

AGRI-FOOD



This sector summary brings together the insights we gleaned regarding the Agri-food sector in West Lindsey, both from our desktop research and the various skills conversations we have conducted with employers, providers, and community groups throughout this project.

The sector definition we have used in this work, especially around measuring employment and vacancies, is that set out by the Greater Lincolnshire Local Enterprise Partnership (LEP). The LEP definition of the Agri-food sector encapsulates the activity required to get food from farm to plate. Effectively, this means it captures growing/rearing, manufacturing/processing, and some retail elements.



AGRI-FOOD – SUMMARY



The data tells us that:

- The Agri-Food sector employs approximately 3,500 people, 11.5% of total employment in the district.
- Employment in the sector has grown by four per cent since 2015 compared to nine per cent across Greater Lincolnshire and 11 per cent nationally. This relatively lower level of growth has been driven by falls in employment in the 'Rural West Lindsey' area.
- Despite this growth, the sector is projected to decline by around 300 jobs over the next decade. However, the plans around the local Ag Zone mean that this outcome is unlikely.
- Due to replacement demand, the sector will need to fill approximately 600 existing jobs before the end of 2030.
- Vacancy numbers tend to be low within the sector, but since the start of 2023, numbers have increased significantly, suggesting strong demand presently.
- Starts in Agri-Food Apprenticeships and Education and training courses are low in number given the size and importance of the sector locally, but numbers have remained constant in recent years.

Through our skills conversations, local stakeholders are telling us that:

- West Lindsey, with its rural identity, local investment plans, plus major agrifood education and innovation developments in the area, is well placed to build its sector footprint – locally and through influencing developments across Greater Lincolnshire and beyond.
- The importance of raising aspirations about high-quality, high-tech local careers (not simply jobs) in the Agrifood sector.
- The ability and commitment to travel to rural jobs requiring one's own transport is a major financial and cultural barrier. Some employers have piloted providing their own bus transport, but this has not proved sustainable. A local employment agency reports that rural agricultural vacancies are especially challenging.

Key Considerations:

- Can West Lindsey further capitalise on its wealth of nationally renowned agri-food sector businesses and academic and educational institutions, supporting the higher tech developments (e.g., robotics) and the latest skills required by the sector as it reduces its reliance on a fragile labour supply chain?
- There is a clear opportunity to raise aspirations locally about exciting career opportunities in Agri-food, which include entry, intermediate, and higher-level roles.
- Transport and travel arrangements in West Lindsey remain real barriers to growth for expanding businesses and residents seeking to progress careers across and beyond rural West Lindsey.

AGRI-FOOD SKILLS CONVERSATION FEEDBACK



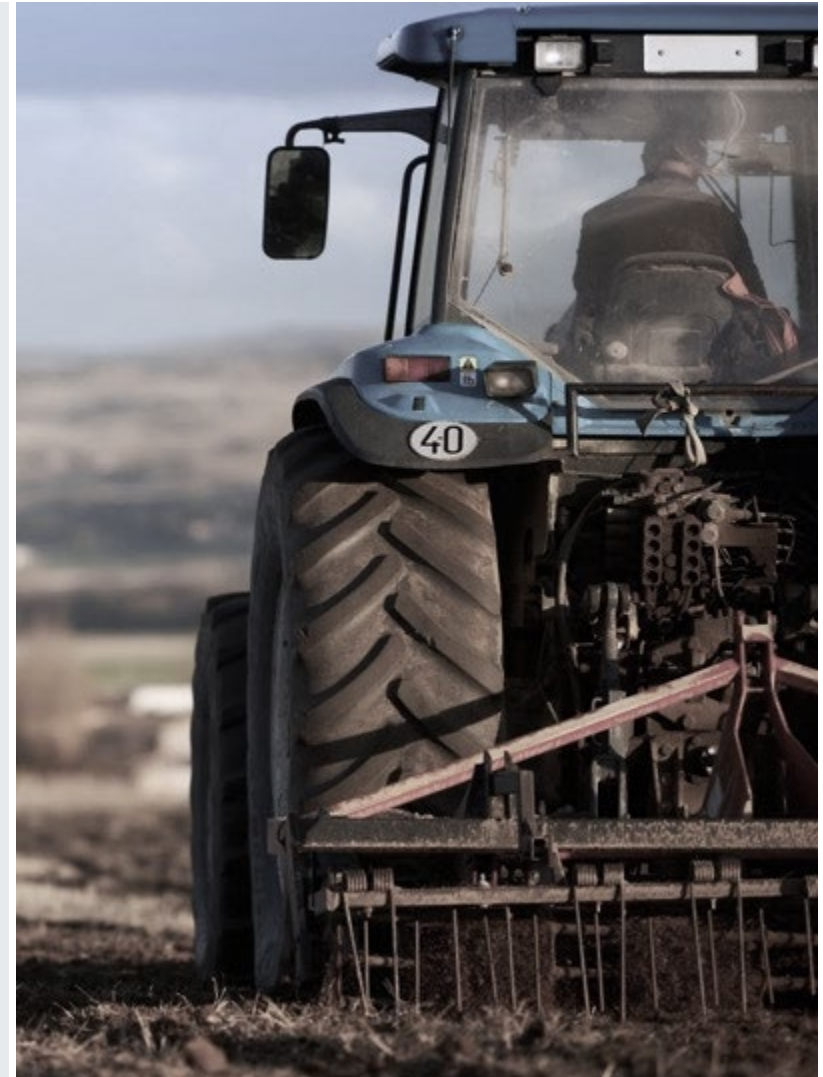
- A consensus about the lack of larger Agri-Food employers in West Lindsey, which typically results in lower uptake of Apprenticeships and Skills Bootcamps. 'The big key agricultural companies are in the north or south of the County, not in West Lindsey'; 'Smaller employers may only have one apprentice every three years, and the momentum to build sustainable opportunities lies in areas where the churn is greatest'.
- Employment data regarding vacancies may be skewed because family employment in the sector may not advertise vacancies online.
- Food Manufacturers emphasised two key skills shortages – Production Operatives (with supply reduced by Brexit) and Class I Lorry Drivers, although these shortages were described as less acute than previously.
- Sector employers have developed their employer offer through more flexible/part-time working and new Apprenticeship pathways for skills shortages, generating new entry pathways for younger people and greater job accessibility for adults.
- The ability and commitment to travel to rural jobs requiring own transport is a major financial and cultural barrier, especially in Gainsborough. Some employers have piloted providing their own transport, but this has not proved sustainable. A local employment agency reports that rural agricultural vacancies are especially challenging.
- Attainment levels in Maths and English remain barriers to local young people accessing Apprenticeships. There are increasing opportunities for students from schools with specific learning needs to thrive in higher apprenticeship career pathways.
- Some seasonal jobs are becoming very 'high-tech' and therefore less easy to fill with local or overseas workers.
- There is a risk, as technology develops, that higher skilled technicians may become less locally-based and more in remote 'control rooms' with local jobs becoming more de-skilled and automated'.
- The importance of raising aspirations about high-quality local careers (not simply jobs) in the Agri-Food sector.
- Local learning providers report challenges recruiting teachers/tutors of the technical/digital skills required in Agri-Food.



AGRI-FOOD DESKTOP RESEARCH - EMPLOYERS



- There are major sector development ambitions in West Lindsey, including the Ag Zone (Agricultural Growth Zone) along the A15 corridor and the Hemswell Cliff LDO and Food Enterprise Zone, both seeking to scale up agri-food locally, capitalising on connectivity with Humber Freeport developments.
- “Between 2015 and 2019, agriculture, food production, and food service sectors in Greater Lincolnshire were responsible for almost 50% of all local jobs growth.” (Greater Lincolnshire LEP, Jan 2022, Greater Lincolnshire Local Skills Report).
- However, Greater Lincolnshire LEP sector forecasts cite Agriculture as a key sector with the lowest forecast job growth. (Greater Lincolnshire LEP, Jan 2022, Greater Lincolnshire Local Skills Report).
- 95% of businesses employ fewer than 10 people and therefore lack professional HR (and skills) support (Agriculture and Horticulture Development Board, 2018).
- A 2022 Institute of Agriculture and Horticulture (TIAH) survey of 681 farming employers reported that 25% were currently seeking staff, and 63% said filling vacancies was “difficult.”
- “The agricultural, horticultural, and food manufacturing sectors have vacancies across all levels, including manual roles, supervisory jobs, machine operatives, quality control, and engineering, that they cannot fill.” (Greater Lincolnshire LEP, Jan 2022, Greater Lincolnshire Local Skills Report)
- Sector-wide long-term strategies emphasise skills needs in “key areas such as automation, robotics, data, leadership, change management, and business skills”. (UK Government, Independent Review into Labour Shortages in the Food Supply Chain, June 2023)



AGRI-FOOD DESKTOP RESEARCH - PEOPLE



- “There are not enough skilled workers in the domestic workforce to fulfil the labour needs of the food supply chain”. (UK Government, June 2023)
- Recruitment challenges included “attitude, motivation, or personality. Personal attributes were closely followed by unsociable hours, competition from other industries, the domestic workforce not being interested in primary production roles, and low pay. However, lack of skills among applicants, lack of affordable accommodation in the local area, competition from other farm businesses, and the fact that farming has a poor image were also cited by over a third of all respondents as barriers to recruitment.” (The Institute for Agriculture and Horticulture, 2022)
- 42% of employers showed a reluctance to hire people who are not from a farming family/background. (The Institute for Agriculture and Horticulture, 2022)
- “Almost a fifth of current permanent/salaried staff are from outside the UK, while only 14% of the seasonal workforce are domestic staff. This suggests that immigration remains the most rapid and effective solution for many employers at this time and should be regarded as such by policymakers, regardless of wider policy.” (The Institute for Agriculture and Horticulture, 2022)
- “Recent changes to agricultural policy, with food producers now having sustainability and net-zero obligations to meet, is only exacerbating the situation, as it requires a completely new set of skills.” (Farmers Weekly, March 2023)



AGRI-FOOD DESKTOP RESEARCH – SKILLS INFRASTRUCTURE



The district is particularly well endowed with contemporary agri-food-based education, skills, and business further and higher educational infrastructure - within West Lindsey or literally on its doorstep.

These include:

- The nationally renowned Bishop Burton / Riseholme Colleges, described as the premier land-based college in the 'UK's most important agricultural county' and specialists in agriculture, animal management, and equine. (Team Lincolnshire, 2023).
- Lincolnshire Agricultural Society – a West Lindsey-based long-standing charity promoting and supporting education, education, food, and farming across Lincolnshire, focusing on engagement with schools.
- Barclays Eagle Labs - Riseholme - partnered with the University of Lincoln with a nationally-renowned AgriTech hub supporting start-ups focused on the future of farming.
- Lincoln Institute for Agri-Food Technology (LIAT)
- Lincoln Agri-Robotics– the 'world's first global centre of excellence in agricultural robotics' (UK Innovation Strategy, July 2021)
- Lincoln Centre for Autonomous Systems. (LCAS)



EMPLOYMENT IN AGRI-FOOD



EMPLOYERS



As of 2022, the Agri-Food sector employed approximately 3,500 people, 11.5% of total employment in the district, the majority of those Agri-Food jobs being sited within the 'Rural West Lindsey' area.

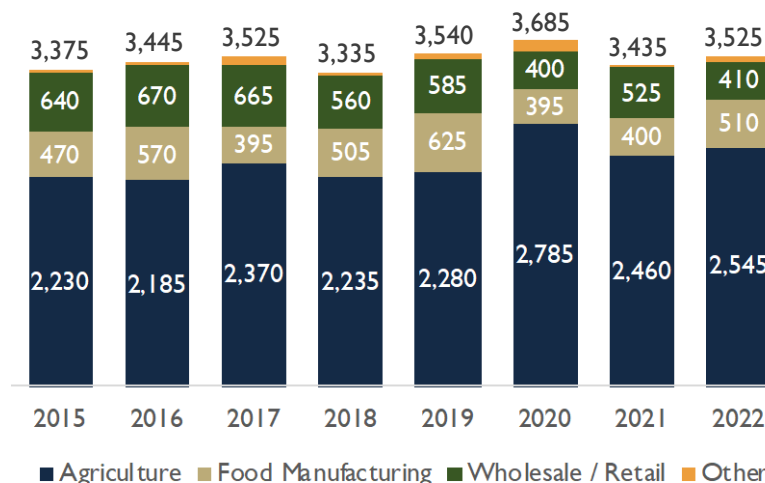
Agri-Food employment in West Lindsey over the long term has increased but not to the same levels seen at Greater Lincolnshire and national levels. Since 2015, the sector in West Lindsey has grown by four per cent compared to nine per cent across Greater Lincolnshire and 11 per cent nationally. This relatively lower level of growth has been driven by falls in employment in the 'Rural West Lindsey' area, with employment in the Agri-Food sector in Gainsborough seeing the only growth over this period.

The sector is projected to decline by around 300 jobs over the next decade. However, the sector will still need to recruit due to replacement demand (i.e., demand arising in the sector due to people leaving the workforce, mainly through retirement), with 600 jobs projected to need filling before the end of 2030.

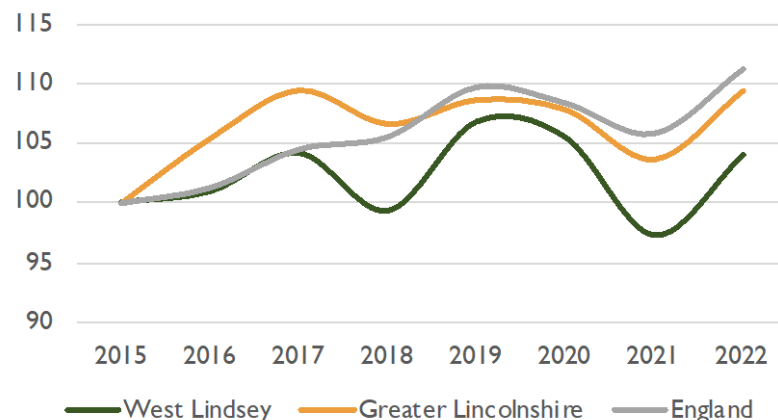
Note: *This analysis does not include Defra data on employment in agriculture due to it being unavailable at the small geographies we are using to define our three sub-district geographies.

Source: Business Register and Employment Survey, Office for National Statistics; Lightcast, under licence from Greater Lincolnshire LEP; Working Futures 2017-2027, Department for Education

Employment in Agri-Food in West Lindsey, 2015 - 2022



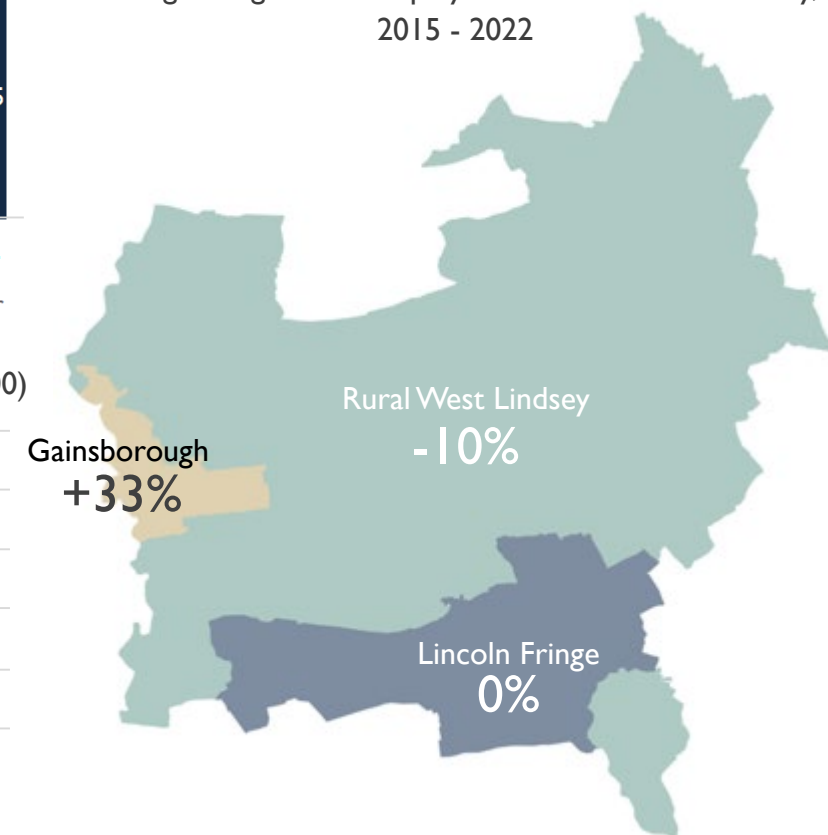
Change in Agri-Food Employment, 2015 – 2022 (2015 = 100)



Employment* in Agri-Food across West Lindsey, 2022



Change in Agri-Food employment* across West Lindsey, 2015 - 2022



VACANCIES IN AGRIFOOD



EMPLOYERS

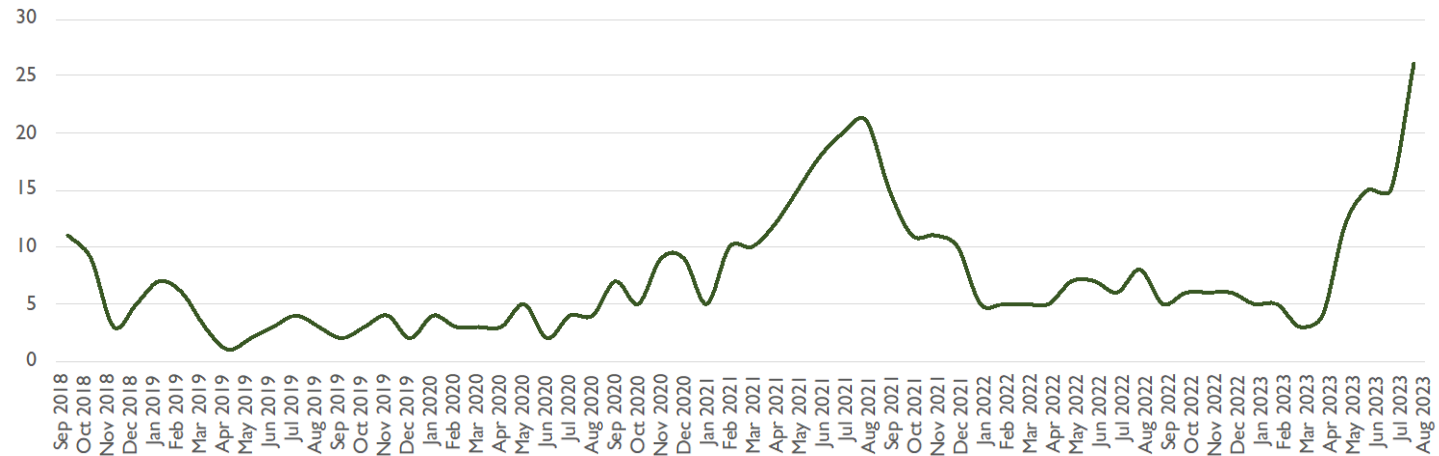


Our analysis shows vacancy numbers tend to be low within the Agri-Food sector. This, in part, could be down to some employers in the sector (particularly the agricultural element) using other means to recruit for positions. However, we can see that there was a strong upsurge in recruitment activity during 2021. During this period, the labour market, both locally and nationally, was routinely described as tight by employers and commentators, and this may have driven employers to use less traditional methods of recruitment to fill vacancies, hence the rise in numbers. 2022 saw a return to “normality,” but since the start of 2023, the number of online unique vacancies in the sector has increased rapidly.

