



Skills for Health: Skills and Labour Market Intelligence Briefing for the South East of England, 2010

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1 Introduction

Skills for Health is the Sector Skills Council for the health sector. One of our key activities is the development of skills and labour market intelligence, the aim of which is to help employers understand their current and anticipated future skills needs. It is one of 23 such councils, who together generate skills and labour market intelligence for over 90% of the United Kingdom's workforce.

Skills for Health cover all those working in the sector; public, independent and voluntary. The sector can be technically defined using the 2007 Standard Industrial Classification. A breakdown of the technical codes for the sector and SSC can be found in the Glossary.

The Common Labour Market Intelligence (LMI) Framework, established by the UKCES in 2009, requires all Sector Skills Councils to produce annual Sector Skills Assessments.

This regional briefing is part of an ongoing suite of reports published by Skills for Health. These include:

- UK Sector Skills Assessment Full Report
- UK Sector Skills Assessment Summary Report
- England Skills and Labour Market Intelligence Report
- Scotland Skills and Labour Market Intelligence Report
- Wales Skills and Labour Market Intelligence Report
- Northern Ireland Skills and Labour Market Intelligence Report

The data in this briefing is drawn from a range of secondary data sources including the UK Labour Force Survey (LFS), Annual Business Inquiry (ABI)¹, and the Office for National Statistics (NOMIS). These are robust sources of data that allow us to look at labour market information across all sectors of the UK economy, including the health sector. There may be slight variations in the data due to the differences in the purposes and time frames of the surveys. Where we consider the data is less reliable, or analysis should be treated with caution, this is highlighted within the text. This briefing also draws on commercially available intelligence that profiles the health of South East and England as a whole.

These briefings are just one of a wider suite of outputs we are developing, which includes research on a range of themes important to the sector. Details of our activities and reports can be viewed at www.skillsforhealth.org.uk/workforce-design-development/workforce-strategy/skills-labour-market-intelligence.aspx

¹ Data quality: The ABI is based on a sample survey so estimates are subject to sampling errors which need to be taken into account when interpreting the data. Figures rounded to the nearest hundred.

2 Key Facts

- There are 240,100 people employed in the health sector in the region
- The South East accounts for 15.7% of the England health sector workforce
- The health sector accounts for 6.4% of the region's employment, subregionally this can vary from 2% to 11%
- There is 1 health employee for every 35 people resident in the region and 1 health establishment for every 1,048 people. Subregionally the ratios range from 1 employee to 18 up to 109 people and 1 establishment for every 642 up to 1,591 people
- The Independent Sector accounts for approximately 28% of the health workforce
- The health sector is highly feminised – 79% of the workforce are female compared to 49% in the local economy
- Part-time workers account for 44% of the workforce compared to 31% in the local economy
- Highly qualified – 62% of the health workforce qualified to NVQ Level 4 and above compared to 36% in the local economy
- 23% of health establishments report skills gaps in their current workforce
- 44% of the health sector workforce qualified to NVQ Level 4 and above report having received training in the past 13 weeks compared to 31% qualified to below NVQ Level 2
- In the South East, 121,000 people are expected to retire from the health sector between 2007 and 2017

3 A Profile of Demand for Healthcare in the South East

Key Features

- The largest health group is 'possible future concerns'
- The largest health type is 'affluent professionals, high alcohol consumption, dining out'
- Key theme within the health profile is 'affluent'
- Population Projections show that the population is expected to grow by 1.7 million people between 2008 and 2033

3.1 Introduction

Understanding the market for healthcare provision is a key means of starting to understand the demand for employment and skills in the health sector. A range of organisations are therefore seeking to understand more about the well-being of the United Kingdom's population and these include Public Health Observatories, as well as providers of local healthcare.

3.2 Health Profile

The general trends in healthcare and healthcare provision are played out very differently throughout the regions and subregions of England.

CACI's health and consumer ACORN profiles (A Classification of Residential Neighbourhoods) is one commercially available source of data profiling the demand of healthcare in the UK². This profile provides us with a snapshot of current and possible future health requirements.

Health ACORN classifies households into four main health groups. These are:

- Existing problems – where the levels of illness are above average. The proportion of people with angina is 60% higher than average, the

² These draw extensively from official sources of intelligence, such as the annual population survey, 2001 Census, consumer surveys and expenditure data. These sources enable models of healthcare and consumer demand to be developed on a local, regional and country basis.

proportion who have suffered a heart attack is 45% above average. The incidence of diabetes, high blood pressure and high cholesterol are also above average, and this is the only group where this is the case.

- Future problems – the areas classified as harbouring future problems do not generally have high incidence of existing illnesses. Exceptions to this are depression, asthma and migraine.
- Possible future concerns – these are areas with lower levels of smoking, obesity and average or slightly below average incidence of illness.
- Healthy – the healthy areas tend to have a younger demographic and the proportions of people with high blood pressure, angina, diabetes and high cholesterol are lower than average. This group are likely to take more exercise and less likely to be smokers or overweight.

These four groups are refined into a further twenty-five health types which provide more explanation of household composition, work position, lifestyle and diet. Examples include:

- Home-owning pensioners, traditional diets
- affluent professionals, high alcohol consumption, dining out

Table 1 details the health profile for the South East by the four main health groups and draws comparison to England. Compared to the other eight regions the South East has the lowest proportion of population with existing problems and the highest with possible future concerns.

1. South East Health Profile

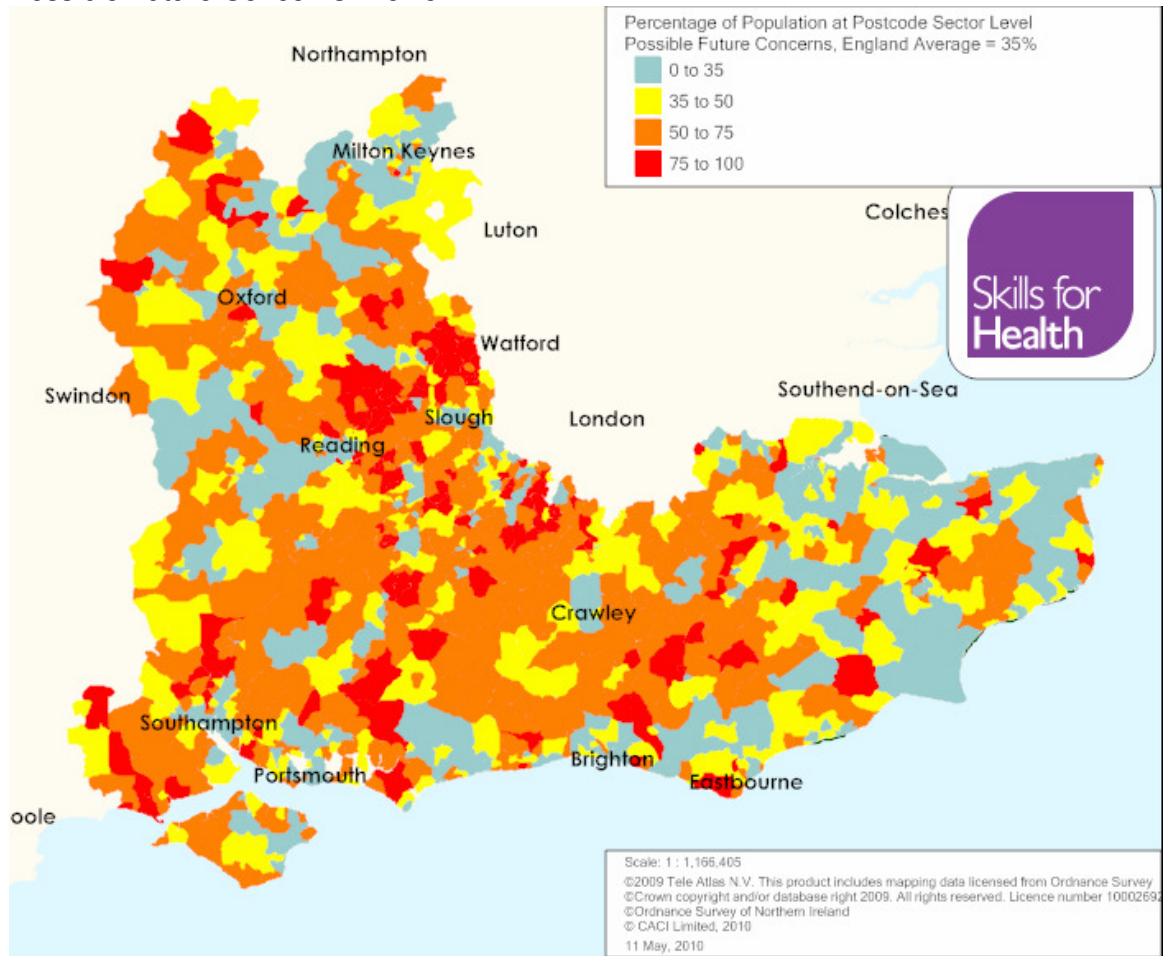
	South East		England	
	Data	%	Data	%
Existing Problems	621,645	7.4	7,011,380	13.5
Future Problems	578,585	6.9	6,231,293	12.0
Possible Future Concerns	3,715,326	44.0	18,174,048	35.0
Healthy	3,401,885	40.3	19,987,231	38.5
Unclassified	119,344	1.4	479,950	0.9
Total	8,436,785		51,883,902	

Source: CACI, 2009

3.3 Geographical Profile of the South East

Within the South East, the largest group is ‘possible future concerns’ which is well above the average for England. Of the six types that make up this group three are overrepresented in the region. The following map depicts postcode sectors where possible future concerns are higher than the average for England. The average for England is 35% but as the map illustrates, there are multiple pockets of population where the percentage is significantly higher.

