

London

Cogent in the Region

- The Cogent workforce accounts for **12% of the manufacturing workforce** and **9% of manufacturing employers** in the region.
- The Cogent industries account for **4% of regions GVA** and **contribute of the order of £9.2bn** into the regional economy.
- **6% of employers** and **5% of Cogent employees are based in London**, however this includes a large proportion of registered headquarters and the retail sale of automotive fuels.

The region has a dominant cluster of Cogent industries:

Employment within the region is centred on company headquarter activities although fore-court retail is the predominant sectoral employer and accordingly London shows the highest proportion of micro employers of all areas of the country.

London has the most ethnically diverse workforce for the sector in the UK with 16% of the workforce being non-white compared to 8% for the overall Cogent-UK sector workforce. The region also shows a higher proportion of women employed in the sector.



Economic and Employment Update ^{1,4,5,6}

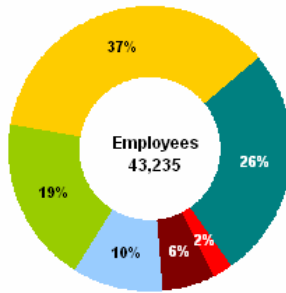
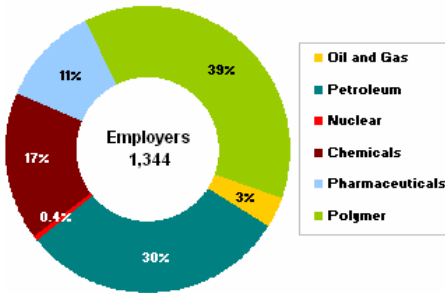
Industry	Weekly Pay-Gross ⁴	Employers	% of UK Total	Employees	% of UK Total
	Median/£	n	%	n	%
Oil and Gas	1,577	45	7%	15,600	6%
Petroleum	*	408	8%	11,364	8%
Nuclear	*	5	2%	976	2%
Chemicals	577	224	7%	2,741	2%
Pharmaceuticals	843	153	10%	4,420	6%
Polymer	503	509	4%	8,134	4%
London- Cogent	-	1,344	6%	43,235	5%
London- Region	678	401,209	16%	4,168,527	16%

Cogent - UK Headlines

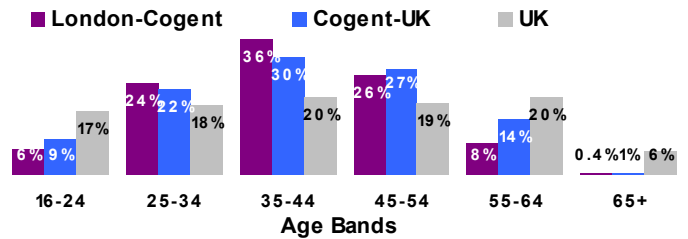
- £ 201bn Turnover
- £ 65.5bn GVA
- 7.1% of UK GVA
- 900,000 employees
- 23,000 employers
- 14% of UK manufacturing workforce
- 12% of UK manufacturing enterprises

The Workforce

Employers and Employees ^{5,6}(direct and indirect)



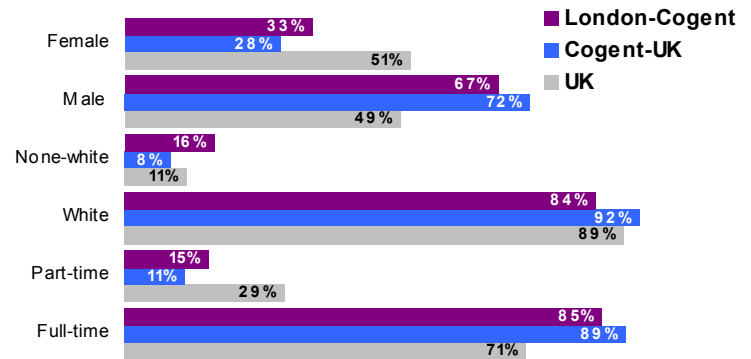
Age Profile³



Employers by Sizeband¹

	Employees			
	1-10	11-49	50-199	200+
London-Cogent	74%	22%	4%	1%
Cogent-Great Britain	68%	23%	7%	2%
London-Region	87%	9%	3%	1%

Workforce Distribution— Gender¹, Ethnicity³ and Employment Profile³



1. Annual Business Enquiry (ABI) 2008-data released June 2010, Office of National Statistics (ONS) 2010

2. National Employers Skills Survey (NESS) 2009

3. Labour Force Survey (LFS) 2009, ESDS 2010

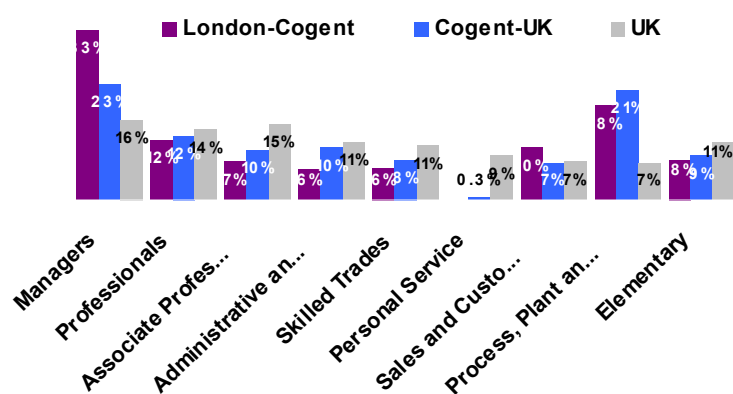
4. Annual Survey of Hours and Earnings 2009

