2019/20 of 2018/19 leavers, DfE, (published 2021)

Almost half (46% - down 3ppts) of the cohort went to school sixth form and 39% to Further Education (3 ppts on year increase). Disadvantaged pupils (eligible for pupil premium and free school meals) were far more likely to go to further education (54%) than their non disadvantaged peers (37%) highlighting the colleges' important role in improving the life outcomes and tackling disadvantage.

The outcomes for disadvantaged young people continue to be considerably less favourable. They were three times more likely to enter a transient state – 11% did not have a sustained destination one year following key stage 4, compared to 3.5% of non-disadvantaged pupils.

Key stage 5 destinations

In BCP, **79% of the circa 3,670 students** who reached the end of key stage 5 (A Levels or equivalent, aged 16-18) in state funded schools and colleges in 2018/19, had a sustained positive destination (education, apprenticeship, or employment) in the following year - slightly lower than the previous year and falling behind the national average by 1.5 percentage points.

Post 16-18 destinations differ more markedly from the national reference with young people from the area more likely to be in employment or apprenticeship and less likely to continue in education.

In terms of educational destinations, in line with national trends, one in ten (10%, n=375) went onto further education, and close to a third (29%, n=1,047) continued in higher education, which was lower than the national reference (35%). Analysis of provider data suggests many choose a local institution with c. 900 students from the local area entering Bournemouth University over the same year.

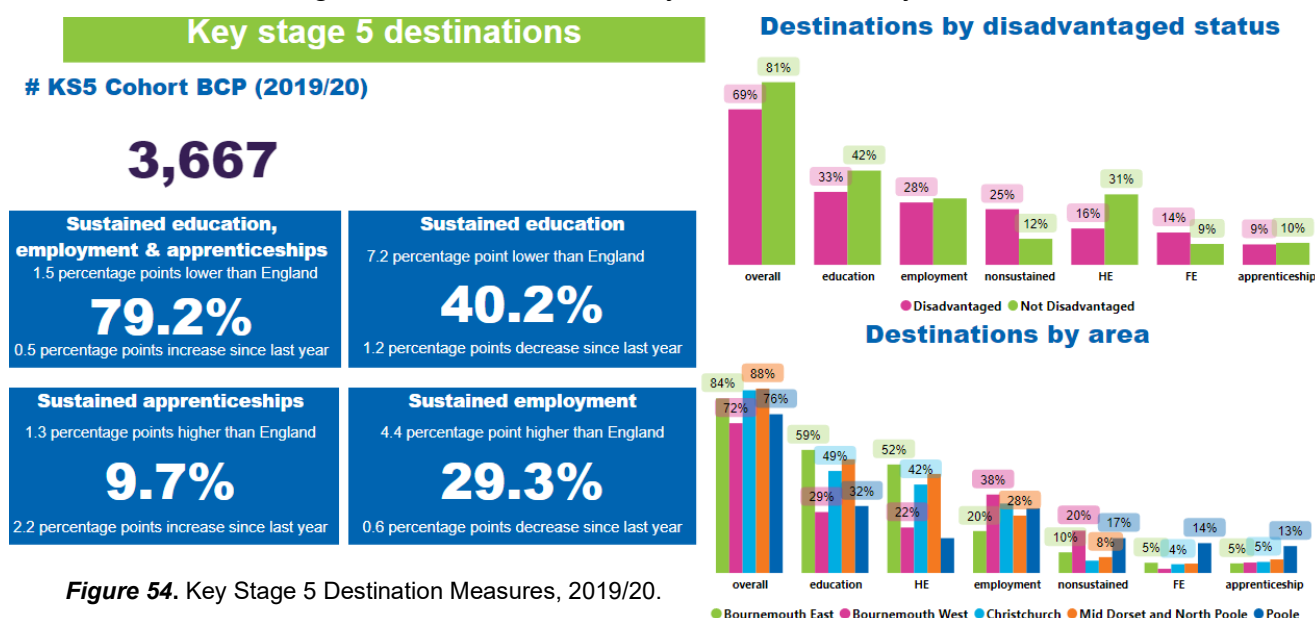


Figure 54. Key Stage 5 Destination Measures, 2019/20.

