



MANCHESTER
CITY COUNCIL

Manchester Supply & Demand Analysis

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Summary & findings: Supply & Demand

Demand:

- Most vacancies at Professional and Associate Professional level i.e. generally Level 3+
- Common Skills are the most referenced on job adverts e.g. communication, problem solving.
- IT skills are also in high demand
- The projected growth sectors for the City are:
 - Professional, Scientific and Technical 12,400 additional jobs 2013-2023 (GMFM)
 - Administrative and Support Services 8,900 additional jobs 2013-2023 (GMFM)
 - Accommodation and food services 4,300 additional jobs 2013-2023 (GMFM)

Supply 16-18:

- Manchester College still biggest provider of courses
- Loreto & Xavarian biggest L3 providers
- Strong correlation between most popular courses and growth sectors:
 - Science & Maths
 - Arts, Media & Publishing
 - Business, Administration & Law
- Increase in Advanced (L3) apprenticeship starts
- Manchester College has significantly increased the volume of apprenticeship training it provides
- Business Administration, Health & Social Care, Personal Services

Supply 19-24:

- Decline in course starts across the board
- Employability is most popular followed by Retail, Health & Social Care and Business, Administration, Financial & Professional
- Manchester College & MAES dominate 19-24 provision
- Apprentice numbers are falling, especially at Advanced (L3)
- Business Administration, Health & Social Care, Tourism & Hospitality are most popular apprenticeships
- Manchester College & Solutions are biggest providers of apprenticeships but there are many private companies

Supply 25+:

- Course starts have increased, mainly driven by a major increase in employability (Preparation For Life)
- The number of course starts recorded as N/A or other remains significant – is this community learning provision?
- Manchester College & MAES dominate adult learning provision
- Advanced (L3) apprenticeship starts have almost halved, intermediate (L2) have increased slightly – impact of learner loans?
- Health & Social Care and Business Administration still most popular apprenticeships
- A broad range of providers are delivering apprenticeship training, EQL Solutions are a major provider of Advanced (L3) training

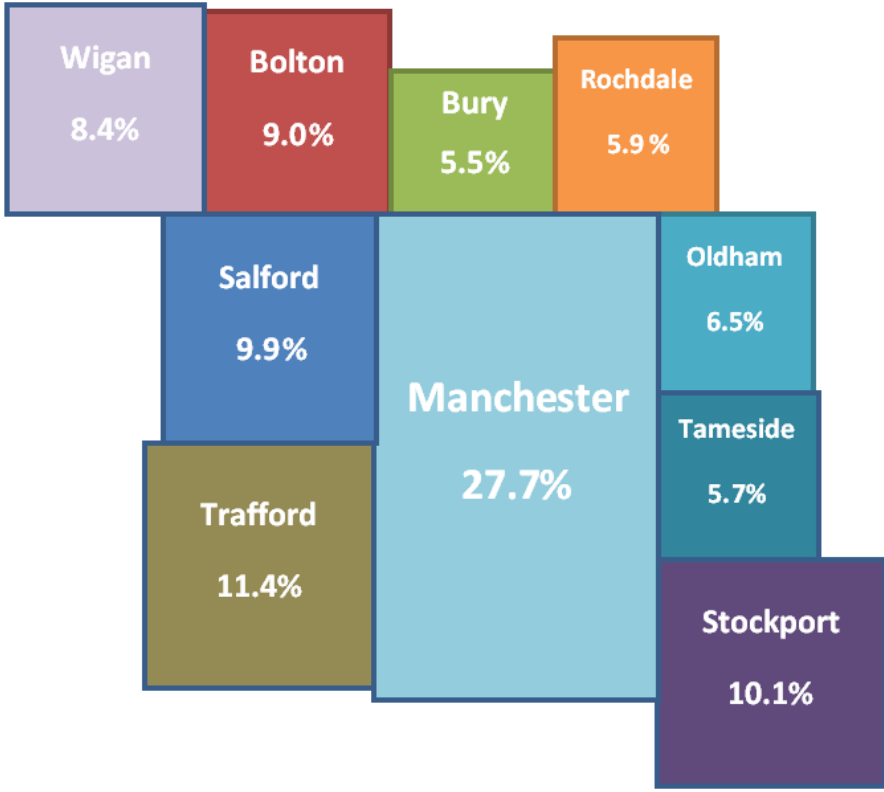
Demand

Job growth will be focussed in the core of the conurbation

- 39% of new GM jobs over the next 10 years will be created in Manchester

- Over 25% of all jobs in GM are located in Manchester

Local Authority	Jobs 2014-2024
Manchester	43,000
Salford	17,000
Trafford	13,000
Bolton	11,000
Stockport	10,000
Bury	5,000
Wigan	4,000
Oldham	4,000
Rochdale	2,000
Tameside	2,000
Total	111,000



Source: Oxford Economics, GMFM 2014

Strategic projects generating knowledge intensive jobs

- HS2/Piccadilly/Mayfield: 30,000
- Alderley Park bio-science: 30,000
- Corridor Manchester: 20,000
- NOMA: 15,000
- Airport City EZ: 10,000
- First St Development: 10,000
- Former ITV site: 5,000
- Siemens HQ: 2,750
- Etihad Campus: 500
- Space Project West Gorton: 500



