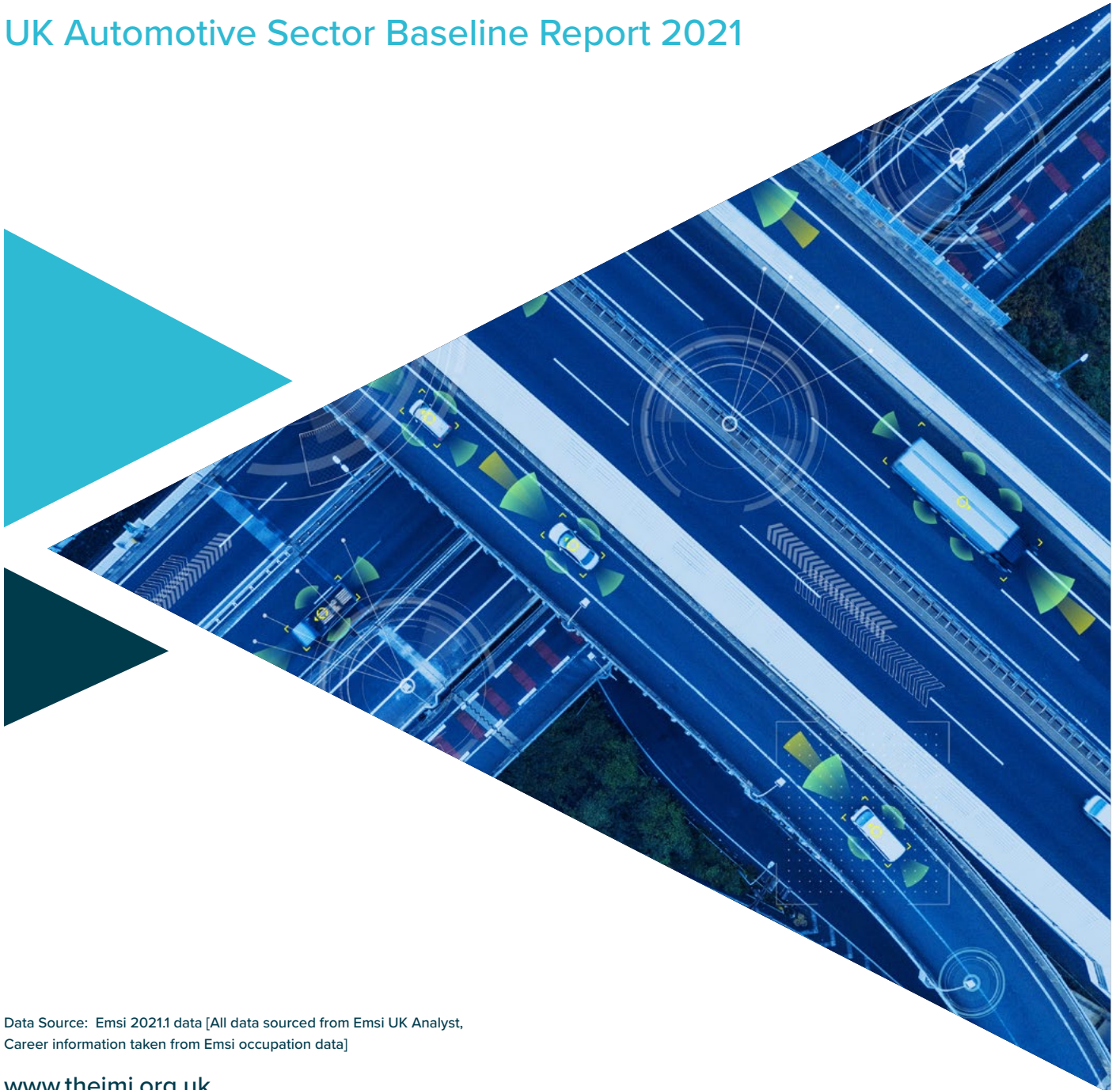




INSTITUTE OF THE
MOTOR INDUSTRY

Creating long-lasting careers in a changing sector

UK Automotive Sector Baseline Report 2021



Data Source: Emsi 2021.1 data [All data sourced from Emsi UK Analyst,
Career information taken from Emsi occupation data]

www.theimi.org.uk

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EXECUTIVE SUMMARY

Key statistics

846,100

Jobs in the Automotive sector

81%

of 846,100 jobs are within the automotive retail sectors, 19% are automotive manufacturing



97,000

Establishments (businesses) in the sector

£36,052,000,000

Worth £36 billion Gross value added (GVA) to the UK economy



2.6%

The sector contributes 2.6% of the UK economy



38%

of the automotive sector is aged under 35



81%

of the automotive sector are male



153,000

new jobs in the sector in the past 10 years



226

occupations in the sector



55,000

forecast additional jobs in the sector by 2030

INTRODUCTION

Our history

Founded in 1920, just after the 1st World War ended, at a time when horse and cart were being phased out and Henry Ford was pushing forward with pioneering assembly lines and mass production, the Institute of the Motor Industry (IMI) was created. With such radical changes and aspirations of a changing world of automotive afoot, the IMI established themselves as the first automotive industry body in the UK, born from a need to educate and train people working in an emerging automotive industry.



INSTITUTE OF THE MOTOR INDUSTRY

The role of the IMI

As a professional body, the IMI is dedicated to the advancement of the automotive sector which covers many different sub-sectors and occupations.

We believe that the automotive sector is a driver of innovation, employment and economic growth. People working in the sector need the most relevant, up-to-date skills and qualifications in order to progress – especially during times of intense change. The IMI's purpose is to provide, and continually evolve, the means by which people working in the automotive sector can attain relevant, professional competence and appropriate recognition.

We do this in three key areas:

PROMOTE

- Promotion of automotive as a first career choice (eg schools resources, careers activities, skills competitions)

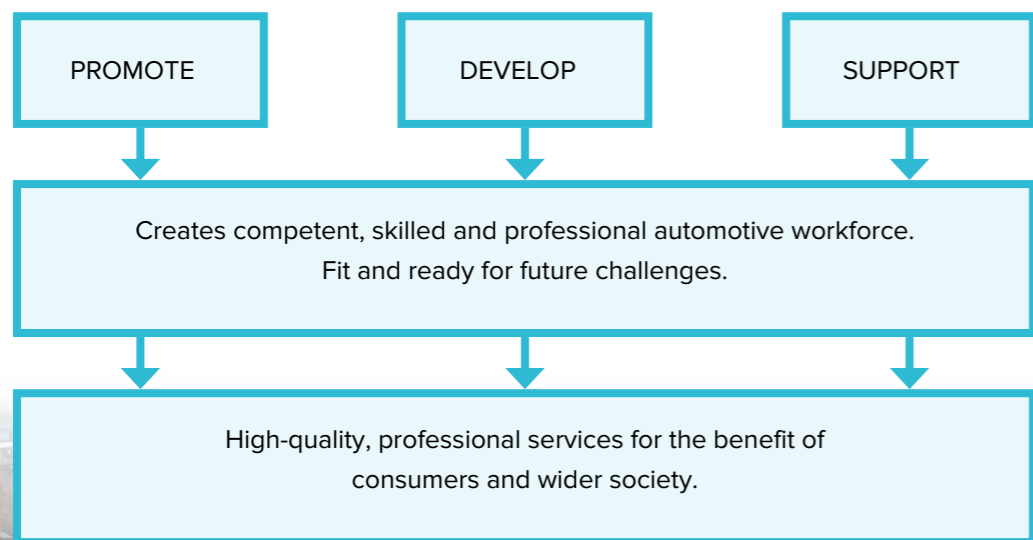
DEVELOP (skills)

- Equipping new entrants to the sector with the skills and competence to be effective (eg apprenticeships, qualifications)
- Advancement of knowledge and skills of the workforce (eg e-learning, accreditations qualifications, apprenticeships)
- Required to adopt continuous professional development

SUPPORT

- Providing professional credentials (eg post-Nominal letters, professional registration)
- Promoting and overseeing adherence to professional standards for technical and ethical competence
- Careers advice, lifestyle and professional tools and benefits

We do all of this to create and maintain a future-proof professional automotive workforce thereby securing a high-quality professional service for consumers.



Forging careers in a changing sector

The IMI has placed growing emphasis on learning, ensuring that individuals, independent and global businesses all play their part in future-proofing the sector, ensuring that the right skills are held at the right time and in many instances, ahead of time, particularly now when the sector is heading towards a huge transformation with petrol, diesel and hybrid vehicles becoming fewer and, EV and Hydrogen coming in.

With a growing focus on everything ADAS, EV and Hydrogen there is an increasing need to ensure technical specialists are skilled and up-to-date when it comes to maintenance and repair but, there is also a need for managers and leaders to be knowledgeable and confident to take their teams through significant change, as well as filling roles to ensure the infrastructure is established and ready to accommodate change.

For all of these things, we need people and we are working hard to attract a more diverse and inclusive workforce in the sector. To inspire people into automotive – a sector that creates long lasting careers and is suitable for young, old, experienced and new and gender diverse – a sector that does not discriminate.

Inspiring the future workforce

We believe that the industry is a driver of innovation, employment and economic growth. People working in the industry need the most relevant, up-to-date skills and qualifications in order to progress – especially during times of intense change. The IMI’s purpose is to provide, and continuously evolve, the means by which people working in the automotive sector can attain relevant professional competence and appropriate recognition.

It continues to see truly inspiring developments, exciting change and sustainable growth in both personal and public transportation. It’s an industry with a range of roles, much broader than just the obvious technical jobs, and it’s an excellent place to build a secure career that brings change and excitement.

A summary of the automotive labour market

The content of the report is generated from Emsi data, which gives a view of industry occupations in: England, Scotland, Wales and Northern Ireland. Data is updated annually, so the most recent full year is 2020.

Emsi data gives us a full, contextualised view of the labour market, covering all 563 industry and 369 occupation classifications across all regions of the country, which has enabled us to examine the automotive sector through both a subsector (industry) and occupation lens. The report outlines historical trends, skills demand and, seeks to predict some future trends for the sector. This means that we are able to drill down to the most specific (SIC and SOC), at National, Government Office Region, County/Unitary Authority and Local Authority levels.

In addition, staffing patterns allow us to see the occupational make up of any industry for any area, whilst staffing patterns allow us to pick any occupation and identify the industries that employ people in this role. The data is created from a collection of nine Government sources, and describes labour market conditions across Britain. For the purpose of this report, we have used Government Office Region for regional analysis.

All data used within this report is referenced to Emsi 2021.1 data sourced from Emsi UK Analyst

DEFINING THE LABOUR MARKET

Locating the labour market

Automotive Retail			
SIC	Description	2020 Jobs	2020 Establishments
4511	Sale of Cars and Light Motor Vehicles	211,040	21,583
4519	Sale of Other Motor Vehicles	16,779	1,517
4520	Maintenance and Repair of Motor Vehicles	268,785	50,326
4531	Wholesale Trade of Motor Vehicle Parts and Accessories	74,123	6,070
4532	Retail Trade of Motor Vehicle Parts and Accessories	42,473	5,847
4540	Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories	11,481	2,147
4677	Wholesale of Waste and Scrap *** automotive occupations only	6,354	855
7711	Renting and Leasing of Cars and Light Motor Vehicles	42,464	4,723
7712	Renting and Leasing of Trucks	9,227	959
		682,727	94,028

Automotive Manufacturing			
SIC	Description	2020 Jobs	2020 Establishments
2910	Manufacture of Motor Vehicles	80,794	905
2920	Manufacture of Bodies (Coachwork) for Motor Vehicles; Manufacture of Trailers and Semi-trailers	20,657	731
2931	Manufacture of Electrical and Electronic Equipment for Motor Vehicles	2,568	112
2932	Manufacture of Other Parts and Accessories for Motor Vehicles	57,698	1437
3091	Manufacture of Motorcycles	1,655	54
		163,373	3240

Specific Automotive Occupations			
SOC	Description	2020 Jobs	Median Wages
1252	Garage Managers and Proprietors	25,285	£29,666
5231	Vehicle Technicians, Mechanics and Electricians	186,871	£25,431
5232	Vehicle Body Builders and Repairers	24,786	£25,367
5234	Vehicle Paint Technicians	12,771	£25,940
7115	Vehicle and Parts Salespersons and Advisers	56,938	£20,049
8132	Assemblers (Vehicles and Metal Goods)	44,897	£29,830
8135	Tyre, Exhaust and Windscreen Fitters	13,512	£20,843
9236	Vehicle Valeters and Cleaners	33,705	£17,664
		398,765	

682,727

jobs in the automotive retail sector

103,194

automotive occupations outside of automotive retail and manufacturing

163,373

jobs in automotive manufacturing sector

The sectors where those in Automotive occupations are working outside of the Automotive sector include:

- maintaining and repairing fleet vehicles for retail and other freight services
- maintaining and repairing emergency vehicles
- maintaining and repairing military land based vehicles

846,100

Total number working in the automotive sector

398,765

employed in automotive occupations

25% (103,194)

employed outside of automotive retail and manufacturing sectors

Industry Subsectors (Retail) Part 1

Sale of Cars and Light Motor Vehicles (4511)

Wholesale and retail sale of new vehicles including: passenger motor vehicles, specialised passenger motor vehicles such as ambulances and minibuses and wholesale and retail sales of off-road motor vehicles.



Maintenance and Repair of Motor Vehicles (4520)

Maintenance and repair of motor vehicles includes: mechanical repairs, electrical repairs, electronic injection systems repair, ordinary servicing, bodywork repair, repair of motor vehicle parts, repair of screens and windows, spraying and painting, tyre and tube repair, fitting or replacement and installation of parts and accessories.