Note. Parliamentary constituencies partly extend beyond the BCP Council boundaries – see map in [Glossary](#)

Lower geographies also reveal significant disparities within places:

- Bournemouth West had the lowest (72%) and Mid Dorset and North Poole the highest (88%) proportions of young people in sustained overall positive destinations.
- More than half (59%) of Bournemouth East students were in education and only 29% of Bournemouth West.
- Every second student from Bournemouth East (52%) moved into higher education, compared to every fifth in Poole (17%).

Destinations markedly varied for disadvantaged students across all measures.

- Disadvantaged students were 12 ppt less likely to have an overall sustained destination compared to their non-disadvantaged peers and this gap has widened.
- Young people from disadvantaged backgrounds were also over twice more likely to enter an unsustained destination than their non-disadvantaged peers.

Adult FE and skills destinations

There were 6,830 adult learners who completed an FE & skills training course in 2018/19 in BCP, a 3% increase on the previous year, and the learners' destinations were favourable in the region compared to the national average.

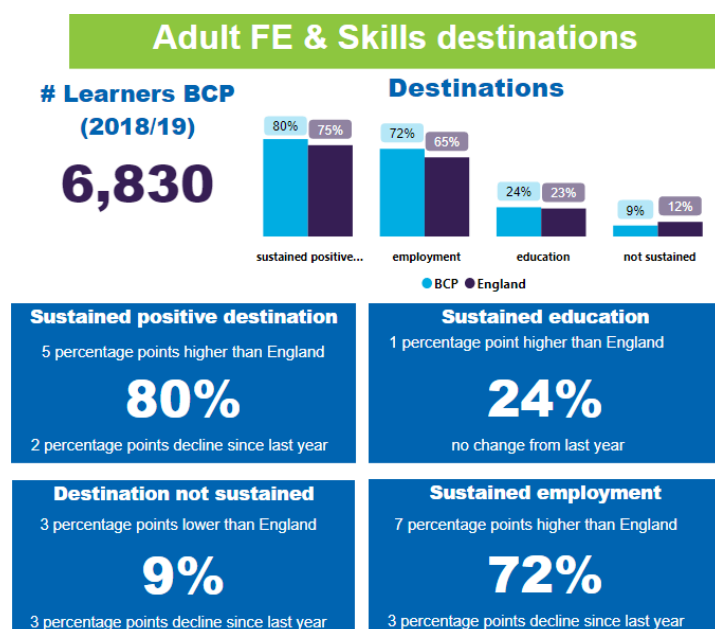


Figure 55. BCP adult learning destinations. FE outcome-based success measures, 2018/19

The subject areas with largest number of learners were Health, Public Services and Care and Preparation for Life and Work. Most subject areas had proportions of sustained positive outcomes exceeding 80%, with Education and History recording over 90% of learners in positive destinations.

The most successful courses in terms of employment outcomes were Business, Education, Engineering and Health, where employment rates were above 80%, while ICT, Engineering and Construction offered the highest returns in terms of earnings.

These figures demonstrate FE and skills learning provides positive pathways and is often a steppingstone to opportunities for many in Bournemouth, Christchurch and Poole with high proportions able to move into employment or further learning.

The majority (80% with 75% national reference) had moved into a sustained positive destination over the following year, which is a 6 percentage points increase from 2013/14, but marks a small decline on the year. Similarly, the proportion of adult learners who moved into a sustained employment (72%) was significantly higher (7ppts) and saw a long-term increase (by 6 ppts since 2013/14), albeit a decline was recorded on the year.