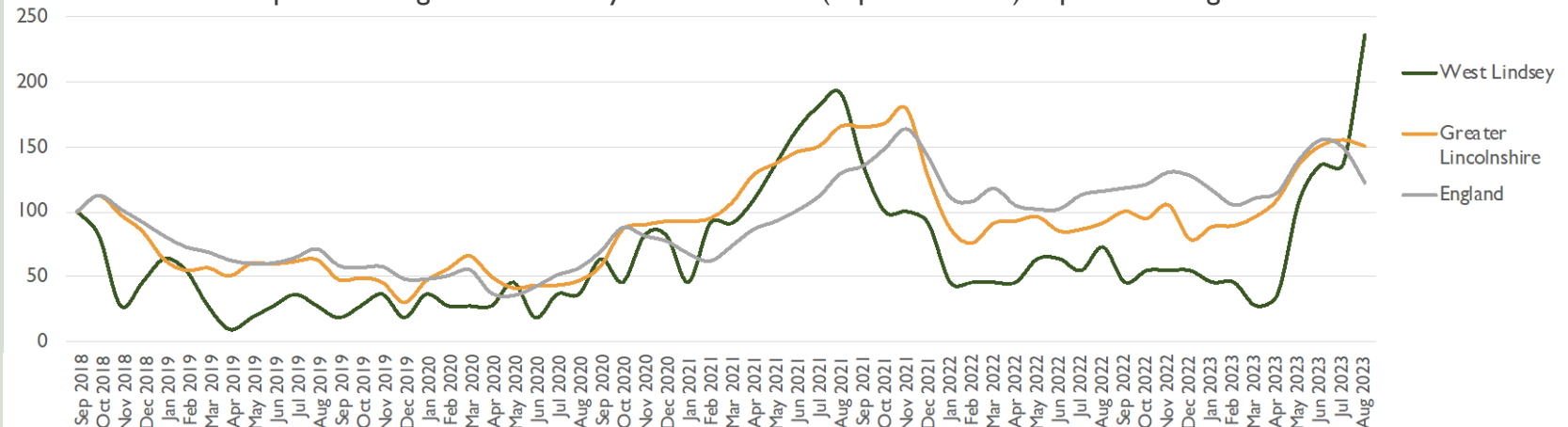
Note: This analysis uses a standard occupational classification (SOC) definition for the sector as opposed to a standard industrial classification (SIC) definition. We have used occupations that are closely aligned with the sector based on cross-referencing national-level SOC and SIC data. This creates a more inclusive and wider definition of the sector and captures more relevant vacancy data.

Source: Lightcast, under licence from Greater Lincolnshire LEP

Unique online Agri-Food vacancy numbers in West Lindsey, Sep 2018 – Aug 2023



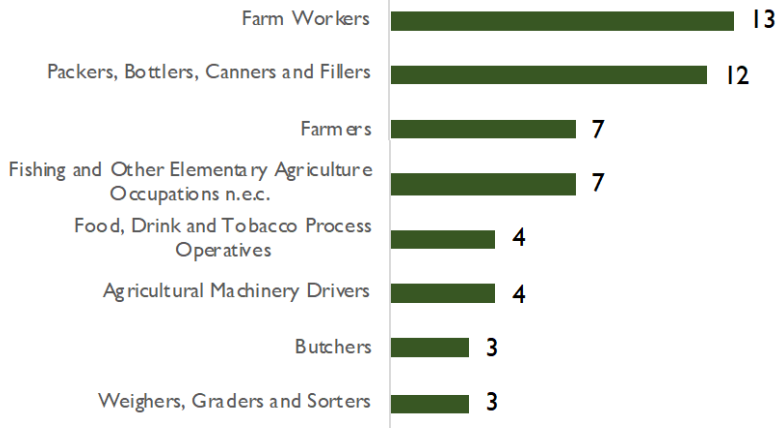
Unique online Agri-Food vacancy numbers index (Sep2018 = 100) Sep 2018 – Aug 2023 index



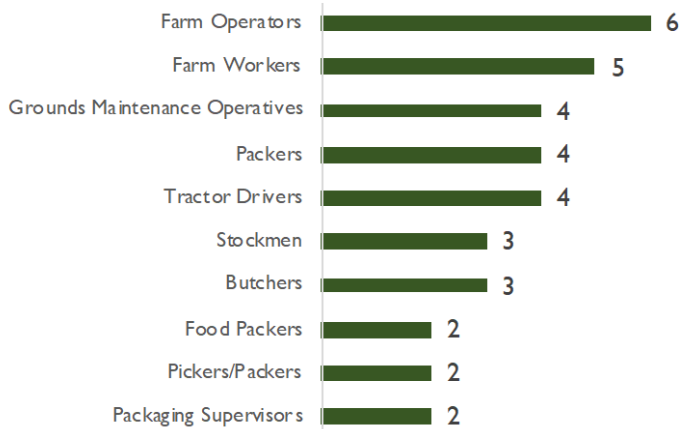
VACANCIES IN AGRIFOOD Cont.



Top occupations of West Lindsey Agri-Food vacancies posted between Sep 2022 – Aug 2023



Top job titles of West Lindsey Agri-Food vacancies posted between Sep 2022 – Aug 2023



Further details regarding the vacancies posted by Agri-Food employers during the last year show strong demand for traditional roles on farms, e.g., farm workers, farm operators, farmers, and tractor drivers. The manufacturing element of the sector also comes through strongly in terms of the need for 'Packers, Bottlers, Canners and Fillers' and 'Food, Drink, and Tobacco Process Operatives.'

Specialist skills requested in these vacancies are topped by 'Poultry' followed by 'Animal Husbandry', which suggests increased demand for this type in the area. Further down the list of specialist skills, it is interesting to note both 'Numeracy' and 'Automation' being mentioned in vacancies reasonably strongly.

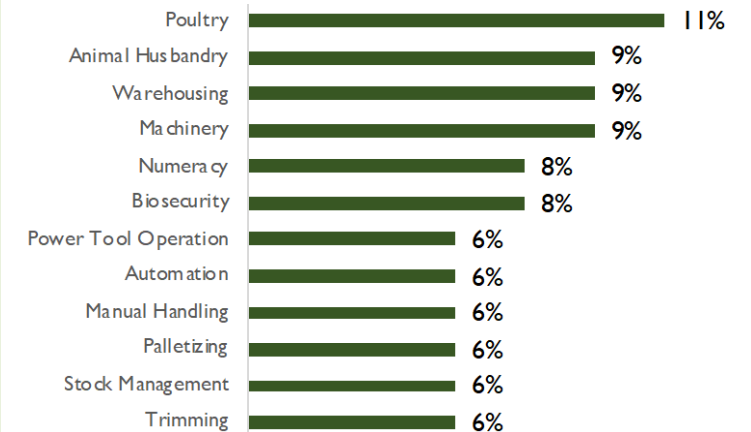
In terms of core skills, 'Management' tops the list, which could be a reflection of the older age profile of workers in this sector, with many reaching or past retirement. 'Packaging and labelling' skills also feature strongly, which ties into the food manufacturing vacancies we see appearing in strong numbers in the charts on the left.

Source: Lightcast, under licence from Greater Lincolnshire LEP

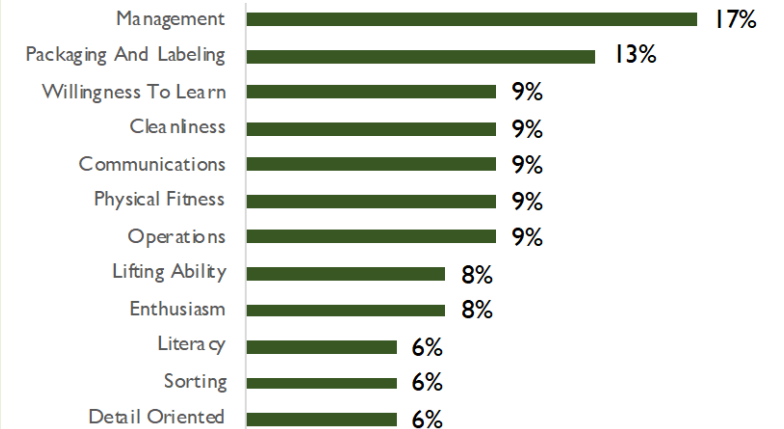
EMPLOYERS



Top specialist skills requested in West Lindsey Agri-Food vacancies posted between Sep 2022 – Aug 2023



Top core skills requested in West Lindsey Agri-Food vacancies posted between Sep 2022 – Aug 2023



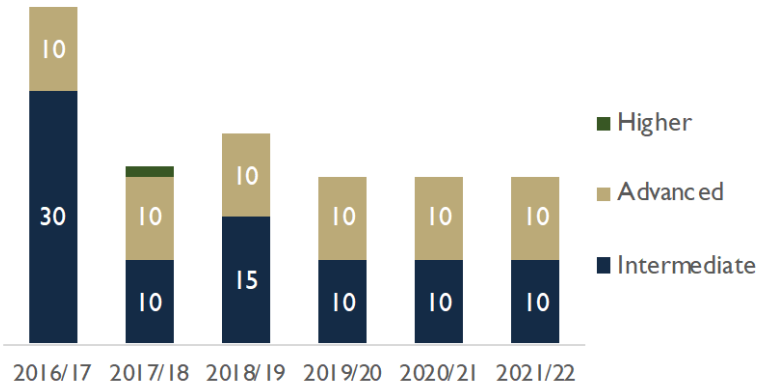
AGRI-FOOD FURTHER EDUCATION & SKILLS



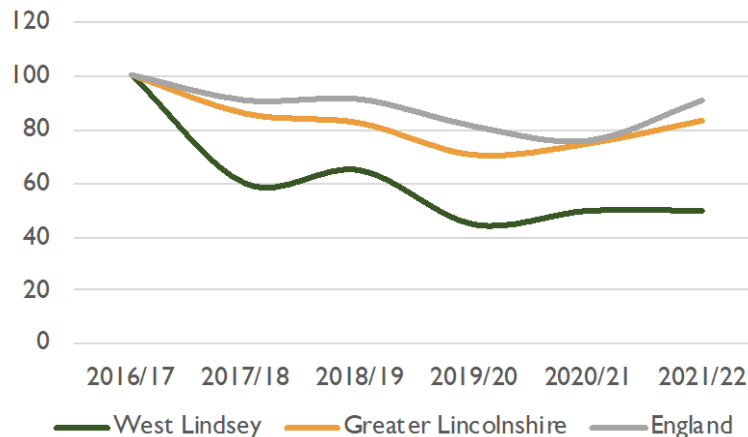
SKILLS INFRASTRUCTURE



Agriculture, Horticulture and Animal Care Apprenticeship Starts in West Lindsey



Change in Agriculture, Horticulture and Animal Care Apprenticeship Starts, 2016/17 – 2021/22 (2016/17 = 100)



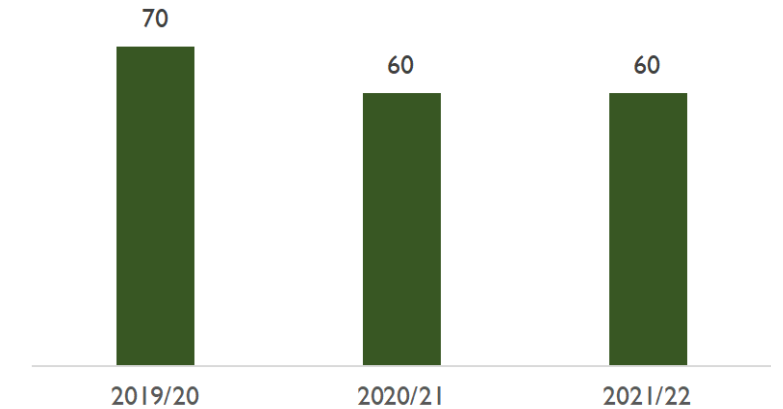
Starts in Agri-Food related Apprenticeships are low in number, given the size and importance of the sector locally, but numbers have remained pretty constant over the last five years after dropping in 2017/18. Numbers have dropped both across Greater Lincolnshire and nationally since 2016/17, but the fall has been more pronounced in West Lindsey.

Regarding Education & Training aim enrolments, then again numbers for Agri-Food related subjects have been generally constant over the years where we have comparable data. However, West Lindsey and Greater Lincolnshire have not experienced the uptick in aim enrolment numbers that occurred nationally between 2020/21 and 2021/22.

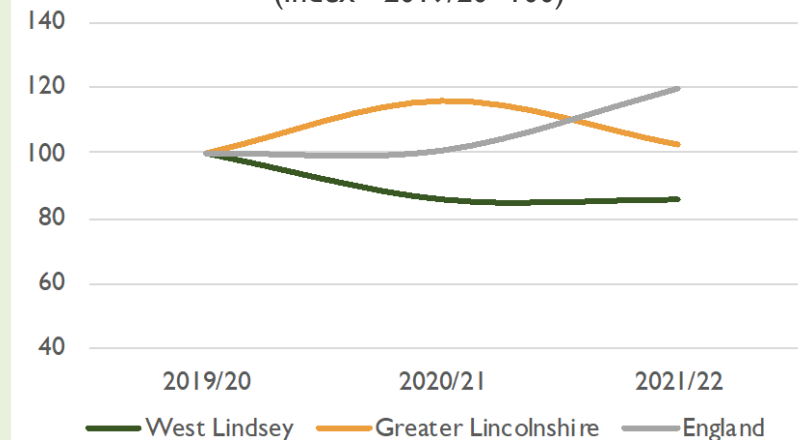
Note: Due to the lack of data on Further Education & Skills at sector subject area tier 2 we have been unable to reflect Apprenticeship starts and Education & Training aim enrolments in food manufacturing-related courses in this analysis. Instead, these are counted under the tier 1 sector subject area of 'Engineering and Manufacturing Technologies', and, as such, are covered in the Engineering and Manufacturing sector summary.

Source: Department for Education

Agriculture, Horticulture and Animal Care Education & Training Aim Enrolments in West Lindsey



Change in Agriculture, Horticulture and Animal Care Education & Training Aim Enrolments, 2019/20 – 2021/22 (Index - 2019/20=100)



ENGINEERING & MANUFACTURING



This sector summary brings together the various insights we gleaned regarding the Engineering & Manufacturing sector in West Lindsey, both from our desktop research and the various skills conversations we have conducted with employers, providers, and community groups throughout this project.

The sector definition we have used in this work, especially around measuring employment and vacancies, is that set out by the Greater Lincolnshire Local Enterprise Partnership (LEP). It captures activity across a wide range of manufacturing sub-sectors but crucially omits food and drink manufacturing, which instead sits under the Agri-Food sector.



ENGINEERING & MANUFACTURING - SUMMARY



The data tells us that:

- Total employment in the Engineering & Manufacturing sector in West Lindsey was just over 2,900 in 2022, making up 9.6% of total employment in the district.
- Employment has dropped by around 400 people since 2021 but is still higher than in 2015, unlike at Greater Lincolnshire and national level.
- Employment in Gainsborough has fallen from around 1,700 to 1,100 between 2015 and 2022, offset by increases in the 'Rural West Lindsey area.
- The sector is projected to grow by around 200 jobs with replacement demand, meaning a further 700 jobs will need filling by the end of 2023.
- Sector vacancies in West Lindsey have increased substantially since the start of 2023, with demand very much focused on higher-level / higher-qualified managerial, professional, and technician roles.
- Apprenticeship starts in Engineering and Manufacturing Technologies subjects almost halved between 2019/20 and 2020/21, whilst Education & Training aim enrolments remain below national levels.

Through our skills conversations, local stakeholders are telling us that:

- Engineering recruitment was described as very difficult currently, with long-standing vacancies in management/professional and on the shop floor regarding qualified Trades and Operatives. These challenges are evident across the whole area (including Market Rasen and Hemswell), although the concentration of engineering businesses around Gainsborough makes the situation particularly acute.
- Skills shortages are compounded by high staff turnover, which has not been mitigated by increasing pay levels.
- Entry-level apprenticeships have been reduced recently, although the impacts of the perceived 'closure' of the Made in Gainsborough initiative are difficult to quantify. Several local employers viewed it as a likely backward step towards less employer collaboration, less in-kind investment, less school engagement, and increased employer competition over staff.

Key Considerations:

- An emphasis on technical skills - upskilling as well as new talent.
- An emphasis on Level 3 'skilled trades' ahead of Level 4 and above.
- The opportunity to respond to a perceived lack of occupational provision within the district, with the greatest impact being in Gainsborough.
- Considering a strong, ambitious West Lindsey engineering cluster, there may be an opportunity to rebuild jobs and skills momentum through greater local skills collaboration.

ENGINEERING & MANUFACTURING SKILLS CONVERSATION FEEDBACK



- Engineering recruitment across the district was described as a ‘nightmare’ currently, with long-standing vacancies in management/professional and on the shopfloor in respect of qualified Trades. These challenges are evident across the whole area (including Market Rasen and Hemswell), although the concentration of engineering businesses around Gainsborough makes the situation particularly acute.
- Skills shortages are compounded by high staff turnover, which has not been mitigated by increasing pay levels.
- The balance between ‘traditional trades’ and contemporary digital, green-based engineering roles is not yet reflected locally in workforce ‘shapes’, with the highest demand remaining for practical skilled trades as suggested by national reports.
- Made in Gainsborough (MiG) quite uniquely sought to enable employer ownership and collaboration (rather than competition) between Gainsborough engineering employers with a partnership approach, raising the profile of engineering jobs and careers locally and formally establishing a local talent pipeline of young people, raising aspirations, tackling local skills gaps, and profiling Gainsborough employers offering progressive engineering careers.
- MiG no longer operates from Gainsborough since Lincoln College closed the Gainsborough campus on July 21, and, despite it being too early to analyse specific impacts, the lack of a local facility reduces options for local young people in a community not prone to commuting, and also the profile of engineering as a local career opportunity.
- In particular, employers described how MiG raised aspirations for Gainsborough by lifting the profile of local engineering employers and the careers on offer – particularly those seeking practical skill-based occupations. One employer was convinced that the likely outcome is that employers are recruiting less, and fewer Gainsborough young people will embark on engineering careers.
- Connected to the local closure of MiG, employers reflected on less employer collaboration, less in-kind investment, less school engagement, and increased employer competition over staff.



