

Summary of the Strategic and Economic Context of Berkshire

Annex A is a summary of the strategic and economic context of Berkshire.

This provides the underpinning rationale drawing on evidence from the Thames Valley Berkshire LEP, Local Authorities, and Strategic Partners together with any necessary supporting analysis and data.

Data has been provided by the Thames Valley Berkshire LEP, informed by the joint Data Working Group that was set up to service the LSIP.

We have also benefited from a wide range of useful reports and intelligence from other partners such as the Thames Valley Berkshire LEP, REDA, and Trade Bodies. A list of sources is included at the end of Annex A.

There are four main sections. There is a summary at the start of each of the first three sections which sets out the main headlines, and the implications of these findings for the LSIP and the changes that are required.

In Section D, a 'deep dive' of the identified priority sectors is set out. This includes the triangulation of employer feedback on hard-to-recruit roles which have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Executive Summary

One strong theme became very apparent in much of our engagement:

- A perceived disconnect between business and education: the two do not talk together in the best way.

In summary, the analysis in Annex A confirmed that the three critical needs that technical education and training can deal with are:

- Improving the direct supply of people from Further Education and Apprenticeships into employment in the priority sectors.
- Improving the productivity of people in employment.
- Decreasing the number of people who are economically inactive where there are barriers to employment that can be alleviated by training.

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Section A Demographics and Employment in Berkshire

1.0 Summary

This section reviews the demographics and employment position for Berkshire as a whole and explores some differences between the 6 Unitary Authorities of which it comprises:



Over the past two decades there has been an annual increase of 0.8% in the population (on average) which is broadly in line with the South East (0.7%).

The population of Berkshire is ageing, with the proportion aged 50+ increasing in recent years up to 2022.

Whilst there are some increases in the coming years in some local authority areas in the future workforce pipeline of 16–17-year-olds, which may increase the local labour market, they are likely to mitigate the ageing population only partly.

The forecast employment growth in Berkshire is higher than the national average, estimated as growth of 6% by 2035, compared to c.5% nationally. This growth rate is ranked 15th of the 38 LSIPs.

In addition to the net increase of 47,000 in the total size of the employed pool across Berkshire, significant replacement demand is forecast at 287,000 between 2020-2035 thereby giving a total demand for 334,000 workers to fill new and replacement posts.

The ageing population and workforce has significant implications for the labour market. As older workers retire, there may be a shortage of workers with the necessary skills and expertise to replace them. This could lead to a further tightening of the labour market with skills shortages and increased competition for workers in certain industries.

Berkshire has a much higher proportion (24.7%) of overseas residents born outside the UK compared to England as a whole (17.3%). Further, the proportions are much higher in the Reading and Slough Unitaries, of 33.5% and 44.0% respectively. The pandemic and the change in the migration laws for EU citizens from 1 January 2021 severely impacted the number of overseas adults in the workforce and the talent pipeline and in turn has further impacted the tightening labour market and skills shortages. The majority of applicants for UK registration in the County are now from Asian adults (57%) and Rest of the World (non-European) adults (18%). This trend is reflected in the LSIP recommendation for more language and cultural awareness training for workers.

Unemployment rates across Berkshire are below both the South East and national averages.

However, the combined economically inactive pool in Berkshire has increased by 2,000 (2.0%) over the 3-year period to December 2022. Further, the number of working-age retirees has increased by 1,600 (12%)

over the three-year period to September 2022 – since when it has dropped back, likely due to financial need due to the rising cost of living.

The identified issues or changes required include:

A tight and tightening labour market, affected by an aging workforce, increases in economic inactivity, and shifts in working patterns caused by the pandemic and Brexit.

A subsequent need for training to be accessible to working learners.

As the population ages, there is likely to be increased demand for healthcare and social care services.

The ageing population also has implications for the labour market. As older workers retire, there may be a shortage of workers with the necessary skills and expertise to replace them. This could lead to a tightening labour market with skills shortages and increased competition for workers in certain industries.

A requirement to provide training, including language and basic skills for recently arrived workers, particularly in Slough and Reading.

2.0 Population Trend

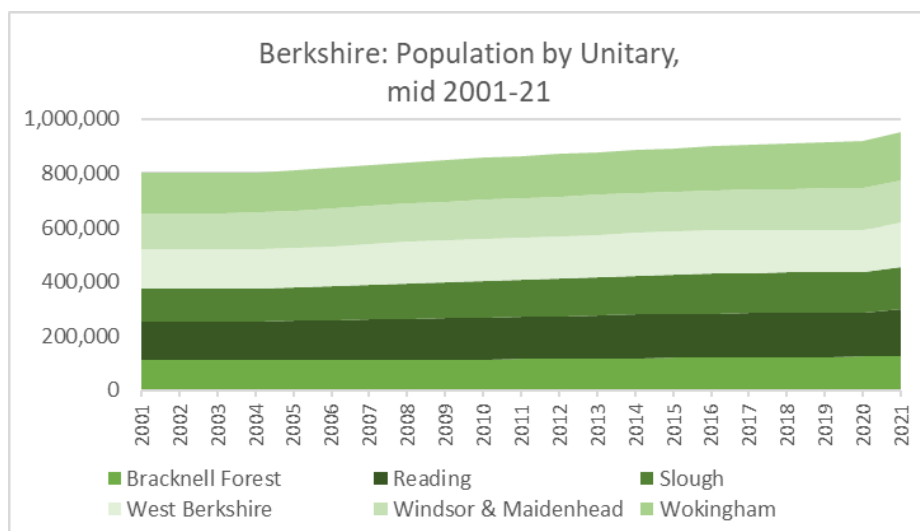
The total population¹ of Berkshire in mid-2021 was 951,000 and this had risen by 10.0% over the previous decade.

The population increased by 3.6% in the year to mid-2021 alone, following an average annual increase of 0.7% over the last two decades. This year-on-year increase compared to a 0.8% year-on-year growth in the South East and a 0.1% national decrease.

The significant increase of 3.6% in the year to mid-2021 was likely due to the pandemic-related move to remote working and studying where learners were required to live at home and workers chose where they wanted to live to carry out remote working. Whilst the impact in subsequent years, post the pandemic, remains to be seen, remote working will be a feature for many job roles, and this has substantially changed workforce resourcing and planning.

The population trend by Unitary Authority is shown below. Reading Borough was a notable beneficiary of inward migration from across the UK in the first year of the pandemic (year to March 2021), with 12.9% of inhabitants moving to the town. This compared to a 9.6% UK migration average across England.

The ONS population estimates for mid-2021 show that Reading had experienced a net 8.0% (12,900) annual increase in its population. This compared to a population increase of just 0.8% across the South-East.



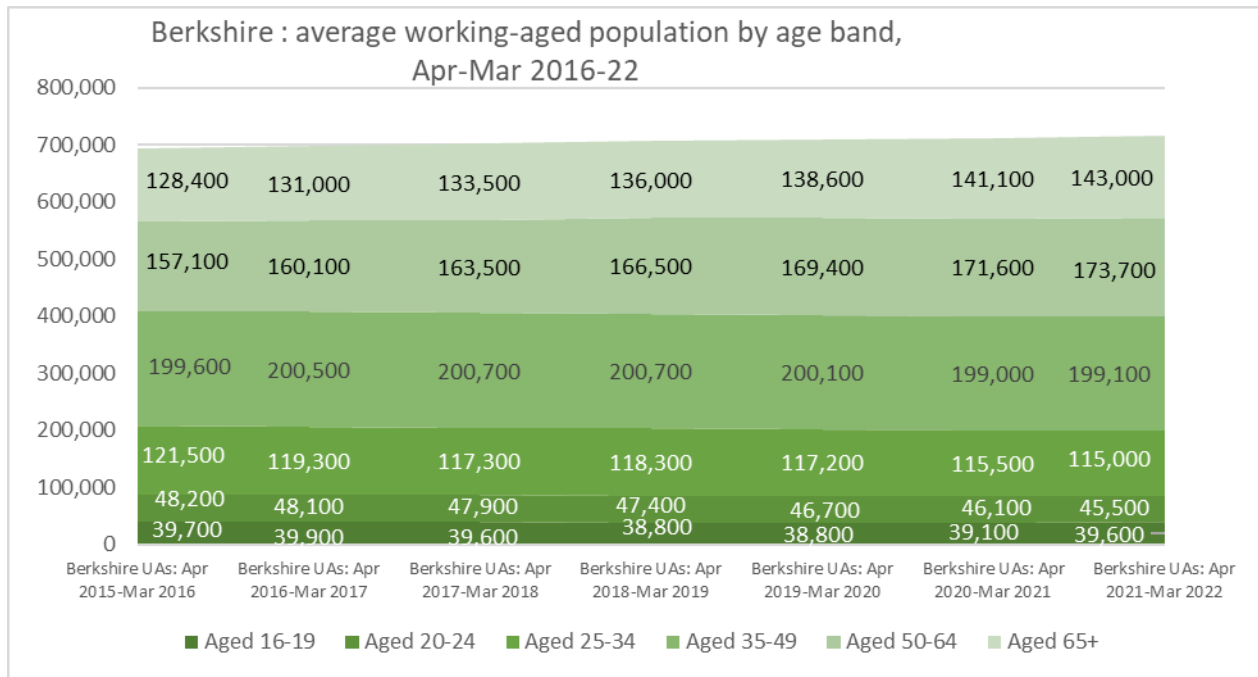
Unitary	YoY change: mid 2020-21
Bracknell Forest	+0.8% (1.0k)
Reading	+8.0% (12.9k)
Slough	+5.8% (8.7k)
West Berkshire	+2.1% (3.4k)
Windsor & Maidenhead	+1.7% ((2.6k)
Wokingham	+2.5% (4.3k)

Source: ONS *Population Estimates, mid-year 2021*

¹ <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates>

2.1 Age Profile Trend

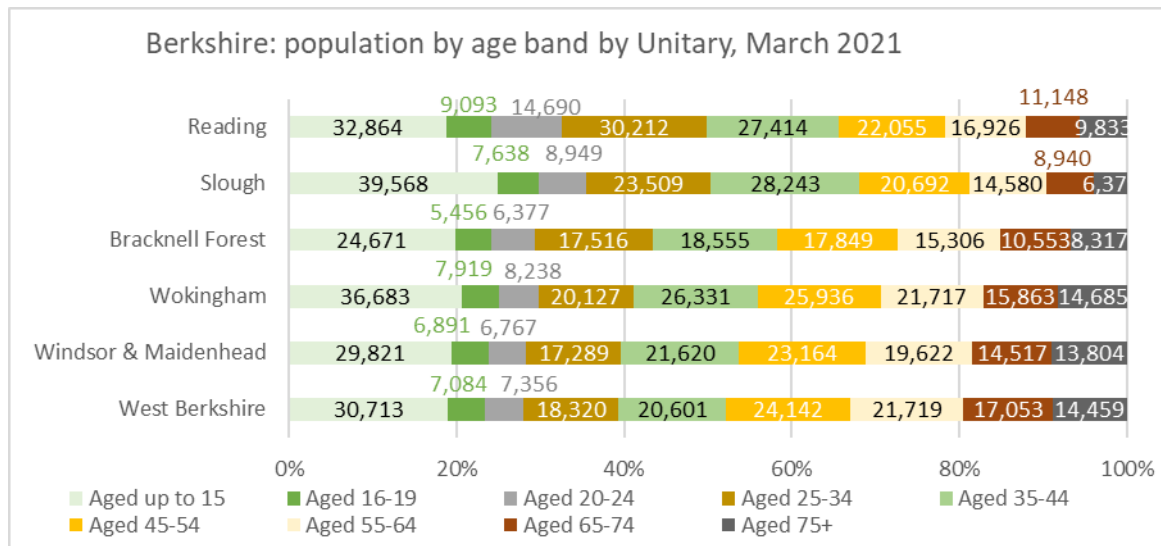
The population of Berkshire is ageing, with the proportion aged 50+ increasing in recent years through to 2022. It can be seen in the table below that the 16 to 49 working-age population reduced by 9,800 (2.4%) from 409,000 (58.9%) in 2015-16 to 399,200 (55.8%) in 2021-22. Conversely, the 50+ working-age population increased by 31,200 (10.9%) from 285,500 (41.1%) in 2015-16 to 316,700 (44.2%) in 2021-22.



Source: ONS **Annual Population Survey**

As the population ages, there is likely to be increased demand for healthcare and social care services. This will put pressure on the healthcare system and may require additional investment in healthcare, infrastructure, and workforce development. The ageing population also has implications for the labour market. As older workers retire, there may be a shortage of workers with the necessary skills and expertise to replace them. This could lead to a tightening labour market with skills shortages and increased competition for workers in certain industries.

There are some differences between the age profiles at a Unitary level. Reading Borough has a larger proportion of individuals aged 16-24 (13.6%) and the much smaller relative proportion aged 55+ (21.8%), largely due to it being the location for Reading University. Slough has the largest proportional population aged up to 15 (25.0%) and the smallest proportion of people aged 55+ (18.9%), as shown below.



Source: ONS **2021 Census**

2.2 Birth Place²

Reading and Slough have the highest proportions of people born outside the UK/EU. Reading has the highest proportion of its non-UK born population (30%) that became residents between 2017-21 as shown below.

	% Census 2021: % population born in the UK	Census 2021: % of population born in the EU	Census 2021: % of population born outside the UK/EU	Census 2021: % of non-UK born population that arrived between March 2017-21
England	82.7%	6.3%	11.0%	21.1%
Berkshire (Whole)	75.3%	8.0%	16.8%	21.1%
Bracknell Forest	82.6%	7.4%	10.0%	18.4%
Reading	66.5%	13.1%	20.4%	30.0%
Slough	56.0%	12.9%	30.9%	17.4%
West Berkshire	88.0%	4.9%	7.1%	19.3%
Windsor & Maidenhead	78.3%	7.7%	13.9%	19.1%
Wokingham	81.1%	5.2%	13.7%	18.1%

Source: ONS, **2021 Census**

2.3 Overseas Workers

The pandemic and the change in the migration laws for EU citizens from 1 January 2021, severely impacted the number of overseas adults in the workforce and the talent pipeline. Accordingly, this has further impacted the tightening labour market and skills shortages.

Following a significant reduction in the number of overseas applications in the midst of the pandemic, the numbers – as evidenced by National Insurance Number (NINo) applications³ - spiked across all Berkshire

² <https://census.gov.uk/census-2021-results>

³ <https://www.gov.uk/government/statistics/national-insurance-numbers-allocated-to-adult-overseas-nationals-to-december-2022>

Unitary Authorities. It can be seen below that the majority of applicants are now from **Asian adults** (57%) and **Rest of the World (non-European)** adults (18%).

	Total # NINo registrations to overseas adults entering the UK: 2022	NINo registrations to EU adults entering the UK: 2022	NINo registrations to Other Europe adults entering the UK: 2022	NINo registrations to Asian adults entering the UK: 2022	NINo registrations to Rest of the World adults entering the UK: 2022
TVB catchment	19,264	1,789 (9%)	2,335 (12%)	11,046 (57%)	3,440 (18%)
Bracknell Forest	1,371	152	226	588	357
Reading	6,644	630	585	3,855	1,304
Slough	5,451	461	287	3,947	737
West Berkshire	1,193	123	340	472	236
Windsor & Maidenhead	1,922	239	382	831	425
Wokingham	2,683	184	515	1,353	381

Source: DWP, *National Insurance numbers allocated to adult overseas nationals 2022*

2.4 Earnings by Place of Work and Residence⁴

For those for whom Berkshire is a **place of work**, **earnings** are higher than both the regional and national averages as shown below. For those for whom it is a **place of residence**, regardless of where they work, **earnings are typically lower** than those who work in the county (regardless of where they live) except for Windsor & Maidenhead and Wokingham. In Slough, earnings are below the South East average.

	Earnings by place of work FT gross weekly pay (£): 2022	Earnings by place of work Hourly pay, excl. overtime (£): 2022	Earnings by place of residence FT gross weekly pay (£): 2022	Earnings by place of residence: Hourly pay, excl. overtime (£): 2022
GB	642.00	16.37	642.20	16.37
South East	664.30	16.99	685.30	17.58
Bracknell Forest	847.30	22.42	729.00	18.73
Reading	727.10	19.53	698.70	18.37
Slough	741.50	18.99	657.50	16.93
West Berkshire	743.10	19.56	686.50	17.81
Windsor & Maidenhead	734.60	19.48	759.10	20.16
Wokingham	682.40	18.66	801.50	21.11

Source: ONS *Annual Survey of Hours and Earnings*

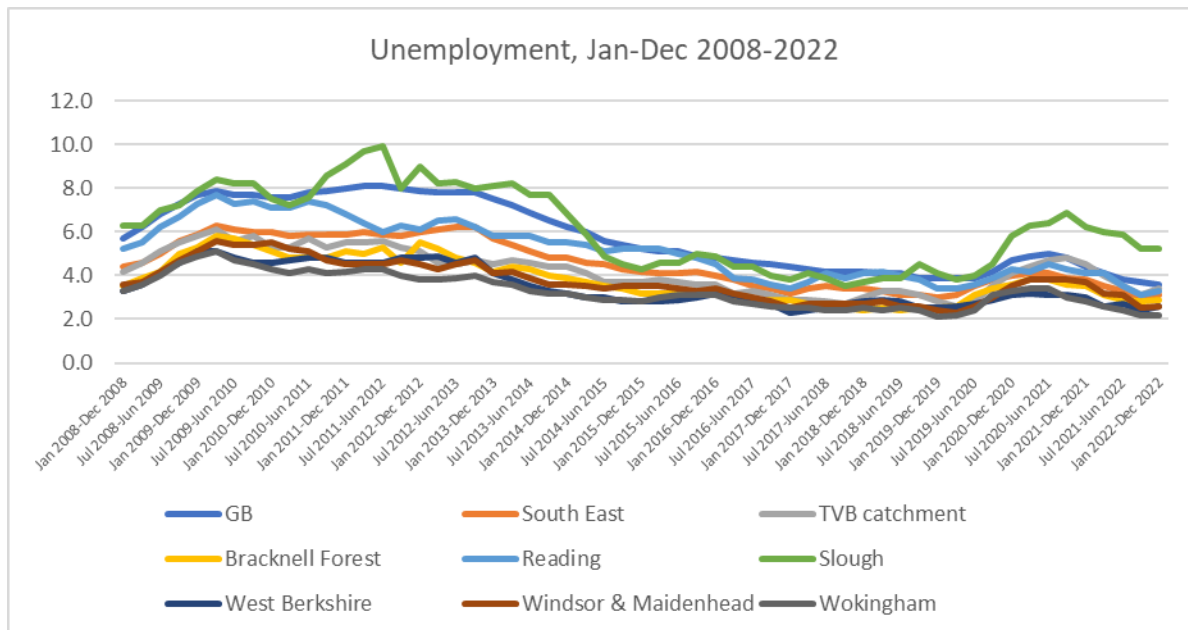
2.5 Unemployment Trend⁵

For those without work, and **officially unemployed**, rates across the Berkshire UAs have been largely below both the South East and national averages as shown below. The exception, however, is Slough

⁴ <https://www.ons.gov.uk/releases/employeeearningsintheuk2022>

⁵ <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/methodologies/annualpopulationssurveyapsqmi>

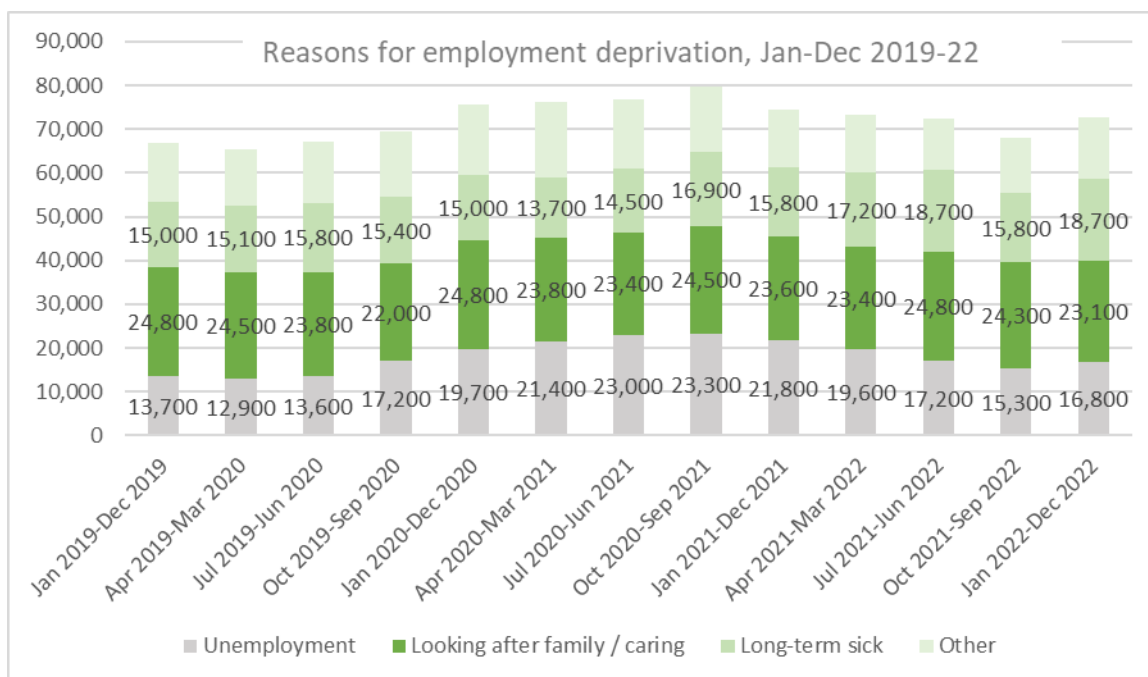
where the unemployment rate spiked up above both at the peak of the pandemic and remained significantly above (5.2%) the South East level (3.1%) and national (3.6%) level across the year to December 2022.



Source: ONS *Annual Population Survey (Model-based unemployment rate for LAs)*

2.6 Employment Deprivation and Economic Inactivity

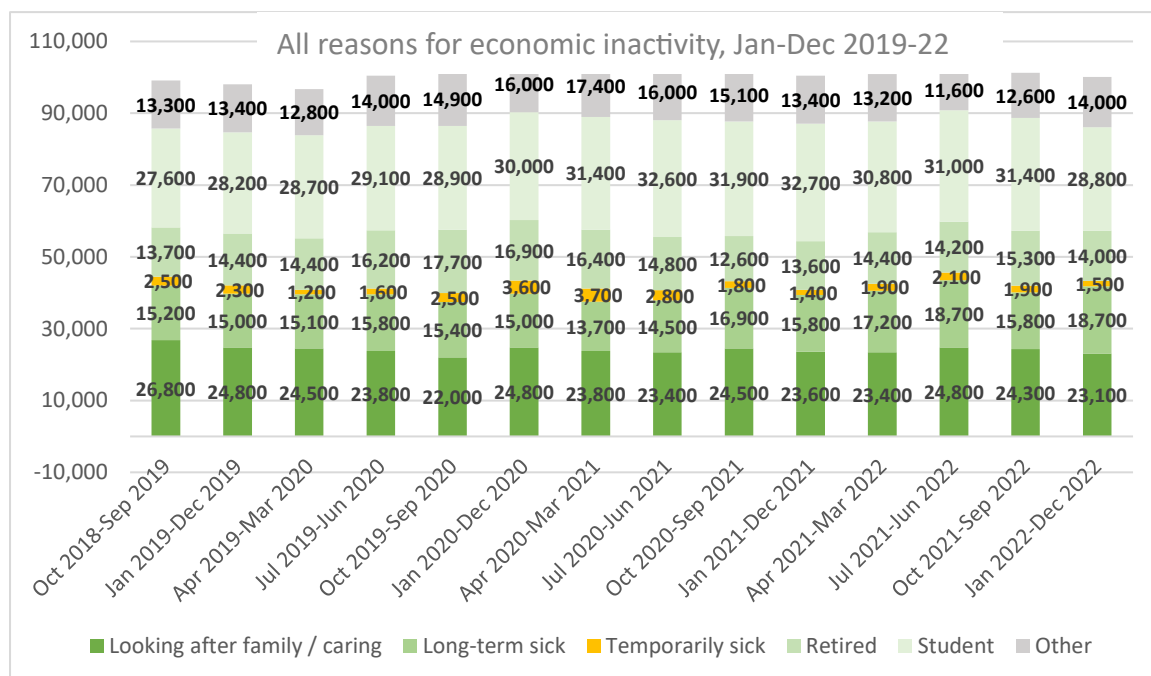
In considering wider employment deprivation (excluded from the workplace due to unemployment, sickness or disability, or caring responsibilities), the combined number is currently hovering around the 70,000 level (9-10% of the working-age population).



Source: ONS *Annual Population Survey*

The combined economically inactive pool in Berkshire increased over a 3-year period (2019-22) by 2,200 (2.2%), from 99,100 to 101,300. This represented 18% of the working-age population (16-64).

Two key pandemic related trends emerge. Firstly, the rise in the number of home-based **full-time students** attending local facilities and/or remote learning was to be expected during the pandemic but has continued through into January-December 2022. This brings an opportunity for Berkshire employers, if they can harness the potential of an increased pool after they have remained local for their studies. Secondly, whilst the number of **working-age retirees** has fluctuated over the past 3 years, as shown below, there was an increase of 1,600 (12%) in the year to September 2022 compared to the year to September 2019.



Source: ONS *Annual Population Survey*

2.7 Deprivation

The last full analysis of the extent of and underpinning contributors to deprivation is from 2019⁶. This showed that Berkshire ranked 35th out of 38 LEP districts in terms of income deprivation, 35th for employment, 34th for living environment and 34th for education deprivation in 2019 and therefore has low deprivation levels.

The Census, from March 2021, shows that 11.0% of Berkshire households were deprived in two dimensions compared to 14.2% for England.

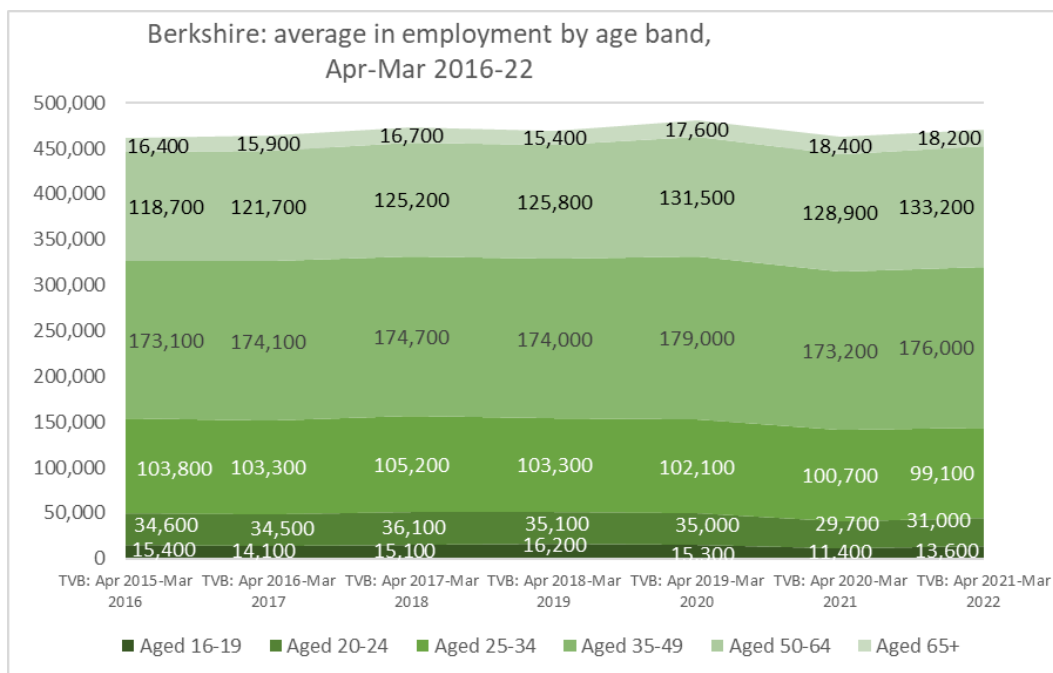
⁶ <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019>

	% of households deprived in any dimension	% Households deprived in one dimension	% Households deprived in two dimensions	% Households deprived in three dimensions	% Households deprived in four dimensions
England	51.6%	33.5%	14.2%	3.7%	0.2%
Berkshire (whole)	45.3%	31.6%	11.0%	2.5%	0.2%
Reading	48.8%	32.2%	12.8%	3.5%	0.3%
Slough	57.7%	36.6%	16.4%	4.4%	0.3%
Bracknell Forest	43.6%	31.1%	10.2%	2.1%	0.2%
Wokingham	38.5%	29.2%	8.0%	1.3%	0.1%
Windsor & Maidenhead	41.0%	29.8%	9.4%	1.8%	0.1%
West Berkshire	44.0%	31.6%	10.2%	2.0%	0.1%

Source: ONS, *Census 2021*

3.0 Employment

The total employed numbers of people in Berkshire increased by 9,100 (2.0%) up to March 2022 from March 2016.



Source: ONS *Annual Population Survey*

It can be seen in the table above that the 16 to 49 averages in employment reduced by 7,200 (2.2%) from 2015-16 to 2021-22 – from 326,900 (70.8% of the employed workforce) to 319,700 (67.9%). Conversely, the 50+ population in employment increased by 16,300 (12.1%) - from 135,100 (29.2%) in 2015-16 to 151,400 (32.1%) in 2021-22. Perhaps not surprisingly, this trend mirrors that of the working age population covered above and confirms that, similar to the ageing population, the current workforce is ageing which may give rise to future skills shortages and a tightening employment market.

3.1 Future Workforce Pipeline

The future workforce pipeline of the 0-15 age group had been slowly increasing in recent years, but it dropped back to close to 2017 levels in the year to mid-2021. This is a likely result of in-county migration (driven by remote working options due to the pandemic) and overseas migration (driven by the pandemic and Brexit).

With the last Local Authority level population forecasts published in 2018 and the significant impacts from the pandemic, a post-pandemic update is awaited. However, forecasts for future growth in the population for 16–17-year-olds show three years of consecutive growth through to mid-2021 and show a further increase through to mid-2022 (see table below). Beyond this, the increases vary by locality, but it can be seen below that three Unitaries are forecasting increases of around 19% or greater in the review period up to 2030.

	Mid-year 2021	Mid 2022 (ONS)	Forecast peak year of growth	Forecast peak year growth (#: from 2022)	Forecast peak year growth (%: from 2022)
Bracknell Forest	3,168	3337	2025	149	4.5%
Reading	3,574	3568	2030	989	27.7%
Slough	4,234	4384	2028	875	20.0%
West Berkshire	4,066	4153	2024	210	5.1%
Windsor & Maidenhead	4,260	4360	2022	No growth	0.0%
Wokingham	4,412	4458	2027	836	18.8%
Total	23,714	24,240			

Source: DfE *Post-16 Capacity Fund*, *ONS Population Projections by LA district*⁷

Whilst these increases should positively impact the local labour market, they are likely to mitigate the ageing population and potential future skills shortages and increased competition only partly for workers in certain industries as covered above.

