

# Thinking about Hampshire's future labour market

HAMPSHIRE 2050 INQUIRY

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# Overview

- What are the broad trends in skills demand?
- What kind of work do Hampshire's businesses demand?
- How can this work be delivered in future?
- Trade, technology and automation
- Aging and the limits of technology
- The spatial dimension of productivity
- Strengths in different towns
- The need for quality jobs across the county



# Our theme

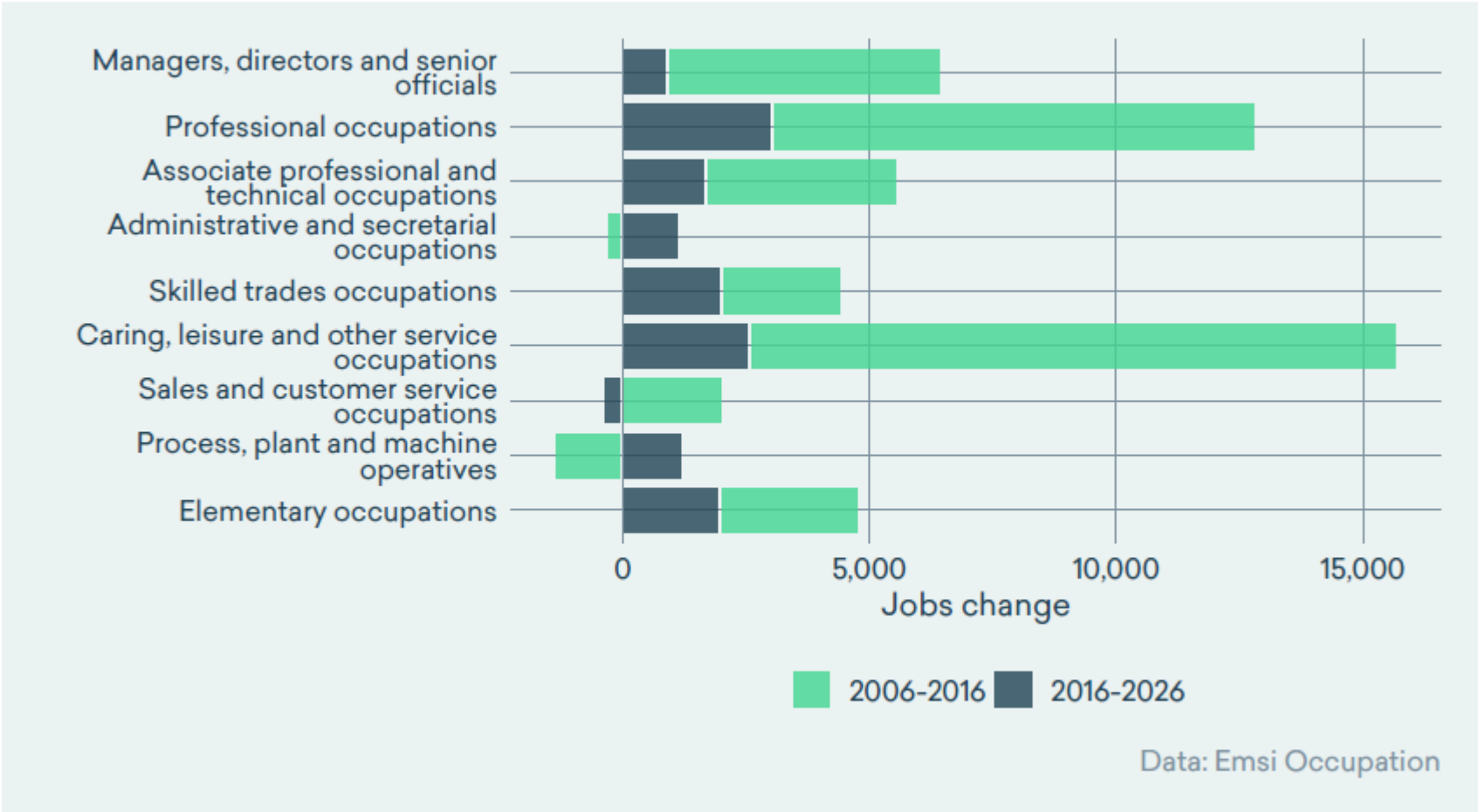
Labour market projections are powerful tools: but what they don't do is tell us *the* future.

The choices we make regarding how we work, how we live and how we learn will have consequences for the skills and tasks businesses demand in Hampshire.