Possible Future Concerns Profile



Source: CACI 2009

A detailed health profile for the South East can be found in Appendix 1.

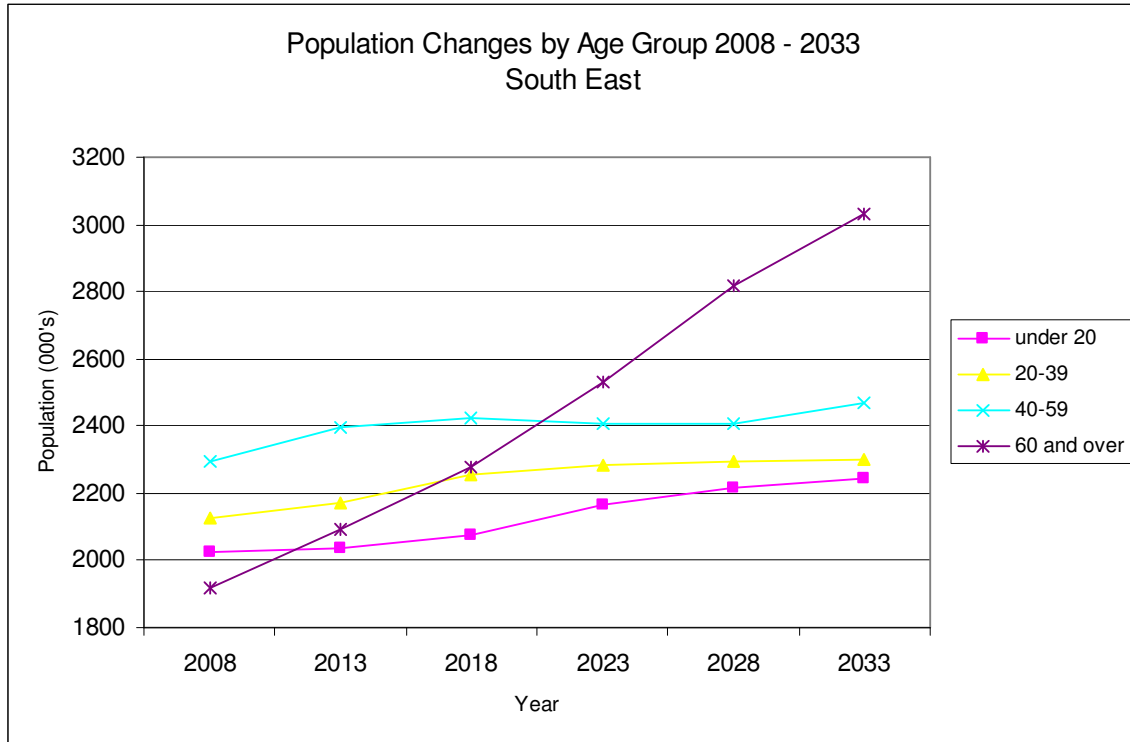
3.4 South East Population Projections

Predicted changes in the population of the region have a double impact on the health sector. Demographic pressures of an ageing population will increase demand for health services, whilst a potentially dwindling labour pool will mean that employers may struggle to supply the labour and skills needed to deliver the services the population needs.

Please refer to heading 5.6.1 to see how the ageing population could impact the health service provision. The charts and tables that follow contain population projections by age group for the region.

Population projections from the Office for National Statistics³ published on 27 May 2010 show that the population is expected to grow by 1.7 million people between 2008 and 2033, the highest of all the regions. Growth in absolute numbers is expected in all age groups but the population aged over 60 will grow at a faster rate than those under 60 years of age.

1 Total Population Changes by Age Group 2008 – 2033



Source: Office for National Statistics Subnational Population projections (SNPP) for England, 2008

Table 2 and Chart 2 show these age groups as a proportion of the total population of the region. These clearly show that there is anticipated to be significant shifts in the proportion of the population of the South East aged 60 years and over and decreases in the proportion of the population aged under 60.

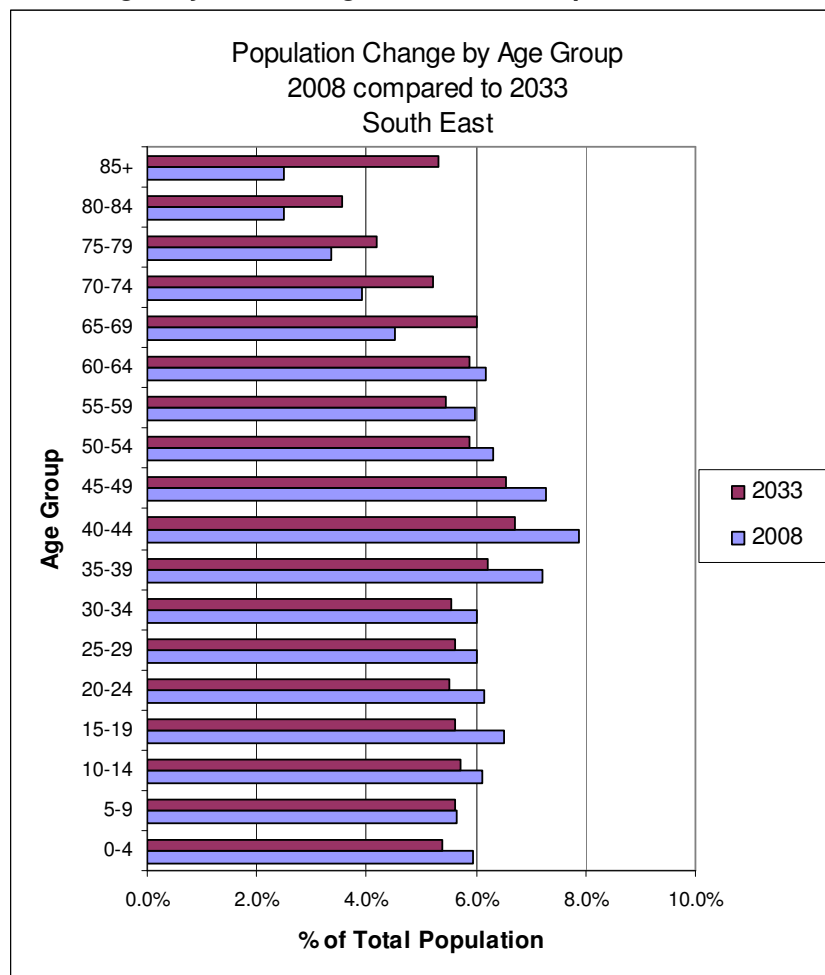
³ Office for National Statistics Subnational Population Projections (SNPP) for England www.statistics.gov.uk/snpp

2. Population Changes by High Level Age Bands as a Proportion of the Total Population

		Time Period					Total Change 2008 to 2033
		2008 to 2013	2013 to 2018	2018 to 2023	2023 to 2028	2028 to 2033	
Age Group	under 20	-0.8	-0.4	0.1	-0.3	-0.5	-1.9
	20-39	-0.4	0.0	-0.7	-0.8	-0.7	-2.5
	40-59	0.1	-0.8	-1.2	-0.9	-0.1	-2.9
	60 and over	1.1	1.2	1.7	2.0	1.3	7.2

Source: Office for National Statistics Subnational Population projections (SNPP) for England, 2008

2 Population Changes by Detailed Age Bands as a Proportion of the Total Population



Source: Office for National Statistics Subnational Population projections (SNPP) for England, 2008

4 The Labour Market in South East

Key Features

- A total of 3.8 million people are employed across all industry sectors in the South East
- The unemployment rate (in those aged 16 plus) as at February – April 2010 across the region was 6.4%
- 11% are employed in human health and social work activities
- Wholesale and Retail Trade is the biggest employer

4.1 Introduction

There has been significant turmoil within the labour market since 2008. The unemployment rate (in those aged 16 plus) as at February – April 2010 across the region was 6.4%, this was an increase of 0.8% on the previous 12 months.

An examination of claimant counts in May 2010 shows a decrease in total claimants within the region, but a continued increase in those claiming for 12 months or more. The number of individuals claiming for 12 months or more has risen from 9,900 in May 2009 to 23,900 in May 2010⁴. This is the highest increase in percentage terms of any region of England.

4.2 Employment by Industry Sector

Table 3 shows employee numbers by Industry (ABI Employee Analysis). The data shows the region is dominated by wholesale and retail trade and human health and social work activities.

Human health and social work activities account for 11% of the labour market. Throughout the regions, this proportion ranges from 9% to 14%.

⁴ Office for National Statistics: Labour Market Statistics June 2010
<http://www.statistics.gov.uk/statbase/Product.asp?vlnk=15084>

3. South East Industry Sector 2008

Industry	South East	
	Data	%
A : Agriculture, forestry and fishing	34,500	1
B : Mining and quarrying	3,600	<1
C : Manufacturing	282,800	8
D : Electricity, gas, steam and air conditioning supply	10,300	<1
E : Water supply; sewerage, waste management and remediation activities	21,400	1
F : Construction	181,100	5
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	664,900	18
H : Transportation and storage	169,200	5
I : Accommodation and food service activities	254,900	7
J : Information and communication	207,800	6
K : Financial and insurance activities	127,000	3
L : Real estate activities	49,800	1
M : Professional, scientific and technical activities	293,900	8
N : Administrative and support service activities	308,800	8
O : Public administration and defence; compulsory social security	158,900	4
P : Education	371,600	10
Q : Human health and social work activities	425,800	11
R : Arts, entertainment and recreation	100,300	3
S : Other service activities	91,200	2
Column Total	3,757,700	100

Source: Annual Business Inquiry Employee Analysis 2008 (SIC 2007)

5 The Size and Structure of the Health Sector in the South East

Key Features

- There are 240,100 people employed in the health sector in the region
- The South East accounts for 15.7% of the England health sector workforce
- The health sector accounts for 6.4% of the region's employment, subregionally this can vary from 2% to 11%
- There is 1 health employee for every 35 people resident in the region and 1 health establishment for every 1,048 people. Subregionally the ratios range from 1 employee to 18 up to 109 people and 1 establishment for every 642 up to 1,591 people
- The Independent Sector accounts for approximately 28% of the health workforce

5.1 Introduction

From the South East health profile, Table 1, we can see that only 7.4% of the region has existing health problems. With those indicating 'possible future concerns' standing at 44%, will the health sector have the skills and resources to meet this potential increase in demand?

