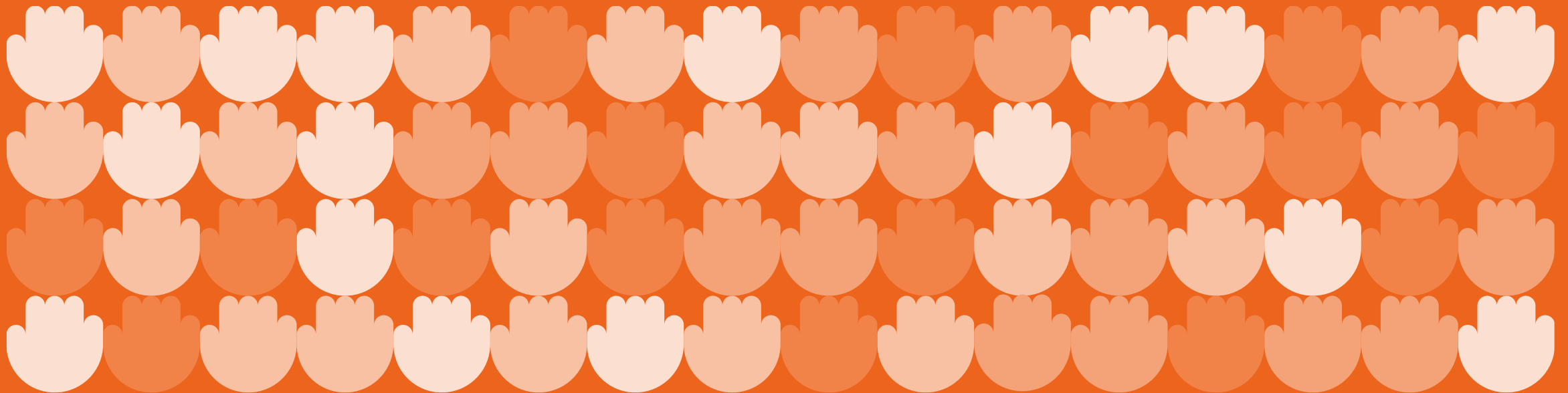


Labour Market Update

Joe Crolla – Skills Intelligence Lead - GMCA



Labour Market Headlines

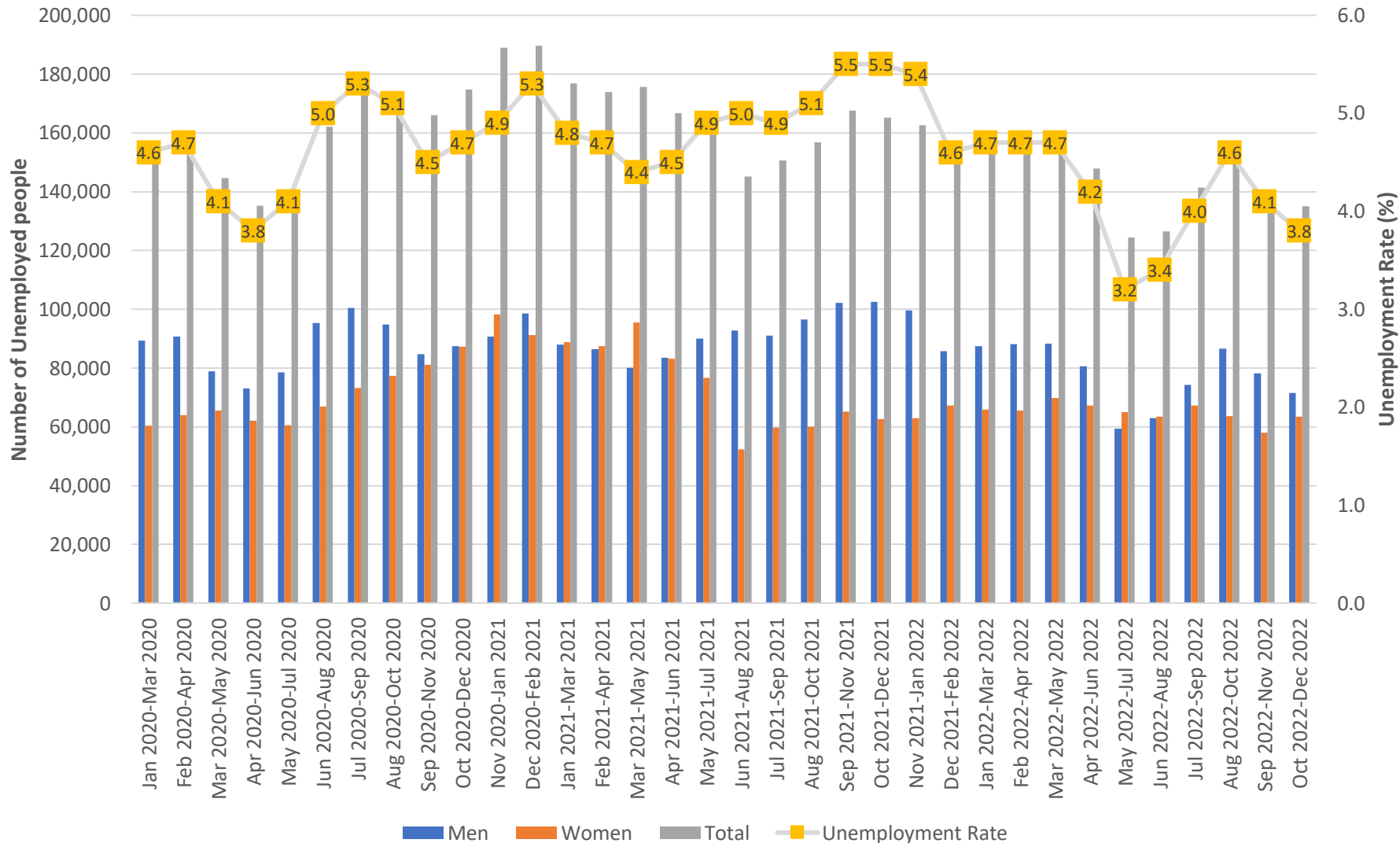
- Greater Manchester's **workforce is deep and broad**, and shares similarities with many other city regions.
- The Public Sector **employs around 1 in 3 workers in GM**, across health, education, emergency services, and local government.
- Over the course of the pandemic, **the size of GM's workforce has contracted** – GM-level data shows around 15,000 fewer people in work in the year to June 2022 (vs. June 2019).
- Different areas of the economy have seen different trends – **hospitality has lost around 50,000 workers** in the same time period, while the financial services and public sector workforce has grown.
- Unemployment remains low – the reduction in the size of the workforce has been **driven by increases in economic inactivity**.