ENGINEERING & MANUFACTURING DESKTOP RESEARCH - EMPLOYERS



- “As of 2021, there were approximately 6.1 million jobs within engineering occupations across all industries, representing approximately 19% of all jobs in the UK.” (Engineering UK, May 2023)
- The Manufacturing sector reported in 2022 that it had a skills gap density of 7.5% (the proportion of its employees judged not fully proficient), up from 5.8% in 2017. (Employer Skills Survey, Department for Education)
- “25% of all job postings in the UK are for engineering roles.” (Engineering UK, May 2023)
- “Engineering occupations are projected to grow by a further 2.5% by 2030, adding 173,000 net new jobs. This represents a faster rate of growth than that projected for the national average of all occupations.” Engineering UK (May 2023).
- “Engineering - The advancement of technology and the fact that 20% of the current engineering workforce is set to retire by 2026 creates a significant skill and experience gap in engineering.” (Oxford Learning College, 2023)
- “Key engineering companies in the town (Gainsborough), which manufacture products worldwide, had said they were competing to fill vacancies and struggling to find local training.” (Burton, 2019)
- “Applicants lacking technical skills are the main challenge seen by engineering recruiters.” (IET 2021 Skills Survey-summary)
- “There is an increase in ‘green’ engineering jobs, and the trend is likely to continue. In the past 5 years postings for ‘green’ engineering jobs have increased by 55% and postings requiring ‘green skills’ by 48%.” (Engineering UK, May 2023).
- “When employers look ahead, beyond 3 years, they want mid-high level skills, to invest in digitalisation and greenification.” (MAKE UK Skills 2030)



ENGINEERING & MANUFACTURING DESKTOP RESEARCH - PEOPLE



- 'The sector is seen as low-skilled, low-paid, using heavy machinery in repetitive tasks (it is not the case, but that is the perception)' MAKE UK. (Skills 2030).
- "The majority of those who will be working in manufacturing in 2030 are already in the workforce ... employers need to upskill and retrain existing employees ... key priority over the next decade." MAKE UK (Skills 2030)
- "71% of the UK engineering workforce who are experiencing internal skills gaps say it is down to missing engineering or technical skills." (Engineering UK, based on 2021 IET Annual Skills Survey)
- "Over a quarter (27%) say the greatest skills gaps in their organisation are in high skilled roles (degree/master's levels) with more (31%) finding them in intermediate roles (A-Level, NVQ 3 Level, apprenticeships)." (IET 2021 Skills Survey – summary)
- "There has been an increase in the need for people with skills in automation, robotics, and IoT (Internet of Things), with many current experienced manufacturing workers not seeing the benefit of learning these skills." (Oxford Learning College, 2023)



ENGINEERING & MANUFACTURING DESKTOP RESEARCH – SKILLS INFRASTRUCTURE



- Many West Lindsey residents have excellent access to a diverse range of high-quality further and higher engineering courses in Lincoln and Scunthorpe, plus there are Land-based Engineering courses at Riseholme.
- The Made in Gainsborough (MiG) initiative sought to provide locally accessible engineering training for those where travel out of the district was less of a sustainable choice for financial, logistical, or cultural reasons.
- MiG enabled local engineering education and training for West Lindsey (especially but not solely Gainsborough) young people as part of a local industry collaboration through Lincoln College at its then Gainsborough campus. This Gainsborough-based partnership initiative (and the wider FE campus) was relocated to Lincoln in 2021.
- “MiG supported the relocation of practical engineering equipment to a Gainsborough campus. Businesses included A Schulman, AMP Rose, Clean Tech, Eminox, Hooton Engineering, Regal Manufacturing Ltd, Trepko and Wefco.” (Burton, 2019)
- “Twenty students have signed up to the engineering college, which includes a number of apprentices and full-time learners, ready to start their engineering careers.” – Apprentice student quote: “When I found MiG. It’s great because it is local, and I don’t have a long drive.” (Greater Lincolnshire LEP, September 2019)
- “MiG Engineering Apprenticeship Scheme run from Gainsborough College. Original target was 75 Apprenticeships over 3 years (achieved) and the extended target is to deliver 100 engineering apprenticeships over 5 years.” (The West Lindsey Economic Recovery Plan for 2021 – 2024)



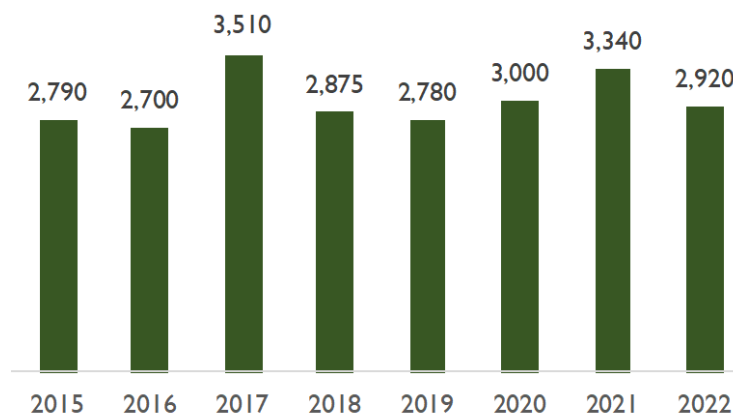
EMPLOYMENT IN ENGINEERING & MANUFACTURING



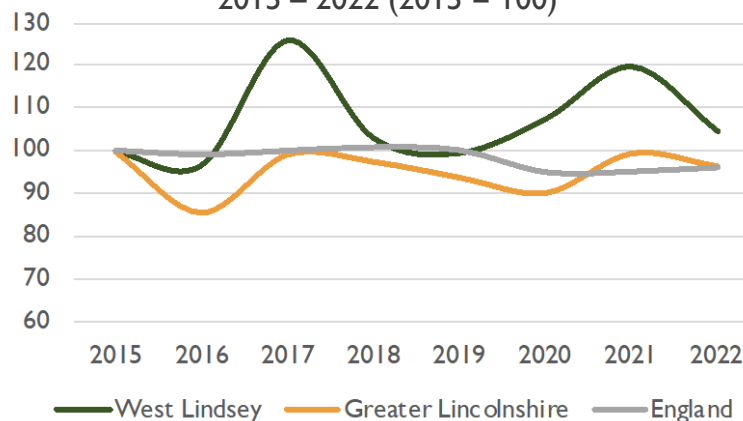
Total employment in the Engineering & Manufacturing sector in West Lindsey was just over 2,900 in 2022, making up 9.6% of total employment in the district. If we included food and drink manufacturing in our definition of the sector, then the employment number would rise to just over 3,400. Returning to our original Engineering & Manufacturing sector definition, employment has dropped by around 400 people since 2021. This is significant, but employment in the sector in West Lindsey is still higher than in 2015, which cannot be said for levels of employment in the sector at Greater Lincolnshire and national levels. In terms of where this change has taken place, employment in the sector in Gainsborough has fallen from around 1,700 to 1,100 between 2015 and 2022, whilst over the same period, it has increased from around 550 to 1,250 in the 'Rural West Lindsey area'. The sector is projected to grow by around 200 jobs over the next decade. However, the main driver of recruitment to the sector will be replacement demand (i.e., demand arising in the sector due to people leaving the workforce, mainly through retirement), with 700 jobs projected to need filling before the end of 2030.

Source: Business Register and Employment Survey, Office for National Statistics; Lightcast, under licence from Greater Lincolnshire LEP; Working Futures 2017-2027, Department for Education

Employment in Engineering & Manufacturing in West Lindsey, 2015 - 2022



Change in Engineering & Manufacturing Employment, 2015 - 2022 (2015 = 100)



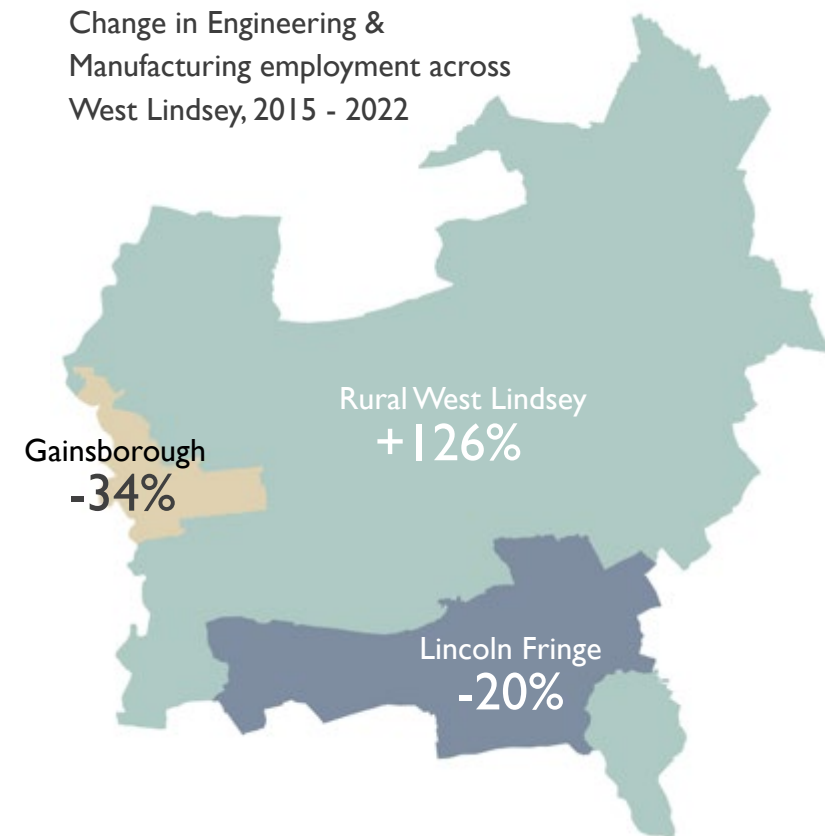
EMPLOYERS



Employment in Engineering & Manufacturing across West Lindsey, 2022



Change in Engineering & Manufacturing employment across West Lindsey, 2015 - 2022



VACANCIES IN ENGINEERING & MANUFACTURING



EMPLOYERS

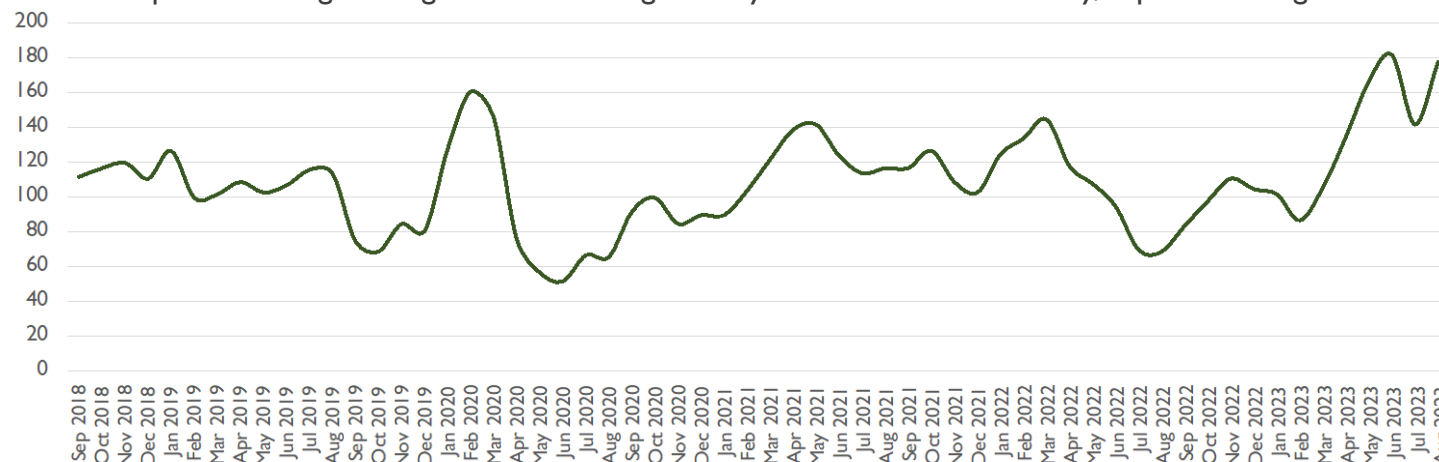


Vacancy numbers in Engineering & Manufacturing in West Lindsey have fluctuated significantly over the last five years, with a noticeable jump in numbers just prior to the beginning of the pandemic in March 2020 – a trend which is also not replicated across Greater Lincolnshire or nationally. Numbers subsequently fell back to a low point in June 2020, and then since that point, changes in vacancy numbers have broadly mirrored trends seen at Greater Lincolnshire and national levels. Demand in West Lindsey has increased substantially since the start of 2023 but is a little below Greater Lincolnshire and national levels of demand.

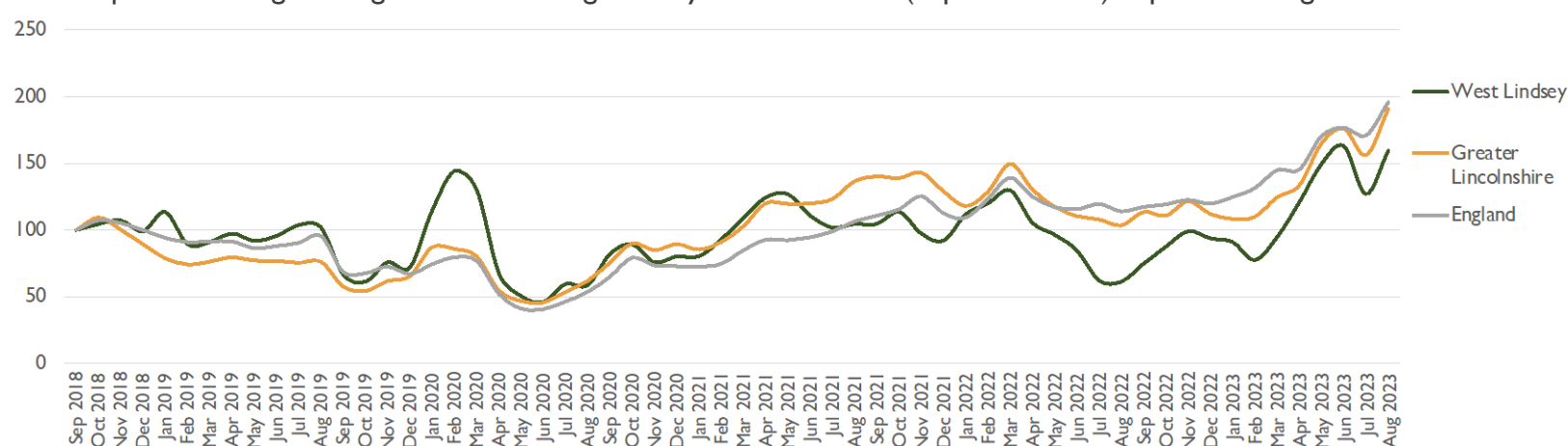
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Source: Lightcast, under licence from Greater Lincolnshire LEP

Unique online Engineering & Manufacturing vacancy numbers in West Lindsey, Sep 2018 – Aug 2023



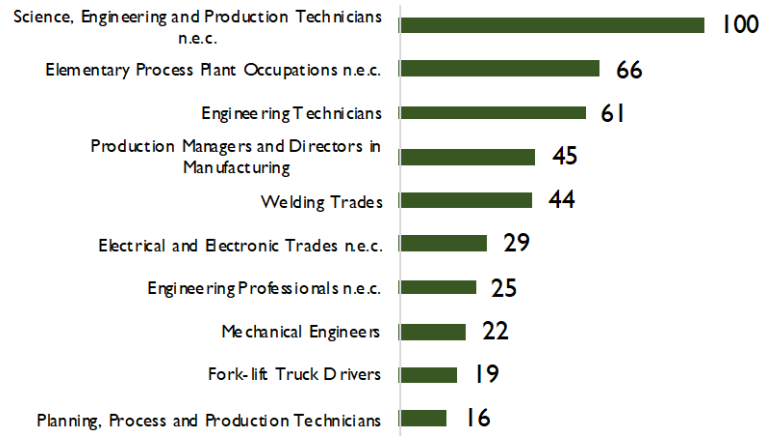
Unique online Engineering & Manufacturing vacancy numbers index (Sep2018 = 100) Sep 2018 – Aug 2023 index



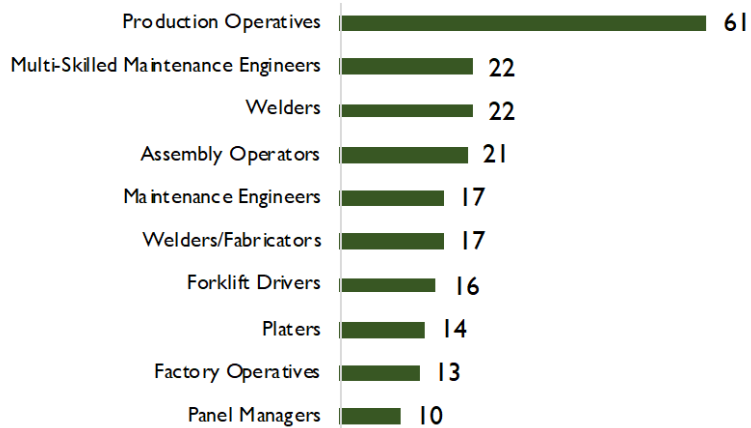
VACANCIES IN ENGINEERING & MANUFACTURING Cont.



Top occupations of West Lindsey Engineering & Manufacturing vacancies posted between Sep22 – Aug23



Top job titles of West Lindsey Engineering & Manufacturing vacancies posted between Sep22 – Aug23



Looking down the list of occupations that are appearing in Engineering and Manufacturing vacancies posted in West Lindsey over the last year, whilst 'Elementary Process Plant Occupations' (a generally lower qualified, lower-skilled role) features in the top two, the rest of the list is very much geared towards higher level / higher qualified managerial, professional, and technician roles. The fact that there is no standard classification around job titles means that many of these higher-level roles will feature in smaller numbers on the list of top job titles. Instead, it is dominated by more generic and, in some cases, entry-level roles, perhaps reflecting increased demand from employers to fill entry-level positions as older employees leave the workforce and probably cannot be replaced 'like for like.'

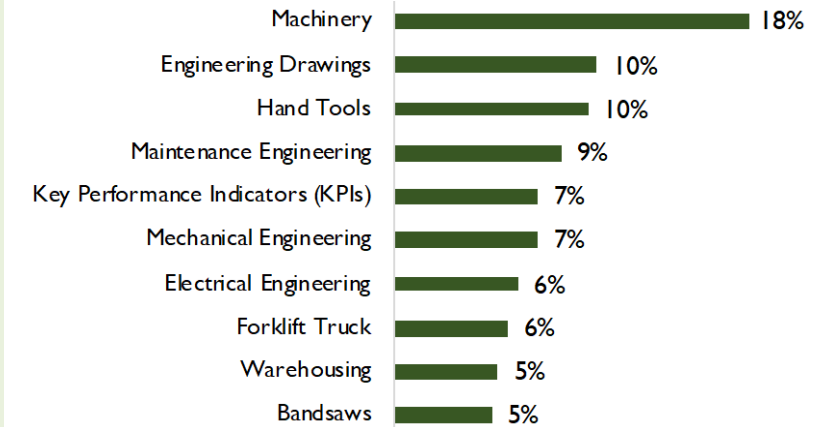
Engineering-specific skills certainly feature strongly in the top specialist skills being requested by employers. Whilst core skills are again focused on 'communications', the ability to problem solve and being detailed orientated are also key asks.

