



Exeter Skills Strategy: Evidence Base

Final report prepared for:

Exeter City Council

Prepared by:

Transform Research

25th March 2019

Transform Research Consultancy Ltd
52 Longbook Street, Exeter, EX4 6AH
www.transformresearch.co.uk

CONTENTS

1.	Introduction	3
1.1	The Evidence Base	3
1.2	Business Engagement	3
2.	The Local Economic Landscape and Demand for Skills	4
2.1	Economic activity and employment	4
2.1.1	Economic activity	4
2.1.2	Numbers in employment	5
2.1.3	Employment by occupation	7
2.1.4	Employees by industry	9
2.1.5	Jobs density	10
2.1.6	Private and public sector employment	10
2.2	Pay	11
2.3	Unemployment and disadvantage	11
2.4	Business base (number of business enterprises)	12
2.5	Recruitment and vacancies	14
2.6	Forecasts for productivity and employment	17
2.6.1	Productivity growth and forecasts	17
2.6.2	Employment forecasts	19
3.	The Supply of Skills	20
3.1	Population and labour supply	20
3.1.1	Current population and labour supply	20
3.1.2	Population forecasts and labour supply	21
3.2	Educational attainment	25
3.2.1	Key stage 4	27
3.2.2	Key stage 5	28
3.2.3	A Level stem subjects	29
3.3	Destinations following key stage 5	29
3.4	Young people not in education, training or employment (NEET)	30
3.5	Apprenticeships	30
3.6	Training provider base	33
3.7	Higher education	33
3.8	Graduate retention and destination	34
3.9	Migration	35
3.10	House prices	36
4.	Mapping the Demand and Supply of Skills	37
4.1	Skills and labour supply skills shortages	37
4.2	Labour demand and economy	40
4.3	Cross-cutting themes	41
4.4	Issues for consideration in the Skills Strategy	42
APPENDIX I Data sources and references		44

1. Introduction

In January 2019 Exeter City Council commissioned Transform Research to provide support with the development of the Exeter Skills Strategy. Transform were commissioned to complete two pieces of work for informing the Strategy;

- The compilation of a comprehensive evidence base; and
- A survey of Exeter businesses.

The intention was that from both of these documents a set of recommendations would be produced in consultation and conjunction with officers to form the basis of the Exeter Skills Strategy. This document provides the detail of the evidence base, while a separate accompanying report contains the details of the findings of the business survey.

1.1 The Evidence Base

The evidence base presented in this report is based on secondary research and analysis of the relevant data and information relating to skills and employment indicators. The data covers two principal areas; Exeter and additionally Exeter with East Devon, Mid Devon and Teignbridge (Greater Exeter). This has been done to enable comparisons to be drawn and the impact of Exeter to clearly be seen. The data sets and indicators in the evidence base include the following:

- Skills; covering qualifications, Apprenticeship starts and attainment;
- Employment; claimant counts, job density, sectors/occupations, vacancy rates, unemployment, earnings and associated forecasts;
- Young People; destinations (post 16 and post 18), graduate retention (and other relevant available information), STEM subject take-up, attainment at key stage 4 and 5

As well as the comparisons between the Greater Exeter Local Authorities, the evidence base also benchmarks Exeter's performance against corresponding National and South West regional data – where available and appropriate. The analysis of the data and trends has been undertaken to support recommendations for priority areas for investment and where action is required. The data has been gathered and presented in this report in the following stages:

- The Local Economic Landscape and Analysis of Skills Demand;
- Analysis of Skills Supply;
- Mapping Demand and Supply; and
- Conclusions: Skills Gaps and Mismatches.

1.2 Business Engagement

To complement the data collated through the evidence base, a survey of 200 Exeter businesses has been completed to provide quality business feedback about employment and skills issues within the city. The survey results are statistically significant and represent the sectoral composition of Exeter. The findings presented in the separate survey report cover key topics of interest to the development of the Skills Strategy including;

- Recruitment – Vacancies, Challenges and Requirements;
- Skills Sets – Existing and Future Requirements;
- Apprenticeships and Training; and
- Engagement with Education.

2. The Local Economic Landscape and Demand for Skills

This section presents an analysis of the available data on Exeter's economic landscape and the demand for skills in the area, together with comparisons with regional and national figures. This analysis identifies the current and potential future skills needs of the local workforce in the context of forecast workforce and business sector changes over the next ten years. The information presented:

- Defines the existing employment and skills stocks in the locality;
- Details the overall business base, while also examining sectors and occupations; and
- Assesses the forecast changes that could impact on businesses future skills needs.

Section 4 of this document then combines this assessment with that on the supply of skills from section 3, to produce a mapping of likely available skills against those required in the area; together with an assessment of the types and causes of any identified skills gaps.

2.1 Economic Activity and Employment

2.1.1 Economic activity

Tables 2.1 and 2.2 below present data on overall economic activity – the number of residents who are either in employment or unemployed – over the ten-year period since 2009. Table 2.1 compares Exeter with the Greater Exeter area as well as the South West and the national picture. The figures show that while the proportion of the resident working age population who are economically active has remained consistent at around 80%, because of the increase in the overall population size the numbers of people who are economically active has increased.

Table 2.1 Number of Residents Economically Active (% of working age population)

	Exeter	Greater Exeter	South West	United Kingdom
Jan 09 – Dec 09	63,800 (82.2%)	230,000 (81.2%)	2,680,000 (79.4%)	31,560,000 (76.8%)
Jan 14 – Dec 14	69,500 (82.9%)	237,500 (81.9%)	2,752,000 (80.1%)	32,773,000 (77.7%)
Oct 17 – Sept 18	70,600 (79.8%)	239,800 (80.7%)	2,877,000 (81.1%)	33,906,000 (79.0%)
Change (2009-2017/18)	6,800 (+10.7%)	9,800 (+4.2%)	197,000 (+7.4%)	2,346,000 (+7.4%)

Source: NOMIS

This increase is particularly evident in Exeter, where the number of residents who are economically active has increased by 6,800 (+10.7%) – reflecting the population growth of the city over this time (see section 3). The Greater Exeter area has also seen a growth in numbers of economically active residents, albeit at a slower rate than in Exeter, regionally and nationally. Table 2.2 provides a breakdown for the four Local Authority areas within Greater Exeter – it shows that East Devon, Mid Devon and Teignbridge have had much lower rates of growth than Exeter, the South West and the UK.

Table 2.2 Greater Exeter: Local Authority Number of Residents Economically Active (2009 – 2018)

	Exeter	East Devon	Mid Devon	Teignbridge
Jan 09 – Dec 09	63,800 (82.2%)	61,800 (79.6%)	42,300 (82.3%)	62,100 (81.2%)
Jan 14 – Dec 14	69,500 (82.9%)	62,900 (81.2%)	41,500 (81.3%)	63,600 (83.2%)
Oct 17 – Sept 18	70,600 (79.8%)	63,500 (79.1%)	42,600 (84.6%)	63,100 (81.0%)
Change (2009-2017/18)	6,800 (+10.7%)	1,700 (+2.8%)	300 (+0.7%)	1,000 (+1.6%)

Source: NOMIS

2.1.2 Numbers in employment

Tables 2.3 and 2.4 below present data on the number of residents in employment (including employees, self-employed, those on government-supported training and employment programmes; and those doing unpaid family work) during the decade since 2009. Table 2.3 shows that there has been an increase of 7,500 (+12.6%) residents of Exeter in employment over the period. (This figure is greater than the 6,800 increase in the number of economically active residents reported in the previous section because of the reduction in the rate of unemployment over the time period).

Table 2.3 Numbers in Employment (% of working age population)

	Exeter	Greater Exeter	South West	United Kingdom
Jan 09 – Dec 09	59,500 (76.6%)	216,500 (76.4%)	2,506,000 (74.1%)	29,076,000 (70.7%)
Jan 14 – Dec 14	67,100 (80.0%)	228,700 (78.9%)	2,611,000 (76.1%)	30,789,000 (73.0%)
Oct 17 – Sept 18	67,000 (77.5%)	233,800 (78.7%)	2,787,000 (79.1%)	32,535,000 (75.8%)
<i>Change (between 2009 – 2017/18)</i>	<i>7,500 (+12.6%)</i>	<i>17,300 (+8.0%)</i>	<i>281,000 (+11.2%)</i>	<i>3,459,000 (11.9%)</i>

Source: NOMIS

The increase in the numbers of residents in employment is again most evident in Exeter, where the growth in absolute numbers (7,500) and proportionate increase (+12.6%) are both markedly larger than any of the neighbouring local authorities. Proportionately, the Exeter increase is also slightly larger than the regional and national increases over the same time. Table 2.4 provides a breakdown for the four Local Authority areas within Greater Exeter – again showing that East Devon, Mid Devon and Teignbridge have had much lower rates of growth than Exeter, the South West or the UK.

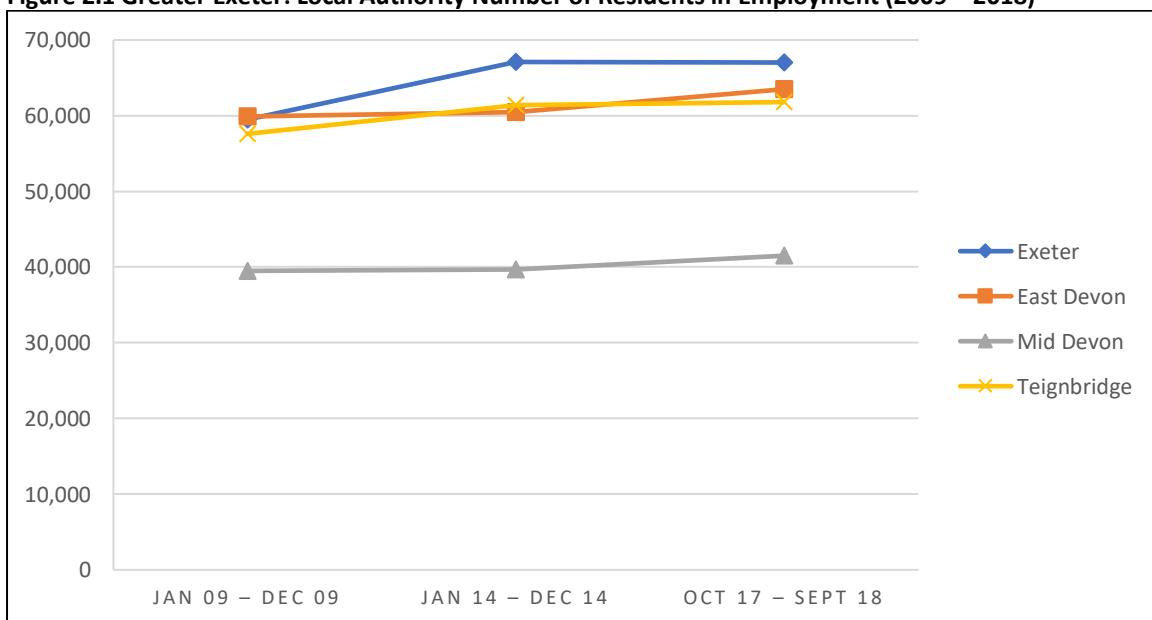
Table 2.4 Greater Exeter: Local Authority Numbers in Employment (2009 – 2018)

	Exeter	East Devon	Mid Devon	Teignbridge
Jan 09 – Dec 09	59,500	59,900	39,500	57,600
Jan 14 – Dec 14	67,100	60,500	39,700	61,400
Oct 17 – Sept 18	67,000	63,500	41,500	61,800
<i>Change (between 2009 – 2017/18)</i>	<i>7,500 (+12.6%)</i>	<i>3,600 (+6.0%)</i>	<i>2,000 (+5.0%)</i>	<i>4,200 (+7.3%)</i>

Source: NOMIS

Figure 2.1 illustrates the difference in growth for the four Local Authority areas within Greater Exeter.

Figure 2.1 Greater Exeter: Local Authority Number of Residents in Employment (2009 – 2018)



While the overall growth in the number of Exeter residents who are economically active and, hence, the numbers who are in employment are closely linked to the growth in population in the city, it is worth examining some significant underlying trends that do not follow exactly the same pattern. These trends are useful for informing the development of the skills strategy, as they highlight how some particular groups of Exeter residents have been affected by the overall growth in employment. There are three underlying trends that stand out as being noteworthy in this respect:

- The continuing reduction in the numbers of people who are unemployed;
 - The slight decrease in the number of people who are employees; and
 - The very marked increase in the number of people who are self-employed.
- ***The reduction in the numbers of residents who are unemployed***

Table 2.5 illustrates the decline in the number of unemployed residents in all Local Authorities in greater Exeter between 2009 and 2018, with the biggest absolute decrease being 2,100 in Exeter.

Table 2.5 Greater Exeter: Local Authority Numbers of Residents Unemployed (2009 – 2018)

	Exeter	East Devon	Mid Devon	Teignbridge	Total
Jan 09 – Dec 09	4,100	2,400	2,100	3,000	11,600
Jan 14 – Dec 14	3,600	2,200	1,400	2,500	9,700
Oct 17 – Sept 18	2,000	1,300	900	1,400	5,600
<i>Change (2009-18)</i>	<i>-2,100 (-51.2%)</i>	<i>-1,100 (-45.8%)</i>	<i>-1,200 (-57.1%)</i>	<i>-1,600 (-53.3%)</i>	<i>-6,000 (-51.7%)</i>

Source: NOMIS

- ***The decrease in the number of residents who are employees***

Table 2.6 shows that within Exeter there has also been a decrease in the number of residents who are employees – by 1,900 (–3.4%) between 2009 and 2018. This is in direct contrast to the three other Local Authorities in greater Exeter, all of whom increased by at least 3%.

Table 2.6 Greater Exeter: Local Authority Numbers of Residents who are Employees (2009 – 2018)

	Exeter	East Devon	Mid Devon	Teignbridge	Total
Jan 09 – Dec 09	55,400	47,500	32,000	47,800	182,700
Jan 14 – Dec 14	58,000	46,200	27,000	53,400	184,600
Oct 17 – Sept 18	52,600	49,500	33,000	50,900	186,000
<i>Change (2009-18)</i>	<i>-1,900 (-3.4%)</i>	<i>2,000 (+4.2%)</i>	<i>1,000 (+3.1%)</i>	<i>3,100 (+6.4%)</i>	<i>3,300 (+1.8%)</i>

Source: NOMIS

- ***The increase in the number of residents who are self-employed***

There has been a very significant growth in the number of residents who are self-employed in both Exeter and East Devon between 2009 and 2018. In Exeter there has been an increase of c.8,000 to c.14,000 from just 5,900 in 2009, while in East Devon the number has grown by 2,300. The 13,900 self-employed people in Exeter represent 15.7% of the working age population (aged 16 – 64 years) of 88,800 and 10.8% of the total population in the city of 128,900.

Table 2.7 Greater Exeter: Local Authority Numbers of Residents in Self-Employment (2009 – 2018)

	Exeter	East Devon	Mid Devon	Teignbridge	Total
Jan 09 – Dec 09	5,900	11,100	7,600	9,800	34,400
Jan 14 – Dec 14	8,700	14,300	11,900	8,000	42,900
Oct 17 – Sept 18	13,900	13,400	8,000	10,100	45,400
<i>Change (2009-18)</i>	<i>8,000 (+136%)</i>	<i>2,300 (+20.7%)</i>	<i>400 (+5.2%)</i>	<i>300 (+3.1%)</i>	<i>11,00 (+31.2%)</i>

Source: NOMIS

These figures demonstrate some interesting factors at play in Exeter's economy – while the overall number of residents in employment has risen over the last decade, the number who are employees has actually *decreased*. At the same time, the number who are unemployed has also decreased markedly. However, the very marked *increase* in the number of self-employed Exeter residents has more than compensated for these two changes. Indeed, the self-employed now account for 14.4% of those aged 16-64 - a higher percentage than across the South West (12.2%) and the UK (10.6%).

2.1.3 Employment by occupation

Table 2.8 below presents data on the occupations of residents in employment (including employees, self-employed, those on government-supported training and employment programmes; and those doing unpaid family work).

The table clearly shows the greater proportion of higher-level occupations (managerial, professional and associate professional/technical jobs) among residents of the city – accounting for over half of their occupations (53.7%) compared with Greater Exeter (47.2%), the South West (44.7%) and the UK (45.6%). The table also show two further marked differences between Exeter and the regional and national occupational profiles:

- The slightly greater proportion of elementary level occupations among Exeter residents. These job roles accounting for 14.6% of occupations compared with residents of the South West (10.6%) and the UK (10.5%); and
- The markedly lower proportion of skilled trades and caring, leisure and service occupations among Exeter residents. These job roles accounting for just 9.0% of occupations among city residents compared with those of the South West (20.8%) and the UK (19.3%).

Table 2.8 Employment by occupation (% of those in employment)

	Exeter	Greater Exeter	South West	United Kingdom
Managers, Directors and Senior	6,200 (9.2%)	(12.3%)	(11.2%)	(10.7%)
Professional Occupations	15,800 (23.5%)	(20.3%)	(19.1%)	(20.4%)
Associate Professional & technical	14,100 (21.0%)	(16.6%)	(14.4%)	(14.5%)
Admin & secretarial	5,300 (7.9%)	(8.7%)	(9.7%)	(10.2%)
Skilled trades	2,800 (4.1%)	(8.9%)	(11.4%)	(10.2%)
Caring, leisure and services	3,300 (4.9%)	(9.7%)	(9.4%)	(9.1%)
Sales & customer service	6,100 (9.2%)	(5.9%)	(7.5%)	(7.6%)
Process plant & machine ops	3,700 (5.6%)	(5.7%)	(6.3%)	(6.4%)
Elementary occupations	9,800 (14.6%)	(12.0%)	(10.9%)	(10.5%)
Total	67,100 (100%)	(100%)	(100%)	(100%)

Source: ONS Annual Population Survey: Oct 207 – Sept 2018

Table 2.9 contains the occupational data for each of the four Local Authorities within Greater Exeter. It highlights some further differences between Exeter and the other three LAs:

- The lower proportion of elementary level occupations among Mid Devon (8.0%) and Teignbridge (10.7%) residents; and
- The markedly higher proportions of skilled trades and caring, leisure and service occupations among residents of East Devon (23.7%) and Teignbridge (23.5%).

Table 2.9 Greater Exeter: Local Authority Employment by occupation (% of those in employment)

	Exeter	East Devon	Mid Devon	Teignbridge
Managers, Directors and Senior	6,200 (9.2%)	8,900 (14.0%)	4,900 (11.7%)	8,900 (14.3%)
Professional Occupations	15,800 (23.5%)	12,300 (19.4%)	8,200 (19.7%)	11,200 (18.1%)
Associate Professional & technical	14,100 (21.0%)	7,200 (11.3%)	7,200 (17.4%)	10,300 (16.3%)
Admin & secretarial	5,300 (7.9%)	5,300 (8.3%)	5,700 (13.7%)	4,100 (6.7%)
Skilled trades	2,800 (4.1%)	7,200 (11.4%)	3,900 (9.4%)	7,000 (11.3%)
Caring, leisure and services	3,300 (4.9%)	7,800 (12.3%)	4,000 (9.6%)	7,500 (12.2%)
Sales & customer service	6,100 (9.2%)	3,100 (4.8%)	2,200 (5.3%)	2,300 (3.7%)
Process plant & machine ops	3,700 (5.6%)	3,400 (5.3%)	2,100 (5.1%)	4,100 (6.6%)
Elementary occupations	9,800 (14.6%)	8,300 (13.1%)	3,300 (8.0%)	6,600 (10.7%)
Total	67,100 (100%)	63,500 (100%)	41,500 (100%)	61,800 (100%)

Source: ONS Annual Population Survey: Oct 207 – Sept 2018

As noted, Exeter has a greater proportion of its residents (53.7%) in higher-level occupations than Greater Exeter (47.2%), the South West (44.7%) and the UK (45.6%). Table 2.10 and figure 2.2 show how this growth has continued in the city over a sustained period of time.