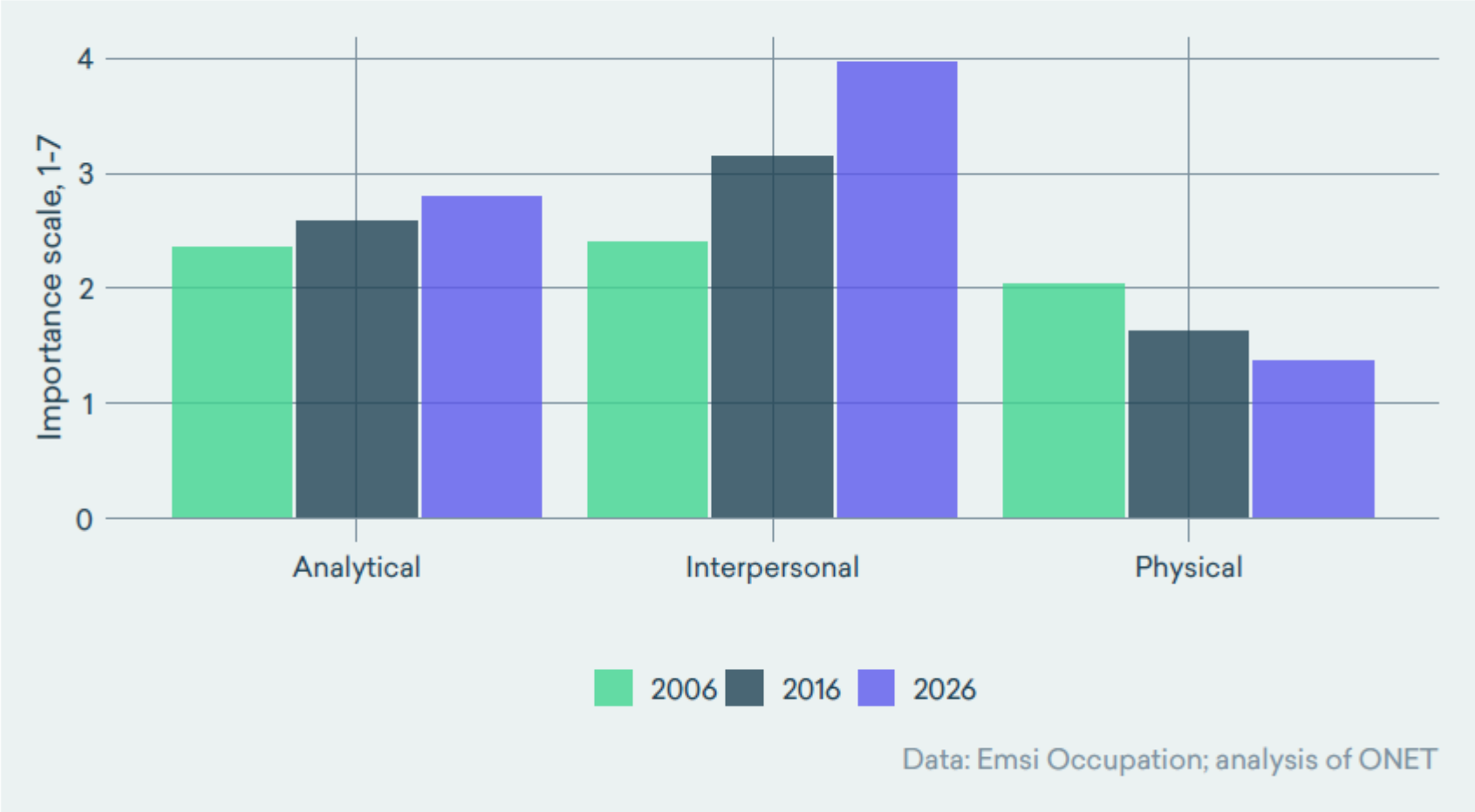
Those consequences can take Hampshire down different paths as it seeks higher performance and greater inclusivity.



