

Regional Skills Assessment Glasgow City Region

October 2024



Regional Skills Assessments

First launched in 2014, the Regional Skills Assessments (RSAs) provide a robust and consistent evidence base to support partners in strategic skills investment planning. Skills Development Scotland (SDS) has worked with key partners and stakeholders in the production of RSAs to ensure an inclusive approach to their development, dissemination and utilisation.

RSAs include forecast data that has been commissioned through Oxford Economics. The Technical Note¹ provides full detail on the caveats that must be applied when using forecast data, but broadly, it should be noted that:

- Forecasts are based on what we know now and include past and present trends projected into the future.
- The more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.
- Their value is in identifying likely directions of travel rather than predicting exact figures.
- The forecasts do not account for national or regional activities, initiatives or investments that are planned.

Industries and occupations used in the RSAs are defined by standard industrial classifications (SIC)² and standard occupational classifications (SOC).³

This RSA report is for the Glasgow City Region, which covers the East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire and West Dunbartonshire local authorities. The local authorities covered in this report align with those in the Glasgow City Regional Economic Partnership.

The RSAs are part of a suite of Labour Market Insight publications by SDS. Other products in the suite include:

Economy, People and Skills report which provides succinct and up-to-date evidence on Scotland's economy, businesses and people. It is updated monthly.

Sectoral Skills Assessments provide Labour Market Insight for key sectors across Scotland. These are updated annually.

The <u>Data Matrix</u> is an interactive tool, offering more detailed data from a variety of sources in a visually engaging format. It is updated frequently.

Throughout the report, we indicate where **local authority information is available through the Data Matrix.** The Data Matrix also contains additional data for the region, including data on employment, unemployment, and economic inactivity from the Annual Population Survey. These are available under the theme Skills Supply.

RSA Summary Infographics are also available, which provide a summary of the forecast data down to local authority level.

Alongside the suite of Labour Market Insight publications, SDS also produces a wide range of reports such as statistics on Modern Apprenticeships and the Annual Participation measure for 16-19 year olds. This includes a wide range of data related to equalities. Further information can be found on the <u>Publications and Statistics</u> section of the SDS website.

We value user feedback on the Regional Skills Assessments. If you would like to provide feedback, please do so <u>here</u>. For any further information or queries on the RSAs or any of our other products, please contact: **RSA@sds.co.uk**

We held a series of webinars to complement the publication of the Regional Skills Assessments.



The recording of the Glasgow City Region webinar can be found on the SDS YouTube Channel <u>here</u>.

You can also watch the webinars for other regions and key sectors in Scotland <u>here</u>.

1. RSA Technical Note (2024).

2. Office for National Statistics UK Standard Industrial Classification (SIC) (SO 2007.

3. Office for National Statistics UK Standard Occupational Classification (SOC) 2010.

The Context for Scotland's Labour Market

Within the last 10 years, the economy has faced significant disruption due to events such as the pandemic, Brexit, the war in Ukraine, and the cost-of-living crisis. In addition, megatrends around demography, technology, and the environment have continued shaping Scotland's economy and labour market, many of which are interdependent. Below is an overview of the drivers expected to have the greatest influence on Scotland's labour market outlook in the near term, based on a comprehensive analysis of structural and cyclical factors.



The economic outlook for Scotland has improved, but growth is still expected to be modest in 2024, after annual GDP figures estimated the Scottish economy (like that of the UK) remained broadly flat throughout 2023. While inflation rates have eased from their peak in October 2022, the effects of rising prices and high interest rates continue to impact Scottish households and businesses. Scotland has experienced a tight labour market in recent years, but there have been signs of this loosening in 2024.



Scotland has an ageing population. In 2022, around 20 per cent of Scotland's population was aged 65 years or over, and around 15 per cent were aged under 15 years old. Population growth is also expected to slow in the next decade, and it is anticipated that the country is likely to rely on in-migration for population growth. These demographic changes in Scotland have important implications for the labour market and economy.



Inclusive Growth and Equality

Scotland continues to experience inequality, which can impact individuals' access to labour market opportunities. Cost-of-living pressures have affected different groups disproportionately, particularly in lower-income households. Geographical inequalities also exist across Scottish regions that can affect individuals' access to opportunities. There have been some advances in improving diversity within the workforce and reducing inequality, but challenges remain.