Destinations by subject area

Sector Subject Area	# Learners	Sustained Positive Destination	Median Salary	Sustained Employment	Not sustained
Health, Public Services and Care	1,980	86%	£17,480	82%	7%
Preparation for Life and Work	1,790	71%		55%	12%
Engineering and Manufacturing Technologies	820	87%	£20,430	85%	7%
Business, Administration and Law	790	89%	£18,850	86%	6%
Retail and Commercial Enterprise	540	73%	£17,670	66%	13%
Education and Training	190	90%	£12,720	86%	6%
Construction, Planning and the Built Environment	160	81%	£20,220	77%	8%
Information and Communication Technology	160	69%	£22,380	60%	18%
Arts, Media and Publishing	100	86%		51%	8%
Leisure, Travel and Tourism	100	80%	£15,280	73%	10%
Agriculture, Horticulture and Animal Care	70	51%	£16,670	48%	31%
Unknown	60	58%		44%	21%
History, Philosophy and Theology	40	95%		43%	
Science and Mathematics	30	88%		44%	

Figure 56. BCP adult learning destinations by subject area. FE outcome-based success measures, 2018/19

Apprenticeship destinations

Apprenticeships prove to be particularly successful career pathways in the region, where 92% resulted in sustained positive destinations and 90% in sustained employment one year after completion.

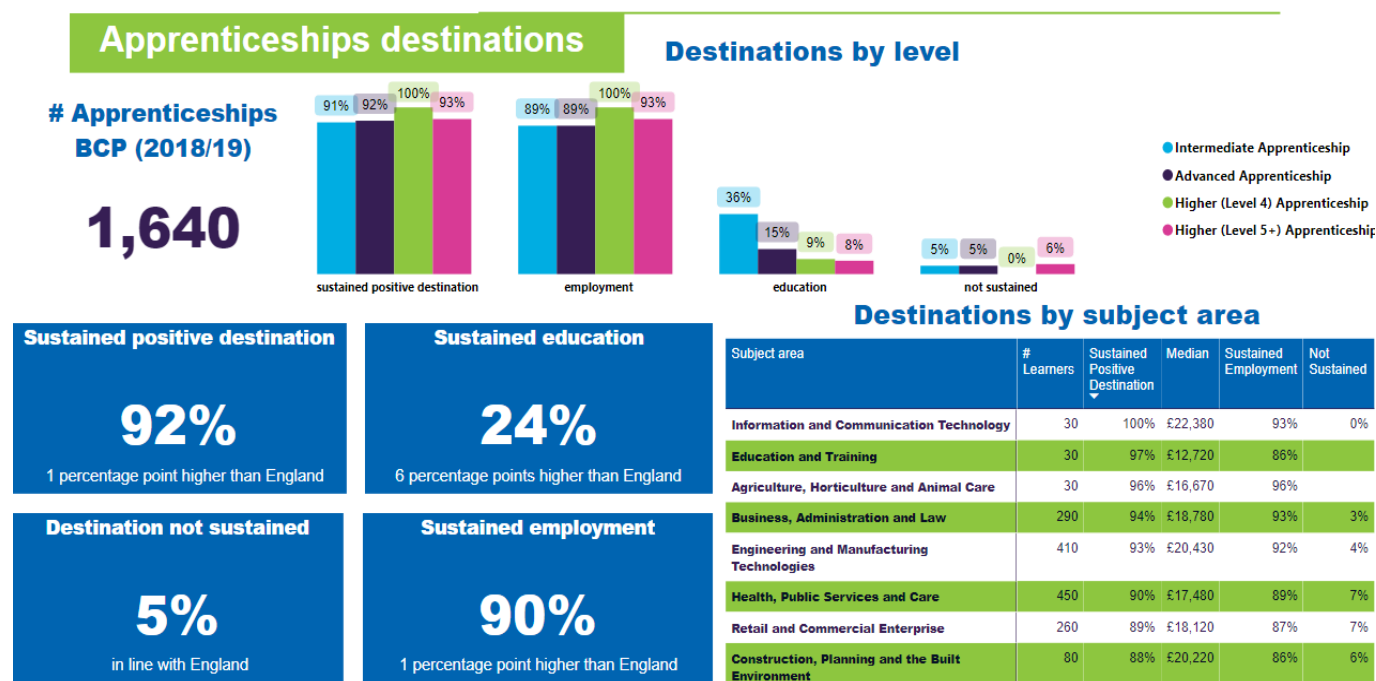


Figure 57. Apprenticeships Destinations 2018/19 academic year. FE outcome-based success measures, DfE, (published 2021)