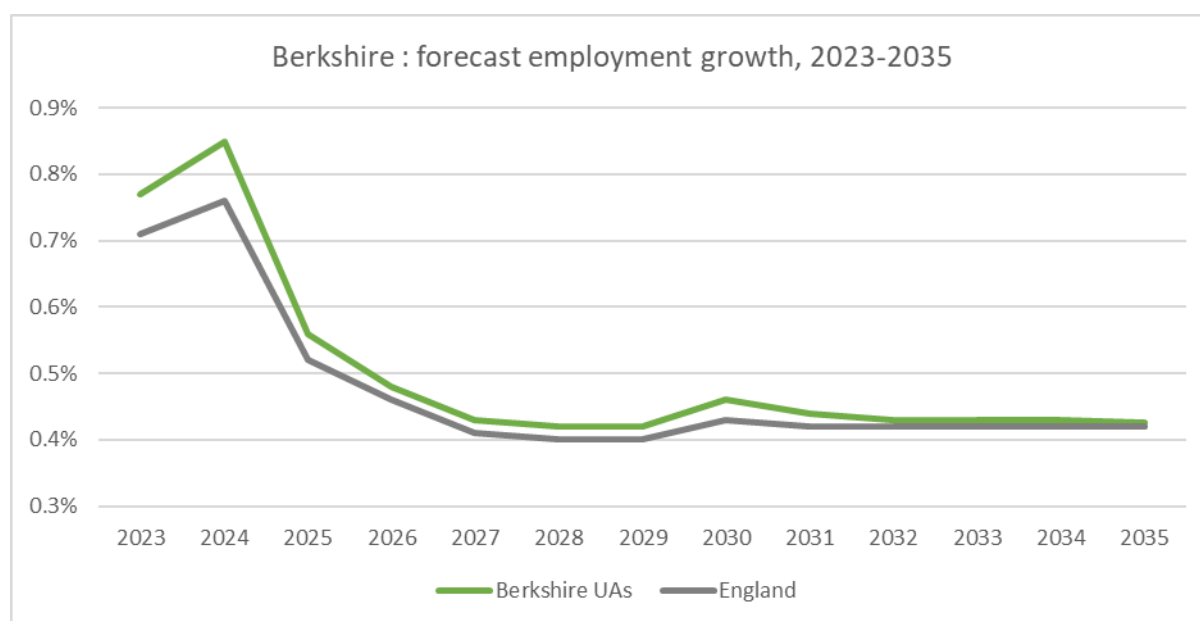
3.2 Future Demand for Jobs in Berkshire

The forecast employment growth in Berkshire⁸ is higher than the national average, estimated as growth of 6% by 2035, compared to c.5% nationally. This growth rate is ranked 15th of the 38 LSIPs.

After peaking at 0.8% annual growth in 2024, employment growth across Berkshire is forecast to decline through to 2027, after which it is projected to grow by just over 0.4% annually through to 2035. This is an increase of 47,000 by 2035 compared to 2020. In addition to the 47,000 net increase, replacement demand is forecast at 287,000 between 2020-2035 thereby giving a total demand of 334,000 for new or replacement workers.

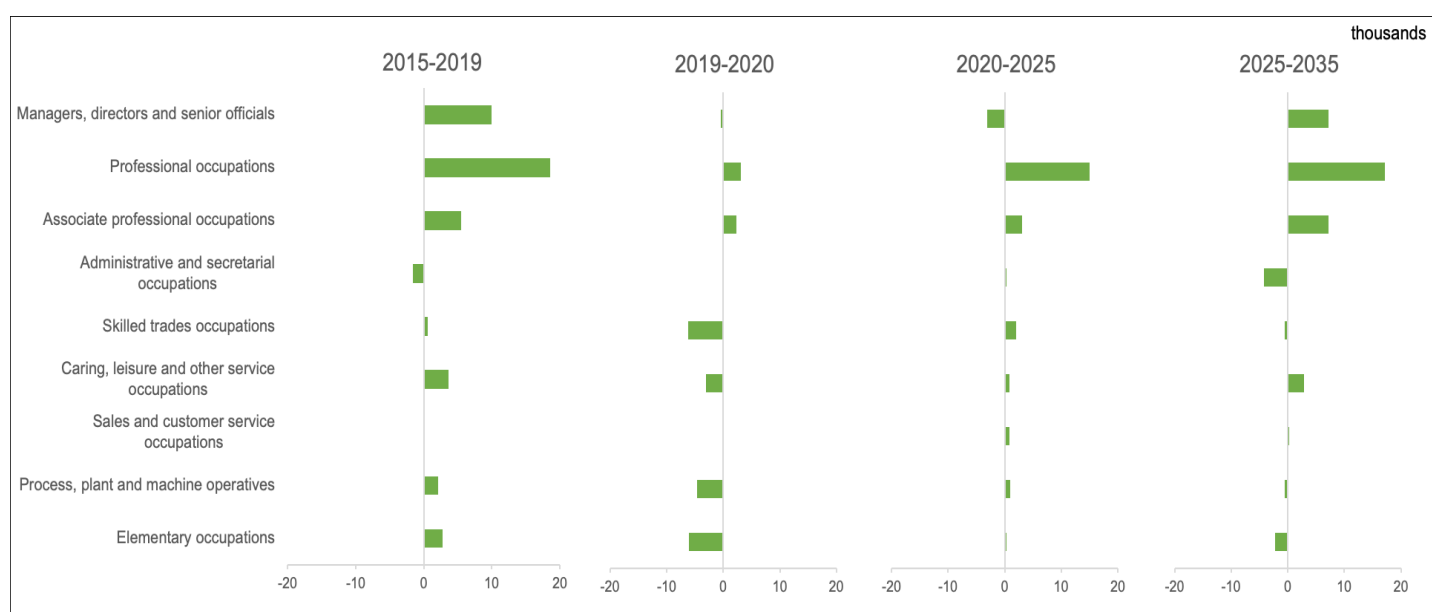
⁷ <https://explore-education-statistics.service.gov.uk/find-statistics/national-pupil-projections>

⁸ <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>



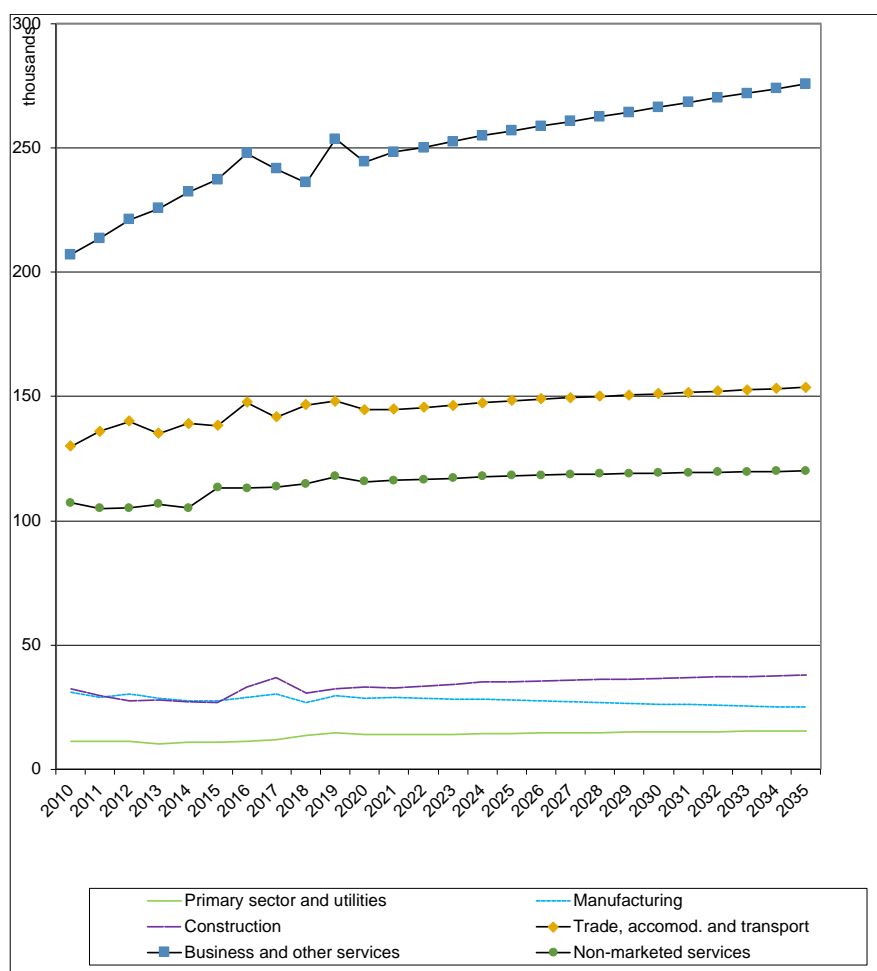
Source: **Skills Imperative 2035**

Jobs growth has, in recent years, been at the Professional / Associate Professional end of the spectrum. Moreover, this trend is forecast to continue through to 2035.

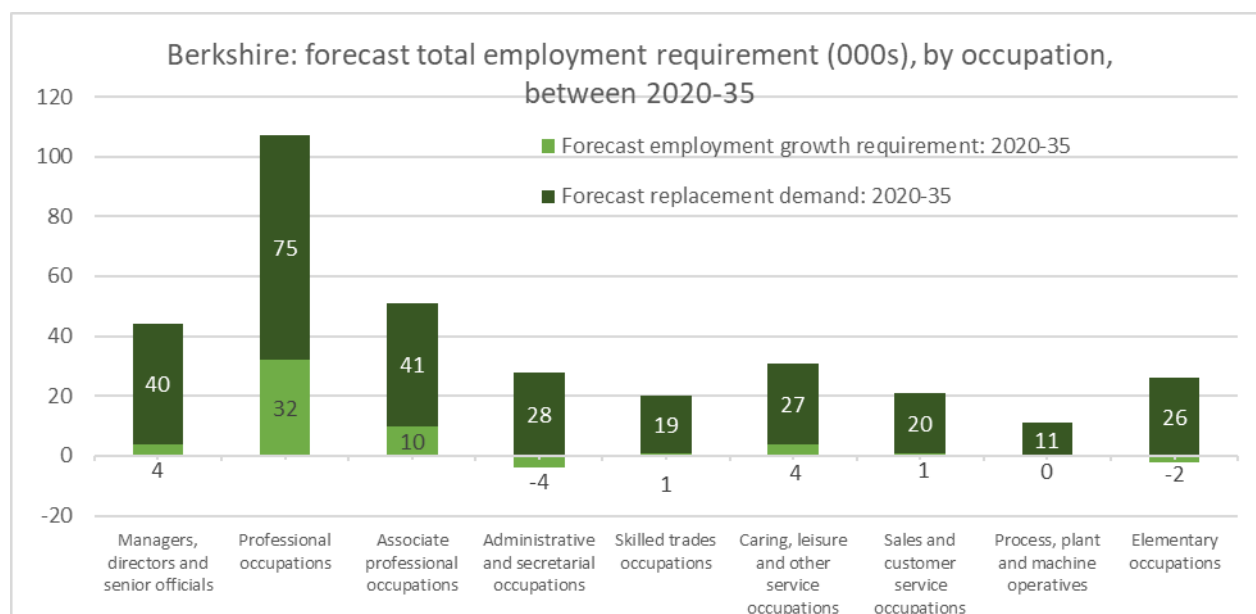


Source: **Skills Imperative 2035**

It is forecast demand within the Business & Other Services sector that is driving employment growth.



Source: **Skills Imperative 2035⁹**



Source: **Skills Imperative 2035**

This level of employment growth and replacement demand is unsurprising given Berkshire's ranking of 3rd overall amongst LEP regions in the FDI Intelligence's **European Cities and Regions 2022/23** report¹⁰,

⁹ <https://nfer.ac.uk/key-topics-expertise/education-to-employment/the-skills-imperative-2035/publications/>

¹⁰ <https://www.fdiintelligence.com/content/rankings-and-awards/european-cities-and-regions-of-the-future-20222023-winners-80707>

including ranking 3rd for Economic Potential. As such, Berkshire-based employers are hugely reliant upon the local education and training provision to prepare and upskill local workers to meet their future needs.

Section B Industry and Businesses in Berkshire

1.0 Summary

This section reviews the jobs profile across Berkshire on both a sector and occupational basis. It also reviews business output (GVA), business sizes and the trends in jobs recruitment via analyses of job postings. A summary of the findings and their impact on the LSIP and roadmap in the main report is as follows:

Almost a quarter (24.8%) of Berkshire's GVA is derived from the Information and Communication sector. This sector has grown exponentially in importance over the last decade (from 10.9% of GVA in 2011).¹¹

When combined with the other sectors of Wholesale/Retail (9.9%), Real Estate (10.5%) and Professional, Scientific & Technical Activities (10.0%), Berkshire derives 55% of its GVA from just four industries.

Berkshire achieved the highest GVA per job filled of any Enterprise region in 2020, rising above London again for the first time since 2013. In terms of the longer-term forecast covering the period 2024-26, EY forecasts GVA growth¹² covering the period 2024-26 of 2.4% across the wider Thames Valley region and 2.7% in Reading. And from an employment perspective, it forecasts 1.7% growth for Reading and 1.3% for the wider Thames Valley region. These forecasts are at the highest end relative to other UK regions.

The significant majority of enterprises on the Business Register¹³, as of March 2022, were micro (89.8%) or small (7.8%). However, there were 785 (1.8%) medium sized and 260 (0.6%) large enterprises headquartered in Berkshire. Therefore, overall, there is a high concentration of SMEs, which account for more than 99% of all businesses in the County.

There was a 15.3% increase between 2019 and 2022 in the number of enterprises operating within Transportation & Storage, a likely result of the increased pandemic-related need within logistics and eCommerce.

Job posting levels clearly indicate a challenging climate for Berkshire-based employers and much more so than prior to the pandemic. The top job postings for 2019 and 2022 show increases that are consistent with the growing employee workforce numbers highlighted in Professional, Scientific & Technical, Information & Communication and Care.

Berkshire employment is highly dependent on the Information and Communication sector with 14.4% of the total jobs forecast in 2022 versus 4.7% in England. There are also proportionally many more jobs in the Professional, Scientific, and Technical sector, which has an LQ of 1.3 and these are forecast to have grown by 10,000 (20%) in the 5-year period to 2022. The main jobs within these sectors are in Legal, Accounting, Management Consultancy, Architectural & Engineering, Scientific Research and Development and Advertising and Market Research.

There were forecast job increases in the 5-year period to 2022 in Screen Industries (Motion Picture, Video and TV Programme Production) of 1,700 (164%). Construction is estimated to have grown over the period by 1,400 (7%), particularly in the area of Civil Engineering. Human Health & Social Work jobs are estimated to have increased by 900 (2%).

The Location Quotients (LQs)¹⁴ show there are 1.2 times the number of Corporate Managers and Directors compared to England as a whole. It can also be seen that there are 1.9 times the number of Science, Research, Engineering and Technology Professionals, 1.4 times the Science, Engineering and Technology Associate Professionals and 1.1 times the Business and Public Service Associate Professional.

¹¹

<https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedbalancedbycombinedauthoritycityregionsandothereconomicandenterpriseregionsoftheuk>

¹² <https://info.ey.com/UKI-UK-ALL-WB-2022-01-27-EY-UK-Regional-Economic-Forecast-Report.html>

¹³ <https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/ukbusinessactivitysizeandlocation/2021>

¹⁴ Lightcast data TV Berkshire LEP

The number of Health and Social Care Professionals is low relative to England as a whole with an LQ of 0.8. This may create significant future challenges with the ageing population and workforce. Skilled Construction and Building Trades and Transport and Mobiles Drivers and Operatives also have low LQs of 0.8.

The pandemic has fundamentally changed where work is performed in Berkshire. As at March 2021, 41% were working primarily from home, compared to 32% across England. This ranged from 27% in West Berkshire to 48% in Windsor & Maidenhead. Whilst numbers will have diminished since then, working from home has become the preferred work location for many of those who can. This impacts workers' preparedness to travel to a fixed work location and increases work opportunities from outside the County from employers who are prepared to accommodate remote working and also for inside the County from workers living further afield.

The identified issues or changes required include:

Forecast business growth is likely to require more skilled labour, at a time when there is a tightening labour market with skills shortages and increased competition for workers in certain industries. Further, in order for production to remain competitive many businesses are dependent on greater automation and the use of new technologies and a highly skilled IT workforce.

There are particularly low LQs in the priority sectors of Health, Construction and Haulage and Logistics.

Because of the predominance of SMEs, employer demand is fragmented, and opportunities are needed to bring employers together with sector bodies and educational providers in order to seek to appropriately meet future business needs.

Many of the dominant sectors in Berkshire (particularly Professional, Scientific & Technical Activities, Information & Communication) are changing through digitalisation and new technologies and have increasing demands for skills through growth and transformation.

The Information and Communication sector has an LQ of 3.1. This is both a strength and a potential vulnerability, due to the relative ease and risk of tech jobs being performed remotely, outside Berkshire.

2.0 Berkshire Jobs Overview

The average 'all in employment' figure for Berkshire across the year to September 2022 was 474,000. This increased by around 2% over the preceding 6-year period.

Across the year to September 2022, the 474,000 people in employment in Berkshire were engaged in an average of 509,000 employee jobs.

The 474,000 'all in employment' had the following characteristics:

- 13.2% were self-employed workers, broadly consistent with the national average.
- 3.7% (17,400) of people officially had two or more jobs, being 600 higher than the 16,800 in the year to September 2019.
- 22.4% worked part-time, down from 24.1% three years earlier.
- 9.7% were aged up to 24, down from 10.9% three years earlier.
- 32.8% were aged 50+, up from 30.6%.

The pandemic has fundamentally changed where work is performed in Berkshire. As at March 2021, 41% were working primarily from home, compared to 32% across England. This ranged from 27% in Slough to 48% in Windsor & Maidenhead.¹⁵ Whilst numbers will have diminished since then, working from home has become the preferred work location for many of those who can. This impacts workers' preparedness to

¹⁵ UK 2021 Census

travel to a fixed work location and increases work opportunities from outside the region from employers who are prepared to accommodate remote working.

In terms of how the total number of jobs translate into the job density ratios (the ratio of total jobs to the resident population aged 16-64), whilst they had largely been increasing through to 2019, they tailed off in the pandemic years 2020 and 2021 and this is likely to be, in part, due to population increase and increase in economic activity noted above.

2.1 Sector Jobs Analysis

Using the Standard Industrial Classification (**SIC**), Berkshire's employment patterns in both 2017 (actual data) and 2022 (based on Lightcast's extrapolated data published through to the end of Q3) are shown below in descending order of total jobs.

J	Information and Communication	68,886	73,175	6%	5%	14.4%	4.7%	3.1
G	Wholesale and Retail Trade	80,071	69,044	-14%	-4%	13.6%	14.5%	0.9
M	Professional, Scientific and Technical Activities	52,006	62,160	20%	7%	12.2%	9.3%	1.3
N	Administrative and Support Service Activities	49,017	47,734	-3%	-2%	9.4%	9.1%	1.0
P	Education	44,522	46,224	4%	1%	9.1%	9.0%	1.0
Q	Human Health and Social Work Activities	44,748	45,673	2%	6%	9.0%	13.6%	0.7
I	Accommodation and Food Service Activities	30,990	30,712	-1%	-6%	6.0%	6.9%	0.9
C	Manufacturing	26,275	28,249	8%	-6%	5.6%	7.5%	0.7
F	Construction	21,225	22,621	7%	1%	4.4%	4.8%	0.9
H	Transportation and Storage	21,984	19,243	-12%	11%	3.8%	5.3%	0.7
R	Arts, Entertainment and Recreation	13,086	12,126	-7%	-17%	2.4%	2.1%	1.1
O	Public Administration and Defence; Compulsory Social Security	11,177	11,180	0%	13%	2.2%	4.4%	0.5
K	Financial and Insurance Activities	10,099	10,513	4%	-1%	2.1%	3.5%	0.6
S	Other Service Activities	12,912	9,592	-26%	-10%	1.9%	1.8%	1.0
L	Real Estate Activities	7,071	8,556	21%	13%	1.7%	1.9%	0.9
E	Water Supply; Sewerage, Waste Management and Remediation Activities	5,931	6,697	13%	4%	1.3%	0.7%	1.9
D	Electricity, Gas, Steam and Air Conditioning Supply	3,076	3,499	14%	-1%	0.7%	0.4%	1.7
A	Agriculture, Forestry and Fishing	1,473	1,483	1%	4%	0.3%	0.6%	0.5
B	Mining and Quarrying	190	245	28%	11%	0.0%	0.1%	0.6
		504,738	508,725	1%	1%	100.0%	100.0%	

Source: Lightcast

There are six core sectors (first 6 listed) that provide the majority (67.6%) of jobs in Berkshire. These are: Information & Communication (14.4%), Wholesale and Retail Trade (13.6%), Professional, Scientific & Technical (12.2%), Administrative & Support Services (9.4%), Education (9.1%) and Human Health & Social Work (9.0%).

A comparison with the England data also shows the extent to which Berkshire is dependent on employment within the Information and Communication sector (14.4% versus 4.7%). This is because Berkshire is the UK headquarters of many major tech companies, who have set up their headquarters in the Thames Valley, including Microsoft, Oracle, Huawei, Cisco Systems and Symantec. This is also explicit in the Location Quotient (LQ) above, which compares the concentration of each sector in Berkshire to the concentration of the sectors in England. The Information and Communication sector has an LQ of 3.1. This is both a strength and a potential vulnerability, due to the relative ease and risk of tech jobs being performed remotely, outside Berkshire.

The other high LQ that stands out is Professional, Scientific, and Technical, with an LQ of 1.3. The main jobs within these sectors are in Legal, Accounting, Management Consultancy, Architectural & Engineering, Scientific Research and Development and Advertising and Market Research.

Whilst there was a total increase of approximately 4,000 jobs forecast over the 5-year period to 2022, equating to 1%, a number of significant changes in sub-sectoral activity over that period are forecast to have occurred:

- Professional, Scientific & Technical industries is estimated to have grown by 20% - more than 10,000 jobs over the period. These included gains within Legal & Accounting of 3,900 (48%), Activities of Head Offices & Management Consultancy of 5,400 (31%) and Architectural & Engineering Activities of 2,900 (44%).
- Information & Communication industries is estimated to have grown by 4,300 (6%) over the five-year period. This included forecast gains within Screen Industries (Motion Picture, Video and TV Programme Production) of 1,700 (164%), the Telecoms sector of 2,100 (12%) and Computer Programming, Consulting & Related Activities of 900 (2%).
- Manufacturing is estimated to have grown by 2,000 (8%), particularly in the area of pharmaceuticals.
- Construction is estimated to have grown by 1,400 (7%).

And even within sectors where the estimated overall rise in the number of jobs was relatively small, there were notable sub-sectoral changes:

- Human Health & Social Work. The total number of jobs was estimated to have increased by just 900 (2%), but within this there were increases in the number of jobs in Hospital Activities of 1,900 (11%), Residential Care of 3,400 (57%), which were offset by declines within Social Work Activities (without Accommodation) of 3,000 (25%).

Amongst the sectors experiencing overall losses, the number of jobs in Wholesale and Retail Trade is estimated to have declined by an estimated 11,000 (14%) and included the loss of 3,000 (10%) Wholesale (excl. Motor) jobs and 7,600 Retail (excl. Motor) posts. There was also a 2,700 (12%) estimated fall in the number of jobs within Transportation & Storage, which included 1,600 (27%), within Land Transport and 1,300 (16%) in Warehousing and Support Activities for Transportation.

2.2 Occupational Jobs Analysis

The Standard Occupational Code (SOC) analysis over the 5-year period estimated up to 2022 is shown below, similar to the previous SIC code analysis.

SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 % Berkshire Change	2017-2022 % England Change	Berkshire % Split 2022	England % Split 2022	LQ
92	Elementary Administration and Service Occupations	54,789	53,371	-3%	0%	10.5%	11.7%	0.9
21	Science, Research, Engineering and Technology Professionals	51,990	52,691	1%	3%	10.4%	5.5%	1.9
35	Business and Public Service Associate Professionals	47,853	49,500	3%	1%	9.7%	8.5%	1.1
41	Administrative Occupations	45,506	47,447	4%	2%	9.3%	9.6%	1.0
11	Corporate Managers and Directors	43,720	44,910	3%	1%	8.8%	7.6%	1.2
71	Sales Occupations	31,765	29,768	-6%	-3%	5.9%	6.4%	0.9
61	Caring Personal Service Occupations	29,930	29,562	-1%	-1%	5.8%	7.0%	0.8
24	Business, Media and Public Service Professionals	22,955	25,287	10%	3%	5.0%	5.2%	1.0
23	Teaching and Educational Professionals	22,478	22,671	1%	-1%	4.5%	4.3%	1.0
52	Skilled Metal, Electrical and Electronic Trades	17,787	18,034	1%	2%	3.5%	3.4%	1.1
22	Health Professionals	15,658	15,475	-1%	6%	3.0%	4.5%	0.7
82	Transport and Mobile Machine Drivers and Operatives	14,516	13,690	-6%	4%	2.7%	3.5%	0.8
42	Secretarial and Related Occupations	13,092	12,935	-1%	0%	2.5%	2.6%	1.0
72	Customer Service Occupations	12,745	12,801	0%	0%	2.5%	2.3%	1.1
31	Science, Engineering and Technology Associate Professionals	11,925	12,559	5%	2%	2.5%	1.8%	1.4
12	Other Managers and Proprietors	11,949	11,903	0%	0%	2.3%	2.5%	0.9
54	Textiles, Printing and Other Skilled Trades	9,509	9,652	2%	-1%	1.9%	2.2%	0.8
81	Process, Plant and Machine Operatives	9,212	9,185	0%	-2%	1.8%	2.5%	0.7
34	Culture, Media and Sports Occupations	7,101	7,851	11%	0%	1.5%	1.4%	1.1
62	Leisure, Travel and Related Personal Service Occupations	8,472	7,576	-11%	-4%	1.5%	1.7%	0.9
53	Skilled Construction and Building Trades	5,770	5,850	1%	0%	1.1%	1.5%	0.8
91	Elementary Trades and Related Occupations	6,081	5,804	-5%	-1%	1.1%	1.7%	0.7
32	Health and Social Care Associate Professionals	5,423	5,573	3%	3%	1.1%	1.4%	0.8
33	Protective Service Occupations	2,602	2,451	-6%	4%	0.5%	0.9%	0.6
51	Skilled Agricultural and Related Trades	1,911	2,179	14%	-7%	0.4%	0.5%	0.9
		504,739	508,725	1%	1%	100%	100%	

Source: Lightcast

Berkshire has high proportions in major occupational groups 1-3 (Managers/Directors, Professionals and Associate Professionals). At a combined 49% across the year to September 2022, this is higher than the national average of 43%.

The Location Quotient (LQ) further confirms this, with there being 1.2 times the number of Corporate Managers and Directors compared to England as a whole. It can also be seen that there are 1.9 times the number of Science, Research, Engineering and Technology Professionals, 1.4 times the Science, Engineering and Technology Associate Professionals and 1.1 times the Business and Public Service Associate Professional.

It can also be seen that the largest occupational group is for Elementary Administration and Service Occupations although it is estimated to have declined slightly over the period by 1,400 (3%). In contrast, within the next four largest groups, numbers are forecast to have increased over the five-year period by the following proportions:

- Science, Research, Engineering and Technology Professionals by 700 (1%)
- Business and Public Service Associate Professionals 1,600 (3%)
- Administrative Occupations 1,900 (4%)
- Corporate Managers and Directors: 1,200 (3%)

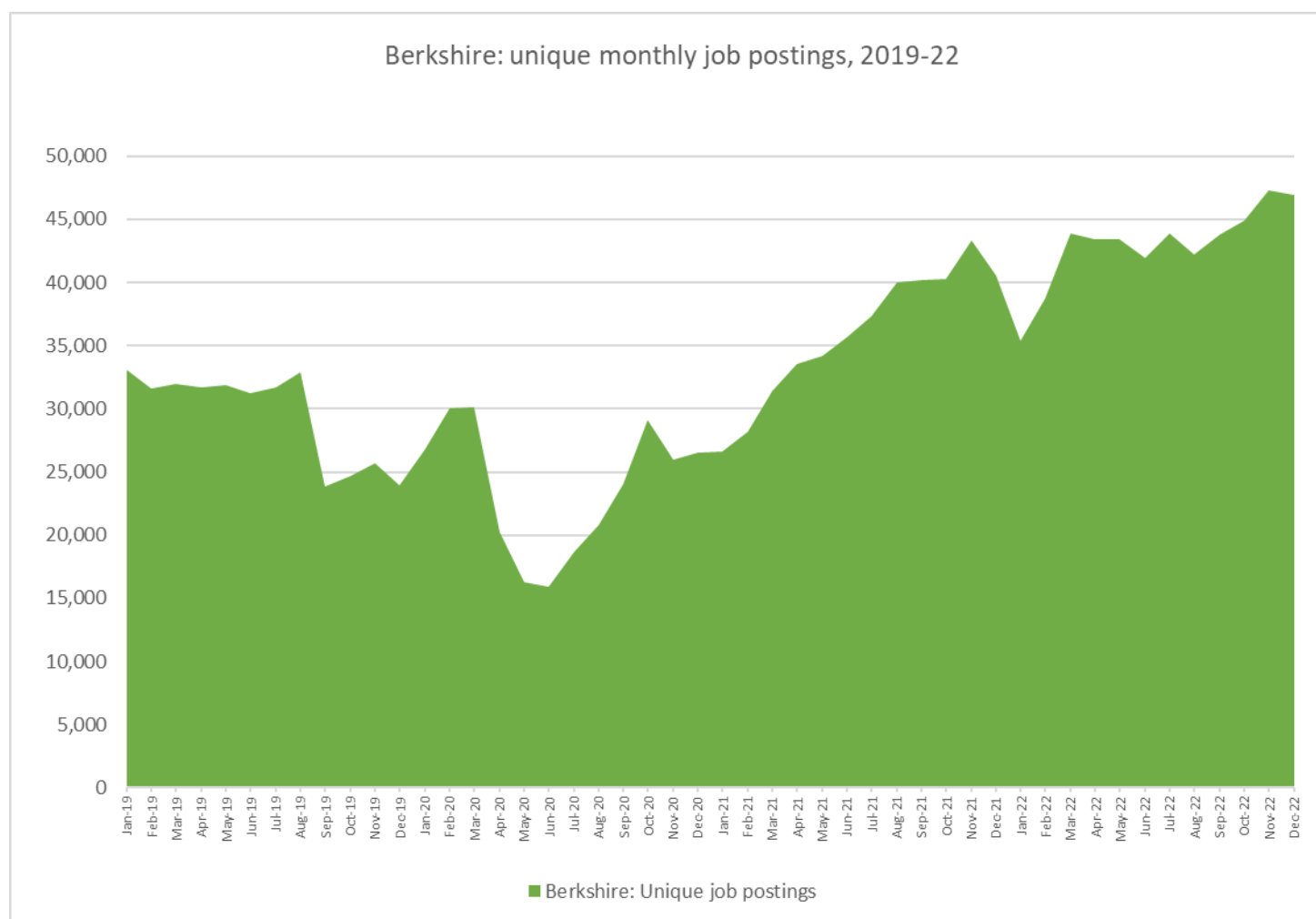
There was also a significant increase in the number of Business, Media, and Public Service Professionals by 2,300 (10%) and Culture, Media & Sports Occupations by 800 (11%).

In contrast, there were estimated falls in the numbers of Sales Occupations by 2,000 (6%) and Leisure, Travel & Related Personal Service Occupations of 900 (11%). The latter were mainly for cleaners and hairdressers. These falls may be due to either decreased demand and/or unfilled vacancies.

It can also be seen that the number of Health and Social Care Professionals is low compared to England as a whole with an LQ of 0.8. This may create significant future challenges with the ageing population and workforce. Skilled Construction and Building Trades and Transport and Mobiles Drivers and Operatives also have low LQs of 0.8.