The following section looks at the size and structure of the health sector in the South East.

5.2 Size of the Health Sector Workforce

Table 4 details the size of the sector in each of the Government Office Regions. In the South East the health sector employs 240,100 people, accounting for 15.7% of the England workforce, the largest regional proportion.

In the region, employment in the health sector accounts for 6.4% of the total workforce, but the percentage can vary greatly subregionally. Please refer to Table 5.

4. Health Employment by Government Office Region

	Health Employees	Regional Percentage of Total Health Employment	Percentage of Health Employment in Total Economy
East of England	144,900	9.5	6.1
East Midlands	129,300	8.5	6.8
London	226,500	14.8	5.4
North East	81,900	5.4	7.9
North West	220,600	14.4	7.3
South East	240,100	15.7	6.4
South West	159,000	10.4	7.1
West Midlands	158,000	10.3	6.7
Yorkshire and The Humber	169,400	11.1	7.6
England	1,529,700		6.6

Source: Annual Business Inquiry employee analysis 2008 (SIC 2007)
 Figures rounded to nearest hundred

5.3 Health Employment at a Subregional Level

Table 5 shows the size of the health sector workforce as a percentage of the total workforce⁵ within each of the Local Authorities and potentially indicates which subregion will feel the anticipated reductions in funding more strongly.

Within Portsmouth and Southampton 11% of the workforce is employed within the sector, compared to just 2% in West Berkshire and Wokingham.

⁵ Total employed figures are aggregates from which farm agriculture (SIC class 0100) have been excluded

5. Health Sector Workforce as a Percentage of the Local Workforce

Local Authority: county/ unitary	Health	Percentage of workforce employed in Health
Bracknell Forest	2,200	3
Brighton and Hove	9,400	8
Buckinghamshire	12,200	6
East Sussex	15,800	9
Hampshire	25,200	4
Isle of Wight	3,900	8
Kent	37,500	7
Medway	7,000	8
Milton Keynes	6,700	5
Oxfordshire	22,900	7
Portsmouth	11,200	11
Reading	7,700	8
Slough	4,500	6
Southampton	12,000	11
Surrey	35,300	7
West Berkshire	1,400	2
West Sussex	20,800	6
Windsor and Maidenhead	2,900	4
Wokingham	1,600	2
Total	240,100	6

Source: Annual Business Inquiry 2008 (SIC 2007)

5.4 Workforce Growth in the Health Sector and the Economy

In England the workforce remained stable over the period 2007 – 2008. However, this was not the case at a regional level. Table 6 shows the percentage of change experienced at a regional level in the health sector workforce and the total regional workforce.

Between 2007 and 2008, the South East saw a slight increase in the health workforce of 0.1% and a slight increase of 0.7% in the regional economy.

6. Regional Growth in Employment

	2007	2008	Percentage Growth in Health Workforce	Percentage Growth in Regional Workforce
East of England	151,800	144,900	-4.5	1.0
East Midlands	125,100	129,300	3.4	-0.3
London	228,100	226,500	-0.7	1.7
North East	78,900	81,900	3.8	0.4
North West	220,900	220,600	-0.1	-1.2
South East	239,900	240,100	0.1	0.7
South West	162,000	159,000	-1.9	-0.1
West Midlands	163,000	158,000	-3.1	-0.4
Yorkshire and The Humber	160,800	169,400	5.3	-0.3
England	1,530,400	1,529,700	0.0	0.3

Source: Annual Business Inquiry employee analysis 2008 (SIC 2007)

5.5 Health Employment by Local Authority

Table 7 shows the numbers of health sector employees (latest 2008 estimates SIC 86) by Local Authority. The high concentrations reflect both population and regional centres for specialist services.

Within the South East, Kent contains 16% of the total health sector workforce, providing care to 17% of the resident population. Hampshire, however, has only 10% of the workforce providing care to 15% of the resident population.

7. Health Sector Employees by Local Authority, 2008

Local Authority: county/ unitary	86 : Human health activities		Population Estimates	
	Data	%	Data	%
Bracknell Forest	2,200	1	114,700	1
Brighton and Hove	9,400	4	256,600	3
Buckinghamshire	12,200	5	493,300	6
East Sussex	15,800	7	509,900	6
Hampshire	25,200	10	1,285,900	15
Isle of Wight	3,900	2	140,200	2
Kent	37,500	16	1,406,600	17
Medway	7,000	3	253,500	3
Milton Keynes	6,700	3	232,200	3
Oxfordshire	22,900	10	639,800	8
Portsmouth	11,200	5	200,000	2
Reading	7,700	3	145,700	2
Slough	4,500	2	121,200	1
Southampton	12,000	5	234,600	3
Surrey	35,300	15	1,109,700	13
West Berkshire	1,400	1	152,800	2
West Sussex	20,800	9	781,500	9
Windsor and Maidenhead	2,900	1	142,800	2
Wokingham	1,600	1	159,100	2
Total	240,100	100	8,380,100	100

Source: Annual Business Inquiry employee analysis 2008 (SIC 2007)

5.6 Ratio of Health Establishments and Employees

Table 8 shows the ratio of health establishments and employees to the region's resident population. A high ratio could be indicative of easier access to services and regional variations in health system structures. This table is subject to future debate.

Within the South East there is 1 health employee for every 35 people and 1 health establishment for every 1,048 people.

These figures can vary dramatically within the region ranging from 1 employee to every 18 people up to 109 people, and 1 establishment for every 642 people up to 1,591 people. Please refer to Appendix 2 for a subregional analysis.

8. Ratio of Health Establishments and Employees to Resident Population, 2008

	Population		Ratio of 1 Health Data Unit to Resident Population	Ratio of 1 Health Employee to Resident Population
	Mid Year 2008 Estimates	%		
East of England	5,728,700	11.1	1,219	40
East Midlands	4,433,000	8.6	1,167	34
London	7,619,800	14.8	1,003	34
North East	2,575,500	5.0	1,288	31
North West	6,875,700	13.4	1,127	31
South East	8,380,100	16.3	1,048	35
South West	5,209,200	10.1	1,108	33
West Midlands	5,411,100	10.5	1,258	34
Yorkshire and The Humber	5,213,200	10.1	1,303	31
England Total	51,446,200		1,138	34

Source: Annual Business Inquiry employee analysis 2008 (SIC 2007)

5.6.1 Impact of an Ageing population

By 2033 the proportion of the population aged over 50 years is projected to grow by 6.2%. With the current workforce estimates what will be the anticipated demand on the health sector?

Tables 9 and 10 detail the current ratio provision for the population aged 50 years and over and apply the current provision to projected population numbers. We acknowledge that there are far more sophisticated methods and models for forecasting but have included the following analysis as an indication.

For the South East, using latest estimates, there is currently 1 health establishment for every 369 resident population aged 50 years and over. Using population projections and assuming there is minimal growth in the health sector, this ratio could increase to 1 establishment to every 521 people.

In terms of patient care, using the current estimates, there is 1 health employee to every 12 resident population aged 50 years and over. Again using the population projections, by 2033 this ratio will have increased to 1 employee for every 17 resident population.

9. Ratio of Health Establishments and Employees to Resident Population Aged 50 Years and Over, 2008

	2008 Population	Ratio of 1 Health Data Unit to Resident Population	Ratio of 1 Health Employee to Resident Population
	% 50 years and over		
East of England	35.6	434	14
East Midlands	35.3	412	12
London	25.7	259	9
North East	36.1	464	11
North West	34.8	392	11
South East	35.3	369	12
South West	38.5	427	13
West Midlands	34.8	438	12
Yorkshire and The Humber	34.1	445	11
England Total	34.0	387	11

Source: Annual Business Inquiry employee analysis 2008 (SIC 2007)

10. Ratio of Health Establishments and Employees to Projected Population Aged 50 Years and Over, 2033

	Projected 2033 Population	Ratio of 1 Health Data Unit to Resident Population	Ratio of 1 Health Employee to Resident Population
	% 50 years and over		
East of England	41.5	629	20
East Midlands	41.2	578	17
London	29.8	361	12
North East	40.7	576	14
North West	39.6	485	13
South East	41.5	521	17
South West	43.9	590	17
West Midlands	39.3	559	15
Yorkshire and The Humber	37.8	595	14
England Total	39.1	525	16

Source: Office for National Statistics Subnational Population projections (SNPP) for England, 2008

5.7 Health Establishments by Sizeband

In the South East, health establishments account for 17.7% of the total health establishments for England; the highest of all the regions. In the region, health establishments account for 2.0% of all establishments.

11. Health Establishments by Government Office Region

	Health Data Units	Regional Percentage of Total Health Units	Percentage of Health Units in Total Economy
East of England	4,700	10.4	1.9
East Midlands	3,800	8.4	2.2
London	7,600	16.8	1.9
North East	2,000	4.4	2.7
North West	6,100	13.5	2.4
South East	8,000	17.7	2.0
South West	4,700	10.4	2.1
West Midlands	4,300	9.5	2.1
Yorkshire and The Humber	4,000	8.8	2.2
England	45,200		2.1

Source: Annual Business Inquiry 2008 (SIC 2007)

Table 12 indicates the health sector is dominated by micro-establishments. Within the South East, 66% of the total health establishments fall within the sizeband 1 -10 employees (throughout the regions this proportion ranges from 60% to 76%). The establishments within this sizeband will largely consist of medical and dental practices and other human health activities by independent, public and voluntary providers.