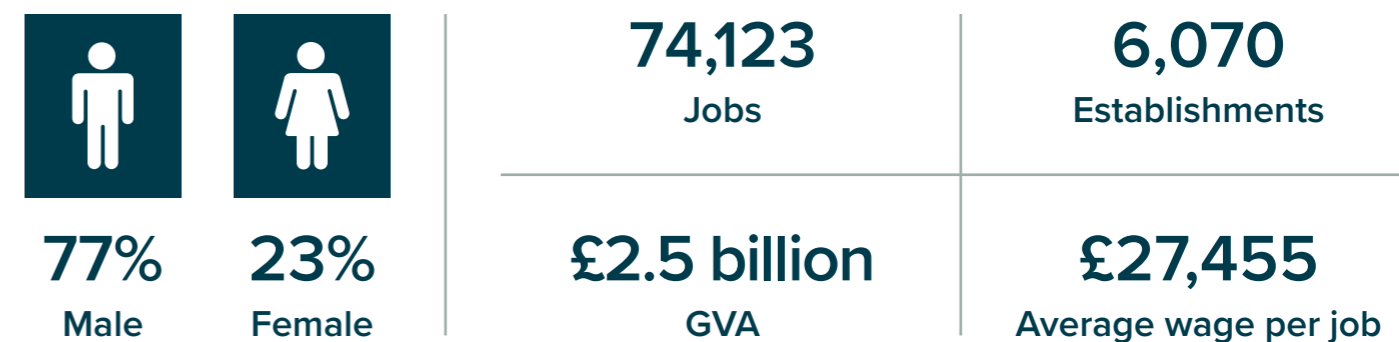
Sale of Other Motor Vehicles (4519)

Wholesale and retail sale of new and used vehicles including: lorries, trailers and semi-trailers, camping vehicles as well as wholesale and retail sale of off-road motor vehicles (of a weight exceeding 3.5 tonnes).



Wholesale Trade of Motor Vehicle Parts and Accessories (4531)

Wholesale trade of parts, components, supplies, tools and accessories for motor vehicles including: tyres, spark plugs, batteries, lighting equipment and electrical parts.



Industry Subsectors (Retail) Part 2

Retail Trade of Motor Vehicle Parts and Accessories (4532)

Retail trade of all parts including components, supplies and tools and accessories for motor vehicles such as tyres, spark plugs, batteries, lighting equipment and electrical parts.



Renting and Leasing of Cars and Light Motor Vehicles (7711)

Renting and leasing of cars and light motor vehicles including renting and operational leasing of passenger cars, and other light motor vehicles (of a weight not exceeding 3.5 tonnes) without driver.



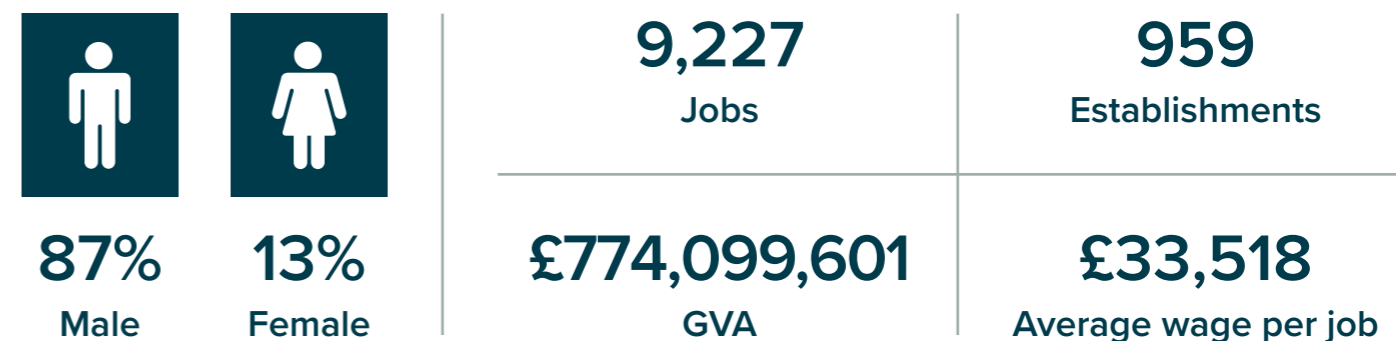
Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories (4540)

Wholesale and retail sale of motorcycles including mopeds, parts and accessories for motorcycles, and maintenance and repair of motorcycles.

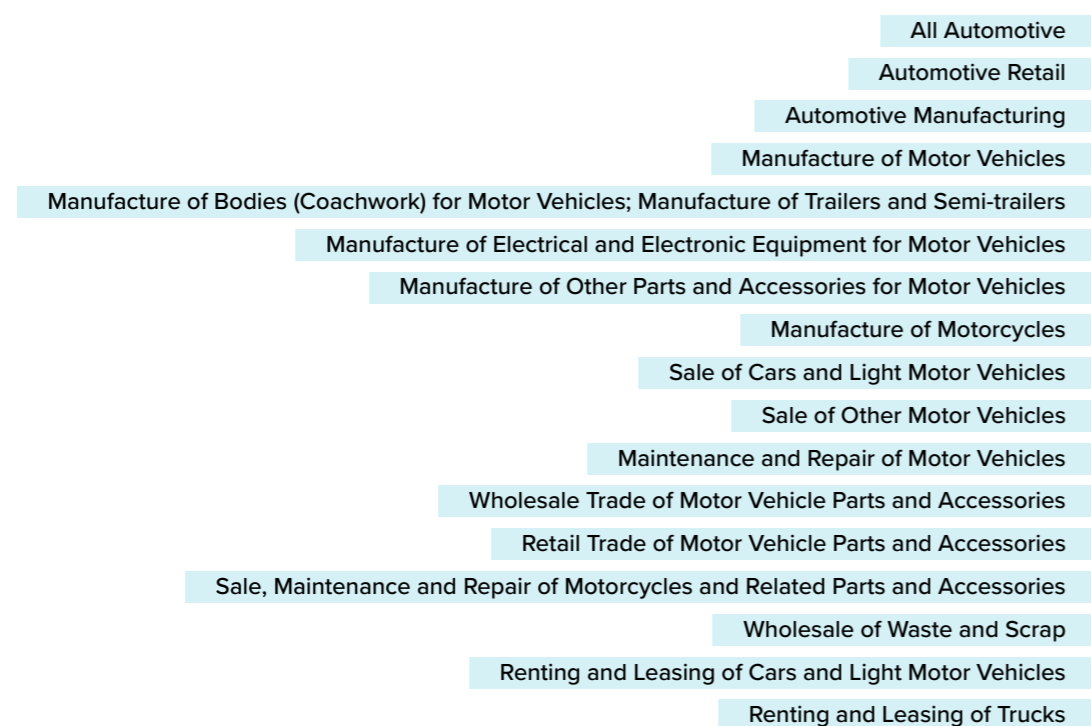


Renting and Leasing of Trucks (7712)

Renting and leasing of trucks including the renting and operational leasing of trucks, utility trailers and heavy motor vehicles (of a weight exceeding 3.5 tonnes) and recreational vehicles.

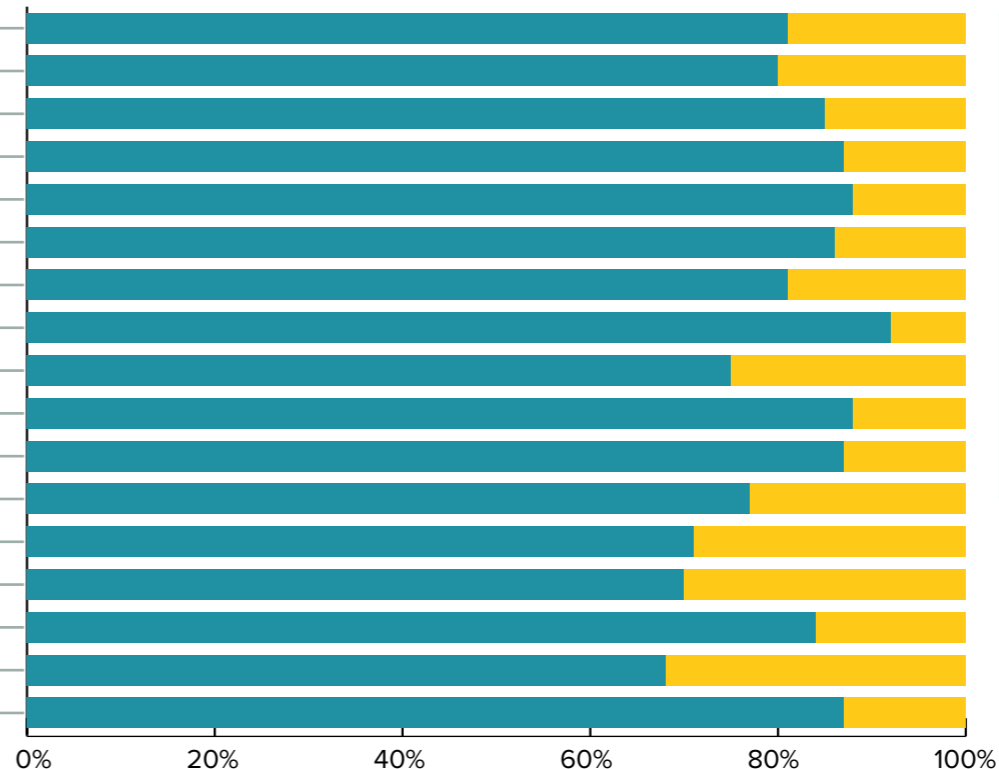


Demographics of the sector



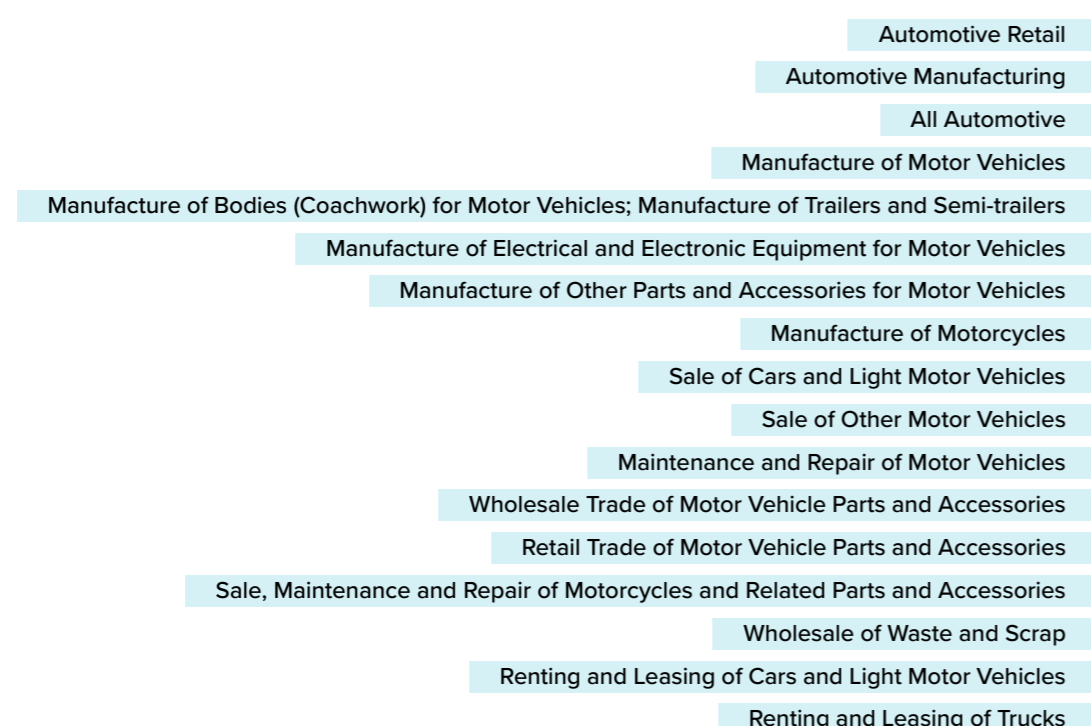
81% of the sector is male. The subsector with the largest proportion of males (92%) is the manufacture of motorcycles and renting and leasing of cars. The light motor vehicles has the highest proportion of females at 32%.

Gender



Male
Female

Age Profile



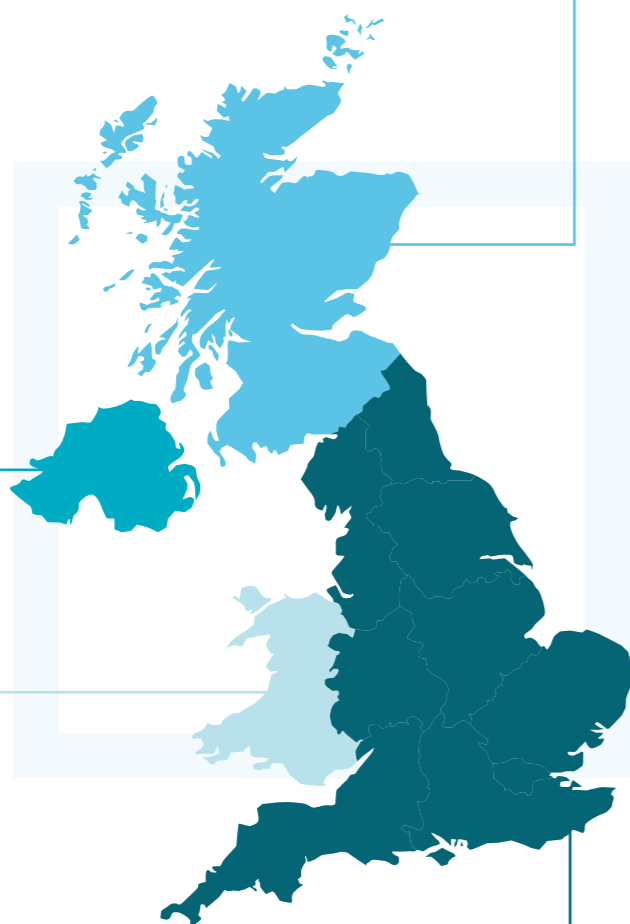
38% of the automotive sector is aged under 35 and 18% is over the age of 55. The subsector with the youngest profile is the manufacture of motorcycles, where 48% of the subsector is under 35. The sale of other motor vehicles has the oldest profile with 26% of the sector over 55.