Technology and Automation

Scotland has a strong technology sector, with specific strengths in digital technology, life sciences and financial technology (fintech). The current makeup of the technology sector suggests AI will likely be the most important technological advance for the foreseeable future. It is estimated that 60 per cent of jobs in developed countries will be affected by AI. This could be disruptive within the labour market, creating challenges and opportunities for job roles and businesses.



The Scottish and UK governments have committed to meeting targets for Net Zero carbon emissions. The transition to Net Zero will directly impact jobs, with potential for job growth in Scotland. Upskilling and reskilling will be vital to equip Scotland's workforce with the skills needed to meet the transition. Scotland is well placed to take a lead in the development of new green technologies building on its significant natural resources and strengths in key sectors.

 \mathbf{I} A fuller report on Scotland's Labour Market Drivers can be found <u>here</u>.

Regional Insight¹

Glasgow City Region is one of the largest City Regions in the UK and is "Scotland's economic powerhouse."

It has a well-established Regional Partnership, and its regional economic strategy was co-produced with partners and published in December 2022 with the vision that "by 2030, Glasgow City Region will have the most Innovative. Inclusive and Resilient Economy in the UK." Three key challenges underpin the strategy:

- Creating an inclusive economy:
- Enhancing productivity: and
- Accelerating climate action.

The subsequent Action Plan (2022) set out 12 strategic programmes to deliver the strategy.

Skills are at the heart of the economic strategy, building upon partners' implementation of the Regional Skills Investment Plans, and the importance of jobs and skills in the region's economic recovery plan. A highly skilled workforce is critical to the region's economic success, and a route out of unemployment and low pay. Although the City Region has one of the highest levels of the population with degree level qualifications among the UK Core Cities, it also has significant skills gaps and skills shortages,

and high levels of skills underutilisation. The OECD profiled Glasgow City Region and its challenges and opportunities in its international programme to futureproof skills and adult learning (September 2024), making recommendations on future delivery.

Glasgow City Region's £1 billion City Deal was the first City Deal in Scotland – signed in 2014 – and is now one of the largest and the most advanced in the UK delivering 21 infrastructure projects across the City Region.

The City Region has identified four short-term sectoral priorities:

- Heat Decarbonisation:
- Maritime:
- Local Government; and
- To support the investment zone and innovation districts.

The City Region has three innovation districts clustered around Glasgow and Strathclyde Universities and the Advanced Manufacturing Innovation District near Glasgow Airport, and in 2023 was awarded £33 million Innovation Accelerator funding to deliver 11 projects. Partners are currently developing proposals for the City Region Investment Zone that will seek to capitalise on its sectoral strengths in advanced manufacturing.

Glasgow City Region also remains the hub for Scotland's screen sector placing it at the nexus between digital and creative and cultural industries.

As part of its place-based approach, Glasgow City Region is developing a masterplan to ensure that those communities closest to the river benefit from its development as an engine of inclusive, sustainable growth.

The forecasts used in this Regional Skills Assessment are policy and investment neutral. This means the figures present a baseline outlook that takes into account historical trends and external economic conditions.

but the figures do not reflect investment or policy that is unconfirmed or at planning/development stage.

For example, the figures presented in this report do not reflect significant levels of investment expected in the region through City Deal, Innovation Accelerator and Investment Zone funding, major inward investments or Government decisions such as GB Energy Innovation Hub location.

The forecasts should be used in conjunction with other sources, and readers are encouraged to overlay these with their own local knowledge.



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Glasgow City Region estimated GVA in 2024: £46,383m

The Glasgow City Region was estimated to generate 31.8% of Scotland's output in 2024. This share of GVA ranked the region in the top quartile of RSA regions for GVA contribution to the Scottish economy.

In 2024, the highest value industries in the Glasgow City Region were estimated to be:

	Human Health and Social Work Activities	£5,490m
	Real Estate Activities*	£4,825m
Ì≡	Wholesale and Retail Trade	£4,313m
	Manufacturing	£4,115m

GVA forecast average annual growth (2024-2027) Glasgow City Region: 1.5% Scotland: 1.4%

GVA forecast average annual growth (2027-2034)

Glasgow City Region: 1.5%

Scotland: 1.3%

2.8% 2.7% 2.4% 2.5% 1.7% 1.9% 1.7% 1.8% 1.9% 1.6% 1.7% 2.0% 1.3% 1.8% 1.4% 2.0% 1.1% 1.7% 1.1% 1.2% 1.5% 1.1% 1.5% 1.4% 1.1% 1.2% 1.2% 1.0% 1.0% 1.5% 0.6% 0.8% 0.4%

Mid-term (2024-2027) Long-term (2027-2034)

1 0%

 For data on GVA at local authority level please see the Data Matrix. *(Theme: Skills Demand; Topic: Economic Output (GVA))*

1. SDS (2024). Oxford Economics Forecasts.

*GVA in the Real Estate industry is inflated by owner-occupier imputed rent. This reflects the value of services provided by homeowners who own and live in their homes.