12. Size and Structure of the Health Sector Compared to all Sectors, 2008

	Data Units			Employees		
	Health Sector		Total Economy %	Health Sector		Total Economy %
	Data	%		Data	%	
1-10 employees	5,300	66	87	20,900	9	24
11-49 employees	2,100	26	10	49,100	20	25
50-199 employees	400	5	2	40,400	17	24
200 or more employees	100	1	1	129,700	54	28
Total	8,000	100	100	240,100	100	100

Source: Annual Business Inquiry 2008 (SIC 2007)

5.8 Subsector Activity

In analysing data for the Skills for Health footprint Standard Industrial Classification (SIC) codes are used. The most recent SIC codes that have been developed are SIC 2007.

The industrial classification 86, 'Human Health', is made up of five subsectors that define the activities across the health sector. The definitions for each subsector can be found in the Glossary.

Table 13 further supports the analysis in Table 12 that the sector is dominated by the primary care providers in terms of establishments, i.e. dental and medical practices, but in terms of employee numbers, 66% of the workforce is employed within secondary care, i.e. hospital activities.

13. Health Sector by Activity, 2008

	Data Units		Employees	
	Data	%	Data	%
8610 : Hospital activities	1,300	16	159,000	66
8621 : General medical practice activities	2,300	29	28,100	12
8622 : Specialist medical practice activities	200	3	2,500	1
8623 : Dental practice activities	1,700	21	11,000	5
8690 : Other human health activities	2,400	30	39,500	16
Total	8,000	100	240,100	100

Source: Annual Business Inquiry workplace analysis 2008 (SIC 2007)

5.9 Public and Independent Sector

Healthcare is delivered through private and public providers, the public sector being a combination of NHS and Voluntary⁶.

Using annualised Labour Force Survey data we can estimate in the South East the independent sector accounts for 28% of the total healthcare workforce, of which 37% are employed in hospital activities. It is important to note that the percentages are not definitive as employees can work in both, if not all three, sectors.

14. Public and Independent Sector Profile

South East	Independent		Public		Total	
	Data	%	Data	%	Data	%
86.10 Hospital activities	26,577	10	134,357	52	160,933	62
86.21 General medical practice	10,529	4	14,544	6	25,073	10
86.22 Specialist medical practice	4,689	2	607	<1	5,295	2
86.23 Dental practice activities	13,252	5	1,012	<1	14,264	6
86.90 Other human health activities	17,132	7	35,680	14	52,812	20
Total	72,178	28	186,199	72	258,377	100

Source: Labour Force Survey 2009 4 Quarter Average

⁶ Definition used by the Labour Force Survey

6 Workforce Characteristics

Key features

- The health sector is highly feminised – 79% of the workforce are female compared to 49% in the local economy
- The total employed in age band 16-24 years is almost half of those employed in the local economy
- Part-time workers account for 44% of the workforce compared to 31% in the local economy
- Highly qualified – 62% of the health workforce qualified to NVQ Level 4 and above compared to 36% in the local economy

6.1 Introduction

The following section breaks down the healthcare workforce to its component parts. The purpose of this is, where relevant, to highlight any differences when comparing the health sector workforce to the workforce of the whole economy and the health sector in England.

6.2 Age Profile

The age profile of the existing workforce is essential to workforce planning when factoring in the demand for replacement.

The total employed in age band 16-24 years is almost half of those employed in the whole economy in the South East and in England. This is most likely due to the time taken to qualify for specialist roles.

15. Age Profile

	South East		England	
	Health %	Whole Economy %	Health %	Whole Economy %
16-24 years	7	13	6	13
25-34 years	20	20	20	22
35-44 years	28	25	28	25
45-54 years	27	24	28	23
55-64 years	16	15	16	14
65 years and over	3	3	2	3

Source: Labour Force Survey 2009 4 Quarter Average

6.3 Gender Profile

The health sector is a highly 'gendered' sector with the majority of roles being taken by women. Using the latest estimates from the Annual Business Inquiry we can see:

- Gender ratio: female 79%/male 21% compared to female 49%/male 51% in the local economy
- 44% of the workforce are part-time (throughout the regions this proportion ranges from 31% to 49%) compared to 31% in the local economy
- Of the part-time workforce (44%) only 5% are male

16. Gender and Employment Status Profile

	South East			
	Health	%	Whole Economy	%
Male Full-Time Workers	38,300	16	1,583,000	42
Male Part-Time Workers	11,200	5	322,500	9
Female Full-Time Workers	97,200	40	1,010,500	27
Female Part-Time Workers	93,400	39	841,600	22
Male	49,500	21	1,905,600	51
Female	190,600	79	1,852,100	49
Full-Time Workers	135,500	56	2,593,500	69
Part-Time Workers	104,600	44	1,164,200	31
Total	240,100	100	3,757,700	100

Source: Annual Business Inquiry 2008 (SIC 2007)

6.4 Ethnicity Profile

There is a greater diversity of ethnicity in the health sector workforce than the whole economy. This is a pattern that is repeated across England

17. Ethnicity Profile

	South East		England	
	Health %	Whole Economy %	Health %	Whole Economy %
White	85	93	85	90
Non-White	15	7	15	10

Source: Labour Force Survey 2009 4 Quarter Average

6.5 Highest Qualification Held Profile

The health sector is highly qualified with 62% of the health sector workforce of the South East holding qualifications equivalent to NVQ Level 4 and above (throughout the regions this proportion ranges from 57% to 65%). This is higher than the average across the sector in England (60%) and significantly higher than the workforce across all sectors of the South East (36%).

The differences in those qualified to Levels 2 and Levels 4 of the South East and the English health sector could be accounted for by the focus across the sector on developing assistant practitioners and the extended career opportunities that these roles create.

18. Highest Qualification Held

	South East		England	
	Health %	Whole Economy %	Health %	Whole Economy %
NVQ Level 4 and above	62	36	60	35
NVQ Level 3	10	19	11	18
NVQ Level 2	12	18	12	18
Below NVQ Level 2	8	13	8	13
Other qualifications	6	8	6	9
No qualifications	2	6	3	7

Source: Labour Force Survey 2009 4 Quarter Average

6.6 Major Occupation Group Profile

The majority of the workforce can be found in Associate Professional and Technical and Personal Services occupations. This is not surprising given the nature of the health sector.

Associate Professional and Technical include nurses, therapists and midwives etc. whilst Personal Service occupations include nursing auxiliaries, nursery nurses etc.

19. Major Occupation Profile

	South East		England	
	Health %	Whole Economy %	Health %	Whole Economy %
1 Managers and Senior Officials	6	18	7	16
2 Professional occupations	19	14	17	14
3 Associate Professional and Technical	39	15	38	15
4 Administrative and Secretarial	14	11	14	11
5 Skilled Trades Occupations	1	10	1	10
6 Personal Service Occupations	16	9	18	9
7 Sales and Customer Service Occupations	0	7	0	7
8 Process Plant and Machine Operatives	1	5	1	7
9 Elementary Occupations	4	10	4	11

Source: Labour Force Survey 2009 4 Quarter Average

7 Skills Gaps, Skills Shortages and Provision of Training

Key Features

- 23% of health establishments report skills gaps in their current workforce
- The main areas of reported skills gaps are technical, practical or job specific skills and customer handling skills
- 84% of health establishments have provided training in the past 12 months
- 44% of the health sector workforce qualified to NVQ Level 4 and above report having received training in the past 13 weeks compared to 31% qualified to below NVQ Level 2

7.1 Introduction

The National Employers Skills Survey 2009 (NESS 2009) for England is the latest in a series of employer surveys conducted since 2003. The survey, from the UK Commission for Employment and Skills and its partners, provides robust and reliable information from employers in England on recruitment difficulties, skills deficiencies, and workforce development to help in the development of policy and influence actions to address skills issues.

In comparison with the previous surveys the NESS 2009 shows that there has been a marked increase in skills gaps across the health sector, with the proportion of employers reporting skills gaps increasing from 16% to 22%. The proportion of employers reporting skills shortages has however remained stable at 4% and the proportion reporting vacancies has reduced from 24% in 2007 to 20% in 2009.

These findings are consistent with the changes across the labour market that are expected at times of recession, although it should be noted that those sectors with a strong public sector presence such as health have reported higher levels of activity around vacancies and recruitment than sectors dominated by the private sector. This may indicate that at the time

of the survey the health sector may not have felt the full effects of the recession

7.2 Skills Gaps and Shortages

Skills gaps are said to exist at an establishment when the employer indicates that staff at the establishment are not fully proficient at their jobs. The number of skills gaps refers to the number of staff not fully proficient.

Table 20 shows that skills gaps across the South East affect a similar proportion of employers but a higher proportion of employees than the average across the sector as a whole within England. This may be indicative of skills gaps being concentrated in larger employers, but more analysis would be necessary in order to draw firm conclusions.