2.3 Job Vacancies

Job posting levels clearly indicate a challenging climate for Berkshire-based employers in 2022 and much more so than prior to the pandemic.



Source: Lightcast 2023

More detail on the identified priority sectors is included in the following section.

There are some key occupational areas of consistent challenging and/or growing need as shown below. Moreover, they are consistent with the growing employee workforce numbers highlighted above in Professional, Scientific & Technical, Information & Communication and Care.

Percentage of unique job postings	Total unique job postings: 2019	Total unique job postings: 2022	2019-2022 change	2019-2022 change %
Chartered and Certified Accountants	3,625	4,380	755	20.8%
Bookkeepers, Payroll Managers & Wages Clerks	8,924	10,181	1,257	14.1%
Personal Assistants and Other Secretaries	3,760	4,144	384	10.2%
Financial Accounts Managers	2,872	3,097	225	7.8%
Plumbers & Heating & Ventilating Engineer	1,538	1,653	115	7.5%
Quality Assurance and Regulatory Professionals	1,456	1,556	100	6.9%
Call and Contact Centre Occupations	1,436	1,498	62	4.3%
Web Design and Development Professionals	1,545	1,603	58	3.8%
Hairdressers and Barbers	1,293	1,340	47	3.6%
Purchasing Managers and Directors	1,219	1,262	43	3.5%
Care Workers and Home Carers	8,751	9,026	275	3.1%
Management Consultants and Business Analysts	3,781	3,895	114	3.0%
Programmers & Software Development Profs	12,984	13,373	389	3.0%
Telecommunications Engineers	2,080	2,128	48	2.3%
Restaurant & Catering Managers & Proprietors	1,583	1,619	36	2.3%
Production Managers & Directors in Manufacturing	4,804	4,898	94	2.0%
Cooks	1,291	1,316	25	1.9%
Chief Executives and Senior Officials	1,373	1,399	26	1.9%
Engineering Professionals n.e.c.	1,967	1,999	32	1.6%
Metal Working Production and Maintenance Fitters	2,445	2,482	37	1.5%

Source: Lightcast 2023

3.0 Berkshire Gross Value Added (GVA) Output¹⁶

Berkshire's GVA output was £43.7bn in the year 2020 which was a fall of 6.2% on the previous year mainly as a consequence of the pandemic. Prior to that, it had grown at an average of 3.7% per annum in the previous decade, with only one marginal fall of 0.5% in 2009. It subsequently rebounded by 5.9% in 2021 to £46.3bn.

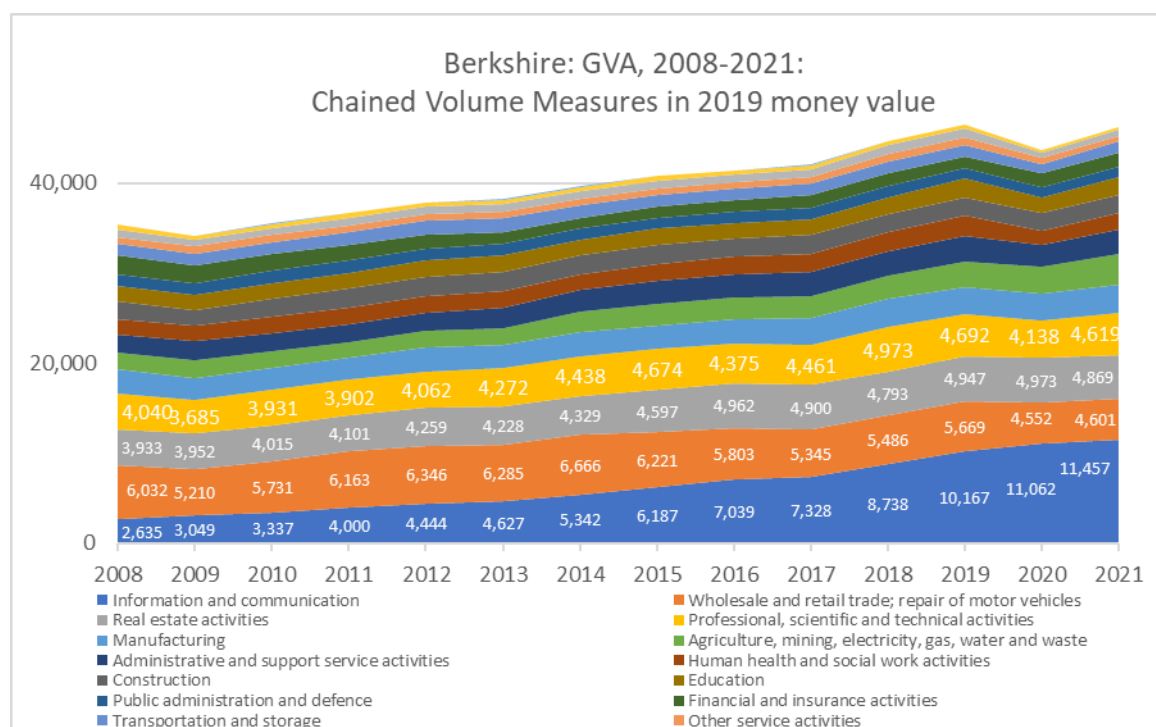
Almost a quarter (24.8%) of Berkshire's GVA is derived from the Information and Communication sector. This sector has grown exponentially in importance over the last decade (from 10.9% of GVA in 2011). Moreover, contrary to most sectors, output from the sector grew by 1.2% in the first year of the pandemic.

When combined with the other sectors of Wholesale/Retail (9.9%), Real Estate (10.5%) and Professional, Scientific & Technical Activities (10.0%), Berkshire derives 55.2% of its GVA from just four industries.

The GVA trend by industry is shown below.

¹⁶

<https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedbalancedbycombinedauthoritycityregionsandothereconomicandenterpriseregionsoftheuk>



Source: ONS, **Regional GVA balanced by Industry, City and Enterprise Region, 2023**

Whilst the 2021 comparators are yet to be published, Berkshire achieved the highest GVA per job filled of any Enterprise region in 2020, rising above London again for the first time since 2013. At £83,184 per job filled in 2020 (current price, unsmoothed), this was 44.4% above the UK average. And per hour worked, Berkshire's £54.50 continued to exceed that in London (£53.70) and was 36.4% above the UK average. Both were higher than in neighbouring Oxfordshire (at £56,514 and £39.70, respectively).

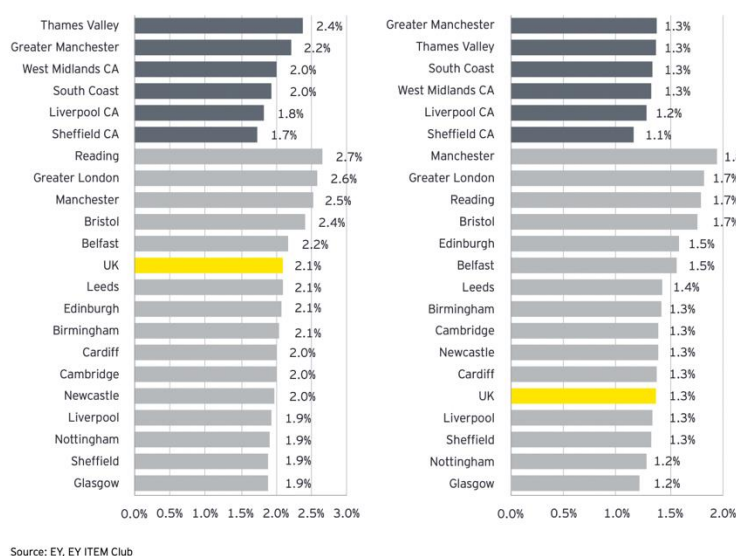
Future forecasts from EY for 2022¹⁷ show optimistic signs of recovery, however, for the Thames Valley region (Berkshire, Oxfordshire, Buckinghamshire and parts of North Hampshire, Surrey, and Middlesex), at 3.2% year-on-year growth, and Reading, in particular (7.3%). Moreover, when indexed back to pre-pandemic in 2019, EY forecasts that Reading's GVA will top the major cities profiled (at 103.9%) in 2022, whilst the combined Thames Valley region will index at 101.0%.

For 2023, Reading tops EY forecasts for GVA growth (at 0.7%), whilst employment is forecast to rise by 0.5%. In contrast, forecasts for the wider Thames Valley region are less optimistic, suggesting a decline of 0.6% in GVA and a 0.3% fall in employment.

The longer-term forecast covering the period 2024-26 is shown below where it can be seen that EY forecasts GVA growth of 2.4% across the Thames Valley region and 2.7% in Reading. And from an employment perspective, it forecasts 1.7% growth for Reading and 1.3% for the wider Thames Valley region. It can be seen that these growth forecasts are at the highest end relative to other UK regions.

¹⁷ https://www.ey.com/en_uk/growth/ey-item-club/how-the-uk-economic-recovery-can-overcome-the-current-headwinds

Figure 14 and 15: GVA and employment growth in major cities – 2024 to 2026 average growth

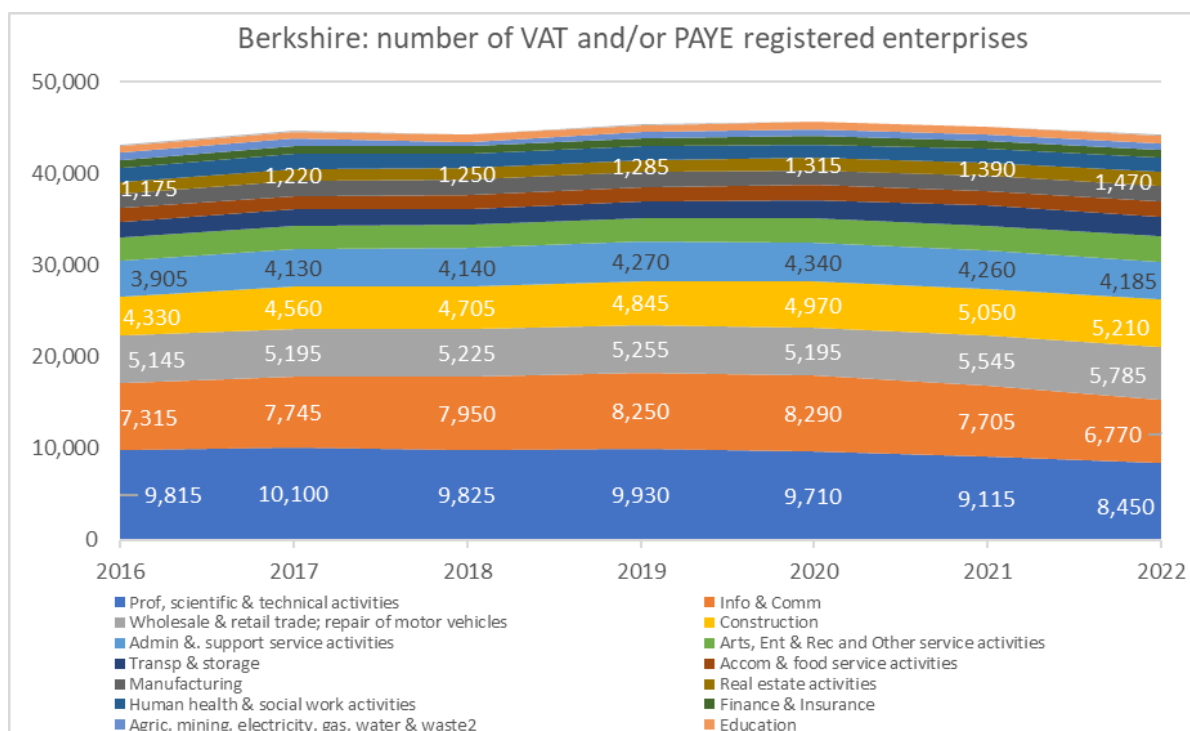


Source: EY Item Club, **Regional UK Economic Forecasts**, February 2023¹⁸

4.0 Number and Sizes of Berkshire Businesses¹⁹

In terms of the number of underpinning businesses driving output, the number of enterprises registered for VAT and/or PAYE in Berkshire hovers around 45,000. In addition, there are c.50,000 unregistered enterprises (based on estimates modelling from the Business Population Estimates for the South East).

More than two thirds (68.8%) of enterprises operate within just five sectors as shown below: Professional, Scientific & Technical Activities (19.1%), Information & Communication (15.3%), Wholesale/Retail (13.1%), Construction (11.8%) and Business Admin & Support Services (9.5%).



¹⁸ https://www.ey.com/en_uk/webcasts/2023/ey-uk-regional-economic-forecast-webcast-2023

¹⁹ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>

In terms of the changes between 2019 and 2022 (post-pandemic), despite there being significant increases in the numbers of jobs in Professional, Scientific Activities and the Information and Communication sectors, there were declines of 14.9% and 17.9%, respectively, in the number of enterprises in these areas. Both of these sectors will likely have in some way been impacted by the change in the private sector Off-Payroll working protocols in April 2021, which saw a significant reduction in the number of individuals working through Personal Service Companies (PSCs). In contrast, there was a 15.3% increase in the number of enterprises operating within Transportation & Storage, a likely result of the increased pandemic-related need within logistics and eCommerce.

In looking more widely at business births and deaths, the number of the former plateaued across 2017-2019 before declining through 2020 and 2021. In contrast, the proportion of business deaths remained broadly similar across 2017-2020 but rose in 2021, which is likely due to the pandemic.

The significant majority of enterprises on the Business Register, as of March 2022, were micro (89.8%) or small (7.8%). However, there were 785 (1.8%) medium sized and 260 (0.6%) large enterprises headquartered in Berkshire. Therefore, overall, there is a high concentration of SMEs, which account for more than 99% of all businesses in Berkshire.

Number of VAT and/or PAYE registered enterprises, early 2022	Micro (0-9 employees)	Small (10-49 employees)	Medium (50-249 employees)	Large (250-499 employees)	Large (500-999 employees)	Large (1000+ employees)
Bracknell Forest	4,105	340	85	15	10	15
Reading	5,935	620	140	25	10	20
Slough	5,915	465	135	20	15	15
West Berkshire	7,430	725	150	15	10	5
Windsor & Maidenhead	8,490	695	150	25	10	10
Wokingham	7,800	630	125	15	20	20
Berkshire	39,675	3,475	785	110	70	80

Source: ONS, *UK Business Counts 2022* (NB: numbers are rounded to the nearest 5)

The majority (62%) of the medium and large enterprises within Berkshire operate within five sectors: Information & Communication (a combined 170), Wholesale & Retail, & vehicle repair (140), Administration & Support Services (120), Education (115) and Professional, Scientific & Technical sectors (105).

5.0 Inward Investment²⁰

In terms of how inward investment was impacted by the pandemic and the UK's departure from the EU, the Department for International Trade identified 29 single site Foreign Direct Investment (FDI) projects within Berkshire across 2021 and 2022, with aggregate new jobs potential of 1,270.

²⁰ <https://www.gov.uk/government/statistics/departments-for-international-trade-inward-investment-results-2021-to-2022/departments-for-international-trade-inward-investment-results-2021-to-2022-html-version>

Section C Education and Skills in Berkshire

1.0 Summary

The headline data²¹ for the Berkshire LSIP area paints an outwardly positive picture.

- The employment rate (80%) is higher than the national average. Berkshire is ranked 7th of the 38 LSIP areas.
- The sustained positive destination rate after study at Key Stage 4 (16 years) is 96% and is higher than the national average. Berkshire is ranked 4th of the 38 LSIP areas.
- The sustained positive destination rate after study at Key Stage 5 (18 years) is 83% and is higher than the national average. Berkshire is ranked 4th of the 38 LSIP areas.
- The proportion of people qualified at Level 3 or above (66%) is higher than the national average. Berkshire is ranked 6th of the 38 LSIPs.

This analysis has identified that the existing provision is generally successful, performing above national averages in most measures. There is a broad range of provision for Berkshire residents.

The evidence suggests that there is no need to replace the existing structures, instead the Plan seeks to add value, promote partnerships and collaboration to tackle articulated employer skills needs in a systematic and efficient way and refocus to meet priority needs and address specific gaps.

The identified issues or changes required include:

- Expansion of provision in identified priority areas, including apprenticeships (particularly promoted as a route for young people), T Levels (if available) and Adult Education.
- There is an opportunity to increase technical provision for 16–18-year-olds through T levels.
- There is evidence of gaps in provision for some priority sectors such as Screen Industries and Haulage & Logistics. For example, of the identified priority sectors, apprenticeship volumes in 2021/22 were lower in Science (Life Science) and ICT.
- There is evidence of worsening apprenticeship achievement in priority sectors such as Construction and ICT.
- There is a significant lack of provision to service the Screen Industries, a growing need in Berkshire.
- For young people, 4.6% were in a sustained apprenticeship – lower than the 6.4% national average.
- Adult participation in training is lower than national averages.
- The majority of Adult Education and Training is in Preparation for Life & Work or Health (47%) or Public Services & Care (18%), at lower levels. There is a lack of participation in training for other priority sectors.
- This includes relatively few enrolments in higher level qualifications addressing priority sectors such as Science, Construction, ICT, Media.

1.1 Summary- Resident Skills, Local Provision and Outcomes

Half (50%) of residents aged 16-64 in Berkshire were, by 2021, educated to level NVQ4 or above – a figure that had risen from 39% a decade earlier. This is higher than the national average which rose from 33% in 2011 to 44% in 2021.

The proportion of Berkshire's residents aged 16-64 with either no qualifications or NVQ1 or NVQ2 as their highest academic achievement fell from 28.0% to 27.2% between 2017 and 2021. This compares favourably, to the national averages, which moved downwards from 34.6% to 31.4% over the same period.

The sustained positive destination rate in 2019/20 after study at Key Stage 4 in Berkshire (96%), as recorded in 2020/21, was higher than the national average. Berkshire is ranked 4th of the 38 LSIP regions.

²¹ <https://department-for-education.shinyapps.io/local-skills-dashboard/>

By category of sustained destination across Berkshire:

- 92.3% were in sustained education (versus 89.3% across England)
- 1.9% were in sustained employment (2.4%)
- 1.5% were in sustained apprenticeships (2.4%)

Whilst the sustained positive destination rate after study at Key Stage 5 (83.0%) has been declining at a faster rate than the national average in recent years, it remained higher than the national level (79.5%) in 2020/21

Berkshire is ranked 4th of the 38 LSIP regions.

By category of sustained destination across Berkshire:

- 55.9% were in sustained education (versus 51.9% across England)
- 22.5% were in sustained employment (21.1%)
- 4.6% were in sustained apprenticeships (6.4%)

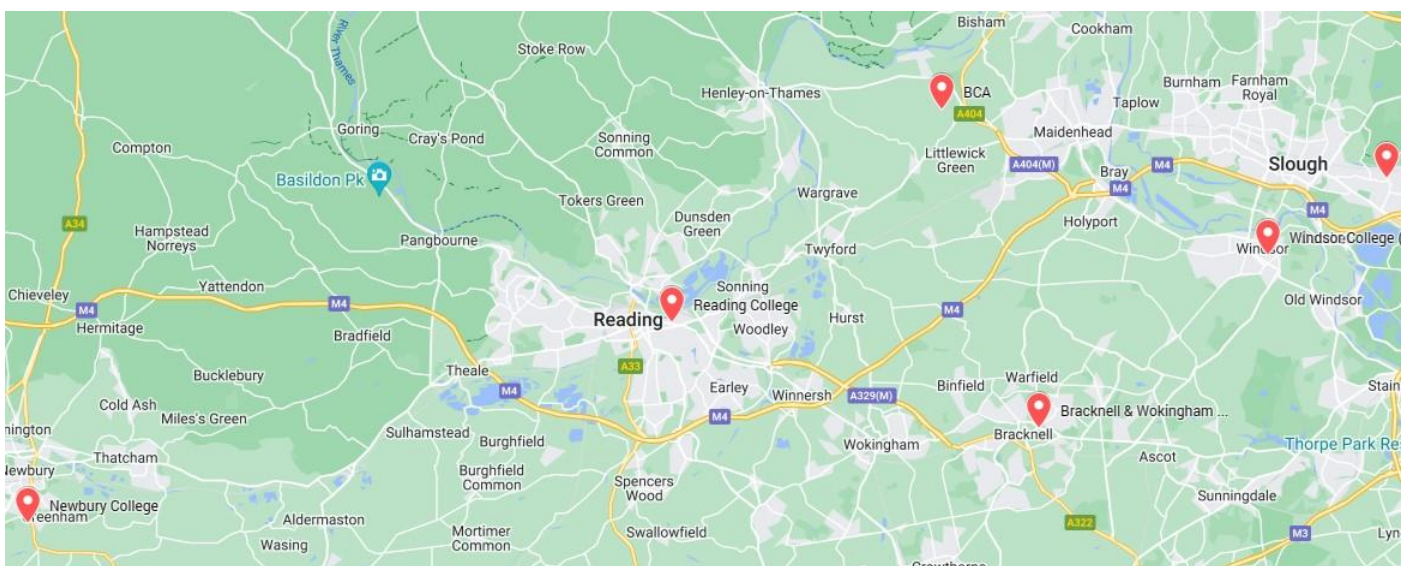
1.2 Provider overview

Across Berkshire there are 85 state maintained educational establishments providing secondary education. These comprise 15 LA Maintained Schools, 51 Academies, 15 Special Schools and 12 Free schools.

Berkshire benefits from a wide range of technical education and skills providers including Activate Learning, The Windsor Forest Colleges Group and Newbury College and University Centre. There is also Reading UTC, Reading University, and a large range of Independent Training Providers.

A full list of providers that have participated in the LSIP are listed in Annex B.

The FE Colleges are centred on the towns of Berkshire serving the six unitary authorities. Recent mergers have consolidated structures, with Activate Learning overseeing Reading College and Bracknell & Wokingham College, and The Windsor Forest Colleges Group overseeing Langley College (in Slough), Windsor College and Berkshire College of Agriculture in Maidenhead. Newbury College and University Centre is sited in Newbury, West Berkshire. Travel to Learn patterns mean there is little further opportunity for elimination of duplication, particularly at lower levels of study. (FE Colleges indicated by red markers in the map below).



1.3 Overall 16-18 Provision and Outcomes

In 2021/22, by enrolment, the largest area of study in Berkshire was A-Levels.

According to the latest published data²², the number of students studying the Level 3 Applied General Qualifications has been rising steadily and, by 2021/22, was more than double the number from 2017/18.

The number studying T Levels is low (as to be expected as the qualifications roll out) and sharply increased in 2021/22.

According to destination data²³ for 16-18-year-olds in Berkshire:

- 55.9% were in a sustained education destination – higher than the 51.9% all-England average.
- 4.6% were in a sustained apprenticeship – lower than the 6.4% average.
- 22.5% were in sustained work – similar to the 21.1% average.
- For 11.4%, there was no sustained destination recorded (versus 15.4%)
- And for 5.7%, the outcome was not known (versus 5.1%)

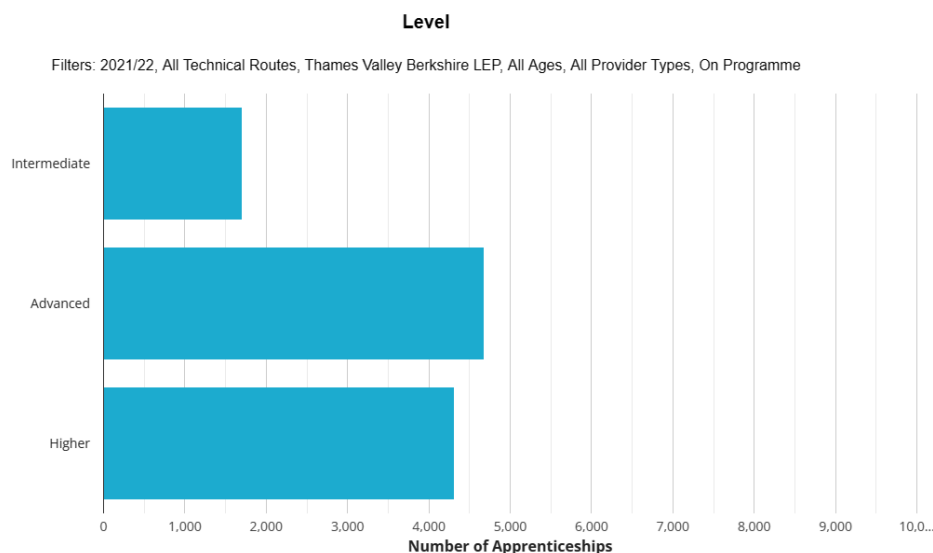
1.4 Further Education Outcomes

1.4.1 Apprenticeships

Providers across Berkshire supported 4,850 Apprenticeship starts across all age groups in 2021/22.²⁴

This was 12% lower than the academic year prior to the pandemic (2018/19).

Of apprentices on programme in 2021/22, most were studying at Advanced or Higher level.²⁵



Data Sources: ILR data (2019/20, 20/21 and 21/22)A ** indicates that a figure has been suppressed due to low numbers (<5)

²² 16-18 study programme delivery via data showing number of leavers by subject area and provider via Education and Training Achievement Rates - By Provider with Provider Type (zip, 2 Mb)

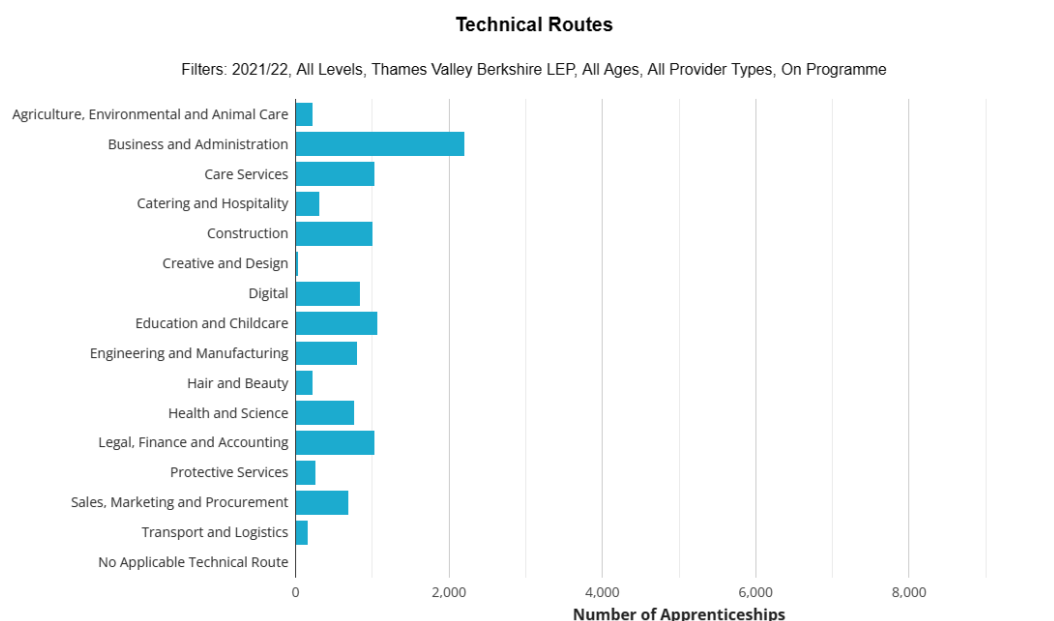
²³ <https://explore-education-statistics.service.gov.uk/find-statistics/16-18-destination-measures>

²⁴ Apprenticeship starts by provider, route, standard, learner residence via Underlying data - apprenticeship starts (zip, 48 Mb)

²⁵ Data from RCU Vector (ILR data)

There was a broad range of apprenticeships across the technical routes, although the largest volumes were in Business and Administration with 2,210 apprentices on programme.

In particular, the volume of apprenticeships in the routes aligned to some priority sectors (Screen Industry and Haulage & Logistics) were relatively small.



Data Sources: ILR data (2019/20, 20/21 and 21/22)A ** indicates that a figure has been suppressed due to low numbers (<5)

1.4.2 Adult Education & Training

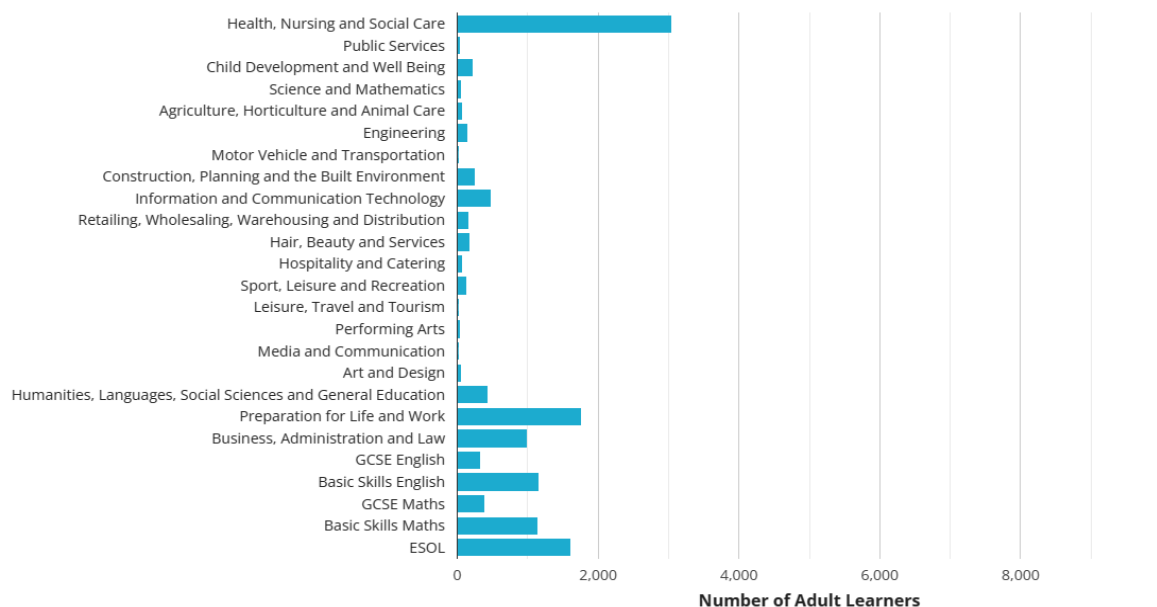
Providers across Berkshire supported 18,541 Adult Education & Training starts in 2021/22.²⁶ ²⁷By the end of the second quarter of 2022/23, there were 12,550 Adult Education starts, the majority of which were in Preparation for Life & Work (basic skills and ESOL) or Health, Nursing and Social Care.

²⁶ 19+ education and training enrolments by provider, route, learning aim title, learner residence etc via Underlying data - FE and skills (FES) aims enrolments (zip, 162 Mb)

²⁷ <https://explore-education-statistics.service.gov.uk/data-catalogue/further-education-and-skills/2022-23>

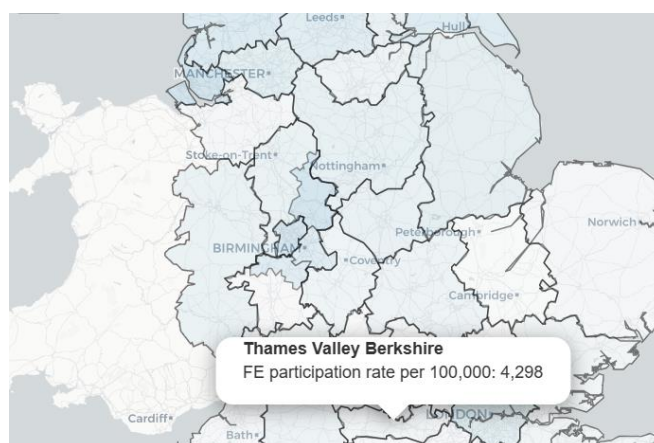
Adults (AEB & Loans)

Filters: 2021/22, All Ages, Berkshire, All Provider Types



Data Sources: ILR data (2019/20, 20/21 and 21/22)A ** indicates that a figure has been suppressed due to low numbers (<5)

The FE participation rate per 100,000 in Berkshire is lower than the national average. It is ranked 28th of the 38 LEPs²⁸.