Forecast Average Annual GVA Change by Industry (%), Glasgow City Region

Construction

Information and Communication

Electricity, Gas, Steam and Air Conditioning

Administrative and Support Service Activities

Professional, Scientific and Technical Activities

Human Health and Social Work Activities

Accommodation and Food Service Activities

Arts, Entertainment and Recreation

Financial and Insurance Activities

Agriculture, Forestry and Fishing

Public Administration and Defence

Transportation and Storage

Other Service Activities

Real Estate Activities

Manufacturing

Water Supply

Mining and Quarrying

Education

Wholesale and Retail Trade

Productivity¹

In this report, we have used Oxford Economics' measure of productivity, which is calculated by dividing total regional GVA by total regional employment (measured by jobs). Please note, there are different ways of calculating productivity, and caution is needed when interpreting productivity data presented in this report. It must be considered in the context of other data and insight.

Productivity in **the Glasgow City Region** was estimated to be **£49,600** in 2024. In comparison, the Scottish average was estimated to be £52,000.



Mid-term Productivity

From 2024 to 2027, productivity in the Glasgow City Region is forecast to grow by 0.6% on average each year. Over the same period, the Scottish growth rate is forecast to be 0.6%.

Glasgow City Region forecast productivity in 2027: £50,500

Scotland forecast productivity in 2027: £53,000



Long-term Productivity

From 2027 to 2034, productivity in the Glasgow City Region is forecast to grow by 1.1% on average each year. Over the same period, the Scottish growth rate is forecast to be 1.1%.

Glasgow City Region forecast productivity in 2034: £54,500

Scotland forecast productivity in 2034: £57,100



For data on productivity at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Economic Output (GVA) per Job*)

Productivity (2024)



1. SDS (2024). Oxford Economics Forecasts.

Regional Employment¹



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Workforce Size 2024: 900,400 people

The region's workforce was estimated to account for **34.2%** of Scottish employment.

Over the last 10 years (2014-2024), regional employment was estimated to have **grown** by **8.6%** (**71,500** people). In comparison, employment in Scotland increased by 3.8%.



Workforce Size 2027: 918,600 people

The region's workforce is forecast to **grow** by **2.0%** or **18,300** people between 2024 and 2027.

Compared to a Scotland-wide increase of **1.9%** or **49,800** people.



Workforce Size 2034: 938,600 people

The region's workforce is forecast to **grow** by **2.2%** or **20,000** people between 2027 and 2034.

Compared to a Scotland-wide increase of **1.2%** or **32,000** people.

Employment and forecast employment (2014-2034) (people), Glasgow City Region

	871,300	860,200	894,400	903,000 900,400	918,600	926,400	934,000	938,600
828,800		,200						
2014	201	17	2021	2024	2025 2027	2030		2034
_							1. SDS (2024). Oxford E	Economics Forecasts

For data on employment and forecast employment at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Employment Forecast*)

Employment by Industry¹

The largest employing industries in the region in 2024 (based on people) were estimated to be:

(based on people) Employment by Industry, Glasgow City Region



Human Health and Social Work Activities 154,100

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Wholesale and Retail Trade 96,800

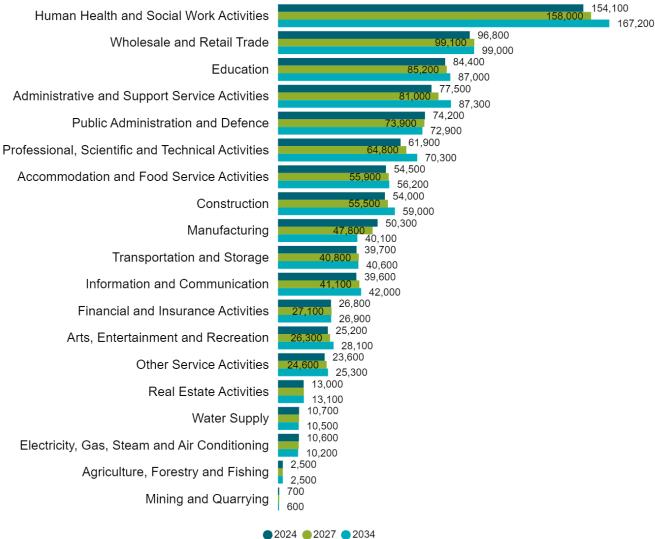


Between 2024 and 2027, employment in the region is forecast to grow, however industries will have varying performance. The greatest employment growth is forecast in Human Health and Social Work Activities, with 3,900 more people by 2027. While Manufacturing is forecast to have the greatest employment contraction (-2,500 people) in the mid-term.