20. Establishments with Skills Gaps by Region

Region	% with skills gaps	
	Establishments	Employees
East of England	23	6
East Midlands	19	15
London	18	5
North East	21	5
North West	23	3
South East	23	13
South West	25	10
West Midlands	24	8
Yorkshire and the Humber	21	7
England Average	22	8

Source: NESS, 2009
Base: Column 2 - All establishments and Column 3 - All employees

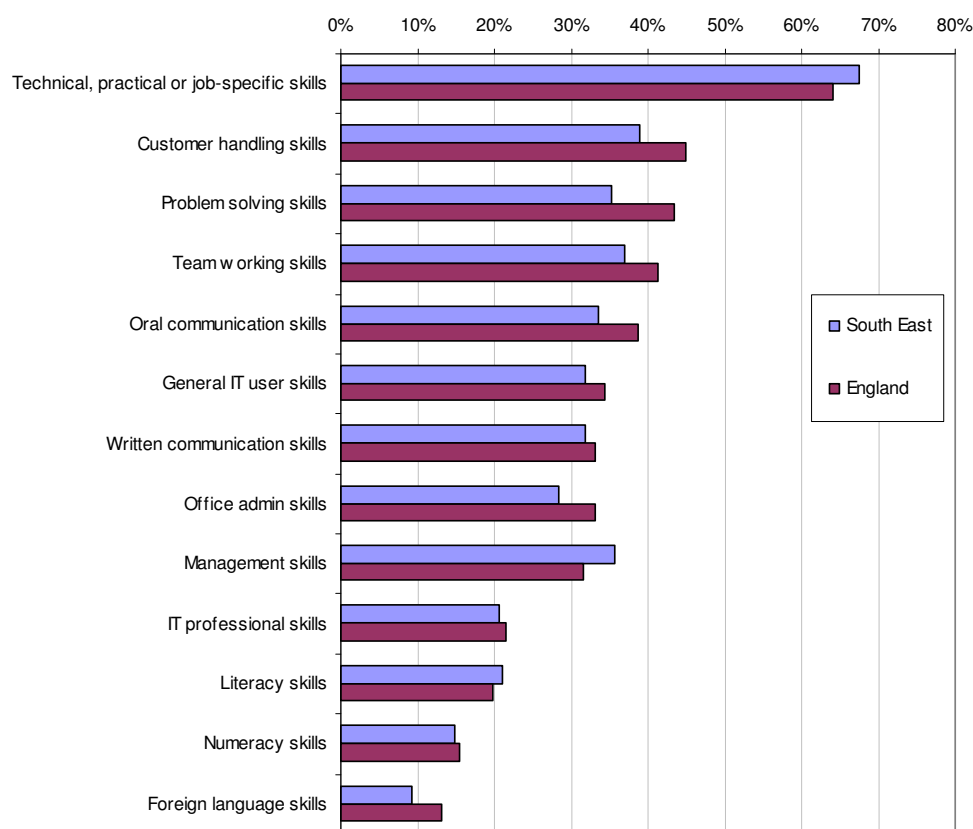
The 2009 National Employers Skills Survey for England⁷ shows that the main areas of reported skills gaps within the South East are:

- Technical, practical or job specific skills (68%)
- Customer handling skills (39%)

Chart 3 shows a comparison of the skills that health sector employers in the South East highlight as needing to be improved compared with the averages for the sector across England.

⁷ National Employer Skills Survey 2009, Data Site <http://researchtools.lsc.gov.uk/ness/itab/default.asp>

3 Skills That Need Improving



Source: NESS, 2009

7.3 Vacancies Within the Health Sector

The National Employers Skills Survey for England provides an overview of vacancies at a sectoral level including hard-to-fill vacancies and skills shortage vacancies.

The latest survey shows that a higher proportion of establishments in the health sector report vacancies, and at a sectoral level the health sector reports the highest level of hard-to-fill vacancies.

Table 21 shows the proportion of employers reporting vacancies, hard-to-fill vacancies and skill shortage vacancies.

21. Vacancies, Hard-to-Fill Vacancies and Skill Shortage Vacancies

	Health Sector	Whole Economy
% of all employers reporting vacancies	20	12
% of all employers reporting hard-to-fill vacancies	7	3
% of employers reporting Skill Shortage Vacancies	4	4

Source: NESS, 2009
Base: All establishments

Table 22 shows the percentage of all employers in the health sector reporting vacancies at a regional level.

22. Employers Reporting Vacancies in the Health Sector

	% of employers reporting vacancies	
	Health Sector	Whole Economy
East of England	23	12
East Midlands	23	11
London	18	14
North East	20	12
North West	17	11
South East	21	13
South West	21	12
West Midlands	19	11
Yorkshire and the Humber	18	12
England Average	20	12

Source: NESS, 2009
Base: All establishments

The figures for hard-to-fill vacancies and skill shortage vacancies are not available at a regional level due to low baselines, however, an indication of vacancies at occupational level gives us an indication of high vacancy rates and specific occupations experiencing higher turnover or difficulties.

7.4 Jobcentre Plus Vacancies and Claimant Count

Based on 27 occupations, in May 2010, 1,045 people claiming Job Seekers Allowance (JSA) were actively looking for a job in the health sector. In the same period 2,065 health vacancies were being advertised at Jobcentres⁸ throughout the South East.

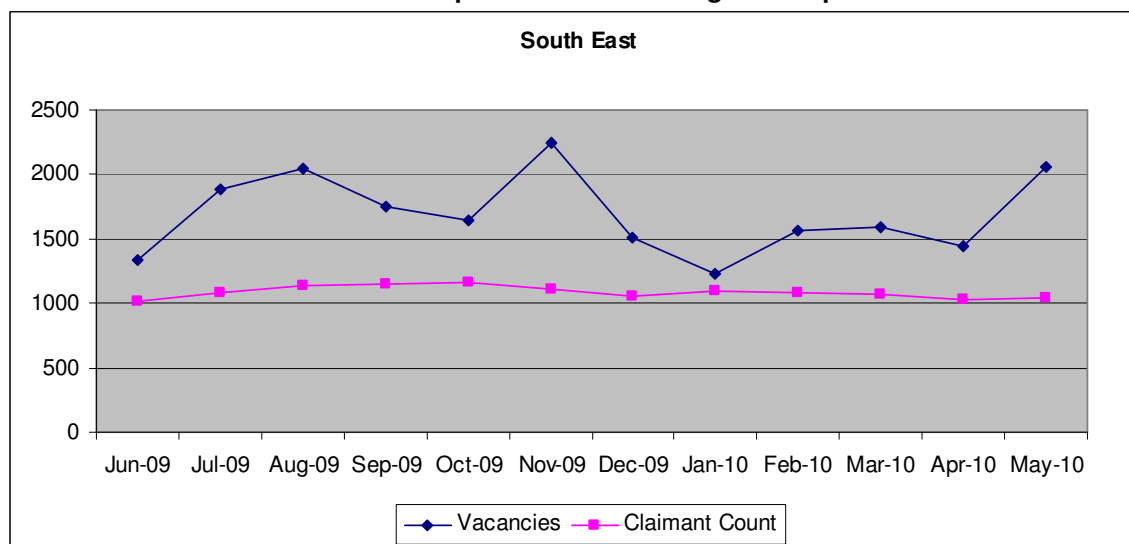
Local Authorities where vacancies greatly exceed numbers of jobseekers are East Sussex, Hampshire, Kent, Oxfordshire, Surrey and West Sussex. Please refer to the Table in Appendix 3.

Occupations where the number of vacancies advertised exceeds those being sought by registered job seekers are Nurses and Dental Nurses. However, this is not a true reflection of the labour market as sought occupation figures only account for those currently registered as unemployed and does not take into account people who are in current employment in other sectors seeking entry into the health sector. Please refer to the Table in Appendix 3.

⁸ All adverts for vacancies with an Agenda for Change salary band of 1-5 (inclusive) are fed directly to Jobcentre Plus. From February 2009 NHS Jobs updated the vacancy feed to Jobcentre Plus advisers to additionally include All Administrative and Clerical vacancies in pay bands 6 and 7 and all Estates and Ancillary vacancies in pay bands 6 and 7. www.nhsemployers.org/RecruitmentAndRetention/nhs-jobs/Pages/NHS-Jobs-and-Jobcentre-Plus.aspx

Chart 4 shows the number of Job Seekers looking for employment within the health sector has remained constant, but fewer than the number of vacancies.

4 Jobcentre Plus Vacancies Compared to Health Sought Occupations



Source: Nomis

7.5 Skills Supply

Key to the supply of skills across any sector is high quality training and development led by employer demand. If this is achieved there should be a greater balance between the demand and supply of skills. NESS 2009 shows that the health sector experiences high levels of training compared to the whole economy. Table 23 shows that 84% of health sector establishments in the South East report that they have provided training for their employees in the preceding 12 months compared to 70% in the local economy.

23. Establishments Providing Training by Region

Region	% of establishments that have provided training (on or off the job) in the preceding 12 months	
	Health Sector	Whole Economy
East of England	89	66
East Midlands	88	67
London	82	66
North East	91	69
North West	87	67
South East	84	70
South West	83	71
West Midlands	82	68
Yorkshire and the Humber	85	65
England Average	85	68

Source: NESS, 2009 Base: All establishments

7.6 Training in the Last 13 Weeks

There is also a general pattern across all sectors that more highly qualified staff receive more training than those with lower level qualifications. This pattern is seen across the health sector with Table 24 showing that those individuals qualified to NVQ Level 4 and above (44%) are almost twice as likely to report having received training in the last 13 weeks as those qualified to below NVQ Level 2 (31%).

Estimates at a regional level should be interpreted with caution due to sample sizes.

24. Percentage of the Health Sector Workforce That Have Received Training in the Last 13 Weeks Split by Qualification Level

	South East %	England %
NVQ Level 4 and above	44	45
NVQ Level 3	35	33
NVQ Level 2	34	31
Below NVQ Level 2	31	25
Other qualifications	28	29
No qualifications	14	14

Source: Labour Force Survey 2009 4 Quarter Average

These figures can be broken down further to look at specific staff groups. In doing this we have taken the largest 25 staff groups across England from the Labour Force Survey 2009 and separated the staff groups into the following:

- those with a high qualification profile (where 75% of the people in the staff group are qualified to NVQ Level 4 and above)
- those with a low qualification profile (where at least 35% of the workforce are qualified to below NVQ Level 2)
- those with a mixed qualification profile

Table 25 shows the estimated percentage of the workforce in each staff group that have received training in the last 13 weeks. In general we can see that those with the highest qualification receive more training and those in clinical roles receive more training than those in non-clinical roles. This is not surprising given the regulatory requirements of clinical roles and the need for clinical skills to be maintained.