1.4.3 Higher Levels of Study

In 2020/21, 1,460 learners studied at Levels 4 or 5 in Berkshire²⁹.

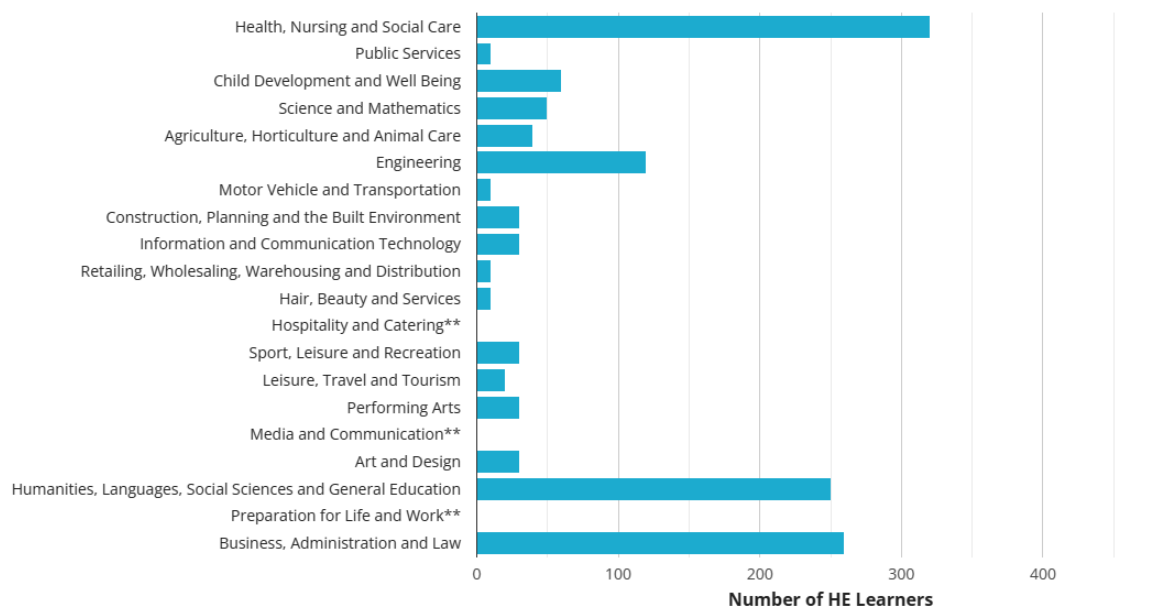
Of these, the largest volumes of enrolments were in Health, Nursing & Care. There were relatively few enrolments in qualifications addressing priority sectors such as Science, Construction, ICT, Media.

²⁸ <https://department-for-education.shinyapps.io/local-skills-dashboard/>

²⁹ RCU Vector data

Subject Areas

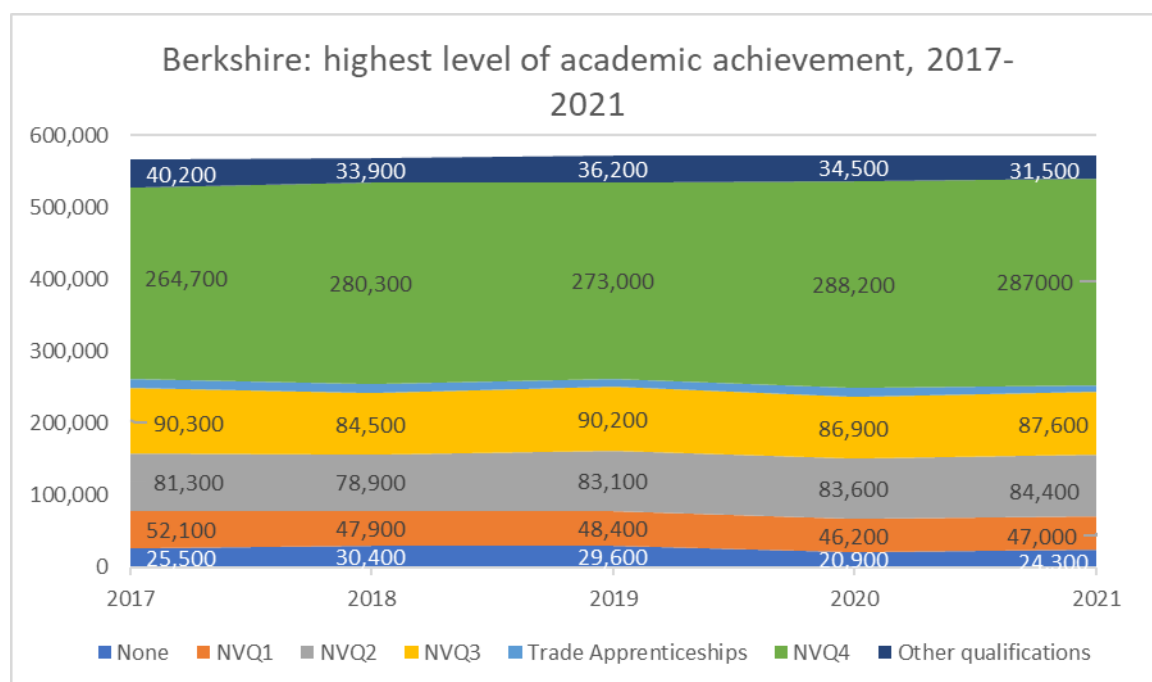
Filters: 2020/21, Thames Valley Berkshire LEP, Level 4 and 5, All Qualification Types, All Modes, All Ages, All Providers



Data Sources: ILR and HESA data (2018/19, 2019/20 and 2020/21 - excluding Apprenticeships)A ** indicates that a figure has been suppressed due to low numbers (<5)

2.0 Resident Skills

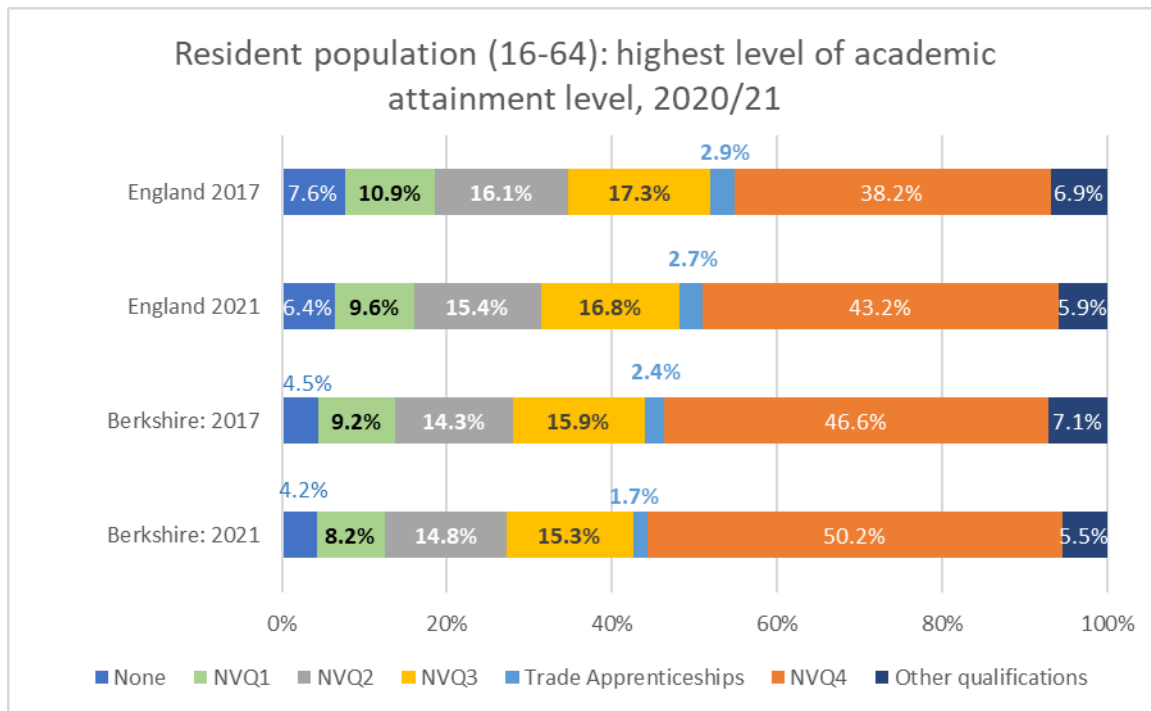
Half (50%) of residents aged 16-64 in Berkshire were, by 2021, educated to level NVQ4 or above – a figure that had risen from 39% a decade earlier. These figures are higher than the national average which rose from 33% in 2011 to 44% in 2021.³⁰



Source: ONS, *Annual Population Survey*

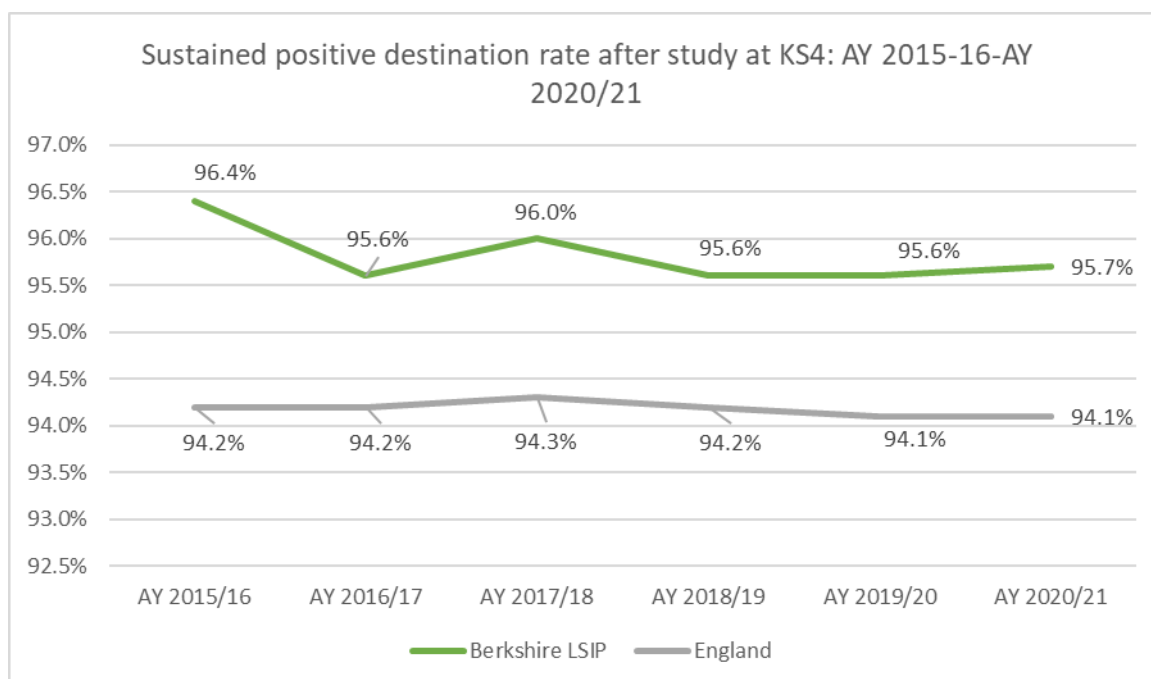
³⁰<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/methodologies/annualpopulationsurveyapsqmi>

The proportion of Berkshire's residents aged 16-64 with either no qualifications or NVQ1 or NVQ2 as their highest academic achievement fell from 28.0% to 27.2% between 2017 and 2021. This still compares favourably, however, to the national averages, which moved downwards from 34.6% to 31.4% over the same period.



Source: ONS, *Annual Population Survey*

The sustained positive destination rate in 2019/20 after study at Key Stage 4 in Berkshire (96%), concluding in 2018/19, was higher than the national average in Academic Year 2020/21. It is ranked 4th of the 38 LSIP regions.³¹



Source: DfE, *KS4 Destination Measures, 2020/21*

³¹ <https://explore-education-statistics.service.gov.uk/find-statistics/key-stage-4-destination-measures>

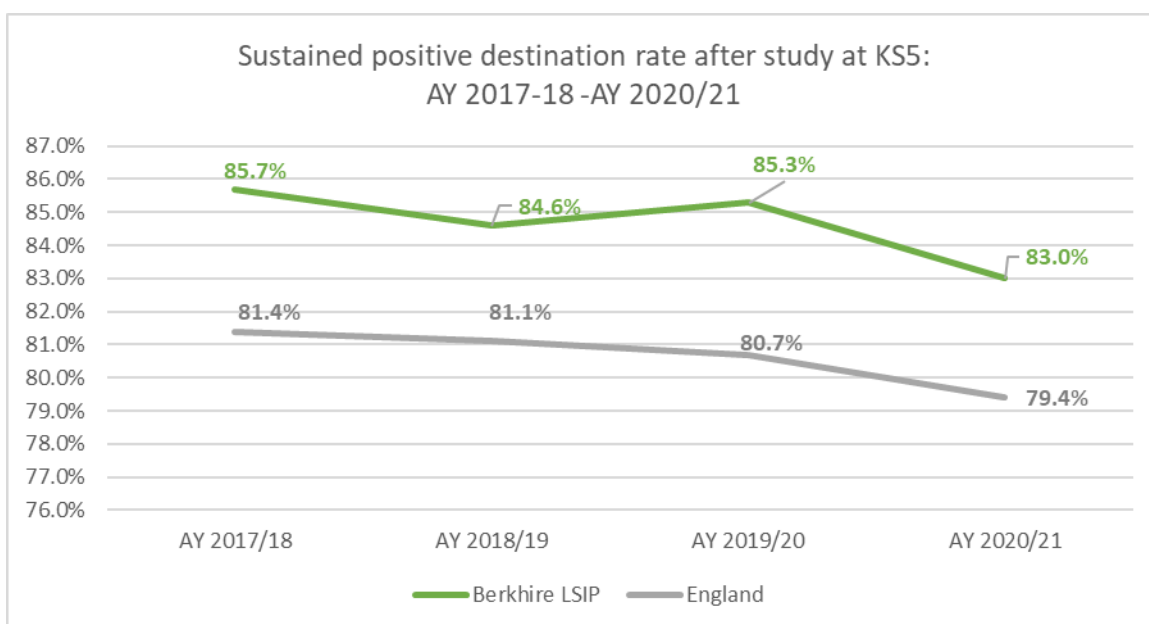
By category of sustained destination across Berkshire:

- 92.3% were in sustained education (versus 89.3% across England)
- 1.9% were in sustained employment (2.4%)
- 1.5% were in sustained apprenticeships (2.4%)

Whilst the sustained positive destination rate after study at Key Stage 5³² in Berkshire (83.0%) has been declining at a faster rate than the national average in recent years, it remained higher than the national level (79.4%) in 2020/21. Berkshire is ranked 4th of the 38 LSIP regions in that year.

By category of sustained destination across Berkshire:

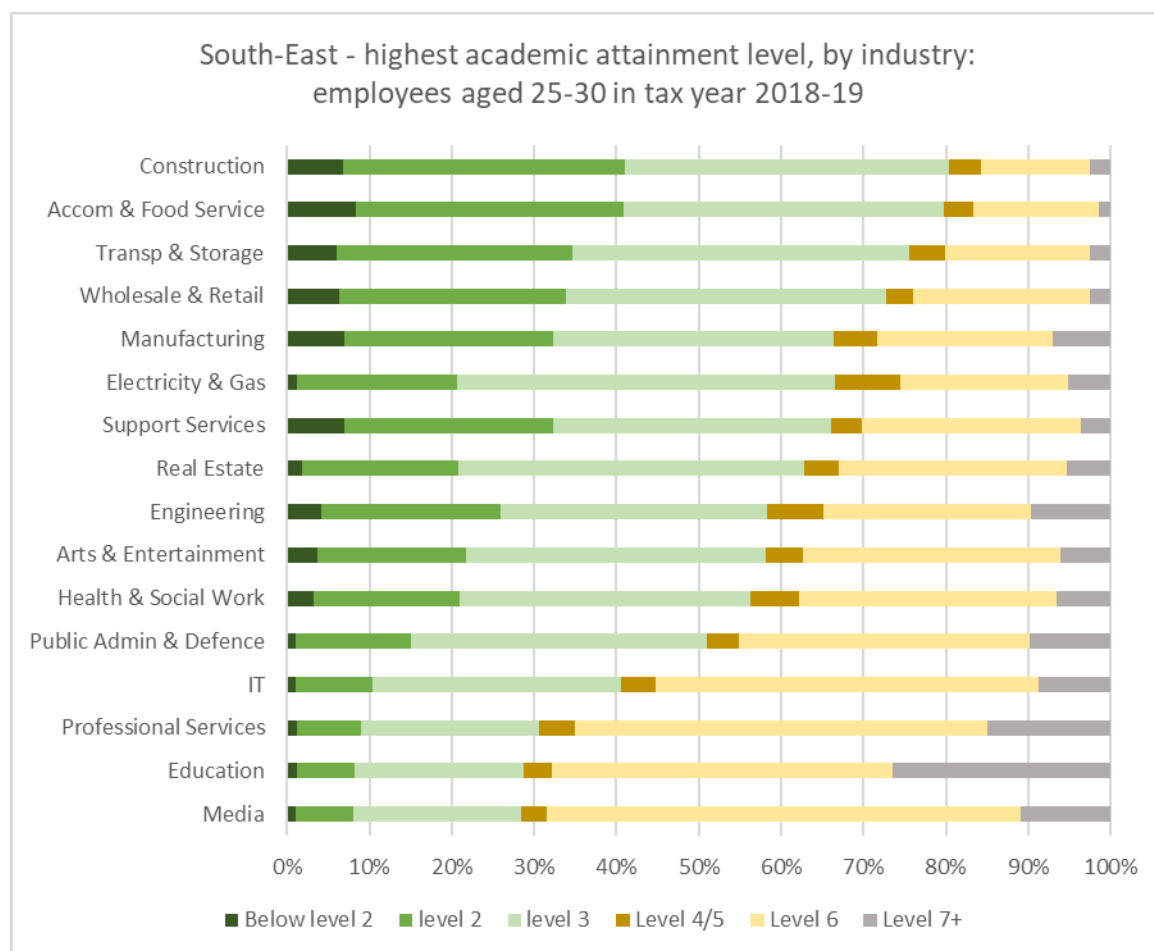
- 55.9% were in sustained education (versus 51.9% across England)
- 22.5% were in sustained employment (21.1%)
- 4.6% were in sustained apprenticeships (6.4%)



Source: DfE, *KS5 Destination Measures, 2020/21*

Whilst no data is available at LSIP level showing the highest academic achievement level, by industry for those in work, data for the South-East serves to provide a useful indication of the extent to which those with either no qualifications or Level 2 or Level 3 achievers are participating in work. This ranges from a combined 80% in the Construction and Accommodation & Food Service sectors to 29% in the Education and Media industries.

³² <https://www.gov.uk/government/statistics/destinations-of-key-stage-4-and-5-students-2021>



Source: DfE Careers Pathways dashboard

3.0 Current Education and Training Provision on Offer

The following sets out the current provision.

3.1 16-18 Year Olds

In 2021/22, by enrolment, the largest area of study for 16-18-year-olds in Berkshire was A-Levels.

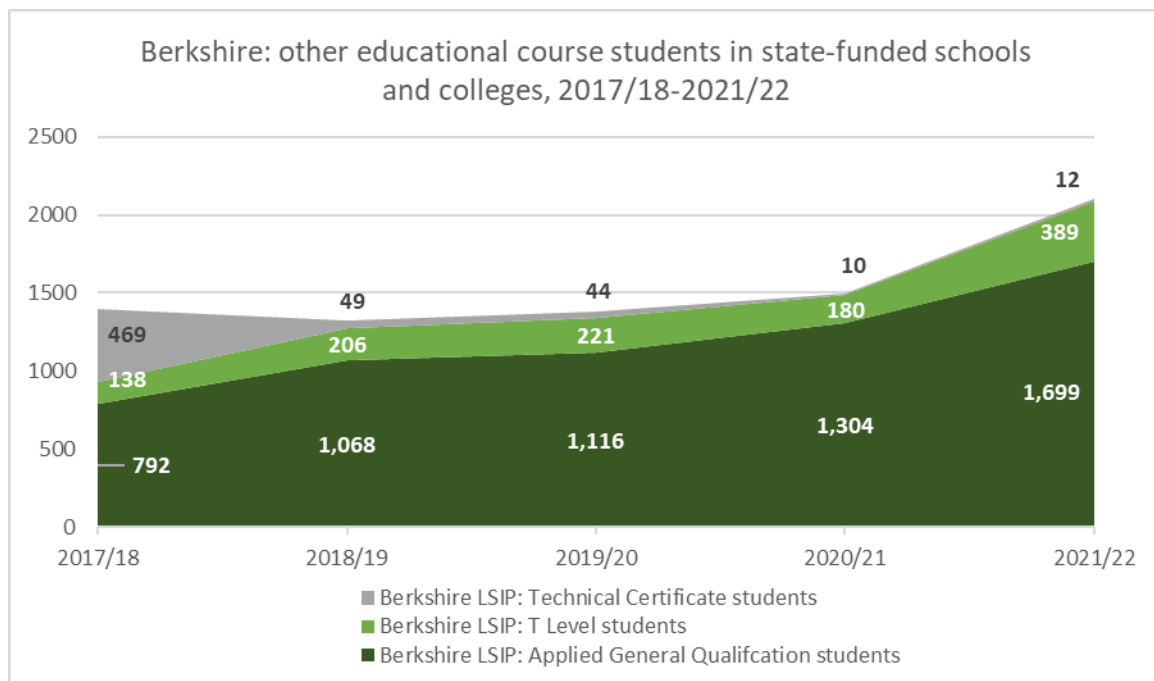
Of the subject areas with equivalency to the identified priority areas (highlighted yellow), most enrolments are with colleges or schools.

Subject Area	GFE	Sixth Form Colleges	School Sixth Forms	Private Training Providers	Other Providers	Total Enrolments
A-Levels	1550	2990	29370	0	0	33,900
Preparation for Life and Work	2750	130	950	250	40	4,120
Science and Mathematics	2220	210	1080	50	5	3,560
Humanities, Languages, Social Sciences and General Education	1720	260	900	40	5	2,920
Business, Administration and Law	420	180	1100	<5	5	1,710
Sport, Leisure, and Recreation	420	100	680	130	0	1,320
Health, Nursing and Social Care	580	70	620	<5	0	1,270
Information and Communication Technology	390	60	570	10	5	1,030
Media and Communication	360	90	150	<5	0	600
Performing Arts	230	60	180	110	0	570
Engineering	410	50	100	0	0	560
Art and Design	350	30	80	10	40	510
Construction, Planning, and the Built Environment	510	0	0	0	0	510
Leisure, Travel and Tourism	150	10	330	0	0	500
Motor Vehicle and Transportation	350	0	0	0	0	350
Hair, Beauty, and Services	330	10	0	10	0	340
Agriculture, Horticulture and Animal Care	330	0	0	10	0	340
Public Services	250	30	50	0	0	330
Hospitality and Catering	120	0	80	10	0	210
Child Development and Well Being	160	10	0	20	0	180
Retailing, Wholesaling, Warehousing and Distribution	5	0	0	30	0	30

According to the latest published data³³, the number of students studying the Level 3 Applied General Qualifications has been rising steadily and, by 2021/22, was more than double the number from 2017/18.

- The number studying Level 3 T Levels has plateaued, before declining in 2020/21. Numbers sharply increased in 2021/22, however.
 - 55.9% were in a sustained education destination – higher than the 51.9% all-England average.
 - 4.6% were in a sustained apprenticeship – lower than the 6.4% average.
 - 22.5% were in sustained work – similar to the 21.1% average.
 - For 11.4%, there was no sustained destination recorded (versus 15.4%)
 - And for 5.7%, the outcome was not known (versus 5.1%)

³³ 16-18 study programme delivery via data showing number of leavers by subject area and provider via Education and Training Achievement Rates - By Provider with Provider Type (zip, 2 Mb)



Source: DfE, *A levels and other 16-18 results 2021/22*³⁴

DfE data³⁵ identified 1,428 Vocational Education Level 3 achievers across Berkshire under the age of 19 from academic year 2020/21, of which:

- 208 were in Bracknell Forest
- 161 were in Reading
- 234 were in Slough
- 268 were in West Berkshire
- 282 were in Windsor & Maidenhead
- 275 were in Wokingham

For 2019/20 achievers, a sustainable outcome³⁶ had been identified for 83.0% by 2020/21. This was above the all-England average of 79.4%.

By outcome:

55.9% were in a sustained education destination – higher than the 51.9% all-England average. Of these:

- 46.0% were in sustained Higher Education
- 7.6% were in sustained Further Education
- 2.3% were in sustained Other Education

4.6% were in a sustained apprenticeship – lower than the 6.4% average. Of these:

- 1.1% were a sustained Apprentice Level 4
- 2.0% were a sustained Apprentice Level 3
- 1.5% were a sustained Apprentice Level 2

22.5% were in sustained work – similar to the 21.1% average.

For 11.4%, there was no sustained destination recorded (versus 15.4%).

And for 5.7%, the outcome was not known (versus 5.1%).

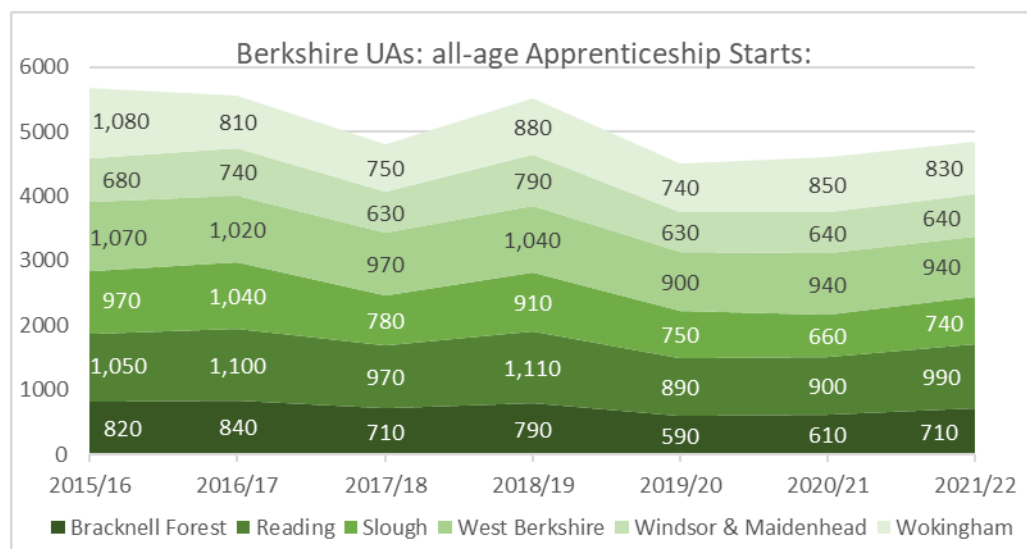
³⁴ <https://www.gov.uk/government/statistics/a-level-and-other-16-to-18-results-2021-provisional>

³⁵ <https://explore-education-statistics.service.gov.uk/find-statistics/level-2-and-3-attainment-by-young-people-aged-19>

³⁶ <https://explore-education-statistics.service.gov.uk/find-statistics/16-18-destination-measures>

3.2 Further Education Outcomes: Apprenticeships

Providers across Berkshire supported 4,850 Apprenticeship starts across all age groups in 2021/22.³⁷ This was 12% lower than the academic year prior to the pandemic (2018/19).



Source: DfE *Apprenticeships & Traineeships*

Amongst Apprentices aged under 19, five key subject areas represented 81% of the 980 identifiable Starts in 2021/22. Of the identified priority sectors, apprenticeship volumes were lower in Media (Screen Sector), Science (Life Science) and ICT.

Berkshire LSIP Summary: subject area Starts: Under 19

Subject Area	2021/22: number of starts:
Health, Public Services & Care	210
Retail & commercial Enterprise	170
Engineering & Manufacturing Technologies	160
Business, Administration & Law	140
Construction, Planning & the Built Environment	110
Information & Communication Technologies	80
Leisure, Travel & Tourism	40
Agriculture, Horticulture & Animal Care	40
Education & Training	20
Arts, Media & Publishing	10
History, Philosophy & Theology	Low
Social Sciences	Low
Science & Mathematics	Low

Source: DfE *Apprenticeships & Traineeships*

Amongst Adult Apprentices (aged 19+), the top two subject areas – Business, Administration & Law and Health, Public Services and Care – represented 64% of the 3,890 identifiable Starts.

³⁷ Apprenticeship starts by provider, route, standard, learner residence via Underlying data - apprenticeship starts (zip, 48 Mb)

Of the identified priority sectors, apprenticeship volumes were lower in Media (Screen Sector), Science (Life Science) and ICT.