Over the long-term, between 2027 and 2034, the greatest employment growth is forecast in Human Health and Social Work Activities, with 9,100 more people by 2034. While Manufacturing is forecast to have the greatest employment contraction (-7,700 people) in the long-term.

In 2024, Motion Picture, Video and Television Programme Production, Sound Recording and Music Publishing Activities was estimated to be one of the region's greatest specialism, with the percentage of employment in this industry 1.7 times greater than the Scottish average.





Figures may not sum due to rounding.

1. SDS (2024). Oxford Economics Forecasts.

Employment by Occupation¹

The largest employing occupation groups in the region in 2024 (based on people) were estimated to be:

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Elementary Occupations: Clerical and Services 84,400

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Administrative Occupations 74,100

Business and Public Service Associate Professionals
69,900

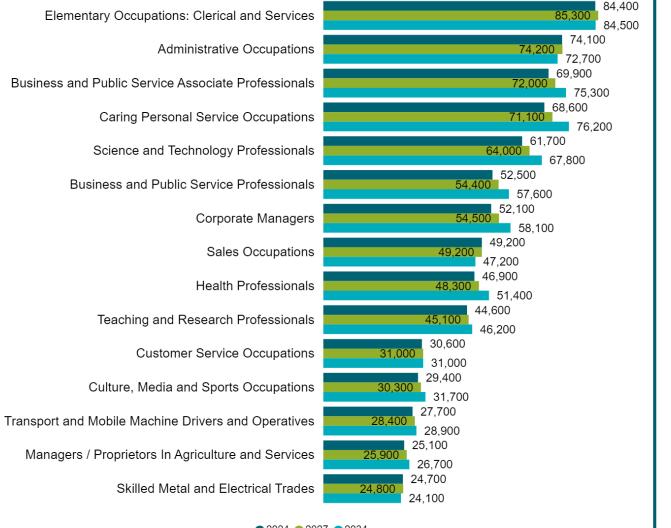
In 2024, 47.8% of employed people in the region were in 'higherlevel' occupations*, which was a lower percentage of the workforce than Scotland (49.2%). 'Mid-level' occupations accounted for 27.5% of the workforce, which was a higher percentage of the workforce than Scotland (27.0%). Around 24.7% of people were employed in 'lower-level' occupations, which was a higher percentage of the workforce than Scotland (23.8%).

Between 2024 and 2027, the greatest growth is forecast to be in Caring Personal Service Occupations (2,500 people). While Process, Plant and Machine Operatives is likely to experience the greatest contraction (-300 people).

Over the long-term between 2027 and 2034, the greatest growth is forecast to be in Caring Personal Service Occupations (5,100 people). While Sales Occupations is likely to experience the greatest contraction (-2,000 people).

Figures may not sum due to rounding.

Employment by Top 15 Occupations, Glasgow City Region



●2024 ●2027 ●2034

For data on employment by occupation at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Employment Forecast by Occupation*)