Regional Profile

Northern Ireland	2020 Jobs	2020 Establishments	Avg. Wages Per Job
Retail	17,143	3,097	£24,487
Manufacturing	3,835	113	£24,795
	20,978	3,210	

Scotland	2020 Jobs	2020 Establishments	Avg. Wages Per Job
Retail	53,369	6,024	£26,682
Manufacturing	11,001	147	£28,185
	64,370	6,171	



86% of the automotive sector is based in England

Average wages in England are higher than in the other 3 nations. Average wages in automotive manufacturing are higher than retail in all 4 nations.

Wales	2020 Jobs	2020 Establishments	Avg. Wages Per Job
Retail	34,893	4,464	£26,155
Manufacturing	2,926	79	£34,512
	37,820	4,543	

England	2020 Jobs	2020 Establishments	Avg. Wages Per Job
Retail	582,940	81,203	£28,999
Manufacturing	145,610	2,900	£39,182
	728,550	84,103	

Automotive Retail - Regions		
Region	2020 Jobs	2020 Location Quotient
South East	111,415	1.20
North West	81,659	1.09
East of England	77,104	1.25
West Midlands	73,910	1.29
South West	61,083	1.08
London	60,870	0.52
Scotland	53,369	0.97
Yorkshire and The Humber	51,481	0.96
East Midlands	45,853	0.98
Wales	34,893	1.21
North East	19,565	0.83
Northern Ireland	17,143	0.83
	688,346	

16% (111,415) of the retail automotive sector is based in the South East

The location quotient is a way of quantifying how concentrated a particular industry or sector is compared to the nation. Numbers greater than 1 indicate the sector has a larger than average share of jobs in the region.

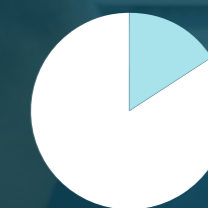
The West Midlands has the highest location quotient indicating greater prevalence of retail automotive jobs in the region.



Occupations in sector

Top 20 occupations in automotive sector

SOC	Description	2020 Jobs
5231	Vehicle Technicians, Mechanics and Electricians	134,767
7115	Vehicle and Parts Salespersons and Advisers	48,716
8212	Van Drivers	26,982
4159	Other Administrative Occupations n.e.c.	26,573
3545	Sales Accounts and Business Development Managers	26,432
5223	Metal Working Production and Maintenance Fitters	25,722
9236	Vehicle Valeters and Cleaners	24,101
8132	Assemblers (Vehicles and Metal Goods)	22,087
5232	Vehicle Body Builders and Repairers	21,316
9260	Elementary Storage Occupations	20,622
1252	Garage Managers and Proprietors	20,543
4122	Book-keepers, Payroll Managers and Wages Clerks	20,422
7111	Sales and Retail Assistants	19,435
4216	Receptionists	18,742
1190	Managers and Directors in Retail and Wholesale	18,496
8214	Taxi and Cab Drivers and Chauffeurs	14,454
8135	Tyre, Exhaust and Windscreen Fitters	12,702
7219	Customer Service Occupations n.e.c.	11,245
5234	Vehicle Paint Technicians	10,838
4151	Sales Administrators	10,578



Vehicle Technicians, Mechanics and Electricians (16% of the jobs in the sector)

The occupations with the largest number of jobs in the industry are vehicle technicians, mechanics and electricians (134,767), these are 16% of jobs in the sector. The second highest are vehicle parts sales persons and advisers (48,716) or 6% of the industry. 63% of the industry are in the top 20 occupations.

There is significant diversity within the industry in terms of occupations. There are 226 occupations in the Automotive sector, for example, 20,422 book keepers.

There are 8 Automotive occupations (highlighted in blue) which can be assumed are working in or directly supporting the industry. They include manufacturing, maintaining, or selling vehicles.

Specific Automotive Occupations Part 1

Vehicle Technicians, Mechanics and Electricians (5231)

Employed in the Automotive sector	134,767
Employed outside	52,104
Total	186,871

27%
Over 55

186,871
Jobs

Level 3 NVQ; A Levels
Education level

Exposure index 18

Technicians have an exposure index of 18 which places it in the bottom quarter of those effected by the pandemic.



Vehicle Valeters and Cleaners (9236)

Employed in the Automotive sector	24,101
Employed outside	9,604
Total	33,705

14%
Over 55

33,705
Jobs

**Level 1 NVQ;
GCSE at grades D-G**
Education level

Exposure index 22

Vehicle valeters have an exposure index of 22 which places it in the bottom half of those effected by the pandemic.



Exposure index:

The Exposure index is a measure of which jobs have been exposed to the disruptions caused by the COVID-19 pandemic and lockdown restrictions. The higher the number the greater the exposure, the current scores are between 0 and 89.

Vehicle and Parts Salespersons and Advisers (7115)

Employed in the Automotive sector	48,716
Employed outside	8,223
Total	56,938

16%
Over 55

56,938
Jobs

Level 3 NVQ; A Levels
Education level

Exposure index 35

Vehicle and parts salespersons have an exposure index of 35, which places it in the top half of occupations effected by COVID-19. It is the 2nd highest score of the 8 specific Automotive occupations.



Assemblers (Vehicles and Metal Goods) (8132)

Employed in the Automotive sector	22,087
Employed outside	22,810
Total	44,897

14%
Over 55

44,897
Jobs

**Level 2 NVQ;
GCSE at grades A*-C**
Education level

Exposure index 22

Vehicle assemblers have an exposure index of 45 which places it in the top quarter or all of occupations effected by COVID-19. It is the highest scoring of the 8 specific Automotive occupations.



Specific Automotive Occupations Part 2

Vehicle Body Builders and Repairers (5232)

Employed in the Automotive sector	21,316
Employed outside	3,470
Total	24,786

23% Over 55 | **24,786 Jobs** | **Level 3 NVQ; A Levels Education level**

Exposure index 22

Body builders and repairers have an exposure index of 22 which places it in the bottom half of those effected by the pandemic.



Tyre, Exhaust and Windscreen Fitters (8135)

Employed in the Automotive sector	12,702
Employed outside	810
Total	13,512

4% Over 55 | **13,512 Jobs** | **Level 2 NVQ; GCSE at grades A*-C Education level**

Exposure index 18

Fitters have an exposure index of 18 which places it in the bottom quarter of those effected by the pandemic.



Exposure index:

The Exposure index is a measure of which jobs have been exposed to the disruptions caused by the COVID-19 pandemic and lockdown restrictions. The higher the number, the greater the exposure; the current scores range between 0 and 89.

Garage Managers and Proprietors (1252)

Employed in the Automotive sector	20,543
Employed outside	4,742
Total	25,285

27% Over 55 | **25,285 Jobs** | **Level 3 NVQ; A Levels Education level**

Exposure index 17

Technicians have an exposure index of 17 which places it in the bottom quarter of those effected by the pandemic.



Vehicle Paint Technicians (5234)

Employed in the Automotive sector	10,838
Employed outside	1,932
Total	12,771

7% Over 55 | **12,771 Jobs** | **Level 3 NVQ; A Levels Education level**

Exposure index 21

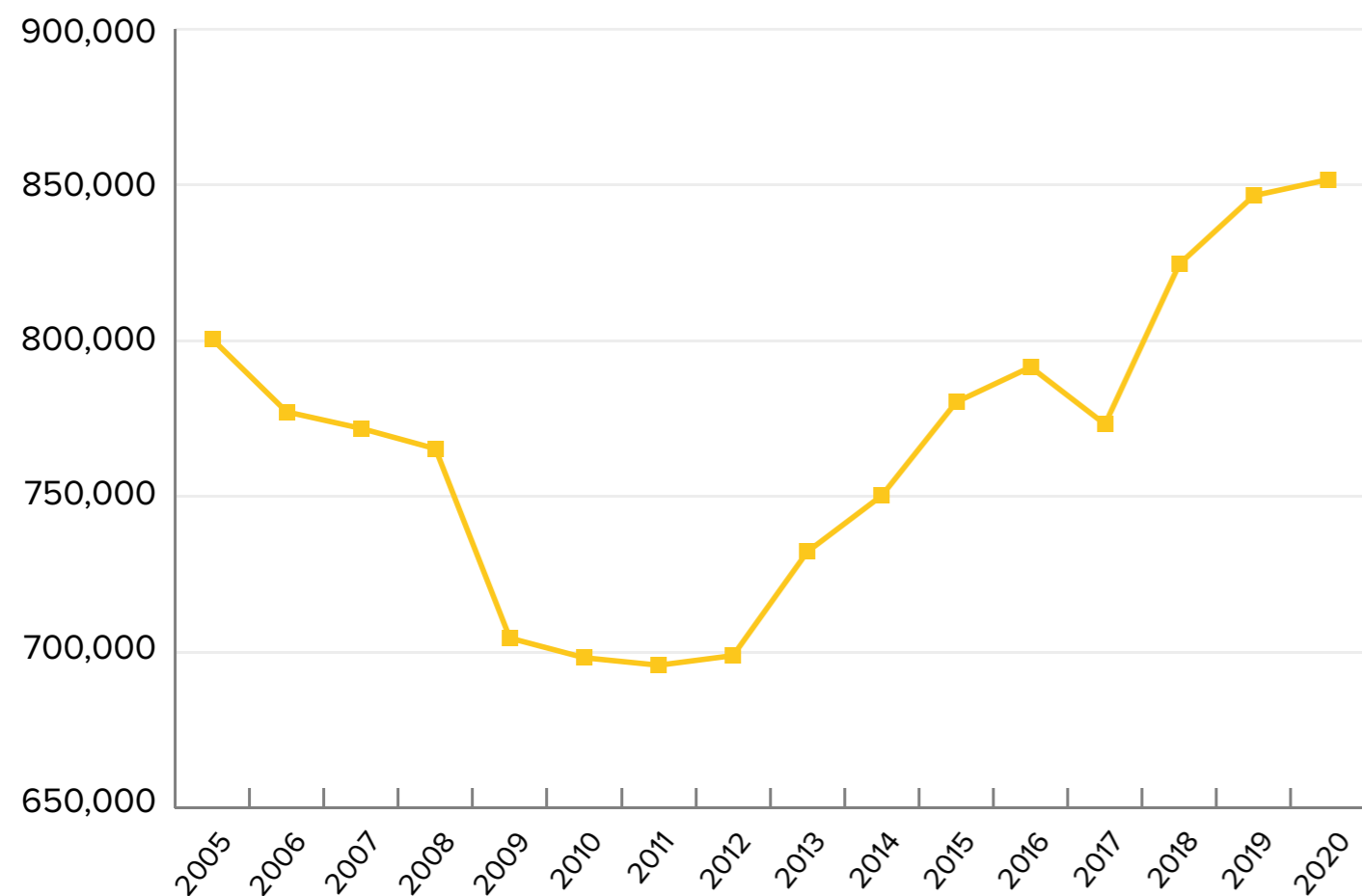
Vehicle paint technicians have an exposure index of 21 which places it in the bottom half of those effected by the pandemic.



THE CHANGING PICTURE

Industry Trends

The number of jobs in the automotive sector over time (2005-2020)



Includes those in both retail and manufacturing sub-sectors.

The sector has seen robust growth in the past 10 years, with an average of a 1.8% increase year on year. This has led to the creation of 153,500 new jobs in the sector.

The COVID-19 pandemic has had some effect on job numbers in the past year with growth slowing to 0.6%.

The subsectors which have seen the biggest increase in past 10 years were: renting and leasing of cars and trucks and, the sales of other vehicles.



**ROBUST
GROWTH IN THE
PAST 10 YEARS**

153,500
new jobs in the
automotive sector
in the past 10 years

1.8%
average growth
year on year

0.6%
growth in
the past year

New Jobs

Top 5 occupations contributing to new jobs

Vehicle Technicians, Mechanics and Electricians	16,430
Vehicle and Parts Salespersons and Advisers	10,409
Vehicle Valeters and Cleaners	7,453
Sales Accounts and Business Development Managers	6,039
Other Administrative Occupations n.e.c.	6,033

These 5 occupations contribute to 30% (46,363) of the 153,500 new jobs created in the past 10 years.