Subject areas Start summaries: Adults (19+)

Subject Area	2021/22: number of starts:
Business, Administration & Law	1,400
Health, Public Services & Care	1,080
Information & Communication Technologies	390
Retail & commercial Enterprise	330
Engineering & Manufacturing Technologies	310
Construction, Planning & The Built Environment	150
Education & Training	110
Leisure, Travel & Tourism	40
Agriculture, Horticulture & Animal Care	70
Arts, Media & Publishing	10
History, Philosophy & Theology	Low
Social Sciences	Low
Science & Mathematics	Low

Source: DfE *Apprenticeships & Traineeships*

3.2.1 Under 19 and Adult (19+) Apprenticeships: starts and achievements in Priority Sectors

Arts, Media, and Publishing

ARTS, MEDIA & PUBLISHING UNDER 19		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	Low	Low	Low	Low	Low	Low
	Advanced	10	Low	Low	Low	Low	10
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	10	Low	Low	Low	Low	Low
ACHIEVEMENTS	Intermediate	Low	Low	Low	Low	Low	Low
	Advanced	Low	Low	10	Low	Low	Low
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	Low	Low	10	Low	Low	Low

ARTS, MEDIA & PUBLISHING ADULT: 19+		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	Low	Low	Low	Low	Low	Low
	Advanced	Low	10	10	20	20	10
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	Low	Low	Low	Low	Low	Low
ACHIEVEMENTS	Intermediate	Low	Low	Low	Low	Low	Low
	Advanced	Low	Low	10	10	10	10
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	Low	Low	Low	Low	Low	Low

By the end of the **second quarter of 2022/23**, the following all-aged participation and achievements had been recorded:

LEVEL	All-aged starts	All-aged achievements
Intermediate	Low	Low
Advanced	Low	Low
Higher	Low	Low
VISIBLE TOTAL	Low	Low

Source for all: DfE **Apprenticeships & Traineeships**

Business Administration & Law

BUSINESS, ADMINISTRATION & LAW UNDER 19		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	190	140	100	60	10	20
	Advanced	150	120	100	70	70	80
	Higher	20	30	40	40	40	40
	VISIBLE TOTAL	360	290	240	170	120	140
ACHIEVEMENTS	Intermediate	160	120	80	50	40	10
	Advanced	110	100	70	70	60	30
	Higher	10	10	10	10	20	10
	VISIBLE TOTAL	280	230	160	130	120	50

BUSINESS, ADMINISTRATION & LAW ADULT: 19+		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	570	250	130	100	60	80
	Advanced	490	510	660	430	410	460
	Higher	140	440	810	820	880	860
	VISIBLE TOTAL	1,200	1,200	1,600	1,350	1,350	1,400
ACHIEVEMENTS	Intermediate	320	290	130	50	60	20
	Advanced	210	260	190	210	270	190
	Higher	50	60	70	150	350	360
	VISIBLE TOTAL	580	610	390	410	680	570

By the end of the **second quarter of 2022/23**, the following all-aged participation and achievements had been recorded:

LEVEL	All-aged starts	All-aged achievements
Intermediate	50	40
Advanced	280	130
Higher	560	170
VISIBLE TOTAL	890	340

Source for all: DfE *Apprenticeships & Traineeships*

Construction, Planning & the Built Environment

CONSTRUCTION, PLANNING & THE BUILT ENVIRONMENT UNDER 19		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	70	60	50	40	50	60
	Advanced	10	20	30	30	20	40
	Higher	Low	10	10	10	10	10
	VISIBLE TOTAL	80	90	90	80	80	110
ACHIEVEMENTS	Intermediate	40	40	30	30	20	20
	Advanced	Low	20	10	10	10	10
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	40	60	40	40	30	30

CONSTRUCTION, PLANNING & THE BUILT ENVIRONMENT ADULT: 19+		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	50	40	50	60	50	50
	Advanced	20	20	30	50	40	60
	Higher	Low	10	30	40	40	40
	VISIBLE TOTAL	70	70	110	150	130	150
ACHIEVEMENTS	Intermediate	50	20	20	20	30	20
	Advanced	10	20	10	10	20	10
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	60	40	30	30	50	30

By the end of the **second quarter of 2022/23**, the following all-aged participation and achievements had been recorded:

LEVEL	All-aged starts	All-aged achievements
Intermediate	70	30
Advanced	80	10
Higher	70	Low
VISIBLE TOTAL	220	40

Source for all: DfE *Apprenticeships & Traineeships*

Health, Public Services & Care

HEALTH, PUBLIC SERVICES & CARE UNDER 19		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	170	140	180	130	150	110
	Advanced	90	80	90	80	110	90
	Higher	Low	Low	Low	10	Low	10
	VISIBLE TOTAL	260	220	270	220	260	210
ACHIEVEMENTS	Intermediate	100	90	70	80	70	40
	Advanced	50	50	50	50	30	50
	Higher	Low	Low	Low	Low	Low	Low
	VISIBLE TOTAL	150	140	120	130	100	90

HEALTH, PUBLIC SERVICES & CARE ADULT: 19+		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	420	290	220	200	230	190
	Advanced	650	520	520	410	550	470
	Higher	170	130	270	260	400	420
	VISIBLE TOTAL	1,240	940	1,010	870	1,180	1,080
ACHIEVEMENTS	Intermediate	240	260	110	90	100	80
	Advanced	220	330	270	210	200	190
	Higher	40	50	80	70	140	100
	VISIBLE TOTAL	500	640	460	370	440	370

By the end of the **second quarter of 2022/23**, the following all-aged participation and achievements had been recorded:

LEVEL	All-aged starts	All-aged achievements
Intermediate	140	70
Advanced	300	100
Higher	210	80
VISIBLE TOTAL	650	250

Source for all: DfE *Apprenticeships & Traineeships*

Information & Communication Technology

INFORMATION & COMMUNICATION TECHNOLOGY UNDER 19		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	10	10	Low	Low	Low	Low
	Advanced	130	80	60	50	30	50
	Higher	40	30	30	30	30	30
	VISIBLE TOTAL	180	120	90	80	60	80
ACHIEVEMENTS	Intermediate	Low	Low	Low	Low	Low	Low
	Advanced	120	90	50	40	40	20
	Higher	10	10	10	10	20	20
	VISIBLE TOTAL	130	100	60	50	60	40

INFORMATION & COMMUNICATION TECHNOLOGY ADULT: 19+		2016/ 2017	2017/ 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022
STARTS	Intermediate	20	30	90	40	Low	Low
	Advanced	100	100	150	90	130	180
	Higher	70	90	110	200	250	210
	VISIBLE TOTAL	190	220	350	330	380	390
ACHIEVEMENTS	Intermediate	Low	20	20	70	40	Low
	Advanced	90	50	60	80	60	60
	Higher	30	30	20	40	70	100
	VISIBLE TOTAL	120	100	100	190	170	160

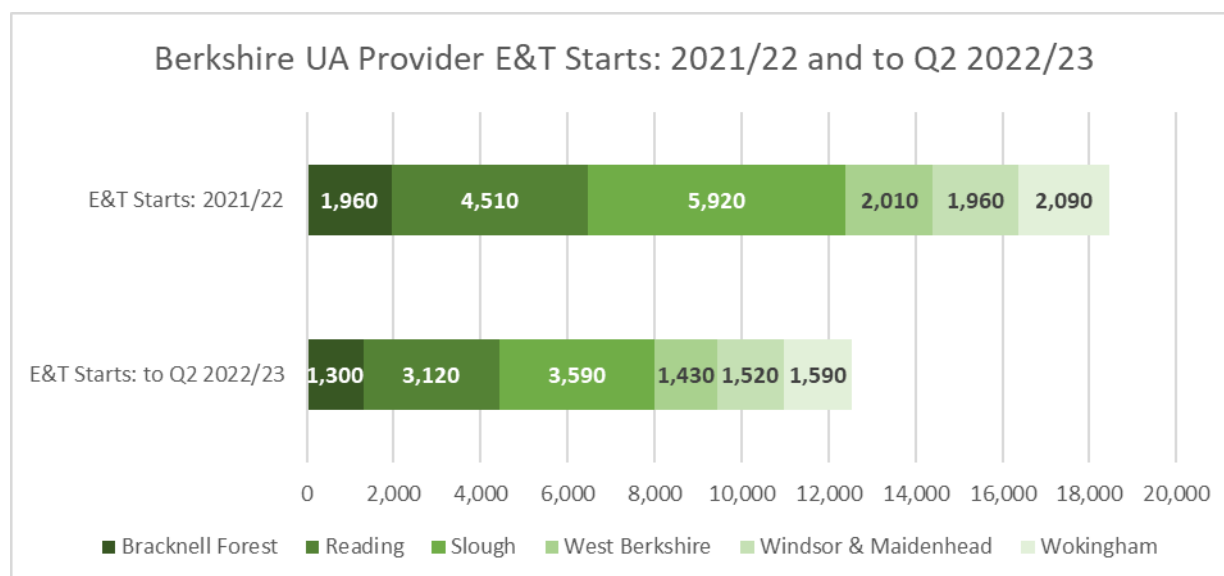
By the end of the **second quarter of 2022/23**, the following all-aged participation and achievements had been recorded:

LEVEL	All-aged starts	All-aged achievements
Intermediate	Low	Low
Advanced	110	40
Higher	160	40
VISIBLE TOTAL	270	80

Source for all: DfE *Apprenticeships & Traineeships*

3.3 Further Education Outcomes: Adult Education & Training

Providers across Berkshire supported 18,450 Adult Education & Training (E&T) starts in 2021/22.



Source: DfE, *Further Education & Skills*

By the end of Q2 2022/23, Providers across Berkshire had supported 12,000 Adult Education starts, the majority of which were in Preparation for Life & Work or Health (50%) or Health, Public Services & Care (19%).

Berkshire LSIP Summary: Adult Education & Training subject area Starts, 2022/23

Subject Area	2022/23: number of Adult E&T starts
Preparation for Life & Work	5,950
Health, Public Services & Care	2,230
Business, Administration & Law	820
Information & Communication Technologies	600
Science & Mathematics	590
Languages, Literature & Culture	580
Retail & commercial Enterprise	270
Construction, Planning & the Built Environment	220
Engineering & Manufacturing Technologies	200
Arts, Media & Publishing	200
Education & Training	180
Leisure, Travel & Tourism	90
Agriculture, Horticulture & Animal Care	40
Social Sciences	30
History, Philosophy & Theology	Low

Source: DfE, *Further Education & Skills*

3.3.1 Adult Education: starts and achievements in Priority Sectors

Arts, Media, and Publishing

ARTS, MEDIA & PUBLISHING ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	70	50
	Level 1	60	Low
	Level 2	120	30
	Level 3	110	110
	Level 4+	Low	Low
ACHIEVEMENTS	Entry	70	Low
	Level 1	50	Low
	Level 2	100	10
	Level 3	70	Low
	Level 4+	Low	Low

Business, Administration & Law

BUSINESS, ADMINISTRATION & LAW ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	20	Low
	Level 1	270	110
	Level 2	810	460
	Level 3	240	190
	Level 4+	50	50
ACHIEVEMENTS	Entry	20	Low
	Level 1	260	60
	Level 2	570	190
	Level 3	110	Low
	Level 4+	Low	Low

Construction, Planning & the Built Environment

CONSTRUCTION, PLANNING & THE BUILT ENVIRONMENT ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	Low	Low
	Level 1	170	140
	Level 2	130	60
	Level 3	20	20
	Level 4+	Low	Low
ACHIEVEMENTS	Entry	Low	Low
	Level 1	130	30
	Level 2	90	Low
	Level 3	10	Low
	Level 4+	Low	Low

Health, Public Services & Care

HEALTH, PUBLIC SERVICE & CARE ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	10	20
	Level 1	110	50
	Level 2	3,000	1,750
	Level 3	450	350
	Level 4+	60	70
ACHIEVEMENTS	Entry	10	20
	Level 1	90	20
	Level 2	2,180	660
	Level 3	250	30
	Level 4+	Low	Low

Information & Communication Technology

INFORMATION & COMMUNICATION TECHNOLOGY ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	270	340
	Level 1	50	60
	Level 2	210	130
	Level 3	140	80
	Level 4+	Low	Low
ACHIEVEMENTS	Entry	210	140
	Level 1	40	Low
	Level 2	120	60
	Level 3	60	Low
	Level 4+	Low	Low

Preparation for Life & Work

PREPARATION FOR LIFE & WORK ADULT EDUCATION & TRAINING		2021/ 2022	To Q2 2022/ 2023
ENROLMENTS	Entry	5,350	3,700
	Level 1	2,370	1,380
	Level 2	1,130	720
	Level 3	Low	Low
	Level 4+	Low	Low
ACHIEVEMENTS	Entry	4,520	440
	Level 1	1,780	260
	Level 2	680	80
	Level 3	Low	Low
	Level 4+	Low	Low

Section D Deep Dive on Priority Sectors

Priority Sector: Screen Industries

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

Despite significant increases in the number of enterprises and jobs in the past five years to meet growing demand, employers have reported skills shortages in several roles. There has been a substantial increase in the number of jobs in 'Motion Picture, Video and TV Programme Production Activities'. Most of the identified hard to recruit roles by employers are supported by the Secondary Data.

There has been major investment in the UK's film and high-end TV (HETV) production³⁸ in the past few years with a record £5.37 billion spend in 2022. These all-time high levels of production spend strengthens the UK's status as leading global destination for film and HETV production which could support between 6,000-13,000 new jobs. The UK's screen industries hub includes locations, west and northwest of London and the M4 corridor in Berkshire has been central in providing new and expansion sites to enable this investment. This includes new facilities established and expanding at Shinfield Studios (nr Reading); Stage Fifty (Winnersh Triangle) and significant expansion at Bray Studios (Maidenhead). Importantly, there remains an ongoing demand, and appetite by foreign direct investors, which can be seen with recent planning applications (at Holyport) and further discussion on more sites and more film studios being attracted to the County in the next couple of years. This means there is a, conservative, estimated increase in the number of jobs across Berkshire by 4,600 by 2024³⁹ and significant new and replacement demand for the foreseeable future.

1.0 Businesses

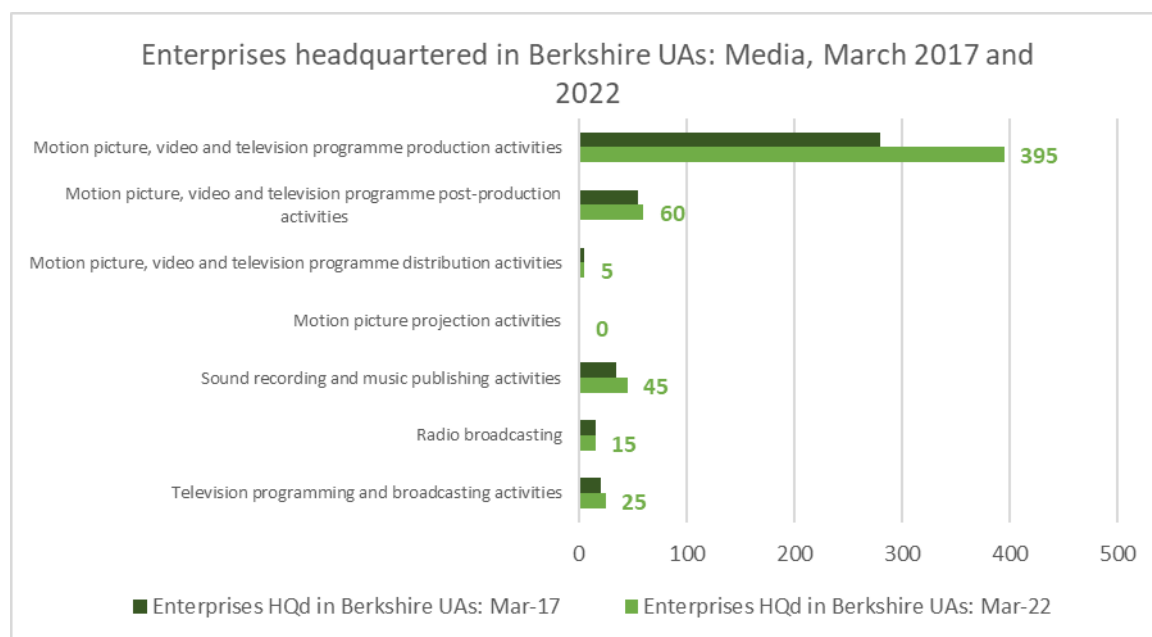
In early 2022⁴⁰, there were 545 businesses involved in the Media industry in Berkshire. This was an increase of 33% compared to the Business Register in 2017. The vast majority were micro businesses, with 15 small enterprises and 5 medium-sized.

The biggest enterprise growth since 2017 has been in the number of companies involved in Motion Picture, Video and TV Programme Production Activities which have increased by 41%.

³⁸ UK INWARD INVESTMENT FILM AND HIGH-END TV PRODUCTION SPEND REACHES RECORD FIGURE OF £5.37 BILLION IN 2022 – British Film Commission

³⁹ Maximising the potential of the Screen Sector in the Greater Reading Area February 2023 REDA

⁴⁰ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>



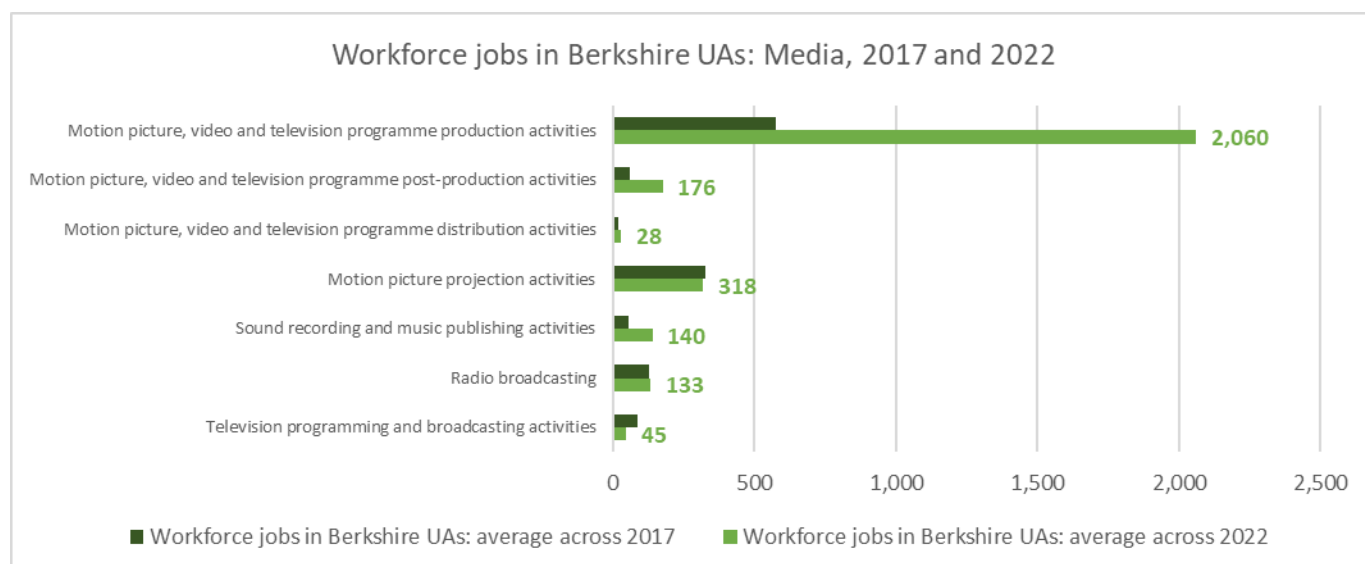
Source: ONS, **UK Business Counts**

2.0 Jobs- Analysis of Changes from 2017-2022

The total number of jobs in the Motion Picture and broadcasting sectors in Berkshire in 2022 was 2,900. This compares to 1,200 in 2017 and is an increase of 1,700 (133%).

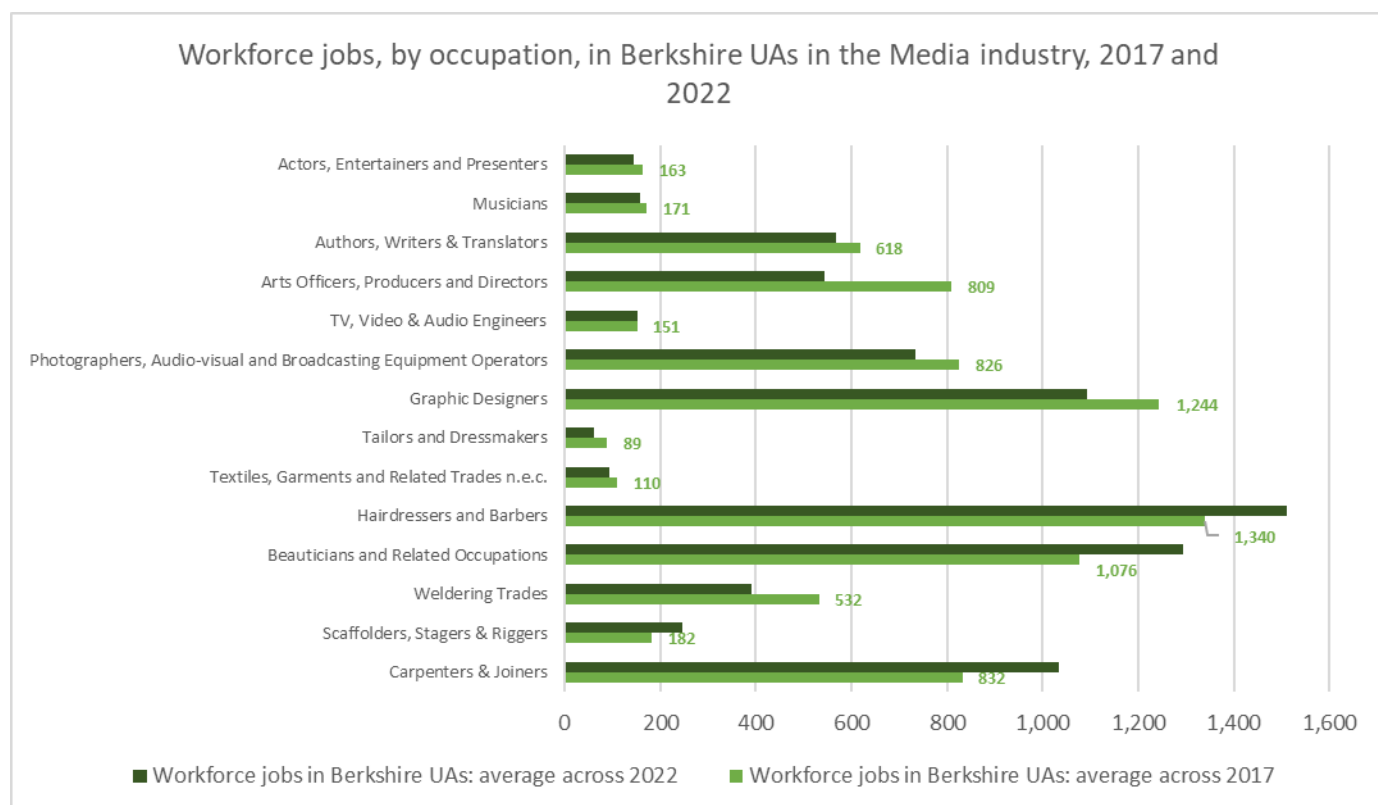
Significant growth in the volume of jobs has been seen in 'Motion Picture, Video and TV Programme Production Activities' and 'Motion Picture, Video and Television Programme Post-Production' (Table 1).

Table 1



Source: Lightcast

More granular analysis (Table 2) shows there has been a 49% increase in the number of Arts Officers, Producers and Directors jobs and a 13% increase in the number of Photographers, Audio-Visual and Broadcasting Equipment Operators jobs.

Table 2

Source: Lightcast

3.0 Jobs- Forecast Demand

The most up to date and relevant forecast future demand for jobs in the screen industries is detailed in the research conducted by Reading's Economy and Destination Agency (REDA) published in February 2023⁴¹.

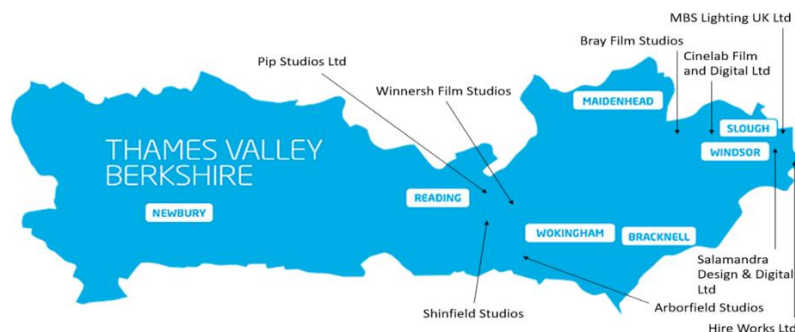
REDA's research outlines the private-sector infrastructure investment in the UK in the last two years of more than £3.7bn which could support between 6,000-13,000 new jobs. The Greater Reading Area in Berkshire is seeking *"to capture that energy and create opportunities for growth with an epicentre at Shinfield Studios, Cine Valley, and radiating out across the Berkshire and Thames Valley area to become a global centre for film and TV production in the UK."*

The REDA research further states that, *"1.2 million new workers will be needed in the sector over the next decade."*

It also details the huge expansion and growth plans: *"In the next year, the Greater Reading area will see stage area increase from 235,850 sq. m to 1,247,020 sq. m and the number of stages from 12 to 30. For context, Hertfordshire's capacity is 1,078,957 sq.m while Buckinghamshire is 836,919 sq.m. There is major expansion at Shinfield, and Stage 50 at Winnersh, as well as Arborfield Studios and the historic Bray Studios, to meet demand for production space. The screen industry sector in Berkshire is growing at record rates and the area is becoming a global hub for film and TV production."*

The locations for these expansions are shown on the map below. These are estimated to increase the number of jobs in the Greater Reading area alone by 4,600 by 2024 as shown below.

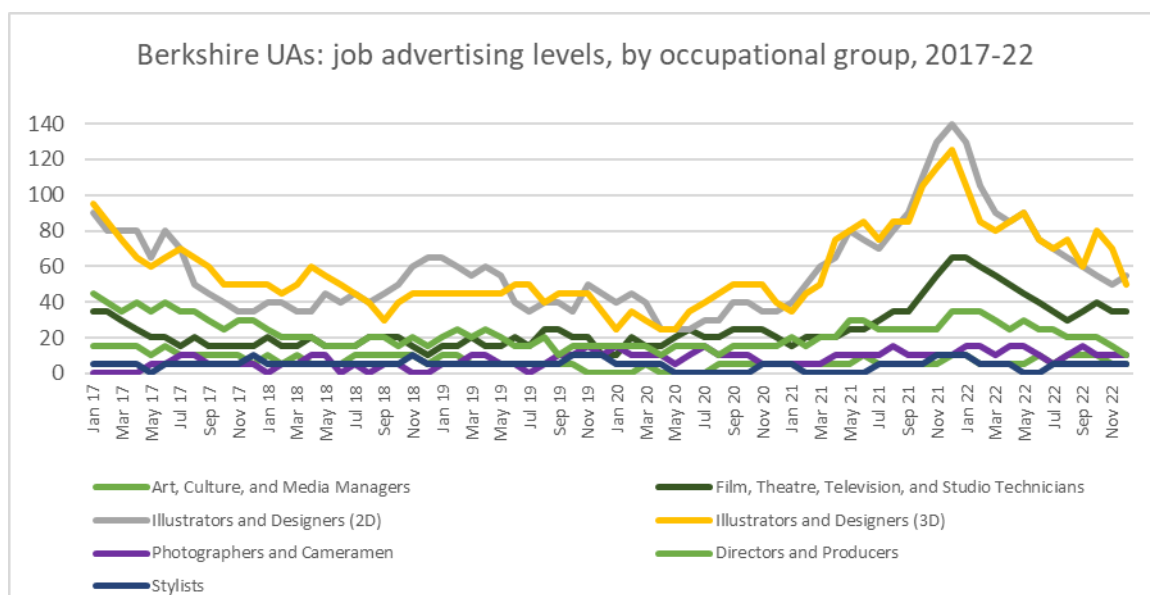
⁴¹ Maximising the Potential of the Screen Sector in the Greater Reading Area, Reading's Economy and Destination Agency (REDA), February 2023.



Facility	Projected jobs by 2024	Revenue and job information
Shinfield Studios	3,000	Stage 1 is open with the entire site to be opened in phases by 2024. Total inward investment of c.£600m per annum
Winnersh Film Studios	1,000	The entire site is scheduled to be completed by the end of 2022. Will add £50m to the economy annually
Arborfield Studios	600	Site completed. Will employ 200-600 people at peak times
Greater Reading Area	4,600	

3.1 Job Vacancies

Job vacancy levels, by core occupational group, increased through 2021 and decreased during 2022. They remain higher for Film, Theatre, TV & Studio Technicians and Illustrators and Designers.



Source: Textkernel

3.2 Further Factors to Consider

The REDA research, published in February 2023, also reported the following threats to the Creative sector:

- 42% of creative industry employers in the UK report a skills gap issue.
- 73% of creative businesses with more than 100 staff struggle to find people with the right skills.
- 87% of highly creative workers are at a low to no risk of automation (source: Nesta)

It further reported that 50% of Creative sector employers have arranged or funded training for staff over the past 12 months, less than 30% invested in training for freelancers, larger organisations are more likely to invest in training than smaller ones and there is difficulty attracting recruits from under-represented groups and retaining older workers.

The research noted that the preferred types of training to meet employers' future skills needs included technical/vocational training for those new to the workforce and apprenticeships across all ages.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Job Vacancy Data)
Camera Operatives	5224/02 Camera and photographic equipment technicians 3417/01 Camera operators and videographer; 3417 Photographers, audio-visual and broadcasting equipment operators
AV Technicians	3417 Photographers, audio-visual and broadcasting equipment operators 5249/01 Broadcast and communications technicians
Cinematographers	3417 Photographers, audio-visual and broadcasting equipment operators
Editors	3417 Photographers, audio-visual and broadcasting equipment operators 3417 Arts officers, producers, and director
Animators	3421 Graphic and multimedia designers
Production Co-Ordinators and Runners	3416 Arts officers, producers, and director
Production Managers	1255/02 Film and television production managers
Grip	3113 Engineering technician
Costumes	5414 Cad, drawing and architectural technicians 5413/01 Costume makers 3422/02 Clothing and fashion designers 5413/03 Fitters and alterations assistants
Make-Up	5449 Other skilled trades n.e.c. 6221/02 Hairdressers 3429/03 Performance make-up artists 5449/04 Hairpiece and wig makers
Props	5449 Engineering technicians 5449/99 Other skilled trades n.e.c. 9269/03 Stagehands
Carpenter	5315 Carpenters and joiners
Electricians	5241 Electricians and electrical fitter
Accountants-Production and Payroll	4122 Bookkeepers, payroll managers and wages clerks

Priority Sector: Construction and Built Environment

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

Employers have reported growing demand and skills shortages. Despite this, the number of people in Berkshire engaged in skilled trades jobs has declined.

Forecast growth and replacement demand will add pressure to an employment market that is already tight.

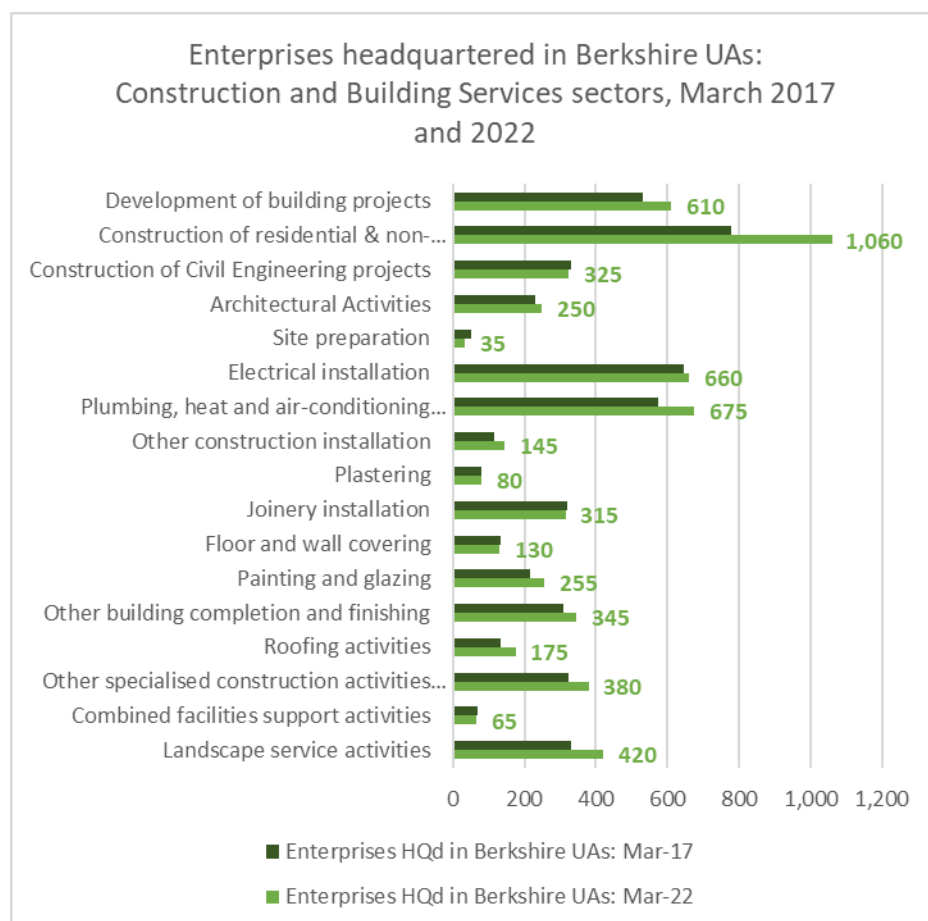
In addition, changing technologies (often driven by the sustainability agenda) will drive further requirements for training and upskilling.