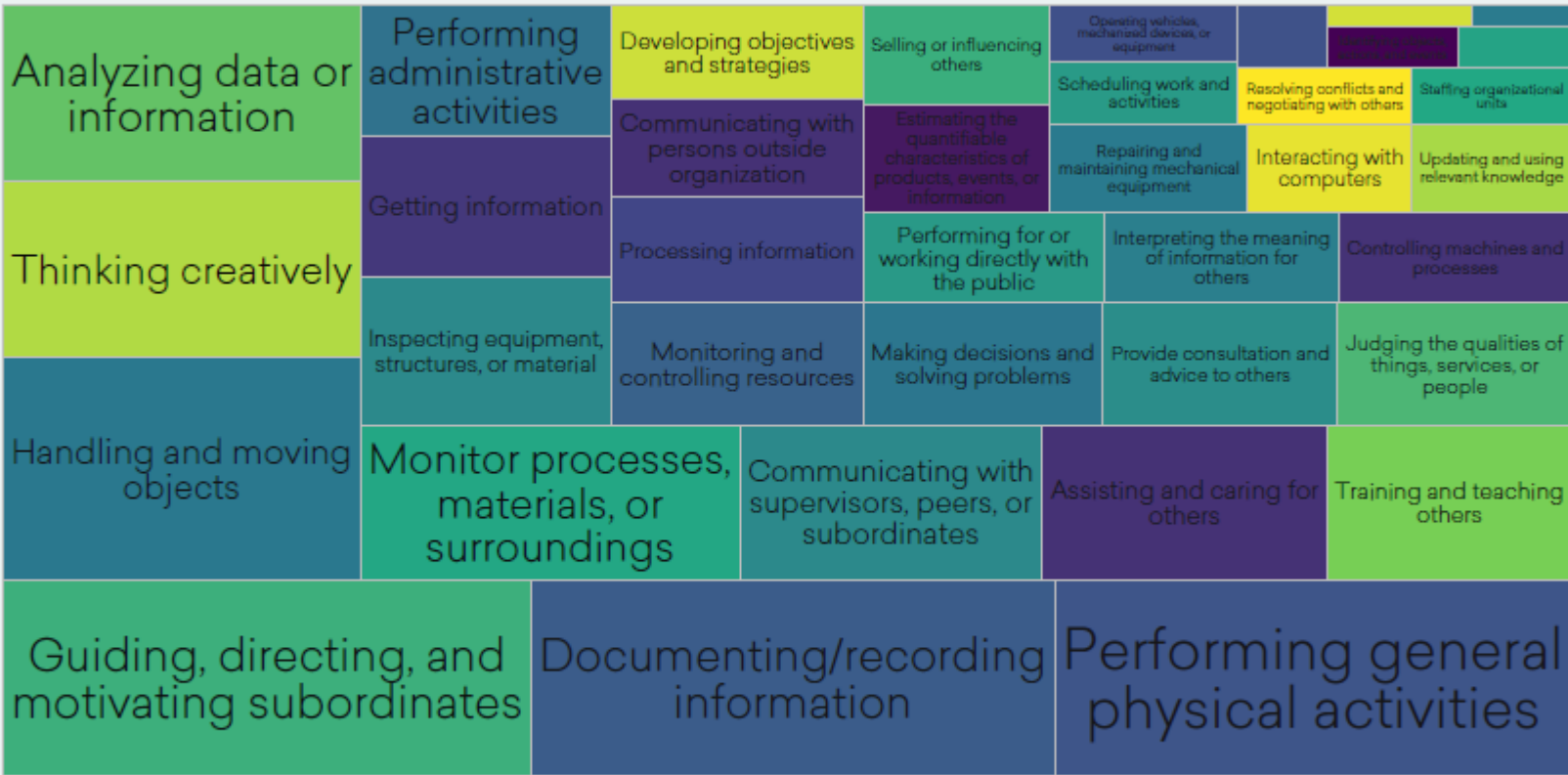
# Changing patterns of job demand



# Changing patterns of skills demand



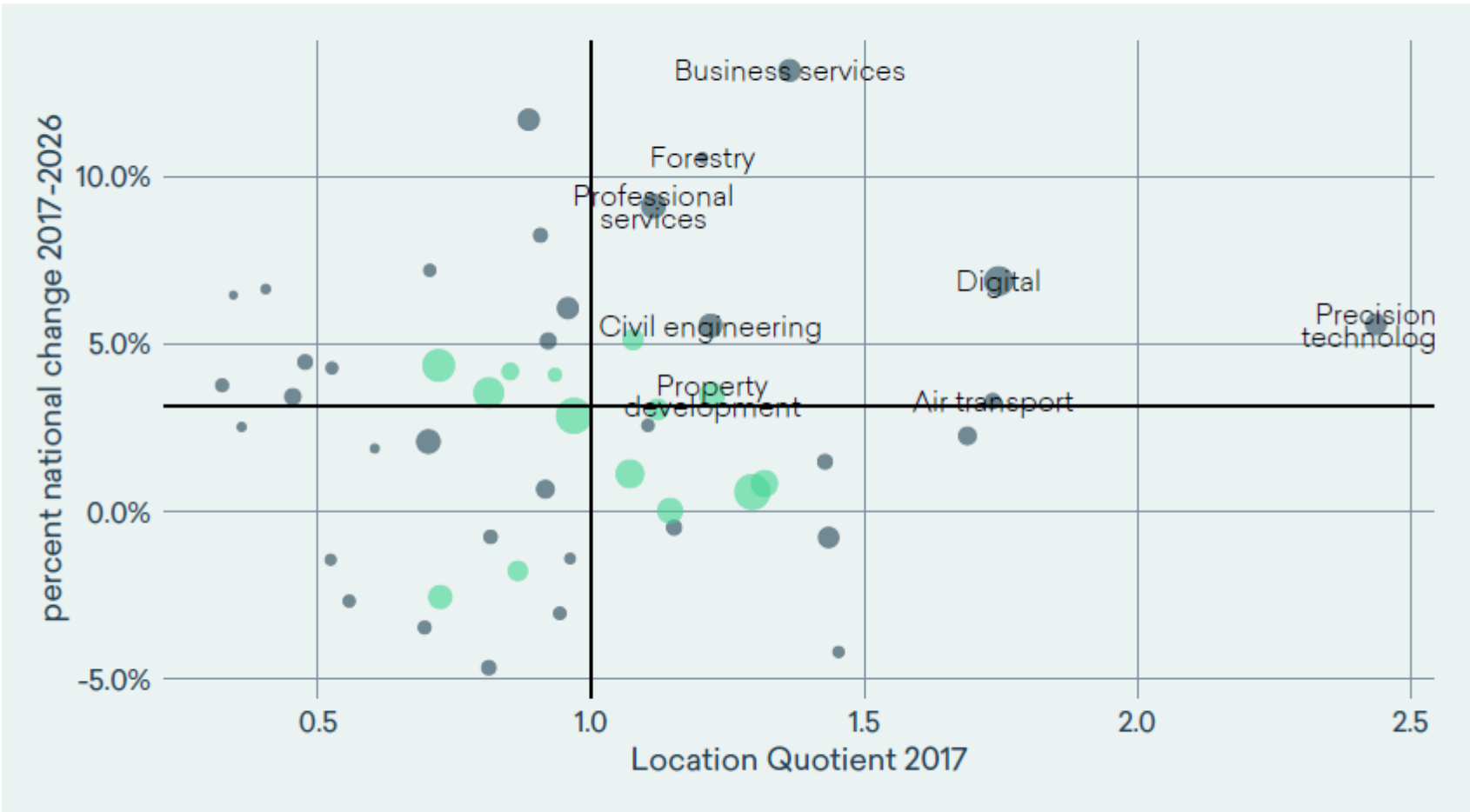
# Tasks can tell us more than jobs



Data: Emsi Occupation and Emsi analysis of ONET 22.2



# Cluster strengths: jobs in the right places



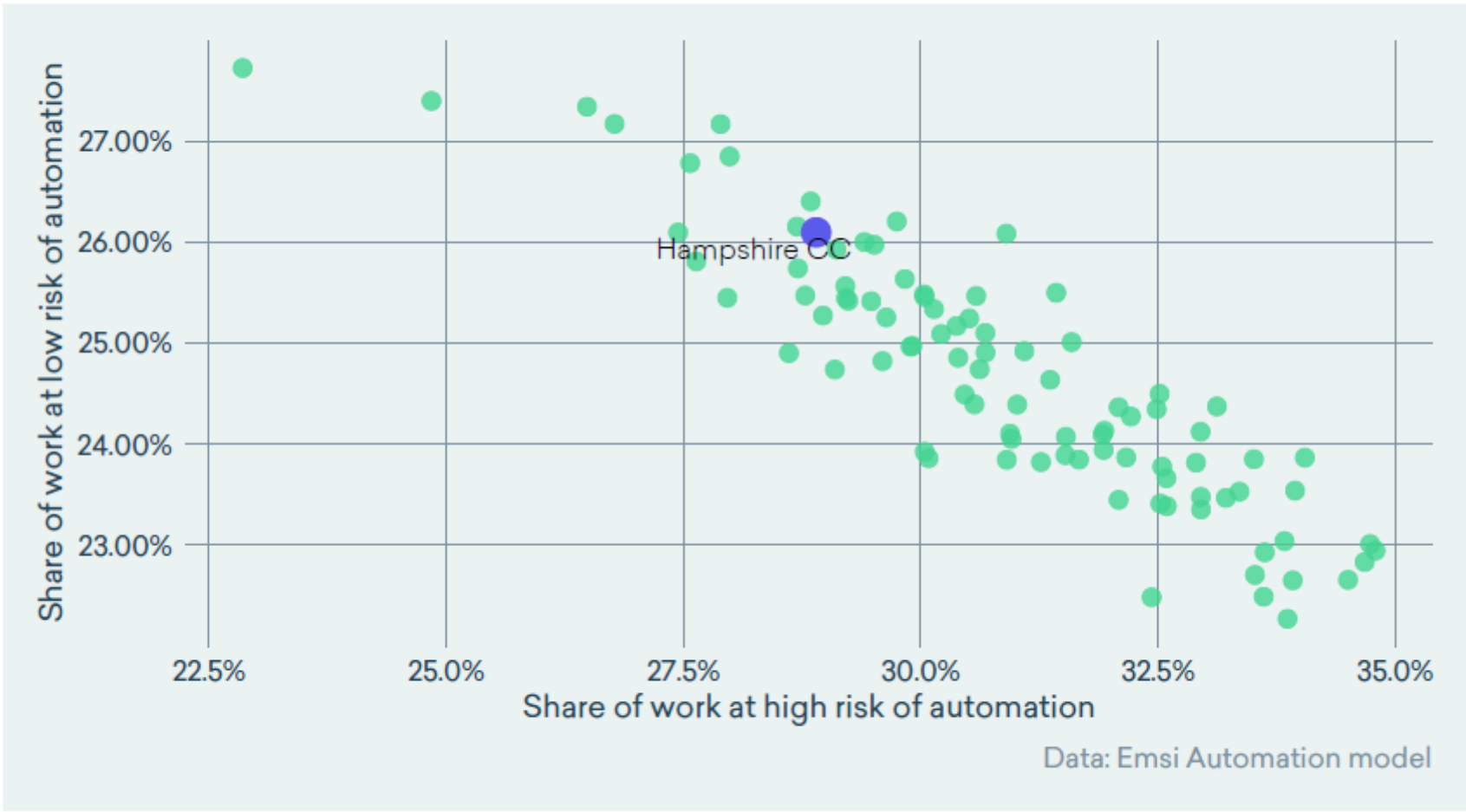
# Trade, technology and migration: how to deliver tasks?

- Employers' demands for tasks can outweigh the workforce supplying them
- Trade, technology and migration are all different ways of getting tasks delivered without using local workers
- That can help and hinder the prospects of local workers: a lot of variables at work
- In the long run, technology and trade help *most* local workers – as long as you're not *too much* in the firing line
- Not every task can be traded or automated: some work still has to be done locally