Airport City

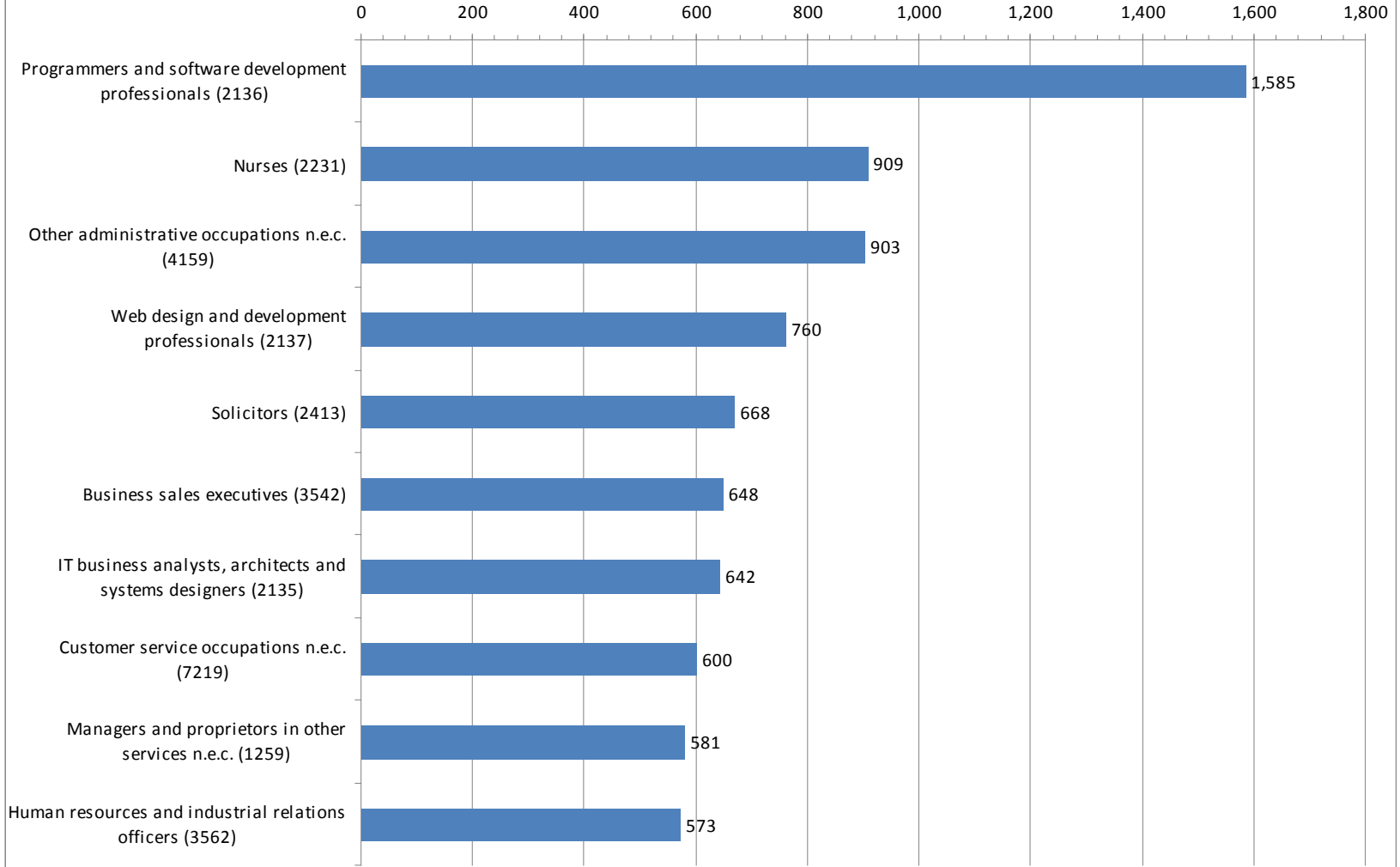
- Majority of roles will be in Financial and Professional, Business Services, Advanced Manufacturing, Creative and Digital

Snapshot of job vacancies by occupation in Manchester 1st October – 31st December 2014

Occupation Group	% of Total Jobs 1 st Oct – 31 st Dec 2013	% of Total Jobs 1 st Oct – 31 st Dec 2014	Total Number of Jobs 1 st Oct – 31 st Dec 2014
PROFESSIONAL OCCUPATIONS	30.6	36.8	10,771
ASSOCIATE PROFESSIONAL & TECHNICAL	24.3	24.2	7,082
MANAGERS, DIRECTORS & SENIOR OFFICIALS	8.0	9.0	2,644
ADMINISTRATIVE & SECRETARIAL	10.0	8.9	2,617
SALES & CUSTOMER SERVICE	8.3	6.4	1,869
ELEMENTARY	4.7	4.1	1,198
SKILLED TRADES	5.3	3.9	1,135
CARING, LEISURE & OTHER SERVICE	4.2	3.7	1,079
PROCESS, PLANT & MACHINE OPERATIVE	4.6	2.9	853