* Data suppressed— ONS 2010

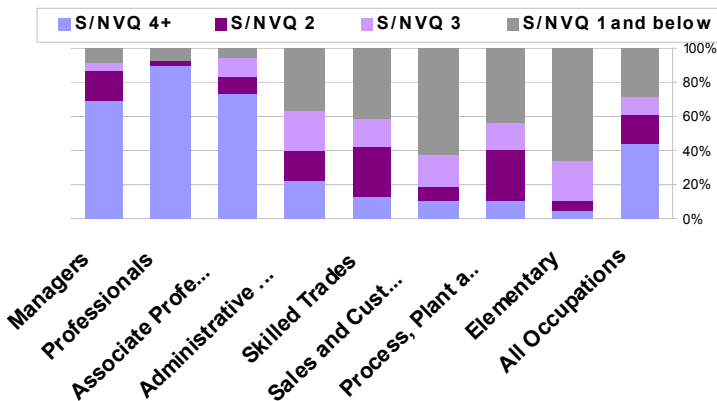
** GVA - Gross value added (GVA) represents the amount that individual businesses, industries or sectors contribute to the economy.

Occupational Distribution, Skill Level and Skills Needs

Occupational Distribution³



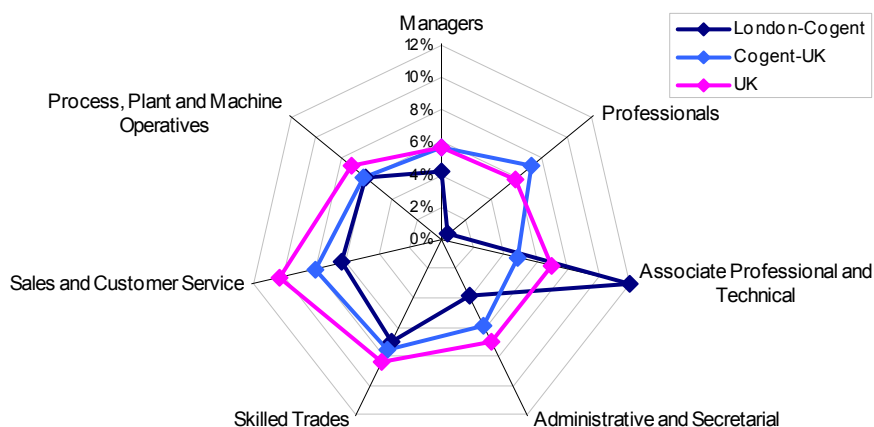
Skill Level by Occupation³



Skills Gaps²

	% of firms reporting skills gaps	% of staff with skills gap
Oil and Gas	18%	2%
Petroleum	25%	5%
Chemicals	24%	3%
Pharmaceuticals	32%	3%
Polymer	15%	5%
London- Cogent	23%	5%
London- Region	17%	7%

Skills Gap by Occupation²



Skills Demand and Training²

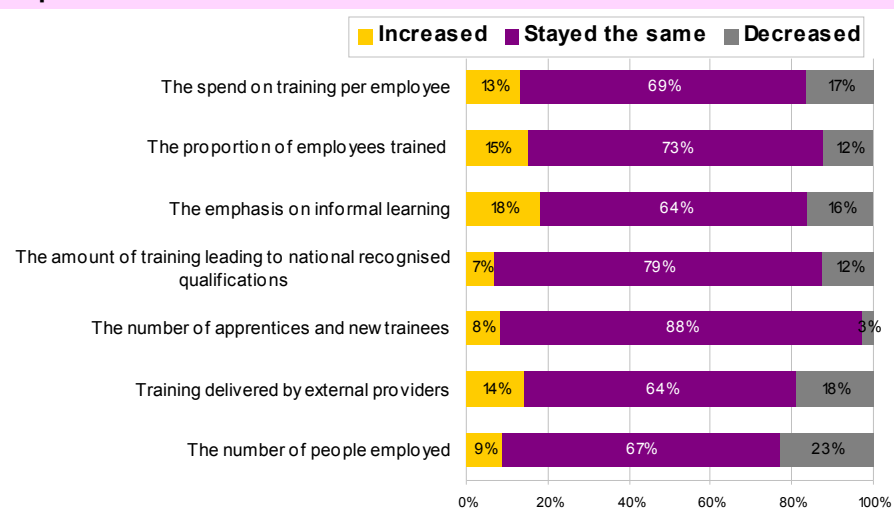
- The proportion of companies reporting vacancies decreased by 4%, but internal skills gaps increased by 11% in 2009 from 2007.
- The proportion of employers reporting skills gap is higher than the national average by 4%.
- The proportion of employers providing training gone up by 5%, however workforce trained fell by 29% in the 2009 from 2007.

	Lon-Cogent		England	
	2007	2009	2007	2009
Proportion of firms reporting vacancies	9%	5%	18%	12%
Proportion of firms reporting 'hard-to-fill' vacancies	5%	1%	8%	3%
Proportion of firms reporting a skills shortage vacancy	3%	1%	6%	2%
Proportion of firms reporting internal skills gaps	12%	23%	16%	19%
Proportion of firms providing training (last 12 months)	62%	67%	67%	67%
Proportion of workforce trained (last 12 months)	74%	45%	68%	56%

Training by Industry² (last 12 months)

	% of firms provided training	% of staff trained
Oil and Gas	83%	60%
Petroleum	71%	53%
Chemicals	54%	9%
Pharmaceuticals	76%	26%
Polymer	52%	35%
London- Cogent	67%	45%
London- Region	65%	54%

Impact of Recession²



5. Cogent Industry Estimate- (estimated from national data, ABI, LFS, NESS, BIS..etc)
 6. Power People: Civil Nuclear Workforce 2009-2025, Cogent Standard Industrial Classification (SIC 07 code), ONS 2010

More information on Regional and Industry Research can be found at:
www.cogent-ssc.com/research