25. Percentage of the Workforce in Each Staff Group That Have Received Training in the Last 13 Weeks

	South East %	England %
3212 Midwives	42	50
2215 Dental practitioners	41	48
2211 Medical practitioners	56	52
3222 Occupational therapists	41	51
3211 Nurses	44	47
3221 Physiotherapists	51	46
2112 Bio scientists and biochemists	44	44
2212 Psychologists	36	40
3214 Medical radiographers	44	46
1181 Hospital and health service managers	47	43
3229 Therapists n.e.c.	30	40
6113 Dental Nurses		
6113 Dental Nurses	45	43
1183 Healthcare practice managers	45	31
6115 Care assistants and home carers	44	38
6111 Nursing auxiliaries and assistants	45	38
3218 Medical and dental technicians	36	41
6112 Ambulance staff (excluding paramedics)	38	32
4211 Medical secretaries	19	19
4131 Filing & other records assists & clerks	28	16
4215 Personal assists and other secretaries	23	26
4216 Receptionists	19	20
4150 General office assistants or clerks	11	20
9233 Cleaners domestics		
9233 Cleaners domestics	8	12
9223 Kitchen and catering assistants	37	16
9221 Hospital porters	8	15

Source: Labour Force Survey 2009 4 Quarter Average

8 Projections of Future Levels of Employment in the Health Sector

Key Features

- The health sector across the South East is predicted to grow by 43,000 people between 2007 and 2017. These estimates were created prior to the economic downturn and tighter public spending and should therefore be treated with extreme caution
- 121,000 people are predicted to retire from the sector between 2007 and 2017, this represents an opportunity for employers to reshape their workforce

8.1 Introduction

Working Futures III 2007-2017⁹ is an econometric forecast of changes to employment and skills needs between 2007 and 2017. It seeks to model the impact of technological change, changes in government policy, economic conditions and other social drivers for the UK labour market, including the health sector.

These forecasts for future employment in the sector were produced prior to the recession which began in 2008. The effect of this and tighter public spending will almost certainly mean that these forecasts of expansion are now overstated. Set against a backdrop of tighter public spending, and the dominance in terms of employee numbers of the NHS across the sector, it is unlikely that the sector will experience any significant growth over the short to medium term.

The forecasts do however provide an interesting analysis of estimated numbers of workers that will retire between 2007 and 2017. These figures indicate that an average of 12,100 employees will leave the sector every year across the region. Employers may therefore wish to examine what opportunities this presents for them to reshape their workforce through systematic workforce and succession planning activities.

⁹ Working Futures 2007-2017, Institute for Employment Research, University of Warwick, December 2008

8.2 Changes in the Workforce by Main Occupational Group

The health sector across the South East is predicted to grow by 43,000 people (14.0%) between 2007 and 2017; this is higher than the 11.8% growth predicted for the health sector across England. However the region and its employers will need to recruit an additional 164,000 people between 2007 and 2017 to fill new jobs and replace existing workers who will retire or leave the sector.

Table 26 provides an overview of the expansion and net requirement for workers across the sector by occupation groups. The largest expansion in absolute numbers of workers is predicted in the Caring Personal Services occupations which includes nursing auxiliaries, nursery nurses etc. This group is predicted to increase by over 15,000 people which equates to approximately 20% growth. The largest expansion in percentage terms is found within the Corporate/Senior Manager occupations at almost 37%. Again there should be caution here given the timing of the projections and the tighter fiscal environment across the sector.

26. Changes in the Workforce across the Sector by Main Occupation Group 2007 - 2017

	2007 (000s)	2017 (000s)	Estimated Growth 2007-2017 (000s)	Estimated Retirements 2007-2017 (000s)	Net Requirement* 2007-2017 (000s)
Corporate/Senior Managers	37	50	13	14	27
Health Associate Professionals (inc nurses, therapists, midwives etc.)	68	76	8	28	36
Caring Personal Services Occupations (inc nursing auxiliaries, nursery nurses etc.)	75	90	15	30	45
Health Professionals (inc medical and dental practitioners, pharmacists, psychologists etc.)	15	16	1	6	7
Science/Technical Professionals (inc Chemists Biomedical scientists, etc.)	6	8	2	2	4
Teaching and Research Professionals (inc special needs teachers, primary and nursery education teachers)	4	6	1	2	3
Business/Public Service Professionals (inc social workers, accountants etc.)	19	24	5	7	12
Administrative Occupations (inc admin officers, wages clerk, filing and records clerk, office assistants etc.)	18	16	-3	8	5
Secretarial (inc medical secretaries, personal assistants, receptionists)	9	6	-3	4	1
All Other Occupations	54	57	2	20	23
Total Workforce	305	347	43	121	164

Source: Working Futures III

9 Conclusion

This regional briefing has sought to provide readers with an overview of the main employment and skills trends in the South East health sector. We hope this regional briefing has been of use to you and has provided you with the insights you need.

The development of Skills and Labour Market intelligence is always an iterative process and we welcome the comments and suggestions of health sector employers and stakeholders. Please email LMI@skillsforhealth.org.uk should you wish to comment on these assessments or any other aspects of our work.

9.1 Skills and Labour Market Intelligence

Skills for Health believe that robust and reliable labour market intelligence is a vital part of the workforce planning and skills development process. We want to assist you in understanding the local, regional and national picture of skills and labour market trends and give you the confidence to make informed decisions.

We seek to enhance the understanding of current and future skills needs across the sector through a varied range of outputs that are freely available on our website.

Our products and services are suitable for a wide range of users including healthcare employers and line managers, strategic health authorities, education commissioners and careers advisors. They include:

- [Baseline Reports](#) profiling health sector skills and labour market trends within the UK, England, Scotland, Wales and Northern Ireland, and the English regions
- [Themed research](#) to address gaps in workforce knowledge and promote new ways of delivering healthcare
- [An online information tool](#) allowing you to interrogate statistics on health sector employment, skills, labour demand, training and demographics
- [Future-orientate reports](#) and seminars exploring creative approaches to the emerging healthcare workforce issues
- Bespoke searches and reports on specific themes relevant to you as an employer.

10 Appendix 1 – Health Profile

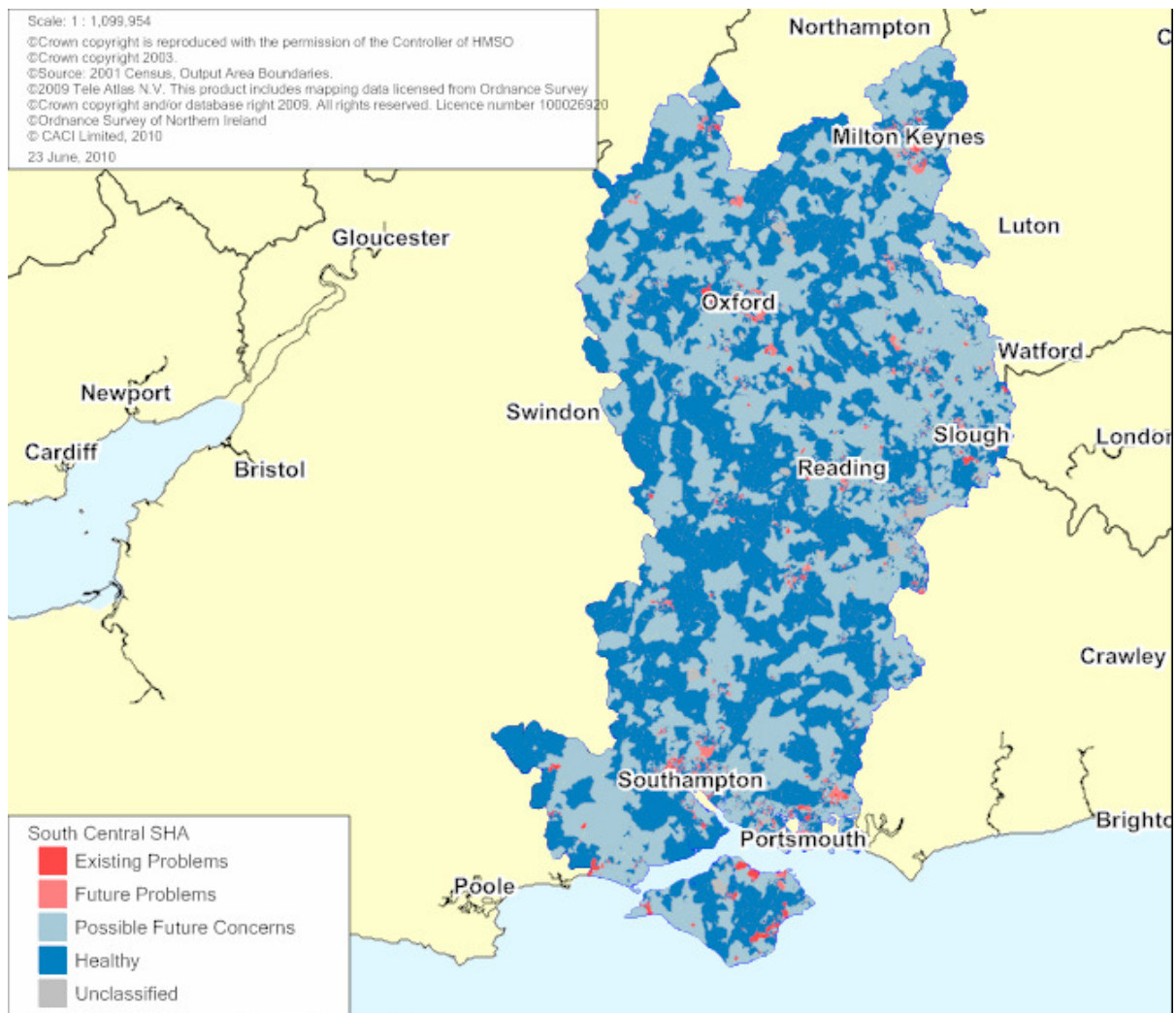
10.1 South East 2009 Health Acorn Population Profile