GM Workforce Overview

Broad Sector (SIC 2007)	Workforce	Proportion
A Agriculture & fishing	3,900	0.3%
B,D,E Energy & water	12,600	1.0%
C Manufacturing	94,900	7.3%
F Construction	82,000	6.3%
G,I Distribution, hotels & restaurants	204,500	15.8%
H,J Transport & Communication	132,000	10.2%
K-N Banking finance & insurance etc.	265,600	20.6%
O-Q Public admin education & health	436,300	33.8%
R-U Other services	59,800	4.6%
Total	1,291,600	100%

Post-pandemic Unemployment

Unemployment, number and rate (16+), North West (NW), Jan-Mar 2020 – Oct-Dec 2022

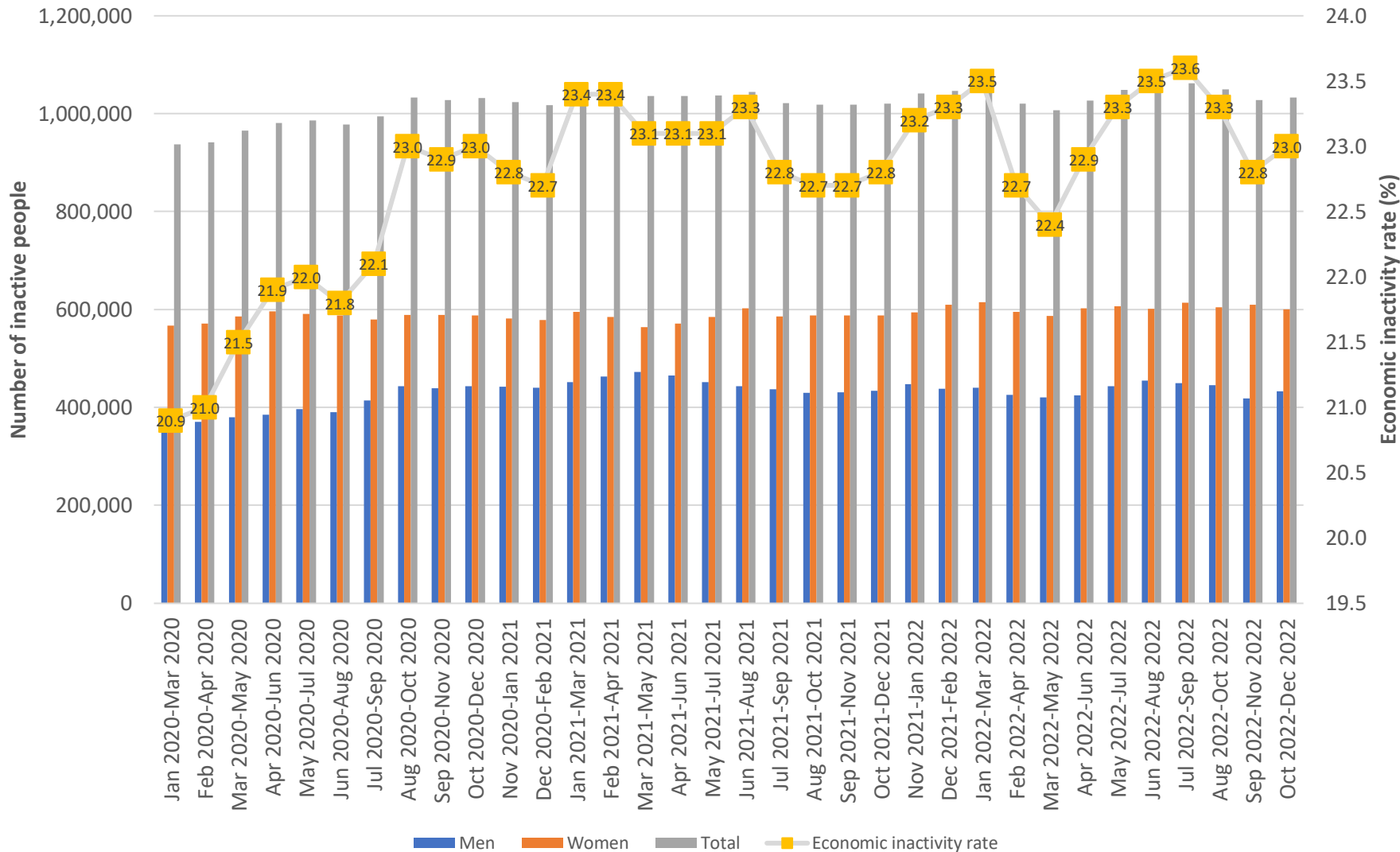


- The official unemployment rate uses data from the Labour Force Survey (LFS). The most recent data refers to the three month period to Dec 2022. The unemployment rate is the percentage of the economically active population who are seeking work and available to take it.
- The unemployment rate was 3.8% in the North West (NW) of England in the three months to December 2022. The rate was down since the previous release, referring to the three months to Nov 2022.
- This is slightly above the national unemployment rate (3.7%). Unemployment remains at very low levels
- The reduction in unemployment has been driven by two major factors – a buoyant job market post-pandemic, and an increase in economic inactivity.