Source: Lightcast, under licence from Greater Lincolnshire LEP

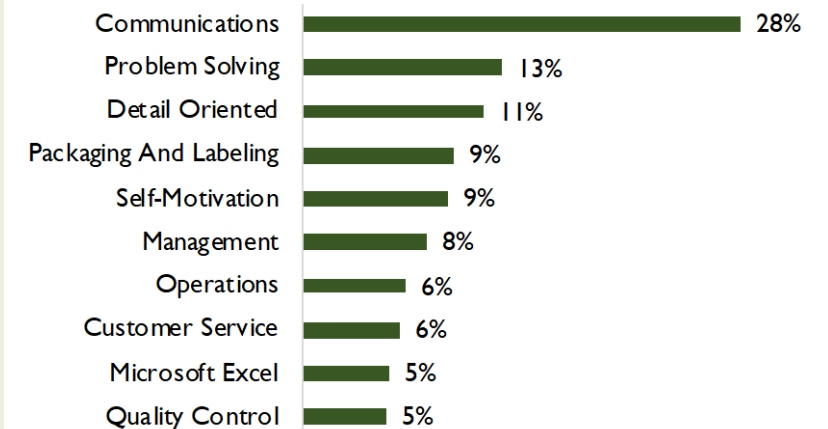
EMPLOYERS



Top specialist skills requested in West Lindsey Engineering & Manufacturing vacancies posted between Sep22 – Aug 23



Top core skills requested in West Lindsey Engineering & Manufacturing vacancies posted between Sep22 – Aug23



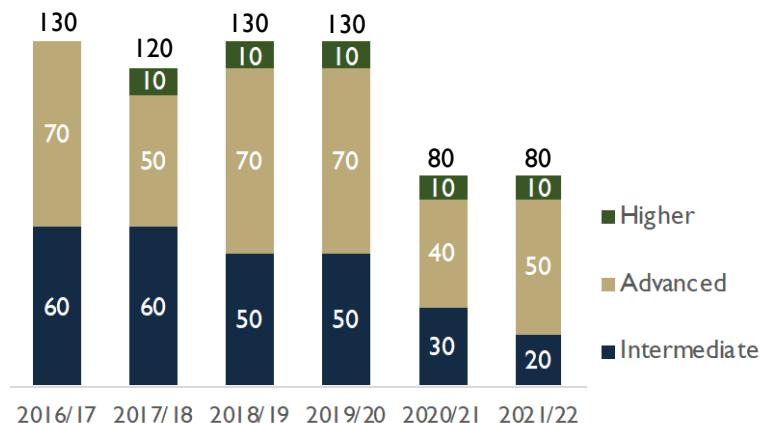
ENGINEERING & MANUFACTURING FURTHER EDUCATION & SKILLS



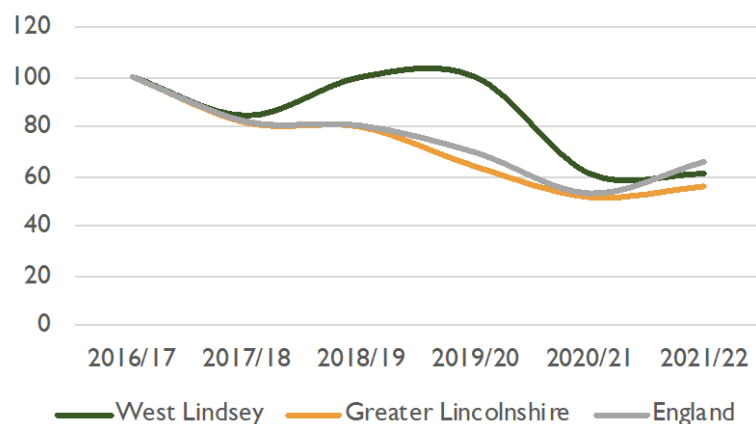
SKILLS INFRASTRUCTURE



Engineering and Manufacturing Technologies
Apprenticeship Starts in West Lindsey



Change in Engineering and Manufacturing Technologies
Apprenticeship Starts, 2016/17 – 2021/22 (2016/17 = 100)

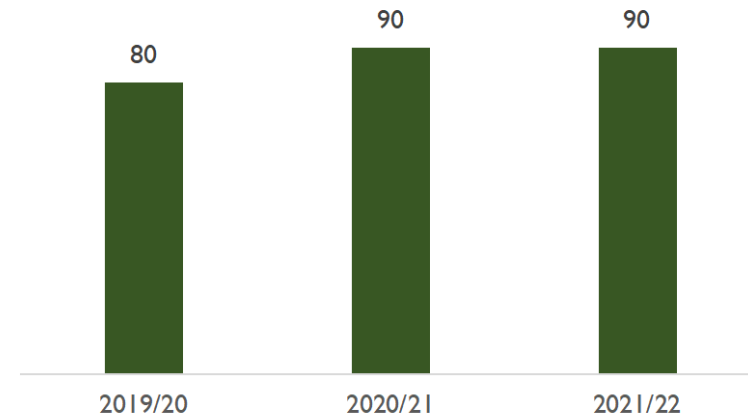


Apprenticeship starts in Engineering and Manufacturing Technologies subjects in West Lindsey were holding steady prior to 2020/21 but then dropped to 80, with starts in 2021/22 maintaining that lower level. Across Greater Lincolnshire and nationally, the longer-term trend for starts in this subject has been downward, but the latest data for 2021/22 does show a slight uptick in numbers.

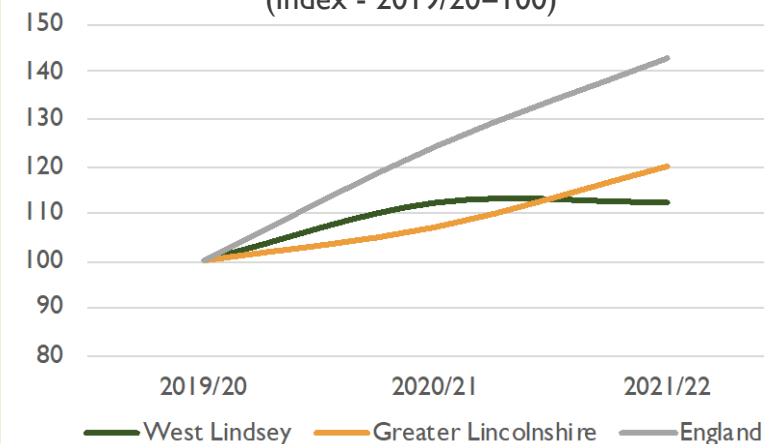
Regarding Education & Training aim enrolments in Engineering & Manufacturing Technologies subjects, numbers have increased slightly in West Lindsey over the last three years. However, we can see that growth in this subject's aim enrolments has been higher across Greater Lincolnshire, and even more so when we consider national figures.

Source: Department for Education

Engineering and Manufacturing Technologies Education &
Training Aim Enrolments in West Lindsey



Change in Engineering and Manufacturing Technologies
Education & Training Aim Enrolments 2019/20 – 2021/22
(Index - 2019/20=100)



HEALTH, CARE & WELLBEING



This sector summary combines the various insights we gleaned regarding the Health, Care & Wellbeing sector in West Lindsey, both from our desktop research and the various skills conversations we have conducted with employers, providers, and community groups throughout this project.

The sector definition we have used in this work, especially around measuring employment and vacancies, is that set out by the Greater Lincolnshire Local Enterprise Partnership (LEP). It captures activity across several sub-sectors, including:

- Hospital activities
- Nursing homes
- General Practice
- Residential Care
- Dentists
- Social work activities
- Child daycare



HEALTH, CARE & WELLBEING - SUMMARY



The data tells us that:

- The Health, Care & Wellbeing sector currently employs approximately 3,200 people in West Lindsey, 10.5% of total employment in the district.
- The sector is projected to grow by around 600 jobs between now and 2030. However, the main driver of recruitment to the sector will be replacement demand, with a further 800 jobs projected to need filling before the end of 2030.
- Sector vacancy numbers have increased significantly since late 2022 onwards, with some recent fall off, but demand remains high, particularly for workers in the care sector, with nurses and related roles also featuring strongly.
- 29% of all West Lindsey Apprenticeships starts in 2021/22 were strongly aligned with the Health, Care & Wellbeing sector, a total of 180. Numbers have increased since a historic low in 2019/20, driven by growth in starts at both advanced and higher levels.
- Education & Training aim enrolments in relevant subject areas have dropped in 2021/22 but remain high.

Through our skills conversations, local stakeholders are telling us that:

- There are particular challenges faced in recruiting and retaining registered nurses and frontline care staff, with high levels of agency staff required. Several examples of higher-skilled opportunities were cited as difficult to fill.
- FE College healthcare provision in Lincoln, Scunthorpe, and Grimsby is best connected to the South and East of the district and less so to Gainsborough, Market Rasen, and Hemswell.
- The importance of a proactive health and wellbeing neighbourhood partnership model around Gainsborough, which has also been a local 'pioneer' in social prescribing.

Key Considerations:

- Is there an opportunity for an area-based, collaborative, sector recruitment and development approach proactively combatting the risks of short-term, intensive competition between local employers?
- Is there an opportunity to make better connections between local residents (for example, those with lived experience of healthcare challenges) and jobs / longer-term career pathways?
- Can we do more to articulate and engage the range of jobs and career development opportunities in health, care, and wellbeing in local educational and community environments? For example, can we raise the visibility and take-up of Apprenticeship routes such as Nursing Associate?

HEALTH, CARE & WELLBEING SKILLS CONVERSATION FEEDBACK



- There was some stakeholder surprise at the increase in sector jobs recorded in West Lindsey and questions whether this is accounted for by short-term Covid-response positions.
- The importance of a proactive health and wellbeing community partnership model in Gainsborough with shared VCSE co-production and brokerage approaches. The Gainsborough neighbourhood is also a local 'pioneer' in social prescribing, with some early-stage programmes seeking to connect the local community better – through volunteering – with jobs and careers in the sector.
- There are particular challenges faced by local Care Homes in recruiting and retaining registered nurses and frontline care staff, with high levels of agency staff required. There was an example cited of a nursing home recently deregistered in Rural West Lindsey due to an inability to recruit and retain nurses.
- Immediate jobs and longer-term career pathways in eldercare are not attracting local people in the numbers required.
- There are also a range of incentivised vacancies for primary health professionals, which are proving difficult to fill, although this is a national issue for rural areas. Locally, West Lindsey is perhaps viewed as a less attractive work location than larger towns such as Lincoln or Scunthorpe.
- General concerns were raised about low youth aspirations – particularly around Gainsborough.
- FE College healthcare provision in Lincoln and Scunthorpe is best connected to the South and East of the district and less so to Gainsborough, Market Rasen, and Hemswell.
- Concern that national policy and its focus on functional skills attainment may preclude more young people from accessing entry-level education or training. For example, there has been a move away from Apprenticeships in Healthcare to 'Care Diplomas' funded via the Adult Education Budget (AEB). (Apprenticeships are sometimes seen by employers as offering less flexibility and more 'hurdles'. T Levels, which will replace the more accessible BTEC Level 2, have more stringent entry requirements.



HEALTH, CARE & WELLBEING DESKTOP RESEARCH - EMPLOYERS



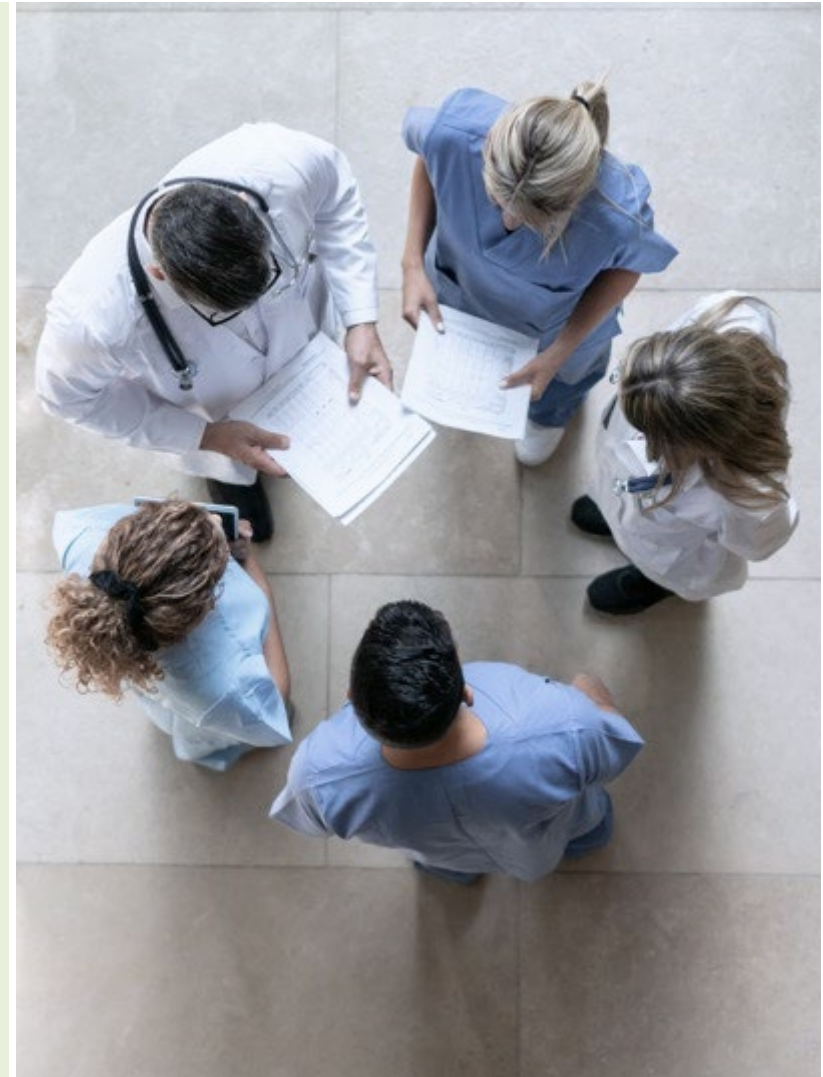
- “Pre-Covid ...health and social care associates, health professionals, and caring personal service occupations- the top three growth occupations.”(GLLEP, Local Skills Report, April 2021.)
- The Health & Social Work sector reported in 2022 that it had a skills gap density of 3.7% (the proportion of its employees judged not fully proficient), up from 3.3% in 2017. (Employer Skills Survey, Department for Education)
- “Human health and social work had the highest number of vacancies in September-November 2022 with 208,000, 3.9 vacancies for every 100 employee jobs.” (UK government, Jan. 2023)
- “The healthcare industry, including nursing, care homes, and social care services, has experienced significant labour shortages. The demand for healthcare professionals, coupled with an ageing population requiring care, has strained resources, and led to difficulties in filling positions.” (Datum RPO, July 2023).
- “In a survey by NHS Providers, NHS leaders were asked which services or professions they were most concerned about in terms of workforce shortages. Significant shortfalls in nursing staff, midwives and radiographers were mentioned most frequently. Shortages in psychiatry, community district nursing teams and ambulance call handlers were also frequently mentioned.”(Care Quality Commission, Oct 2022).
- Adult Social Care Employer Survey – June 2022 – “87% experiencing challenges to recruitment. 48% challenges to retention.”(Care Quality Commission, Oct. 2022).
- “Care homes are finding it difficult to attract and retain registered nurses. Some care homes have had to stop providing nursing care. 87% of care home providers and 88% of homecare providers told us they were experiencing recruitment challenges. Over a quarter of care homes that reported workforce pressures told us they were actively not admitting any new residents.”(Care Quality Commission, Oct. 2022).
- “The figures continue to point to long-term challenges for the social care workforce. If it grows proportionally to the projected number of people aged 65 and over in the population, the number of posts will need to increase by around 445,000 posts to around 2.23 million by 2035.” (Skills for Care, July 2023).



HEALTH, CARE & WELLBEING DESKTOP RESEARCH - PEOPLE



- “There is mounting concern about whether the NHS can motivate and retain staff it desperately needs, particularly nurses.....with the highest absolute number of NHS nurses and health visitor leavers in the year to September 2022.” (The Health Foundation, 2023)
- “You can’t recruit your way out of a retention crisis.” (Royal College of Nurses, July 2023)
- “92% of NHS Trusts had concerns about staff wellbeing, stress and burnout following the Covid-19 pandemic.” (UK Government, Dec. 2022)
- “We estimate that the staff turnover rate of directly employed adult social care sector staff was 28.3% in 2022/23.” (Skills for Care, 2023) - This compares with a UK average across all employment sectors of 15%.
- “One in 40 people working in health and social work have arrived in the UK since 2021. Work visas issued since January 2021 have been predominantly driven by ‘skilled workers in health and care’... with health and care now accounting for over half of all applications...32% of employers in healthcare hire migrant workers...” (CIPD – May 2023).
- “Early evidence suggests the turnover rate for international recruits was around half that of people recruited from within the UK.” (Skills for Care, July 2023)
- “We will need to upskill our workforce to maximise the opportunities from technological and digital innovations, and embed new and different ways of working. Successfully harnessing technological advances will require staff to work in fundamentally different ways, and will necessitate the growth of specialist digital, technology and genomics roles.” (NHS, June 2023)



HEALTH, CARE & WELLBEING DESKTOP RESEARCH – SKILLS INFRASTRUCTURE



- Extremely limited health and social care education/training pathways available within West Lindsey (and even less since the closure of the Gainsborough campus of Lincoln College); although many, if not all, residents have good access to entry-level and higher provision in Lincoln, Grimsby, and Scunthorpe.
- ACIS (Including Riverside Training and CLIP) acts as a community education and training lead across most of West Lindsey, with some post-16 and Adult learning offers, although this is not comprehensive across local in-demand vacancies and possibly challenged by post-16 policy and funding developments.
- Reference to “the significant expansion of contemporary occupations such as Care Co-ordinators, Health and Wellbeing Coaches, Social Prescribing Link Workers and Peer Support Workers “(NHS, June 2023) – potentially community-based opportunities for local people without substantial sector experience? (NHS, June 2023).



EMPLOYMENT IN HEALTH, CARE & WELLBEING



EMPLOYERS



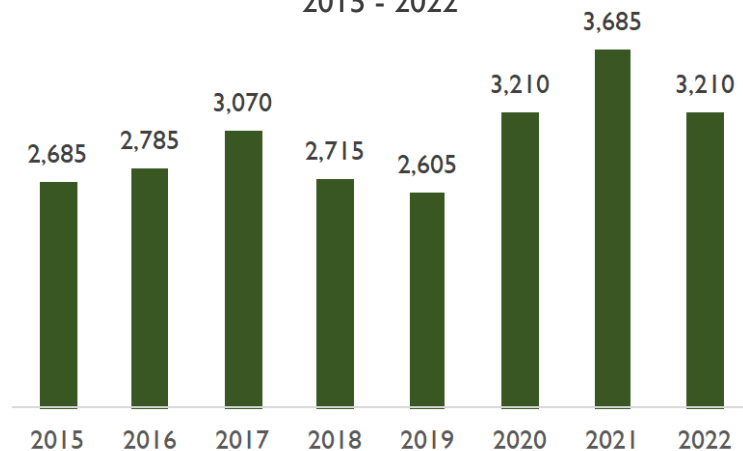
The Health, Care & Wellbeing sector currently employs approximately 3,200 people in West Lindsey, 10.5% of total employment in the district. Half of employment in the sector is sited in the 'Rural West Lindsey' area.

Employment levels in the sector peaked in 2021 at nearly 3,700, driven by growth in employment in 'hospital activities' and then fell back to just over 3,200 in 2022. Our initial view was that this was a result of the set-up and subsequent closure of the Covid testing site at the Lincolnshire Showground during the pandemic, but this theory is not borne out in changes in employment in the 'Lincoln Fringe' area (where the showground is situated). However, where the level of employment currently sits is consistent with the long-term trends in growth seen at both Greater Lincolnshire and national levels.

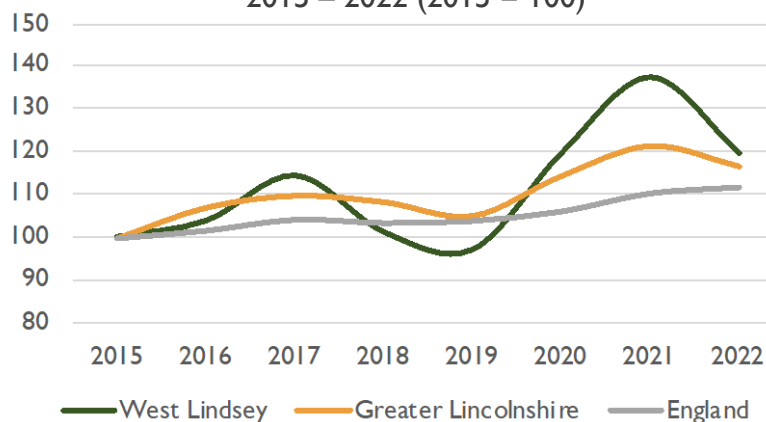
Looking ahead, the sector is projected to grow by around 600 jobs. However, the main driver of recruitment to the sector will be replacement demand (i.e., demand arising in the sector due to people leaving the workforce, mainly through retirement), with 800 jobs projected to need filling before the end of 2030.