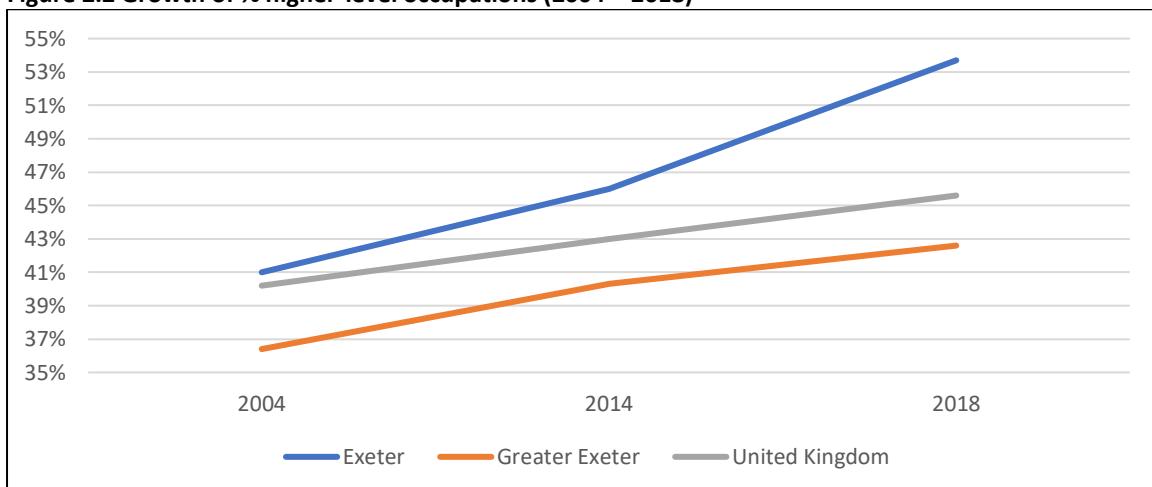
Figure 2.2 Comparison (%) of higher-level occupations among residents (2004 – 2018)

	Exeter	Greater Exeter	United Kingdom
2018	53.7%	42.6%	45.6%
2014	46.0%	40.3%	43.0%
2004	41.0%	36.4%	40.2%

Source: ONS Annual Population Survey

It is also worth remembering that SLIM emphasised this point in their EHOD Evidence base for 2014¹: “*the employment growth in Exeter been accompanied by a growing concentration of employment in these higher-level occupations. Although all parts of the UK have seen an increase in (these) jobs, the increase in Exeter over the last ten years (5%) has been faster than that seen across HotSW (4%) or the UK (3%).*” Figure 2.3 below illustrates that this growth has continued at an accelerated rate since 2014.

Figure 2.2 Growth of % higher-level occupations (2004 – 2018)



Source: ONS Annual Population Survey

It was also highlighted above there has been growth in the number of Exeter residents employed in elementary occupations. This trend towards growth at the top and bottom end of the occupational classifications further corresponds with a reference made by SLIM in their report: that an ‘hourglass’ shaped labour market is emerging. SLIM cite the words of Ewart Keep, Director of SKOPE²:

“There is little evidence that we are currently moving to a world where all jobs demand a high level of formal skills, or which are interesting or well rewarded. In fact, our labour market is following US trends, and is polarising, with growth at the top and the bottom.... the 21st century still demands quite a lot of people who can flip burgers, collect refuse, clean your house, mind your kids, wait table, care for the sick and elderly, clean your office, guard your buildings/cars/airports, serve behind the counter or at checkout in stores, or pull your pint”³.

While SLIM noted that the implications for social mobility and institutions working to help people to move through the narrowing “hour glass” shaped labour market were considerable, there are also considerations associated with the skills needs of the occupations that have grown so markedly and the need to continue to suitably qualified recruits for these roles.

¹ SLIM, Marchmont Observatory, University of Exeter: Exeter and Heart of Devon (EHOD) Skills Plan Evidence Base, 2015

² The Centre of Skills Knowledge & Organisational Performance at the University of Oxford

³ Keep, E. *The future of work may not be highly skilled*, The Edge, Issue 5, ESRC 2000.

2.1.4 Employees by industry

This section presents data about the industrial sector in which employees in Exeter work. It is important to note that the section discusses all employees working in Exeter, that is, it includes the employees who are Exeter residents and those who commute in from elsewhere, rather than just the employees who are residents of Exeter as in the previous sections 2.1.1 – 2.1.3. Table 2.11 below shows that, compared to the national average, Exeter has higher concentrations of employment in:

- Information and Communication;
- Professional, scientific and technical activities;
- Business admin & support; and
- Public administration, education, health and social work.

Table 2.11 Employees by industrial sector – Standard Industrial Classification (% of all employees)

	Exeter	Greater Exeter	South West	United Kingdom
Manufacture, mining, quarrying, utilities, etc (B-E)	4,760 (5.7%)	(8.1%)	(10.0%)	(9.6%)
Construction (F)	4,000 (4.4%)	(6.3%)	(5.3%)	(4.8%)
Wholesale, retail, motor trade (G)	13,000 (14.3%)	(17.6%)	(16.0%)	(15.2%)
Transport & storage (H)	2,500 (2.7%)	(3.7%)	(3.6%)	(4.7%)
Accommodation & food services (I)	6,000 (6.6%)	(9.8%)	(9.8%)	(7.5%)
Information & communication (J)	4,500 (4.9%)	(3.6%)	(3.6%)	(4.4%)
Finance & real estate (K-L)	4,000 (4.4%)	(3.4%)	(5.0%)	(5.2%)
Professional, scientific, etc (M)	8,000 (8.8%)	(7.0%)	(7.3%)	(8.4%)
Business admin & support (N)	9,000 (9.9%)	(7.3%)	(7.4%)	(9.1%)
Public admin, education, health (O, P & Q)	22,000 (35.2%)	(23.5%)	(27.3%)	(26.4%)
Arts, entertainment & other (R & S)	2,750 (3.5%)	(4.6%)	(4.4%)	(4.6%)
Total employment	91,000 (100%)	(100%)	(100%)	(100%)

Source: ONS Business Register and Employment Survey 2017

Table 2.12 contains the same data for the greater Exeter local authorities and shows that, in comparison to Exeter and the national average the surrounding districts (East Devon, Mid Devon and Teignbridge) have higher concentrations of employment in:

- Construction;
- Wholesale & retail;
- Accommodation and food services; and
- Transport & storage.

Table 2.12 Greater Exeter: Local Authority: Employees by industrial sector (% of all employees)

	Exeter	East Devon	Mid Devon	Teignbridge
Manufacture, mining, quarry, utility, etc (B-E)	4,760 (5.7%)	2,910 (6.6%)	4,270 (17.8%)	4,655 (10.4%)
Construction (F)	4,000 (4.4%)	3,500 (8.0%)	1,750 (7.3%)	3,500 (7.8%)
Wholesale, retail, motor trade (G)	13,000 (14.3%)	9,000 (20.5%)	5,000 (20.8%)	9,000 (20.0%)
Transport & storage (H)	2,500 (2.7%)	2,500 (5.7%)	1,250 (5.2%)	1,250 (2.8%)
Accommodation & food services (I)	6,000 (6.6%)	6,000 (13.6%)	2,000 (8.3%)	6,000 (13.3%)
Information & communication (J)	4,500 (4.9%)	1,250 (2.8%)	400 (1.7%)	1,250 (2.8%)
Finance & real estate (K-L)	4,000 (4.4%)	1,200 (2.7%)	450 (1.8%)	1,300 (2.9%)
Professional, scientific, etc (M)	8,000 (8.8%)	2,500 (5.7%)	1,250 (5.2%)	2,500 (5.6%)
Business admin & support (N)	9,000 (9.9%)	2,000 (4.5%)	900 (3.8%)	3,000 (6.7%)
Public admin, education, health (O, P, Q)	22,000 (35.2%)	10,500 (23.9%)	5,350 (22.2%)	10,000 (22.2%)
Arts, entertainment & other (R & S)	2,750 (3.5%)	2,750 (6.2%)	1,400 (5.9%)	2,500 (5.6%)
Total employment	91,000 (100%)	44,000 (100%)	24,000 (100%)	45,000 (100%)

Source: ONS Business Register and Employment Survey 2017

2.1.5 Jobs density

As has often been noted, Exeter is overall an “employment magnet” drawing in many commuters from the surrounding areas. Census data from 2011 indicate that there is a net inflow of c.26,000 commuters, made up of c.37,000 commuters (or c.45% of the workforce) coming into the city and c.11,000 going out. The majority of the 37,000 live in the three surrounding greater Exeter local authority areas.

The need for this large inflow of commuters is shown by the job density figures which represent the ratio of total jobs to population aged 16-64 resident in any given area. The South West average is 0.89 and the national figure is 0.86. Table 2.13 shows how Exeter has a higher ratio than either the regional or national figure – and is far higher than the other Greater Exeter local authorities. Indeed, its job density ratio is actually higher than Greater London (1.02), Bristol (1.01) or Manchester (1.14). This illustrates the vital significance of the city in providing jobs for the whole locality.

Table 2.13 Greater Exeter: Jobs density by local authority

	Exeter	East Devon	Mid Devon	Teignbridge
Total jobs	105,000	61,000	37,000	59,000
Jobs density	1.19	0.79	0.78	0.78

Source: ONS Jobs Density 2017 (The density figures represent the ratio of total jobs to population aged 16-64.)

2.1.6 Private and public sector employment

The profile of employment in Exeter is also distinct in one further aspect – the high number of public sector employees based in the city, compared with elsewhere. The latest NOMIS figures for 2017 indicate that of the c.91,000 employees in the city, nearly a quarter (23.9%) are public sector employees and three quarters (76.1%) private sector. Table 2.14 shows that this proportion of public sector employees is much higher than that found elsewhere in greater Exeter, regionally or nationally. Indeed, the Centre for Cities reports that Exeter has the ninth highest proportion of public sector jobs.

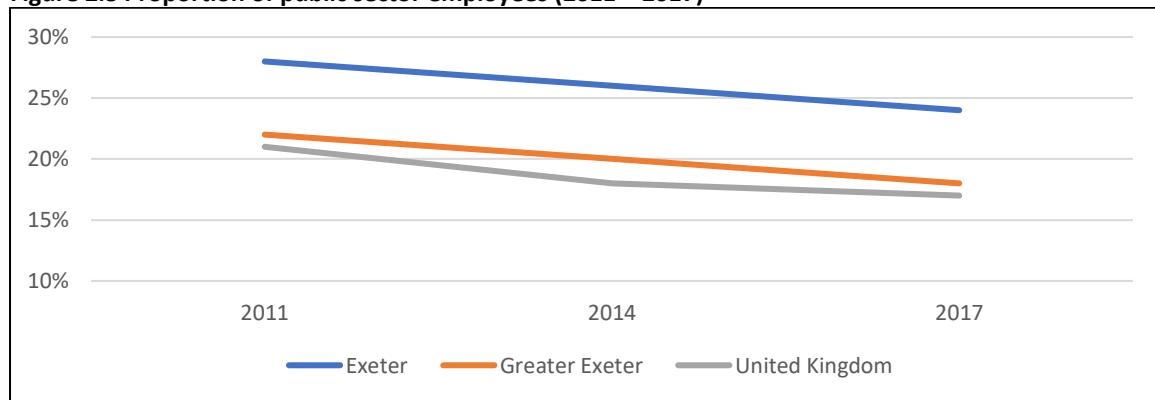
Table 2.14 Greater Exeter: Private and public sector employees

	Exeter	East Devon	Mid Devon	Teignbridge	South West	UK
Private sector	69,399 (76.1%)	39,154 (87.2%)	22,018 (87.5%)	39,072 (85.9%)	2,024,848 (83.4%)	24,453,972 (82.8%)
Public sector	21,839 (23.9%)	5,731 (12.8%)	3,158 (12.5%)	6,399 (14.1%)	403,500 (16.6%)	5,095,918 (17.2%)
Totals	91,238	44,885	25,176	45,471	2,428,348	29,549,891

Source: ONS Business Register and Employment Survey 2017

As would be expected, figure 2.3 shows how the proportion of public sector employees in Exeter has decreased in recent years, broadly in line with national and local trends.

Figure 2.3 Proportion of public sector employees (2011 – 2017)



Source: ONS Business Register and Employment Survey

2.2 Pay

Tables 2.15 and 2.16 below contain data on the median gross weekly wage for full-time workers – based on their place of residence and workplace respectively. The two tables demonstrate again the impact of the number of high-level occupations found in Exeter and their associated higher wages – both on the median earnings in the city and also on the surrounding areas. Overall, Exeter has markedly higher wages than either of the three other Local Authorities in the greater Exeter area. However, they are still slightly below the South West median and noticeably below the UK median, albeit that is influenced by the disproportionate impact of the City of London.

Table 2.15 Median earnings by residence (2018)

	Exeter	East Devon	Mid Devon	Teignbridge	South West	UK
Gross weekly wage (FT workers)	£529.20	£486.30	£505.90	£476.30	£537.60	£569.00

Source: ONS Annual Survey of Hours and Earnings – median earnings from resident analysis (2018)

Table 2.16 illustrates the impact of commuting into Exeter on the median wages of surrounding areas and, of course, why people choose to do it. This is evident from the fact that median earnings by residence are higher in East Devon, Mid Devon and Teignbridge than the median earnings in the workplaces of these areas. Conversely, it is also apparent that median earnings by residence (£529.20) in Exeter are actually *lower* than median earnings by workplace (£564.10) in the city.

Table 2.16 Median earnings by workplace (2018)

	Exeter	East Devon	Mid Devon	Teignbridge	South West	UK
Gross weekly wage (FT workers)	£564.10	£476.10	£478.90	£459.90	£531.20	£569.00

Source: ONS Annual Survey of Hours and Earnings - median earnings from workplace analysis (2018)

2.3 Unemployment and disadvantage

Tables 2.17 and 2.18 show how the growth in employment in Exeter has impacted positively on the level of unemployment in the city and in the surrounding greater Exeter local authority areas. The Centre for Cities reported that Exeter had the third lowest claimant count in the UK in Nov 2018. There have been successive reductions in the number of residents claiming benefits and the proportionate figures are below the regional and national averages. Table 2.17 shows that most of the working age claimants were Employment Support Allowance or Incapacity benefit claims in 2016, although the proportion of these claimants was below the regional and national levels across greater Exeter.

Table 2.17 Working age clients – main out-of-work benefits (2016)

	Exeter	East Devon	Mid Devon	Teignbridge	South West	UK
Total (% of 16-64 residents)	7,710 (8.8%)	6,230 (8.2%)	4,150 (8.9%)	7,360 (9.8%)	62,394 (9.7%)	1,016,289 (11.0%)
Job Seekers	0.7%	0.6%	0.7%	0.6%	0.8%	1.1%
ESA/Incapacity	5.2%	4.6%	4.8%	5.4%	5.5%	6.1%
Lone parents	0.7%	0.6%	0.7%	0.7%	0.8%	1.0%
Carers	1.2%	1.3%	1.6%	1.7%	1.4%	1.7%
Others	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%
Disabled	0.8%	0.8%	0.8%	1.0%	0.9%	0.8%
Bereaved	0.1%	0.2%	0.2%	0.2%	0.2%	0.2%

Source: DWP Claimant records

Table 2.18 demonstrates how the decline in the number of claimants has followed the same broad pattern across the four local authorities in greater Exeter since 2010, albeit being noticeably more marked in Exeter given a higher starting point.

Table 2.18 Percentage of resident working age population claiming benefits (2010 – 2018)

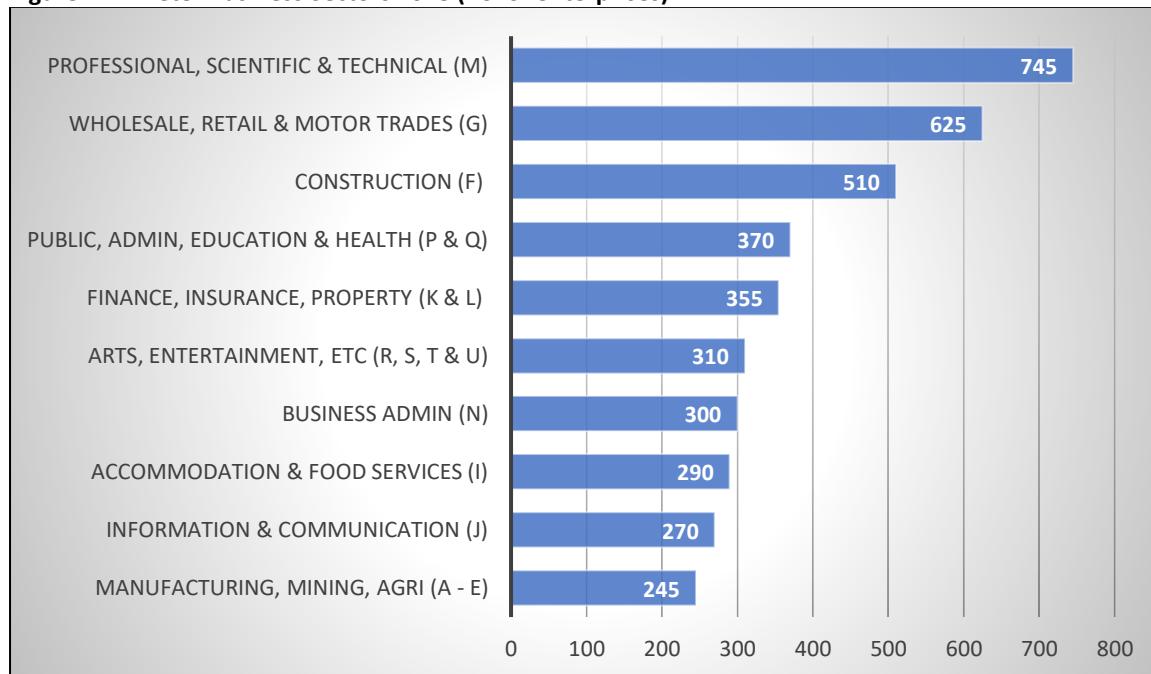
	Exeter	East Devon	Mid Devon	Teignbridge	South West	UK
Nov 2010	11.9%	9.6%	10.0%	11.5%	12.0%	14.3%
Nov 2012	11.6%	9.6%	10.4%	11.5%	12.1%	14.2%
Nov 2014	9.9%	8.8%	9.5%	10.4%	10.8%	12.7%
Nov 2016	8.8%	8.2%	8.9%	9.8%	9.7%	11.0%
<i>Difference (10-16)</i>	-3.1%	-1.4%	-1.1%	-1.7%	-2.3%	-3.3%

Source: DWP Claimant records

Despite this overall improvement in Exeter of a reduction in 3.1% of the working age population claiming benefits, it should be highlighted that there are still some pockets of deprivation within the city. In particular the wards of St David's and Priory, where around 10% of the working age population are still claiming these benefits.

2.4 Business base (number of business enterprises)

The latest Business Register and Employment Survey (BRES) data indicates that Exeter has 4,105 business enterprises, an increase of 600 (17.1%) from 2010. Figure 2.4 shows the distribution of these enterprises between the different main SIC classifications. The largest number of enterprises are found in the professional, scientific and technical sector, accounting for nearly one fifth of all enterprises across the city (18.2%). These are followed in number by enterprises in the wholesale, retail & motor trades (15.2%) and construction (12.4%) sectors.

Figure 2.4: Exeter Business Sectors 2018 (no. of enterprises)

Source: ONS Business Register and Employment Survey

It is noticeable that in many ways the distribution of enterprises shown in the figure is markedly different from the distribution of employees reported in section 2.1. This is because of the varied size of the average number of employees at enterprises in each sector – with, for instance, there being comparatively more enterprises in the wholesale, retail and motor trades (where 13,000 employees work at 625 enterprises = c.20 employees on average) and construction (4,000 employees at 510 enterprises = c.8 employees on average) sectors and fewer enterprises in the public admin, education, health and social work sector (22,000 employees at 370 enterprises = c.60 employees on average).