Source: Labour Force Survey, ONS; seasonally adjusted

Post-pandemic Inactivity

Economic inactivity number and rate (16-64), North West (NW), Jan-Mar 2020 – Oct-Dec 2022

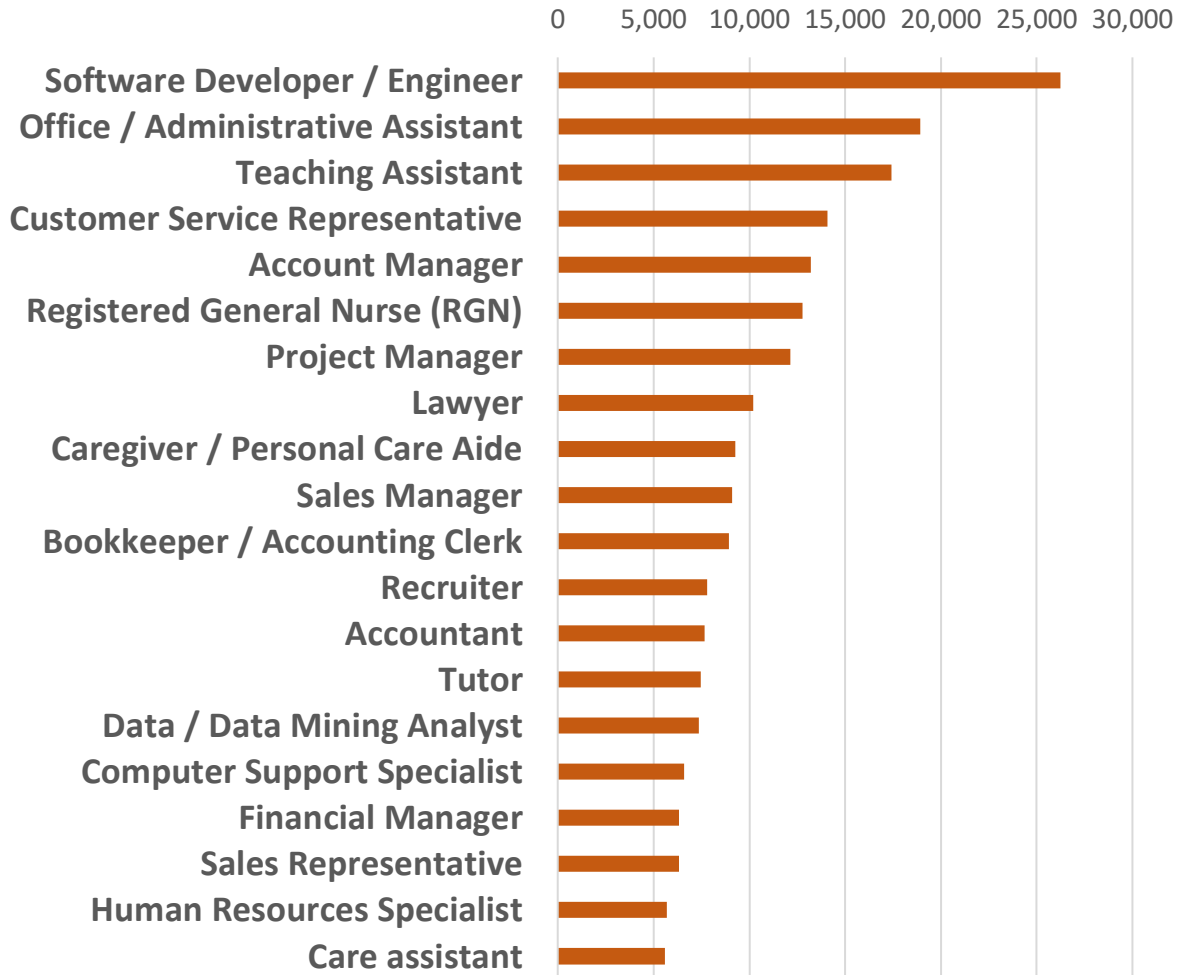


- Economic inactivity refers to people who are not participating in the labour market: they are neither working nor seeking employment.
- Total economic inactivity stood at 1,033,219 (23% of the working age population) in the NW in the three months to December 2022.
- This rate is slightly below the record rates of inactivity reached during various points of the pandemic.
- Elevated levels of inactivity have been among the primary labour market consequences of the pandemic.
- The reasons for inactivity are varied, but the high levels are being driven by long-term ill-health among lower-paid workers and early retirement among higher-paid workers