Source: Business Register and Employment Survey, Office for National Statistics; Lightcast, under licence from Greater Lincolnshire LEP; Working Futures 2017-2027, Department for Education

Employment in Health, Care & Wellbeing in West Lindsey, 2015 - 2022



Change in Health, Care & Wellbeing Employment, 2015 - 2022 (2015 = 100)



Health, Care & Wellbeing employment across West Lindsey, 2022



Change in Health, Care & Wellbeing employment across West Lindsey, 2015 - 2022



VACANCIES IN HEALTH, CARE & WELLBEING



EMPLOYERS

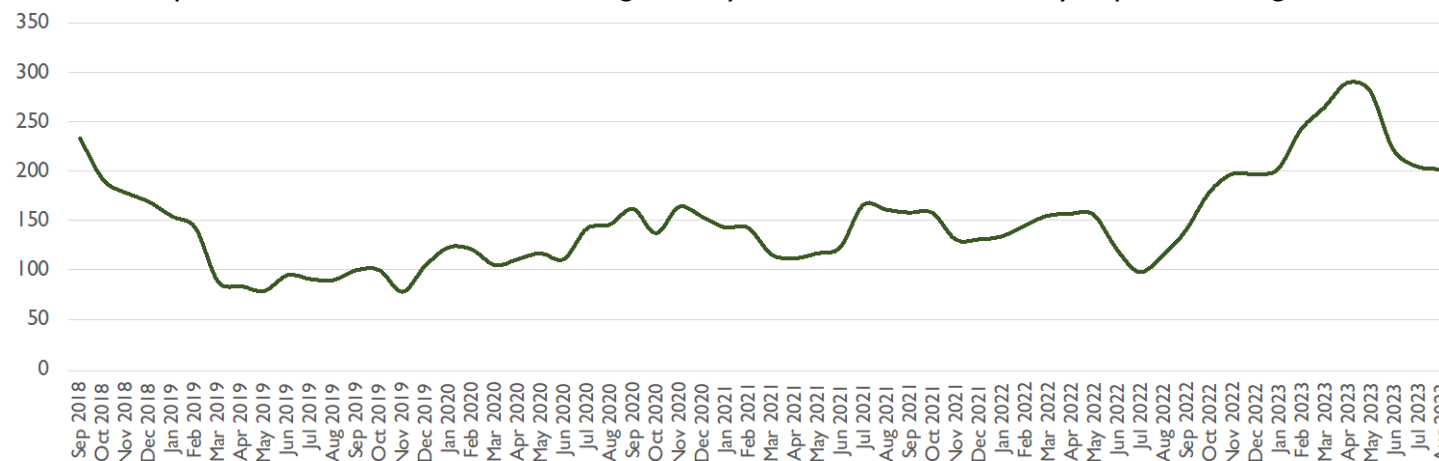


Vacancies in the Health, Care & Wellbeing sector since 2019 have generally been in the region of 100-150 per month in West Lindsey, even during the high levels of demand and tight labour market of 2021 when many other sectors were under significant pressure in terms of recruitment. Despite this, we can still see an increase in demand from late 2022 onwards, with unique online vacancy numbers peaking around April 2023 at just under 300, with numbers falling back to around 200 in the latest months. This recent upward trend in demand can be seen across Greater Lincolnshire and nationally though levels are higher. This is probably due to the lack of significant hospital facilities across West Lindsey.

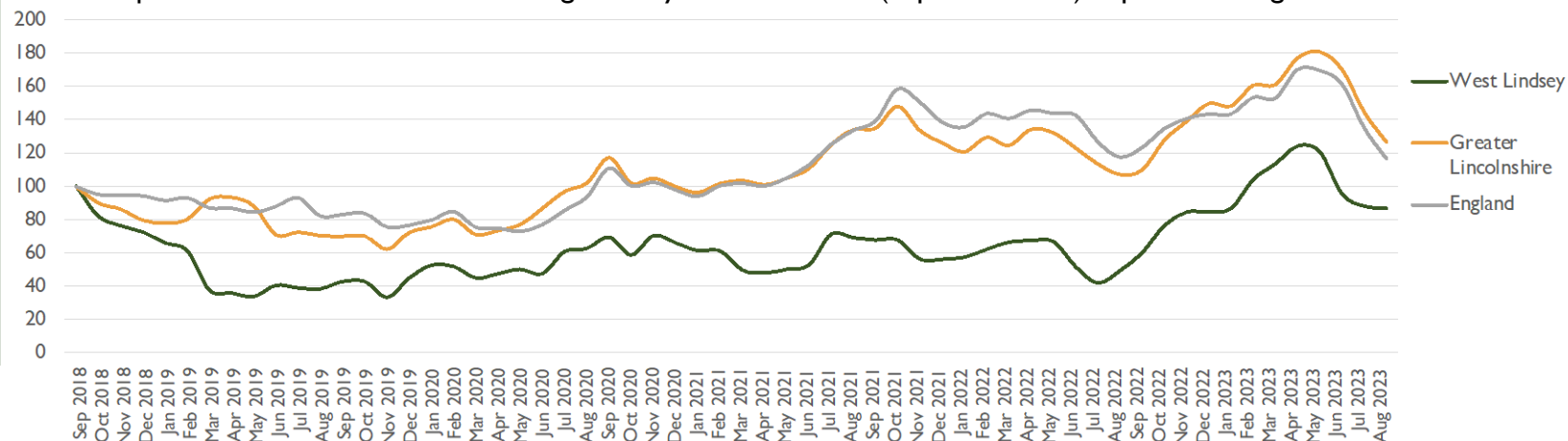
Note: This analysis uses a standard occupational classification (SOC) definition for the sector as opposed to a standard industrial classification (SIC) definition. We have used occupations that are closely aligned with the sector based on cross-referencing national-level SOC and SIC data. This creates a more inclusive and wider sector definition and captures more relevant vacancy data.

Source: Lightcast, under licence from Greater Lincolnshire LEP

Unique online Health, Care & Wellbeing vacancy numbers in West Lindsey, Sep 2018 – Aug 2023



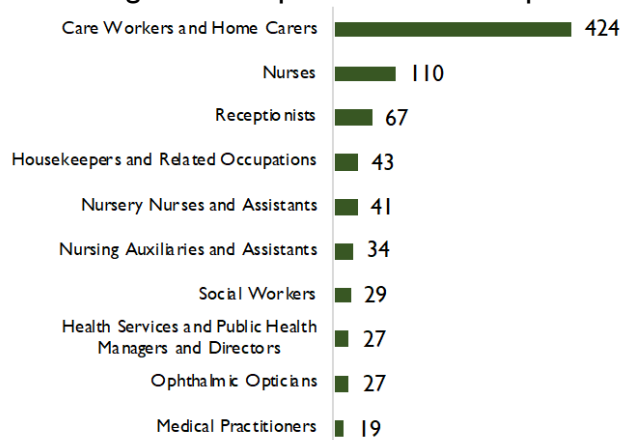
Unique online Health, Care & Wellbeing vacancy numbers index (Sep 2018 = 100) Sep 2018 – Aug 2023 index



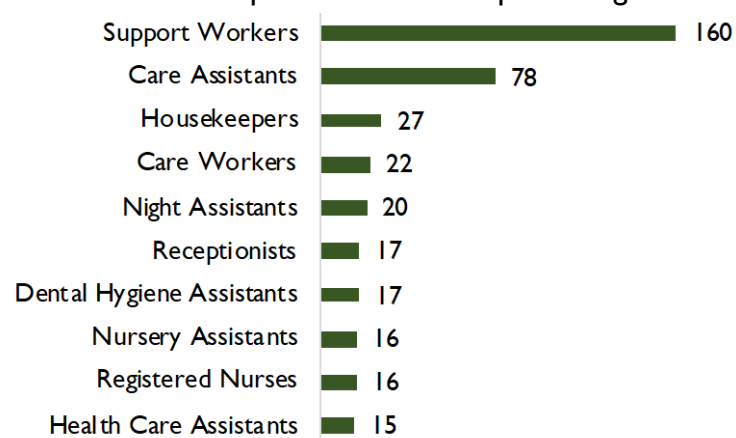
VACANCIES IN HEALTH, CARE & WELLBEING Cont.



Top occupations of West Lindsey Health, Care & Wellbeing vacancies posted between Sep22 – Aug23



Top job titles of West Lindsey Health, Care & Wellbeing vacancies posted between Sep22 – Aug23



The occupations and job titles detailed in the Health, Care & Wellbeing sector vacancies posted during the last year clearly show a high level of demand for workers in the care sector. Nursing and related roles also feature strongly but to a much lesser extent. We also note that there has been a high level of demand for roles that will require higher levels of qualifications and experience, such as 'Health Services and Public Health Managers and Directors' and 'Medical Practitioners'.

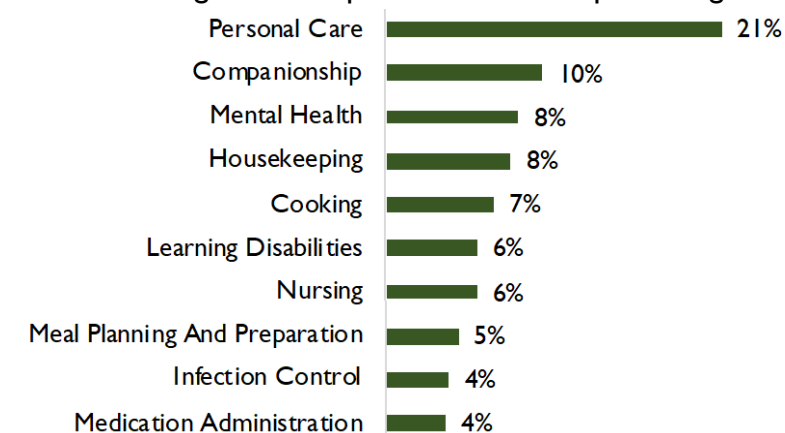
In terms of the required skills listed in these vacancies, then unsurprisingly, care-related skills are currently top with 'personal care' and 'companionship'. If we consider 'core skills', then 'communications' features very strongly (again unsurprising for a sector which is very much people/patient focused), but we can also see skills in demand which would be required in higher level jobs such as 'management', 'training and development', and 'planning'.

Source: Lightcast, under licence from Greater Lincolnshire LEP

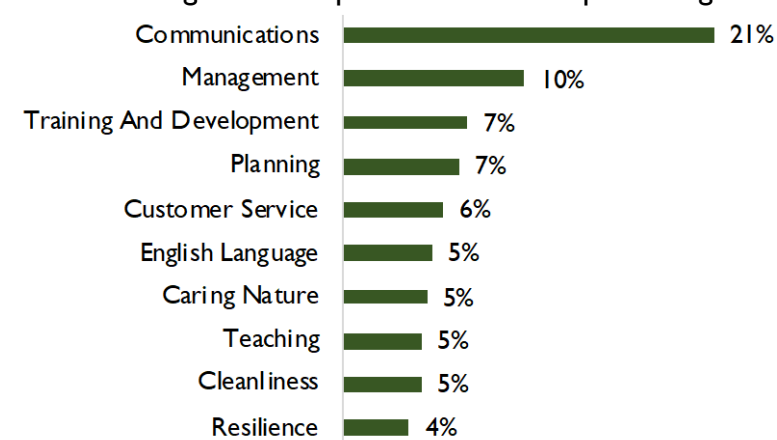
EMPLOYERS



Top specialist skills requested in West Lindsey Health, Care & Wellbeing vacancies posted between Sep22 – Aug 23



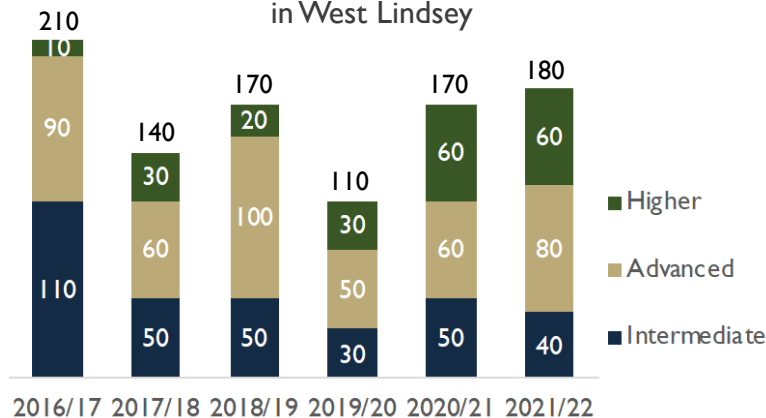
Top core skills requested in West Lindsey Health, Care & Wellbeing vacancies posted between Sep22 – Aug23



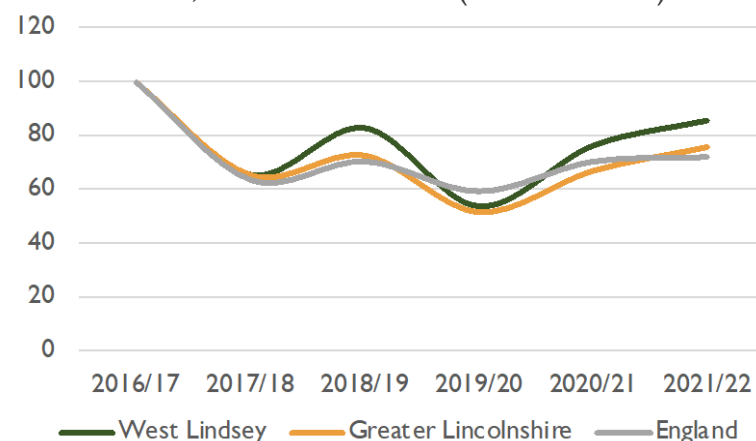
HEALTH, CARE & WELLBEING FURTHER EDUCATION & SKILLS



Health, Public Services and Care Apprenticeship Starts
in West Lindsey



Change in Health, Public Services and Care Apprenticeship
Starts, 2016/17 – 2021/22 (2016/17 = 100)



29% of all West Lindsey Apprenticeships starts in 2021/22 were strongly aligned with the Health, Care & Wellbeing sector, a total of 180. Numbers have increased since a historic low in 2019/20, driven by growth in starts at both advanced and higher levels. This recent growth in starts has been above Greater Lincolnshire and national rates.

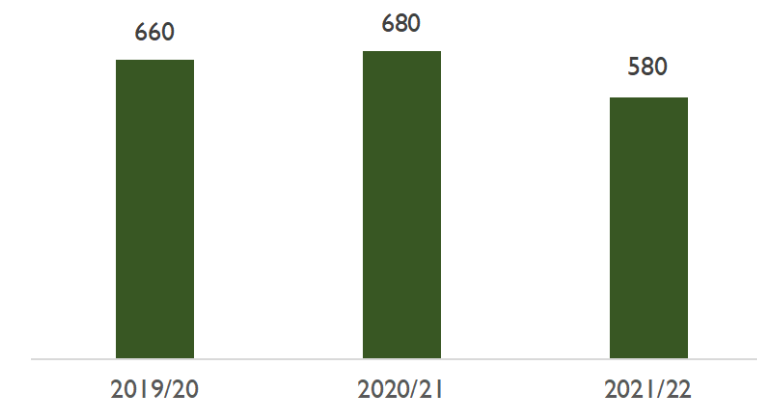
Regarding Education & Training aim enrolments in the subject area of 'Health, Public Services, and Care,' the numbers in West Lindsey in 2021/22 have dropped to 580, down from 680 in the previous academic year. Whilst we can see this trend across Greater Lincolnshire and national aim enrolment numbers for the sector, the drop has been much more pronounced in West Lindsey.

Source: Department for Education

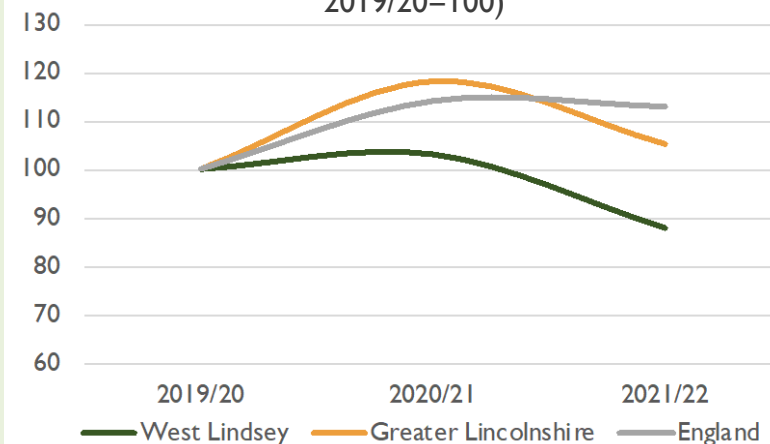
SKILLS INFRASTRUCTURE



Health, Public Services and Care Education & Training Aim
Enrolments in West Lindsey



Change in Health, Public Services and Care Education &
Training Aim Enrolments 2019/20 – 2021/22 (Index -
2019/20=100)



VISITOR ECONOMY



This sector summary brings together the various insights we gleaned regarding the Visitor Economy sector in West Lindsey, both from our desktop research and the various skills conversations we have conducted with employers, providers, and community groups throughout this project. Due to its close connections, we have also included feedback from the often-allied retail sector.

The sector definition we have used in this work, especially around measuring employment and vacancies, is that set out by the Greater Lincolnshire Local Enterprise Partnership (LEP). It captures activity across several sub-sectors, including:

- Hotels
- Restaurants
- Pubs / Bars / Clubs
- Performing Arts
- Sports and leisure facilities
- Amusement and recreation facilities
- Conference and exhibition sites
- Non-scheduled passenger transport



VISITOR ECONOMY – SUMMARY



The data tells us that:

- The Visitor Economy sector currently employs approximately 3,150 people in West Lindsey, which is 10.3% of the total employment in the district.
- Growth in sector employment since 2015 stands at 14%, in line with the national rate but below the Greater Lincolnshire growth rate of 18%.
- Looking ahead over the rest of the decade, the sector is projected to maintain employment at current levels, but it will still be required to recruit due to replacement demand, with 600 jobs projected to need filling.
- Since the start of 2023, demand from the sector has soared, with vacancies posted dominated by the need for cleaning and kitchen staff.
- Trends in Apprenticeship starts in West Lindsey in subject areas closely aligned with the Visitor Economy align with Greater Lincolnshire and national trends, with the latest numbers showing 80 starts in 2021/22, up from a low of 50 in 2020/21. Enrolments in Education & Training subject 'aims' closely aligned with the Visitor Economy are higher but remain low.

Through our skills conversations, local stakeholders are telling us that:

- Post-covid, recruiting in the visitor economy sector has gotten harder with a greater reluctance to work unsociable hours: employment with retail chains is often better paid with more regular, flexible hours.
- It is difficult for rurally-based visitor economy and retail operations to compete with jobs in larger settlements due to the lack of local labour, wage levels, and the additional costs (£/time) of travel to work. Public transport networks rarely align well with work-commuting requirements in rural areas.
- Sixth form, FE, and university students (on a 2/3 year cycle) play a vital part in the workforce for hospitality businesses with accessible locations. By definition, people are, therefore, less invested in the job role or a longer-term career.

Key Considerations:

- Is there an opportunity to articulate and inspire residents about career opportunities within the local visitor economy in areas such as events and hospitality?
- Can local public transport become better aligned with the needs of residents and employers in rural areas to access jobs and progress careers?