1.0 Businesses

In early 2022⁴², there were 5,945 businesses involved in 'Construction, Architecture and Building Services' in Berkshire. This was an increase of 15% compared to the Business Register in 2017. The vast majority were micro businesses, with only 250 small enterprises and 30 medium-sized.

The biggest enterprise growth since 2017 has been in the number of companies involved in the construction of residential and non-residential buildings.

⁴² <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>
<https://www.ons.gov.uk/businessindustryandtrade/business>

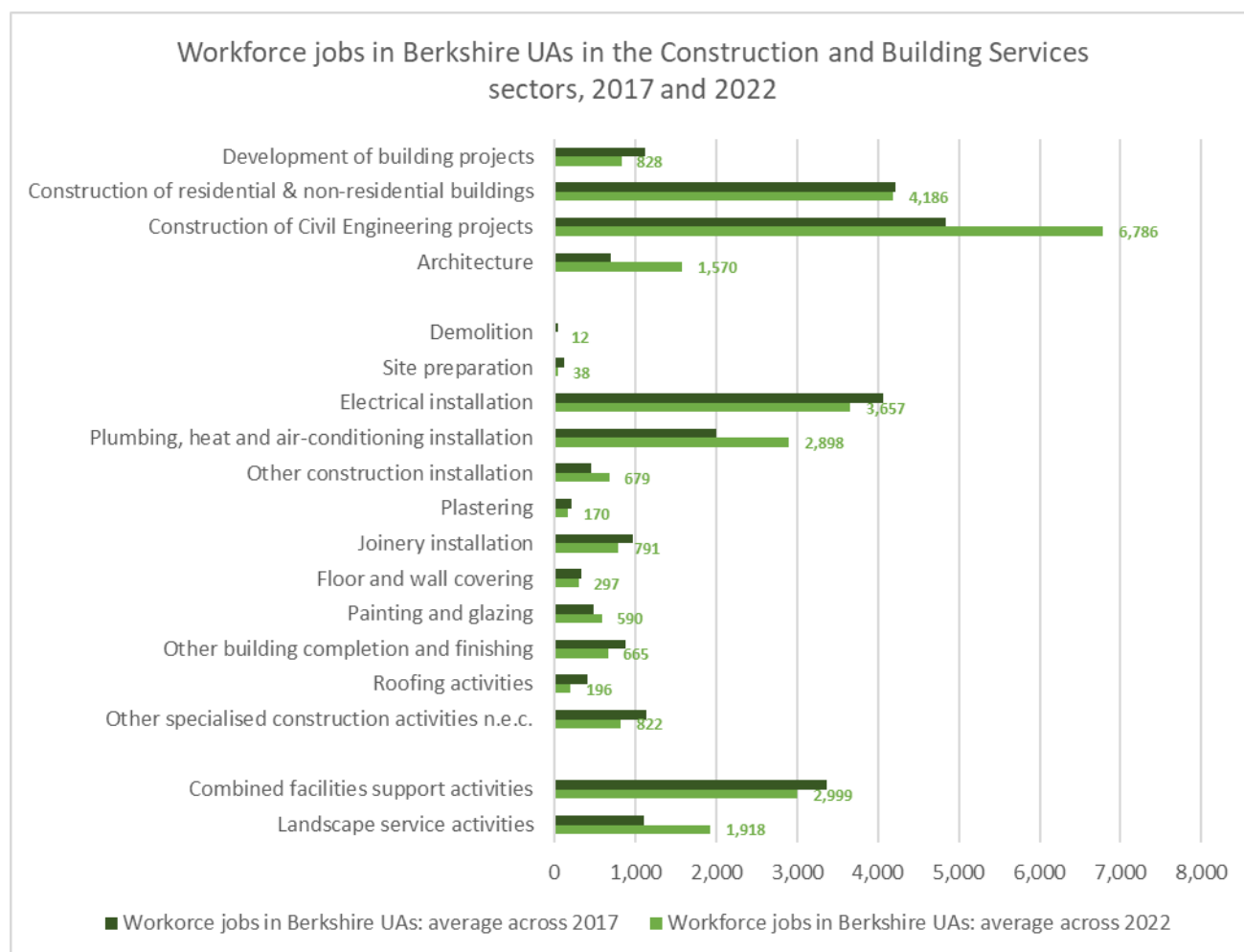


Source: ONS, **UK Business Counts**

2.0 Jobs- Analysis of Changes from 2017-2022

The total number of jobs in this sector in Berkshire in 2022 was 29,100. This compares to 26,400 in 2017 – an increase of 2,700 (9%).

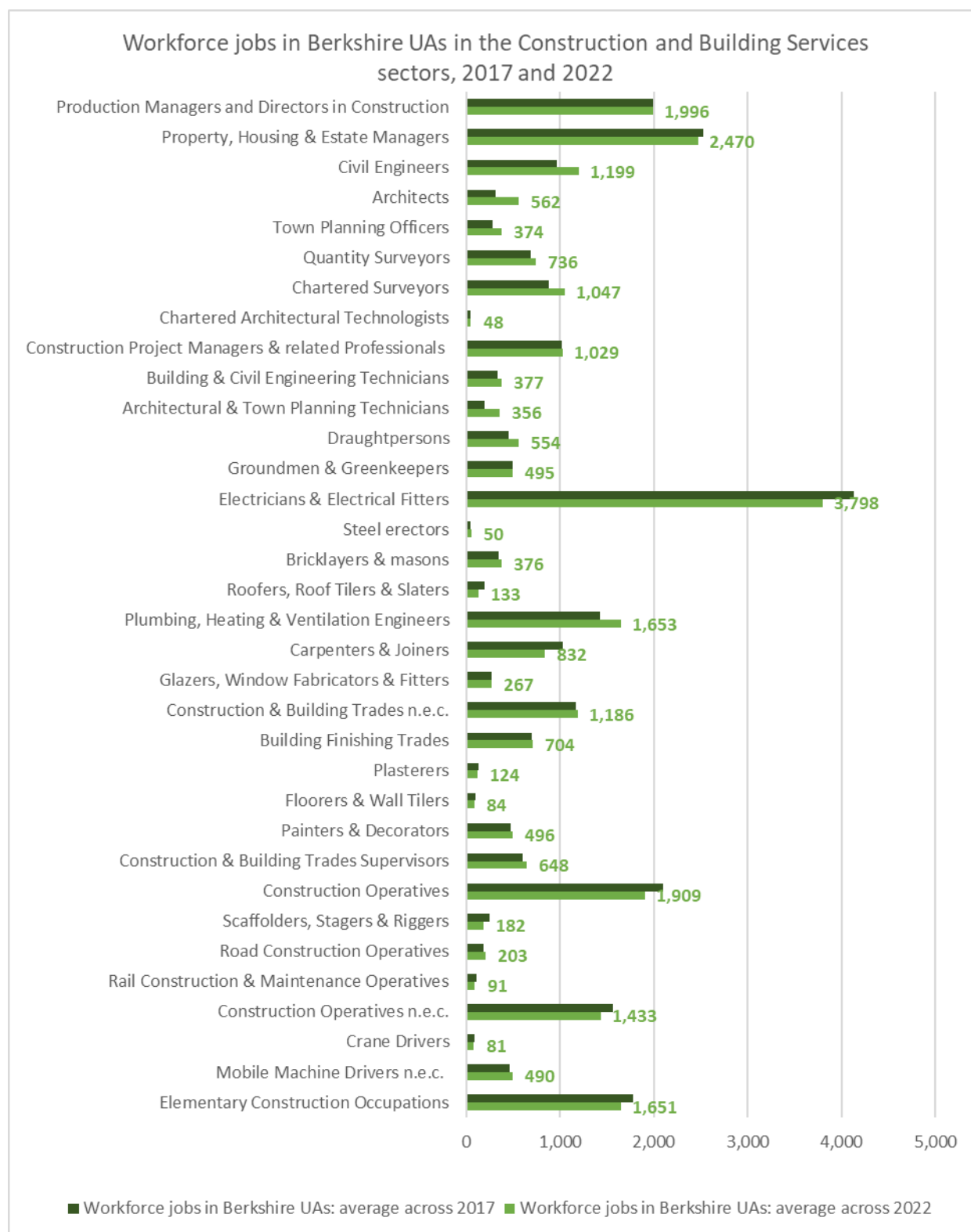
Significant growth in the volume of jobs has been seen in ‘Construction of Civil Engineering Projects’ and ‘Plumbing, Heat and Air-Conditioning Installation’ (Table 1).

Table 1

Source: Lightcast

More granular analysis (Table 2) shows there has been an 8% decline in the number of people fulfilling Electricians & Electrical Fitter jobs. Research by the Electrical Contractors' Association (ECA) – the UK's leading trade association for the electrotechnical and engineering services industry – confirms that, the electrician population within the area is 'very low', with Berkshire ranking 35th out of 38 LSIP areas.

There has also been a 19% decline in the number of Carpenters & Joiner jobs, a 9% fall in the number of Construction Operative jobs and a 7% decline in the number of jobs in Elementary Construction Occupations. In addition, there were just 376 Bricklayer/Mason, 133 Roofer/Tiler, 124 Plaster and 84 Floorer & Wall Tiler jobs across Berkshire in 2022.

Table 2

Source: Lightcast

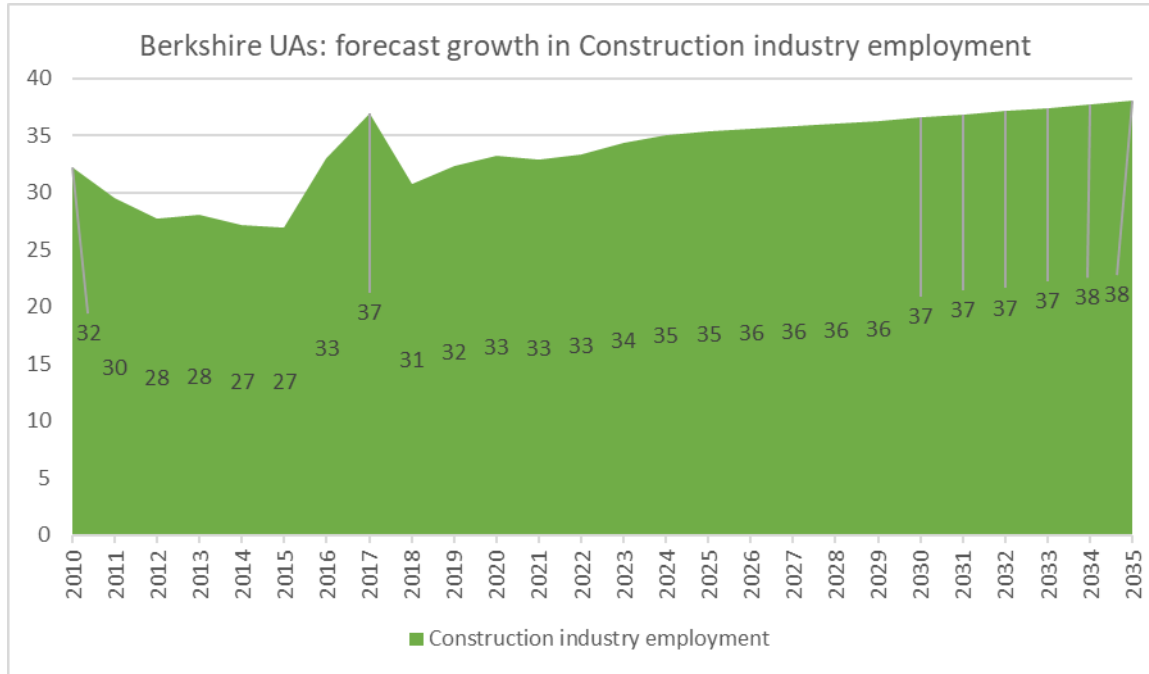
3.0 Jobs- Forecast Demand

Demand within the Construction industry across Berkshire is forecast to continue steadily increasing in size and will require an additional 4,300 workers by 2035⁴³. The Skills Imperative 2035 estimates an average of

⁴³ <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>

1.5% annual growth over the period 2023-27, compared to the CITB's estimate of 0.1% annual growth in the national Construction workforce over the same period.⁴⁴

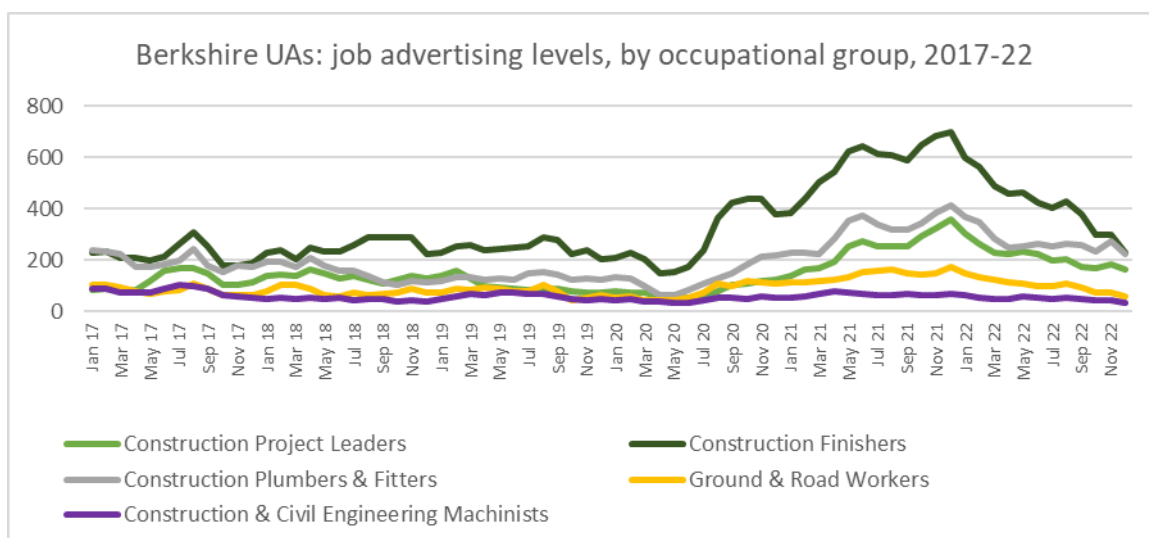
There is also a significant forecast replacement demand, requiring 14,900 replacement workers over the period 2020-35. This is a combined forecast 19,200 workers who will need to be trained and/or upskilled over the period.



Source: **Skills Imperative 2035**

3.1 Job Vacancies

Job vacancy levels, by core occupational group, increased through 2021 and early 2022, and remain higher than pre-pandemic levels.



Source: Textkernel

⁴⁴ CITB Construction Skills Network: Five Year Outlook, 2023-27

3.2 Further Factors to Consider

The pipeline of development work in the area remains strong and the following projects will likely contribute to ongoing high demand:

- Slough urban Renewal
- Station Hill Development, Reading
- Green Park Village (and train station), near Reading
- Friar Street (town centre) Regeneration, Reading
- Maidenhead town centre regeneration, including 400+ new homes.
- £19.1 government 'Levelling Up' funding to revitalise Reading's Hexagon theatre and create a new library.
- £9.2m government 'Levelling Up' funding to redevelop Farnham Road in Slough

In addition, the Construction and Built Environment Industry requires significant upskilling to respond to changing technologies and green skills. For example, the ECA⁴⁵ report that fully qualified and competent electricians, and the electrical contracting businesses which employ them, are crucial to delivery of infrastructure, housing, and smart technologies. As demonstrated by ECA's own Leading the Charge campaign, electricians are also central to 'net zero', possessing the key skillsets for solar PV, energy storage systems, EV charging, etc.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Jobs Vacancy Data)
Bricklayers	5321 Bricklayers
Cladding	8149 Construction operatives n.e.c.
Plasterers and Dry Liners	5321 Plasterers
Scaffolders	8141 Scaffolders, staggers, and riggers
Plumbers	5314 Plumbers & heating and ventilating installers and repairers
Air Conditioning/Refrigeration	5225 Air-conditioning and refrigeration installers and repairers
Smart Home Technician	5314 Plumbers & heating and ventilating installers and repairers
Electricians	5241 Electricians and electrical fitters
Business Administration	4159 Other administrative occupations n.e.c.

⁴⁵ ECA final submission of evidence and LSIP recommendations on behalf of electrotechnical employers – Berkshire

Priority Sectors: Health & Life Sciences

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

Employers report chronic and acute difficulties in recruiting laboratory technicians and scientists which is backed up by the secondary jobs data.

There is significant inward investment into Berkshire and surrounding areas such as Oxfordshire which will increase pressure in a tight employment market.

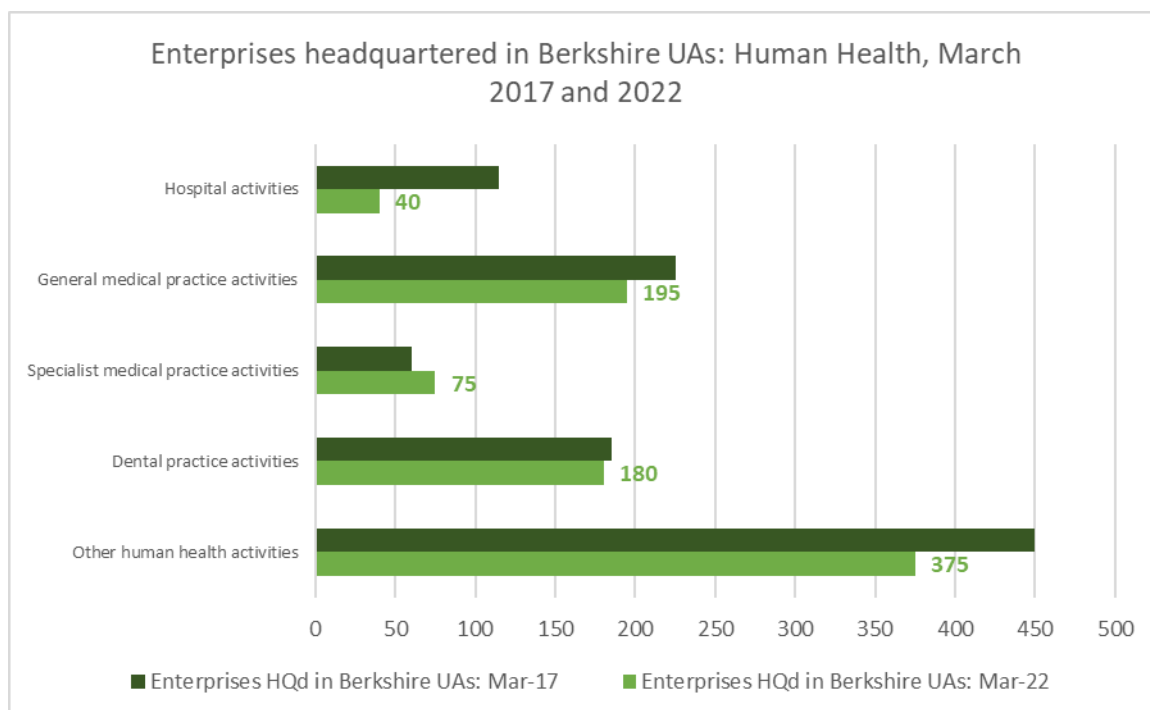
In Life Sciences, there has been a growth in jobs over the last five years, particularly in the Wholesale of Pharmaceutical Goods, and the Manufacture of Pharmaceutical Products and Preparations.

1.0 Businesses

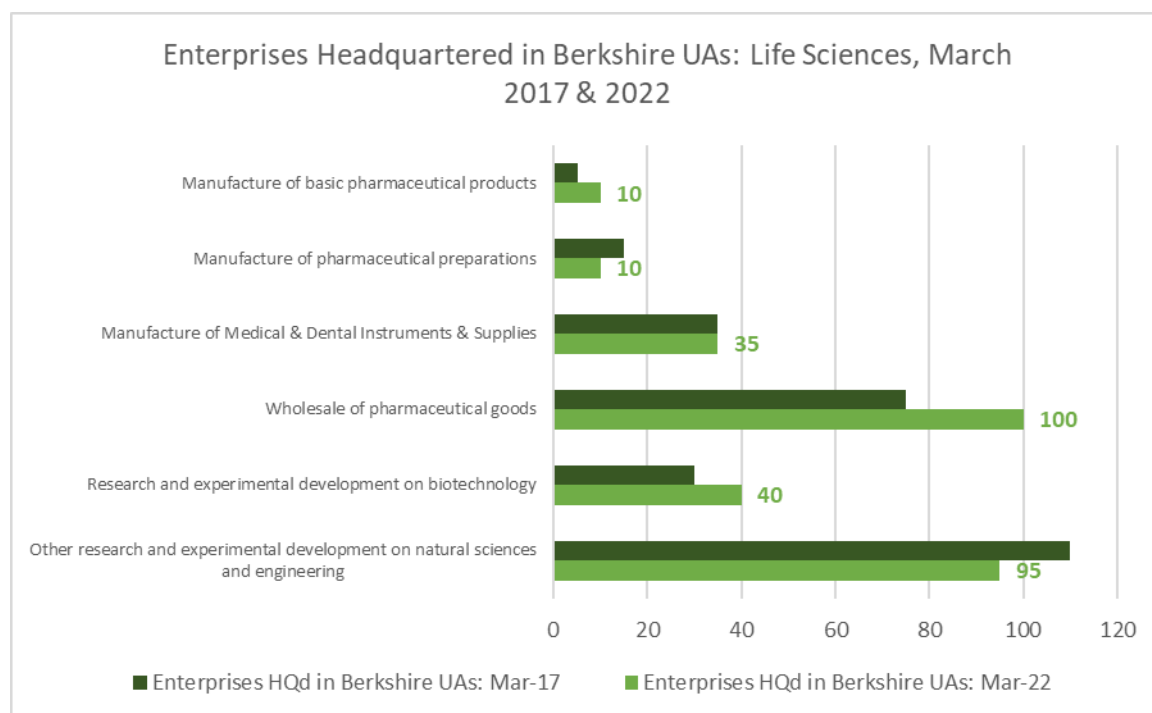
In early 2022,⁴⁶ there were 865 businesses involved in Human Health in Berkshire – a decrease of 16% (170) on the number on the Business Register in earlier 2017. The majority were micro (705) or small enterprises (130), whilst 25 were medium-sized and <5 were large employers.

Within Life Sciences, there were 290 businesses in Berkshire– an increase of 7% (20) on the number on the Business Register in early 2017. The majority were micro (190) or small enterprises (70), whilst 20 were medium-sized and 10 were large employers.

Within Life Sciences, there were rises in the number of Biotech companies (+33% / +10) and Wholesale of Pharmaceutical Goods (+33% / +25) companies.



⁴⁶ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>
<https://www.ons.gov.uk/businessindustryandtrade/business>

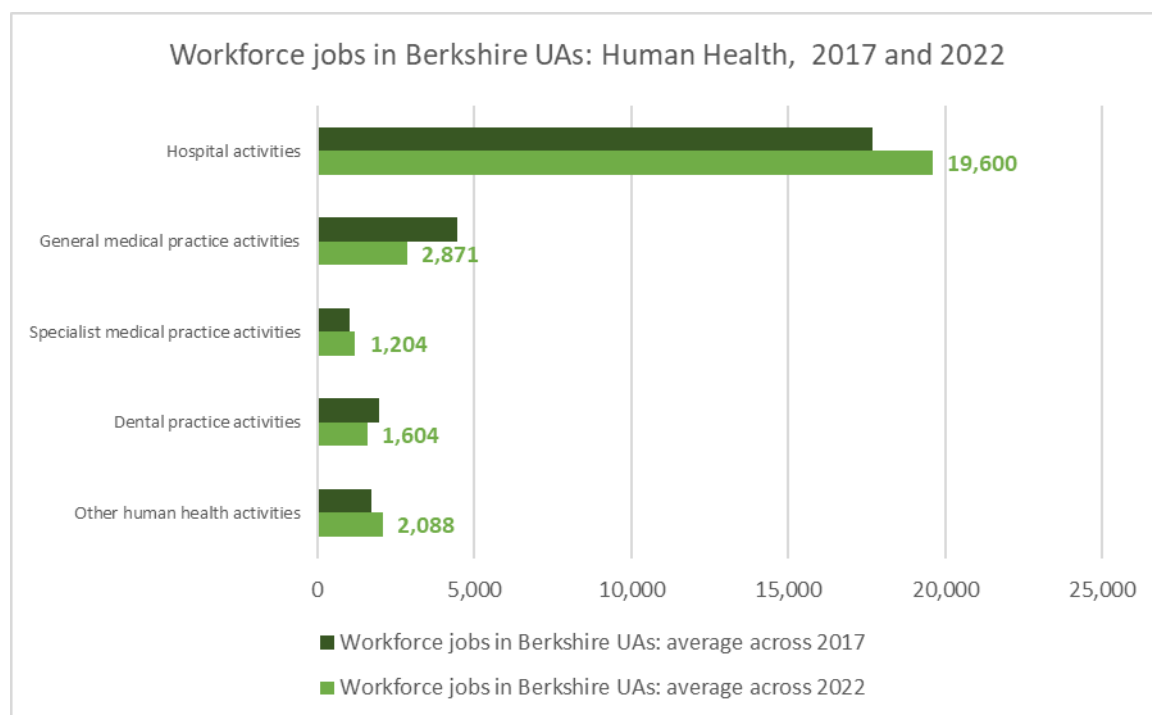


2.0 Jobs- Analysis of Changes from 2017-2022

Whilst the number of enterprises in Human Health decreased, the number of workforce jobs in the sector increased by 2% (500) over the same period (2017-2022) to 27,400. Of note, there was:

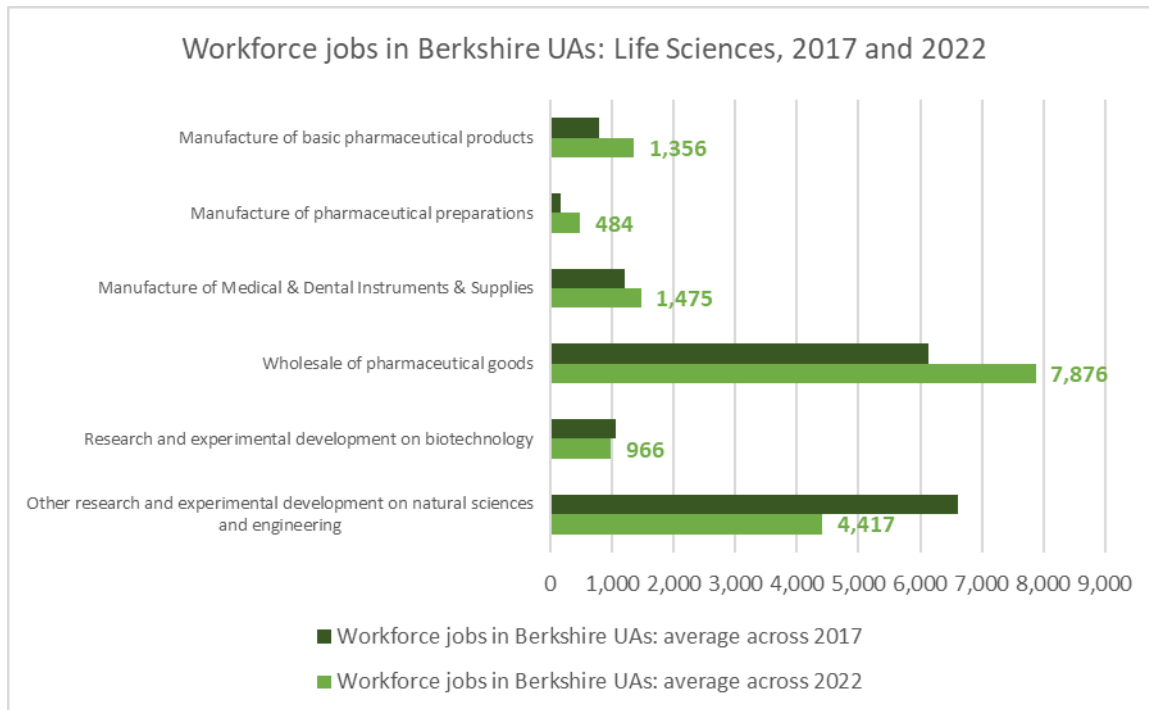
- An 11% (1,900) increase in jobs in Hospital Activities

Table 1



In Life Sciences, the number of jobs increased by 7% (1.2k) over the same period to 15.1k. Of note, there was:

- A 28% (1,700) increase in jobs in the Wholesale of Pharmaceutical Goods
- A 216% (300) increase in the number of jobs in the Manufacture of Basis Pharmaceutical Products
- A 73% (600) increase in jobs in the Manufacture of Pharmaceutical Preparations

Table 2Source: ONS, **UK Business Counts**

The detailed occupation analysis is shown below.