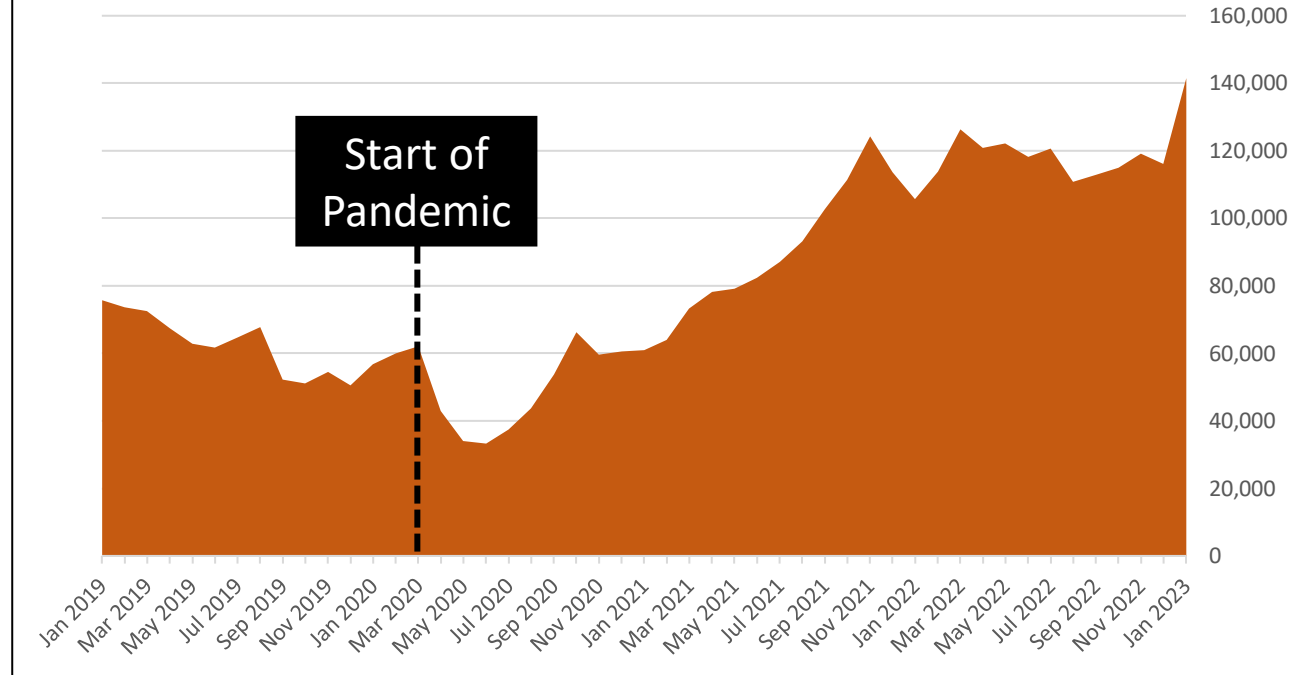
Source: Labour Force Survey, ONS; seasonally adjusted

GM Vacancy Market (last 12 months)

Unique Postings (Jan 2022 - Jan 2023)



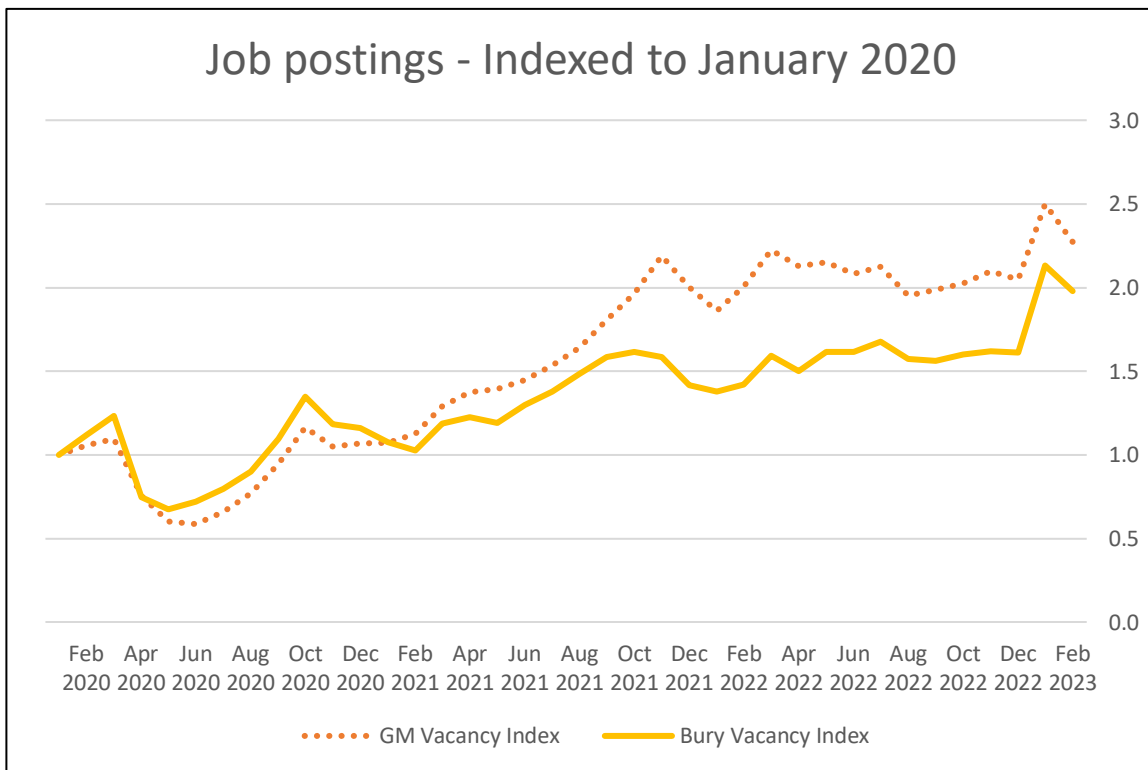
Job postings in GM - Jan 2020 - Jan 2023



- Vacancy Data shows a strong recovery of demand after the pandemic eased, after an initial dip.
- Despite flattening in mid-2022, the number of roles advertised is still double pre-pandemic levels.
- Key in-demand occupations are varied, ranging from digital, care, and sales roles.