VISITOR ECONOMY SKILLS CONVERSATIONS FEEDBACK



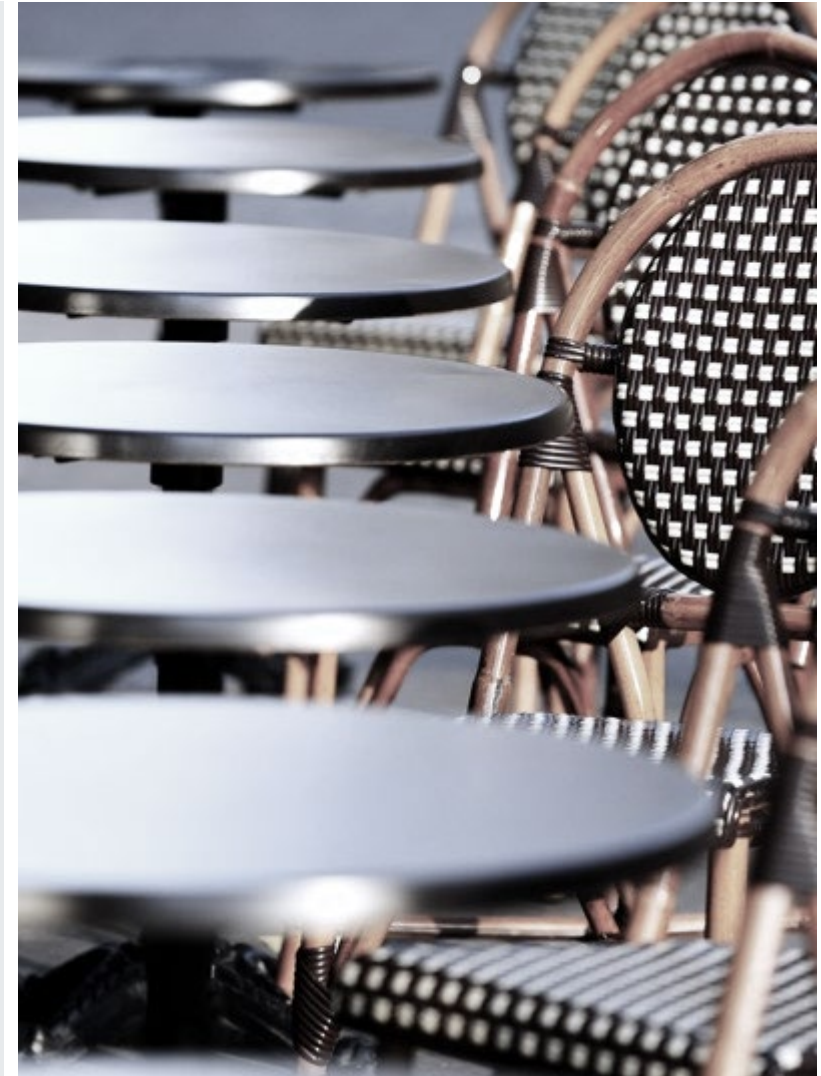
- It is difficult for rurally-based visitor economy and retail operations to compete with jobs in larger settlements due to wage levels and the additional costs (£/time) of travel to work. These additional travel costs have provided an even greater disincentive in light of the current cost of living challenges.
- Public transport networks rarely align well with work-commuting requirements in rural areas. (Almost all the staff for rurally-based employers are car-users).
- Post-covid, recruiting in the visitor economy sector has gotten harder with a greater reluctance to work unsociable hours: employment with retail chains is often better paid with more regular, flexible hours.
- The events sector has been particularly hard-hit post-covid with events teams often imported from further afield to cover local skills shortages. There is also a lack of basic hospitality skills in the sector in areas such as bar work.
- Apprenticeship participation has reduced post-covid without the management resources available to support Apprentices, plus challenges recruiting applicants to the sector.
- A recognition though of the importance of partnerships with schools and colleges.
- Sixth form, FE, and university students (on a 2/3 year cycle) play a vital part in the workforce for hospitality businesses with accessible locations. By definition, people are, therefore, less invested in the job role or a longer-term career.
- Staff retention levels are relatively positive in Gainsborough compared to the other locations of a multi-site business trading across three counties.
- Quite different retail environments across West Lindsey regarding local customer bases – for example, differences between Gainsborough and Market Rasen/Caistor.
- Retail skills gaps amongst business owners and their staff include: basic and advanced digital and IT skills; marketing; data management, and leadership.
- High staff turnover locally in Hair and Beauty salons, including Apprenticeships.
- Entry-level recruitment for the sectors tends to be based on personality rather than educational attainment.
- Small retail businesses struggle to compete on pay levels with large supermarkets and sectors such as Healthcare and Warehousing.



VISITOR ECONOMY DESKTOP RESEARCH - EMPLOYERS



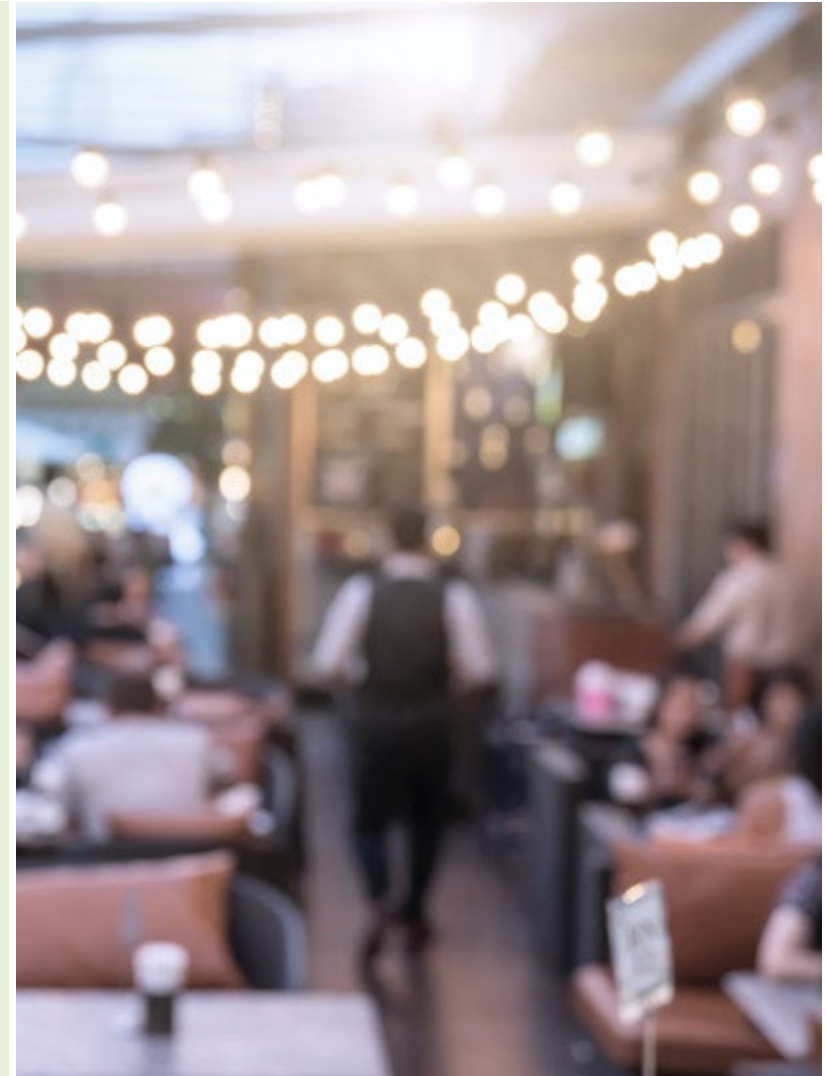
- “Tourism industry represents 10 per cent of all UK businesses and 9.5 per cent of the UK workforce, the overriding characteristic of the sector is that it is composed largely of very small businesses that are less likely to engage in training.” (Local Government Association)
- The Hotels & Restaurants sector reported in 2022 that it had a skills gap density of 8.6% (the proportion of its employees judged not fully proficient), up from 6.7% in 2017. Furthermore, the Arts & Other Services sector reported an increase in its skills gap to 5.2%, up from 3.9%. (Employer Skills Survey, Department for Education)
- “The visitor economy sector has the highest proportion of hard-to-fill vacancies, and greater growth in the number of monthly job postings, than any other sector of the economy.” (Local Government Association).
- “The labour market was substantially impacted by the pandemic, and shortages remain due to the demand for labour recovering faster than supply; accommodation and food services are disproportionately affected.” (UK Government, Tourism Recovery Partnership).
- “130,000 vacancies in Travel and Tourism threaten UK economic recovery. Restaurants and hotels are struggling to find staff – hotel staff unfilled vacancies 18% (one in six), entertainment 12% (one in eight).” (WTTC, August 2022).
- “In the retail sector – ill health, in those out of work; plus people permanently retiring, plus Brexit, where the pool of labour has shrunk – is contributing to labour shortages.” (BRC, Dec.2022).
- “The Thriving Gainsborough 2024 initiative including the £17.57m Levelling-Up funding support provides opportunities to enhance the appeal of Gainsborough as a visitor destination building on the retail offer (Marshall’s Yard) and the 500-year-old Gainsborough Old Hall. The Lincolnshire Showground is an important asset, attracting large numbers of visitors at certain times of the year. The development of a new masterplan needs to ensure that tourism opportunities are maximised including visitor accommodation, enhanced conference facilities and augmenting the range of events leading to increased overnight stays”. (West Lindsey District Council, June 2022).
- “The decommissioning of RAF Scampton provides an opportunity to enhance the heritage assets in recognition of the important role RAF Scampton has played both in military and social history.” (West Lindsey District Council, June 2022).



VISITOR ECONOMY DESKTOP RESEARCH - PEOPLE



- “They estimate a shortfall of ... 103,000 EU-origin workers in wholesale and retail. Losses in relative terms are estimated to be higher in accommodation and food, with 4% of EU-origin workers lost (67,000) ... hospitality is the worst hit, from 15% of the workforce made up of EU nationals to 9.4% in the latest data. This has only been mildly offset by the increased level of Asian nationals working in the sector...the average hours worked by EU nationals are higher than UK nationals ...in hospitality, where for every four EU national workers in hospitality, you would need more than five UK national workers to take their place to have the same number of total hours worked a week.” (CIPD - May 2023).
- “In rural areas, getting to employment and training is often one of the most significant barriers for local residents, including transport at unsocial hours and cost implications. Employment in the sector in rural areas is often seasonal, temporary, or part-time due to the business base in most rural areas, and distance means there is a limited labour pool within easy reach.” (Local Government Association).
- “Many people entering retail jobs lack digital skills because they’ve never been taught or are nervous about technology. Digital skills are now needed for 79% of retail jobs, but 62% of leaders say they can’t find people with the right experience.” (British Retail Consortium, May 2022).
- “Several industry representatives and employers voiced concerns that young people considered tourism and hospitality as a short-term job rather than a career” (Local Government Association).



VISITOR ECONOMY DESKTOP RESEARCH – SKILLS INFRASTRUCTURE



- Extremely limited sector-based training pathways available within West Lindsey (and even less since the closure of the Gainsborough campus of Lincoln College), although many, if not all, residents have good access to provision in Lincoln, Grimsby, and Scunthorpe.
- The focus for most employers recruiting for entry-level positions is focused on basic 'employability' in a customer service context.



EMPLOYMENT IN THE VISITOR ECONOMY



EMPLOYERS



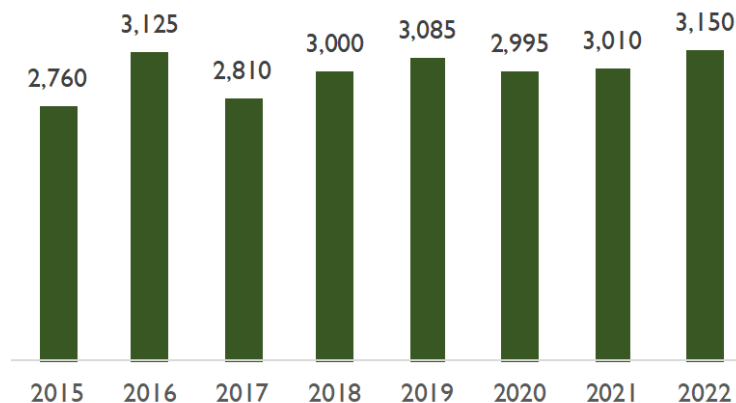
The Visitor Economy sector currently employs approximately 3,150 people in West Lindsey, which is 10.3% of the total employment in the district. Nearly half (49%) of employment in the sector is in the 'Rural West Lindsey' area.

Barring the 2016 increase in employment in (a trend that can be seen across Greater Lincolnshire), the level of employment in the sector has more or less steadily increased over time and is broadly in line with Greater Lincolnshire and national growth trends. Growth in employment overall since 2015 stands at 14%, in line with the national rate but below the Greater Lincolnshire growth rate of 18%. This employment growth can also be seen across all three of our sub-district geographies.

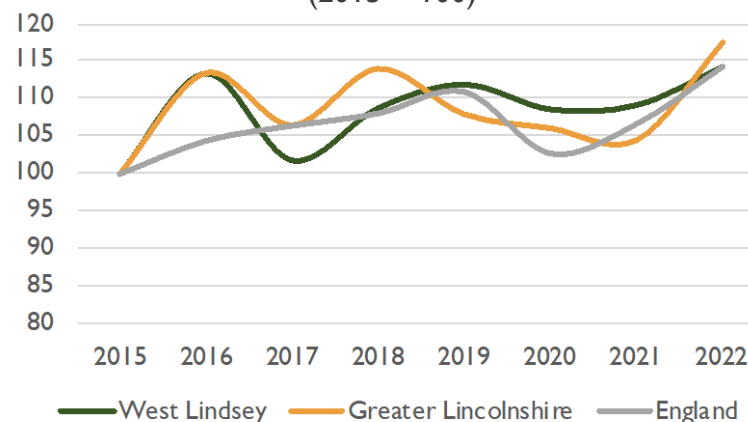
Looking ahead, the sector is projected to maintain employment at current levels though recent growth suggests this may be a pessimistic view. However, the sector will still be required to recruit due to replacement demand (i.e., demand arising in the sector due to people leaving the workforce, mainly through retirement), with 600 jobs projected to need filling before the end of 2030.

Source: Business Register and Employment Survey, Office for National Statistics; Lightcast, under licence from Greater Lincolnshire LEP; Working Futures 2017-2027, Department for Education

Visitor Economy employment in West Lindsey, 2015 - 2022



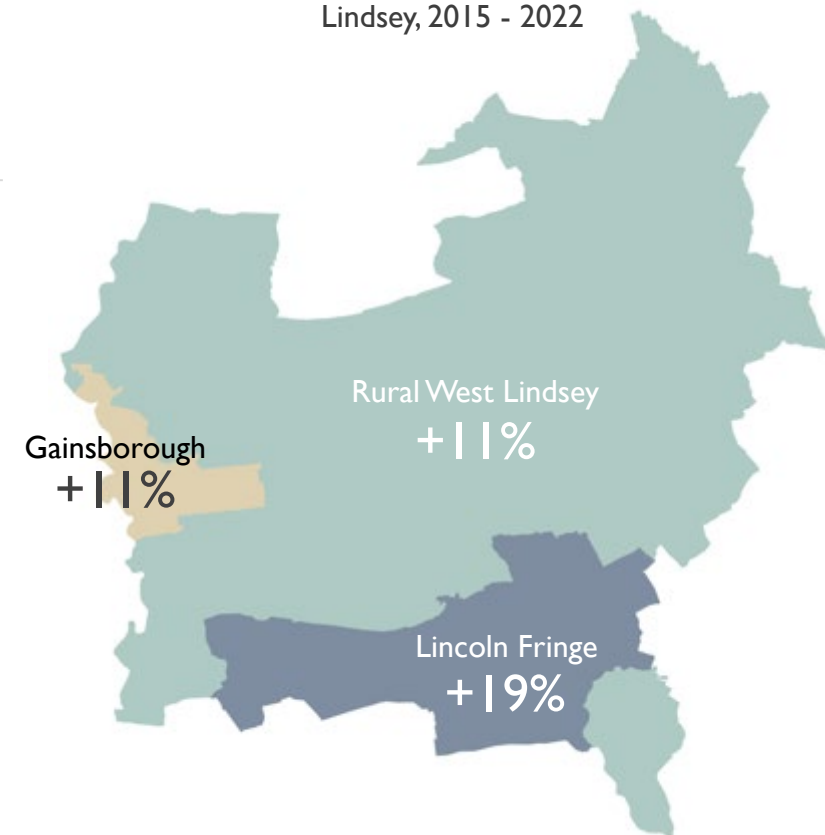
Change in Visitor Economy employment, 2015 – 2022
(2015 = 100)



Visitor Economy employment across West Lindsey, 2022



Change in Visitor Economy employment across West Lindsey, 2015 - 2022



VACANCIES IN THE VISITOR ECONOMY



EMPLOYERS

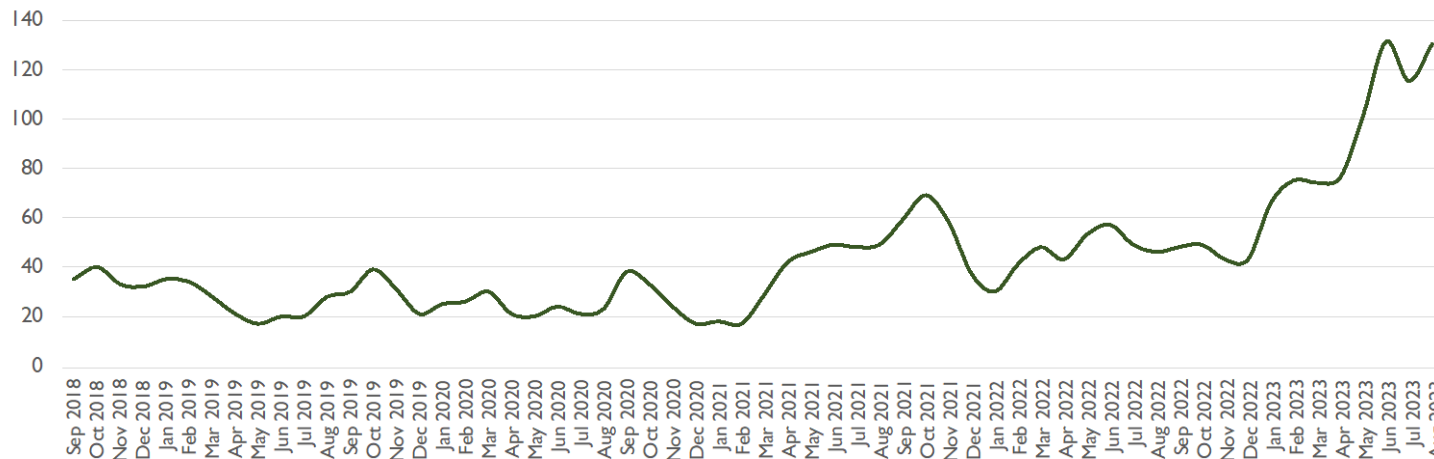


Looking back over the past five years' worth of vacancy data for the sector, vacancy numbers overall look low for a sector of this size. Between 2018 and 2021, vacancies averaged around 30 per month. This changed in 2021 with the ending of lockdowns and the opening up of the economy, which subsequently saw a big increase in demand from a sector that had been hit harder than most by the pandemic. 2022 saw vacancy numbers now average around 50 per month, but since the start of 2023, demand from the sector has soared. Referring to the bottom graph, we can see that this current level of demand from the Visitor Economy sector in West Lindsey is above that experienced across Greater Lincolnshire and nationally.