The number of business enterprises in Exeter has increased by 600 (17.1%) from 3,505 to 4,105 since 2010. Table 2.19 below shows that this growth has been particularly strong in the professional, scientific and technical sector, where there are 235 (+46.1%) new enterprises as well as in the public admin, education, health and social work sector where there are 110 new enterprises (42.3%). The other sectors that have seen substantial increases are information & communication (70 new enterprises), business admin (55 new enterprises) and construction (50). Between them, these five sectors account for 520 (87%) out of the 600 total new enterprises in the city.

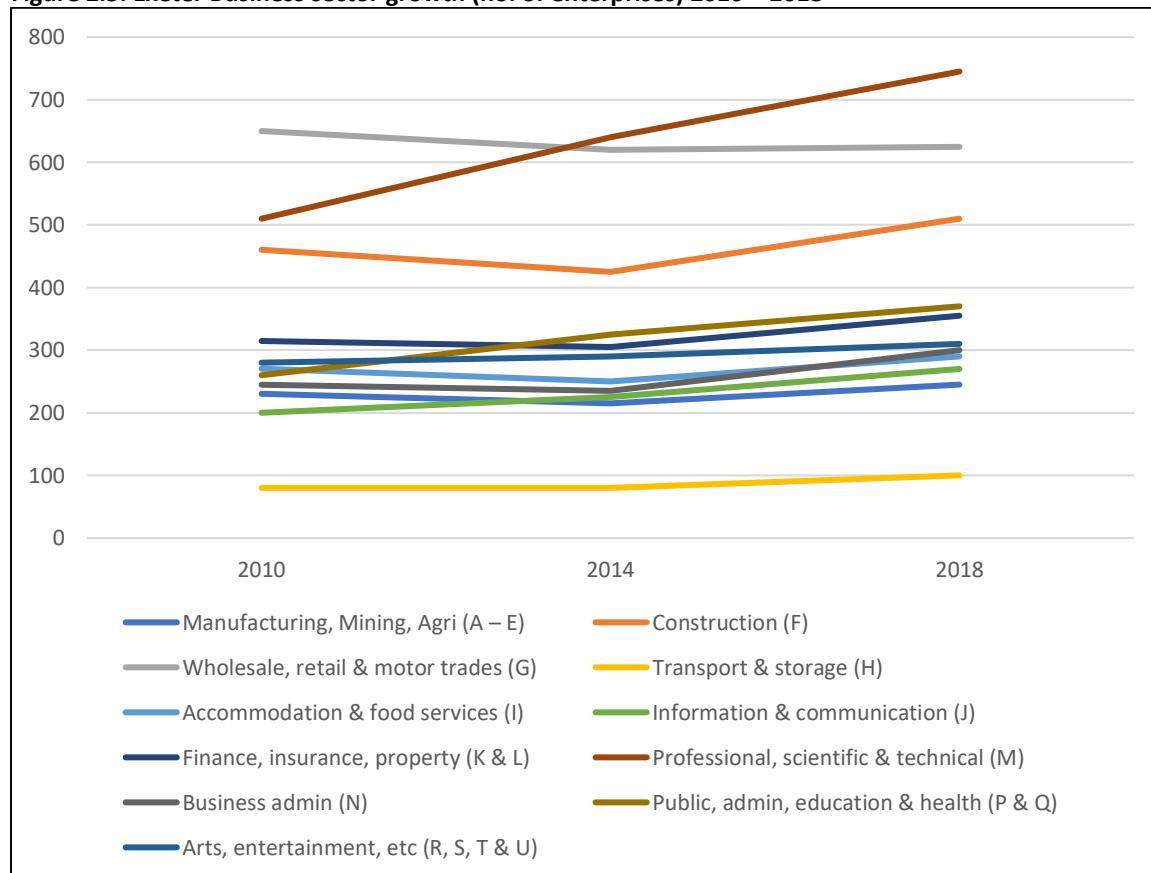
Table 2.19: Exeter Business sector growth (no. of enterprises) 2010 – 2018

	2010	2014	2018	Growth 2010-2018 (%)
Manufacturing, Mining, Agri (A – E)	230	215	245	+15 (6.5%)
Construction (F)	460	425	510	+50 (10.9%)
Wholesale, retail & motor trades (G)	650	620	625	-25 (-3.8%)
Transport & storage (H)	80	80	100	+20 (25%)
Accommodation & food services (I)	270	250	290	+20 (7.4%)
Information & communication (J)	200	225	270	+70 (35%)
Finance, insurance, property (K & L)	315	305	355	+40 (12.7%)
Professional, scientific & technical (M)	510	640	745	+235 (46.1%)
Business admin (N)	245	235	300	+55 (22.4%)
Public, admin, education & health (P & Q)	260	325	370	+110 (42.3%)
Arts, entertainment, etc (R, S, T & U)	280	290	310	+30 (10.7%)
Total business count	3,505	3,600	4,105	+600 (17.1%)

Source: <https://www.nomisweb.co.uk/query/construct/submit.asp?forward=yes&menuopt=201&subcomp=1>

Figure 2.5 below illustrates this different sectoral growth pattern.

Figure 2.5: Exeter Business sector growth (no. of enterprises) 2010 – 2018



It is also worth noting that the 17.1% increase in numbers of enterprises in the city since 2010 is exactly the same proportion as that found across the South West over this time period (17.1%). This proportionate increase is higher than that which has occurred in the surrounding greater Exeter areas, though in Teignbridge and East Devon the actual number of new enterprises created has been higher than in Exeter (705 in both respectively compared with 600). Furthermore, the growth in enterprises in the greater Exeter area and across the South West lags markedly behind the national growth pattern, recorded as +27.7%. Table 2.20 below contains the details.

Table 2.20: Growth in total number of Business Enterprises 2010 – 2018

	2010	2014	2018	Change 2010-2018 (%)
Teignbridge	5,050	5,120	5,755	+705 (14.0%)
Mid Devon	4,135	4,210	4,520	+385 (9.3%)
East Devon	5,680	5,780	6,385	+705 (12.4%)
Exeter	3,505	3,600	4,105	+600 (17.1%)
South West	197,935	207,470	231,745	+33,810 (17.1%)
Great Britain	2,031,845	2,197,000	2,596,320	+564,475 (27.7%)

2.5 Recruitment and vacancies

It is very important to note that this section should be read in conjunction with the findings from the survey of Exeter businesses that is being conducted simultaneously with the collation of this evidence base. This is because the best source of data on this subject is the national Employer Skills Survey⁴ (ESS), which has been conducted every two years since 2011. While the findings from the most up-to-date ESS survey (2017) have recently been produced, they only cover the LEA of Devon and England.

Therefore, this section presents the key findings from the 2017 ESS alongside some supplementary findings from a small-scale survey of Exeter businesses conducted by ECC in 2018 and the *2017 Devon Workforce Skills Survey* produced by Devon County Council. To provide some context to the detail for Devon that follows, it is worth first quoting from the EES main report summary about the changes in the national picture over the last few years:

"Levels of recruitment activity provide an indication of growth and change in the labour market and wider economy. Recruitment activity has continued to grow since 2015, with one in five UK employers (20%) having any vacancies at the time of fieldwork (1% increase from 2015), with these employers reporting a total of just over one million vacancies (1,007,000), a 9% increase on the figure in 2015. Growth in recruitment activity was evident across most of the UK..."

"When employers have vacancies, potential employees are either able and willing to meet employer requirements, or they are not. In line with previous years, a third of vacancies in the UK (33%) were considered hard to fill. When employers struggle to fill vacancies, this is often due to a lack of the required skills, qualifications or experience among applicants. Collectively these are known as 'skill-shortage-vacancies'."

"Although relatively few employers experienced them at the time of the survey... these employers reported a range of impacts resulting from them, including increased workloads for other staff; loss of business or orders to competitors; delays developing new products or services; and difficulties introducing new working practices."

⁴ <https://www.gov.uk/government/publications/employer-skills-survey-2017-england-and-local-toolkit> It is important to note that while the EES is the largest (87,000 employers participated in 2017) and the most authoritative source of data on vacancies and skills needs, the survey only covers businesses with 2 or more employees. Given the high prevalence of one person businesses in Devon, this should be borne in mind when considering the results.

There has been an 8% increase in the number of skill-shortage vacancies compared with 2015: from 209,000 to 226,000. This increase in the number of skill-shortage vacancies was similar to the proportional increase in vacancies, meaning the density of skill-shortage vacancies (i.e. the proportion of vacancies that were hard to fill because of reported skill shortages) has remained stable since 2013.”

The main findings from the 2017 ESS data for Devon indicate that while the proportions of businesses who had recruited in the last year (47%) or had a vacancy at the time of the survey (19%) were almost the same as in England (51% and 20% respectively), in some respects the county has a slightly higher prevalence of recruitment and skills issues than that found across the country. Table 2.21 contains the details which shows that for both hard-to-fill vacancies and skills-shortage-vacancies⁵, Devon had a higher prevalence rate than England as whole. For vacancies and skills gaps⁶ it had the same level.

Table 2.21: Vacancies in Devon and England (% of employment) 2017

	England (%)	Devon (%)	Devon (No.)
Number of vacancies	4%	4%	12,009
Number of hard-to-fill vacancies	1%	2%	5,901
Number of skills-shortage-vacancies	1%	1%	3,539
Number of staff members with skills gaps	4%	5%	16,770

Source: National Employer Skills Survey 2017

What is perhaps equally concerning for the county is that the previous ESS in 2013 reported that Devon had the same or lower levels of prevalence than England. Indeed, not only has the total number of vacancies in Devon nearly doubled from 6,771 in 2013 to 12,009 in 2017, but the number that are hard-to-fill has more than tripled from 1,628 to 5,901. Furthermore, the survey shows that:

- In 2013 there were nearly 1,200 vacancies in Devon that employers could not fill because they could not find applicants with the required skills and that by 2017 this number was 3,539;
- Similarly, in 2013 there were over 13,500 employees in the county who did not have the skills required to perform their current job – by 2017 this had increased to 16,770.

When they were asked about the wider recruitment reasons *why* they had hard to fill vacancies, the Devon employers gave some answers that were markedly different from those given by employers across England. It is important to note the wider reasons given because they demonstrate a range of issues that were often specific to the profile of Devon’s businesses and the associated types of jobs on offer, in relation to the required attitudes and motivation of the applicants.

Table 2.22 overleaf shows that for many of the most common reasons there were marked differences between those reported by Devon businesses and those elsewhere. The table shows that Devon employers were more likely to report the wider reasons for having hard-to-fill vacancies as being:

- Not enough people interested in doing this type of job;
- Low number of applicants with the required attitude, motivation or personality;
- Remote location/poor public transport; or
- Job entails shift work/unsociable hours.

Conversely, Devon employers were less likely to report that the reasons were:

- Low number of applicants with right skills; or
- Lack of work experience the company demands.

⁵ Skills-shortage-vacancies (SSVs) are vacancies that were hard to fill because of a lack of applicants with the required skills.

⁶ Skills gaps exist where employers have employees who lack skills required to perform their current job.

Table 2.22: Main reasons for hard-to-fill vacancies in Devon and England (% of vacancies) 2017

	England (%)	Devon (%)	Difference (+/- %)
Low number of applicants with right skills	38%	28%	-10%
Not enough people interested in doing this type of job	24%	36%	+12%
Lack of work experience the company demands	18%	9%	-9%
Low number of applicants with the required attitude, motivation or personality	16%	25%	+9%
Remote location/poor public transport	11%	23%	+12%
Job entails shift work/unsociable hours	10%	17%	+7%

Source: National Employer Skills Survey 2017

Returning to the national picture, to consider skills-shortage-vacancies, the ESS report states that these types of vacancies were particularly prevalent in certain sectors and occupations:

"They were most numerous in the Business Services sector, though as a proportion of all vacancies in the sector, the density of such vacancies was highest in Construction where over a third of vacancies (36%) were considered skill-shortage vacancies... By occupation, employers were most likely to have experienced skills-related difficulties when recruiting for Skilled Trades positions (such as chefs, electricians, and vehicle technicians). Around two in every five Skilled Trades vacancies were proving hard to fill for skills related reasons (42%). This occupation has had the highest density of skill-shortage vacancies in all previous iterations of the ESS series."

The skills that were most often needed were:

"The skills that employers found to be lacking among applicants ranged across both technical and practical skills, and people and personal skills. On the technical side, employers reported a lack of digital skills, skills related to operational aspects of the role, and a lack of complex analytical skills. The main people and personal skills lacking predominantly related to self-management skills, management and leadership, and sales and customer handling skills."

The Devon Workforce Skills survey 2017⁷ (DWSS conducted in both 2016 and 2017) provided overarching findings that broadly supported these national trends and themes, though it also produced some specific points of interest:

- There was an increase in the number of vacancies being reported by Devon micro businesses, particularly in the Transport and Storage and Education sectors;
- The results in both 2016 and 2017 show that a lack of applicants generally was a very particular concern for Devon. In 2017, the proportion reporting this was more than twice the national average.
- 10% of businesses within the sample have particular jobs in which they are experiencing difficulties retaining staff, which is a 53% increase on 2016.
- Recruitment has increased over the last year in Devon and is significantly higher than the UK 2015 average, with more than two-thirds reporting they recruited in the past year.
- Across the two surveys, basic numerical skills and understanding was the most cited skill priority; and
- Businesses surveyed appear to be increasing their capabilities in digital and technological skills as the amount of respondent businesses stating that it was very important that all or most of their employees had at least some basic knowledge of how to use everyday technology, had significantly declined in the 2017 DWSS.

⁷ 2017 Devon Workforce Skills Survey Final report, Wavehill February 2018

2.6 Forecasts for productivity and employment

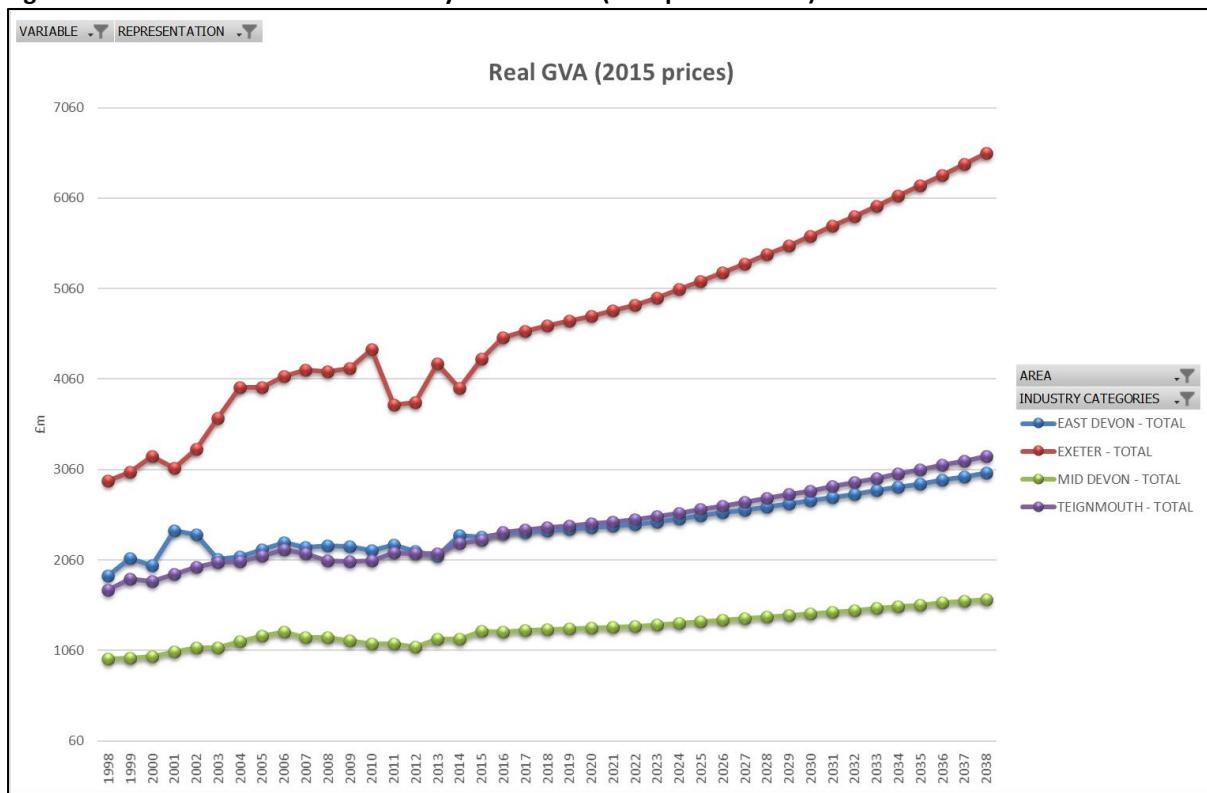
This section presents forecasts for future changes in productivity and employment numbers made using the HotSW Amore Economic model. The following points should be noted about the data:

- The **productivity** data shown in the figures and tables covers a forty-year period from 1998 to 2038, which consists of both “real” data from 1998 up to 2016 and also modelled, forecast data from 2017 onwards to 2038;
- The **employment** data shown in the charts and tables covers the modelled, forecast data up to 2029, with real data from 2016 being used as the base point, because the real data has been provided and discussed in the previous sections of this report;
- Both the productivity and employment forecasts have been provided for Exeter, East Devon, Mid Devon, Teignbridge and Great Britain; and
- The employment numbers shown are based on full-time equivalents (FTEs) – that is, they represent the combined hours worked in part-time jobs to produce an “equivalent” full-time number, based on 30 hours a week. (The data in the previous sector separates full- and part-time jobs into different categories);

2.6.1 Productivity growth and forecasts

Figure 2.6 below shows the pattern of productivity growth in Exeter for the period from 1998 to 2016, during which time it increased by more than 40% from less than £30,000 to over £40,000. While this period of growth was fairly sustained up to 2010, the impacts of the recession thereafter caused some marked dips. However, in the last two years for which real data is available, 2015 and 2016, the average GVA per FTE head has recovered to its 2010 level of over £40,000. The forecast is for steady growth in productivity reaching over £50,000 in 2029 and continuing to over £60,000 in 2038.