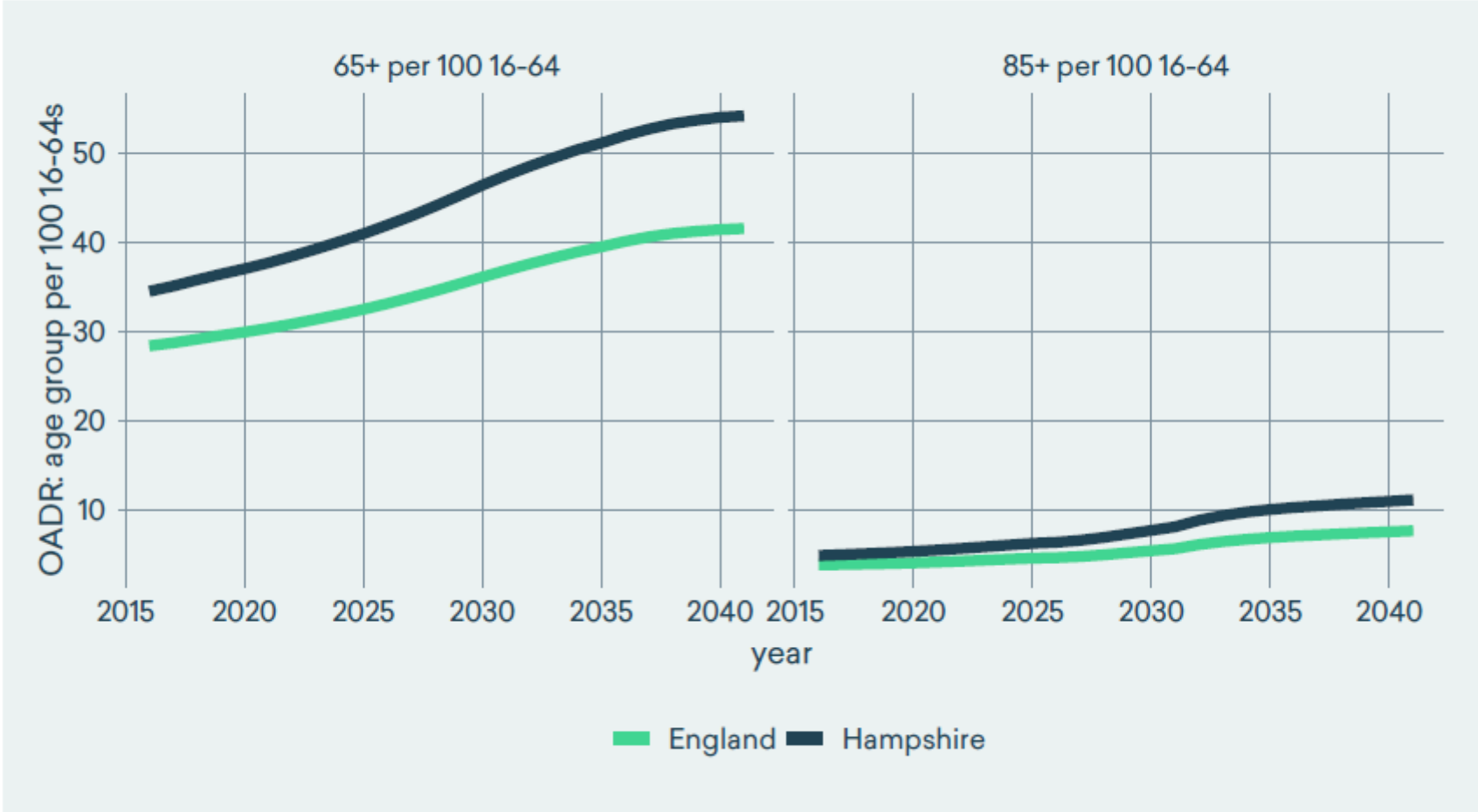




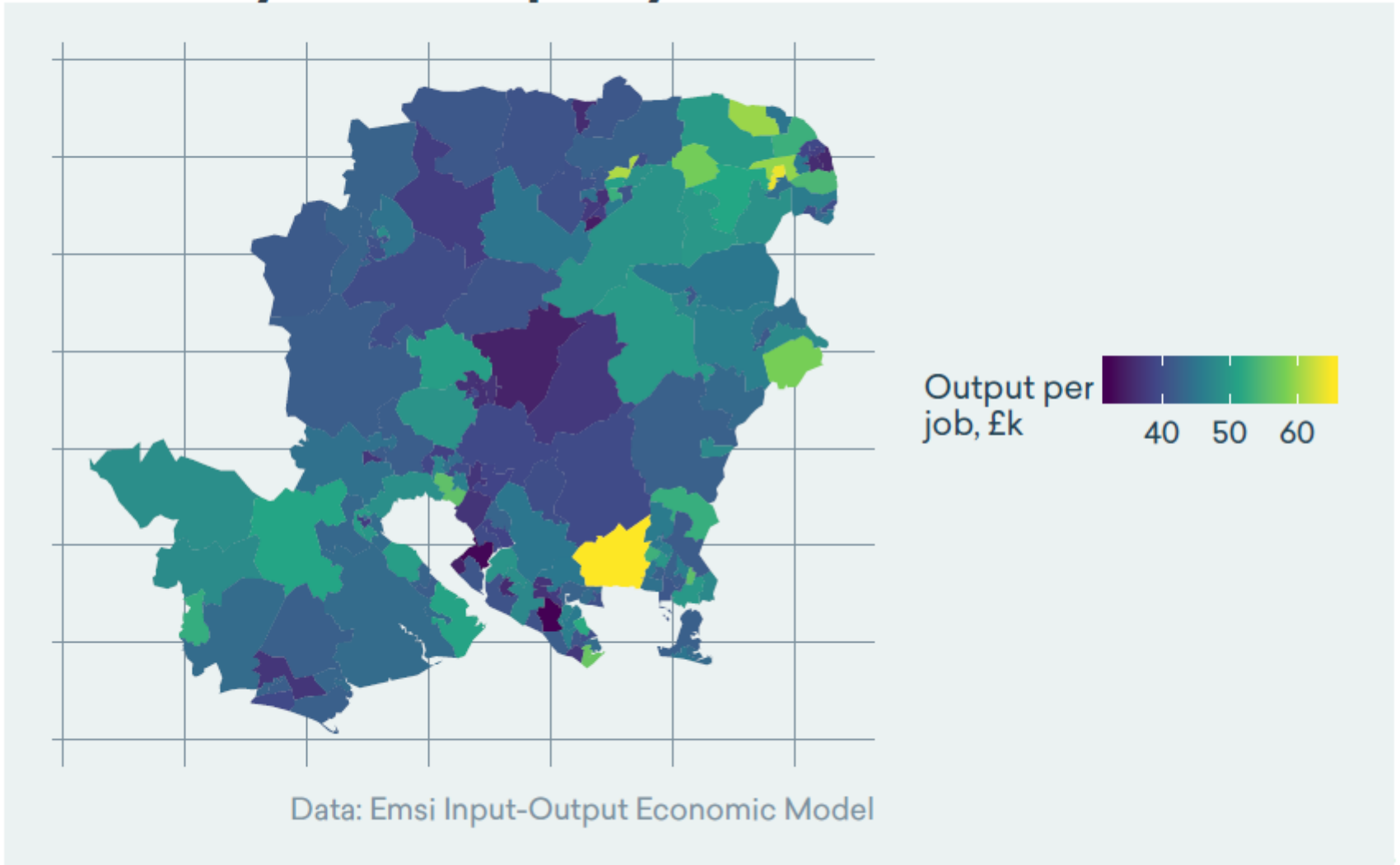
# Automation: risk *and* opportunity for Hampshire?