The ones to watch:

The following have relatively small numbers working in the sector (between 1000 and 3000) but have shown large percentage growth in the past 10 years:

Quality Assurance Technicians

61% increase

Programmers and Software Development

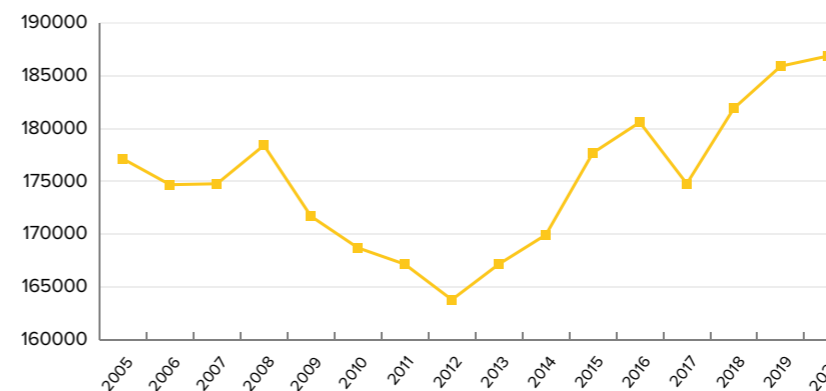
50% increase

Finance and Investment Analysts and Advisers

56% increase

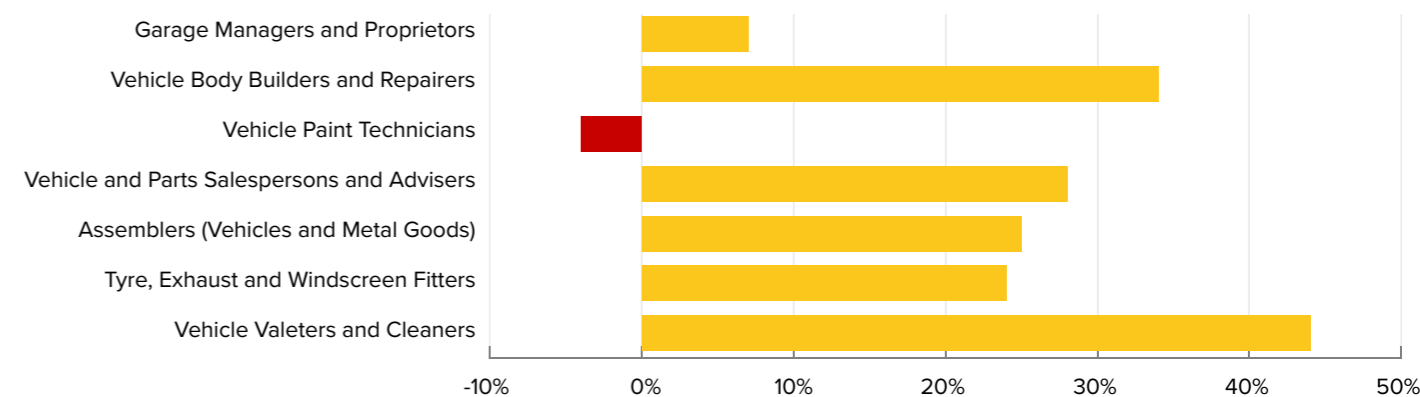
Occupation Trends

Vehicle Technicians, Mechanics and Electricians



18,100
new vehicle technicians in the past 10 years, this is a growth of 11%.

Percentage change in the past 10 years



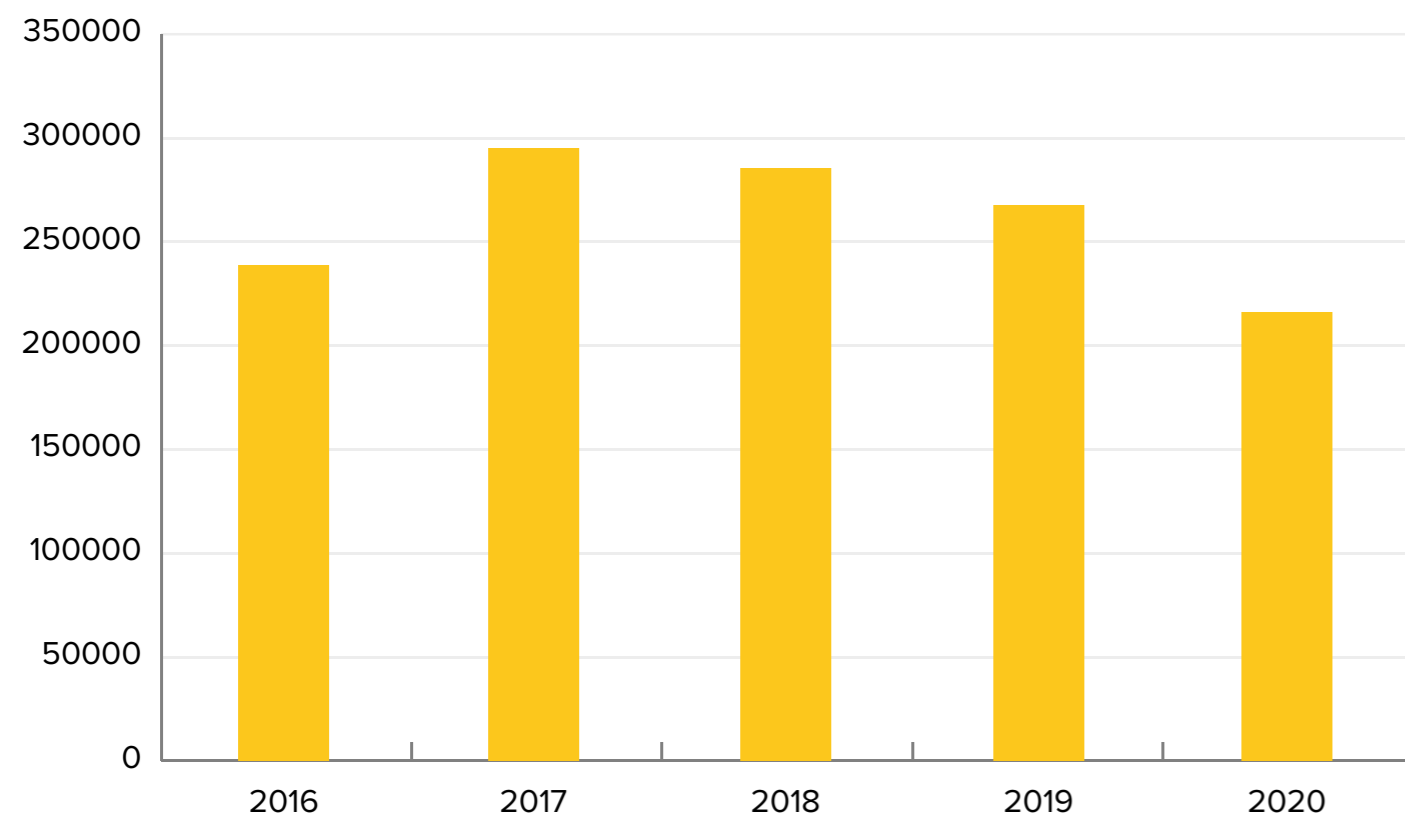
	No. change in past 10 years	% change in past 10 years
Garage Managers and Proprietors	1647	7%
Vehicle Body Builders and Repairers	6261	34%
Vehicle Paint Technicians	-564	-4%
Vehicle and Parts Salespersons and Advisers	12552	28%
Assemblers (Vehicles and Metal Goods)	8859	25%
Tyre, Exhaust and Windscreen Fitters	2622	24%
Vehicle Valeters and Cleaners	10281	44%

Apart from Paint Technicians, all occupations have seen increases in the past 10 years. Valeters has seen the largest growth (44%). Body Builders and Repairers have increased by more than a third (34%) in the past 10 years.



Recruitment Trends

Active online job postings for 8 specific automotive occupations



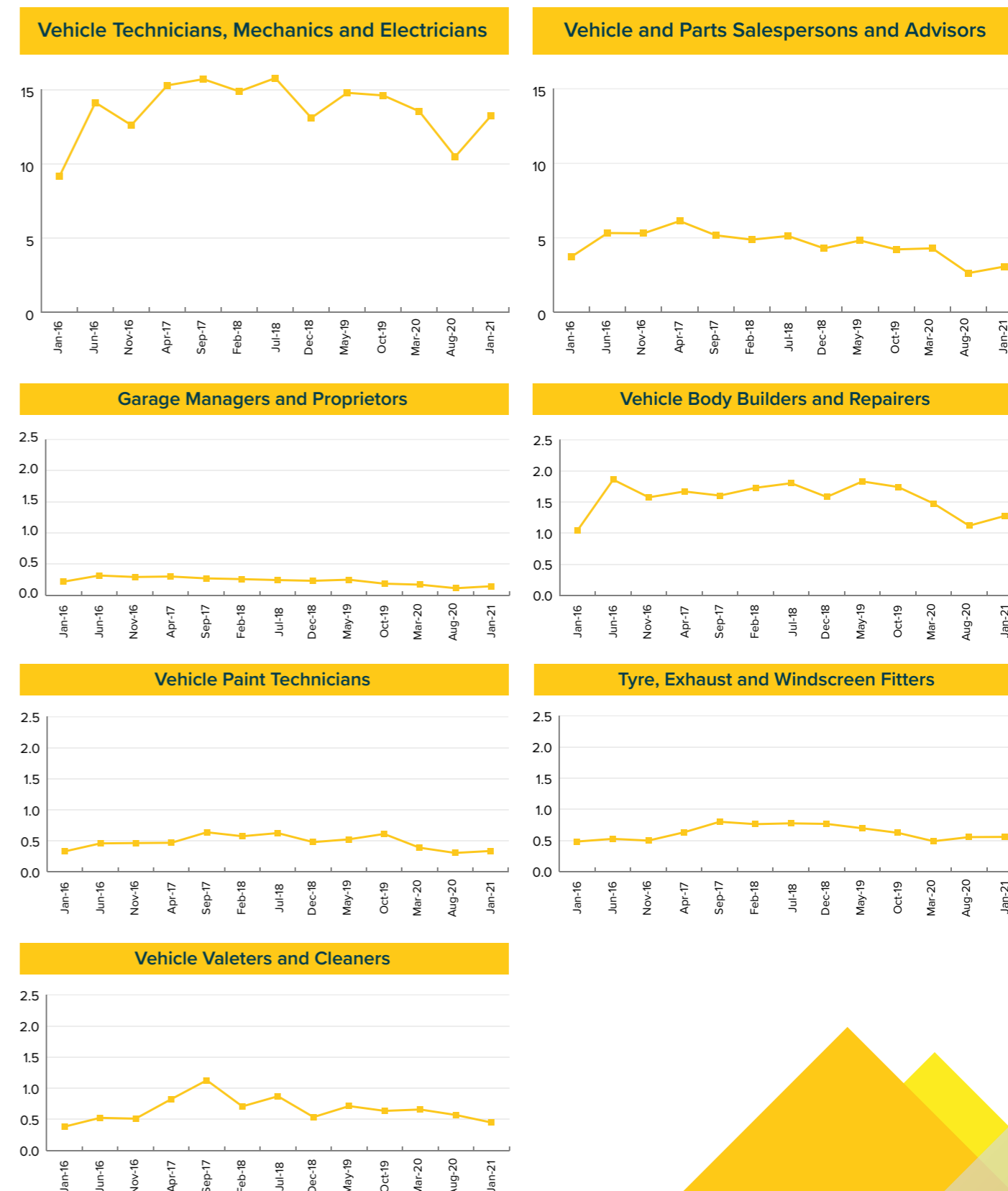
We turn now to what we can learn by tracking the advertisements posted by employers to online job boards.

Overall, the trend suggests a sustained decrease in recruitment demand since 2017. 2020 recruitment posts for the specific automotive occupations are 9% lower than 2016.

All specific automotive occupations follow the same trend although some have been decreasing at a faster rate.

Typically, there are around 17,000 active job posts seeking the 8 specific automotive occupations per month.

Active job postings per 1000



Pay Trends

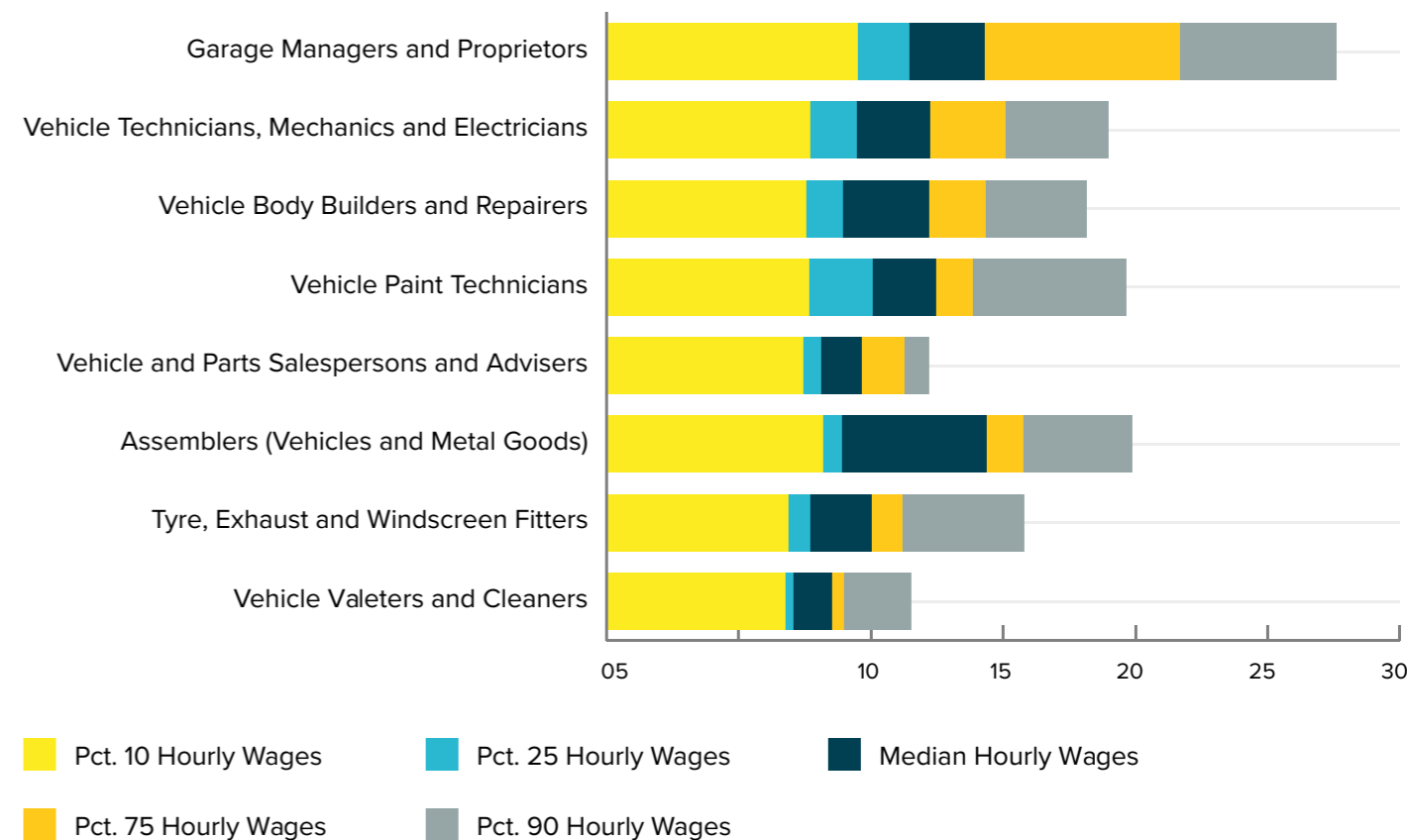
This section examines the pay of those in automotive occupations. The analysis examines Government jobs and wage data via SOC (occupation codes). This data is produced on an annual basis and therefore the most recent data available is 2020. Eight occupations have been selected as it is clear that they operate within the automotive sector.