Figure 2.6 Real and Forecast Productivity 1998 – 2038 (GVA per FTE head)



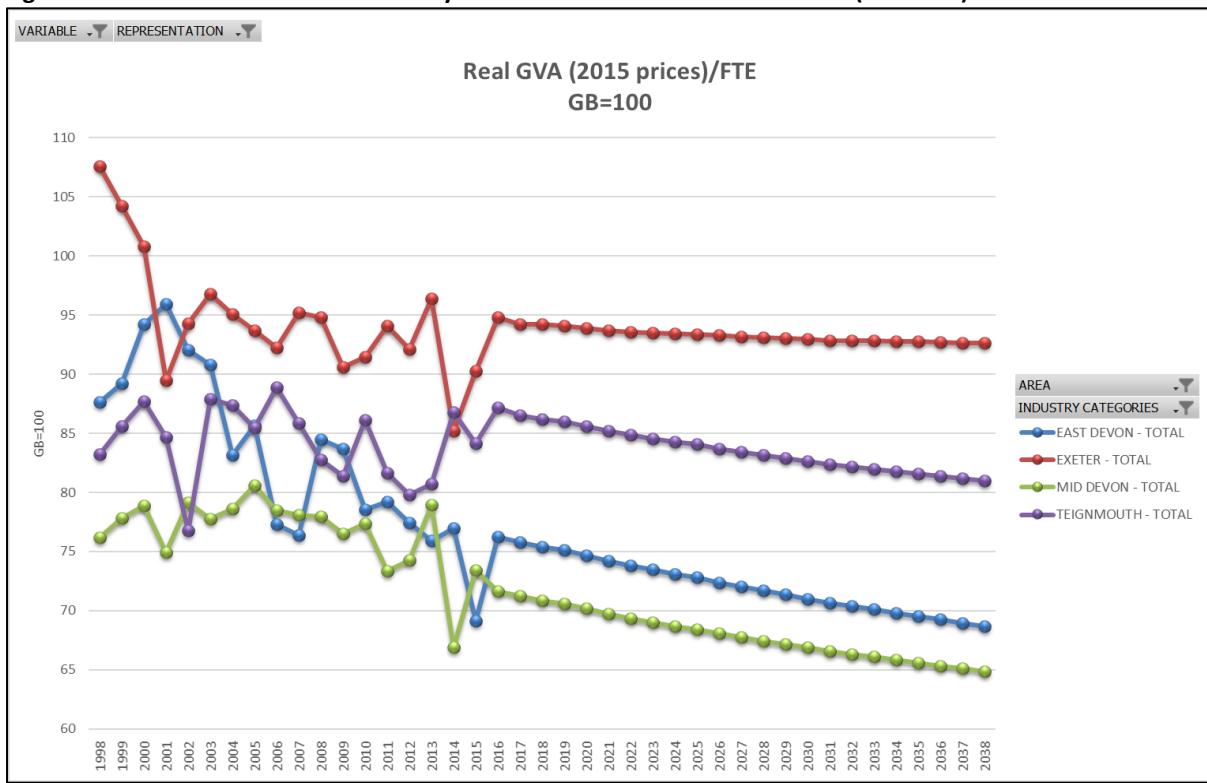
Source: DCC/HotSW Amore Economic model

Figure 2.6 also shows the very marked difference in productivity between Exeter and the surrounding greater Exeter areas – both in terms of its absolute value and the amount that it has increased. Reflecting its occupational and sectoral profile, Exeter's average GVA per FTE head started higher and has increased more. The GVA per FTE head of the three surrounding areas has grown, and is forecast to continue to do so, albeit at a much more modest level.

While these forecasts present a positive picture for the future, in term of growth in productivity, both in Exeter and the greater Exeter area, it is important to contextualise them in relation to the forecast growth across the country. Figure 2.7 presents the historic and forecast productivity figures for Exeter and greater Exeter relative to the GB figure being a “benchmarked” average of 100.

Looking back to 1998, this shows a very different pattern with quite wide fluctuations in comparative growth for each of the four greater Exeter areas. The most noticeable aspect of the figure is that apart from a few occasions in the late 1990s, the ranking for each of the four greater Exeter areas remains consistently below 100, i.e. productivity is increasing, but more slowly than it has elsewhere in GB. Since 2000, Exeter has remained at around 90 – 95% of the national GB figure.

Figure 2.7 Real and Forecast Productivity Growth Relative to GB 1998 – 2038 (GB = 100)



Source: DCC/HotSW Amore Economic model

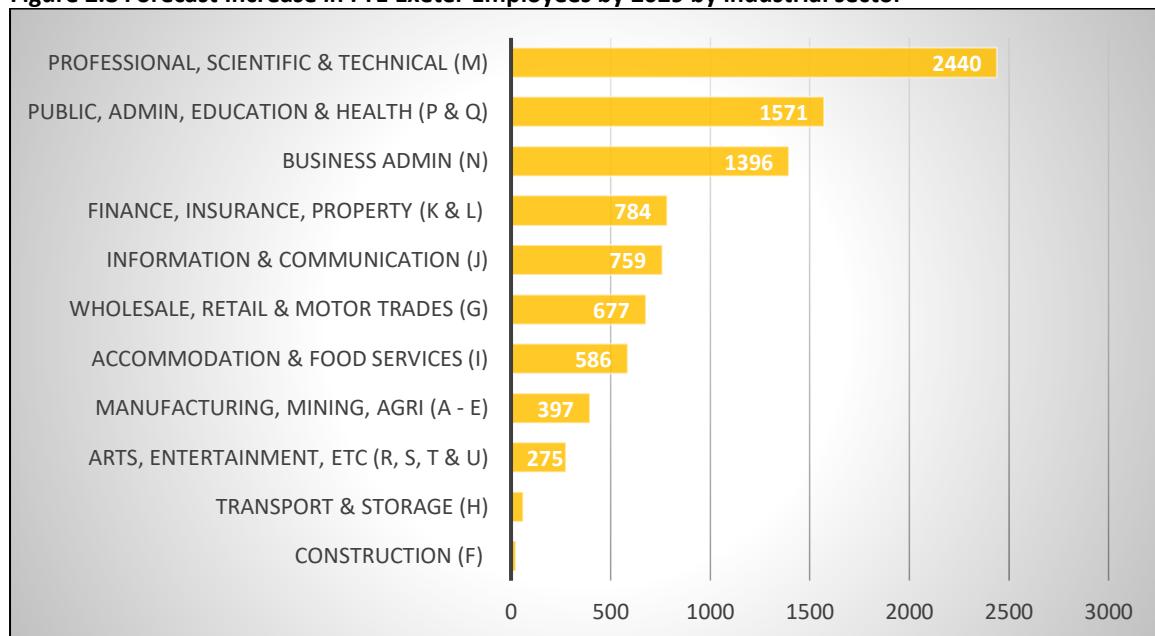
The forecast shows that this pattern will continue to 2038 with the Exeter figure staying between 93% and 95% of the national figure. The forecast figures to 2038 for Teignbridge (c.80% - 85%), East Devon (c.70% - 75%) and Mid Devon (c.65% - 70%) are even further below the national average of 100.

2.6.2 Employment forecasts

Section 2.1.4 presented data about the current employment situation, in terms of the numbers of employees in each major industrial sector. This section presents the forecast data, which indicates that by 2029 there will be 8,972 more FTE employees in Exeter, equivalent to an 11% overall increase. However, most of these jobs are forecast to be in three sectors: professional, scientific and technical (+2,440), human health and social work (+1,483) and business admin and support services (+1,496). Together these sectors account for 60% of the forecast increase in FTEs.

Figure 2.8 below shows the size of the forecast increase in the number of FTE employees in 2029 in the city for each of the major industrial sectors. As well as the extensive growth in the three sectors described above, the figure also shows that growth in the number of FTEs is forecast in finance, insurance and property, information & communication, wholesale, retail & motor trades and accommodation & food services.

Figure 2.8 Forecast Increase in FTE Exeter Employees by 2029 by industrial sector



Source: DCC/HotSW Amore Economic model

Alongside the forecast increase of 8,972 more FTE employees in Exeter (11%), the model also forecasts increases in FTEs in each of the three surrounding areas: Mid Devon = +2,555 (8%), East Devon = +4,569 (9%) and Teignbridge = +4,643 (10%). In each of these three areas, the bulk of the growth is also forecast to be in professional, scientific and technical, human health and social work and business admin and support services FTEs. The other sectors in which significant growth was forecast were:

- East Devon: Accommodation & food service plus Information & communication
- Mid Devon: Wholesale, retail & motor repair; and
- Teignbridge: Accommodation & food service plus wholesale, retail & motor repair.

In total then, the Amore model forecasts that across the greater Exeter area as a whole there will be an increase of over 20,000 FTEs by 2029.

Lastly, it should be highlighted that the different levels of growth in FTEs described above for the Exeter and greater Exeter area should be considered in the overall context of the forecast growth for the nation. The model predicts an increase of +3,235,311 FTEs, which is the equivalent of 11%. While the forecast growth in FTEs in Exeter matches this rate, it should be remembered from the previous section that productivity is not forecast to grow at the same rate as nationally over the period.

3. The Supply of Skills

This section presents an analysis of the available data on the supply of skills in the Exeter and greater Exeter area, together with comparisons with regional and national figures. This analysis has been undertaken to identify the current skills characteristics of the stock of workers in the local workforce in the context of forecast population/workforce changes over the next ten years. This information is central to the process of distinguishing:

- Potential challenges that might restrict the local area from equipping the workforce; and
- Defining changes to the workforce that could affect the availability of the skills needed.

This assessment is then used in section 4 to inform a mapping of likely available skills against those required in the area; and an assessment of the types and causes of any identified skills gaps.

3.1 Population and labour supply

3.1.1 Current population and labour supply

Table 3.1 summarises the current position of the population and labour market in Exeter and its neighbouring local authorities, referred to in this section as Greater Exeter. In 2017, the population of the city was 128,900 while that of Greater Exeter stood at 483,000. The working age population was 288,000 (59.7%), which was below the national average (63%) and ranging from as low as 58% in Mid Devon and Teignbridge, to 60% in East Devon and 62% in Exeter City. Conversely, economic activity is higher than average at 81% of the 16 to 64 population (78% UK). Mid Devon has highest economic activity rates in the area at 85%.

Table 3.1 Population and economic activity (2017)

	Exeter	East Devon	Mid Devon	Teignbridge	SW	UK
Total	128,900	142,300	80,600	131,400	5,559,300	66,040,200
Aged 16-64	88,800 (68.9%)	80,300 (56.4%)	50,400 (62.5%)	77,900 (59.3%)	3,370,800 (60.6%)	41,545,600 (62.9%)
Economic activity	70,600	63,500	42,600	63,100	2,877,000	33,906,000
- Employees	- 52,600	- 49,000	- 33,000	- 50,900	2,787,000	32,535,000
- Self-employed	- 13,900	- 13,000	- 8,000	- 10,100	(in. s/em)	(in. s/em)
- Unemployed	- 2,000	- 1,300	- 900	- 1,400	91,000	1,372,000
- Other	- 2,100	- 200	- 700	- 700	(in. ot'er)	(in. ot'er)
Economically inactive	18,200	16,800	7,800	14,800	493,800	7,639,600
- Students	- 7,800	- n/a	- n/a	- n/a	- 127,900	- 2,062,700
- Other (sick, Carers, etc)	- 10,400	- +12,000	- n/a	- n/a	- 365,900	- 5,576,900

Source: ONS Annual Population Survey: Oct 2017 – Sept 2018 / Labour Force Survey 2018

As noted in the previous section, the urban centre of Exeter serves as a focus for employment in the Greater Exeter wider area. According to the Business Register and Employment Survey, Exeter had an employment level of 95,000 compared to 48,000 in East Devon and Teignbridge, and 29,000 in Mid Devon. It also provides a different profile of jobs, in terms of their industrial sector.

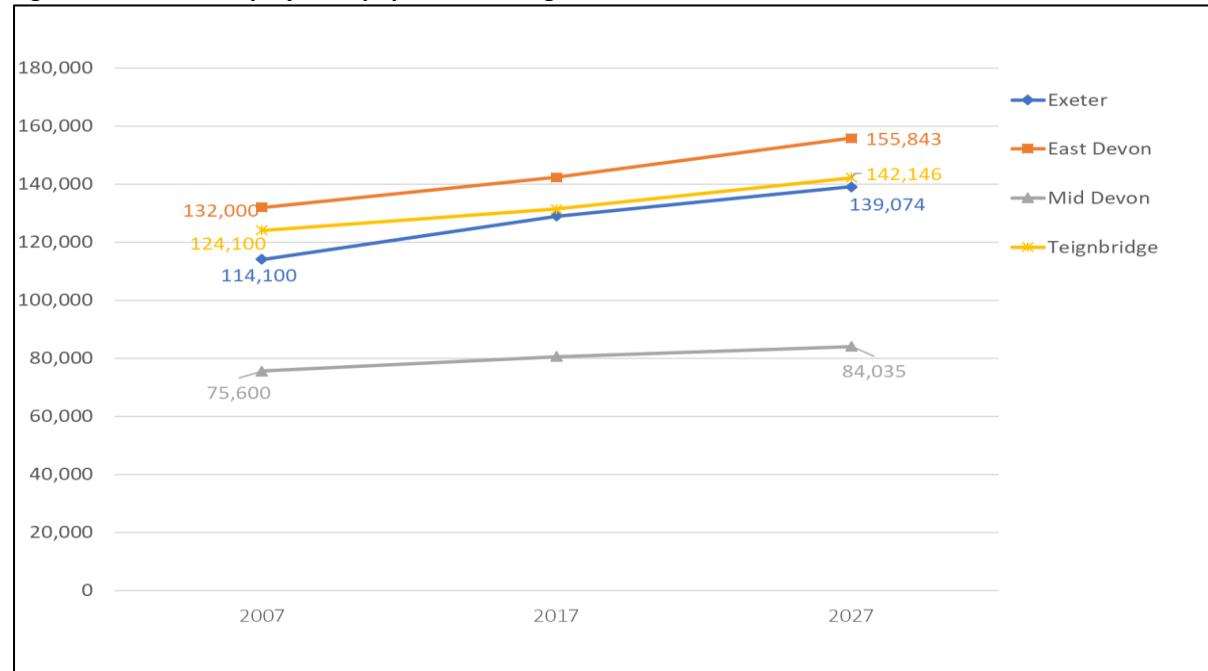
Nine out of ten of Exeter jobs are based in the Services Sector (90%), with relatively large proportions across Health (17%) and Education (11%), and about a quarter across Professional, Admin and Financial Services, reflecting the city's role in hosting major services for the wider area.

In contrast, more than a third of jobs in Mid Devon are in agriculture/production – Agriculture, Manufacturing, Construction and Utilities – 35% compared to 18% regionally and 15% in England. 12% of jobs are in agriculture and 14% in manufacturing, bringing specific and different skills needs compared to the wider area. East Devon and Teignbridge have similar distributions, both more reliant on agriculture (6% vs 1% national average) and upon the retail and accommodation sectors (31% combined), reflecting the importance of tourism and leisure to these areas.

3.1.2 Population forecasts and labour supply

The population of Exeter is forecast to increase to 139,074 by 2027, while across the whole Greater Exeter area it is projected to have grown from 446,000 in 2007 to 521,000 in 2027, growth of 17% (0.8% per annum). See Figure 3.1 for the details.

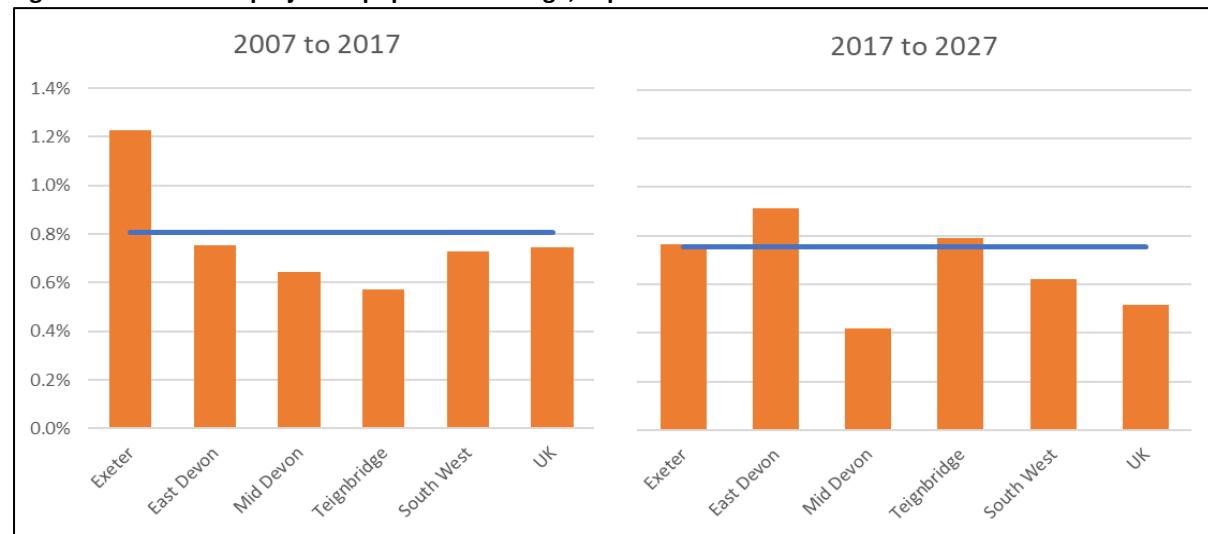
Figure 3.1 Actual and projected population change, 000s



Source: Mid-year population estimates, ONS; Population projects, ONS

Much of the growth across the Greater Exeter area has been driven by the expansion of the city of Exeter over the decade up to 2017, with Mid Devon and Teignbridge growing at a lower rate than the national average, and East Devon broadly matching the regional and national averages of 0.7% (see Figure 3.2). Whilst growth of East Devon and Teignbridge is projected to increase in the next decade, Exeter and Mid Devon grow at a slower rate than before, with Exeter still outstripping the region and England, but Mid Devon slower.

Figure 3.2 Actual and projected population change, % per annum



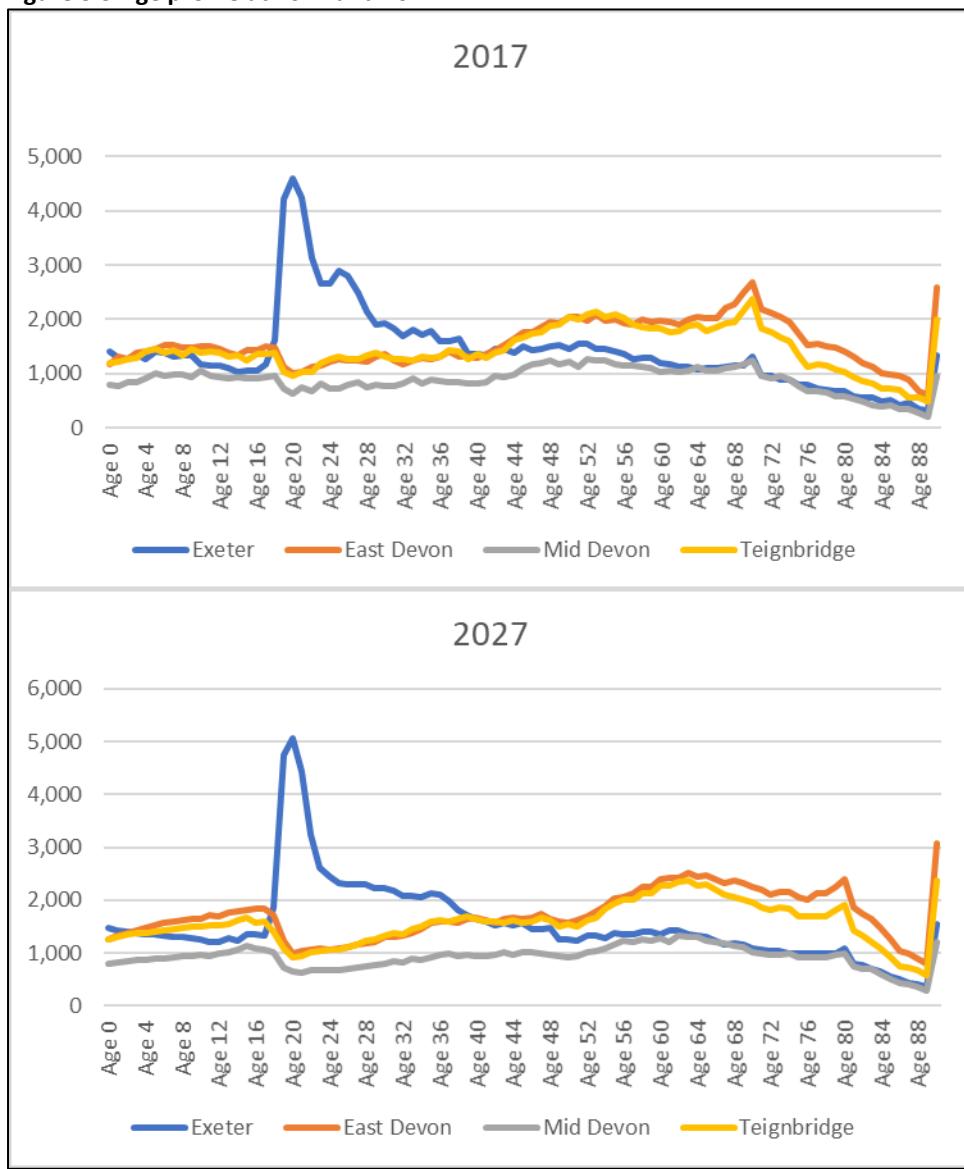
Source: Mid-year population estimates, ONS; Population projects, ONS

Figure 3.3 shows the age profile of each LA area within Greater Exeter at 2017 and 2027. This shows the substantial boost to the city's population for 19- to 21-year olds at both time points due to the draw of the University and other education and training providers. There is a corresponding, though smaller, drop in this age group across the other areas as young people leave home to seek education and employment. This drop is compounded in 2027 by other demographic factors.