- Comparing favourably to other learner cohorts, apprenticeships had the highest positive destination rate (92%) after completion compared to 80% for overall FE & Skills.
- There is a reasonable differential between the apprenticeship levels.
- All (100%) of Level 4 higher apprenticeships completions had a sustained positive destination and were in sustained employment with highest average earnings (£28,320), but also far fewer achievements.
- This compared to 91% positive destinations, 89% in employment and £16,220 average earnings for intermediate apprenticeships completers, but they also had the highest proportion (36%) of sustained further education destination.
- Average apprenticeship earnings also differed considerably across subject areas.
- For example, average salaries in ICT reached £22,400 and were over £20,000 in Engineering and Construction whilst Education and Training and Travel and Tourism were at the other end of the spectrum with £12,700 and £15,200 respectfully.
- Sustained employment destinations were high across the board.
- They exceeded 90% in subject areas such as ICT, Engineering, Business, Law, and Agriculture, while employment was lower in Leisure, Travel and Tourism (78%), where there were also the highest proportion of non-sustained destinations (10%)

Higher education graduates outcomes

The latest available Graduate Outcomes Survey data for 18/19 graduates ([HESA, 2021](#)) shows the immediate effects of the pandemic disruption on the graduate labour market. While the majority (87%) of those graduating from one of BCP's three universities were in employment or further study one year later, this was down 6 percentage points compared to those graduating a year earlier (94%). The decline was largely accounted for by the proportion of graduates in full-time employment, which fell by 14 percentage points across BCP's institutions.

At an institutional level latest data indicates that 89% of graduates from Bournemouth University, 86% from Arts University Bournemouth and 87% from AECC University College were in either employment or/and further study 12 months after leaving the institutions, with higher-than-average proportions of graduates from BU in full-time employment (62% vs 56% nationally) AUB graduates in part-time employment (24% vs 11% nationally) and AECC graduates in employment and further studies (12% vs 11% in England).

In terms of salaries, for Bournemouth University the evidence suggests that the initial earnings post-graduation tend to broadly match the national profile. The median salary 1 year after graduation for those graduating in 2018/19 was £22,600, while in comparison, initial median earnings at AUB tended to be lower at £17,500 (Graduate outcomes (LEO): Provider level data, 2018-19), which may reflect the greater tendency for creative industry graduates to be self-employed or enter unpaid or voluntary starting positions.

The medium earnings for BU graduates varied by subject with Engineering graduates earning the most - £36,100 one year after graduation, while in contrast biosciences graduates were earning £16,800 on average.