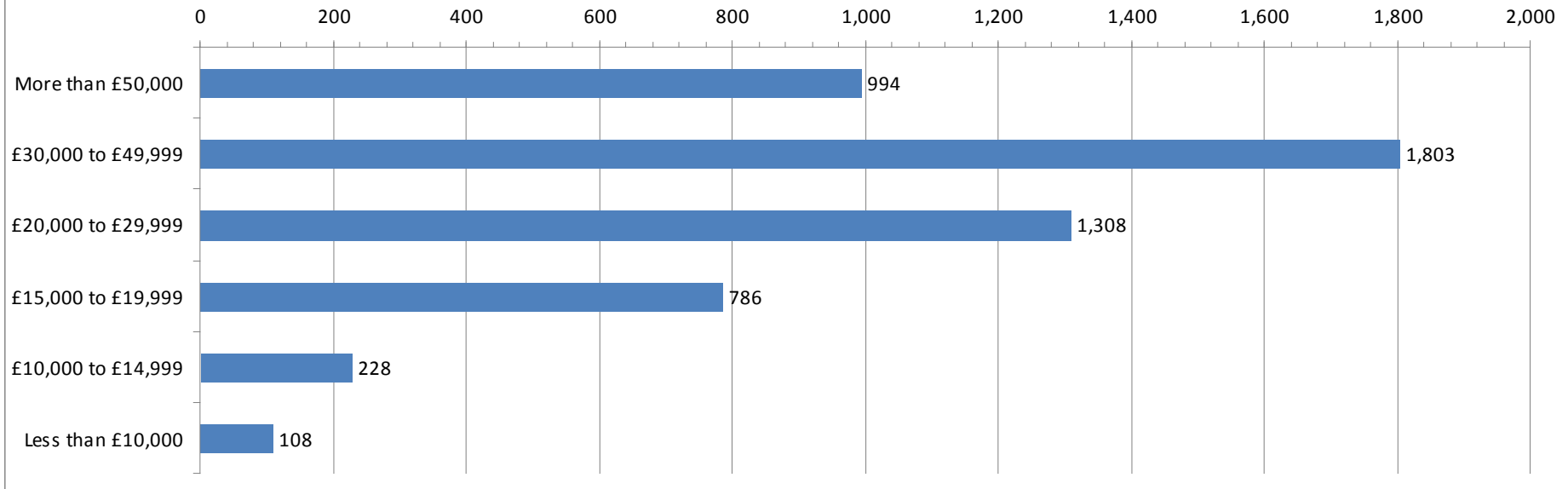
Source: Labour Insight

Top 10 detailed Manchester occupations 1st October - 31st December 2014



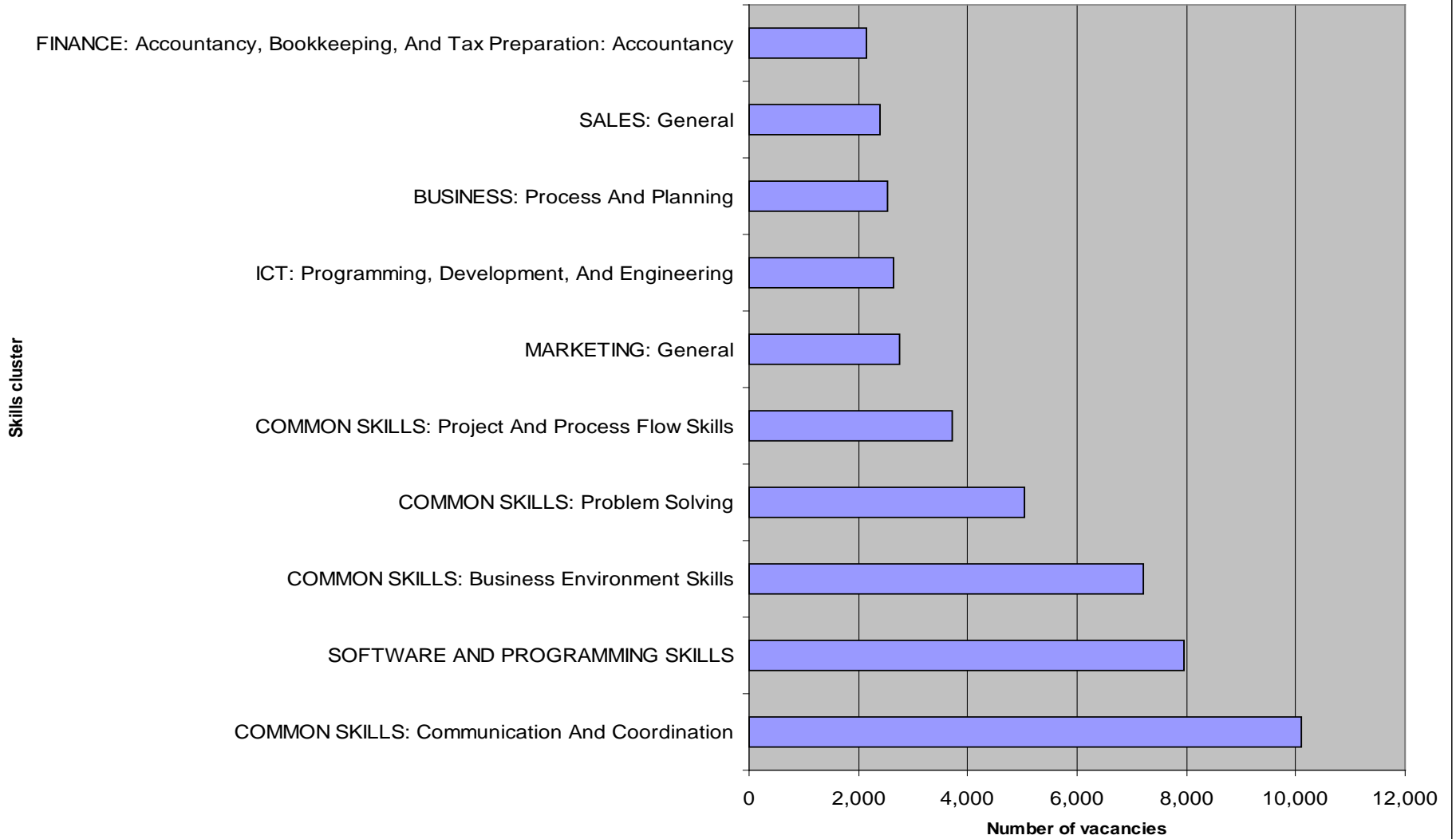
Source: Labour Insight

Distribution of advertised salary in Manchester 1st - 31st December 2014



- Mean real time salary £37,146
- Analysis only based on 8,083 vacancies as no specified salary in 2,856