SOC	Description	2020 Jobs	Median Hourly Wages	Median Wages
9236	Vehicle Valeters and Cleaners	33,705	£8.49	£17,664
7115	Vehicle and Parts Salespersons and Advisers	56,938	£9.64	£20,049
8135	Tyre, Exhaust and Windscreen Fitters	13,512	£10.02	£20,843
5232	Vehicle Body Builders and Repairers	24,786	£12.20	£25,367
5231	Vehicle Technicians, Mechanics and Electricians	186,871	£12.23	£25,431
5234	Vehicle Paint Technicians	12,771	£12.47	£25,940
1252	Garage Managers and Proprietors	25,285	£14.26	£29,666
8132	Assemblers (Vehicles and Metal Goods)	44,897	£14.34	£29,830

- On average, Vehicle Assemblers earn the highest average wage £29,830. However, Garage Managers & Proprietors have the widest distribution of wages indicating that the top 10% earn significantly more, when compared to the other occupations.
- Vehicle Valeters and Cleaners earn the lowest average wage at £17,664 per annum.
- Vehicle and Parts Salespersons have the second lowest hourly wages and one of the narrowest distributions, this is likely because wage data does not incorporate full compensation packages such as bonuses.

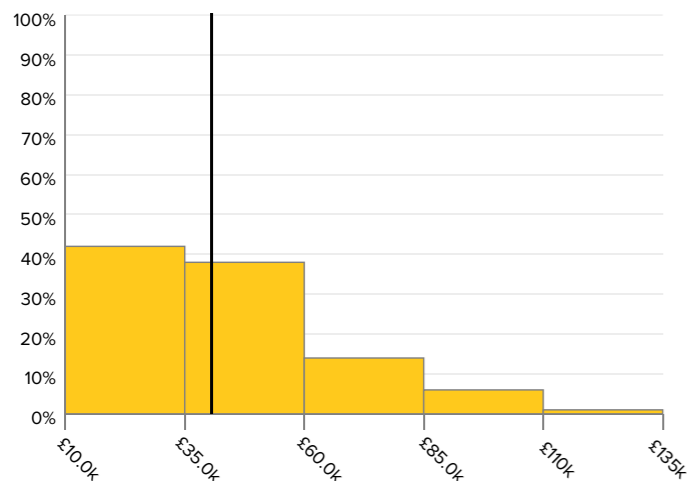
Variation in pay of automotive specific occupations

Comparison of average hourly wages



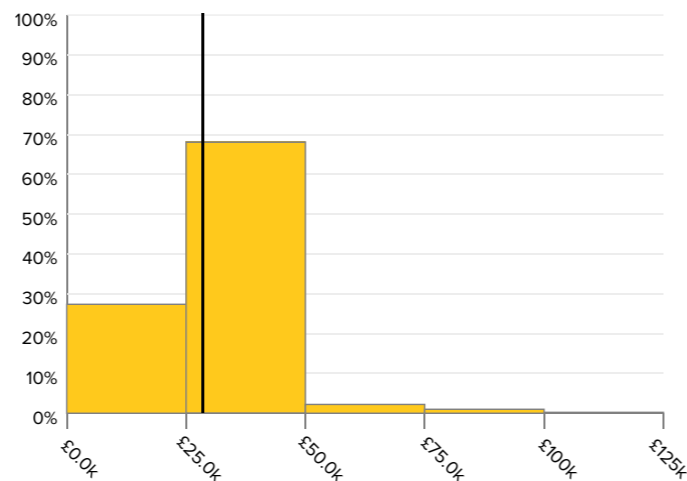
Pay Trends

Garage Managers and Proprietors



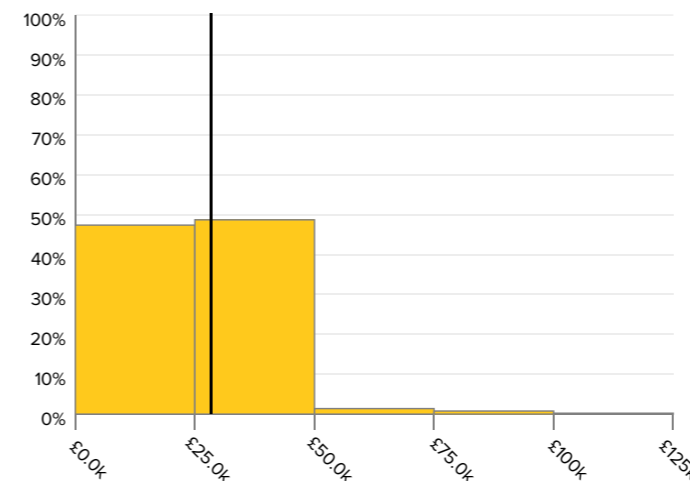
The median advertised salary for Garage Managers and Proprietors is **£37,568**. This is £7,971 above the government recorded median. This occupation has a wide distribution indicating there is an opportunity significantly more than the median advertised salary.

Vehicle Technicians, Mechanics and Electricians



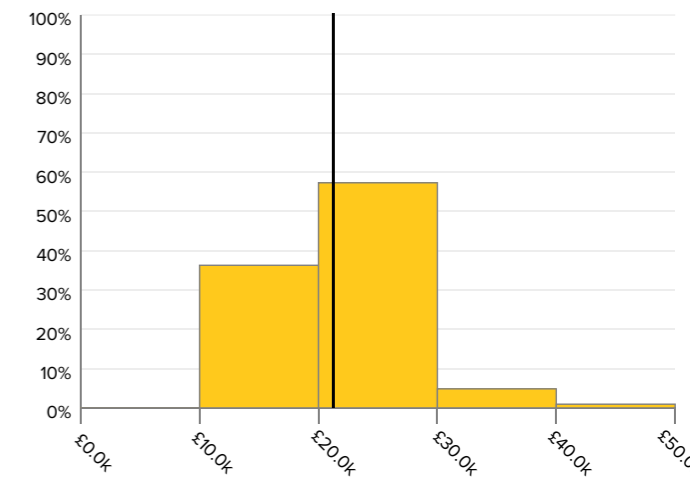
The median advertised salary for Vehicle Technicians, Mechanics and Electricians is **£28,640**. This is £3,191 above the government recorded median. This occupation has a very narrow distribution indicating that the majority of salaries are advertised at near the median.

Vehicle and Parts Salespersons and Advisers



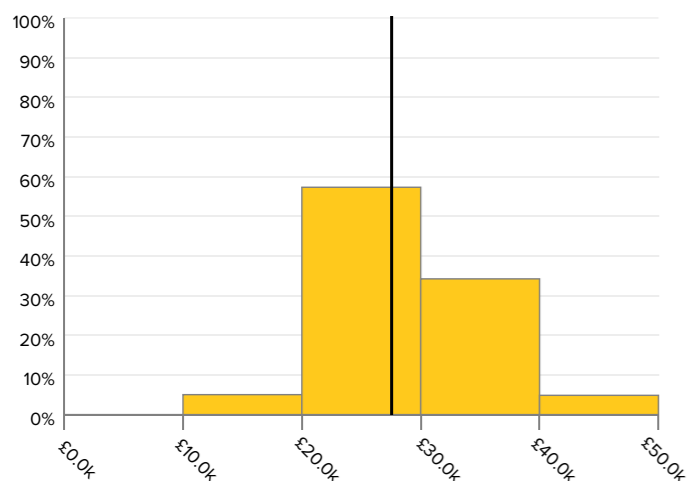
The average advertised salary for Vehicle and Parts Salespersons is **£26,080** which is £6,037 higher than the government recorded salary. There is a large distribution for salaries with a number advertised at £40,000 plus.

Tyre, Exhaust and Windscreen Fitters



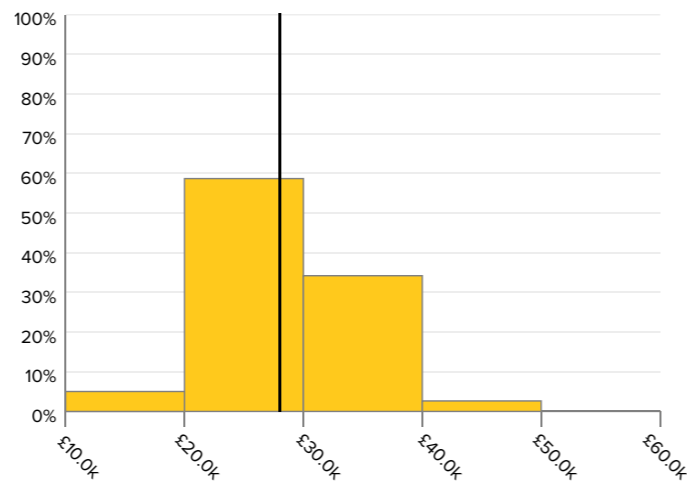
The average advertised salary for Tyre, Exhaust and Windscreen fitters is **£21,568** which is £767 higher than the government recorded salary. The distribution of salaries is very narrow with 58% of advertisements falling within the range of £20,000 - £30,000.

Vehicle Body Builders and Repairers



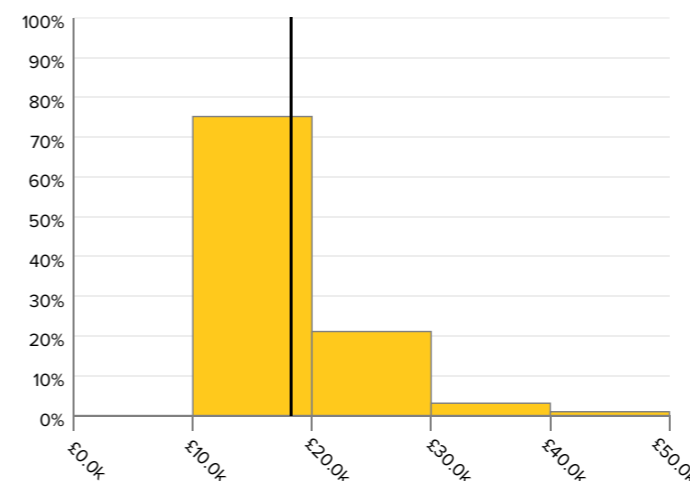
The average advertised salary for Vehicle Body Builders and Repairers is **£28,480** which is £3,022 higher than the government recorded salary. The distribution of salaries is very narrow with 90% of advertisements falling within the range of £20,000 - £40,000.

Vehicle Paint Technicians



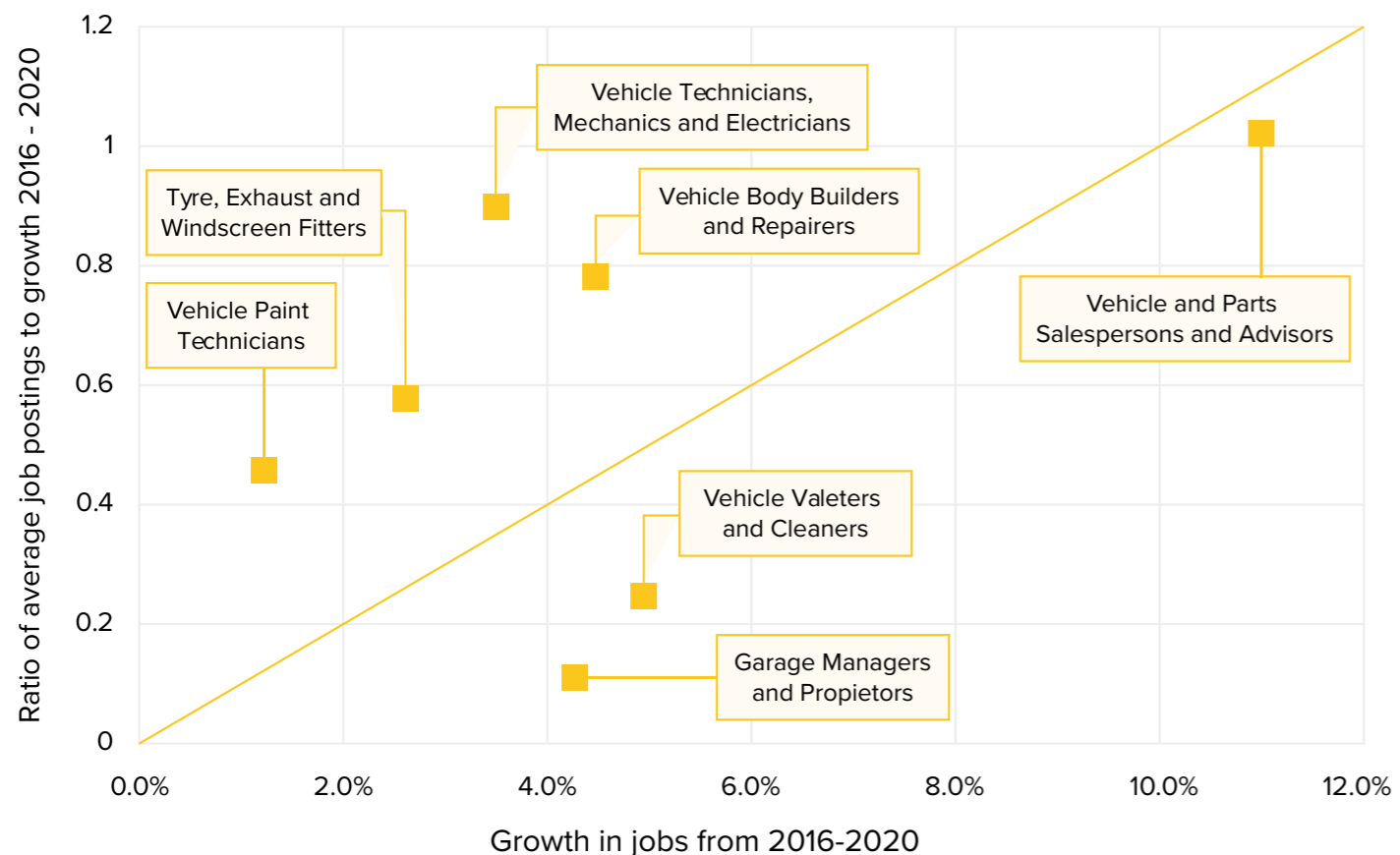
The average advertised salary for Vehicle Paint Technicians is **£27,712** which is £1,748 higher than the government recorded salary. The distribution of salaries is very narrow with 92% of advertisements falling within the range of £20,000 - £40,000.