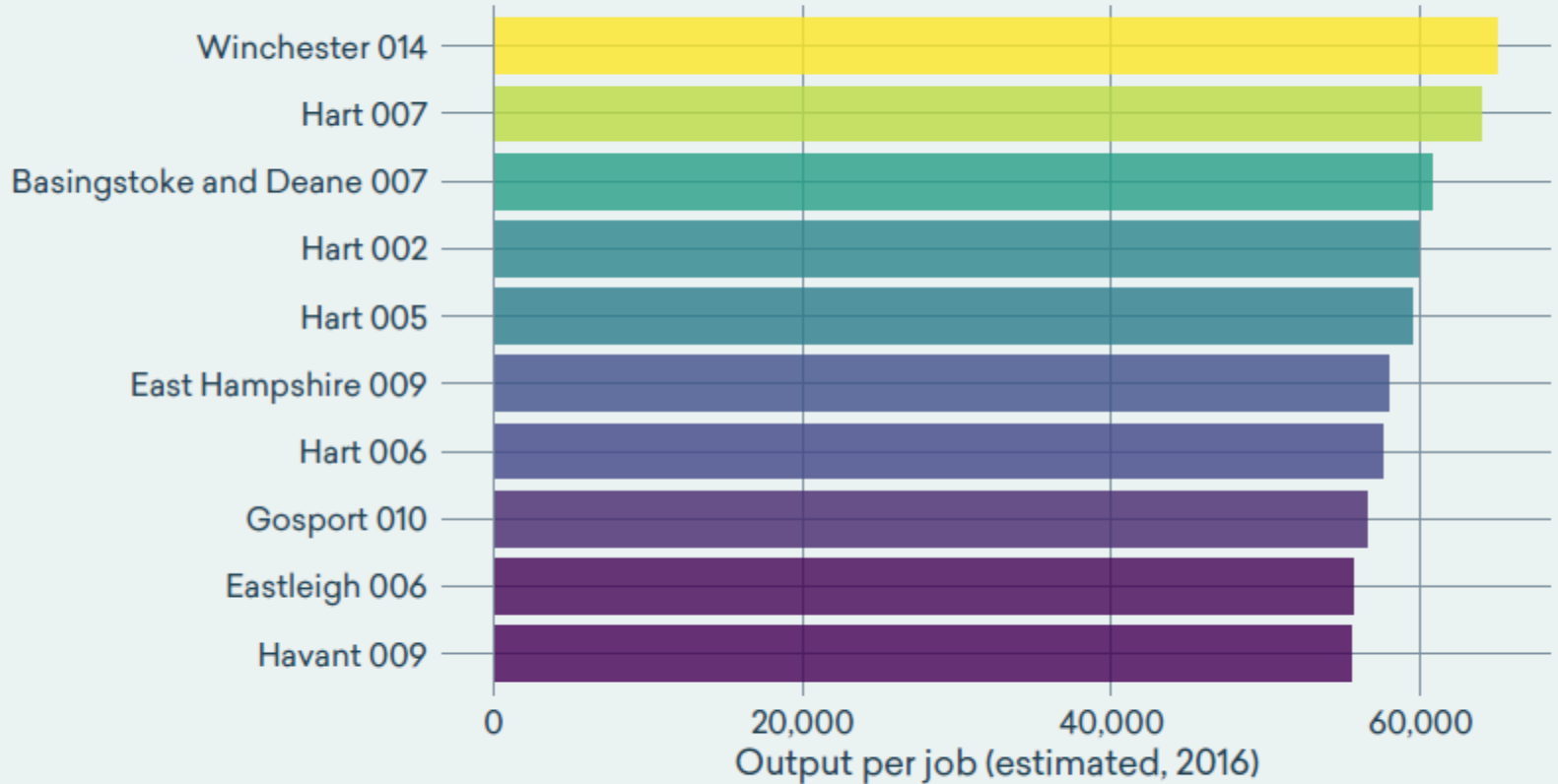
# Some demands can't be automated



# Productivity is not equally distributed



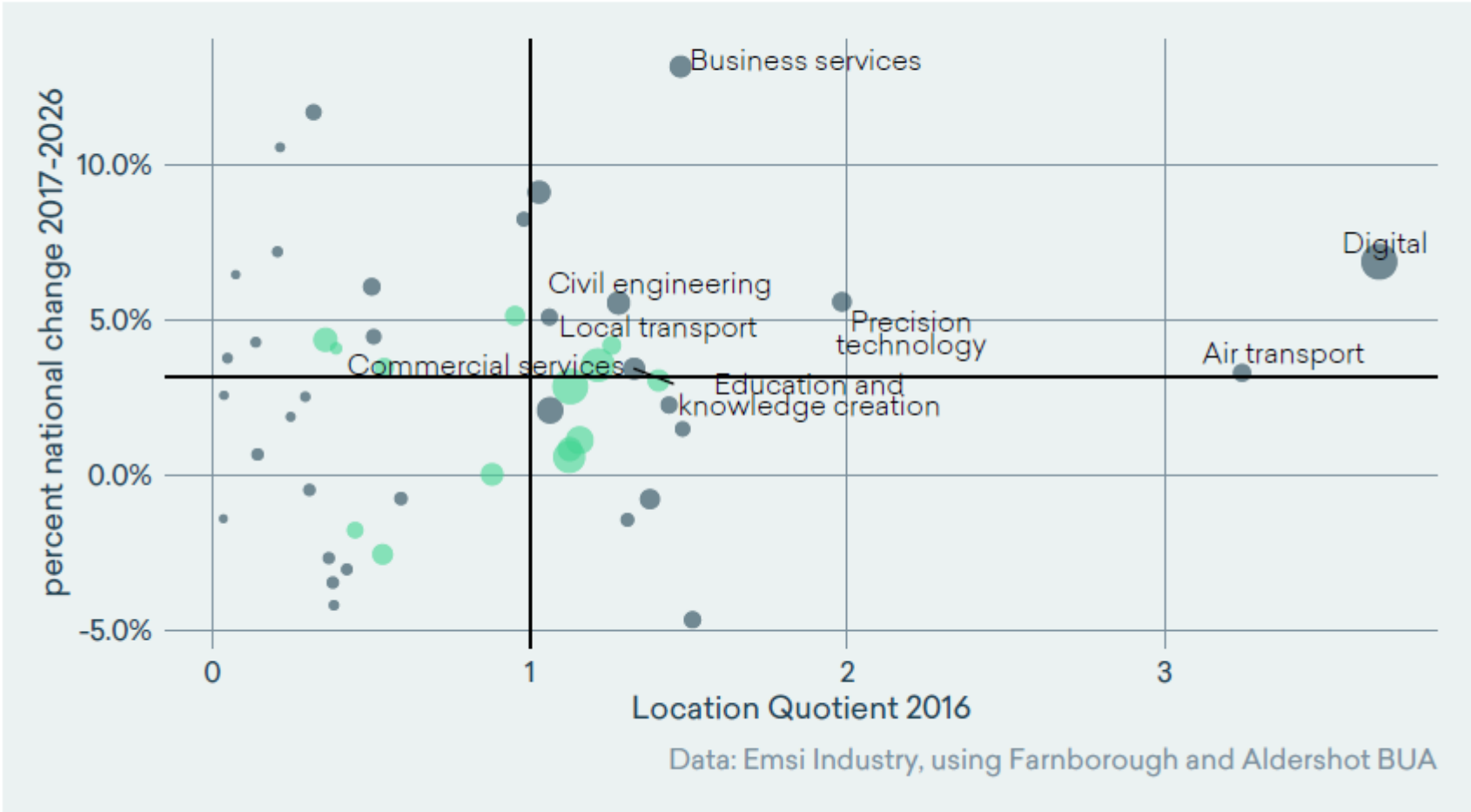