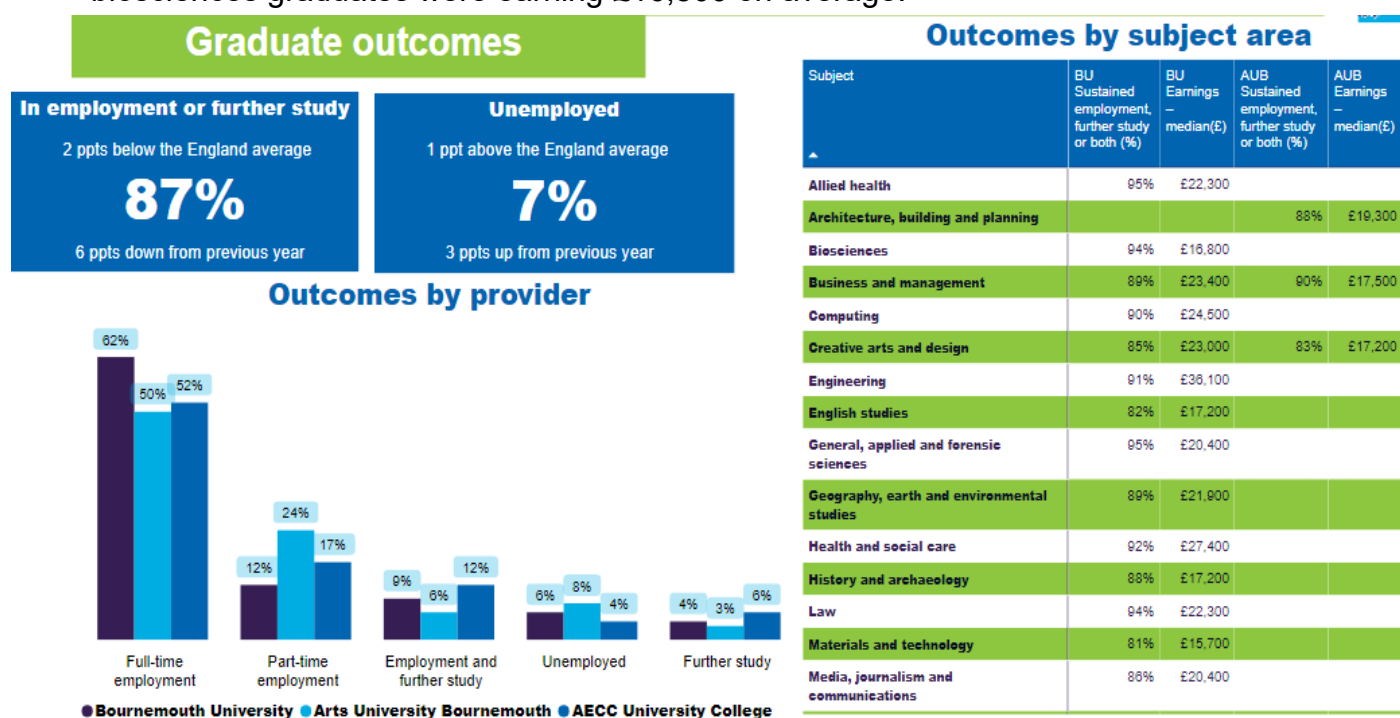


Figure 58. HESA, 2018/19 graduates (published 2021); Graduate outcomes (LEO): Provider level data, 2018-19

Graduate retention

Graduate retention and BCP's ability to provide the quality employment opportunities to incentivise more graduates to stay in the area remains key areas of work, however the latest available data points out some recent decline in that domain.

Fully understanding the graduate retention picture is constrained by a lack of granular data of where graduates specifically choose to live after graduation. However, data available at provider level (Graduate outcomes (LEO). Provider level data, 2018/2019. Published 2021) indicates that one year after graduating from a local HE institution, **a third of graduates from local institutions have chosen to live in the South West.**

Half of graduates live in either London or the South East, which currently attract the largest proportion of graduates. Presumably, this reflects the employment and earning opportunities and is also where many of the students in local institutions originate from.

Provider analysis of the 2018/19 Graduate Outcomes survey from Bournemouth University– indicates some net loss of talent with around a fifth of BU's students originating from the local area on average and 17% of its employed graduates remaining within the local area. This marks a decline by 6 percentage points from the 2016/17 Destinations of Leavers survey but these figures are not completely comparable or controlling for graduate characteristics so should be read with caution.

Glossary

Gross Domestic Product (GDP) is a broad measure of productivity and economic health and represents the total monetary or market value of all the goods, products and services produced within certain geographical borders or sectors over a period.

Gross Domestic Product (GDP)

There are various methodologies to measuring GDP and the Office for National Statistics (ONS) uses approaches by output, income and expenditure. In the output approach of measuring GDP, ONS uses Gross Value Added (GVA) as a proxy for GDP.

The link between GVA and GDP is:

- GVA at basic prices
- plus taxes on products
- less subsidies on products
- equals GDP at market prices (or headline GDP).

Gross Value Added (GVA)

Gross Value Added (GVA) is a measure of economic productivity, where productive output is represented by the value of an industry's outputs less the value of inputs used in the production process. ONS is estimating the contribution of each industry or producer by using GVA at basic prices – or the value of a unit's outputs less the value of inputs used in the production process. As such, it includes subsidies received on products but excludes taxes payable on products.

Parliamentary constituencies partly extend beyond the BCP Council boundaries as illustrated in the map below:

BCP Parliamentary Constituencies