Vehicle Valeters and Cleaners



The average advertised salary for Vehicle Valeters and Cleaners is **£18,016**. Which is £353 higher than the government recorded salary.

Labour Churn



This graph attempts to evaluate labour market turnover for automotive specific occupations.

It uses an implicit measure; the ratio of online job postings to jobs averaged over the period 2016 to 2020, with each occupation. There are potential biases here, as different groups are more or less likely to advertise online.

The basic interpretation of the graph is that as a growth increases, in theory, job postings could too. To meet this demand is represented by the diagonal line, where occupations above indicate there may be increased turnover.

4 of the 7 occupations analysed are indicating some degree of turnover, Vehicle Technicians has the highest labour churn.

Vehicle Assemblers
earn the highest
average wage
£29,830

13,517
online job
advertisements per
month for Vehicle
Technicians

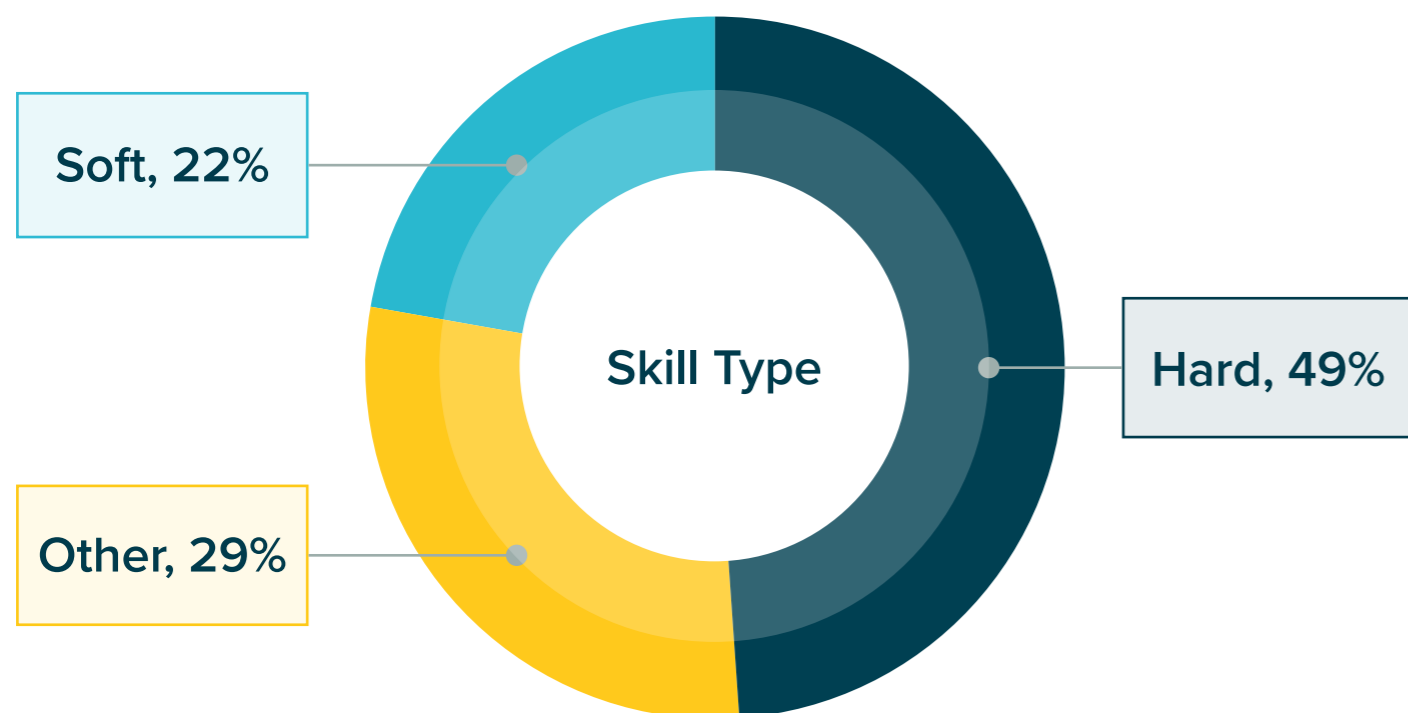
SKILLS

Technical Roles

The following focuses on the following 6 technical roles from the top 20 occupations in the sector, which are:

- Vehicle Technicians, Mechanics and Electricians
- Metal Working Production and Maintenance Fitters
- Assemblers (Vehicles and Metal Goods)
- Vehicle Body Builders and Repairers
- Tyre, Exhaust and Windscreen Fitters
- Vehicle Paint Technicians

Requested skills in technical roles online job advertisements



Just under half of all skills requested in job advertisements for technical roles are for hard skills.

Skill Types

Soft Skills

Are personal habits and traits that shape how an individual works.

Hard Skills

In this analysis, these skills are technical knowledge or training specific to the role.

Other Skills

In this analysis 'other' may include specific qualifications or experience that does not appear to be role specific.

Skill or Qualification	Skill Type	Unique Postings from Jan 2016 - Mar 2021	Rank	% of posts	Change in rank from 2016 to 2020
Mechanics	Hard	157,090	1	19%	→ 0
Communications	Soft	144,271	2	18%	→ 0
Mechanical Engineering	Hard	113,619	3	14%	→ 0
Customer Service	Soft	91,295	4	11%	→ 0
Management	Other	80,412	5	10%	→ 0
Hydraulics	Hard	66,477	6	8%	→ 0
Self-Motivation	Soft	56,473	7	7%	↓ -2
Problem Solving	Soft	53,857	8	7%	→ 0
Detail Oriented	Soft	47,998	9	6%	↓ -1
Operations	Other	47,845	10	6%	↑ 4

The most popular requested skill is for Mechanics, with 19% of job advertisements outlining this skill. Communication is the most popular soft skill.

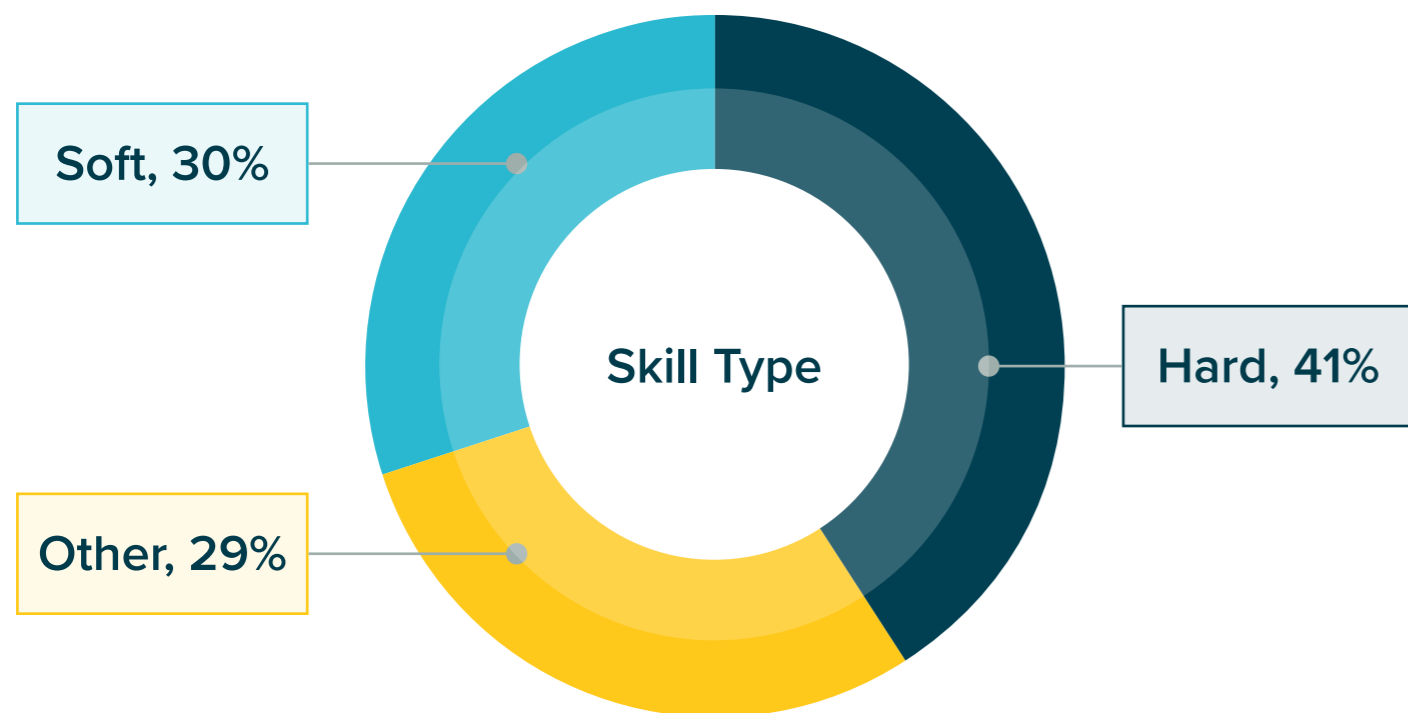
The top ten skills have remained fairly static from 2016 to 2020 with the top 6 skills keeping the same ranking. Self motivation and detail orientated remain in the top 10 but have fallen 2 and 1 position respectively. Operations has moved up 4 positions from 2016 to 2020.

Non Technical Roles

The following focuses on the following 13 non technical roles from the top 20 occupations in the sector, which are:

- Managers and Directors in Retail and Wholesale
- Garage Managers and Proprietors
- Sales Accounts and Business Development Managers
- Book-keepers, Payroll Managers and Wage Clerks
- Sales Administrators
- Other Administrative occupations n.e.c.
- Vehicle and Parts Salespersons and Advisers
- Receptionists
- Sales and Retail Assistants
- Customer Service Occupations n.e.c.
- Van Drivers
- Taxi and Cab Drivers and Chauffeurs
- Vehicle Valeters and Cleaners
- Elementary Storage Occupations

Requested skills in non-technical roles online job advertisements



Just under half of all skills requested in job advertisements for technical roles are for hard skills.

Skill or Qualification	Skill Type	Unique Postings from Jan 2016 - Mar 2021	Rank	% of posts	Change in rank from 2016 to 2020
Communications	Soft	2,412,805	1	31%	↑ 1
Sales	Hard	2,302,404	2	30%	↓ (1)
Customer Service	Soft	2,122,848	3	28%	→ 0
Management	Other	1,556,722	4	20%	→ 0
Detail Oriented	Soft	892,792	5	12%	→ 0
Enthusiasm	Soft	791,658	6	10%	↓ (1)
Accounting	Hard	709,306	7	9%	→ 0
Warehousing	Other	619,837	8	8%	↑ 7
Self-Motivation	Soft	597,242	9	8%	↓ (2)
Microsoft Excel	Other	491,880	10	6%	↓ (1)