The 50- to 60-year old population in 2017 in the three LA areas outside of the city is relatively large compared to younger generations reflecting the influx of work-related migration in preceding years – these shift to the right in 2027. As people will be working longer, this may not substantially impact upon the workforce until the following decade.

The peak of “baby boomers” at age 70 in the top chart can also be seen to move to the right – although this generation is now outside of the working age group, this peak has consequences for skills needs and service implications and opportunities over the next decade and beyond.

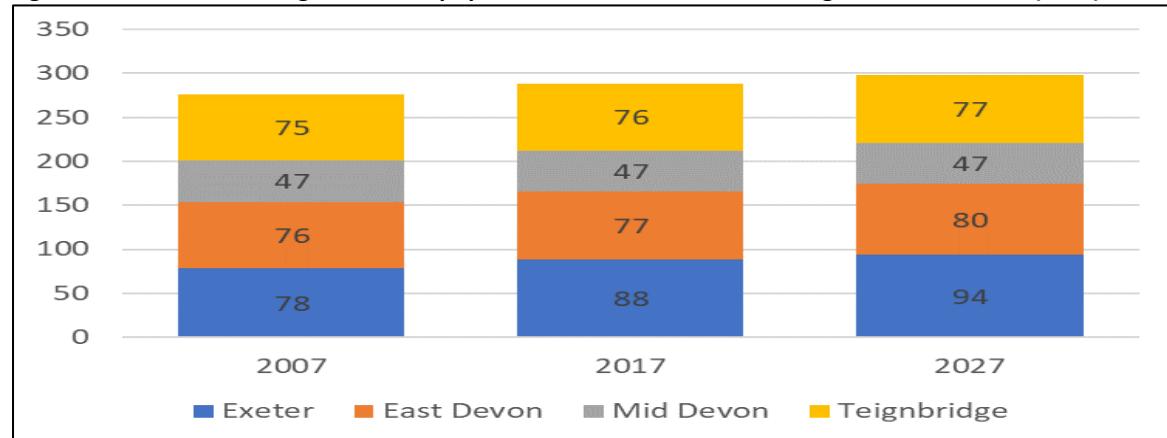
Figure 3.3 Age profile at 2017 and 2027



Source: Population projections, ONS

In terms of the available labour force, the Greater Exeter population grew from 276,000 in 2007 to 288,000 by 2017 (0.4% per annum), with projected growth to 299,000 expected over the next decade up to 2027 (0.3% per annum) – see Figure 3.4. This is dwarfed by growth in the aged 65+ population which grew at 2.1% per annum from 2007 to 2017 and is projected to continue rapidly expanding at 1.4% per annum to 2027.

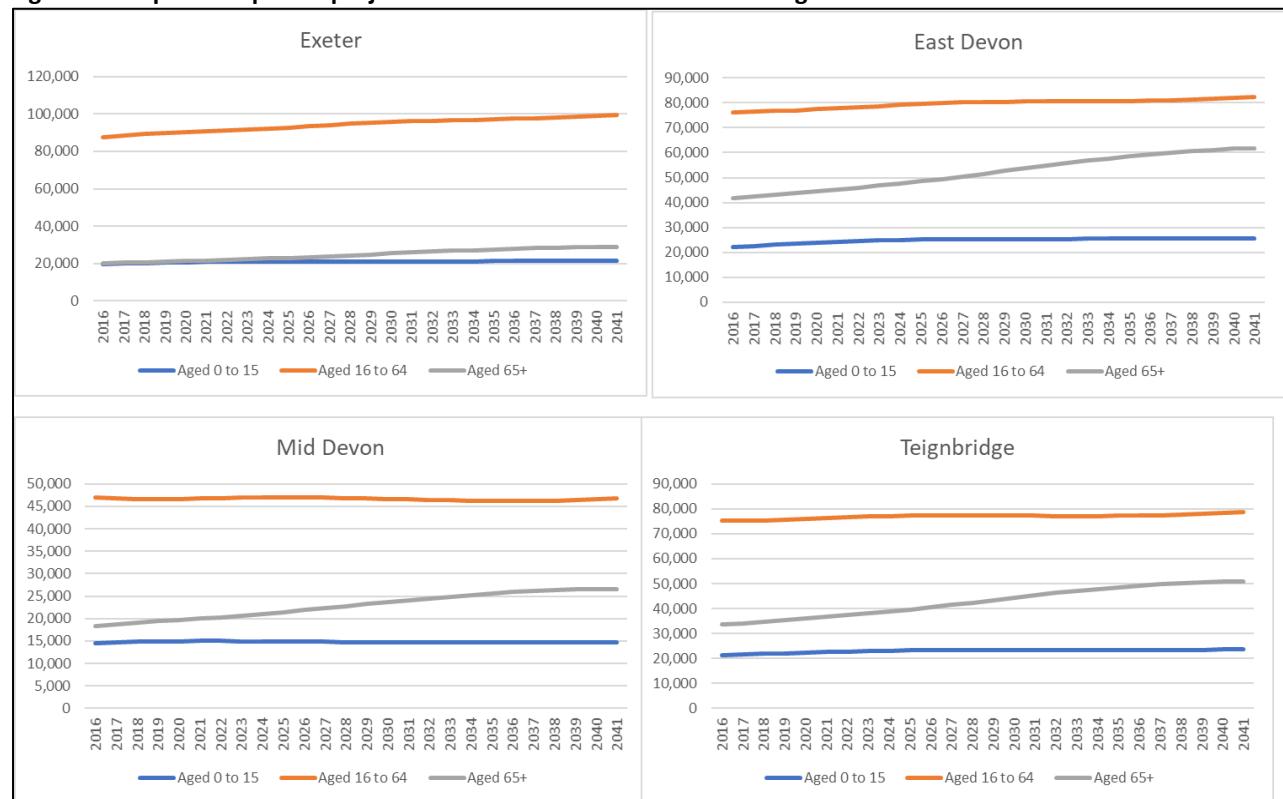
Figure 3.5 – Trend in the aged 16 to 64 population: Exeter and surrounding Local Authorities (000s)



Source: Mid-year population estimates, ONS; Population projections, ONS

A comparison of this demographic shift for each of the four local authority areas to 2041 is shown in Figure 3.6. The working age population is projected to grow in Exeter and in East Devon to a lesser extent, whilst remaining relatively stable in the other two areas. Supply of new workers from the young population is relatively stable. There is a substantial increase across all areas in the age 65+ population – 22,000 by 2027, 54,000 by 2041.

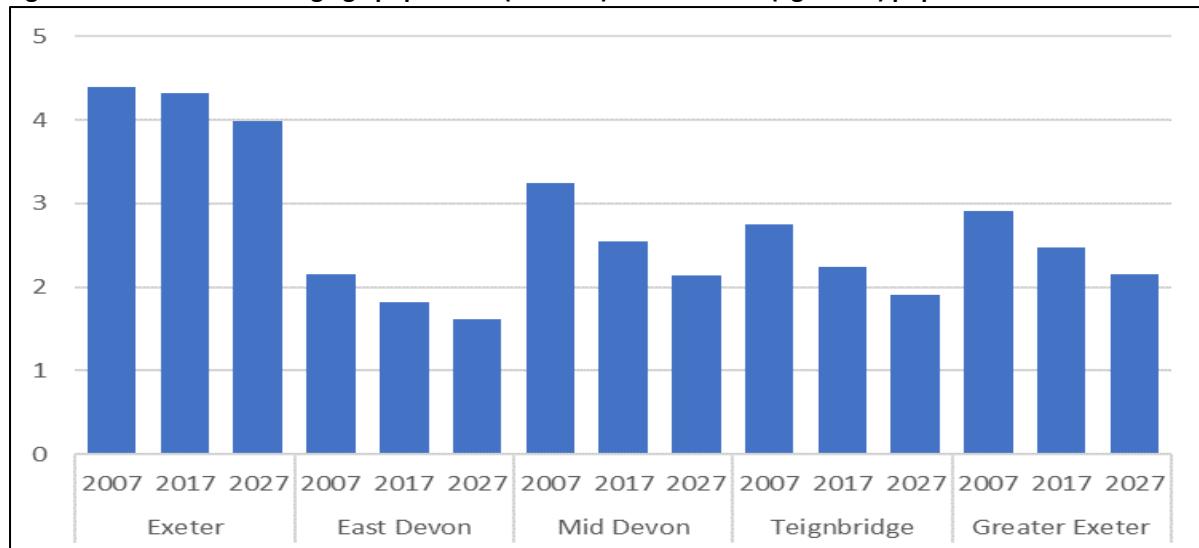
Figure 3.6 Population profile projection to 2041: Exeter and surrounding Local Authorities



Source: Mid-year population estimates, ONS; Population projections, ONS

This shift in demographics is summarised in Figure 3.7 below which shows the ratio of working age population to retired population. The number of people of working age for every retired person has decreased over the period 2007 to 2017 in all areas but with substantial variation. In 2017 there were above 4 working age people per retiree, compared to fewer than 2 in East Devon. The projections indicate that these ratios are set to decrease further – to 3 in Exeter and less than 2 in East Devon. This demographic shift has key implications for skills requirements across several sectors, and skill shortages may be exacerbated by fall out from Brexit.

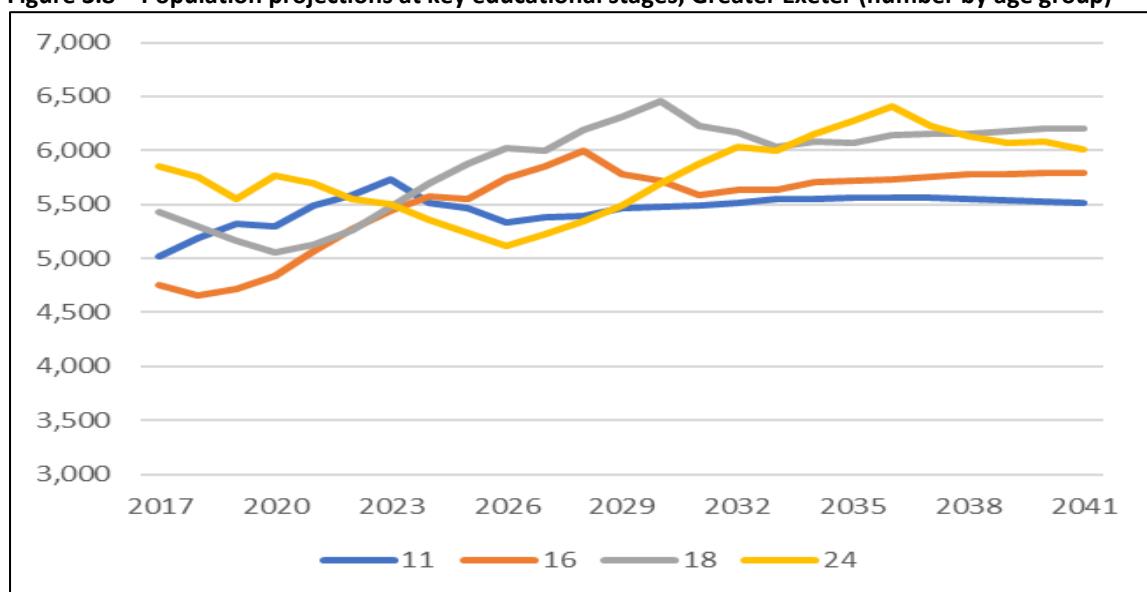
Figure 3.7 – Ratio of working age population (16 to 64) to the retired (aged 65+) population



Source: Mid-year population estimates, ONS; Population projects, ONS

Figure 3.8 shows projections for the population at each key stage of education and so examines the potential to train and replace the workforce over the next 25 years. The fall in 18-year olds is currently playing out in the Higher Education sector with consequent problems in student recruitment (and HE finance) – this may also signal potential issues with refreshing the workforce over the next five years. This will be alleviated in the medium term as 11 and 16 year olds are projected to increase in number to 2023 but the modelling suggests potential issues again with supply beyond 2030.

Figure 3.8 – Population projections at key educational stages, Greater Exeter (number by age group)



Source: Population projects, ONS

3.2 Educational attainment

Table 3.2 shows the educational attainment levels of the current working age population in Exeter and the surrounding area. Exeter has a very highly qualified working age population, with over half of 16 – 64 years old residents (51.4%) being qualified to NVQ 4 level or above. This figure compares with around two fifths of the population nationally (38.4%) and regionally (39.0%), reflecting the attractiveness of the city's businesses and employers, including the University to those with professional skills and qualifications. Indeed, The Centre for Cities reports that Exeter's working age population are the fifth most highly qualified (51.4%) in the UK after Oxford (63.0%), Cambridge (58.1%), Edinburgh (57.8%) and Aberdeen (51.7%).

It is interesting to note though that the difference between Exeter and the surrounding areas continues through each of the qualification levels and very much reflects the resident's occupational profile. The city also has a lower proportion of working age residents with no qualifications (c.3.1% compared with 7.7% nationally).

In terms of the other Greater Exeter LAs, East Devon and Teignbridge are relatively well skilled compared to the regional and national averages. Mid Devon lags behind on skills, with the lowest proportion at all levels above A-level (NVQ2). This will impact on the ability of this population to adapt to economic shifts or to benefit from arising opportunities.

Table 3.2 Qualifications of resident population aged 16-64 (%)

	Exeter	East Devon	Mid Devon	Teignbridge	SW	UK
NVQ 4 and above	51.4	41.8	31.4	43.0	39.0	38.4
NVQ 3 and above	68.1	64.2	53.6	63.9	60.3	57.0
NVQ 2 and above	84.9	79.1	78.6	82.7	79.0	75.4
NVQ 1 and above	94.3	89.3	92.2	91.7	90.1	85.2
Other qualifications	c.3.0	4.7	c.3.6	c.4.0	4.9	7.1
No qualifications	c.2.7	6.0	c.4.2	c.4.3	5.0	7.7

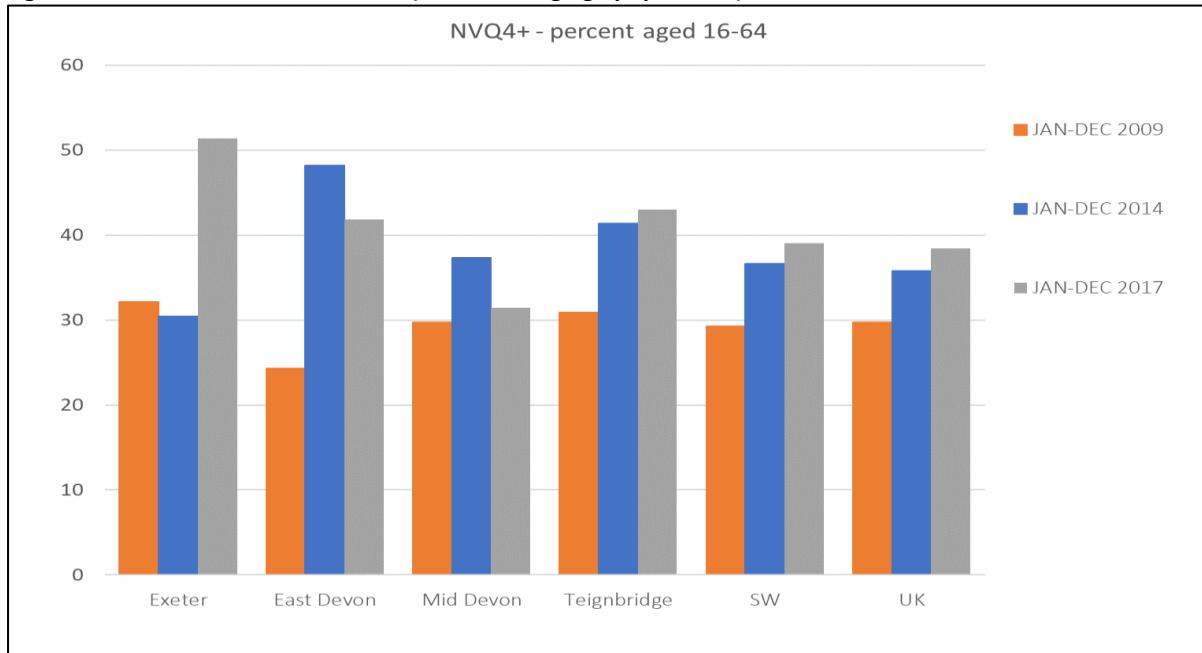
Source: ONS Annual Population Survey: Jan 2017 – Dec 2017

Table 3.3 shows the trend in qualifications over time. There has been a general up-skilling across the area, reflecting a national and regional trend. The table and figure 3.9 overleaf demonstrate how the proportion of Exeter residents with NVQ 4 or above qualifications has increased dramatically since 2009 (by 19.3% - more than double the national increase in the same period). East Devon has also seen a similar increase over this period (+17.5%) and Teignbridge a slightly lesser one (12.1%), though Mid Devon has remained virtually static (+1.7%).

Table 3.3 NVQ level 4 and above over time (2009 – 2017)

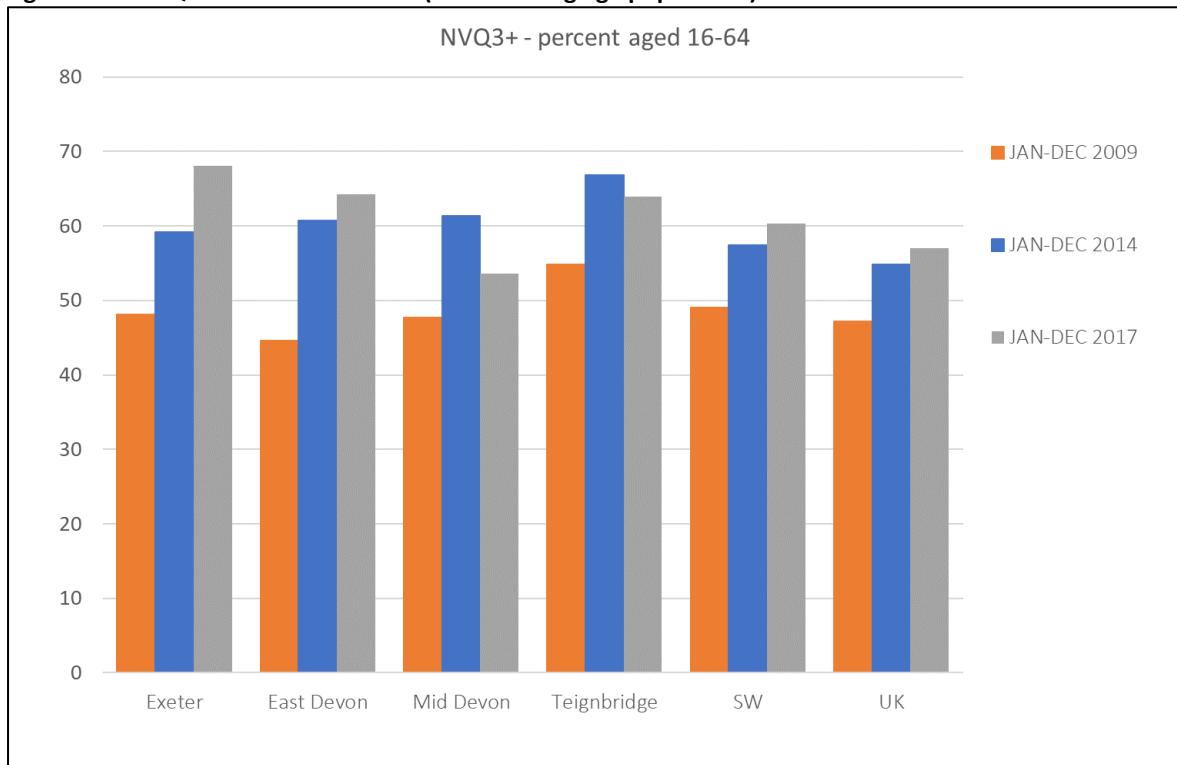
	Exeter	East Devon	Mid Devon	Teignbridge	SW	UK
Jan 09 – Dec 09	32.1	24.3	29.7	30.9	29.3	29.9
Jan 14 – Dec 14	30.4	48.2	37.3	41.4	36.6	36.0
Jan 17 – Dec 17	51.4	41.8	31.4	43.0	39.0	38.4
<i>Change (between 2009 – 2017)</i>	+19.3	+17.5	+1.7	+12.1	+9.7	+8.5

Source: ONS Annual Population Survey 2009 – 2017

Figure 3.9 NVQ Level 4 2009 to 2017 (% of working age population)

Source: ONS Annual Population Survey: Jan 2017 – Dec 2017

Figure 3.10 below show the comparable data for NVQ 3 qualifications and above and demonstrates that Exeter has also had greater growth at this level than the national or regional averages, as have East Devon and Teignbridge.