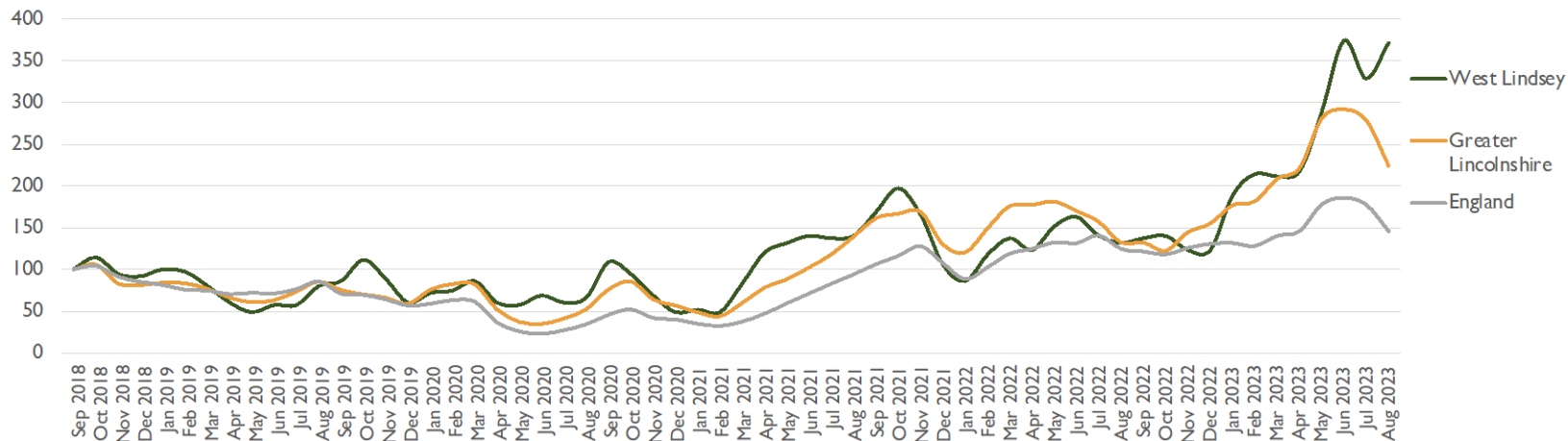
Note: This analysis uses a standard occupational classification (SOC) definition for the sector as opposed to a standard industrial classification (SIC) definition. We have used occupations that are closely aligned with the sector based on cross-referencing national-level SOC and SIC data. This creates a more inclusive and wider sector definition and captures more relevant vacancy data.

Source: Lightcast, under licence from Greater Lincolnshire LEP

Unique online Visitor Economy vacancy numbers in West Lindsey, Sep 2018 – Aug 2023



Unique online Visitor Economy vacancy numbers index (Sep 2018 = 100) Sep 2018 – Aug 2023 index



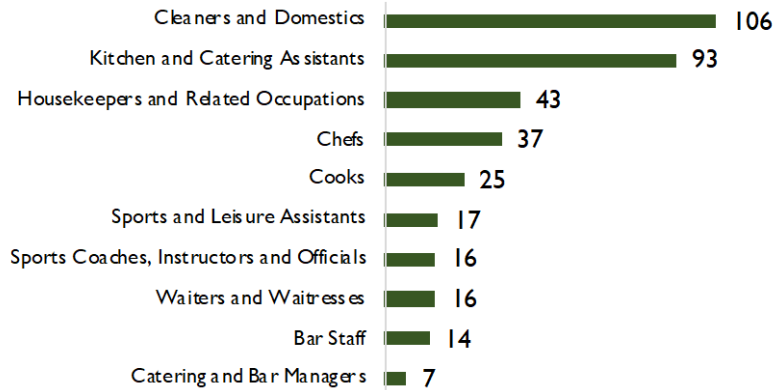
VACANCIES IN THE VISITOR ECONOMY Cont.



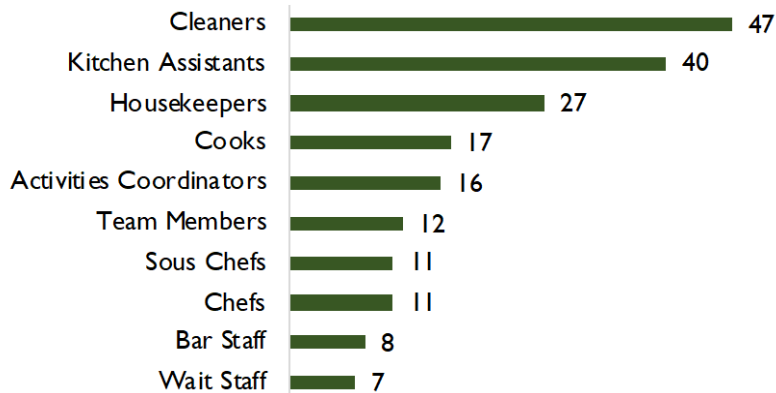
EMPLOYERS



Top occupations of West Lindsey Visitor Economy vacancies posted between Sep 2022 – Aug 2023



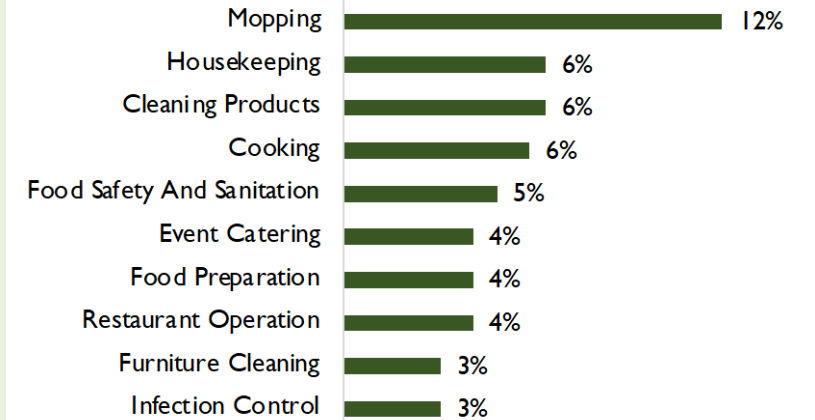
Top job titles of West Lindsey Visitor Economy vacancies posted between Sep 2022 – Aug 2023



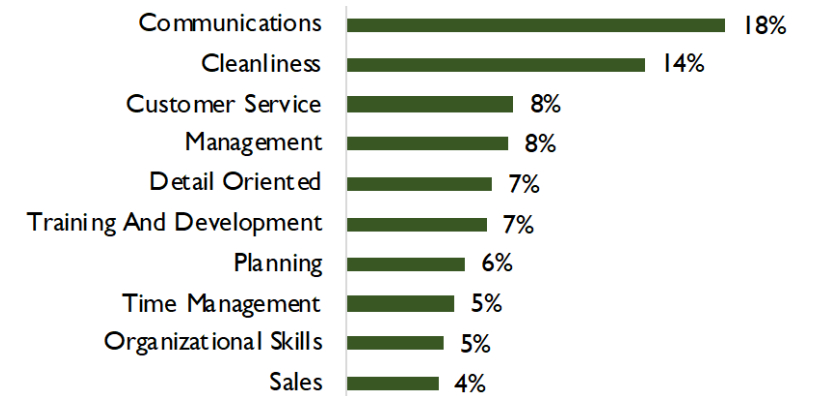
Both the list of top occupations and top job titles of Visitor Economy vacancies posted over the last year are dominated by cleaning and kitchen staff. We can also clearly see the skills specific to these roles being highlighted throughout the list of top specialist skills requested by recruiting Visitor Economy employers.

Source: Lightcast, under licence from Greater Lincolnshire LEP

Top specialist skills requested in West Lindsey Visitor Economy vacancies posted between Sep 2022 – Aug 2023



Top core skills requested in West Lindsey Visitor Economy vacancies posted between Sep 2022 – Aug 2023



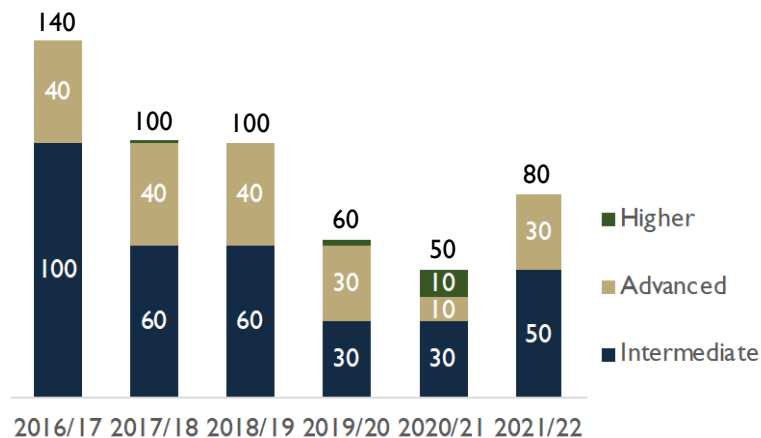
VISITOR ECONOMY FURTHER EDUCATION & SKILLS



SKILLS INFRASTRUCTURE



Visitor Economy Apprenticeship Starts in West Lindsey



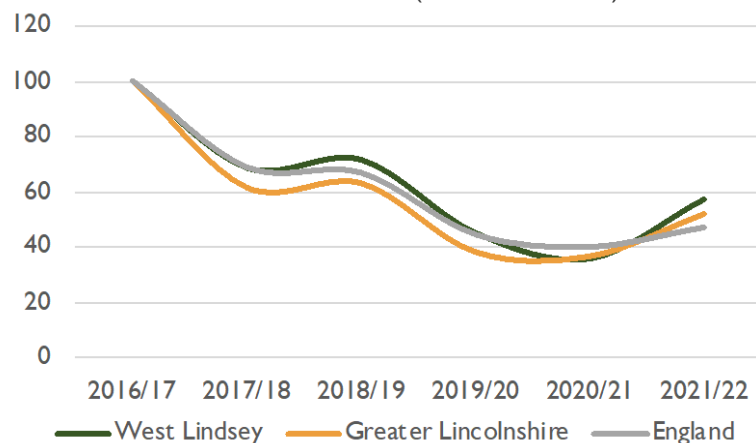
Apprenticeship starts in West Lindsey in subject areas closely aligned with the Visitor Economy fell to a low of 50 in 2020/21, down from 140 starts recorded in 2016/17. Numbers have subsequently increased to 80 in 2021/22, and this overall trend in starts is mirrored at Greater Lincolnshire and national levels.

Enrolments in West Lindsey in subject area 'aims' closely aligned with the Visitor Economy are higher, but they too have fallen, year on year, from 2019/20 and are now down to 150 in 2021/22. This is certainly at odds with the national trend where numbers have held up over the three-year period.

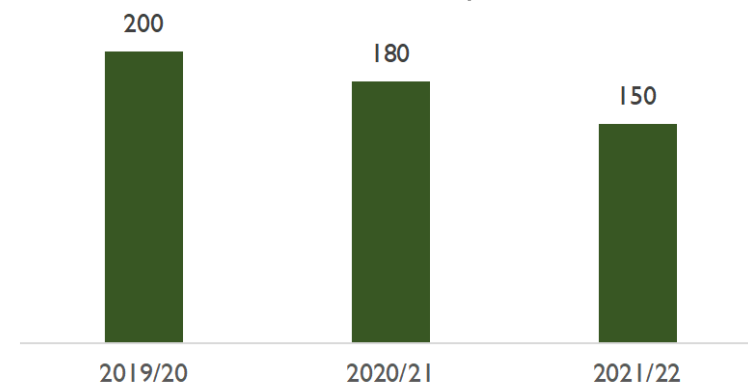
Note: Visitor Economy Apprenticeship and Education & Training numbers are the sum of the following sector subject areas – 'Leisure, travel and tourism', 'Retail and commercial enterprise', and 'Arts, media and publishing'.

Source: Department for Education

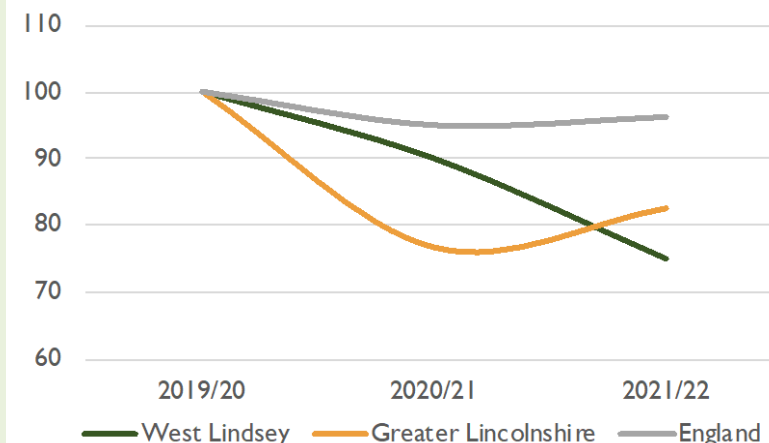
Change in Visitor Economy Apprenticeship Starts, 2016/17 – 2021/22 (2016/17 = 100)



Visitor Economy Education & Training Aim Enrolments in West Lindsey



Change in Visitor Economy Education & Training Aim Enrolments 2019/20 – 2021/22 (Index - 2019/20=100)



CONSTRUCTION



This sector summary brings together the various insights that we have gleaned regarding the Construction sector in West Lindsey from our desktop research.

The Construction sector is described as an “underpinning sector” by the Greater Lincolnshire Local Enterprise Partnership with “significant opportunity for cross-sector collaboration and innovation”.

The sector covers several building and construction activities, including:

- Development of building projects
- Construction of residential and non-residential buildings
- Construction of roads and railways
- Construction of utility projects
- Demolition and site preparation
- Electrical, plumbing, and other construction installation activities
- Building completion and finishing



CONSTRUCTION – SUMMARY



The data tells us that:

- The Construction sector currently employs approximately 2,500 people in West Lindsey, 8% of total employment in the district.
- The 'Lincoln Fringe' area currently supports just over a third (34%) of total construction jobs, with numbers more than doubling since 2015, whilst numbers in Gainsborough are relatively low.
- Looking ahead over this decade, the sector is projected to grow by around 200 jobs and will need to fill approximately 700 jobs due to replacement demand.
- Levels of demand from the sector (measured by vacancy numbers) have now returned to pre-COVID levels but remain strong across higher and lower-level Construction occupations.
- Trends in the Construction sector Apprenticeship starts in West Lindsey are stable at around 50 per year, and in line with what we would expect given the sector's size (in employment terms). Enrolments in the Construction sector Education & Training subject 'aims' follow a similar trend albeit with a recent jump in numbers.

Through our skills conversations, local stakeholders are telling us that:

- Locally-led housing and other infrastructure initiatives will increase demand for construction jobs locally, following reports of a recent slow-down in demand.
- Transport remains a significant barrier, especially for young people, accessing entry-level construction site jobs in this rural area. This has been exacerbated by the requirement for many young people to attend further education construction courses out-of-area.
- Although a national policy issue, the requirement for Maths and English attainment in all Apprenticeships is seen as a factor in dulling demand from young people from schools where attainment levels are lower.
- The lack of a local profile of construction careers in the district after the construction careers college was relocated from Gainsborough is also seen as a factor in reducing the take-up of construction careers.

Key Considerations:

- Is there an opportunity to raise the profile of construction careers in Gainsborough and Rural West Lindsey? This is especially pertinent when given both local opportunities and the significantly expected increased demand for construction skills in northern Lincolnshire and, in the longer term, in neighbouring Bassetlaw in respect of STEP Fusion.
- There is a real opportunity to align and co-ordinate publicly steered local infrastructure investment with wider social value in terms of school engagement, work experience, and Apprenticeship starts – perhaps as a way of re-raising the profile of construction careers locally.

CONSTRUCTION DESKTOP RESEARCH - EMPLOYERS



- “58% of organisations struggling to hire the skills they need...An ageing workforce heading into retirement, the impacts of Brexit and a low number of young people opting for a career in construction are all having a damaging impact on UK infrastructure delivery and affordable housing programme.” (Keen, March 2023).
- The Construction sector reported in 2022 that it had a skills gap density of 5.4% (the proportion of its employees judged not fully proficient), up from 4.0% in 2017. (Employer Skills Survey, Department for Education)
- “937,000 new workers will be needed in the construction and trade industries by 2032 to meet the ever-growing demand.” (PBC Today, 18th July 2023).
- “Seventy-five per cent of contractors have issues recruiting skilled operatives, according to a new survey from the Civil Engineering Contractors Association (CECA).” (Lorimer, Nov. 2022).
- “The largest increases in annual demand will be for occupations such as carpenters and joiners and construction managers, along with a range of technical roles. These include electronics technicians, civil engineering technicians, estimators, and valuers, as well as office-based support staff.” “Recruitment pinch points for: private housing, infrastructure, repairs, and maintenance.” (CITB, 2022).
- “There remains demand for skilled construction and building trades locally, particularly given the levels of development put forward within local plans....” (GLLEP, Skills Report, Jan. 2022).
- “The Gelder Group is a multi-award winning construction company located on the A1500 between Gainsborough and Lincoln...Gelder have 268 employees. There is a massive shortage of skilled workers in the construction industry across the UK and our mission has always been to support the next generation and reduce that gap as much as possible.” (Steve Gelder, in WLDC, Feb 2022).



CONSTRUCTION DESKTOP RESEARCH - PEOPLE



- “The construction ...sector accounts for 6% ...of all workforce jobs... 30% of jobs in construction are in self-employment.” (UK Government, March 2023).
- “A fifth of construction professionals believe construction talent shortages over the next five to 10 years will be caused by a shortage of digital and technology skills.” (Keen, March 2023).
- “Training in construction is simply not keeping up with the pace of change, which is seeing increased digitisation and innovation, and a drive to meet net zero carbon.” (PBC Today, April. 2023).
- “UK has less than 2 per cent of the TrustMark-registered retrofit coordinators needed to assess homes and advise people on energy-efficiency opportunities, as well as linking them up with firms to deliver works.” (Lorimer, Nov. 2022).



CONSTRUCTION DESKTOP RESEARCH – SKILLS INFRASTRUCTURE



- In 2016 – Lincoln College (in Gainsborough) launched a Construction ‘Career College’ (no longer in operation) that specialised in Construction with 75 employer-led spaces for 16-19-year-olds. Industry partners included: “Gelder Group, Lindum Group, Robert Woodhead, Longhurst Housing Group, Ongo Homes, and West Lindsey District Council.” (Rannard, April 2016).
- “Gelder Group apprentices gain experience on retirement flats scheme. £3m scheme in partnership with Ongo housing and WLDC .“Gainsborough Construction Career College bricklaying students to gain vital on-site experience”. (Gelder, Feb, 2019).



EMPLOYMENT IN CONSTRUCTION



EMPLOYERS



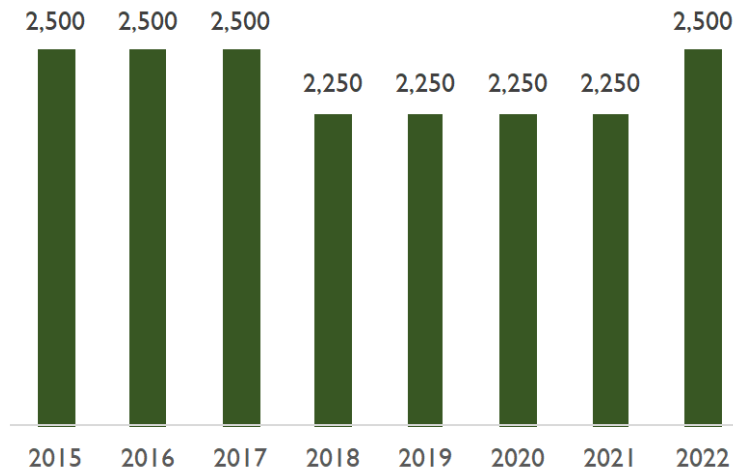
The Construction sector currently employs approximately 2,500 people in West Lindsey, 8% of total employment in the district. Just over half (51%) of employment in the sector is in the 'Rural West Lindsey' area.

Employment in the Construction sector in West Lindsey has been reasonably stable over time, hovering around 2,250-2,500 jobs since 2015. However, across our three sub-district geographies, we can see a significant change in employment, with Gainsborough and 'Rural West Lindsey' experiencing declines whilst job numbers in the 'Lincoln Fringe' have more than doubled over this period. The 'Lincoln Fringe' currently supports just over a third (34%) of total Construction employment in West Lindsey. This localised increase in sector employment has not been enough for West Lindsey to keep pace with Greater Lincolnshire and national growth levels.