Bury (2013 – 2023)

Growth Sector	2013 Employees	2023 Employees	% Growth
Food and Drink Manufacturing	310	1,340	332%
Automotive Services	1,010	2,500	147%
Metal Manufacturing	67	141	110%
Appliances & Personal Goods	206	425	106%
Business Services	950	1,733	82%



February saw around **3,000 job openings in Bury**, around double the February 2020 postings. Bury's job market has recovered well from the pandemic, with key occupations seeing high levels of vacancies. **Demand has been largely driven by the public sector** – roles in Education and Healthcare have led the vacancy market since the recovery. Teaching assistants, nurses, and carers are the top 3 in-demand roles. **Sales occupations feature more prominently in Bury than other regions** – both customer service and account management roles feature in the top ten

Bury Growth Sectors (2013 – 2023)

- Rapid growth in Food and Drink Manufacturing (over 1,000 workers, up 332%) over the past 10 years. Has included growth in the **local focus of more advanced food manufacturing** (ready meal preparation rather than raw materials). Employers like Cranswick and Dunsters' Farm have expanded sites in the past decade. Additionally, Bury sees a good amount of workers employed in Grain Mills.
- Growth in Appliances & Personal Goods (around 220 workers) **driven almost entirely by expansion of AO.com site** in Bury – roles include HQ-type roles in finance/sales/marketing, in addition to roles supply goods in warehousing and shipping.
- **Automotive Services employers in Bury have significantly grown**, adding 1,500 staff over the past decade. This includes some manufacturing of car components, but primarily the growth has been seen in vehicle repair and maintenance and sales.

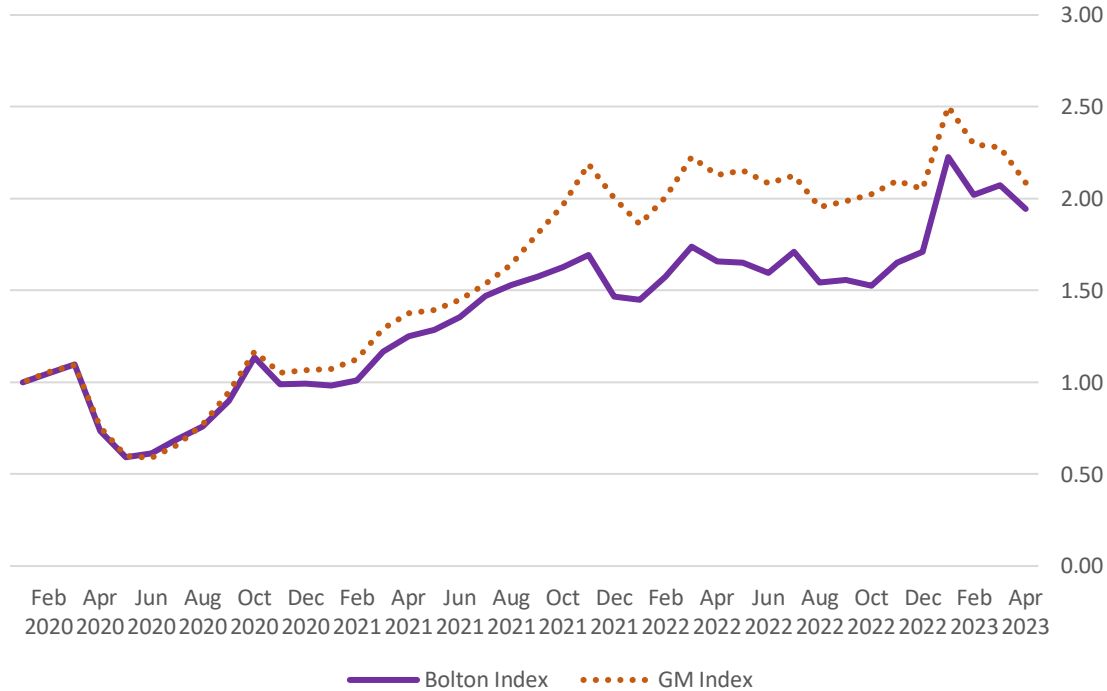
Bury Declining Sectors (2013 – 2023)

- A stark decline in utilities workers from 1,404 to 182 (-87%) is **likely explained by a large operator like Electricity North West or United Utilities moving a site out of the region**. The drop is large enough to warrant further investigation, however.
- Drops in both local transport (-56%) and civil engineering (-40%) reflect some other areas, and are likely **due to consolidation taking place in these sectors**, where transport operators and civil engineering firms have moved staff into more central locations.
- Declining employment in Sport and Leisure (-50%) is **partly explained by the winding down of Bury FC** after financial difficulties forced the club into administration in 2020.

Bolton (2013 – 2023)

Growth Sector	2013 Employees	2023 Employees	% Growth
Utilities	160	1,250	681%
Metal Manufacturing	286	591	109%
Defence Manufacturing	997	1,937	94%
Logistics and eCommerce	4,609	8,482	84%
Business Services	1,524	2,358	55%

Job Postings - Indexed to January 2020



March 2023 saw around **7,000 roles advertised in Bolton – around double vs. pre-pandemic**. As with many areas of GM, Bolton sees high demand for **foundation economy workers, with a focus on healthcare and education**. The Top 10 also includes **Business Services type roles**, with Bookkeepers (1,289 roles advertised since Jan 2020), Accountants (1,133), and Sales Representatives (1,095). **Large professional services firms like Keoghs & AXA, and Manufacturing firms like MBDA and Warburtons** recruit a lot of workers from the surrounding area.