<i>Health ACORN Group Profile</i>	Profile	Data as % South East	Data as % England	Index avg = 100
1 Existing Problems	621,645	7.4	13.5	55
2 Future Problems	578,585	6.9	12.0	57
3 Possible Future Concerns	3,715,326	44.0	35.0	126
4 Healthy	3,401,885	40.3	38.5	105
Unclassified	119,344	1.4	0.9	153
Total Population:	8,436,785	100.0	100.0	100

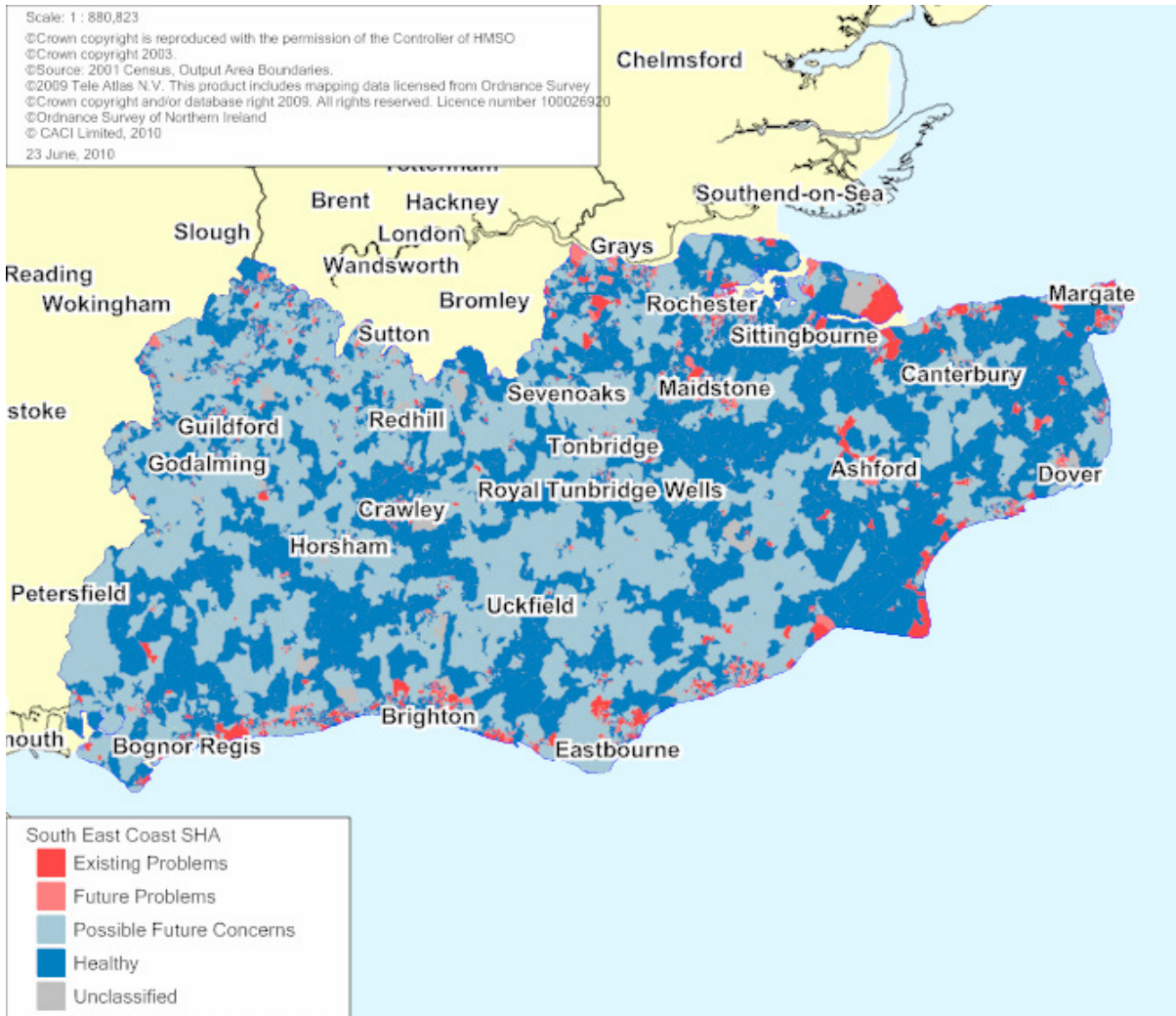
<i>Health ACORN Type Profile</i>	Profile	South East	England	Index
1 Older couples, traditional diets, cardiac issues	26,526	0.3	0.4	74
2 Disadvantaged elderly, poor diet, chronic health	5,544	0.1	0.3	22
3 Vulnerable disadvantaged, smokers with high levels of obesity	2,384	0.0	0.6	5
4 Post industrial pensioners with long term illness	42,947	0.5	1.7	31
5 Deprived neighbourhoods with poor diet, smokers	26,779	0.3	1.7	18
6 Elderly with associated health issues	152,500	1.8	2.7	68
7 Home owning pensioners, traditional diets	223,449	2.6	2.2	120
8 Disadvantaged neighbourhoods with poor diet & severe health issues	141,516	1.7	3.9	43
9 Poor single parent families with lifestyle related illnesses	21,818	0.3	0.8	34
10 Multi-ethnic, high smoking, high fast food consumption	116,493	1.4	1.9	73
11 Urban estates with sedentary lifestyle & low fruit & veg consumption	47,537	0.6	2.6	21
12 Deprived multi-ethnic estates, smokers and overweight	195,962	2.3	4.0	58
13 Disadvantaged multi-ethnic younger adults, high levels of smoking	196,775	2.3	2.7	85
14 Less affluent neighbourhoods, high fast food, sedentary lifestyles	294,500	3.5	4.9	72
15 Affluent healthy pensioners dining out	506,574	6.0	3.8	160
16 Home owning older couples, high levels of fat & confectionery	598,073	7.1	7.4	95
17 Affluent professionals, high alcohol consumption, dining out	1,302,018	15.4	8.5	182
18 Low income families with some smokers	421,929	5.0	6.3	80
19 Affluent families with some dietary concerns	592,232	7.0	4.2	165
20 Young mobile population with good health and diet	392,766	4.7	4.3	109
21 Younger affluent, healthy professionals	531,193	6.3	5.0	127
22 Students and young professionals, living well	189,599	2.2	2.0	115
23 Towns and villages with average health and diet	632,589	7.5	8.1	92
24 Mixed communities with better than average health	519,703	6.2	7.8	79
25 Affluent towns and villages with excellent health and diet	1,136,035	13.5	11.4	118
Unclassified	119,344	1.4	0.9	153
Total Population:	8,436,785	100.0	100.0	100

10.2 South Central SHA Dominant Health Group Map

Dominant health group at output area (OA)



10.3 South East Coast SHA Dominant Health Group Map



Source: CACI 2009

11 Appendix 2 – Local Ratio of Health Employees and Establishments

11.1 South East Ratio of Health Employees and Establishments

Within the South East there is 1 health employee for every 35 people and 1 healthcare establishment for every 1,048 people.

At a subregional level this figure can range from 1 health establishment to every 642 people in Brighton and Hove to 1 health establishment to every 1,591 people in Wokingham.

At a patient care level this ratio ranges from 1 health employee to every 18 people in Portsmouth to 1 health employee for every 109 people in West Berkshire.

	Population		Ratio of 1 Health Data Unit to Resident Population	Ratio of 1 Health Employee to Resident Population
	Mid Year 2008 Estimates	%		
Bracknell Forest	114,700	1	1,147	52
Brighton and Hove	256,600	3	642	27
Buckinghamshire	493,300	6	987	40
East Sussex	509,900	6	850	32
Hampshire	1,285,900	15	1,169	51
Isle of Wight	140,200	2	1,402	36
Kent	1,406,600	17	1,082	38
Medway	253,500	3	1,268	36
Milton Keynes	232,200	3	1,161	35
Oxfordshire	639,800	8	1,066	28
Portsmouth	200,000	2	1,000	18
Reading	145,700	2	1,457	19
Slough	121,200	1	1,212	27
Southampton	234,600	3	1,173	20
Surrey	1,109,700	13	925	31
West Berkshire	152,800	2	1,528	109
West Sussex	781,500	9	977	38
Windsor and Maidenhead	142,800	2	714	49
Wokingham	159,100	2	1,591	99
South East Total	8,380,100		1,048	35

Source: Annual Business Inquiry 2008 (SIC 2007)

12 Appendix 3 – Health Vacancies and Claimant Count

12.1 Jobcentre Plus Vacancies and Claimant Count by Occupations, May 2010

Occupation	Jobcentre Plus Vacancies	Claimant Count - Sought Occupation
1181 : Hospital and health service managers	14	35
1182 : Pharmacy managers	4	5
1183 : Healthcare practice managers	15	10
2112 : Biological scientists and biochemists	24	120
2211 : Medical practitioners	19	10
2212 : Psychologists	3	30
2213 : Pharmacists/pharmacologists	49	15
2214 : Ophthalmic opticians	2	5
2215 : Dental practitioners	7	5
3211 : Nurses	1,288	115
3212 : Midwives	2	0
3213 : Paramedics	5	5
3214 : Medical radiographers	14	0
3215 : Chiropodists	5	5
3216 : Dispensing opticians	0	5
3217 : Pharmaceutical dispensers	96	40
3218 : Medical and dental technicians	18	20
3221 : Physiotherapists	9	15
3222 : Occupational therapists	38	10
3223 : Speech and language therapists	4	10
3229 : Therapists n.e.c.	19	120
4211 : Medical secretaries	58	40
8138 : Routine laboratory testers	3	20
6111 : Nursing auxiliaries and assistants	221	175
6112 : Ambulance staff (excluding paramedics)	4	35
6113 : Dental nurses	123	30
9221 : Hospital porters	21	160
Column Total	2,065	1,045

Data based on 27 defined occupations. Vacancies - a monthly count of vacancies notified to employment service job centres. Claimant Count – number of people claiming JSA and NI credits at Jobcentre plus local offices. This is not an official measure of unemployment.