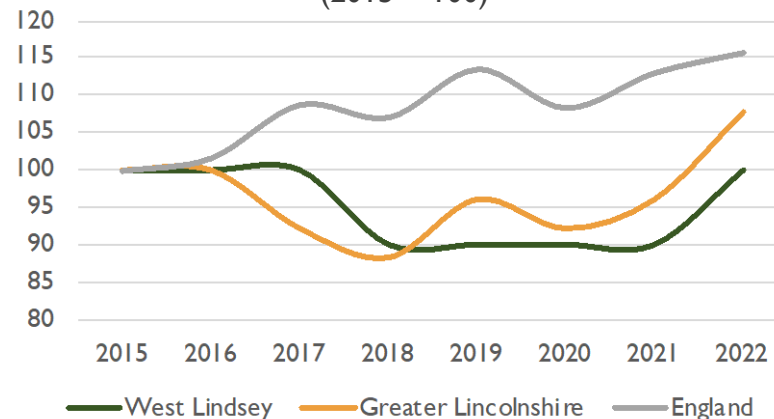
The sector is projected to grow by around 200 jobs over the next decade. However, the main driver of recruitment to the sector will be replacement demand (i.e., demand arising in the sector due to people leaving the workforce, mainly through retirement), with 700 jobs projected to need filling before the end of 2030.

Source: Business Register and Employment Survey, Office for National Statistics; Lightcast, under licence from Greater Lincolnshire LEP; Working Futures 2017-2027, Department for Education

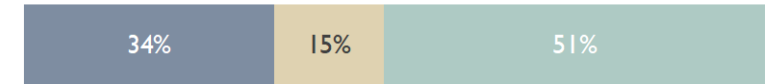
Construction employment in West Lindsey, 2015 - 2022



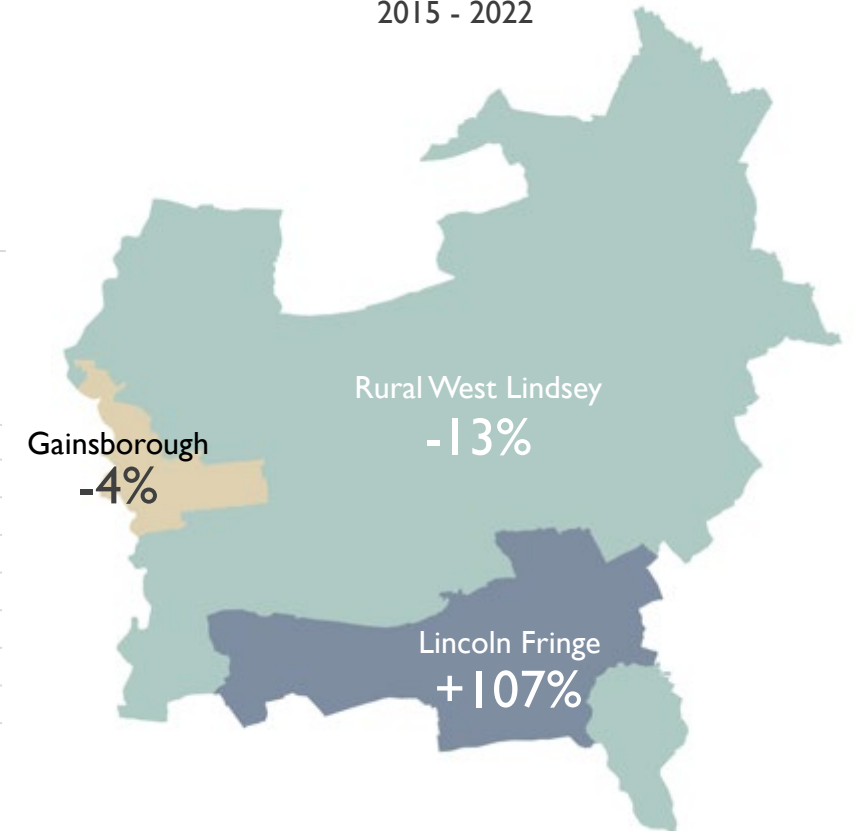
Change in Construction employment, 2015 – 2022
(2015 = 100)



Construction employment across West Lindsey, 2022



Change in Construction employment across West Lindsey, 2015 - 2022



VACANCIES IN CONSTRUCTION



EMPLOYERS



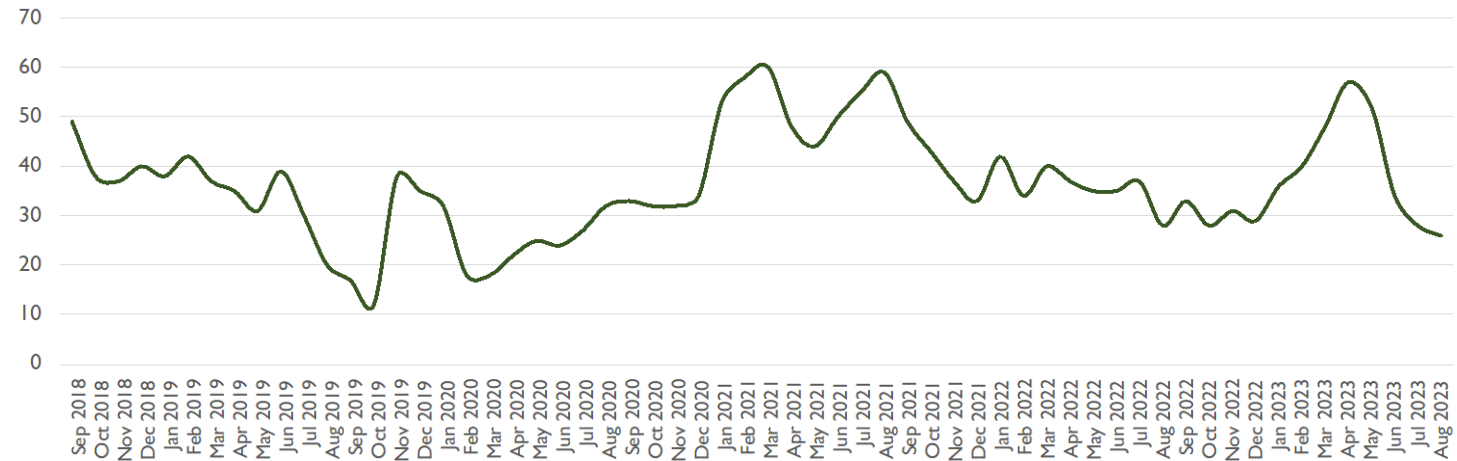
Sector vacancy numbers were on a downward trend until around the end of 2019. Between 2020 and mid-2021, vacancy numbers generally increased, reaching a high of 60 vacancies per month. Since then, the trend has been decreasing numbers overall, although we can see an uplift and spike in vacancy numbers in early/mid-2023. Much of the surge in demand between early 2020 and mid-2021 can be attributed to increased activity in home improvement work, driven by people spending much more time at home during this period, either due to lockdowns or working from home.

This overall trend in vacancy numbers is mirrored across Greater Lincolnshire and nationally, although changes in demand levels have been higher.

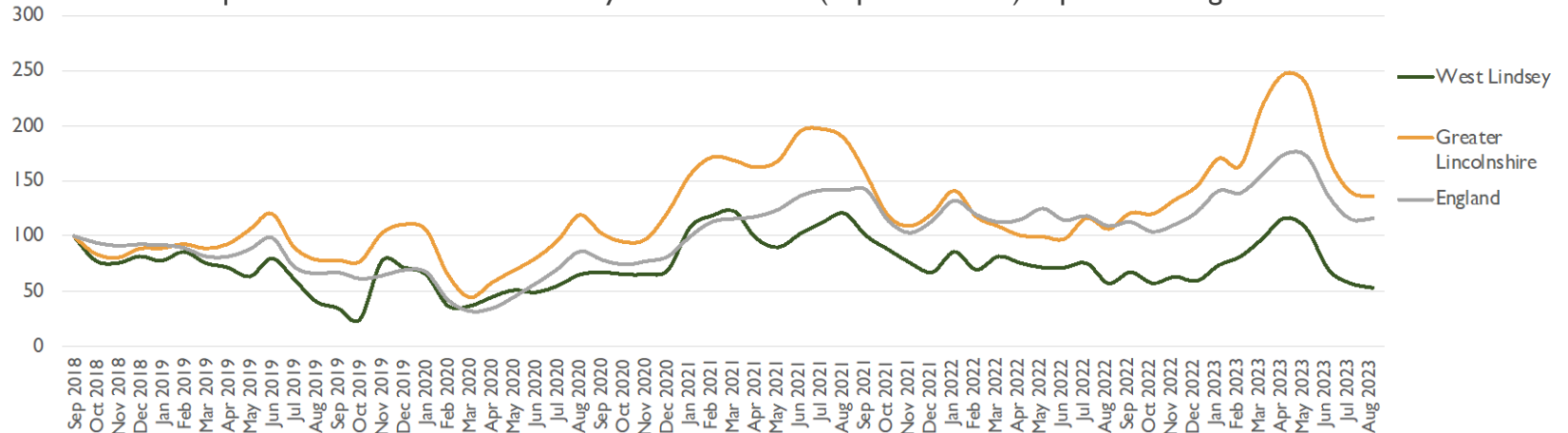
Note: This analysis uses a standard occupational classification (SOC) definition for the sector as opposed to a standard industrial classification (SIC) definition. We have used occupations that are closely aligned with the sector based on cross-referencing national-level SOC and SIC data. This creates a more inclusive and wider sector definition and captures more relevant vacancy data.

Source: Lightcast, under licence from Greater Lincolnshire LEP

Unique online Construction vacancy numbers in West Lindsey, Sep 2018 – Aug 2023



Unique online Construction vacancy numbers index (Sep2018 = 100) Sep 2018 – Aug 2023 index



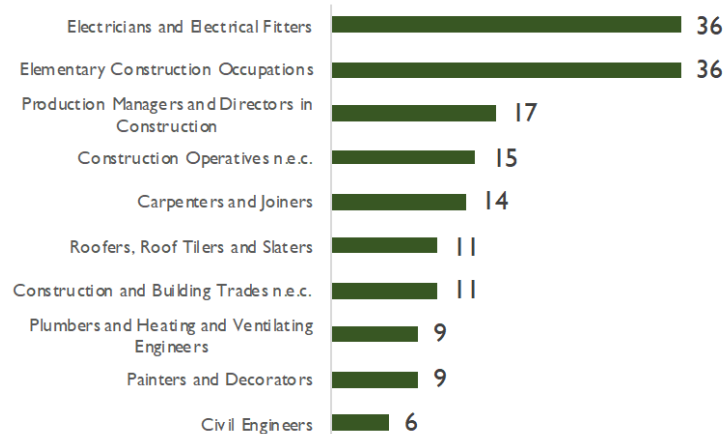
VACANCIES IN CONSTRUCTION Cont.



EMPLOYERS



Top occupations of West Lindsey Construction vacancies posted between Sep 2022 – Aug 2023

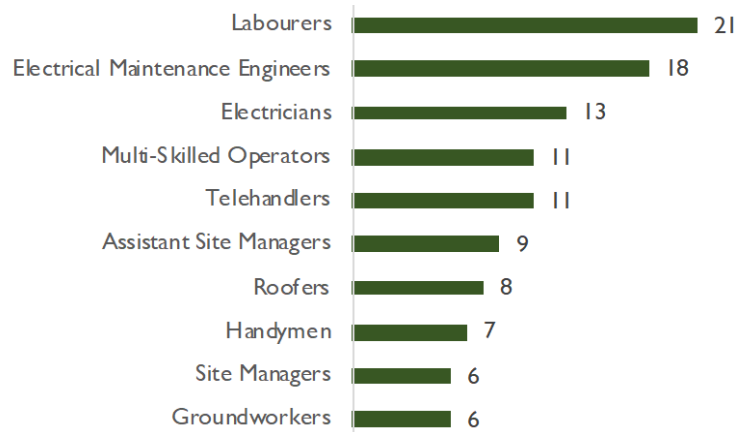


The different types of occupations and job titles listed in Construction vacancies over the last year show a real mix of demand for both higher and lower-level skills in the sector. At the lower end, we see strong demand for entry-level positions such as 'Elementary Construction Operatives' and 'Labourers'. At the higher level, there is a strong demand for 'Electricians,' and 'Electrical Engineers,' other skilled trades, such as 'Carpenters, and Joiners' and 'Roofers,' as well as 'Production Managers and Directors in Construction' – mainly in the form of site management roles.

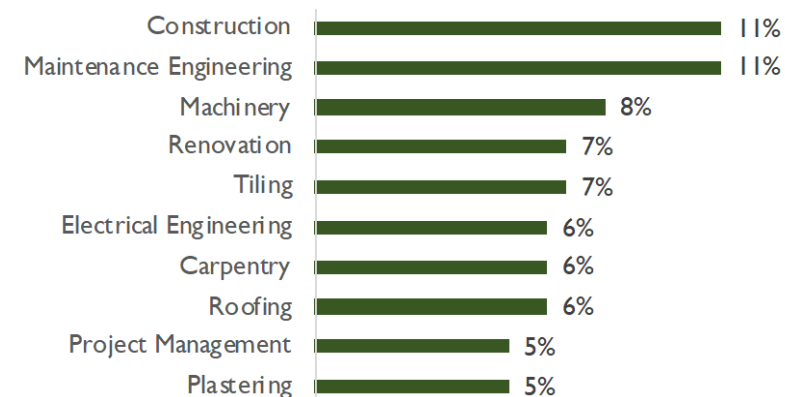
Regarding the specialist skills requested in these vacancies, 'Engineering' features strongly alongside general 'Construction' skills. As for the core skills being requested, 'Communications', 'Customer Service' and 'Management' form the top three, though we also note that 'Willingness to Learn' features strongly, reflecting the entry-level nature of many of the job roles on offer.

Source: Lightcast, under licence from Greater Lincolnshire LEP

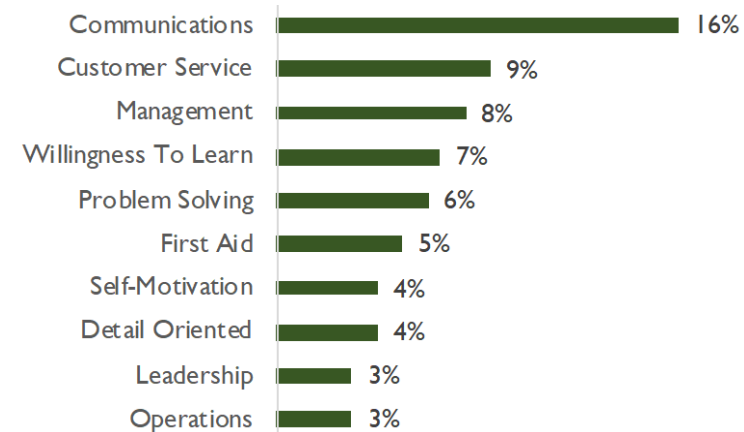
Top job titles of West Lindsey Construction vacancies posted between Sep 2022 – Aug 2023



Top specialist skills requested in West Lindsey Construction vacancies posted between Sep 2022 – Aug 2023



Top core skills requested in West Lindsey Construction vacancies posted between Sep 2022 – Aug 2023



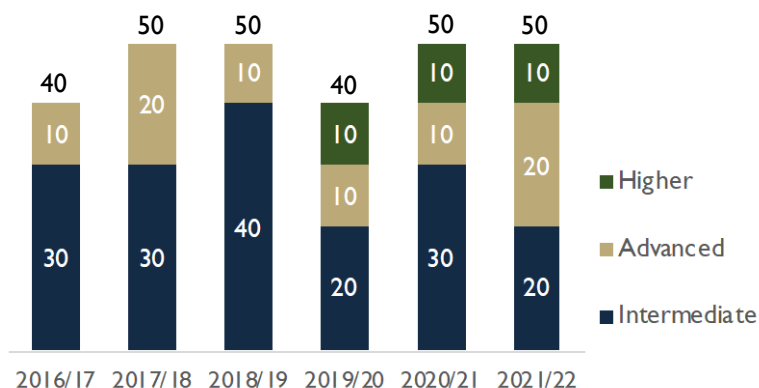
CONSTRUCTION FURTHER EDUCATION & SKILLS



SKILLS INFRASTRUCTURE



Construction, Planning and the Built Environment
Apprenticeship Starts in West Lindsey



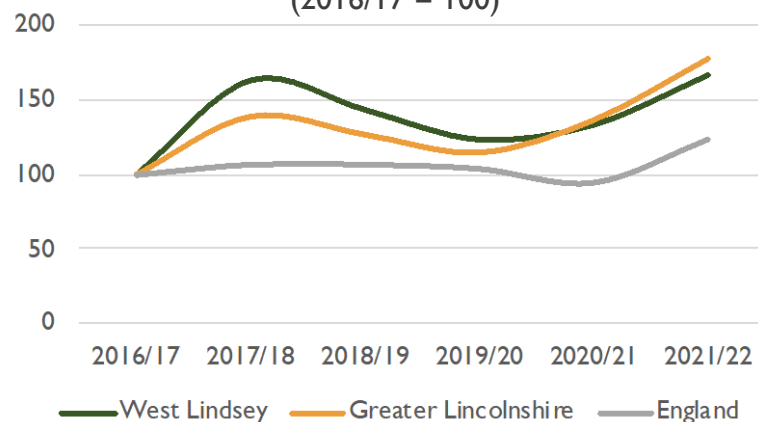
Apprenticeship starts in West Lindsey in subject areas closely aligned with the Construction sector have been consistent since 2016/17 at around 40-50 per academic year. This number aligns with the proportion of overall employment that the sector provides (around 8%). This trend in apprenticeship start numbers is also similar to that seen in overall employment in the sector. In more recent years we can see the introduction of higher-level apprenticeship starts in this area.

Changes in West Lindsey's Apprenticeship start numbers in Construction sector subject areas have closely mirrored those changes observed at both Greater Lincolnshire and national levels.

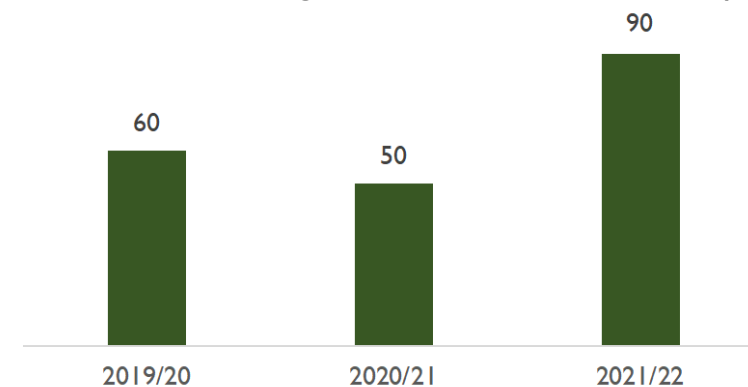
Enrolments in West Lindsey in Education and Training subject area 'aims' closely aligned with the Construction sector were tracking Apprenticeship start levels between 2019 and 2021, but this latest academic year of 2021/22 has seen a sharp increase in numbers, up from 50 to 90. Again, this trend can be broadly seen across both Greater Lincolnshire and national levels.

Source: Department for Education

Change in Construction, Planning and the Built Environment Apprenticeship Starts, 2016/17 – 2021/22
(2016/17 = 100)



Construction, Planning and the Built Environment
Education & Training Aim Enrolments in West Lindsey



Change in Construction, Planning and the Built Environment Education & Training Aim Enrolments 2019/20 – 2021/22 (Index - 2019/20=100)