# Top 10 small areas for productivity



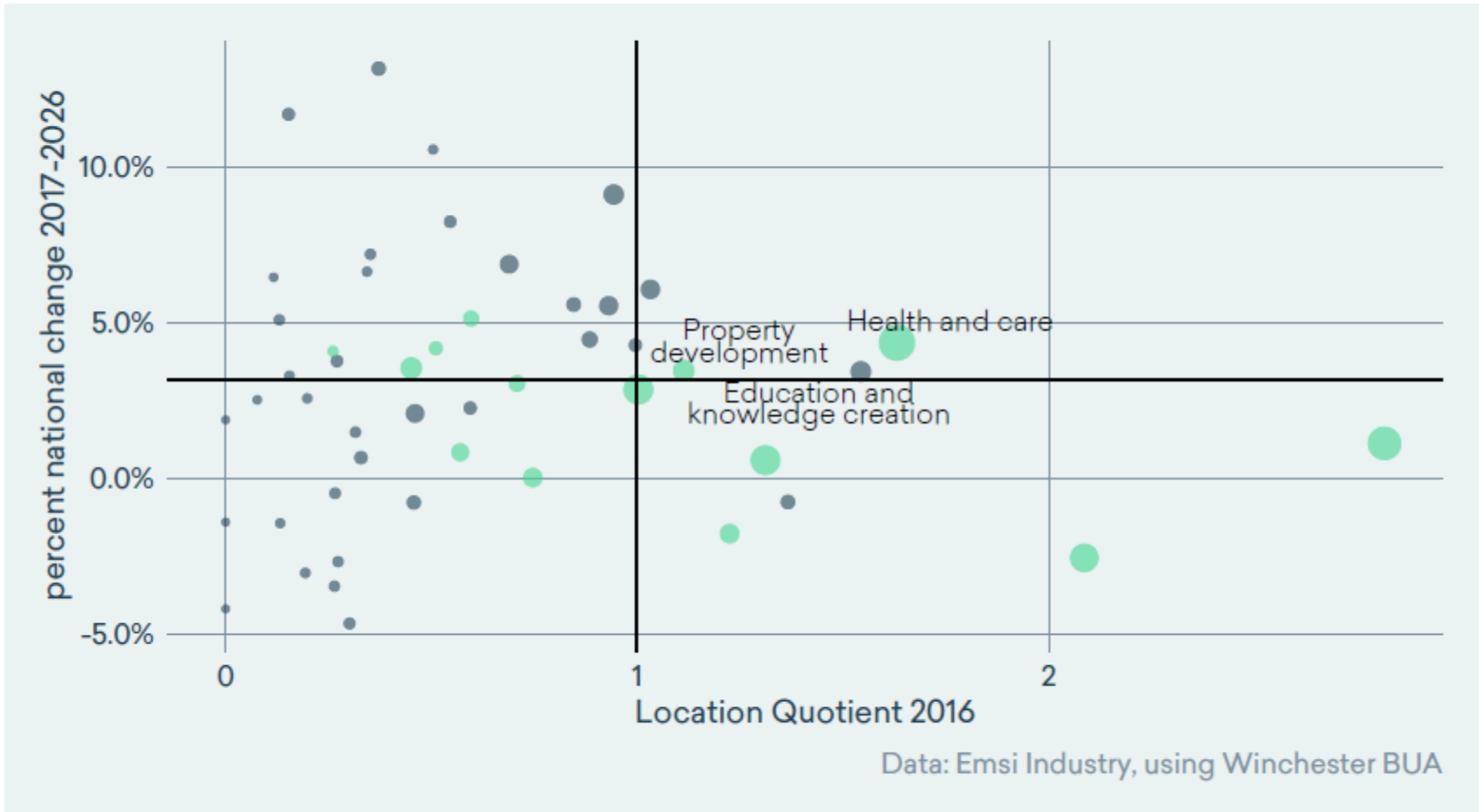
Data: Emsi Input-Output Economic Model and analysis of MSOA BRES data