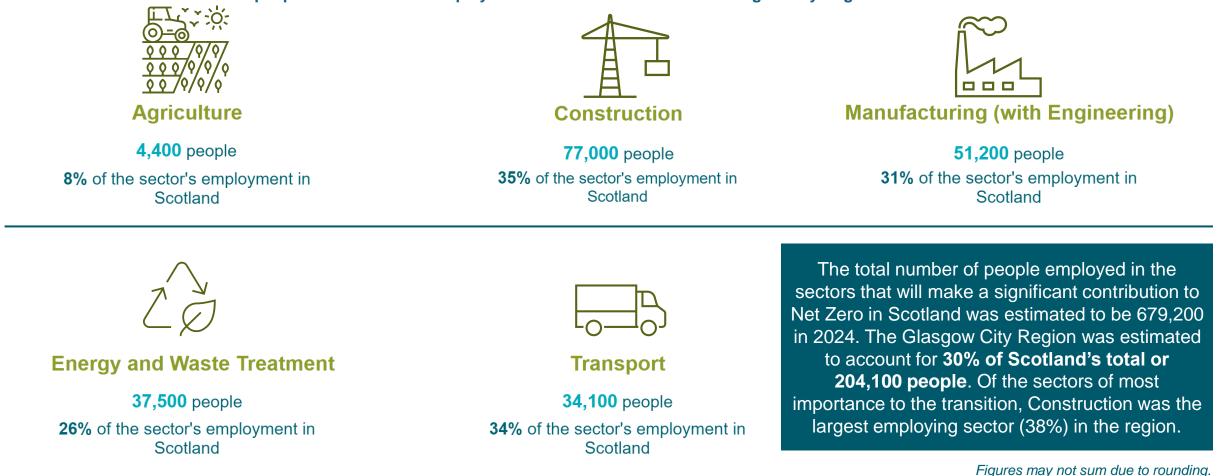
1. SDS (2024). Oxford Economics Forecasts.

* See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.

Transition to Net Zero¹

Identified as part of the Climate Emergency Skills Action Plan (CESAP), the sectors² listed below **make a significant contribution to the Transition to Net Zero** and have the greatest potential for skills implications and jobs growth arising from it. We have been able to establish the split between green jobs and non-green jobs for the Regional Outcome Agreement (ROA) areas. Green jobs in Scotland are defined by three different categories: enhanced skills and knowledge, increased demand and new and emerging.³ This section focuses on overall employment in these sectors that make a significant contribution to the Transition to Net Zero, which is the best available data for the **Glasgow City Region**. For more information, on green and non-green jobs, please see the relevant ROA reports.

Presented below are the number of people estimated to be employed in these sectors within the Glasgow City Region in 2024.



1. SDS (2024). Oxford Economics Forecasts.

2. The sectors that make a significant contribution to the Net Zero transition were identified in **the Green Jobs in Scotland report**.

Due to the methodology adopted, the footprint of sectors presented on this page differs from the industry footprint presented elsewhere in this report, and in our Sectoral Skills Assessments (SSAs). Please find a full list of the

Standard Industrial Classification (SIC) codes used to define these sectors in the Green Jobs in Scotland report (and on this page) <u>here</u>. **3.** Please see slide 12 for more information.

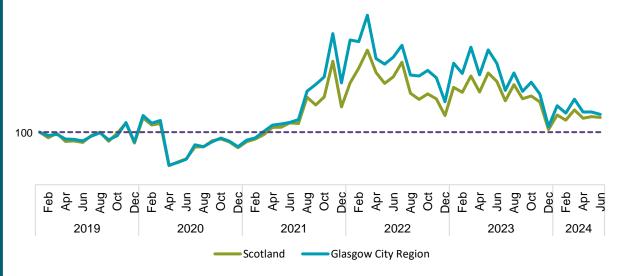
Job Postings in the Glasgow City Region¹

Online job postings data provides a useful barometer for the health of the jobs market, real-time employer demand and can indicate changing skills demands. It is important to note that the data does not capture all activity, so it should be considered as an estimate only.

The labour market has been cooling across Scotland, and job postings have declined from a peak in 2022. In the Glasgow City Region, the peak in job postings coincided with Scotland's peak in March 2022. Whilst it has cooled, the heat of the labour market in 2021 and 2022 was exceptional, and the levels of job postings across Scotland and the Glasgow City Region remain above prepandemic levels (January 2019).

In the first six months of 2024, there has been sustained demand for workers in the region. Job postings in the Glasgow City Region accounted for 34.0% of Scotland's total job postings between January and June 2024.

Index* of Job Postings, (January 2019 = 100)



Between January and June 2024, there were 84,500 job postings in the Glasgow City Region, of which: The locations with the most jobs advertised were: Motherwell Glasgow Paisley 56,900 postings 3,200 postings 2,400 postings The most requested skills and knowledge were: Management **Communications Customer Service Detail Oriented** The top job postings were: Sales Related Occupations n.e.c. 3.090 Programmers and Software Development Professionals 2,260 Care Workers and Home Carers 2,110 Cleaners and Domestics 1,980 Managers and Directors in Retail and Wholesale 1.850 Customer Service Occupations n.e.c. 1.620 Other Administrative Occupations n.e.c. 1,420 Other Registered Nursing Professionals 1,310 Kitchen and Catering Assistants 1.260 Sales and Retail Assistants 1.230 Figures may not sum due to rounding.