Claimant Count rounded to nearest 5

Source: Nomis

12.2 Jobcentre Plus Vacancies and Claimant Count by Local Authority, May 2010

Local Authority: county/unitary	Jobcentre Plus Vacancies	Claimant Count
Bracknell Forest	19	10
Brighton and Hove	71	70
Buckinghamshire	114	50
East Sussex	176	80
Hampshire	212	100
Isle of Wight	36	20
Kent	338	180
Medway	60	45
Milton Keynes	71	40
Oxfordshire	168	85
Portsmouth	46	25
Reading	62	30
Slough	32	20
Southampton	75	25
Surrey	299	120
West Berkshire	32	20
West Sussex	200	95
Windsor and Maidenhead	27	15
Wokingham	27	15
Column Total	2,065	1,045

Data based on 27 defined occupations. Vacancies - a monthly count of vacancies notified to employment service job centres. Claimant Count – number of people claiming JSA and NI credits at Jobcentre plus local offices. This is not an official measure of unemployment.

Claimant Count rounded to nearest 5

Source: Nomis

13 Appendix 4 – Regional Matrix

Description	East of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and The Humber
Tbl 1 - Health Profile (% of population)									
Existing Problems	10	14	8	30	20	7	10	17	18
Future Problems	8	13	18	16	14	7	7	14	15
Possible Future Concerns	38	33	30	29	34	44	38	35	30
Healthy	44	40	44	25	31	40	44	34	37
Unclassified	1	1	1	1	1	1	1	1	1
Population Projections 2008 - 2033 (millions)	1.4	0.9	1.5	0.3	0.6	1.7	1.1	0.7	1.1
Tbl 12 - Sizeband (% of Health Establishments)									
1 -10 employees	66	63	76	60	67	66	60	67	65
11 - 49 employees	28	29	18	30	25	26	32	26	28
50 - 199 employees	4	5	4	5	5	5	6	5	5
200 or more employees	2	3	1	<5	2	1	2	2	3
Tbl 13 - Sub Sector Activity Establishments									
Hospital activities	13	11	11	15	13	16	19	12	13
General medical practice activities	32	32	37	30	33	29	30	35	35
Specialist medical practice activities	2	3	4	<5	3	3	2	2	3
Dental practice activities	21	18	22	20	21	21	21	21	20
Other human health activities	30	37	28	30	31	30	28	30	28
% employed in the Independent Sector	24	22	29	19	18	28	24	20	22
Tbl 16 - Health Employment (%)									
Male Full Time	15	15	20	16	16	16	14	16	15
Male Part Time	4	4	4	4	4	5	5	4	4
Female Full Time	41	41	49	43	42	40	38	42	40
Female Part Time	39	39	27	38	38	39	43	39	40
Tbl 18 - Highest Qualification Held									
NVQ Level 4 and above	57	57	65	60	59	62	58	60	57
NVQ Level 3	9	12	7	13	12	10	13	11	12
NVQ Level 2	12	16	9	13	12	12	12	14	14
Below NVQ Level 2	11	8	5	8	8	8	9	8	9
Other Qualifications	8	5	10	5	5	6	5	4	5
No qualifications	4	3	4	1	4	2	2	3	3
Tbl 24 - % Training in last 13 weeks									
NVQ Level 4 and above	48	44	45	47	43	44	42	46	47
NVQ Level 3	31	29	35	33	36	35	31	26	36
NVQ Level 2	31	31	30	34	31	34	22	34	34
Below NVQ Level 2	19	26	32	16	26	31	26	18	23
Other Qualifications	28	30	34	34	33	28	23	23	25
No qualifications	13	5	17	0	22	14	14	16	7
Tbl 26 - Replacement Demand (000s)									
Estimated Growth	26	18	36	6	25	43	23	29	19
Estimated Retirements	77	60	110	40	107	121	82	79	78

14 Glossary

ABI The Annual Business Inquiry is a business survey which collects both employment and financial information. The ABI is based on a sample survey so estimates are subject to sampling errors which need to be taken into account when interpreting the data

ACORN A Classification of Residential Neighbourhoods. A geodemographic classification using census and other data to classify postcodes into neighbourhood categories. The classification has been developed by the marketing-data firm CACI

Footprint All organisations in the health sector use Standard Industrial Classifications (SIC) Human Health Activities

In analysing data for the Skills for Health footprint SIC codes are used. The most recent SIC codes that have been developed are SIC 2007

The codes relevant to the Skills for Health Footprint are SIC code 86 – Human Health Activities which is comprised of the following areas:

- SIC 86.101 – Hospital activities
- SIC 86.210 – General medical practice activities
- SIC 86.220 – Specialist medical practice activities
- SIC 86.230 – Dental practice activities
- SIC 86.900 – Other human health activities

Change in Data

The SIC 2003 classification included Nursing Home Activities (excluding homes for the aged) SIC 85.113 within Hospital Activities. This has always been an area where we have known there to be significant overlap with Skills for Care and Development in respect of responsibility for the workforce however it has never been possible to disaggregate this section of the workforce within the data that we hold.

The SIC 2007 classification now splits this sub classification into Medical Nursing Home Activities under the direct supervision of medical doctors (which falls within the skills for health footprint) and several other sub classifications which now clearly fall within the footprint of Skills for Care and Development.

The net result of this split is that it appears that our overall workforce numbers across the health sector have reduced when comparing to earlier documents but in fact this is not the case.

For a full overview of this issue please refer to the Skills for Health SIC 2007 Technical Paper which is available on the Skills for Health website.

GOR The nine Government Office Regions are the primary statistical subdivisions of England

Great Britain Refers to the whole of England, Scotland and Wales including offshore islands. It does not include Northern Ireland, the Channel Islands or the Isle of Man

LFS The Labour Force Survey (LFS) is a quarterly sample survey of households living at private addresses in the UK

NESS National Employers Skills Survey in England

OAs Output Areas (OAs) are based on postcodes as at Census Day. The minimum OA size is 40 resident households and 100 resident persons but the recommended size was rather larger at 125 households. In total there are 165,665 OAs in England

SIC The United Kingdom Standard Industrial Classification of Economic Activities (SIC) is used to classify business establishments and other standard units by the type of economic activity in which they are. For further information please visit www.statistics.gov.uk/statbase/Product.asp?vlnk=14012

SOC Standard Occupation Classification is used to define the workforce across the whole economy

The unit group structure i.e. occupation code of the major groups, are detailed in the table below. For example occupation codes beginning with 1 i.e. 1181 Hospital and health service manager will be incorporated under major group 1- Managers and Senior Officials, 2211 Medical Practitioners will be incorporated under major group 2 - Professional Occupations

Code commencing with:	Major Group	Example of Unit Groups
1	Managers and Senior Officials	1181 Hospital and health service manager 1183 Healthcare Practice Managers
2	Professional Occupations	2211 Medical practitioners 2215 Dental practitioners
3	Associate Professional and Technical Occupations	3211 Nurses, 3212 Midwives, 3213 Paramedics
4	Administrative and Secretarial Occupations	4211 Medical secretaries
5	Skilled Trades Occupations	5434 Chefs, cooks
6	Personal Service Occupations	6111 Nursing, auxiliaries and assistants 6112 Ambulance staff (excl Paramedics)
7	Sales and Customer Service Occupations	7212 Customer care occupations
8	Process, Plant and Machine Operatives	8138 Routine laboratory testers
9	Elementary Occupations	9221 Hospital porters

UK The United Kingdom is the nation state consisting of England, Scotland, Wales and Northern Ireland

15 Data Sources

Annual Business Inquiry

www.nomisweb.co.uk

CACI

CACI offer an unrivalled range of marketing solutions and information systems to local and central government and to businesses from most industry sectors.

www.caci.co.uk

Department of Health

www.dh.gov.uk

Labour Force Survey

The Labour Force Survey (LFS) is a quarterly sample survey of households living at private addresses in the UK. Its purpose is to provide information on the UK labour market that can then be used to develop, manage, evaluate and report on labour market policies.

www.statistics.gov.uk/STATBASE/Source.asp?vlnk=358&More=Y

NOMIS

Official labour market statistics

www.nomisweb.co.uk

Office for National Statistics

The Office for National Statistics (ONS) is the UK Government's main survey organisation and its main producer of official statistics.

www.statistics.gov.uk

Working Futures 2007 - 2017

Working Futures 2007-2017 is the latest in a long series of projections produced by IER in collaboration with Cambridge Econometrics (CE). It focuses upon the future patterns of demand for skills as measured by occupation. The results covered the National (UK) picture, as well as detailed sectoral and spatial results.

www2.warwick.ac.uk

UKCES

UK Commission for Employment and Skills - Home of National Employer Skills Survey for England.

www.ukces.org.uk