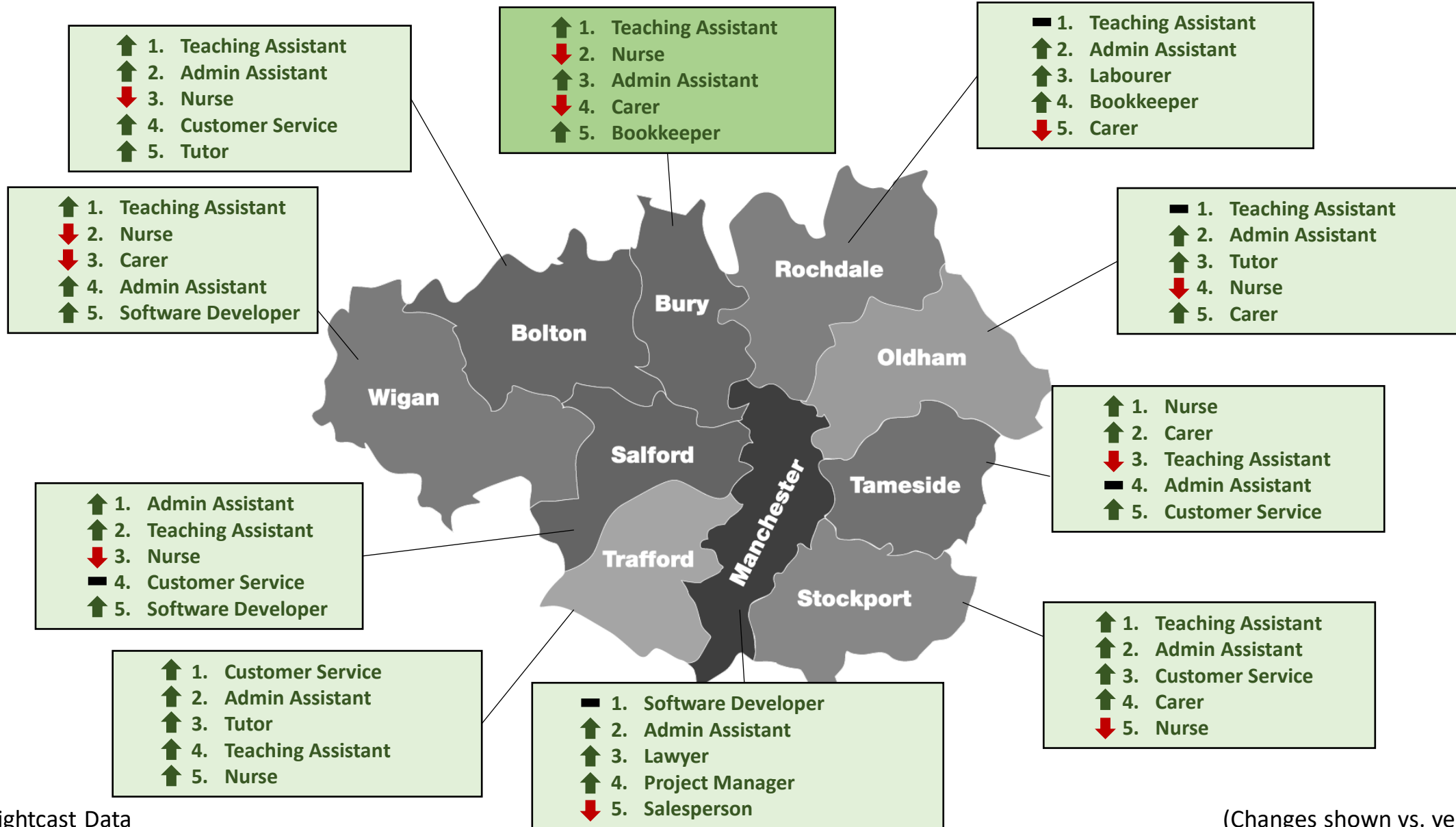
Bolton Growth Sectors (2013 – 2023)

- **Large increase in Logistics employment over the past 10 years – nearly doubling** from 4,609 to 8,482. Driven by consumer habits – increasing online shopping, reverse logistics, and retail businesses pushing into eCommerce during pandemic.
- Likely driven by a single firm (MBDA), there has been a **big expansion in high-skilled manufacturing jobs in Defence Manufacturing**. Average wages for employers in a sector like this are well above the median - £36,278 per annum.
- **A strong growth in Business Services has seen large insurance, finance, and professional services firms move to Bolton and expand** in the past 10 years. Around 800 workers were added to the sector since 2013, generally in well-paid roles