*An Index shows the change over time. This graph displays the data for job postings converted to a reference value. This shows the relative change for Scotland and the region over time. Over 100 indicates where there has been an increase compared to the base or reference year (in this case January 2019), whereas below 100 shows a decrease.

1. Lightcast, 2024.

Green Job Postings in the Glasgow City Region¹

The <u>Green Jobs in Scotland</u> research uses an **inclusive definition** to define green jobs.

This definition recognises that there will be an ongoing process of 'greening' across the economy due to the transition to Net Zero, and a broad range of jobs will be impacted in different ways as a result.

Green jobs can be classified into one of the following three categories:

- 1. Enhanced Skills and Knowledge: Existing occupations which will require significant change to the work and worker requirements due to green economy activities.
- 2. Increased Demand: Existing occupations which will be needed in higher numbers due to green economy activities.
- **3. New and Emerging**: New occupations which are created because of the need for unique work and worker requirements due to green economy activities.

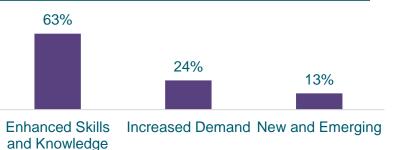
The full list of occupations (defined using Standard Occupation Classification (SOC) 2020) can be found <u>here</u>.



Out of the 84,500 job postings in the Glasgow City Region between January and June 2024, **just under half of them, 38,000, were for green jobs (44.9%)**. This was a higher proportion of green job postings than the Scottish average (42.3%). The number of green job postings in the region accounted for 36.1% of all green job postings in Scotland. The demand for green jobs in the region and Scotland peaked in 2022 before cooling. However, demand for green jobs in the region remains above the pre-pandemic level.



Between January and June 2024, **just under two thirds of green job postings** in the Glasgow City Region were for Enhanced Skills and Knowledge roles.



The green jobs in demand in each category between January and June 2024 included:

Enhanced Skills and Knowledge:



Vehicle Technicians, Mechanics and Electricians

Increased Demand:



Large Goods Vehicle Drivers

New and Emerging:



Engineering Technicians



The median advertised salary for **green jobs** in the Glasgow City Region was **£37,600*** in the first six months of 2024.

This was higher than the median advertised salary for all jobs in the region which was £31,000**.

Green job postings were prominent in the Glasgow City Region, particularly due to high employment in the Construction sector.



1. Lightcast, 2024. *Median salary based on 41% of job postings. **Median salary based on 41% of job postings.

Future Demand in the Mid-Term (2024-2027)¹

Oxford Economics' forecasts should be used as guidance only on the overall trends based on current evidence - rather than definitive numbers. There are still a wide range of factors which may impact on the labour market. It is important to note that the forecasts do not account for national or regional activities, initiatives or investments such as those mentioned in our section on Regional Insight, which are likely to influence the outlook presented. Users of the RSAs are encouraged to overlay the forecasts with their local knowledge.

Earlier in the report, we examined the future total employment in the Glasgow City Region. This part of the report focuses on the total requirement, which introduces not only employment growth or contraction but also the need to replace workers leaving the labour market due to retirement and other reasons.

The mid-term forecast suggests there could be a total requirement for **133,000** people in **the Glasgow City Region**. Between 2024 and 2027, replacement demand could create the need for **114,700** people, while **positive** expansion demand is forecast to result in **18,300 additional** workers.

In **Scotland**, there could be a total requirement for **370,800** people in the mid-term. Between 2024 and 2027, replacement demand could create the need for **321,000** people, while **positive** expansion demand is forecast to result in **49,800 additional** workers.

Figures may not sum due to rounding.



The total requirement by qualification for Glasgow City Region:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
11,900	62,000	17,400	27,600	3,700	10,300
9%	47%	13%	21%	3%	8%

The total requirement by qualification for Scotland:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
34,000	175,600	46,600	76,800	10,300	27,400
9%	47%	13%	21%	3%	7%

1. SDS (2024). Oxford Economics Forecasts.

For data on future demand at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement*)



Future Demand in the Mid-Term (2024-2027) by Industry¹

By industry, the greatest number of people are forecast to be required in:



Wholesale and Retail Trade 21,600

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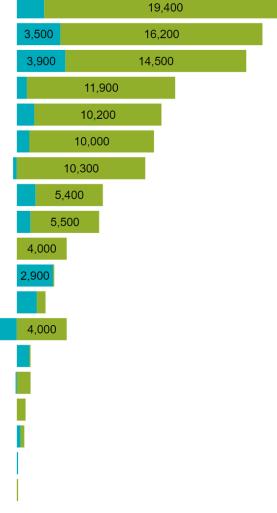
Administrative and Support Service Activities 19,700

	Human Health and Social Work Activities
7	18,400

Headline figures for each industry do not show how the composition of the industry is changing. Within industries there are changes to operating practices and consumer behaviours driven by automation, digitalisation and the transition to Net Zero. These shifts are not captured in the aggregated groups. We would encourage readers to bear this in mind when interpreting the data. For further sectoral evidence, please see our Sectoral Skills Assessments.

Forecast Total Requirement by Industry (2024-2027), Glasgow City Region

Wholesale and Retail Trade Administrative and Support Service Activities Human Health and Social Work Activities Education Accommodation and Food Service Activities Transportation and Storage Public Administration and Defence Construction Arts, Entertainment and Recreation Water Supply Professional, Scientific and Technical Activities Information and Communication Manufacturing Other Service Activities Electricity, Gas, Steam and Air Conditioning Agriculture, Forestry and Fishing Financial and Insurance Activities Real Estate Activities Mining and Quarrying



Expansion demand

Figures may not sum due to rounding.



For data on future demand by industry at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement by Industry*)

Future Demand in the Mid-Term (2024-2027) by Occupation¹

By occupation, the greatest number of people are forecast to be required in:

Elementary Occupations: Clerical and Services 18.500

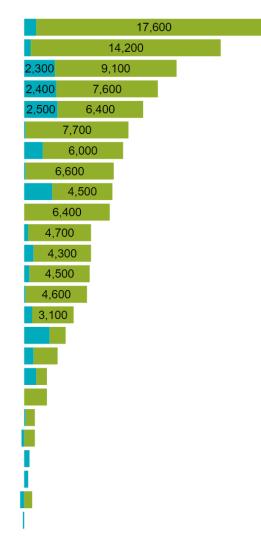
Teaching and Research Professionals 14,700

Science and Technology Professionals 11,400

As mentioned, there is forecast to be a total requirement for 133,000 people in the region over the mid-term. 'Higher-level' occupations* are forecast to account for 49.7% of this total requirement, followed by 26.1% in 'mid-level' occupations and 24.1% in 'lower-level' occupations. Across Scotland, 50.4% of total requirement will be in 'higher-level' occupations, 25.0% in 'mid-level' occupations and 24.6% in 'lower-level' occupations.

Forecast Total Requirement by Occupation (2024-2027), Glasgow City Region

Elementary Occupations: Clerical and Services Teaching and Research Professionals Science and Technology Professionals **Corporate Managers Caring Personal Service Occupations** Science and Technology Associate Professionals Health Professionals Administrative Occupations Business and Public Service Associate Professionals Sales Occupations Textiles, Printing and Other Skilled Trades Transport and Mobile Machine Drivers and Operatives Leisure and Other Personal Service Occupations Skilled Metal and Electrical Trades Skilled Construction and Building Trades Business and Public Service Professionals Managers / Proprietors In Agriculture and Services Culture, Media and Sports Occupations Elementary Occupations: Trades, Plant and Storage Skilled Agricultural Trades Protective Service Occupations Health and Social Welfare Associate Professionals **Customer Service Occupations** Process, Plant and Machine Operatives Secretarial and Related Occupations



Expansion demand

Figures may not sum due to rounding.



For data on future demand by occupation at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement by Occupation*)

1. SDS (2024). Oxford Economics Forecasts. * See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.

Future Demand in the Long-Term (2027-2034)¹

The long-term forecast is more changeable than the mid-term forecasts and could be influenced by a range of factors that are less known. It is important to note that the forecasts do not account for national or regional activities, initiatives or investments like those mentioned in our section on Regional Insight, which are likely to influence the long-term outlook presented. Oxford Economics' forecasts should be used as guidance on overall trends based on current evidence - rather than definitive numbers.

In the Glasgow City Region, the labour market forecast for the long-term (2027-2034) suggests employment is expected to grow, and there could be opportunities created as a result of the need to replace workers leaving the labour market due to retirement and other reasons.

Forecasts for the long-term suggest there could be a total requirement for **292,100** people in **the Glasgow City Region**. Between 2027 and 2034, replacement demand could create the need for **272,100** people, while **positive** expansion demand is forecast to result in **20,000 additional** workers.