Figure 3.10 NVQ Level 3 2009 to 2017 (% of working age population)

Source: ONS Annual Population Survey: Jan 2017 – Dec 2017

3.2.1 Key stage 4

Key Stage 4 (KS4) refers to the two years of school education which incorporate GCSEs, and other examinations, in maintained schools in England normally known as Year 10 and Year 11, when pupils are aged between 14 and 16. The English Baccalaureate (Ebacc) is a school performance indicator linked to GCSEs. It measures the percentage of students in a school who achieve 5+ 5-9 (formerly, A*-C) grades in traditional academic GCSE subjects (to include English, maths, a science, one of history or geography, an ancient or modern foreign language, and one additional GCSE-level qualification).

Table 3.4 below shows the performance of students in the Exeter area at GCSE level, including Ebacc metrics and destination following this period of education. 4,239 pupils in the Greater Exeter completed KS4 in 2017/18, the majority (95%) going onto education or employment. Overall, 41% of pupils achieved Grade 5 or above in English and maths GCSEs, slightly below the regional and national averages (43%) – although it is important to note that Exeter, Central Devon and Newton Abbot are well below the national average at 36% to 38%.

The same pattern is observed in the Attainment 8 score. However, the Ebacc average is well above the national and regional averages, as are A-level results (see below), suggesting two levels of skills within the KS4 population. Those that are able to continue to A-level – as indicated by the Ebacc – perform relatively strongly compared to average, but those less likely to proceed to A-level may enter Further Education or employment relatively less skilled. This has consequences for the local labour market. Exeter performs least well with only 78% of pupils remaining in education after KS4.

Table 3.4 – Key Stage 4 attainment, 2017/18

	Number of pupils at end of key stage 4	Entering Ebacc	Staying in education or entering employment (2016 leavers)	Grade 5 or above in English & maths GCSEs	Attainment 8 score	EBacc average point score
Exeter	883	32%	91%	36%	41.6	4.44
Central Devon	414	51%	96%	38%	44.3	3.99
East Devon	1,124	28%	96%	45%	46.1	4.30
Newton Abbot	846	33%	95%	36%	43.7	3.99
Tiverton & Honiton	972	29%	95%	47%	50.8	5.24
Greater Exeter	4,239	32%	95%	41%	45.6	4.41
South West	49,425	36%	95%	43%	46.7	4.06
England - state-funded schools / colleges	523,626	38%	94%	43%	46.5	4.04
England - all schools / colleges	583,617	35%		40%	44.5	3.85

Source: Secondary school performance tables, gov.uk.

Because of the low overall attainment 8 score for Exeter, it is worth looking at the performance figures for individual secondary schools in the city. The figures below show the attainment 8 performance at the end of key stage 4 for each school, relative to the national average between 2016 and 2018. This shows that while West Exe school has improved its performance each year, and St James has remained reasonably consistently above average, Isca, St Peter's and St Luke's have all declined.

Secondary school	2016	2017	2018	Difference (+/-)
West Exe School	-0.2	-0.06	+0.19	+0.39
St James School	+0.26	+0.16	+0.19	-0.05
St Peter's CoE School	+0.37	+0.29	+0.12	-0.25
Clyst Vale Community College ⁸	-0.15	-0.15	-0.03	+0.12
Isca	+0.27	+0.48	-0.23	-0.5
St Luke's Science and Sport College	-0.21	-0.14	-0.61	-0.4

⁸ Clyst Vale is located in East Devon District Council area, but a significant number of the students are Exeter residents.

Table 3.5 shows the destinations of students at the end of Key Stage 4. 95% are in sustained education or employment the following year, with 86% in Greater Exeter remaining in education. This ranges from 78% in Exeter to 88% in East Devon, with destination not sustained 8% in Exeter to 3% in Central Devon. Students in Exeter are more likely to be in employment or apprenticeship than the other areas (13% vs 9% Greater Exeter and South West).

Table 3.5 – Destination of KS4 pupils, 2017/18

Parliamentary constituency	Number of students	Percentage of students with activity recorded in 2016/17 as:				
		Any sustained education or employment	Any sustained education destination	Sustained apprenticeship	Sustained employment destination	Destination not sustained
Central Devon	705	96	87	7	2	3
East Devon	1,155	96	88	6	2	4
Exeter	690	91	78	7	6	8
Newton Abbot	865	95	87	5	3	4
Tiverton and Honiton	890	95	86	5	3	4
Greater Exeter	4,305	95	86	6	3	4
South West	51,475	95	86	6	3	4
England	530,545	94	86	5	3	5

Source: Key stage 4 and multi-academy trust performance 2018, gov.uk

3.2.2 Key stage 5 (16-18)

Table 3.6 summarises A level performance across the Greater Exeter area. Data are only readily available at Parliamentary Constituency and County level. This covers students at the end of advanced level study who were entered for at least one A/AS level, applied single A/AS level, applied double A/AS level or combined A/AS level during 16-18 study.

2,433 students sat A level examinations (A/AS levels) in 2016/17 in the Greater Exeter area. On average they achieved a point score of 33.5, equivalent to grade C+. 17.9% (of 1,865) of students sitting at least 1 A-level achieved AAB or better – this is higher than the regional and national average. This figure varies widely across the Exeter area from 7% and 9% in Newton Abbot and East Devon, respectively to 41% in Tiverton and Honiton constituency, skewed by Blundell's and Colyton Grammar accounting for more than 80% of A-level students.

Table 3.6 – Key Stage 5 attainment, 2017/18

	Number of students	Average results		Number of students entered for 1 or more A-	Points for student's best 3 A levels		Achieving AAB or higher in at least 2 facilitating subjects*
		Point score	Grade		Point score	Grade	
Exeter	1,156	34.9	C+	880	36.0	B-	19.7%
Central Devon	333	32.5	C+	266	32.6	C+	12.8%
East Devon	363	29.9	C	304	28.6	C	8.6%
Newton Abbot	330	28.5	C	204	27.0	C-	6.9%
Tiverton & Honiton	251	40.8	B	211	41.9	B	41.2%
Greater Exeter	2,433	33.5	C+	1,865	34.0	C+	17.9%
South West	25,525	32.1	C+	19,040	32.5	C+	14.0%
England - state-funded schools / colleges	263,436	32.1	C+	199,962	32.5	C+	13.7%
England - all schools / colleges	299,420	33.3	C+	230,124	33.6	C+	16.2%

*of students sitting more than one A-level

Source: Secondary school performance tables, gov.uk.

3.2.3 A Level STEM subjects

Table 3.7 shows the share of A-level attainments in Devon versus national and regional averages that were within STEM subjects in 2015/16. Devon had a slightly lower share of A-levels in STEM subjects, particularly in mathematics and chemistry. Physics ahead.

Table 3.7 – A-level attainments in STEM disciplines, 2015/16

	England	South West	Devon
All STEM	32.7%	32.2%	31.7%
Biological Sciences	7.3%	7.2%	7.5%
Chemistry	5.9%	5.1%	5.0%
Physics	3.9%	4.4%	4.5%
Other Science	0.5%	0.9%	1.1%
Mathematics	10.3%	9.7%	8.9%
Further Mathematics	1.6%	1.8%	2.1%
Design and Technology	1.4%	1.8%	1.4%
Computing	0.8%	0.9%	0.8%
ICT	0.9%	0.5%	0.5%

Source: Number of A level examination entries, A*-A grades and A*-E grades by state-funded students, gov.uk

3.3 Destinations following key stage 5

Table 3.8 summarises the destinations of students at the end of key stage 5 in the 2015/16 academic year in the Greater Exeter area, regionally and nationally. 2,980 students were counted as part of the key stage 5 cohort at the end of 2015/16 in the Greater Exeter Parliamentary Constituencies (state-funded schools and Colleges). Of these 88% on average were in a sustained destination (sustained for at least two terms) when assessed in 2016/17 split as 50% in education, 8% in an apprenticeship and 31% in employment. 38% had gone onto Higher Education.

There is variation across the local area – 92% in Honiton and 64% still in education, 58% at University. This cohort fared least well in Exeter – 87% in sustained education or employment, 36% in Higher Education. 11% had not sustained education or employment, somewhat higher than the regional and national average of 8%, suggesting some mismatch of skills and employment opportunities.

Table 3.8: Parliamentary constituencies: Student destinations after key stage 5 (state-funded mainstream schools and colleges) - 2016/17 destinations for the 2015/16 cohort

Parliamentary constituency	Number of students	Percentage of students with activity recorded in 2016/17 as:									
		Any sustained education or employment destination	Any sustained education destination	Education destinations				Sustained apprenticeship	Sustained employment destination	Destination not sustained	Activity not captured in the data
				Further education (level 3 and below)	Higher education (level 4 and above)	Of which: all other HEIs, HE alternative	Other education destinations				
Central Devon	265	88	52	7	38	23	7	7	29	8	4
East Devon	415	87	48	5	36	22	7	8	32	11	2
Exeter	1,815	88	48	11	36	25	1	8	32	9	3
Newton Abbot	275	91	54	3	41	29	10	6	30	8	1
Tiverton and Honiton	210	92	64	3	58	18	4	6	23	5	3
Greater Exeter	2,980	88	50	9	38	24	3	8	31	9	3
South West	35,720	89	53	9	41	27	3	7	29	8	3
England	372,255	89	61	7	50	34	3	6	22	8	4

Source: Destinations of KS4 and KS5 pupils 2017: Key stage 5 local authority and parliamentary constituency tables, Gov.UK

3.4 Young People not in education, training or employment (NEET)

Table 3.9 shows the number and proportion of young people not in education, employment or training (NEETs) in the Exeter city area. In 2018, 177 young people were classed as NEET in Exeter, 5.4% of the 16 to 24 population. This represents a substantial fall in volume (47% decrease) from 2014 and percentage but still represents more than 5% of the 16 to 24 age group.

Table 3.9 – NEET population across Exeter, 2014 to 2018 (number and %)

	Jan-18		Jan-17		Jan-16		Jan-15		Jan-14	
	Cohort	NEET (%)								
EX1	583	(4.6%)	575	(4.9%)	605	(4.8%)	604	(4.6%)	598	(4.7%)
EX2	1232	(5.0%)	1272	(5.3%)	1307	(5.6%)	1291	(6.0%)	1276	(8.3%)
EX3	86	(2.3%)	78	(0.0%)	72	(1.4%)	79	(3.8%)	81	(3.7%)
EX4	1347	(6.4%)	1435	(7.9%)	1480	(7.0%)	1422	(8.1%)	1408	(8.7%)
Total	3248	(5.4%)	3360	(6.2%)	3464	(5.9%)	3396	(6.6%)	3363	(7.7%)
Devon	23752	(4.0%)	24163	(4.0%)	24808	(4.0%)	24838	(4.1%)	24776	(5.3%)

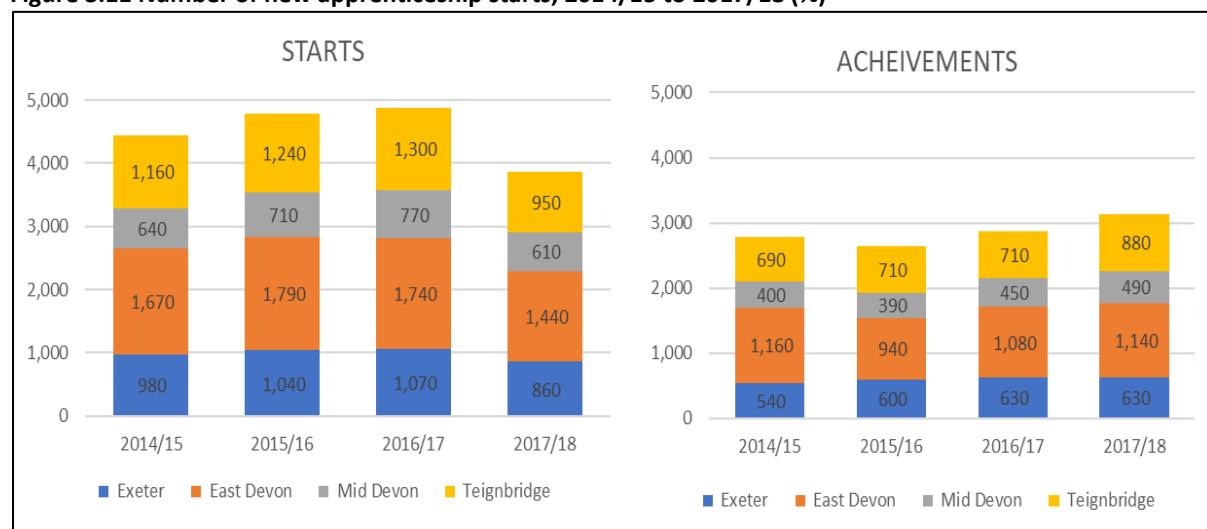
Source: CSW, via Exeter City Council

3.5 Apprenticeships

As shown in figure 3.11 below, the number of new apprenticeships fell sharply in 2017/18 following the introduction by Government of an apprenticeship levy. The local fall reflects the regional and national picture. This represents a 20% fall in the Greater Exeter in one year and 1,020 fewer apprenticeships. Although this average of 20% is lower than the national average (24%), the change ranges from 17% in East Devon to 27% in Teignbridge.

The fall in starts is not yet reflected in the number of achievements and it is probable that numbers will follow the pattern shown in the columns headed “achievements” part of figure xx, increasing again in 2018/19 before slumping in 2019/20.

Figure 3.11 Number of new apprenticeship starts, 2014/15 to 2017/18 (%)



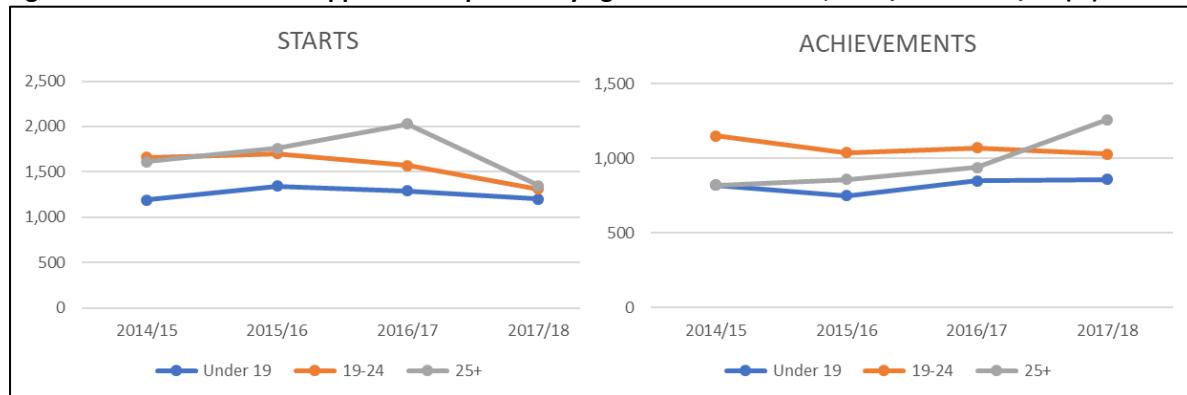
Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

Apprenticeships across the Greater Exeter area were more likely to be completed compared to regionally and nationally – achievements in 2016/17 and 2017/18 were 64% and 66% of the number of starts two years earlier in Greater Exeter, compared to 56% in the South West and 54%-55% in the United Kingdom.

Age

The age distribution of apprenticeship starts and achievements is consistent across geographies. Figure 3.12 shows the Greater Exeter numbers, with a shift to older apprentices in 2016/17, dropping off in 2017/18. The number of achievements in the 25+ group had started to increase in 2017/18.

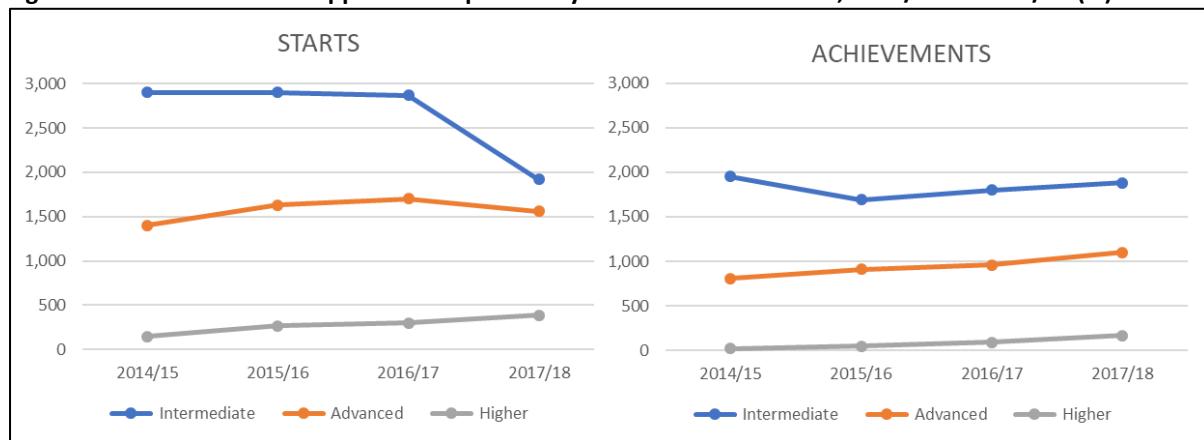
Figure 3.12 Number of new apprenticeship starts by age and achievement, 2014/15 to 2017/18 (%)



Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

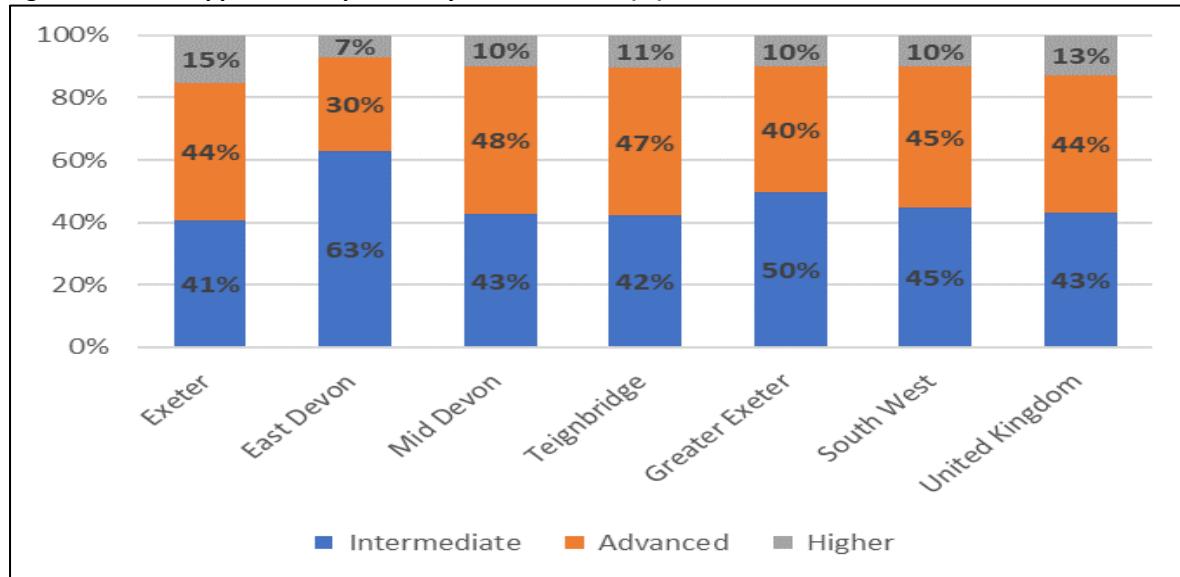
The drop off in apprenticeship starts mainly affects those in intermediate apprenticeships, the first level of apprenticeship (equivalent to 5 good GCSEs). As such, those leaving school with low attainment levels may have been disproportionately impacted by recent changes. Meanwhile the share of higher apprenticeships has increased across all areas. Whilst intermediate apprenticeships have fallen from 70% to 60% of apprenticeships in the Greater Exeter area, Advanced apprenticeships have increased from 36% to 41%, and Higher Apprenticeships from 1% to 5%.