Top 10 Skills clusters in Manchester 1st Oct - 31st Dec 2014



Manchester based apprenticeship vacancies fluctuate considerably

Sector	02/02/2015	07/04/2015
01 Health, Public Services and Care	38	16
03 Agriculture, Horticulture and Animal Care	1	1
04 Engineering and Manufacturing Technologies	12	7
05 Construction, Planning and the Built Environment	4	7
06 Information and Communication Technology	15	8
07 Retail and Commercial Enterprise	45	28
09 Arts, Media and Publishing	2	5
13 Education and Training	1	1
15 Business, Administration and Law	120	78
99 Traineeship	27	8
08 Leisure, Travel and Tourism	1	
Grand Total	266	159

- Data is generated via a snapshot of Manchester based apprenticeship vacancies at a given point in time
- Vacancies can remain advertised for a number of weeks so each snapshot could contain the same vacancies

Vacancy Type	02/02/2015	07/04/2015
Advanced Level Apprenticeship	50	46
Higher Apprenticeship	2	4
Intermediate Level Apprenticeship	187	101
Traineeship	27	8
Grand Total	266	159

Source: National Apprenticeship Service

Supply

Part 1:

Youth 16-18

The Manchester, Loreto & Xaverian College's remain the 3 major providers

Figure 1. Number of EFA funded course starts by Manchester residents (16-18) by provider and level 2013/14

Provider	Entry & Level 1	Level 2	Level 3	Grand Total
MANCHESTER COLLEGE, THE	6,946	2,850	1,989	11,785
LORETO COLLEGE	808	713	4,437	5,958
XAVERIAN COLLEGE	845	935	3,692	5,472
ECONOMIC SOLUTIONS LIMITED	1,009	349	3	1,361
TRAFFORD COLLEGE	392	396	523	1,311
BURY COLLEGE	278	426	456	1,160
CHEADLE AND MARPLE SIXTH FORM COLLEGE	51	365	699	1,115
STOCKPORT COLLEGE	411	382	281	1,074
SALFORD CITY COLLEGE	164	180	548	892
HOLY CROSS COLLEGE	0	19	723	742
HOPWOOD HALL COLLEGE	328	207	194	729
NCG	509	122		631
AQUINAS COLLEGE	4	30	462	496
OLDHAM SIXTH FORM COLLEGE	3	33	364	400
ASHTON SIXTH FORM COLLEGE	6	67	177	250
THE OLDHAM COLLEGE	83	81	73	237
YMCA TRAINING	169	12		181
TAMESIDE COLLEGE	54	54	58	166
KIRKLEES COLLEGE	13	22	36	71
BOLTON COLLEGE	46	6	7	59

Source: SFA 2013/14

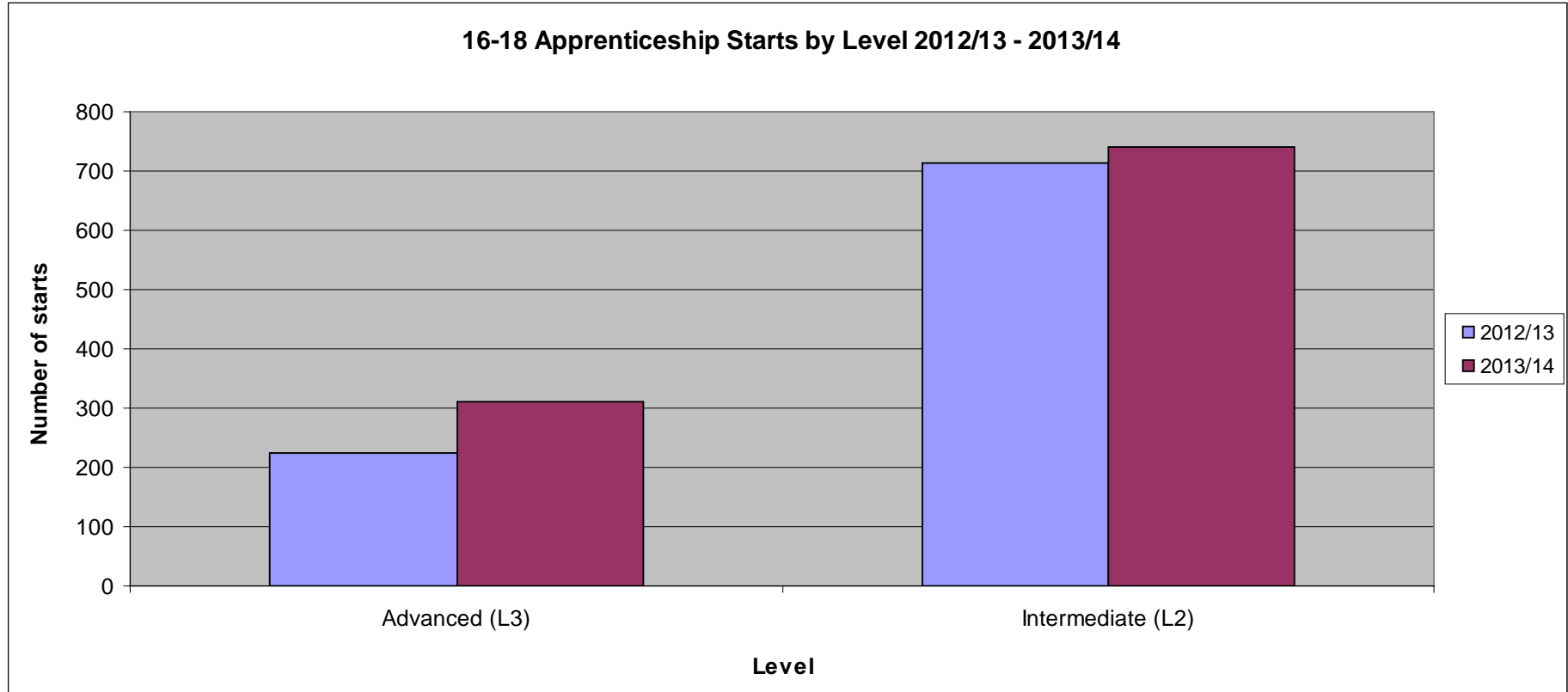
Science and maths is still the most popular L3 course by some distance