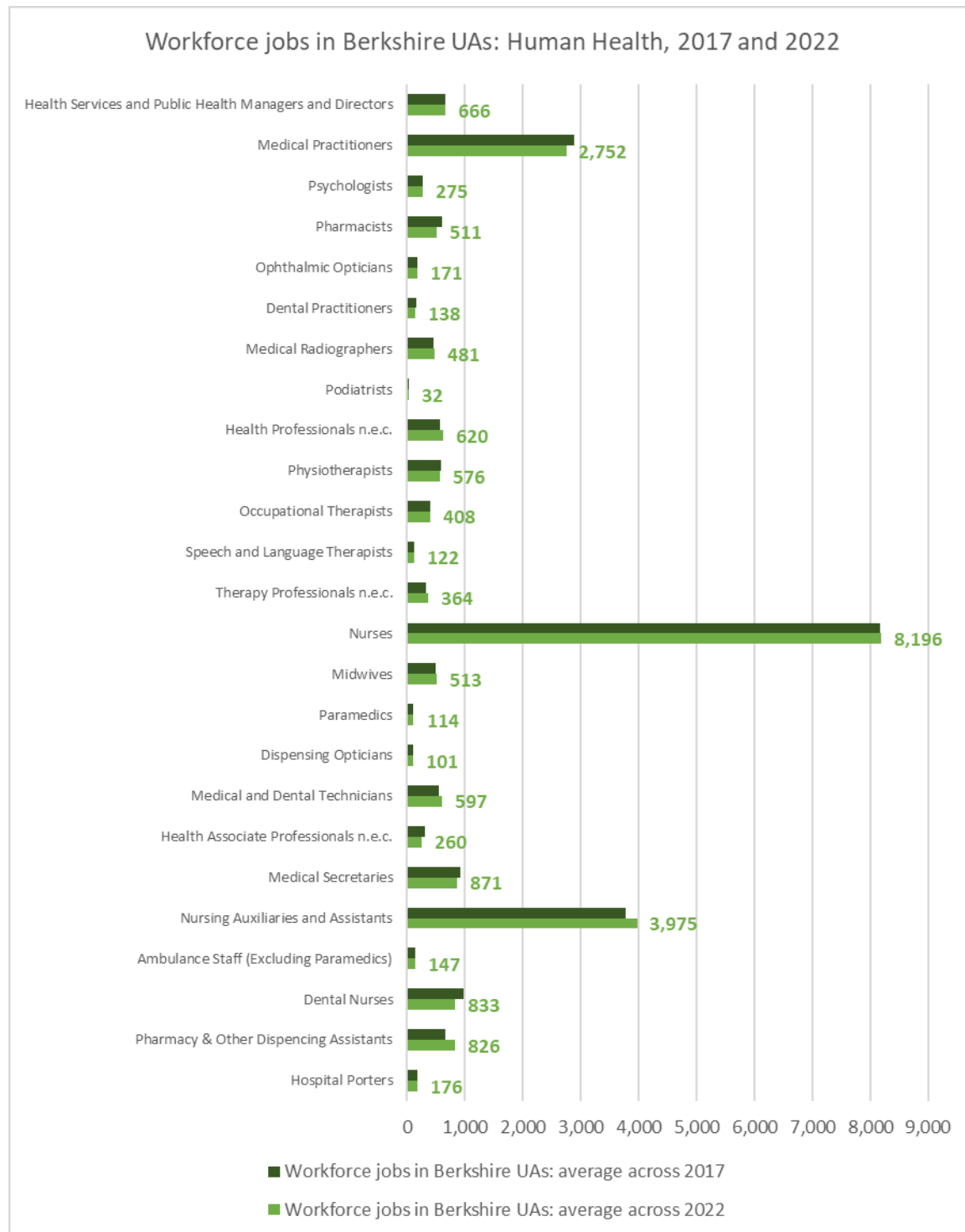
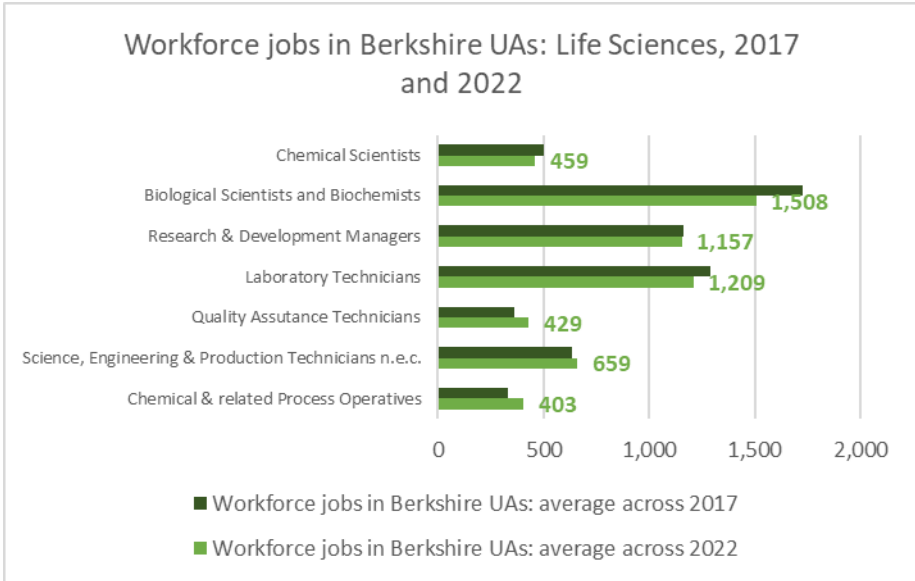
Table 3

Table 4



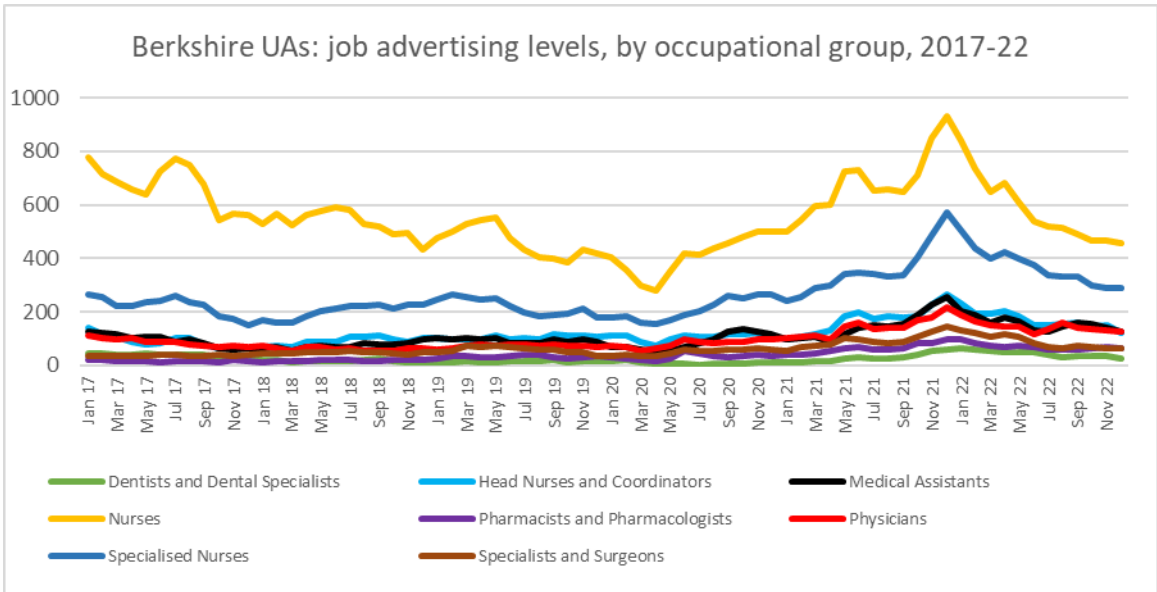
Source: Lightcast

3.0 Job Vacancies

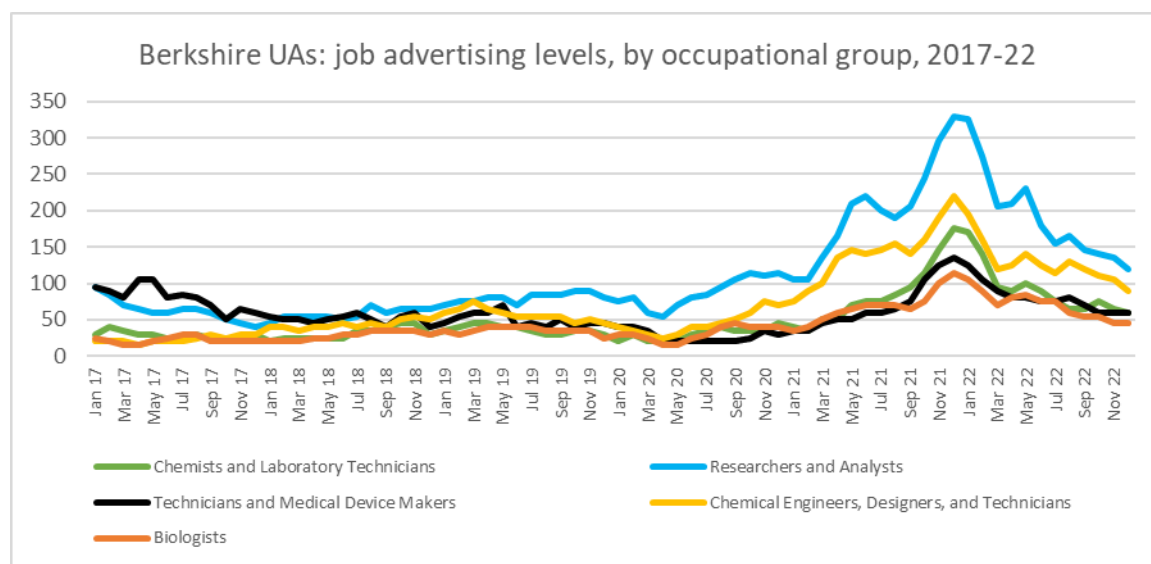
The jobs vacancy data suggests that key roles are hard to recruit.

For Health, job vacancy levels are higher than pre-pandemic levels. They remain notably higher, for Care Assistant and Care Manager and Nursing.

In Life Sciences, all job vacancy rates are higher than pre-pandemic levels. And they remain notably higher for jobs as Researchers & Analysts, Chemical Engineers, Chemists and Lab Technicians.



Source: Textkernal



Source: Textkernel

3.1 Further Factors to Consider

As noted above, demand for Health services will continue to rise due to the ageing population.

Within the Thames Valley, the Life Sciences and Healthcare sector is one of the most important, having more than 135 companies and 8,000 employees, and benefiting from a number of world leading academic institutions and industry centres of excellence.

The region is at the heart of the wider 'Golden Triangle' which links Oxford with London and Cambridge – one of the densest clusters in Europe, comparable to international super-clusters such as the one in Massachusetts.

The South-East has one of the largest concentrations of biopharmaceutical companies in the UK, with many of the leading organisations having a base in Berkshire including Boehringer Ingelheim.

Belgian pharmaceutical giant UCB will be investing £1 billion in R&D including £150-200 million in a new state-of-the-art facility near their existing R&D base in Slough, which will house an early manufacturing site and a hub for UK commercial operations and support around 650 high-skilled jobs. The decision was announced as part of the Government's Life Sciences Sector Deal.

German-owned Bayer, one of the world's top ten pharmaceutical companies, which operates in the small molecule segment, has its UK Headquarters in Reading, having recently relocated within the region.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Secondary Data)
Biologists	2112
Chemists	2111
Laboratory Technicians	3111 Laboratory Technician
Production Scientists	3111 Laboratory Technician
Nurses	2231 Other nursing professionals
Radiographers	2254 Medical radiographers
Occupational Therapists	2222 Occupational therapists
Data Analysts	2135 Actuaries, economists, and statisticians

In this sector, three roles are highlighted. In addition, employers continue to report difficulties in the other roles so they have also been included for consideration.

Priority Sector: Care

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

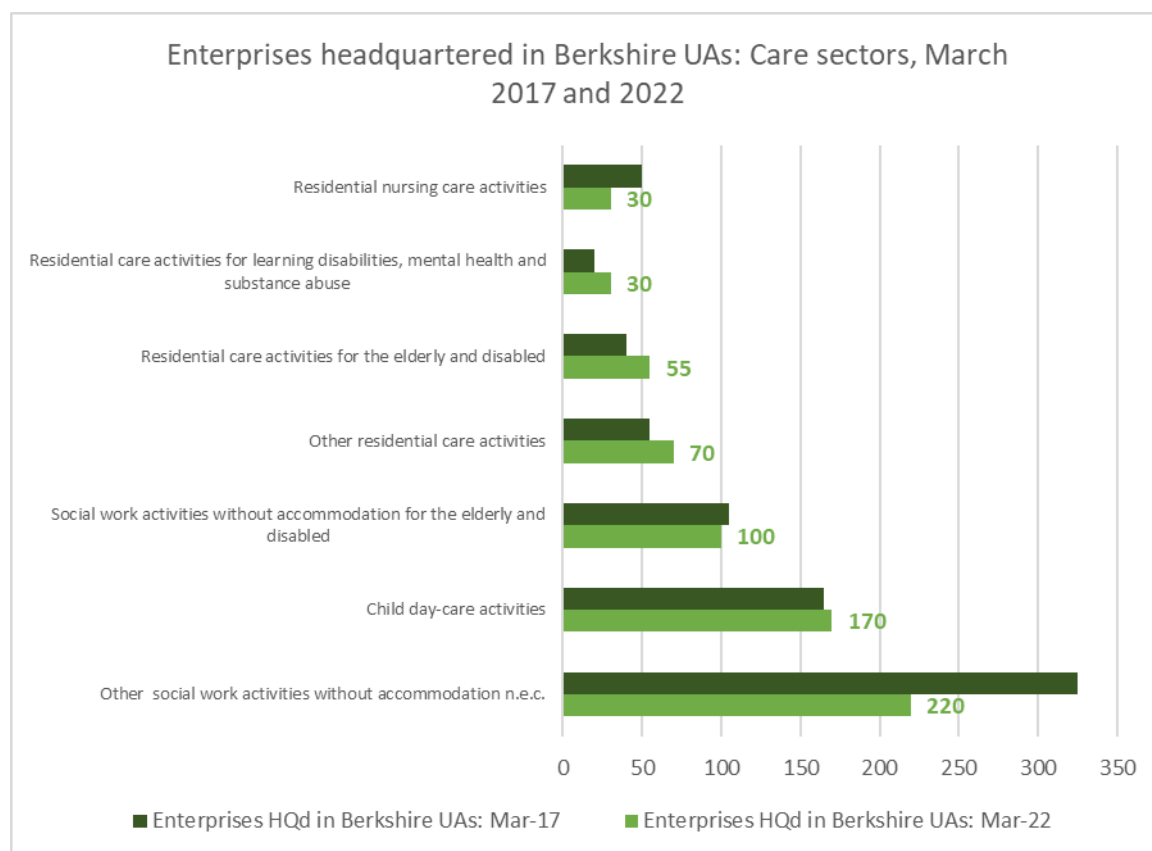
The ageing population in Berkshire will drive demand for this industry.

Although vacancies are being filled through strategies such as overseas recruitment, this is driving needs for upskilling in language and cultural awareness, and upskilling for leadership & management.

Another concern is the funding for registered manager training, which is set to end in May 2023. Employers are asking who will provide and fund this training in the future.

1.0 Businesses

In early 2022⁴⁷, there were 675 businesses involved in 'Residential Care and Social Work without Accommodation' headquartered across Berkshire – a decrease of 11% on the number on the Business Register in earlier 2017. The majority were micro (415) or small enterprises (205), whilst 50 were medium-sized and 5 were large employers.



Source: ONS, **UK Business Counts**

⁴⁷ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>
<https://www.ons.gov.uk/businessindustryandtrade/business>

2.0 Jobs- Analysis of Changes from 2017-2022

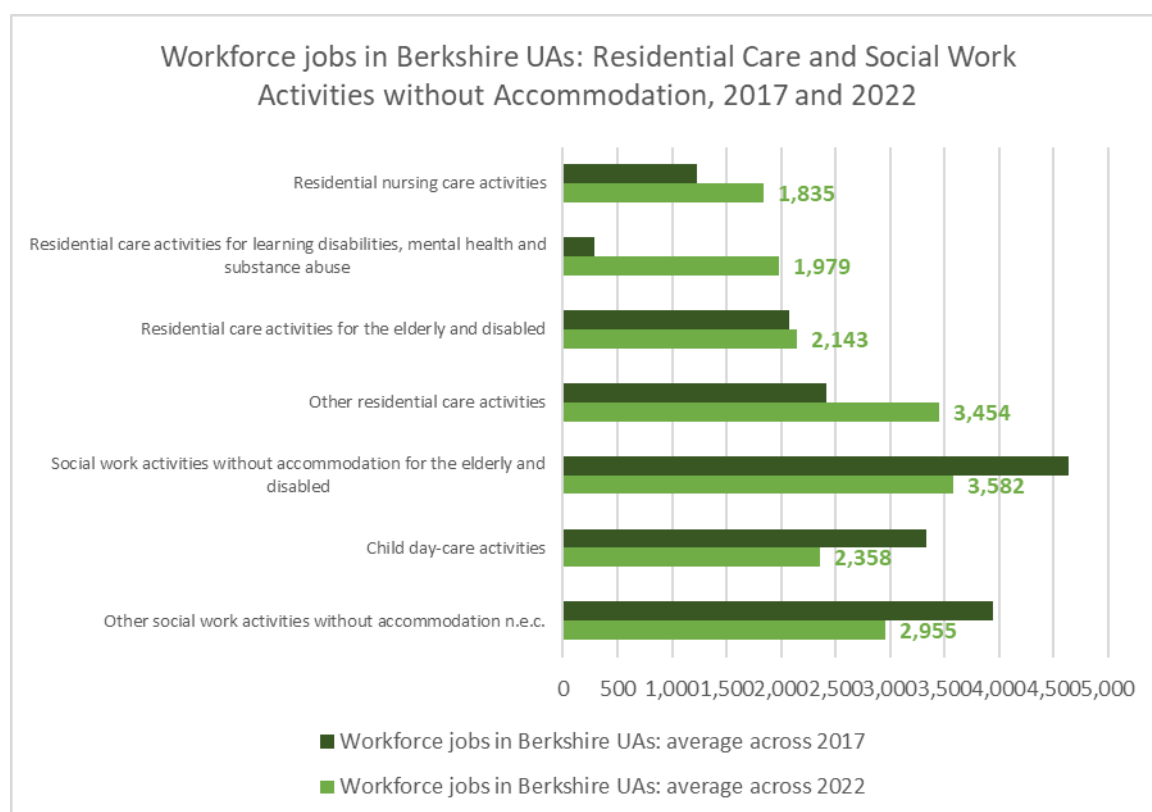
The total number of jobs in this sector in Berkshire in 2022 was 18,300. This compares to 17,900 in 2017.

Whilst the number of enterprises decreased by 11%, the number of workforce jobs in the sector increased by 2% (400).

These included:

- A 57% (1,700) increase within Residential Care Activities for Learning Disabilities, Mental Health & Substance Abuse
- A 49% (600) increase within Residential Nursing Care Activities
- A 43% (1,000) increase within Other Residential Care Activities

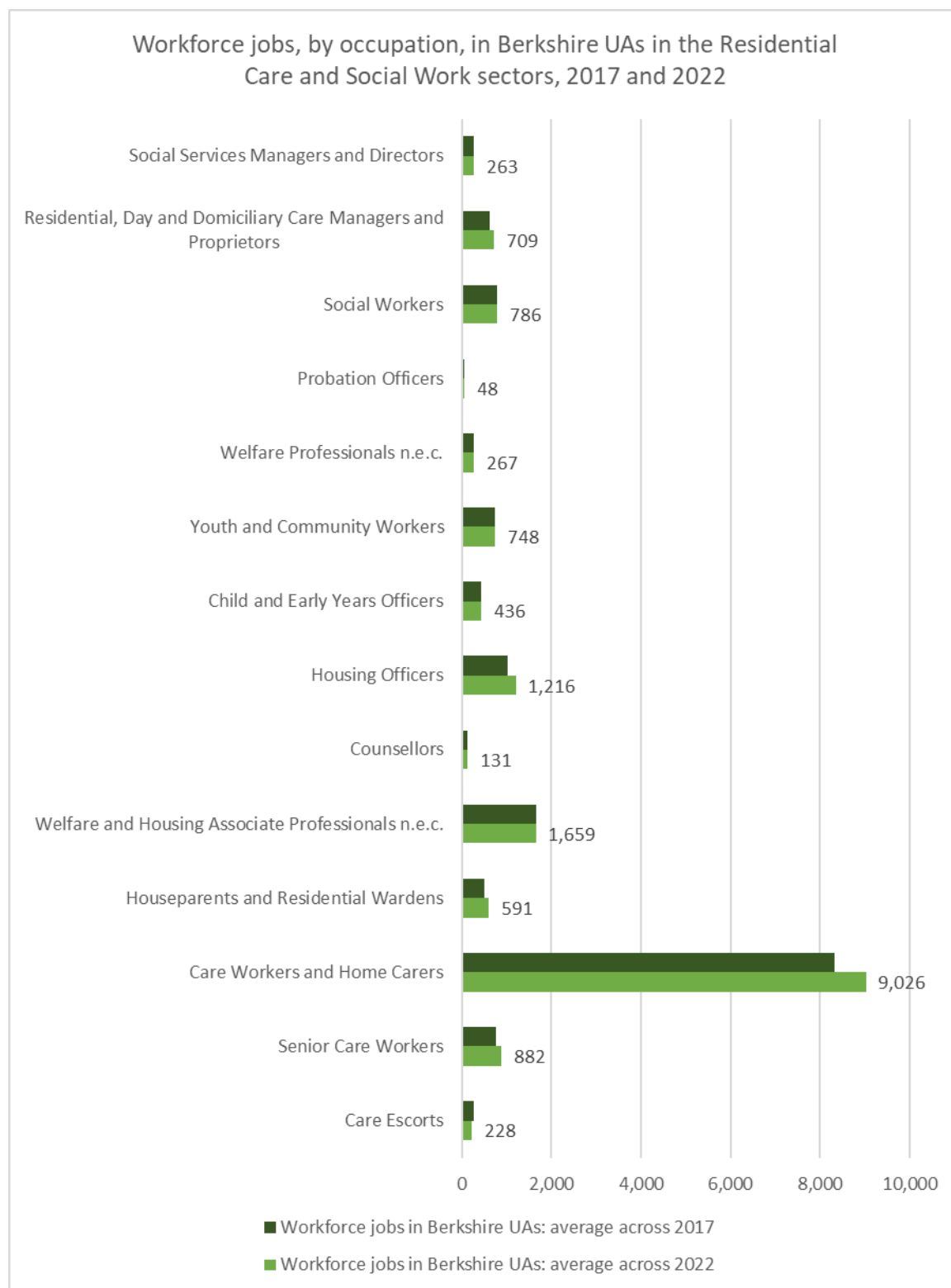
Table 1



Source: Lightcast

More granular analysis (Table 2) shows the occupations where workforce jobs increased, there was:

- A 19% (200) increase in the number of Housing Officers' jobs.
- A 9% (700) increase in the number of Care Workers and Home Carer jobs.
- A 15% (100) increase in the number of Residential, Day and Domiciliary Care Managers and Proprietor jobs.
- A 17% (100) increase in the number of Senior Care Worker jobs.

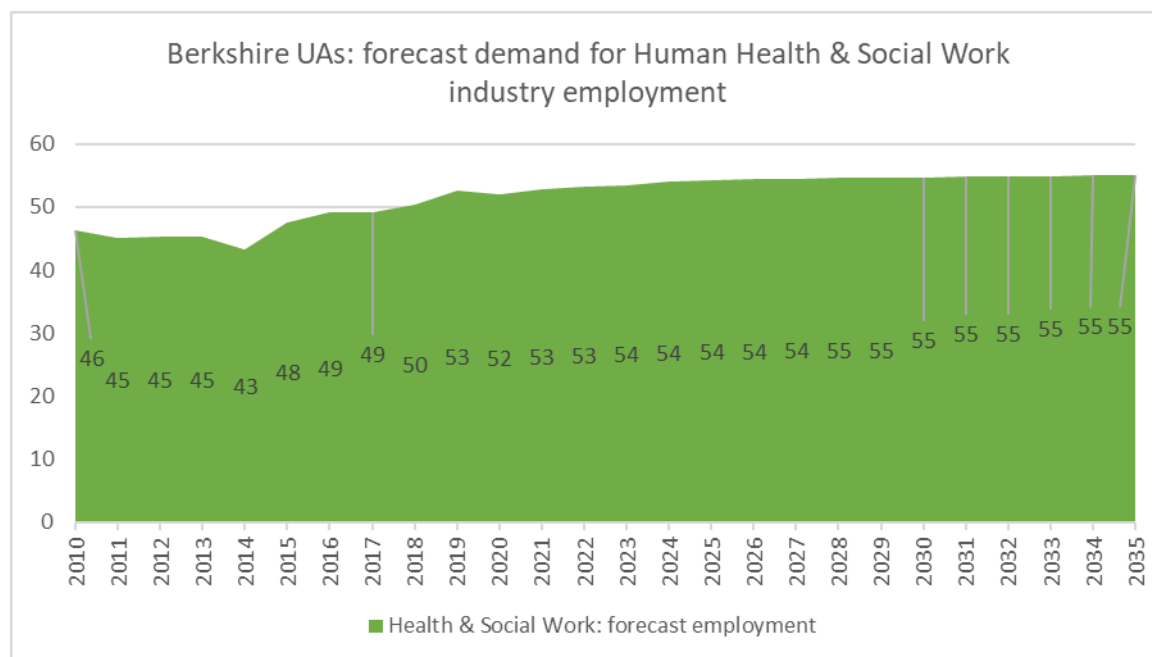
Table 2

Source: Lightcast

3.0 Jobs- Forecast Demand

An overview for the wider Health & Social Work serves as a useful window on future potential demand.

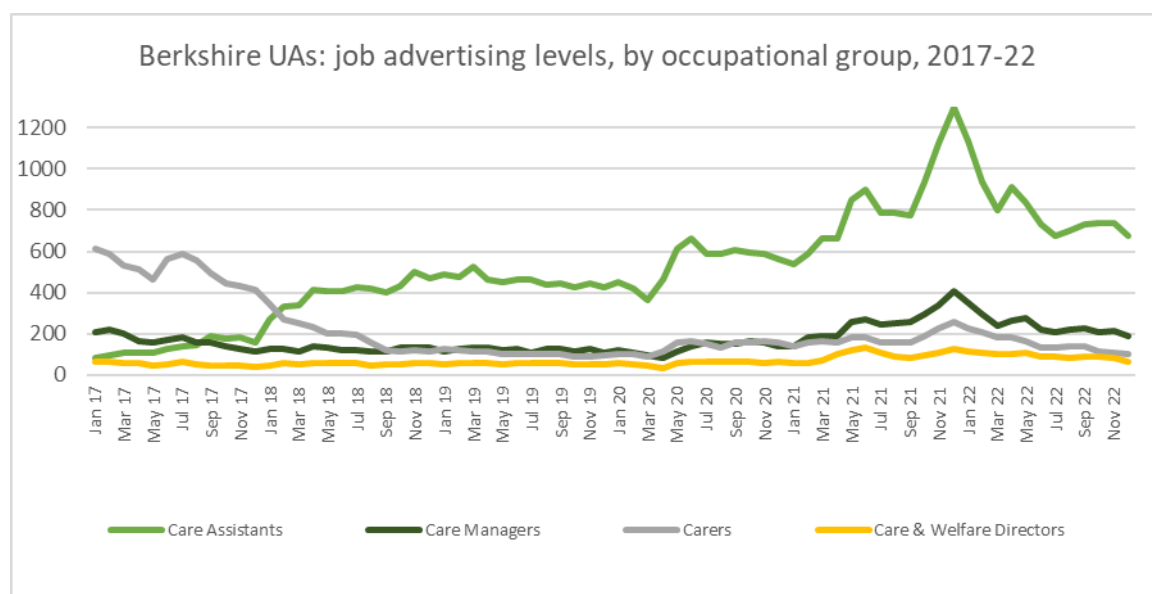
Across Berkshire⁴⁸, the Care sector is forecast to require just an additional 2,900 workers by 2035. In addition, however, there is also a forecast for 29,700 replacement workers over the period 2020-35, summing to a total of 32,600 workers who will need to be trained and/or upskilled over the period.



Source: **Skills Imperative 2035**

3.1 Job Vacancies

Job vacancy levels are higher than pre-pandemic levels. They remain notably higher, however, for Care Assistants and Care Managers.



Source: Textkernal

3.2 Further Factors to Consider

As noted above, demand for Adult Care services will continue to rise due to the ageing population.

⁴⁸ <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>

Employers have also given us feedback that, as they seek to plug vacancies with overseas recruitment, training may be required in English and cultural awareness.

Employers have also suggested that Catering courses could include specific content to prepare the potential workforce for working in Care- for example, knowledge about texture modification.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Secondary Data)
Adult Care Worker	6145 Care workers and home carers
Manager	6145 Care workers and home carers
Chefs	5434 Chefs

Priority Sector: Haulage & Logistics

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

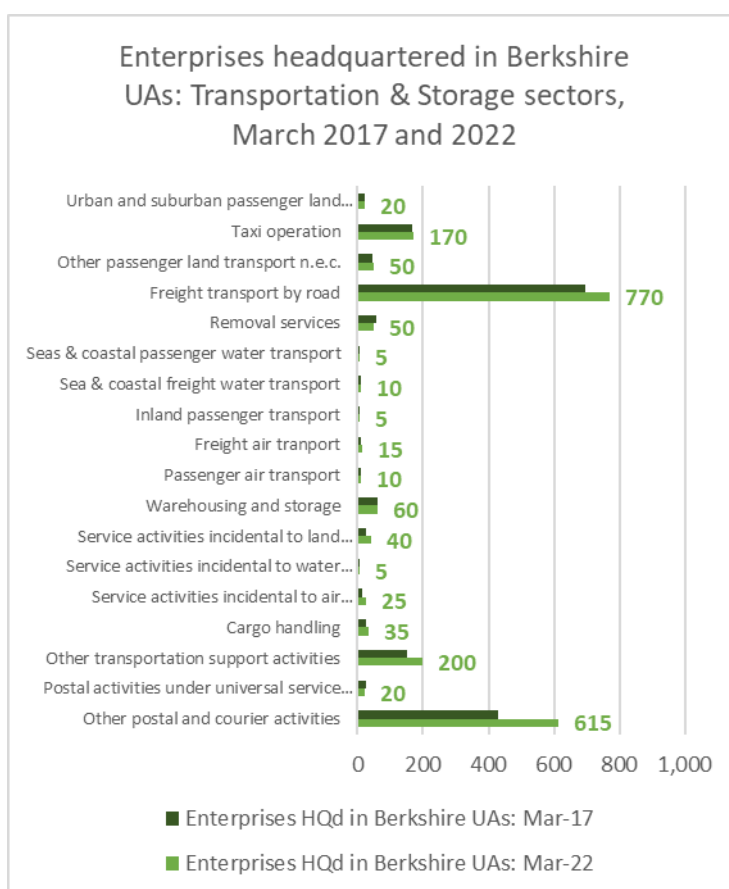
Skills requirements are heavily influenced by changing technology and automation.

Advertised demand for the key occupational groups-Freight Drivers, Vehicle Mechanics, and Warehouse Workers- remain high. This, coupled with reductions in the numbers of people engaged in these occupations over the last five years suggests a shortage.

1.0 Businesses

In early 2022⁴⁹, there were 2,115 businesses involved in 'Transportation & Logistics in across Berkshire – an increase of 17% (360) on the number on the Business Register in earlier 2017. The majority were micro (1,935) or small enterprises (125), whilst 45 were medium-sized and 10 were large employers.

The biggest enterprise growth over the five-year period has been in the number of companies involved in Freight Transport by Road, increasing by 11% (75), and Other Postal & Courier Activities, increasing by 43% (185).