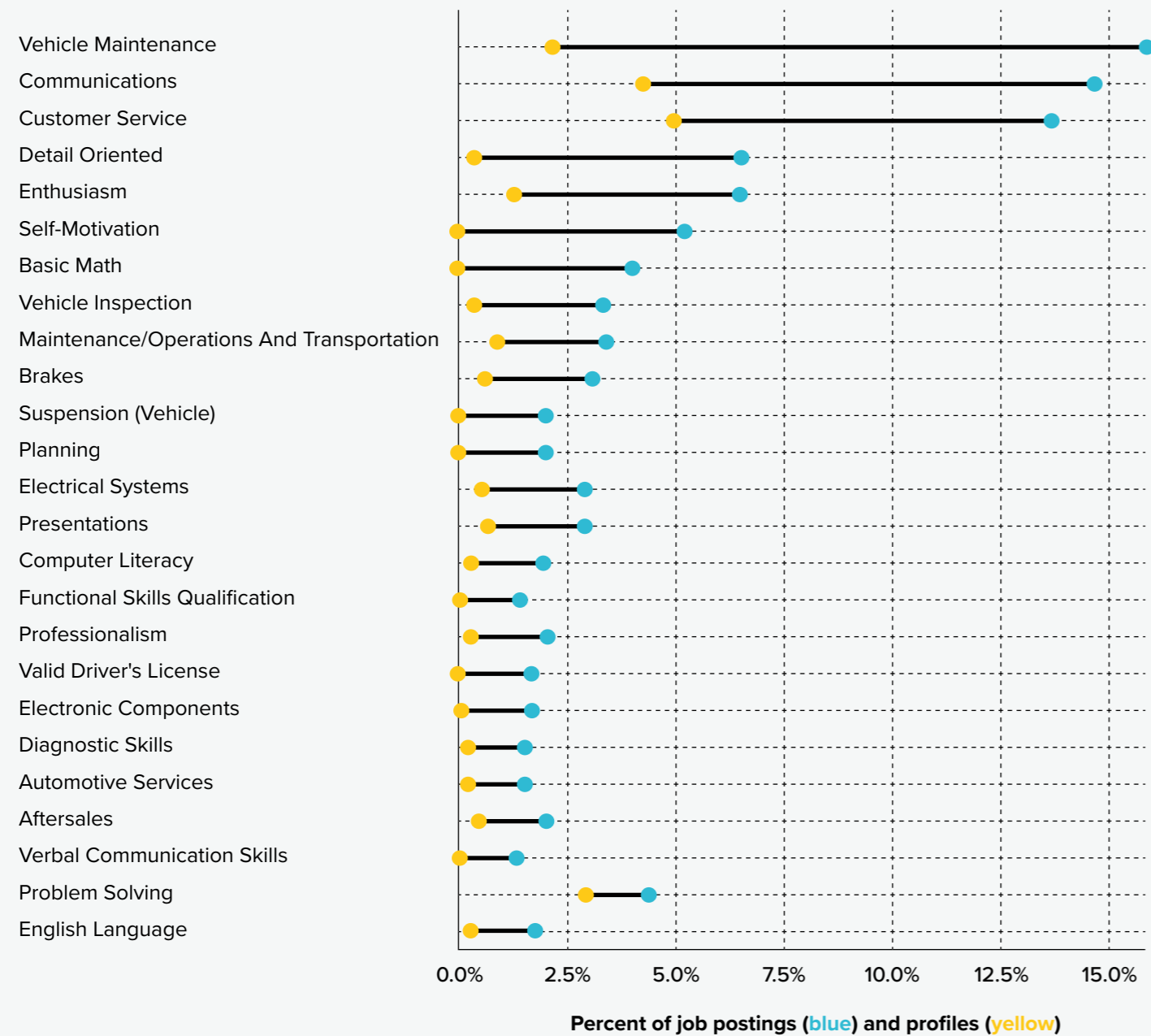
The most popular requested skill is for communications, with 31% of job advertisements outlining this skill; it also moved from second to first from 2016 to 2020.

The top 10 skills have remained fairly static from 2016 to 2020 but have moved positions slightly within this list. However, Warehousing has move up 7 positions from 2016 to 2020, and is now in the top 10.

Supply and Demand - Requested skills versus availability

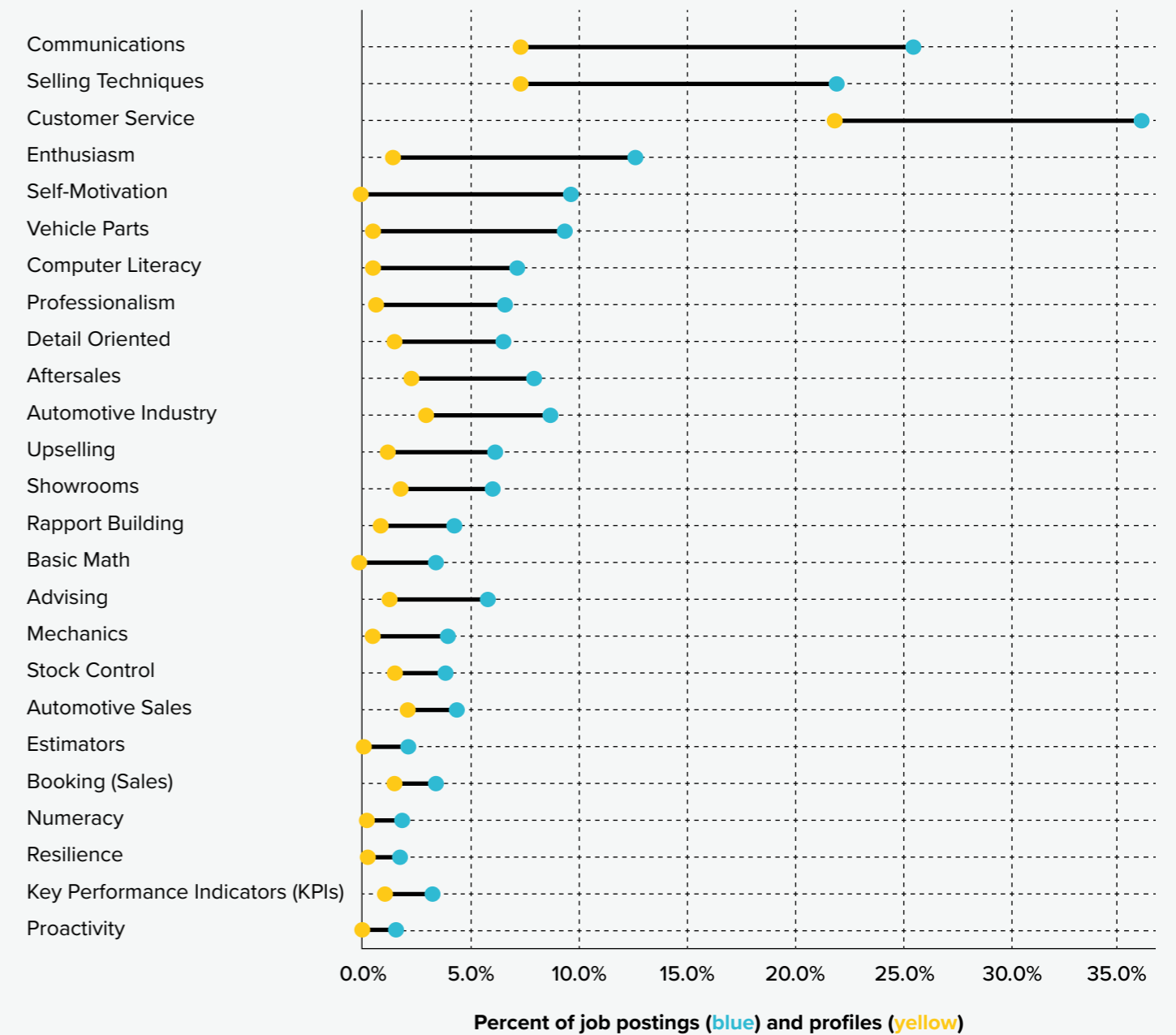
This section examines what skills are being found harder to come by in the recruitment market. We use online job postings but we add in online histories of individual workers. We can compare where the density of skills in postings (representing employer demand) is not matched to or by employer supply.

Vehicle Technicians, Mechanics and Electricians



Of the 25 skills with the largest gap, 15 are soft skills and 10 are hard. The largest gap between supply and demand is vehicle maintenance and second is communications.

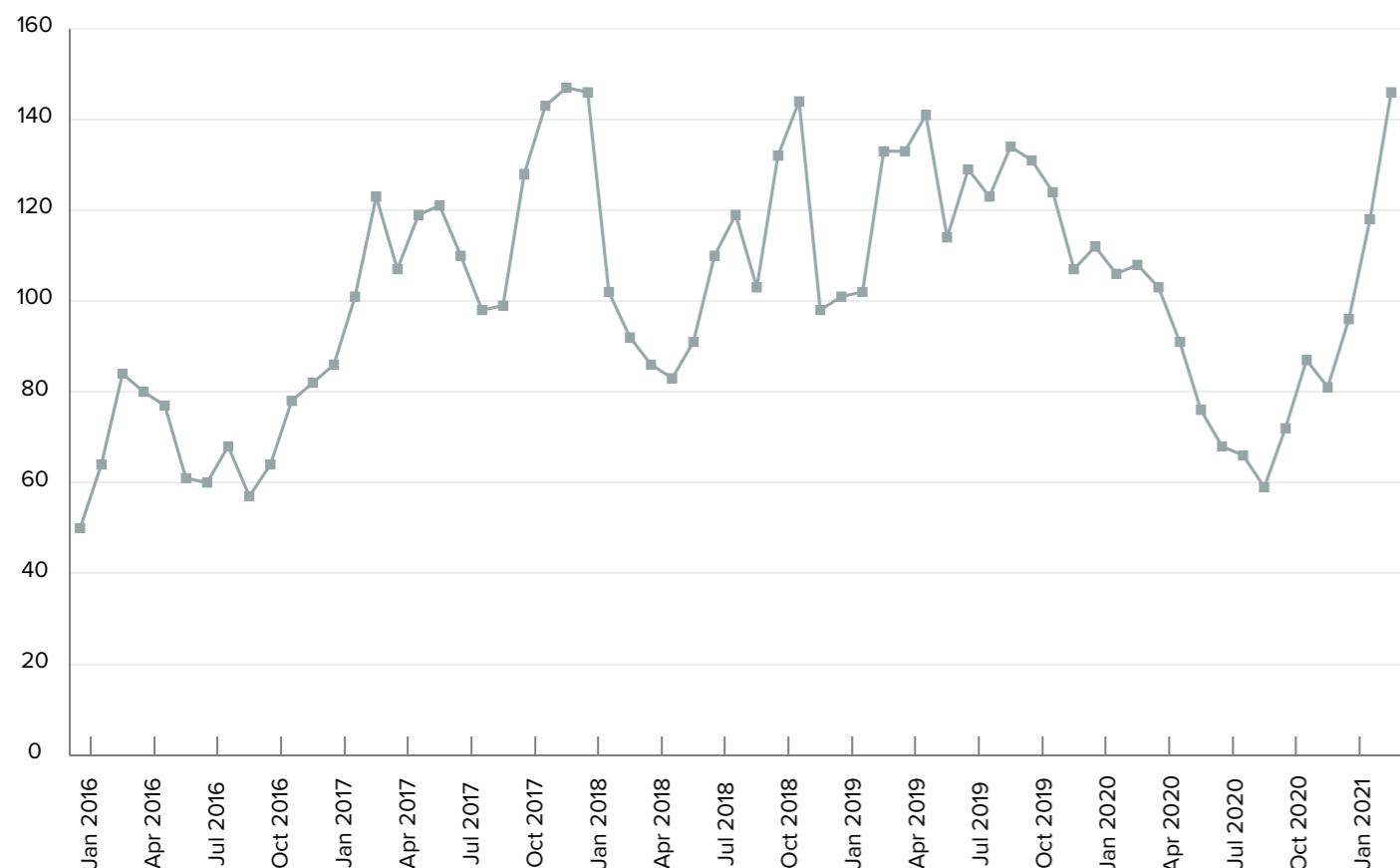
Vehicle and Parts Salespersons and Advisers



Of the 25 skills with the largest gap, 11 are soft skills and 14 are hard. The largest gap between supply and demand is communication and second is selling techniques.

Electric Vehicle

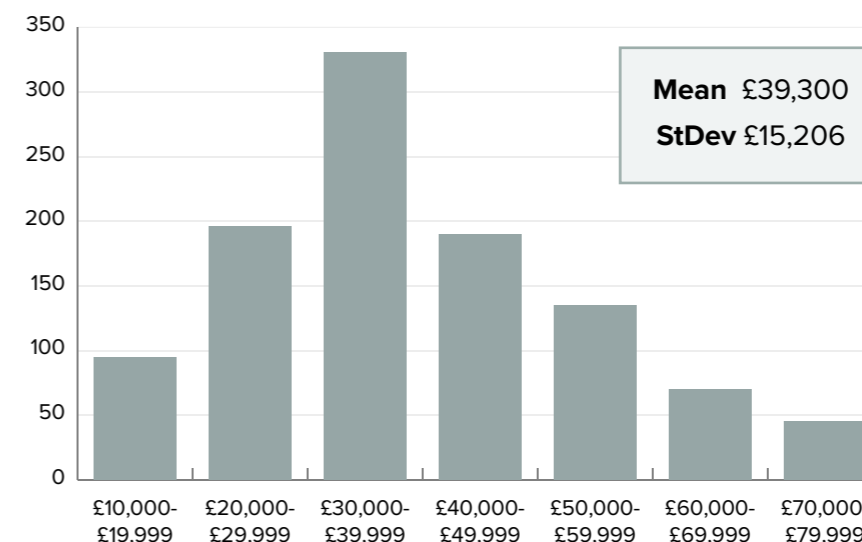
The number of technician job postings requesting electric vehicle skills



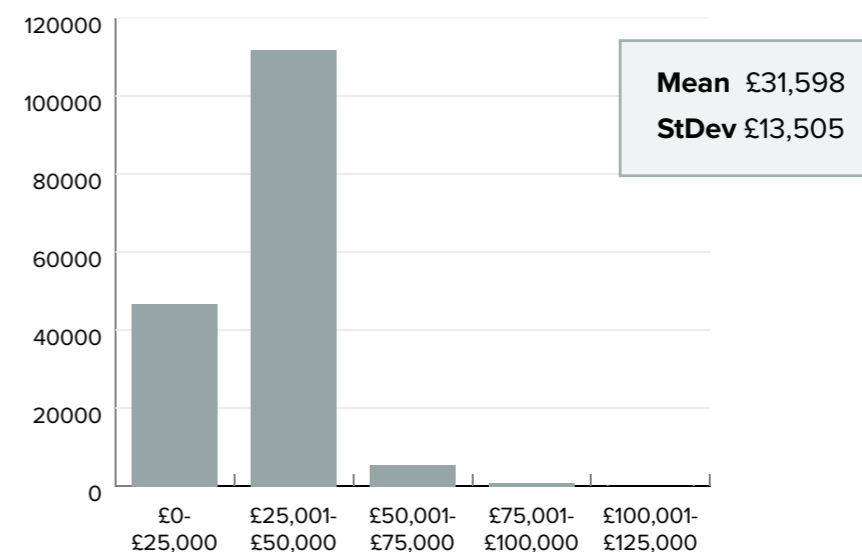
On average **£7,700** is the premium for those with EV skills

Advertised Salaries of Technicians

With Electric Vehicle Skills



Without Electric Vehicle Skills



Job postings advertising for technicians with EV skills and experience was seeing growth up to 2020, when the pandemic effected all recruitment. However, 2021 has seen strong growth as we have resumed with some normality.