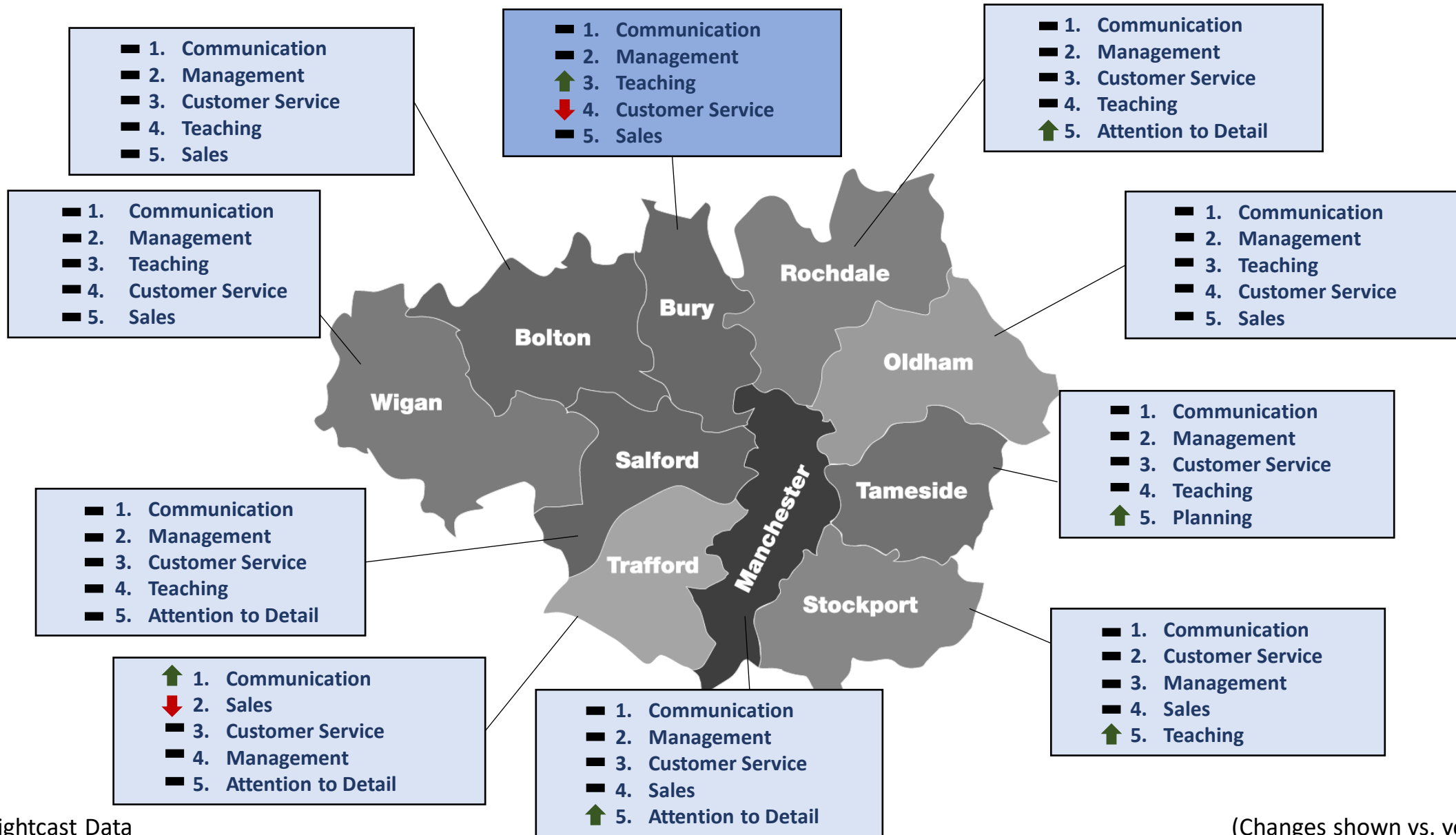
Bolton Declining Sectors (2013 – 2023)

- **Decline in tourism and visitor economy jobs (down by 34%)** over the past 10 years likely driven by changes in consumer habits (less attendance of live events). Bolton's decline is above the national decline in this sector (down 8.5%)
- Workers employed in **public sector roles have declined since 2013**. Bolton saw a **particularly stark drop in 2020** as many workers left the public sector (particularly administrative and health and social care roles) during the pandemic, and didn't return.
- General **decline in "downstream" manufacturing** – chemicals, furniture, plastics, metals, etc. as manufacturers adopted increased automation or shifted to higher value products, reducing the production jobs available by around 600-700.

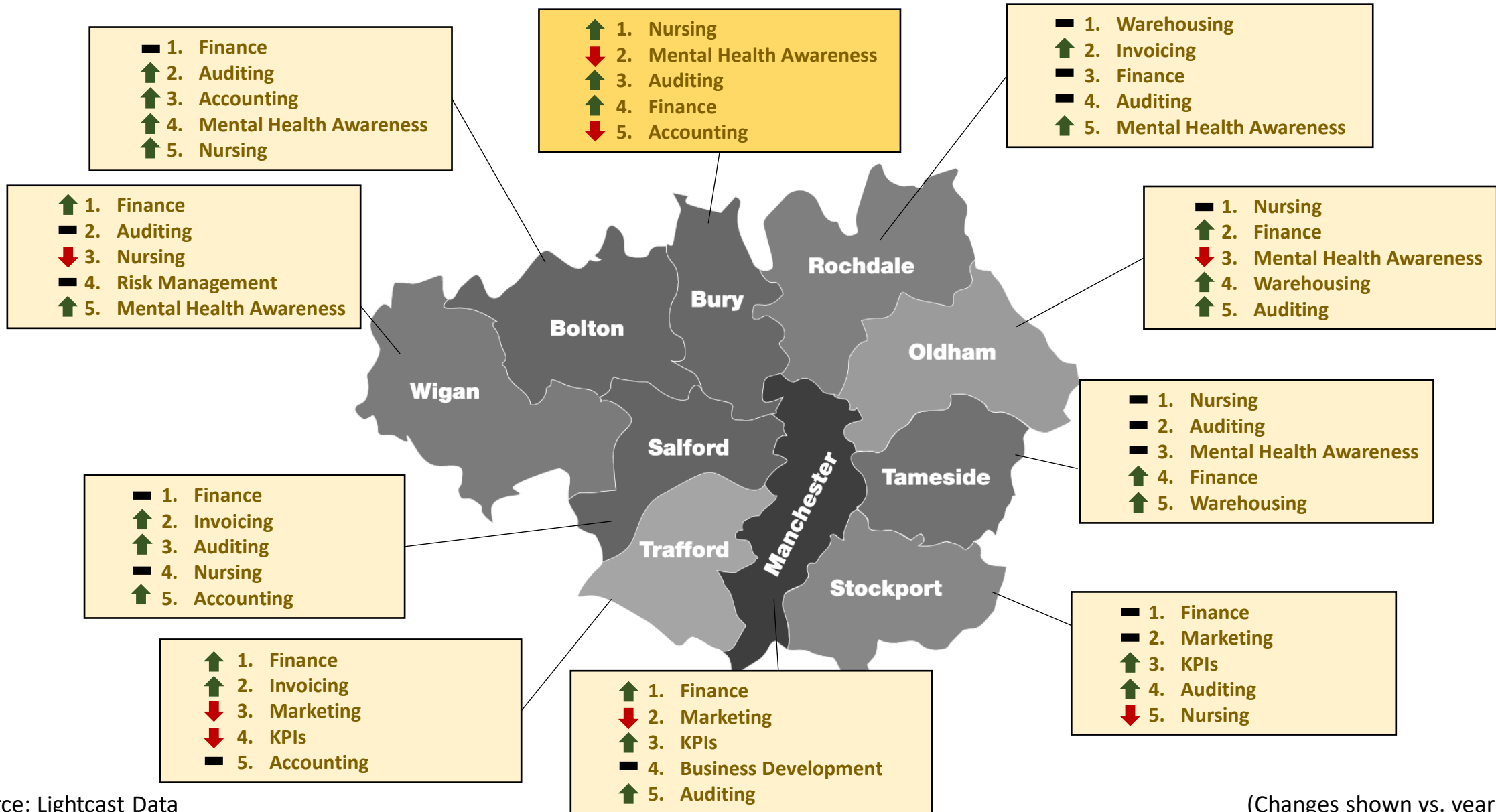
GM in-demand occupations (last 3 months)