Figure 3.13 Number of new apprenticeship starts by level and achievement, 2014/15 to 2017/18 (%)



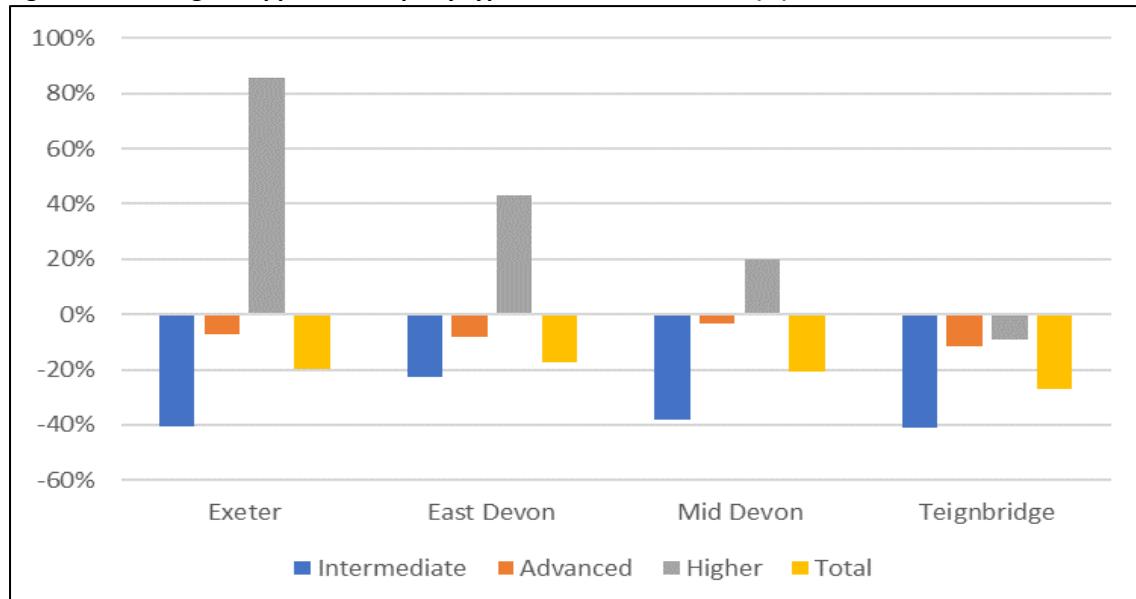
Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

East Devon has a different distribution of apprenticeship levels from neighbouring authorities within Greater Exeter, regionally and nationally, with a greater reliance on Intermediate Apprenticeships, shown by figure 3.14 overleaf.

Figure 3.14 New apprenticeship starts by level, 2017/18 (%)

Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

The apprenticeship levy has had a different impact in each area – as shown in figure 3.15, Exeter has maintained strong growth in Higher Apprenticeships, while Teignbridge has had a decrease across all types. Although Intermediate Apprenticeships were hit hardest, East Devon was less affected than other areas.

Figure 3.15 Change in apprenticeships by type, 2016/17 to 2017/18 (%)

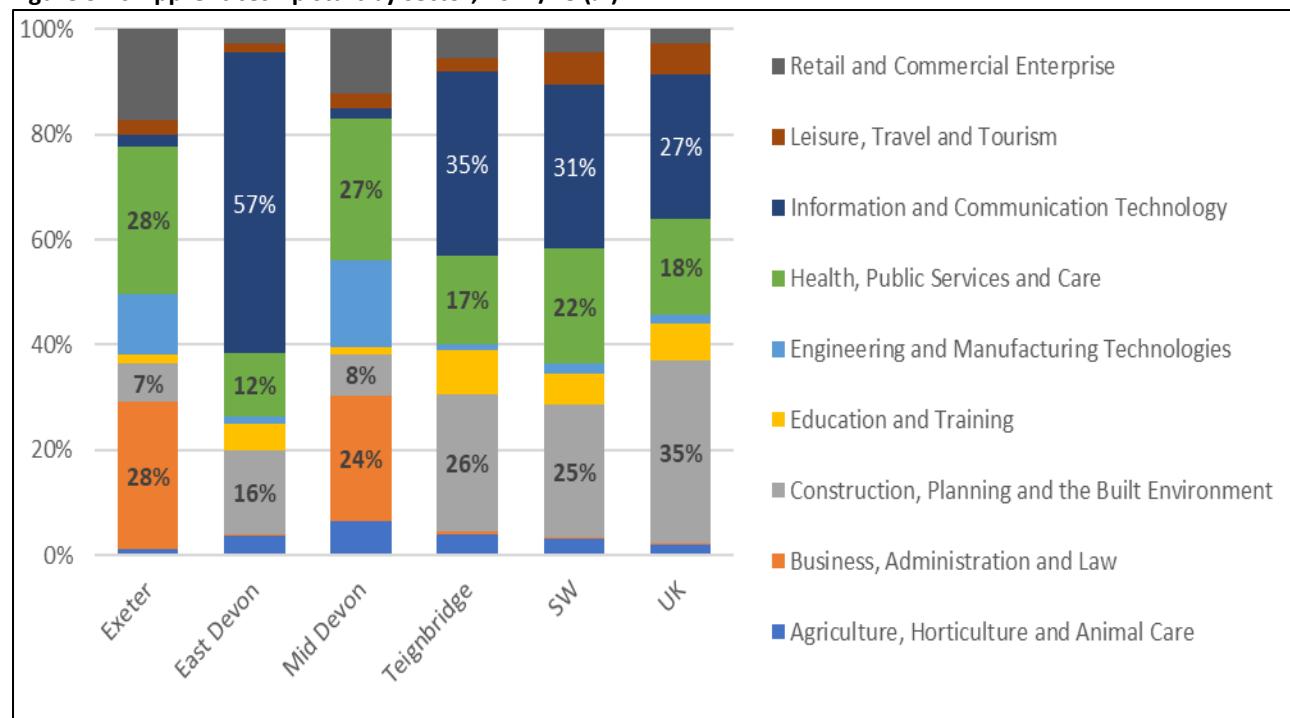
Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

Sector distribution

Figure 3.16 shows the sector distribution of apprenticeship starts for 2017/18. These are broadly stable over time, with achievements following the same pattern. However, there are substantial differences in the sector distribution across the Greater Exeter area. Most notably is the predominance of ICT apprenticeships in East Devon, health/care, retail/commercial and business/admin in Exeter and Mid Devon – there is also a high proportion of engineering/manufacturing apprenticeships in an otherwise Services dominated distribution.

Teignbridge follows the regional and national pattern, with slightly more agriculture and slightly less leisure and tourism.

Figure 3.16 Apprenticeship start by sector, 2017/18 (%)



Source: Apprenticeships geography and sector subject area PivotTable tool, gov.uk

3.6 Training Provider base

The Greater Exeter area is fortunate in having a strong skills provider base with 10 providers in Exeter (8), East Devon (1) and Teignbridge (1), which collectively supported over 17,000 learners in 2016/17, including 7,000 people taking part in Education and Training; 4,400 apprenticeships; 4,100 people taking part in Community Learning. The impact of funding cuts in recent years is perhaps reflected in a fall from over 20,000 learners in 2013/14.

3.7 Higher Education

Young people from Exeter and the surrounding area attend universities across the country. However, Exeter city hosts a top-ranking, Russell Group research intensive university, which has enormous potential to support skills acquisition in the area.

The University of Exeter is the sole Higher Education provider in the Greater Exeter area and comprises campuses in Exeter City, as well as at Penryn in Cornwall. The figures shown below include students based in Cornwall who comprise 10% to 11% of the student population.

Table 3.10 shows the number of students enrolled at UoE by academic year⁹. UoE has grown steadily for well over a decade, with a 21% increase in the last five years. This growth is likely to continue, noting that student recruitment in the sector is lower in 2018/19 (expected to continue into 2019/20) due to a fall nationally in 18-19 year olds and the impact of Brexit for the sector could be substantial. The sector also faces uncertainty with the prospect of decreasing student fees.

⁹ The University reporting year runs from 1st August to 31st July.

International (non-EU) students account for around 19% of the student population and have grown by 24% over the period to around 4,500 students. A further 2,000 students come from EU countries outside of the UK. There remains substantial concern over the impact of Brexit for this sector in attracting and retaining students and staff, and in maintaining international competitiveness. The sector also faces uncertainty with the prospect of decreasing student fees.

Table 3.10 – Student enrolment at the University of Exeter by level and year – numbers and % change

Level	2014/15	2015/16	2016/17	2017/18	2018/19	5 Yr % Change
Undergraduate	15,899	17,131	17,971	18,152	18,932	19%
Postgraduate Taught	2,291	2,353	2,600	2,895	3,078	34%
Postgraduate Research	1,395	1,461	1,515	1,493	1,603	15%
Total	19,586	20,945	22,085	22,540	23,613	21%

Source: University of Exeter

The presence of the University of Exeter has the potential to provide a supply of high-level STEM skills as well as attracting academic researchers with reputations for research excellence into the area. The University supports 9,265 in STEM and medicine, with about more than 50% of postgraduate research students working in these disciplines.

In 2017-2018 the University placed GBP 97 graduates on internships with local businesses and at the University (though the majority of these were actually located within the university itself).

3.8 Graduate retention and destination

The destinations of graduates is measured 6 months after graduation through the Destinations of Leavers from Higher Education Survey. Table 3.11 shows that in 2016/17, 11.5% of graduates remained working for an employer based in Exeter, adding 337 to the graduate workforce. A further 142 graduates remained working for an employer elsewhere in Devon.

Table 3.11 – Destinations of graduates from the University of Exeter (2016/17)

Location of Employer	Campus				Total
	Cornwall		Exeter		
Exeter	12	4.4%	325	12.2%	337 11.5%
Devon	23	8.4%	456	17.1%	479 16.3%
Cornwall	49	17.8%	44	1.6%	93 3.2%
Somerset	11	4.0%	83	3.1%	94 3.2%
Dorset	1	0.4%	73	2.7%	74 2.5%
Gloucestershire	9	3.3%	112	4.2%	121 4.1%
Bristol	4	1.5%	71	2.7%	75 2.5%
Wiltshire	2	0.7%	43	1.6%	45 1.5%
South West	97	35.3%	846	31.7%	943 32.0%
Total	275	100%	2668	100%	2943 100%

Source: University of Exeter

Table 3.12 overleaf shows the distribution of graduates who remained in the South West by occupational classification. It is likely that the distribution in the Exeter area will somewhat match the regional distribution with most popular occupation choices being teaching and education; science, research, engineering and technology; health; and business and public service sectors.

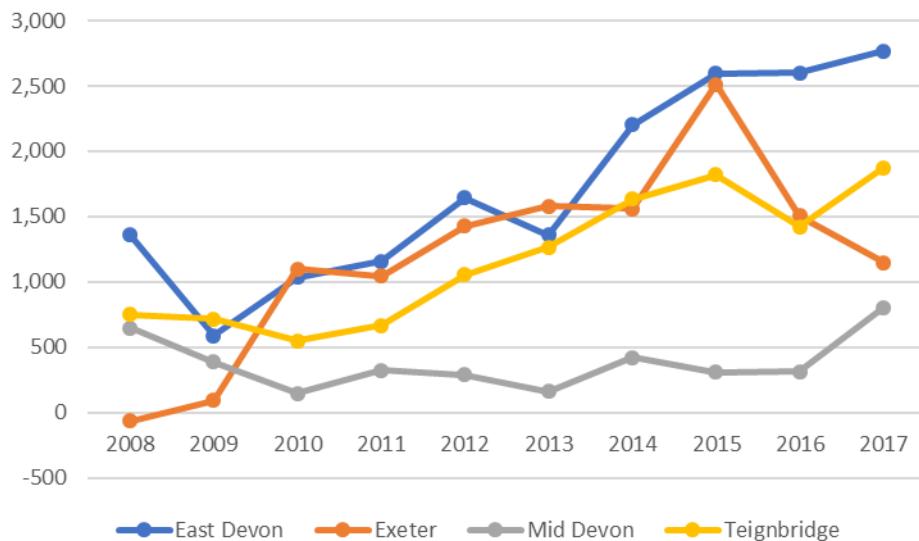
Table 3.12 – Occupations in the South West of graduates from the University of Exeter (2016/17)

SOC - Sub Major Grouping / Unit Description	Cornwall	Exeter	Grand Total
Business and Public Service Associate Professionals	15	118	133
Business, Media and Public Service Professionals	5	68	73
Corporate Managers and Directors	4	22	26
Culture, Media and Sports Occupations	7	34	41
Health and Social Care Associate Professionals	9	24	33
Health Professionals	1	132	133
Other Managers and Proprietors	3	13	16
Science, Engineering and Technology Associate Professionals	4	12	16
Science, Research, Engineering and Technology Professionals	47	112	159
Teaching and Educational Professionals	2	311	313
Grand Total	97	846	943

Source: University of Exeter

3.9 Migration

The Greater Exeter area has seen expansion over an extended period due to net inwards migration. Figure 3.17 shows the number of net migrants in each of the four areas over time. East Devon has seen net migration growing steadily, while Exeter's growth from migration has fallen in recent years.

Figure 3.17 Greater Exeter net inward internal migration (number)

The majority of migration flows and net inward migration in the Exeter area is from movement within the United Kingdom – internal migration – rather than international migration. Whilst net internal migrants vastly outnumber international migrants in East Devon (18 times as many), Mid Devon (10x) and Teignbridge (13x), net international and internal migration are at similar levels in Exeter city. The University will drive much of this activity.

In 2017, the “post-university” working age population (25 to 64 years) in the Greater Exeter area expanded by about 3,600 people. However, the Exeter labour force contracted across all age groups, resulting in a net outward flow of working age migrants between 25 and 64 years old of ~500. As such, the growth in this population of 4,000 migrants more than offset Exeter’s loss.

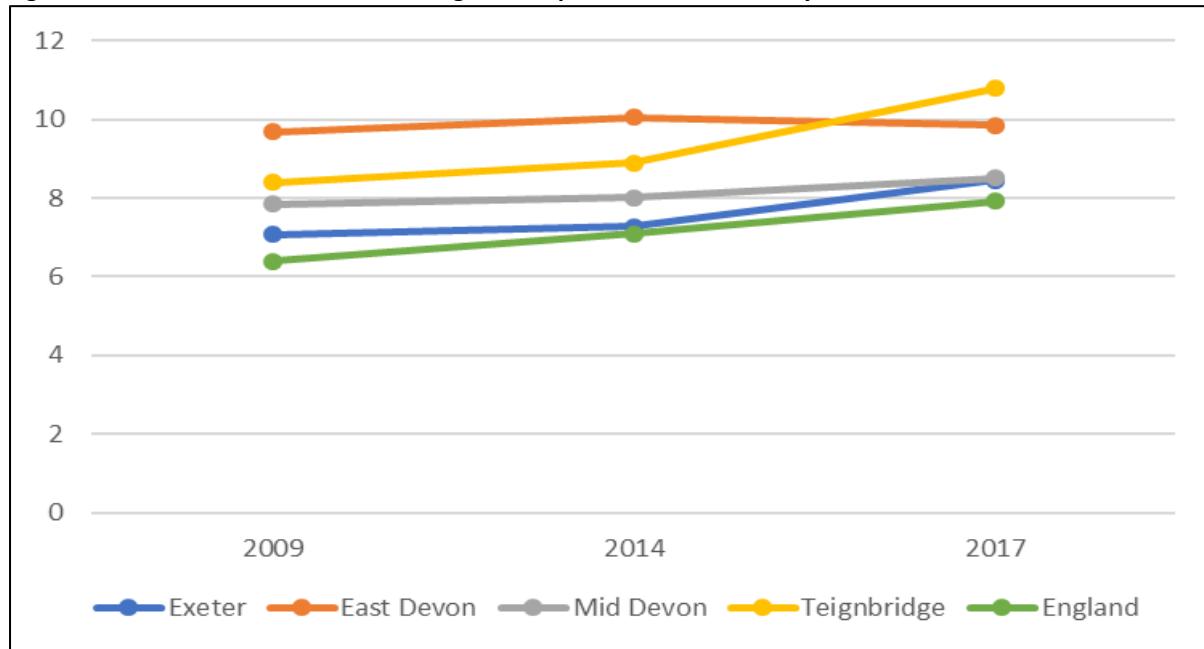
3.10 House prices

House prices relative to income and salaries remain an issue across the United Kingdom as a whole. Figure 3.18 below shows the ratio of the average price for a semi-detached home relative to the average full-time wage of workers in the Greater Exeter area and nationally (England) over the period from 2009 to 2017.

England has higher average wages than all the Greater Exeter areas, whilst also having lower average house prices and thereby a lower house price to salary ratio. This ratio has increased from just over 6 in 2009 to 8 in 2017. These figures are “better” (in terms of affordability) than any of the comparable ratios in the Greater Exeter area over the same period.

The figure shows that the ratio increased in all areas between 2009 and 2017, except in East Devon, which at a ratio of 10 was recently overtaken by Teignbridge (which was nearly 11 in 2017) where wage growth has not kept up with house price growth. The high ratios across the Greater Exeter area clearly have consequences for attracting and retaining unskilled and skilled labour as ratios are lower on average elsewhere.

Figure 3.18 Greater Exeter ratio of average house price to full-time salary



Source: Ratio of house price to workplace-based earnings, ONS

In assessing the Greater Exeter area ratios that are shown in the figure below it is, of course, important to bear in mind that Exeter has substantially higher average wages than any of the surrounding LAs. This reduces the ratio in the city but means that the actual average house prices (c.£282,000 for a semi-detached house at the end of 2018) are also markedly higher than in most of the surrounding areas (c.£247,000 in Teignbridge and c.£224,000 in Mid Devon).

The Centre for Cities reported that Exeter had the ninth largest increase in house prices in cities across the UK in 2017-18 and was also the sixth most expensive city in terms of affordability in the UK with a ratio of 11.7 between average house price and average wage. The GB average ratio was 9.8.

4. Mapping Demand and Supply

This final section of the evidence base maps the findings in the previous two sections together, in order to explore the extent that learner provision meets business development demands, as well as assessing the likelihood of meeting future demand through supply. In more detail it examines these issues under the following three headings:

- **Skills and Labour Supply Skill Shortages**

This sub-section assesses skill gaps, mismatch and underutilisation, labour force participation rates, secondary school and further education outcomes, demographics and migration.

- **Labour Demand and Economy**

This sub-section examines the evidence on forecast changes to industries and sectors, as well as concentrations of employment in occupational roles and productivity in Exeter.