Figure 2. Number of EFA funded course starts by Manchester residents (16-18) by subject and level 2012/13 - 2013/14

Course	Entry level		Level 1		Level 2		Level 3	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
01 - Health, Public Services and Care	107	77	470	391	675	724	749	843
02 - Science and Mathematics			33	75	790	1,042	4,250	4,390
03 - Agriculture, Horticulture and Animal Care		1	51	47	53	33	61	35
04 - Engineering and Manufacturing Technologies	67	89	230	194	357	277	140	127
05 - Construction, Planning and the Built Environment	22	6	261	273	173	221	87	90
06 - Information and Communication Technology	27	9	451	91	193	167	618	585
07 - Retail and Commercial Enterprise	98	12	511	388	455	329	148	123
08 - Leisure, Travel and Tourism	32	1	431	146	580	381	580	613
09 - Arts, Media and Publishing	8	5	325	131	436	325	2,146	2,208
10 - History, Philosophy and Theology			1,571	1,334	1,150	1,067	634	719
11 - Social Sciences				1	63	36	1,199	1,340
12 - Languages, Literature and Culture	8	3	2	28	609	886	1,267	1,299
13 - Education and Training					3	7		4
14 - Preparation for Life and Work	6,235	4,548	6,844	4,466	2,605	1,537	550	655
15 - Business, Administration and Law	22	1	139	103	244	362	1,614	1,818
Grand Total	6,626	4,752	11,319	7,668	8,386	7,394	14,043	14,849

Strong growth in L3 apprenticeships for 16-18 cohort

Figure 3. Manchester resident Youth Apprenticeship (16-18) starts by level 2012/13 - 2013/14



Less private provider domination in the market – College’s increasing volumes

Figure 4. Manchester resident Youth Apprenticeship (16-18) starts by provider 2013/14

	Intermediate	Advanced	Higher	Total
ECONOMIC SOLUTIONS LIMITED	123	52	1	176
MANCHESTER COLLEGE, THE	112	25	1	138
GREATER MANCHESTER CHAMBER OF COMMERCE	16	26		42
TOTAL PEOPLE LIMITED	8	25	1	34
DAMAR LIMITED	24	9		33
MICHAEL MCCORMACK	28	5		33
ESG (SKILLS) LIMITED	22	6		28
TRAFFORD COLLEGE	15	13		28
LEARNDIRECT LIMITED	14	12		26
PARAGON EDUCATION & SKILLS LIMITED	19	3		22
BUSINESS IMPACT UK LIMITED	20			20
STOCKPORT COLLEGE	13	5		18
THE APPRENTICE ACADEMY LIMITED	11	7		18
THE OLDHAM COLLEGE	16	1		17
BURY COLLEGE	13	3		16
BABINGTON BUSINESS COLLEGE LIMITED	12	1		13
MANTRA LEARNING LIMITED	13			13
TRESHAM COLLEGE OF FURTHER AND HIGHER EDUCATION	7	6		13
XAVERIAN COLLEGE	13			13
EDUCATION & YOUTH SERVICES LIMITED	12			12

Source: SFA 2013/14

Overall numbers have risen & 'Business Administration' remains the most popular

Figure 5. Manchester resident Youth Apprenticeship (16-18) starts by sector 2013/14

	Sector	Intermediate	Advanced	Higher	Total
High growth sector	Creative	3	11	0	14
	Digital	8	37	1	46
	Education	3	13	0	16
	Financial & Professional	8	10	7	25
	Business administration	266	56	0	322
	Health & Social Care	100	86	0	186
	Manufacturing/engineering	32	35	0	67
Risk of undersupply sectors	Construction	44	12	0	56
	Retail	26	1	0	27
	Tourism & Hospitality	52	4	0	56
	Transport & storage	78	9	0	87
Other sectors	Environment	6	1	0	7
	Personal services	95	20	0	115
	Public administration	7	0	0	7
	Sport	13	12	0	25
Non sector specific	Not applicable	0	4	0	4
	Grand Total	741	311	8	1,060

Part 2:

Youth 19-24

Overall numbers have fallen at all levels & sectors with the exception of 'Manufacturing & Engineering'

Figure 6. Manchester resident (19-24) SFA funded course starts by sector 2012/13 - 2013/14

		Entry & Level 1		Level 2		Level 3		Level 4, 5 or Higher		N/A (Other)		Total	
		2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
High growth sectors	Creative	362	85	47	50	138	149	76	95	101	34	724	413
	Digital	528	330	208	105	91	79	43	13	81	65	951	592
	Education	13	23	65	52	54	43	20	17	34	10	186	145
	Business administration / F&P	410	313	483	404	173	155	95	63	95	75	1,256	1,010
	Health & Social Care	356	232	832	426	295	282	29	28	79	63	1,591	1,031
	Manufacturing & Engineering	129	186	176	233	34	45	16	22	24	11	379	497
Risk of undersupply sectors	Construction	237	64	218	161	51	67	17	7	53	90	576	389
	Retail	486	423	511	504	100	109	2	3	123	9	1,222	1,048
	Tourism	43	20	145	118	66	55	11	21	60	25	325	239
Other sectors	Environment	70	34	23	16	6	9	3	0	10	2	112	61
Non-sector specific	Employability	7,425	6,678	1,286	881	16	6	2	5	1,596	1,852	10,325	9,422
	Academic	9	21	588	657	207	128	7	36	94	22	905	864
	Not applicable	24	104	11	7	0	0	0	0	1,602	1,436	1,637	1,547
	Unknown	0	0	0	0	0	0	6	4	677	204	683	208
	Grand Total	10,092	8,513	4,593	3,614	1,231	1,127	327	314	4,629	3,898	20,872	17,466