# Town clusters: Farnborough/Aldershot



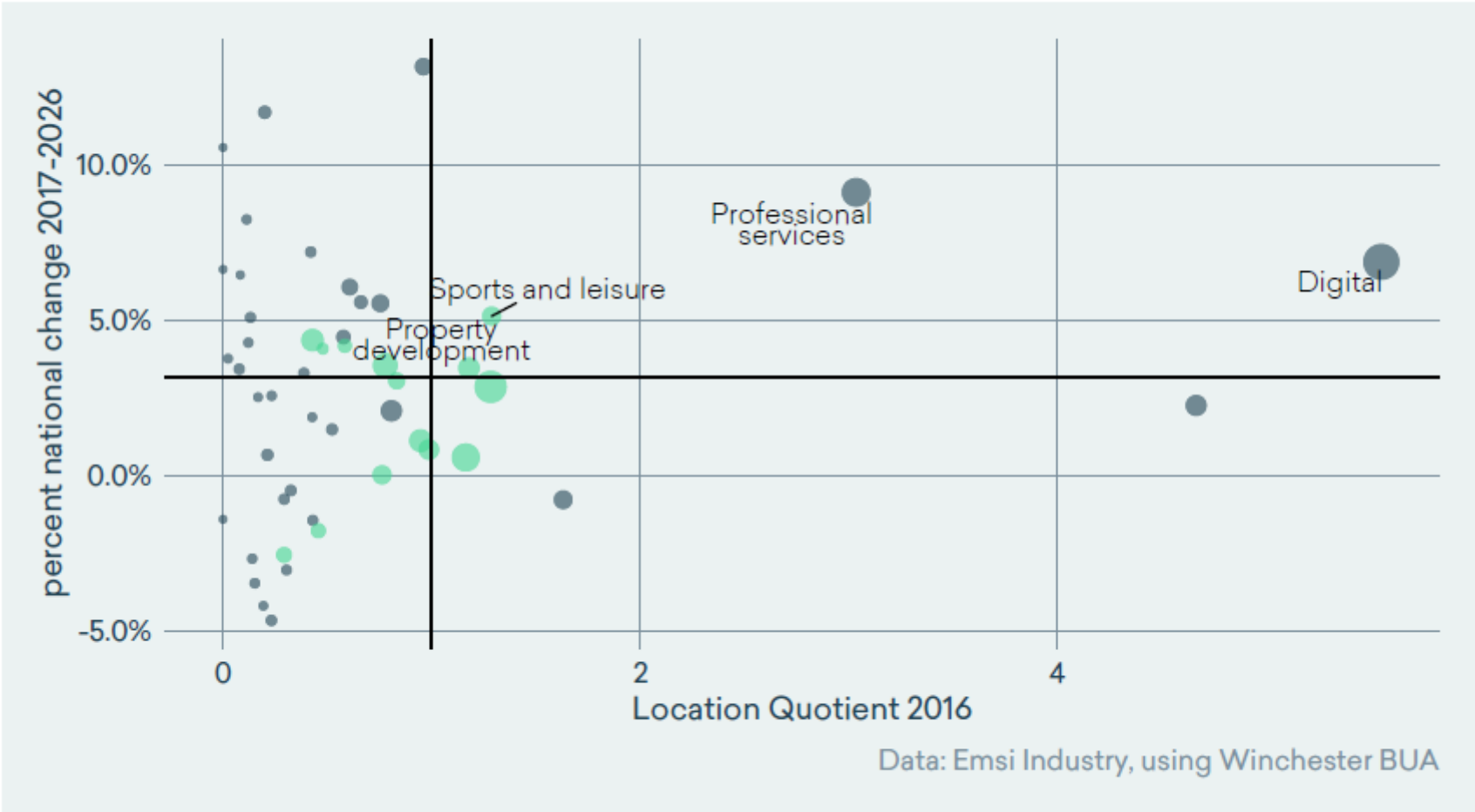
# Town clusters: Winchester



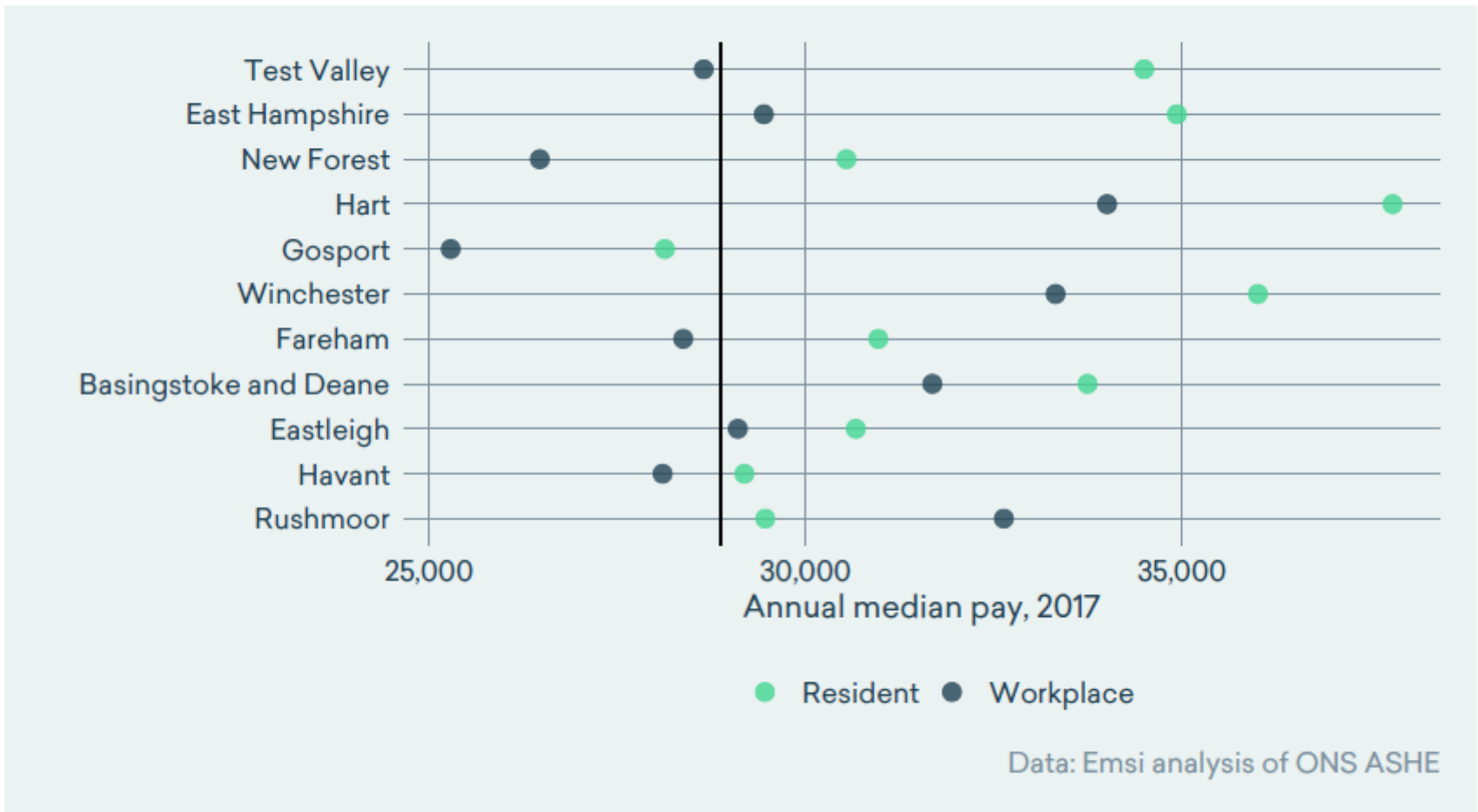
Data: Emsi Industry, using Winchester BUA



# Town clusters: Fleet



# A good place to live? But what about work?





# Summing up

- Labour market activity reflect local institutional choices as well as global trends – thinking about how we prepare workers and how business develops is important
- Those trends have led to a polarisation in jobs demand in recent times: more at the top, more at the bottom
- In all cases, the shift to services means an economy which values interpersonal skills, *then* analytical skills, with a declining need for physical skills
- Hampshire well-placed to gain from those global trends in many ways: strong industry clusters with the potential to grow and take advantage of technological change
- How Hampshire responds to technological change, and the continuing rise in demand for adult social care, will change labour market prospects
- But *not everywhere* in Hampshire stands to gain equally: agglomeration effects can mean a good place to live may not be a good place to find a career