- **Cross-cutting themes**

This third sub-section discusses themes that impact on the supply and demand side: travel to work, house prices, the inter-relationships within the Greater Exeter economy and EU exit.

The report concludes with a summary of the key issues for consideration that have emerged from the evidence base to help inform the development of the Exeter Skills Strategy. These have been identified on the basis of factors that could impact on the supply of labour in terms of the forecast business demand and any barriers or issues within the current skills system adjusting to meet this forecast business demand. However, in order to obtain a full picture of skills needs in the city, the identified issues and this evidence base should be read together with the accompanying report on the survey of Exeter businesses' skills needs.

4.1 Skills and Labour Supply Skill Shortages

Quantifying the extent to which Exeter's working age population have the necessary skills, experience and aptitude to meet employers' *current* needs is not straightforward. There are many factors that play into the equation of discovering whether there are sufficient numbers of the "right people for the job", yet the data that is available for analysis is limited, mainly relating to qualification levels and training on the individuals' side and to employers' own judgements on the other side.

Any assessment about whether employers' *future* skills needs can be met requires making a set of assumptions about what employers *might* need in the future, based on the sectoral types of employers who *might* be seeking employees. Consequently, it is important to note that the process of examining potential skills gaps and labour shortages involves a series of estimations of the most likely scenarios and consideration of what they might mean, based on our current knowledge.

Similarly, assessments of the other key factors that will impact on the process – such as economic activity rates, demographics, migration and skills mismatch – are all also subject to the usual provisos concerning projections and forecasts. Crucially, the forecasts are based on policy neutral scenarios.

Skills gaps

The main findings from the 2017 Employers Skills Survey (ESS) data for Devon indicate that while the proportions of businesses who had recruited in the last year (47%) or had a vacancy at the time of the survey (19%) were almost the same as in England (51% and 20% respectively), in some respects the county has a slightly higher prevalence of recruitment and skills issues than that found across the country. For both hard-to-fill vacancies and skills-shortage-vacancies¹⁰, Devon had a higher prevalence rate than England as whole. For vacancies and skills gaps it had the same level.

¹⁰ Skills-shortage-vacancies (SSVs) are vacancies that were hard to fill because of a lack of applicants with the required skills.

However, the previous ESS in 2013 reported that Devon had the same or lower levels of prevalence than England. Indeed, not only had the total number of vacancies in Devon nearly doubled from 6,771 in 2013 to 12,009 in 2017, but the number that were hard-to-fill had more than tripled from 1,628 to 5,901. Furthermore, the survey shows that:

- In 2013 there were nearly 1,200 vacancies in Devon that employers could not fill because they could not find applicants with the required skills and that by 2017 this number had increased to 3,539;
- Similarly, in 2013 there were over 13,500 employees in the county who did not have the skills required to perform their current job – by 2017 this had increased to 16,770.

When they were asked *why* they had hard to fill vacancies, the answers given in Devon were markedly different from those given across England. Devon employers were more likely to report the wider reasons for having hard-to-fill vacancies as being:

- Not enough people interested in doing this type of job;
- Low number of applicants with the required attitude, motivation or personality;
- Remote location/poor public transport; or
- Job entails shift work/unsociable hours.

Conversely, Devon employers were less likely to report that the reasons were:

- Low number of applicants with the right skills; or
- Lack of work experience that the company demands.

Please see the findings from the business survey of Exeter employers for the local perspective on this.

Mismatch and underutilisation

This section discusses the qualifications and skills of Exeter residents relative to their occupations. The data shows that currently Exeter residents have a markedly greater proportion of higher-level occupations – managerial, professional and associate professional/technical jobs (53.7%) – than residents of Greater Exeter (47.2%), the South West (44.7%) and the UK (45.6%). Exeter residents also differ from the regional and national occupational profiles in two further key ways:

- The slightly greater proportion with elementary level occupations (14.6% of occupations compared with 10.6% of the South West and 10.5% of the UK); and
- The markedly lower proportion with skilled trades and caring, leisure and service occupations (9.0% compared with the South West (20.8%) and the UK (19.3%)).

Correspondingly, the data on educational attainment indicates that the working age population of Exeter is very highly qualified, with over half of 16 – 64 years old residents (51.4%) being qualified to NVQ 4 level or above. This figure compares with around two fifths of the working age population nationally (38.4%) and regionally (39.0%). As such there is little indication on the surface of any overarching mismatch or underutilisation between higher level qualifications and higher-level occupations among city residents. Indeed, as noted above, Devon employers were less likely than other employers nationally to report the reasons for having a hard to fill vacancy as being because of a low number of applicants having the right skills.

Labour force participation rates and unemployment

Both Exeter and the Greater Exeter area have had a growth in the numbers of economically active residents over the last decade, although the Greater Exeter area (+4.2%) has been at a slower rate than that seen in Exeter (+10.7%), regionally (+7.4%) or nationally +7.4%). However, the proportion of the resident working age population who are economically active has remained consistent at around 80% - it is the increase in the overall population size that has led to the increase in the numbers of people who are economically active. The Centre for Cities reports that in the year up June 2018, Exeter has the seventh highest employment rate among cities in the UK.

Similarly, over the decade there has been an increase in the numbers of residents in employment in Exeter, where the growth in absolute numbers (7,500) and proportionate increase (+12.6%) are both markedly larger than any of the neighbouring local authorities. Proportionately, the Exeter increase is also slightly larger than the regional and national increases over the same time.

The overall growth in the number of Exeter residents who are economically active and in employment are closely linked to the growth in population in the city, as the underlying participation rates have remained consistent. Nonetheless, while the overarching figures have remained steady, there are three underlying trends that stand out as being significant in terms of the Skills Strategy:

- The continuing reduction in the numbers of people who are unemployed;
- The slight decrease in the number of people who are employees; and
- The very marked increase in the number of people who are self-employed.

The growth in employment in Exeter has impacted positively on the level of unemployment both in the city and in the surrounding greater Exeter local authority areas. There have been successive reductions in the number of residents claiming benefits and the proportionate figures for the city (8.8%) are below both the regional (9.7%) and national averages (11.0%), as are those in East Devon (8.2%) and Mid Devon (8.9%).

The slight decrease in the number of Exeter residents who are employees – by 1,900 (-3.4%) between 2009 and 2018 is of interest to the Skills Strategy when considered in relation to the increase of c. 6,000 (+136%) in the number of residents who are self-employed. Given that historically most on-the-job training and up-skilling is delivered through employers for their employees, there is a potentially very significant issue here in terms of how any skills gaps among these self-employed people might best be addressed in the future.

Secondary School and Further Education outcomes

At key stage 4, the performance of students across the Greater Exeter area at GCSE level, including Ebacc metrics was broadly on a par with national figures – with 41% of pupils achieving Grade 5 or above in English and maths GCSEs, only slightly below the regional and national averages of 43%. However, in Exeter itself, the figure was markedly lower at 36%, as it was in Central Devon.

The situation in Exeter with the performance of state-funded secondary schools is greatly complicated by the interrelationship with schools in the surrounding areas and the large number of private schools within Exeter itself. This results in many young people either travelling into Exeter to attend the private schools, or out of Exeter to attend grammar schools such as Colyton, Torbay Girls, etc. Invariably these young people are those with the higher aspirations and/or abilities.

In term of achieving an HE destination, the Exeter figures were also markedly different from those for England: Just over a third (36%) of students in Exeter went onto Higher Education compared with half (50%) across England. These key stage 4 and 5 figures are both sources of concern for the city, as they indicate that a lower proportion than average of resident young people are likely to achieve the qualifications required for the jobs that are likely to be on offer in the city.

Apprenticeships

Nationally, the number of new apprenticeships fell sharply in 2017/18 following the introduction of an apprenticeship levy. In Greater Exeter there was a 20% fall in one year resulting in 1,020 fewer apprenticeships. (This fall in starts is not yet reflected in the number of achievements). Apprenticeships across the Greater Exeter area were more likely to be completed compared to regionally and nationally – achievements in 2017/18 were 66% of the number of starts, compared to 56% in the South West and 54%-55% in the United Kingdom.

Higher Education and Graduate Retention

The University of Exeter is the sole Higher Education provider in the Greater Exeter area. It currently has over 23,500 students, most of whom are based in or close to the city (c.10% are in Cornwall at the campus in Penryn). This total represents a 21% increase in the last five years – growth which is likely to continue although the impact of Brexit is unclear. International students account for around a fifth of the student population.

The presence of the university has the potential to provide a supply of high-level STEM skills as well as attracting academic researchers with reputations for research excellence into the area. The University supports 9,265 students in STEM and medicine, with more than 50% of postgraduate research students working in these disciplines.

The latest data shows that 11.5% of graduates remained working for an employer based in Exeter, adding 337 to the graduate workforce. A further 142 graduates remained working for an employer elsewhere in Devon.

Demographics and migration

The Centre for Cities reported that Exeter was the sixth fast growing city in the UK in 2016-17. However, the forecast demographic figures put this growth into perspective, showing that in Exeter the ratio of the working age population (16-64 years) to the retired population (65+ years) has shifted in the last 10 years and is projected to move further – although many people now work beyond 65, the working age population of the city is forecast to decrease comparative to the number of retirees.

In terms of the available labour force, the Greater Exeter population grew from 276,000 in 2007 to 288,000 by 2017 (0.4% per annum), with projected growth to 299,000 expected over the next decade up to 2027 (0.3% per annum). For Exeter itself, the population projections indicate that although the size of the working age population of Exeter will increase by c.5,600 people from 88,800 in 2017 to c.94,400 in 2027 (+6.3%), in proportionate terms this will actually represent a decrease from 68.9% in 2017 to 67.5% in 2027 (-1.4%).

The Greater Exeter area has seen expansion over an extended period due to net inwards migration. Exeter's growth from migration was most marked in the period between 2009 and 2015, though it has fallen in recent years. The majority of this migration flows and net inward migration is from movement within the United Kingdom – internal migration - rather than international migration.

Between 2016 and 2017, the “post-university” working age population (25 to 64 years) in the Greater Exeter area expanded by about 3,600 people. However, the Exeter labour force contracted across all age groups, resulting in a net outward flow of working age migrants between 25 and 64 years old of ~500. As such, the growth in this population of 4,000 migrants more than offset Exeter's loss.

4.2 Labour Demand and Economy

This sub-section examines forecast changes to industries and sectors, in terms of concentrations of employment in occupational roles and productivity in the city.

Employment

Looking first at the current situations of residents in employment, and as reported above, Exeter has a markedly higher proportion of high-level occupations (53.7%) than Greater Exeter (47.2%), the South West (44.7%) and the UK (45.6%). The city also differs in the slightly greater proportion of elementary level occupations (14.6% compared with 10.6% South West and 10.5% UK); and lower proportion of residents in skilled trades and caring, leisure and service occupations (9.0% compared with 20.8% South West and 19.3% UK).

Turning to industrial sector, the data shows that in Exeter currently the highest concentrations of employment are found in four specific sectors, which in combination account for two thirds of all of the c.91,000 employees in the city:

- Public administration, education, health and social work (35.2% of all employees).
- Wholesale, retail & motor trade (14.3%);
- Business admin & support (9.9%); and
- Professional, scientific and technical activities (8.8%).

Looking forward, the forecast data indicates that by 2029 there will be 8,972 more FTE employees in Exeter, equivalent to an 11% overall increase. Most of these extra jobs are forecast to be in just three sectors, which together account for 60% of the total forecast increase:

- Professional, scientific and technical (+2,440 FTEs);
- Human health and social work (+1,483); and
- Business admin and support services (+1,496).

The forecasts also predict increases in FTEs in each of the three surrounding areas, with the growth also being predominantly in professional, scientific and technical, human health and social work and business admin and support services FTEs:

- Mid Devon = +2,555 FTEs (8%);
- East Devon = +4,569 (9%); and
- Teignbridge = +4,643 (10%).

In total the forecasts indicate that across the Greater Exeter area as a whole there will be an increase of over 20,000 FTEs by 2029. The national growth rate for the same period is 11%, which matches the predicted rate in Exeter, though is slightly higher than in the three surrounding three areas.

Productivity

In terms of productivity, the forecast is for steady growth in productivity in Exeter – reaching over £50,000 GVA/FTE in 2029 and continuing to over £60,000 in 2038. Due to the sector and occupational differences in their profiles, there is a marked difference in productivity between Exeter and the surrounding areas – both in terms of its absolute value and the forecast change. The GVA per FTE head of these areas is predicted to continue to grow, albeit at a more modest level than in Exeter.

On the surface the historic increases and the forecasts present a positive picture for the future growth of productivity in Exeter and the surrounding area. However, when benchmarked against the national average they portray a somewhat different picture. Since 2000, Exeter has remained at around 90% – 95% of the national figure. Furthermore, the forecasts are for this pattern to continue to 2038 with the Exeter figure staying between 93% and 95% of the national figure. Teignbridge (c.80% - 85%), East Devon (c.70% - 75%) and Mid Devon (c.65% - 70%) are even further below the national average.

4.3 Cross-cutting themes

This sub-section discusses travel to work, house prices, the economic inter-dependency of the Greater Exeter area and EU exit.

Travel to work

Exeter is an “employment magnet” drawing in many commuters from the surrounding areas. Census data from 2011 indicate that there is a net inflow of c.26,000 commuters, made up of c.37,000 commuters (or c.45% of the workforce) coming into the city and c.11,000 going out. The majority of the 37,000 live in the three surrounding greater Exeter local authority areas.

House prices

Of course, the average house price in Exeter being c.£282,000 for a semi-detached house at the end of 2018 is very likely to be a key factor in the markedly lower proportion of the city's working age residents in skilled trades and caring, leisure and service occupations. Prices have been driven up by the numbers of residents in higher skilled and higher paid jobs, resulting in the city being the sixth most expensive in terms of house affordability in the UK with a ratio of 11.7 between average house price and average wage.

With house prices nationally forecast to continue rising, albeit more slowly, and more high qualified jobs forecast for Exeter it is unlikely that the ratio will decrease in the foreseeable future.

Economic, Employment and Educational Inter-dependency of the Greater Exeter area

What is very clear from the points above concerning the low proportion of Exeter's residents working in skilled trades and caring, leisure and service occupations, the travel to work issues, house prices and travel to and from secondary schools is the very close economic, employment and educational interdependency of Exeter and the three nearest Local Authorities in the Greater Exeter area.

In terms of meeting future employment growth and the related skills needs and gaps, consideration should be given to the ways in which the area functions as an economic "entity" and how this might best be capitalised on for the benefit of all.

Brexit

With the outcome of the Brexit negotiations still unknown, it is not possible to clearly assess what the impacts on skills needs and demands in Exeter will be. While it is apparent that in many ways there could be very marked impacts, whatever the outcome of the negotiations, discerning what these impacts might be is not evident. As well as the issues associated with the movement of labour across the EU, historically it is known that times of economic uncertainty can lead to employers reducing the amount of resources they are prepared to devote to training.

Therefore, some of the issues on which it might impact that are of the most immediate relevance to the skills needs and gaps assessment are:

- Employment levels in those specific sectors known to have high levels of EU workers, such as health and care or construction;
- The need for employers to invest in new, different skills to access new markets or to develop different products/services for different markets (particularly import/export knowledge);
- A possible reduction in training being provided because of employers concerns about economic uncertainty and/or that staff may leave as a result of Brexit; and
- The profile of international students at the University of Exeter of whom, xx% are currently from EU countries.

As the Skills Strategy is developed, the emerging resolution of Brexit will need to be considered closely in relation to these issues and others.

4.4 Issues for consideration in the Skills Strategy

This evidence base has been compiled to help inform the development of the Exeter Skills Strategy and, in order to obtain a full picture, should be read together with the accompanying report on the survey of Exeter businesses' skills needs. The main purpose of the two documents is to highlight skills needs and issues that the Strategy could be used to address.

The overarching issues identified by the evidence base for consideration are summarised below and it is worth highlighting that the business survey provides more details on some of these matters:

- **Marked growth in the numbers of self-employed residents**

Further research is needed to explore and understand the skills needs of the self-employed in the city, now accounting for c.15% of employment. The available data does not provide sufficient detail on the employment characteristics, qualifications or aspirations of this group of workers to fully assess their requirements. A good starting point for this would be to request full breakdowns of BRES and APS survey data from NOMIS.

- **Lack of residents working in skilled trades and caring, leisure and service occupations**

The “gap” in the occupational profile of the city’s residents indicates the inter-dependence of the city and its economy with its neighbouring areas, as these roles are primarily filled by residents of the surrounding areas. Consideration should be given to the longer-term impact of this on social cohesion, travel patterns and training, particularly as the employment and population projections indicate that the trend will continue to increase.

- **Forecast shortfall in the size of the working age population**

The total employment growth for the city is forecast to be of the order of 9,000 FTEs by 2029, primarily in the higher skilled and qualified occupations. This number of FTEs equates to c.12,000 people, allowing for part-time working. However, the population projections only indicate an increase of c.6,000 people of working age in the city by this date. On this basis there will be an overall shortfall of c.6,000 working age people.

- **Continued growth in more highly qualified jobs**

Much of the forecast employment growth in the city will be in the more highly qualified occupations of professional, scientific and technical, human health and social work and business admin and support service roles. Further research is required to understand how the specific skills needs of these sectors might be best met, such as developing specialisations in particular areas for the city to lead on (previously proposed by SLIM as a ‘data analytics skills escalator’ for the HotSW area). Related to this, further improvement in graduate retention – through placements, internships, joint projects, enterprise programmes and activities that raise employers’ awareness of the value of graduates’ skills – would help address the issue.

- **Matching local young people’s skills with job growth forecasts**

As noted, most employment growth is forecast to be in more highly qualified jobs, yet too few of Exeter’s young people are likely to be going into HE to obtain the relevant necessary qualifications. Work is needed to improve the outcomes in the city’s secondary schools and raise the aspirations of young people. A range of activities such as campus visits, master-classes, summer schools and work experience and building ‘escalators’ that allow progression from school, to college and university in areas of skills shortage and strategic priority could be further developed across the city’s secondary schools.

- **Vacancy and recruitment issues**

The total number of vacancies in Devon nearly doubled between 2013 and 2017, while the number that were hard-to-fill had more than tripled in the same period. Furthermore, the number of who did not have the skills required to perform their current job increased by over 4,000. If the business survey of Exeter employers reports similar findings, then these areas will require further investigation.

- **Apprenticeships**

In terms of improving the broad supply of young people with skills, the drop off in the number of Apprenticeships that the research found needs to be addressed. The opportunities offered to both the apprentices and their employers through the schemes are very significant and should be further developed, promoted and encouraged.

Appendix I – Main data sources and references

Labour Market data

<https://www.nomisweb.co.uk/>

Business Register and Employment survey

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/businessregisterandemploymentsurveypresovisionalresults/provisionalresults2017revisedresults2016>

Productivity and employment forecasts

HotSW Amore Economic model

Population data

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforkenglandandwalescotlandandnorthernireland>

Population projections

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections>

Recruitment and vacancies data

<https://data.gov.uk/dataset/744da5f0-ee71-4e74-b787-81819b267250/uk-employer-skills-survey>

Apprenticeship data

<https://www.gov.uk/government/statistical-data-sets/fe-data-library-apprenticeships>

Schools data

<https://www.compare-school-performance.service.gov.uk/schools-by-type?step=default&table=schools®ion=all-england&for=secondary>

House prices

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/housepricestatisticsforsmallareas/yearendingjune2018>

Skills Advisory Panels (SAPs): Analytical Toolkit

<https://www.gov.uk/government/publications/skills-advisory-panels-analytical-toolkit>

Exeter & Heart of Devon Skills Plan Evidence Base

SLIM/Marchmont Observatory 2015

Employers Skills Survey 2018

IFF/DfE

Devon Workforce Skills Survey 2017

Wavehill

Local Government Association Brexit report: Moving the Conversation On

https://www.local.gov.uk/sites/default/files/documents/5.39%20Brexit_v06WEB.pdf

Cities Outlook 2019

Centre for Cities