Source: SFA 2013/14

The Manchester College & MAES still dominate

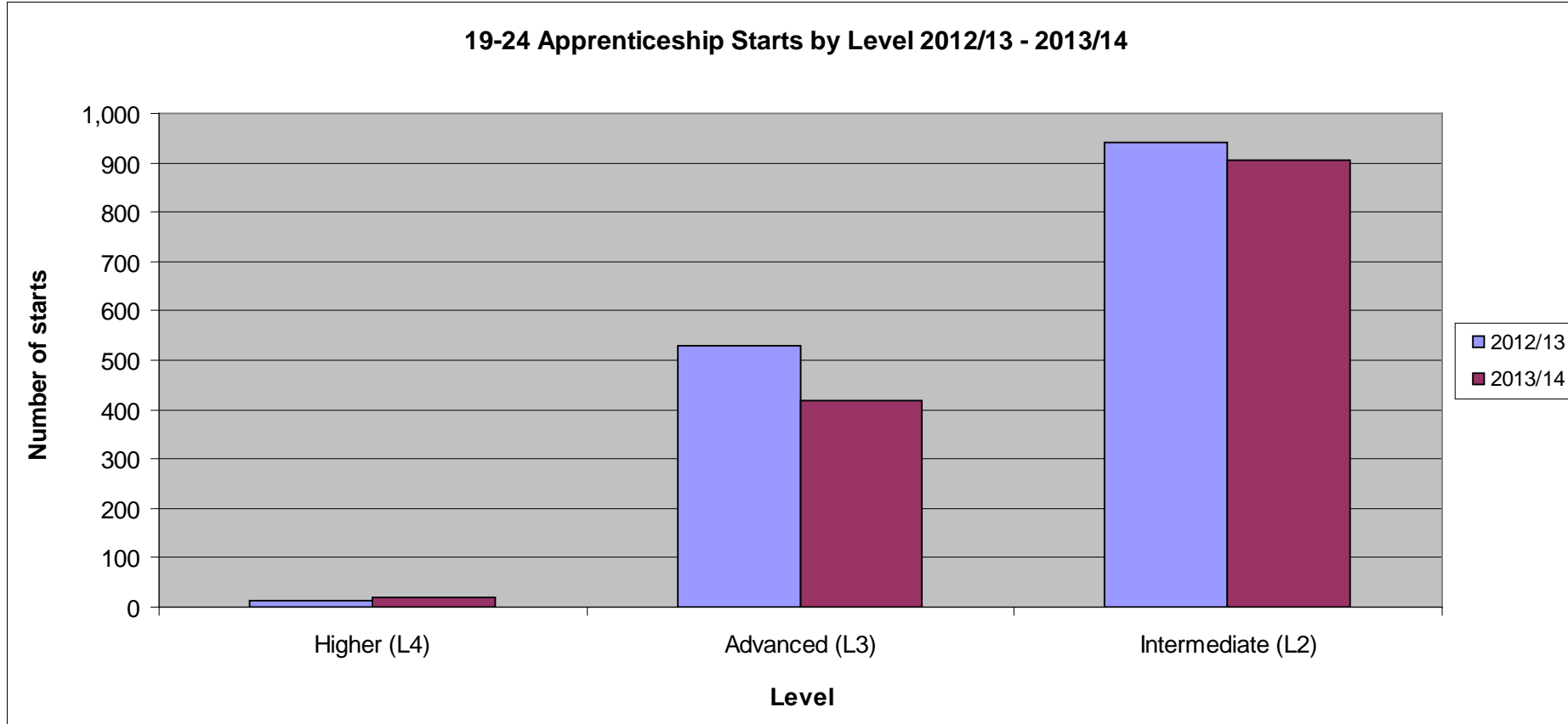
Figure 7. Manchester resident Youth (19-24) SFA funded course starts by provider 2013/14

Provider	Starts	Leavers	Achievements
MANCHESTER COLLEGE, THE	9,037	8,676	6,443
MANCHESTER CITY COUNCIL	2,158	2,156	1,865
STOCKPORT COLLEGE	562	520	370
TRAFFORD COLLEGE	477	431	320
NCG	424	415	415
ECONOMIC SOLUTIONS LIMITED	280	243	194
LEARNDIRECT LIMITED	259	250	200
SALFORD CITY COLLEGE	220	216	117
HOPWOOD HALL COLLEGE	140	131	79
THE OLDHAM COLLEGE	126	114	86
CALDERDALE COLLEGE	119	74	73
ESG (SKILLS) LIMITED	104	104	89
PETROC	94	94	94
CHEADLE AND MARPLE SIXTH FORM COLLEGE	86	79	37
MILTON KEYNES COLLEGE	79	78	49
WEST NOTTINGHAMSHIRE COLLEGE	77	46	45
BURY COLLEGE	76	70	56
HAVERING COLLEGE OF FURTHER AND HIGHER EDUCATION	65	65	62
TAMESIDE COLLEGE	63	53	41
AVANTA ENTERPRISE LIMITED	53	49	42

Source: SFA 2013/14

Falling 19-24 apprenticeships – especially at L3

Figure 8. Manchester resident Youth Apprenticeship (19-24) starts by level 2012/13 - 2013/14



Overall numbers have fallen & 'Business Administration' remains the most popular

Figure 9. Manchester resident Youth Apprenticeship (19-24) starts by sector 2013/14