In **Scotland**, there could be a total requirement for **788,900** people in the long-term. Between 2027 and 2034, replacement demand could create the need for **756,900** people, while **positive** expansion demand is forecast to result in **32,000 additional** workers.

Figures may not sum due to rounding.

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SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
24,600	137,000	36,300	66,900	5,100	22,100
8%	47%	12%	23%	2%	8%

The total requirement by qualification for **Scotland**:

SCQF 11-12	SCQF 7-10	SCQF 6	SCQF 5	SCQF 1-4	No qualifications
67,300	378,500	93,400	180,300	12,100	57,200
9%	48%	12%	23%	2%	7%

1. SDS (2024). Oxford Economics Forecasts.

For data on future demand at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement*)

Future Demand in the Long-Term (2027-2034) by Industry¹

By industry, the greatest number of people are forecast to be required in:



Administrative and Support Service Activities 46,700



Wholesale and Retail Trade 45,100

	Human Health and Social Work Activities
	44,400

The mid-term forecast analysis indicated that some industries are experiencing a shift in their operational practices, and this trend is expected to continue in the long term.

Administrative and Support Service Activities 6,200 Wholesale and Retail Trade Human Health and Social Work Activities 9,100 Education Accommodation and Food Service Activities 24.000 23,900 Public Administration and Defence Transportation and Storage Construction Arts, Entertainment and Recreation Water Supply 9,100 Professional, Scientific and Technical Activities Information and Communication Electricity, Gas, Steam and Air Conditioning Agriculture, Forestry and Fishing Other Service Activities **Financial and Insurance Activities** Manufacturing -7,700 8,100 Mining and Quarrying

Real Estate Activities

Expansion demand

Forecast Total Requirement by Industry (2027-2034), Glasgow City Region

22,900 13,100 13,600

40,500

35.200

45,200

28,600

Figures may not sum due to rounding.



For data on future demand by industry at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement by Industry*)

1. SDS (2024). Oxford Economics Forecasts.

Future Demand in the Long-Term (2027-2034) by Occupation¹

By occupation, the greatest number of people are forecast to be required in:

Ŀ	

Elementary Occupations: Clerical and Services 39,700

1	

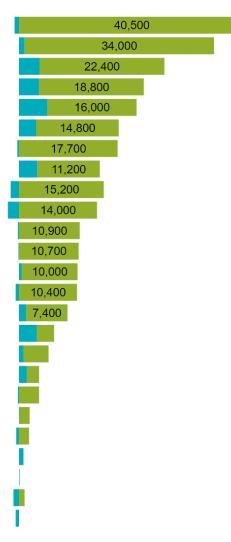
Teaching and Research Professionals 35,100

Science and Technology Professionals 26,100
26,100

There is forecast to be a total requirement for 292,100 people in the region over the long-term. 'Higher-level' occupations* are forecast to account for 51.6% of this total requirement, followed by 26.0% in 'mid-level' occupations and 22.5% in 'lower-level' occupations. Across Scotland, 52.4% of total requirement will be in 'higher-level' occupations, 24.7% in 'mid-level' occupations and 22.9% in 'lower-level' occupations.

Forecast Total Requirement by Occupation (2027-2034), Glasgow City Region

Elementary Occupations: Clerical and Services Teaching and Research Professionals Science and Technology Professionals **Corporate Managers Caring Personal Service Occupations** Health Professionals Science and Technology Associate Professionals Business and Public Service Associate Professionals Administrative Occupations Sales Occupations Textiles, Printing and Other Skilled Trades Leisure and Other Personal Service Occupations Transport and Mobile Machine Drivers and Operatives Skilled Metal and Electrical Trades Skilled Construction and Building Trades **Business and Public Service Professionals** Managers / Proprietors In Agriculture and Services Culture, Media and Sports Occupations Elementary Occupations: Trades, Plant and Storage Skilled Agricultural Trades **Protective Service Occupations** Health and Social Welfare Associate Professionals **Customer Service Occupations** Process, Plant and Machine Operatives Secretarial and Related Occupations



Expansion demand

Figures may not sum due to rounding.



For data on future demand by occupation at local authority level please see the Data Matrix. (*Theme: Skills Demand; Topic: Total Requirement by Occupation*)

 SDS (2024). Oxford Economics Forecasts.
* See RSA Technical Note (2024) for an explanation of what is defined as 'high-level', 'mid-level' and 'low-level' occupations.



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