GM in-demand common skills (last 3 months)



GM in-demand specialist skills (last 3 months)



GM Occupation Clusters (Dec 2022 – Feb 2023)

Education & Training	20,600	10%
Teaching Assistant	6,681	13%
Tutor	3,232	3%
Primary School Teacher	1,890	14%
University Lecturer	1,055	7%
Nursery nurses, assistants and playworkers	775	20%
Secondary School Teacher	747	10%
Coach	588	11%
Science Teacher	563	3%
Preschool / Childcare Teacher	482	27%
Training and Development Specialist	462	-5%

Healthcare (including Nursing)	16,721	7%
Registered General Nurse (RGN)	3,522	-6%
Care assistant	1,766	0%
Physician	1,129	20%
Nursing Assistant / Healthcare Assistant	952	-3%
Healthcare Manager	933	9%
Nurse Practitioner	734	11%
Health Technician / Technologist (Other)	546	94%
Psychologist	474	-2%
Occupational Therapist	383	-4%
Pharmacist	376	-3%

Clerical and Administrative	12,358	14%
Office / Administrative Assistant	6,801	21%
Receptionist	1,562	17%
Senior Administrator	1,020	10%
Executive Assistant	903	25%
Administration Manager	309	-6%
Legal Secretary	304	-17%
Medical Secretary	259	9%
Licensed Conveyancer	185	-50%
Bill and Account Collector	177	15%
Office Manager	170	-15%

Information Technology	20,413	2%
Software Developer / Engineer	8193	-1%
Computer Support Specialist	1898	5%
Computer Systems Engineer / Architect	1457	1%
Web Developer	1364	4%
Software QA Engineer / Tester	810	1%
Information Security Engineer / Analyst	751	12%
Systems Analyst	741	10%
Computer Programmer	700	-3%
Database Administrator	617	6%
Data Engineer	563	0%

Business Management and Operations	16,137	4%
Project Manager	3,955	7%
Labourer / Material Handler	1,743	-20%
IT Project Manager	1,064	6%
Scheduler / Operations Coordinator	942	21%
Operations Manager	903	12%
Procurement Manager	893	25%
Buyer / Purchasing Agent	872	8%
Warehouse / Inventory Associate	861	-31%
Property / Real Estate / Community Managers	622	12%
Storage / Distribution Manager	410	14%

Hospitality, Food and Tourism	10,693	-2%
General cleaner	2,231	13%
Chef	1,584	-29%
Food Service Team Member	1,478	2%
Maid / Housekeeping Staff	660	2%
Janitor / Cleaner	619	18%
Kitchen Staff	601	-11%
Bartender	572	2%
Waiter / Waitress	515	-9%
Restaurant / Food Service Supervisor	504	2%
Event Specialist	263	14%

Sales	17,768	13%
Account Manager / Representative	4,244	14%
Sales Manager	3,032	25%
Sales Representative	2,391	29%
Sales Assistant	1,804	-3%
Retail Sales Associate	1,657	-15%
Retail Store Manager / Supervisor	1,098	13%
Marketing Representative	708	16%
Real Estate Agent / Broker	640	25%
Merchandising Specialist	549	-13%
Telemarketer	298	7%

Finance	15,583	10%
Bookkeeper / Accounting Clerk	3,291	14%
Accountant	2,590	13%
Financial Manager	1,817	5%
Credit Analyst / Authoriser	1,198	14%
Auditor	748	6%
Payroll Specialist	728	-14%
Financial Analyst	592	3%
Compliance Manager	459	2%
Insurance Claims Specialist	397	8%
Personal Financial Advisors	389	10%

Engineering	10,364	22%
Civil Engineer	1,632	29%
Mechanical Engineer	1,401	19%
Quantity surveyors	1,238	18%
Electrical Engineer	951	20%
Validation Engineer	746	14%
Engineering Manager	654	4%
Land Surveyors	504	45%
Industrial Engineer	429	20%
Chartered architectural technologists and town	412	30%
Electronics Engineer	252	36%

Questions

- Is this useful?
 - How does it compare with what you hear from employers in Bury?
 - What else do we need to be considering to improve the system in GM?
-