	Sector	Intermediate	Advanced	Higher	Total
High growth sector	Creative	3	1	4	8
	Digital	9	2	12	23
	Education	7	16	0	23
	Financial & Professional	18	17	9	44
	Business administration	344	125	2	471
	Health & Social Care	135	127	3	265
	Manufacturing/engineering	45	25	0	70
Risk of undersupply sectors	Construction	32	11	0	43
	Retail	54	11	0	65
	Tourism & Hospitality	113	18	0	131
	Transport & storage	62	8	0	70
Other sectors	Environment	3	0	0	3
	Personal services	59	33	1	93
	Public administration	6	2	0	8
	Sport	15	8	0	23
Non sector specific	Not applicable	0	1	0	1
	Grand Total	905	405	31	1,341

Private providers still dominate but big increase for The Manchester College

Figure 10. Manchester resident Youth Apprenticeship (19-24) starts by provider 2013/14

	Intermediate	Advanced	Higher	Total
MANCHESTER COLLEGE, THE	124	52	1	177
ECONOMIC SOLUTIONS LIMITED	85	51	3	139
BABCOCK TRAINING LIMITED	36	8		44
TRAFFORD COLLEGE	28	12	1	41
PARAGON EDUCATION & SKILLS LIMITED	30	10		40
ESG (SKILLS) LIMITED	18	16		34
LEARNDIRECT LIMITED	23	11		34
LIFETIME TRAINING GROUP LIMITED	29	4		33
DAMAR LIMITED	17	14	1	32
TOTAL PEOPLE LIMITED	18	10	3	31
GREATER MANCHESTER CHAMBER OF COMMERCE	15	12		27
GP STRATEGIES TRAINING LIMITED	15	10		25
SKILLS FOR HEALTH LIMITED	8	15		23
MICHAEL MCCORMACK	14	7		21
EQL SOLUTIONS LIMITED	13	7		20
JOINT LEARNING PARTNERSHIP LIMITED	11	8	1	20
NORTH LANCS. TRAINING GROUP LIMITED(THE)	18	2		20
SALFORD CITY COLLEGE	10	9		19
MCDONALD'S RESTAURANTS LIMITED	18			18
NCG	14	4		18

Source: SFA 2013/14

Part 3:

Adult 25+

Overall numbers have increased, largely driven by big increase in Entry Level 'Employability' (PFL)

Figure 11. Manchester resident (25+) SFA funded course starts by sector 2012/13 - 2013/14

		Entry & Level 1		Level 2		Level 3		Level 4, 5 or Higher		N/A (Other)		Total	
		2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
High growth sectors	Creative	613	638	256	139	96	70	40	42	1,553	558	2,558	1,447
	Digital	2,259	2,285	801	387	138	59	25	18	2,249	2,183	5,472	4,932
	Education	80	82	235	238	219	172	189	95	213	94	936	681
	Business administration /F&P	841	945	1,308	1,269	313	198	95	98	746	694	3,303	3,204
	Health & Social Care	1,147	1,236	2,612	2,030	683	414	54	76	669	465	5,165	4,221
	Manufacturing & Engineering	219	846	568	856	40	83	12	18	427	145	1,266	1,948
Risk of undersupply sectors	Construction	438	135	497	541	145	125	17	18	78	116	1,175	935
	Retail	1,299	1,515	1,096	1,409	128	120	3	3	524	92	3,050	3,139
	Tourism	91	25	244	228	44	45	8	12	101	85	488	395
Other sectors	Environment	277	69	77	76	7	13	1	1	48	25	410	184
Non-sector specific	Employability	23,659	30,739	2,845	2,536	11	0	0	3	7,291	10,126	33,806	43,404
	Academic	49	96	985	1,054	147	79	18	44	931	335	2,130	1,608
	Not applicable	36	333	20	29	3	12	0	0	2,596	2,330	2,655	2,704
	Unknown	0	0	0	0	0	0	3	3	1,410	487	1,413	490
	Grand Total	31,008	38,944	11,544	10,792	1,974	1,390	465	431	18,836	17,735	63,827	69,292