Source: ONS, **UK Business Counts**

⁴⁹ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>
<https://www.ons.gov.uk/businessindustryandtrade/business>

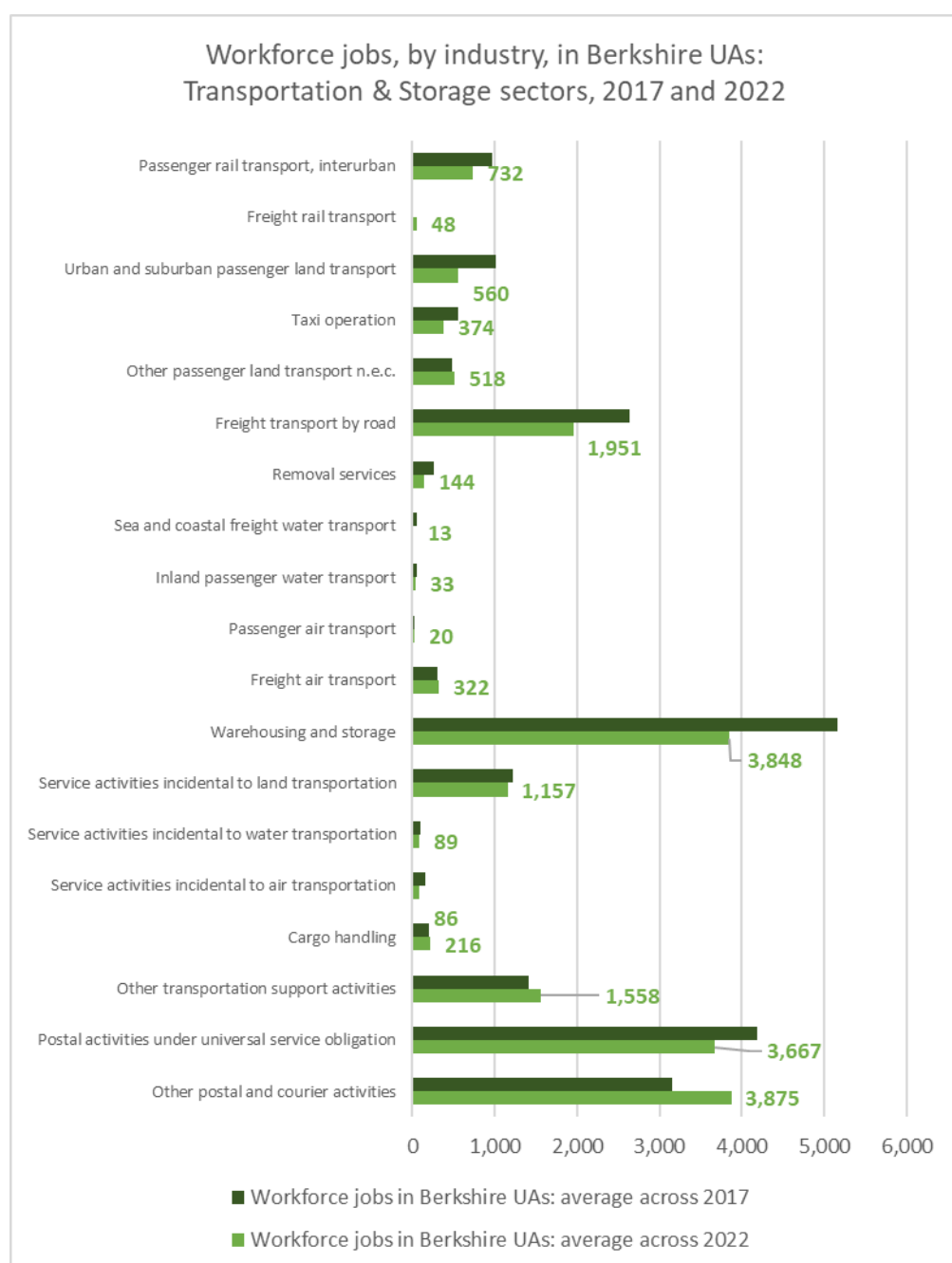
2.0 Jobs- Analysis of Changes from 2017-2022

Whilst the number of enterprises increased by 17%, the number of workforce jobs in the sector fell by 13% (2,700k) over the same period. This included significant reductions within:

- Warehousing & Storage (-25% / -1,300)
- Freight Transport by Road (-26% / -700)
- Urban & Suburban Passenger Land Transport (-45% / -500)
- Postal Activities under universal service obligations (-12% / -500)
- Passenger Rail Transport, interurban (-25% / 200)

In contrast, there was an increase in the number of workforce jobs within Other Postal & Courier Activities (+23% / +700).

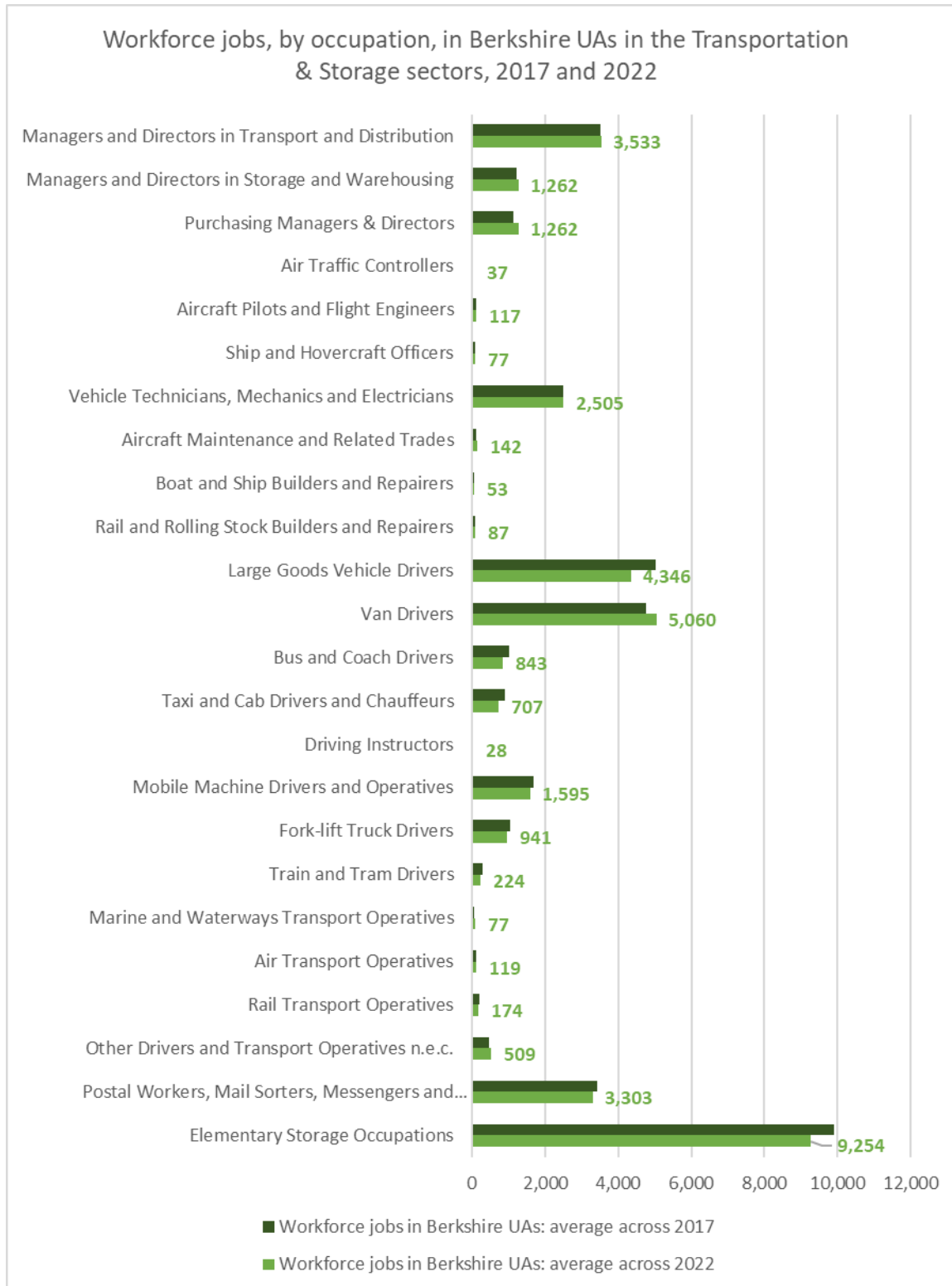
Table 1



And at a detailed occupational level, downturns in numbers include:

- A 13% (700) reduction in the number of Large Goods Vehicle Drivers
- A 7% (700) fall in the number of workers in Elementary Storage Occupations

Table 2



Source: Lightcast

3.0 Jobs- Forecast Demand

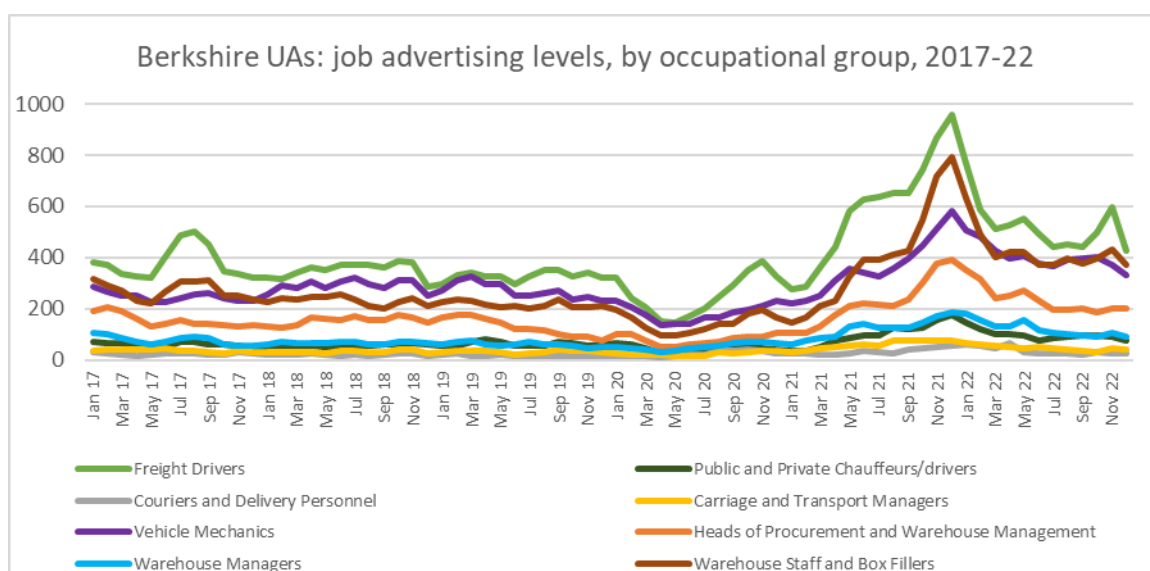
Growth within the Transportation & Storage industry across Berkshire is forecast to remain relatively static in the near and medium term, requiring just an additional 1.6k workers by 2035. In addition, however, the employers within the sector within Berkshire are forecast to require 10.8k replacement workers over the period 2020-35, summing to a total of 12.4k workers who will need to be trained and/or upskilled over the period.

Employers also report significant upskilling needs as the industry responds to new technologies and automation.

3.1 Job Vacancies

Job vacancy levels, by core occupational group, increased through 2021 and early 2022, and remain higher than pre-pandemic levels.

Moreover, advertised demand for the key occupational groups-Freight Drivers, Vehicle Mechanics, and Warehouse Workers- remain high. This, coupled with reductions in the numbers of people engaged in these occupations over the last five years suggests a shortage.



Source: Textkernal

3.2 Further Factors to Consider

The following announcement will bring increased demand:

Walker Logistics has announced that work would commence in early 2023 on the development of a new 125,000 ft² warehouse just off the M4 in Berkshire. The facility will be constructed alongside the company's existing 250,000 ft² logistics centre in the region.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Secondary Data)
Drivers	8211/00 Large goods vehicle drivers
Maintenance	5231 Vehicle technicians, mechanics, and electricians
Custom Clearing Agents	1133 Managers in logistics 4134 Managers in transport and logistics

Priority Sector: ICT

The following section explores this identified priority sector in more detail to inform the LSIP, as well as providing secondary data analysis to check and triangulate the employer feedback received.

Summary

Berkshire's economy is critically dependent on the ICT sector which generates nearly a quarter of its GDP. It is vital that the skills needs are met to enable businesses to remain competitive.

Whilst the number of enterprises has reduced in the ICT sector in recent years, the workforce has continued to grow, particularly in graphic and web design and computer programming and software development.

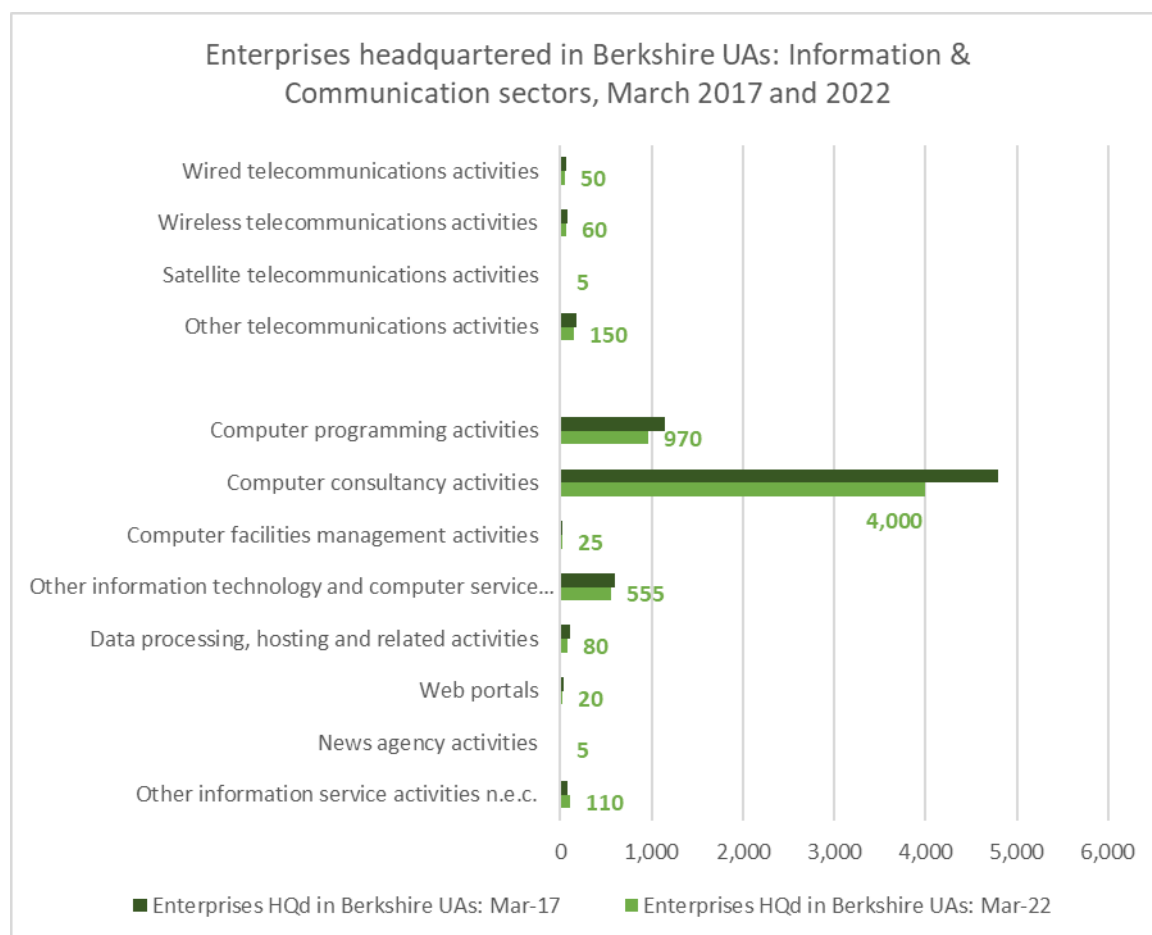
The forecast growth and significant replacement demand of 48k jobs up to 2035 will add pressure onto an employment market that is already tight as evidenced by businesses who report difficulties in recruiting to key roles. All the identified hard to recruit roles by employers are supported by the Secondary Data.

1.0 Businesses

In early 2022⁵⁰, there were 6,060 businesses involved in 'IT, Telecoms and Information' activities in Berkshire. This was a decrease of 15% compared to the number on the Business Register in 2017. The majority were micro businesses, with 120 medium-sized and 35 large enterprises. All the decrease was for micro businesses.

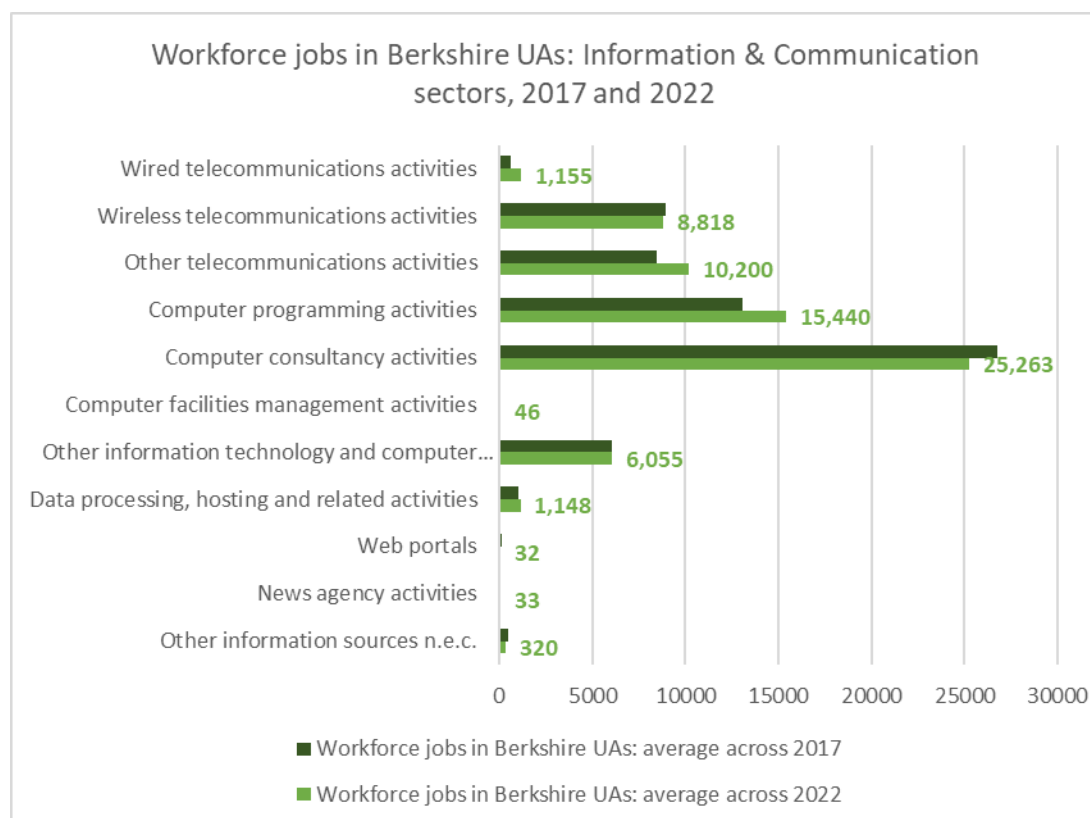
The number of enterprises in most sub-sectors declined over the five-year period, most acutely within Computer Consultancy Activities, where there was a 20% (800) reduction. The changes to the Off-Payroll protocols in 2021 are likely to have been a key contributor to this reduction, when the demand for workers through Personal Service Companies (single director Ltd Companies) declined.

⁵⁰ <https://www.gov.uk/government/statistics/business-population-estimates-2022/business-population-estimates-for-the-uk-and-regions-2022-statistical-release-html>

Source: ONS, *UK Business Counts*

2.0 Jobs- Analysis of Changes from 2017-2022

Table 1

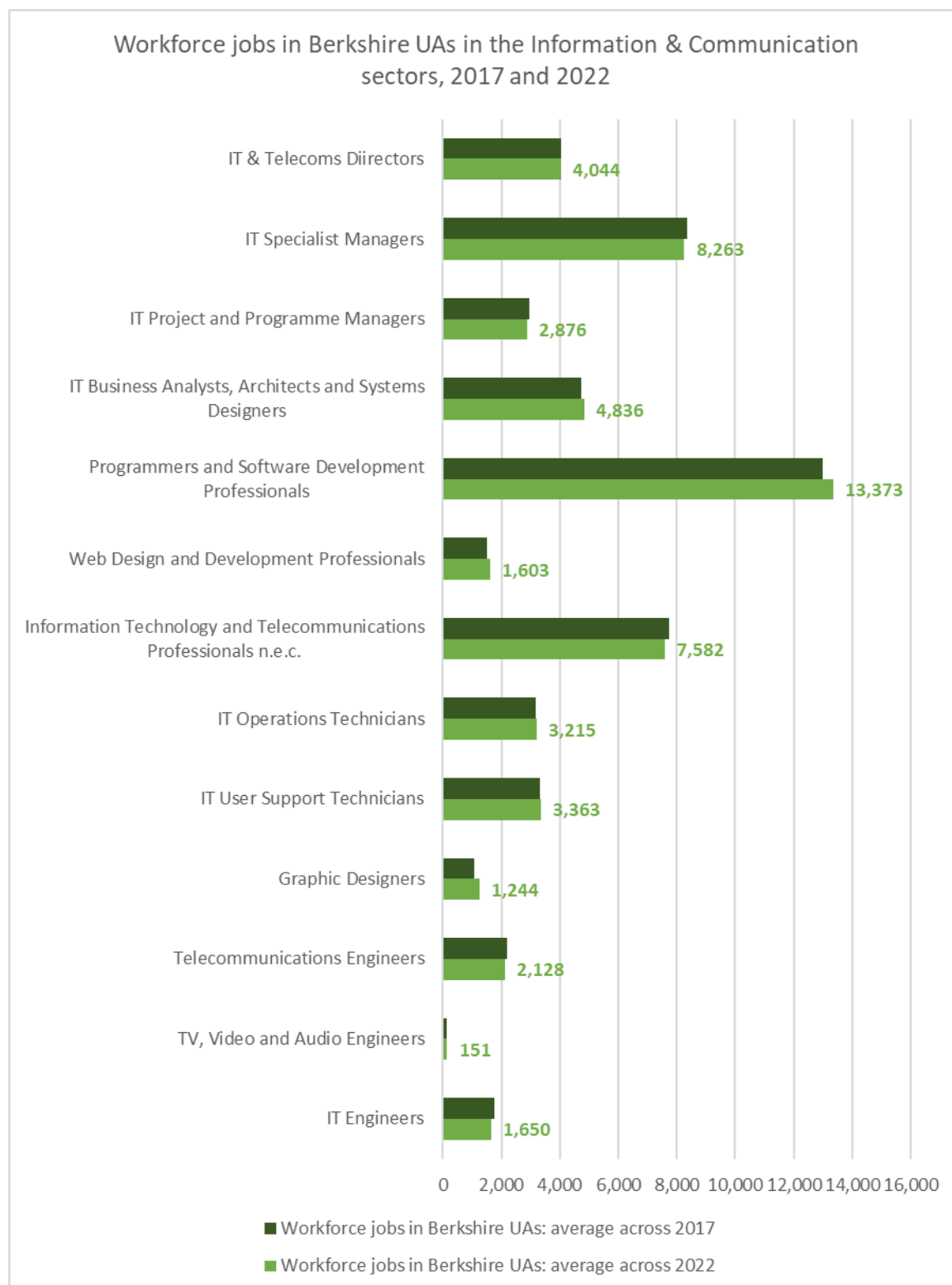


Source: Lightcast

A review of workforce jobs by sector shows that job numbers rose by 4%, despite the 15% decline in enterprises. Of note, there was an 18% increase in Computer Programming Activity and a 20% increase in Other Telecommunications Activities.

By occupation at a more granular level, technical job volumes have been relatively stable (Table 2).

Table 2

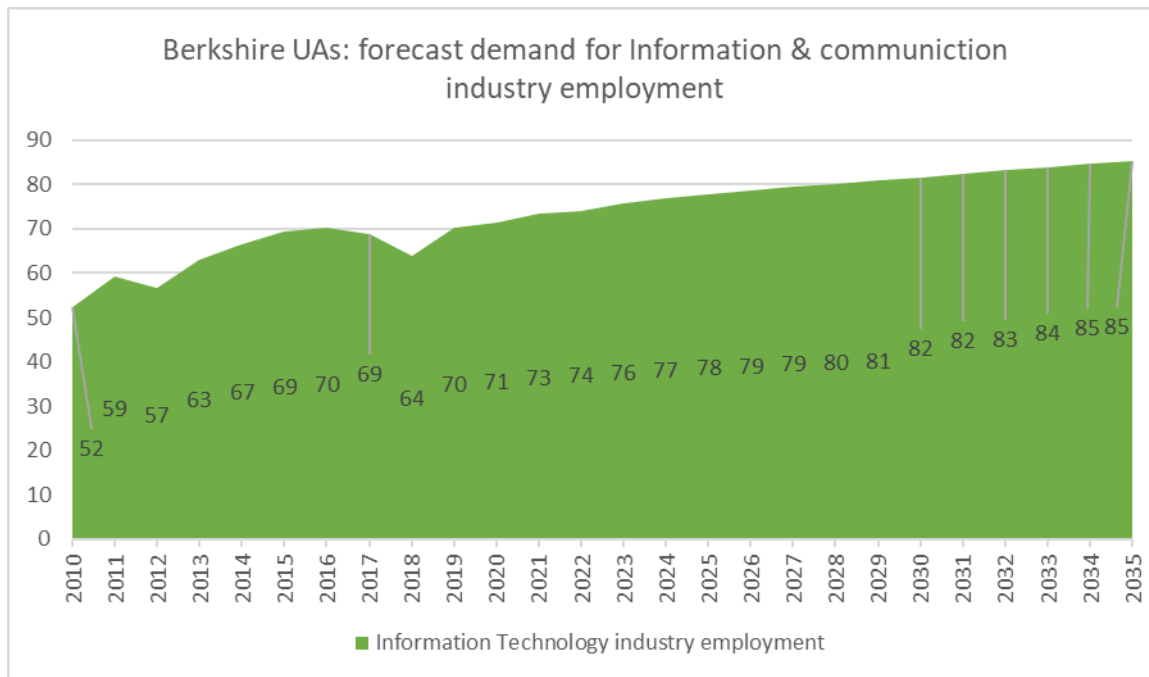


Source: Lightcast

3.0 Jobs- Forecast Demand

Demand within the Information & Communication industry across Berkshire is forecast to continue to increase in size and will require an additional 13,800 workers by 2035⁵¹.

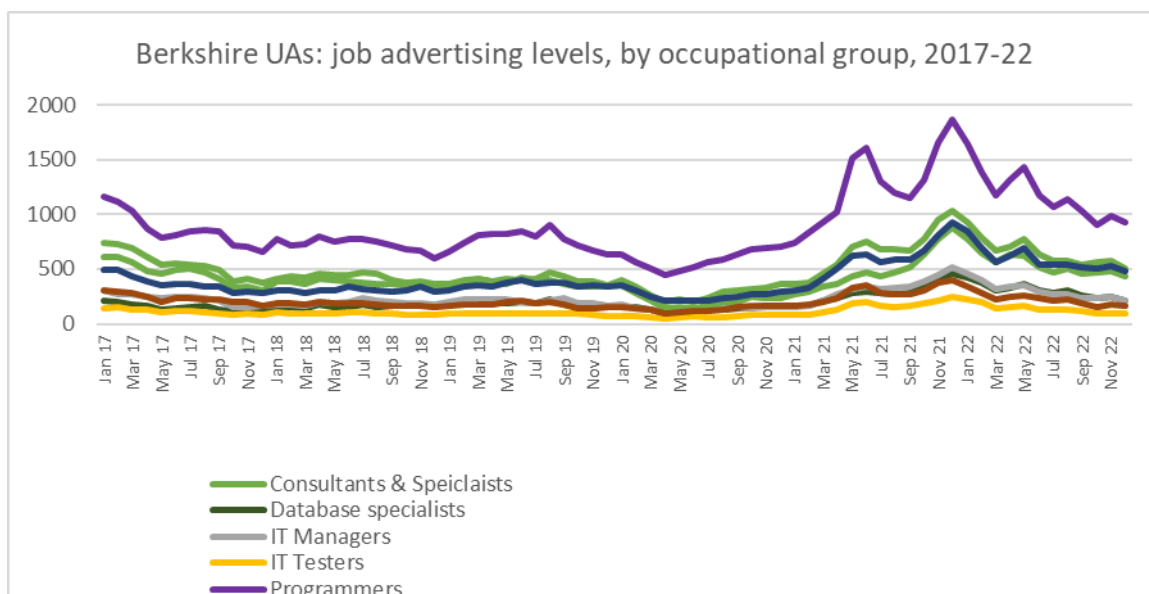
In addition, there is the forecast need for 34,200 replacement workers over the period 2020-35, thereby giving a total of 48,000 workers who will need to be trained and/or upskilled over the period.



Source: **Skills Imperative 2035**

3.1 Job Vacancies

Job vacancy levels, by core occupational group, increased through 2021 and early 2022, and remain higher than pre-pandemic levels.



Source: Textkernal

⁵¹ <https://www.gov.uk/government/publications/labour-market-and-skills-projections-2020-to-2035>

3.2 Further Factors to Consider

Berkshire is significantly dependent on the Information and Communication sector with 14.4% of jobs⁵² in this sector in 2022 compared to 4.7% across England. Further, almost a quarter (24.8%) of Berkshire's GVA⁵³ (2021) is derived from the Information and Communication sector (in contrast to the national average of 6.8%), increased from 10.9% in 2011.

With continuing automation and the rapid advancement of Artificial Intelligence, it is imperative that Berkshire's businesses can access the required IT skilled jobs and remain competitive.

The Employer skills survey (2019)⁵⁴ indicates that the key skillset Berkshire employers want improved most is advanced or specialist IT skills, which is indicative of demand for jobs in this sector.

4.0 Employer Feedback- Triangulation with Secondary Jobs Data

The following occupations were highlighted by employers as those in which they were experiencing recruitment difficulties. These roles have been checked against the secondary jobs data (SOC Code) in Berkshire and nationally. Where there are a much lower number of roles in Berkshire, these are highlighted in yellow as a guide to inform where there may be shortages.

Recruitment Difficulties Reported by Employers	SOC Code (Highlighted if also a Priority Occupation According to Secondary Data)
Cyber Security	3131 Cyber security professionals
Software Developer	2136 Programmers and software development professionals
Data Technician	2135 IT business analysts, architects, and systems designer

⁵² Lightcast

⁵³ https://www.ey.com/en_uk/news/2022/01/pandemic-narrows-the-uk-s-regional-economic-divide-but-only-temporarily-finds-latest-ey-report

[Gross Value Added \(GVA\) - Office for National Statistics \(ons.gov.uk\)](#)
[EY UK Regional Economic Forecast Webcast 2023 | EY UK](#)

⁵⁴ <https://www.gov.uk/government/collections/employer-skills-survey-2019>

References and Data Sources

Data sources

Data	Source	Latest period (release date)
Employment volumes	Annual Population Survey (direct download)	Jan 2022 - Dec 2022 (19/04/23)
Employment by occupation	Annual Population Survey	Jan 2021 - Dec 2021 (12/04/22)
Employment by industry	Annual Population Survey (direct download)	Jan 2022 - Dec 2022 (19/04/23)
Further education and skills achievements and participation by provision, level, and age group	Individualised Learner Record	Aug 2021 – Jul 2022 (31/03/23)
Further education and skills achievements by sector subject area	Individualised Learner Record	Aug 2021 – Jul 2022 (24/11/22)
Highest qualification level by age and gender	Annual Population Survey	Jan 2021 - Dec 2021 (20/04/22)
Enterprises by employment size band	ONS UK Business Counts	Mar 2022 (28/09/22)
Enterprises by employment industry	ONS UK Business Counts	Mar 2022 (28/09/22)
Business demography	ONS Business Demography	Dec 2020 - Dec 2021 (17/11/22)
Key Stage 4 (KS4) destinations	National Pupil Database	Aug 2020 - Jul 2021 (19/20 learners) (02/02/23)
Key Stage 5 (KS5) destinations	National Pupil Database	Aug 2020 - Jul 2021 (19/20 learners) (02/02/23)
Job adverts by profession	ONS Textkernel	Dec 2022 (13/02/23)
Skills Imperative 2035 employment projections by industry, sector, and qualification	Skills Imperative 2035	2035 (16/03/23)

Data information

- Unit for Future Skills
- IfATE Occupational Maps
- RCU Vector Data for Berkshire
- [Gross Value Added \(GVA\) - Office for National Statistics \(ons.gov.uk\)](#)
- [Employer skills survey 2019 - GOV.UK \(www.gov.uk\)](#)
- [Census - Office for National Statistics \(ons.gov.uk\)](#)

References

[EY UK Regional Economic Forecast Webcast 2023 | EY UK](#)

Thames Valley Berkshire Local Skills Report 2022

Towards a Green Jobs and Skills Roadmap for Reading: A Report by Shared Intelligence October 2022
REDA

Maximising the potential of the Screen Sector in the Greater Reading Area February 2023
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Lightcast data TV Berkshire LEP

The Tech Labour Market in Reading, 2023, The British Computing Society