Source: SFA 2013/14

The Manchester College & MAES still dominate provision

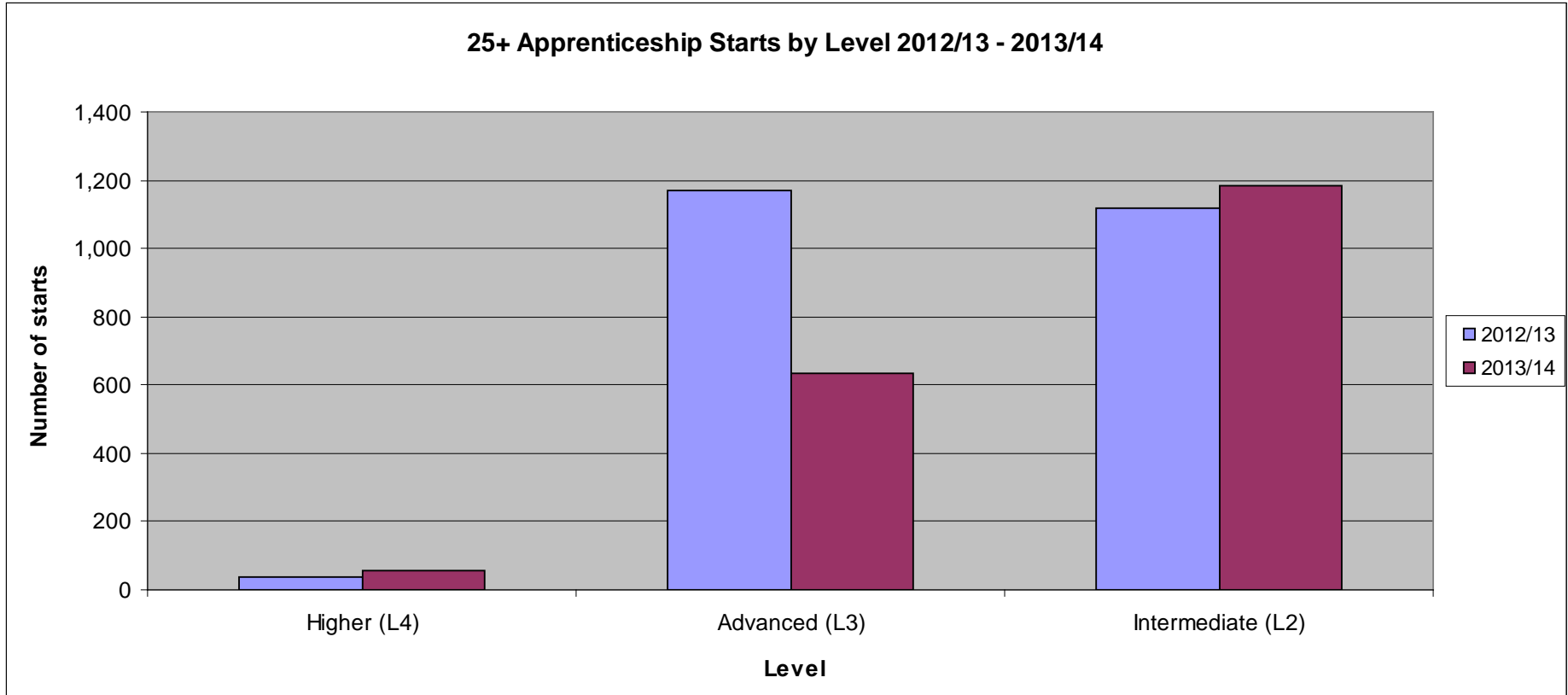
Figure 12. Manchester resident Adult (25+) SFA funded course starts by provider 2013/14

Provider	Starts	Leavers	Achievements
MANCHESTER COLLEGE, THE	30,049	28,795	23,604
MANCHESTER CITY COUNCIL	19,875	19,850	17,197
LEARNDIRECT LIMITED	1,528	1,456	1,192
WORKERS' EDUCATIONAL ASSOCIATION	1,206	1,151	838
NCG	998	983	975
TRAFFORD COLLEGE	961	880	762
PETROC	870	866	853
ESG (SKILLS) LIMITED	823	819	745
SALFORD CITY COLLEGE	810	783	396
STOCKPORT COLLEGE	808	768	616
ECONOMIC SOLUTIONS LIMITED	708	608	504
CALDERDALE COLLEGE	696	481	478
HOPWOOD HALL COLLEGE	388	379	339
THE OLDHAM COLLEGE	359	325	276
TAMESIDE COLLEGE	341	305	243
MANTRA LEARNING LIMITED	275	254	214
HAVINGERING COLLEGE OF FURTHER AND HIGHER EDUCATION	242	241	236
SYSTEM GROUP LIMITED	204	204	203
STOCKPORT METROPOLITAN BOROUGH COUNCIL	193	191	149
LAKES COLLEGE WEST CUMBRIA	184	184	161

Source: SFA 2013/14

Falling 25+ apprenticeships at L3 (impact of learner loans?)

Figure 13. Manchester resident Adult Apprenticeship (25+) starts by level 2012/13 - 2013/14



Overall numbers have fallen - Health & Social Care & Business Admin most popular

Figure 14. Manchester resident Adult Apprenticeship (25+) starts by sector 2013/14

	Sector	Intermediate	Advanced	Higher	Total
High growth sector	Creative	0	0	0	0
	Digital	11	2	0	13
	Education	8	85	0	93
	Financial & Professional	25	8	2	35
	Business administration	343	172	29	544
	Health & Social Care	322	269	25	616
	Manufacturing/engineering	106	7	0	113
Risk of undersupply sectors	Construction	18	2	0	20
	Retail	33	7	0	40
	Tourism & Hospitality	126	28	0	154
	Transport & storage	62	4	0	66
Other sectors	Environment	9	2	0	11
	Personal services	91	29	0	120
	Public administration	11	9	0	20
	Sport	17	9	0	26
	Grand Total	1,182	633	56	1,871

UK College's deliver a large volume of adult apprenticeship training

Figure 15. Manchester resident Adult Apprenticeship (25+) starts by provider 2013/14

	Intermediate	Advanced	Higher	Total
MANCHESTER COLLEGE, THE	70	43	6	119
EQL SOLUTIONS LIMITED	17	94		111
ESG (SKILLS) LIMITED	62	28		90
LEARNDIRECT LIMITED	49	19		68
ECONOMIC SOLUTIONS LIMITED	26	34	6	66
BABCOCK TRAINING LIMITED	48	17		65
PARAGON EDUCATION & SKILLS LIMITED	44	19		63
GP STRATEGIES TRAINING LIMITED	36	14	4	54
WEST NOTTINGHAMSHIRE COLLEGE	53	0		53
GREATER MANCHESTER CHAMBER OF COMMERCE	25	26		51
JOINT LEARNING PARTNERSHIP LIMITED	24	23	1	48
TRAFFORD COLLEGE	18	28	1	47
LIFETIME TRAINING GROUP LIMITED	31	9		40
NCG	24	14		38
SKILLS FOR HEALTH LIMITED	10	26		36
TOTAL PEOPLE LIMITED	13	19	2	34
MIC SKILLS & EMPLOYABILITY LTD	25	5		30
DAWN HODGE ASSOCIATES LIMITED	17	6	5	28
SOUTH TYNESIDE COLLEGE	25			25
IMPACT LEARNING & DATA SOLUTIONS LIMITED	20	4	0	24