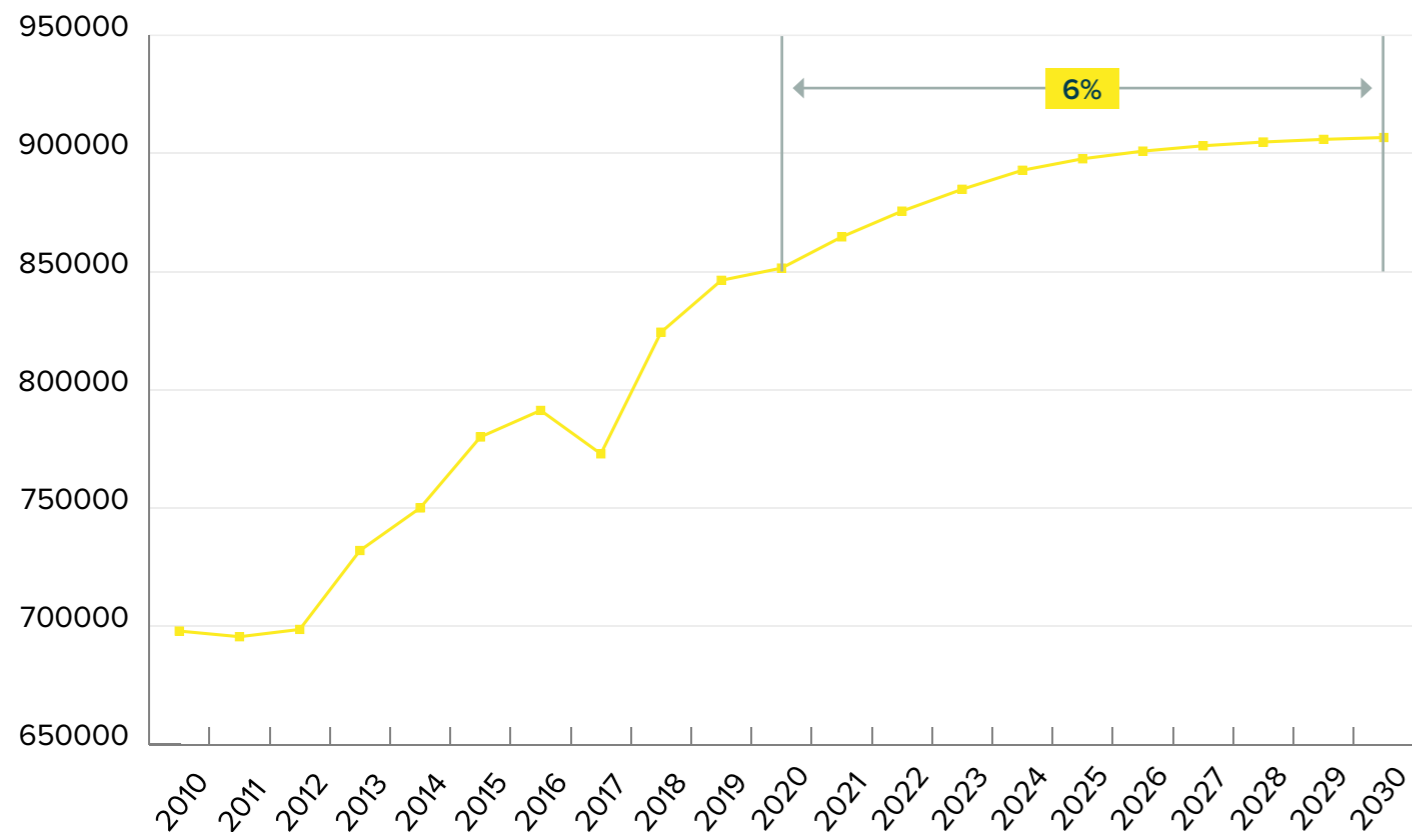
In the past 4 years, the average advertised salary for Vehicle Technicians which requests electric vehicle skills is £39,300.

This is £7,700 more than vehicle technicians' job advertisements that don't request electric vehicle skill. The distribution of salaries is fairly wide and 24% of job advert salaries are higher than £50,000.

THE FUTURE IS BRIGHT

Industry Forecasts

Total Automotive sector jobs over time | 2010 - 2030

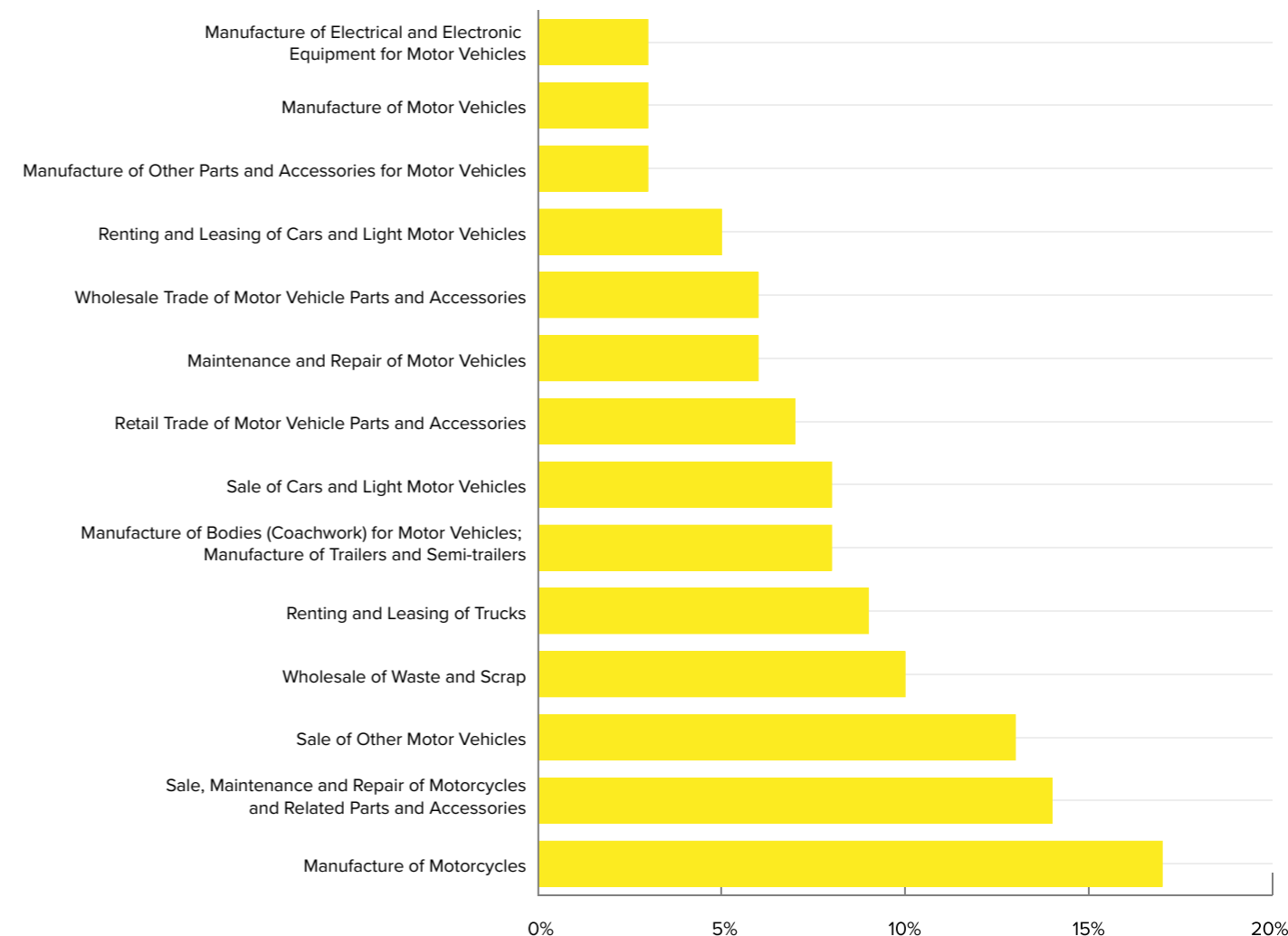


55,255
new jobs by 2030

It is predicted that the sector will grow (in terms of jobs) **6% by 2030**. This would be an additional 55,255 new jobs in the sector.

Growth is expected to be rapid in the first 5 years to 2025, measuring at a 5% increase.

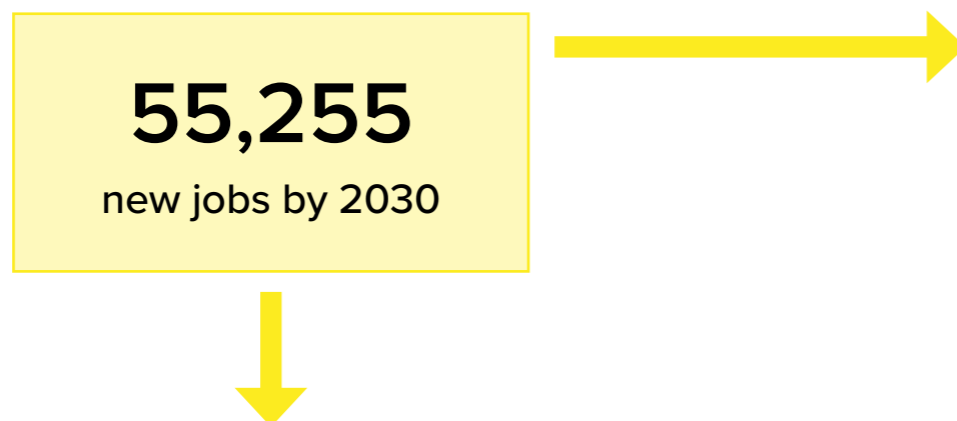
% growth in subsectors between 2020 - 2030



The sub-sector predicting the fastest growth (% terms, not volume) is the manufacture of motorcycles, with a growth forecast at 17% by 2030. All other manufacturing subsectors growth is at a more modest rate of 3%. Other strong growth areas include Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories (14%) and Sale of Other Motor Vehicles (13%).

Occupation Forecasts

What occupations will be needed for the 55,000 new jobs by 2030 ?



Top 5 occupations making up the new jobs

	2020	2030	New Jobs
Vehicle Technicians, Mechanics and Electricians	135,218	142,527	7,309
Vehicle and Parts Salespersons and Advisers	48,716	52,118	3,402
Other Administrative Occupations n.e.c.	26,573	28,689	2,117
Managers and Directors in Retail and Wholesale	18,601	20,544	1,943
Sales and Retail Assistants	19,435	21,316	1,881
Total New Jobs			16,651

In terms of volume, these are the top 5 occupations that will be creating the 55,255 new jobs in the sector. These 5 contribute to 30% of new jobs in 2030.

Some emerging occupations in the sector

The following are some of the occupations predicting significant % increases in the sector by 2030. These may not be the largest in volume terms.



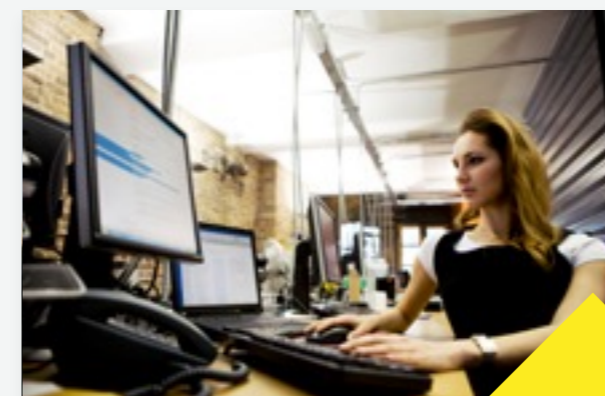
Finance and Investment Analysts and Advisers

16% growth of people in these occupations, sector wide by 2030.



Waste Disposal and Environmental Services

14% growth of people in this occupation, sector wide by 2030.



Information Technology and Telecommunications Professionals

12% growth of people in this occupation, sector wide by 2030

Automation

EMSI's UK Automation Index uses data from different sources to assess the proportion of working time spent in each occupation performing tasks which are at 'high risk' of disruption through automation and, other technological change anticipated over the next 20-30 years.

The index is directly applicable for the amount of working time which could be disrupted by technological change. It ranges between 0% (no working time spent performing tasks at high risk) to 100% (all working time spent performing tasks at high risk).

The index assists in indicating how occupations may change in the future and potentially indicate change in skill requirements.



Top 20 Occupations in the automotive sector – Automation index

SOC	Description	Automation Index	Rank
5234	Vehicle Paint Technicians	81%	17
5232	Vehicle Body Builders and Repairers	80%	22
8132	Assemblers (Vehicles and Metal Goods)	73%	40
8135	Tyre, Exhaust and Windscreen Fitters	72%	45
9236	Vehicle Valeters and Cleaners	68%	59
8212	Van Drivers	62%	72
9260	Elementary Storage Occupations	58%	83
5231	Vehicle Technicians, Mechanics and Electricians	54%	91
4159	Other Administrative Occupations n.e.c.	50%	104
5223	Metal Working Production and Maintenance Fitters	49%	109
4122	Book-keepers, Payroll Managers and Wages Clerks	43%	130
7115	Vehicle and Parts Salespersons and Advisers	34%	164
4151	Sales Administrators	31%	172
8214	Taxi and Cab Drivers and Chauffeurs	30%	175
1190	Managers and Directors in Retail and Wholesale	26%	194
7219	Customer Service Occupations n.e.c.	25%	199
7111	Sales and Retail Assistants	25%	200
4216	Receptionists	21%	218
1252	Garage Managers and Proprietors	13%	247
3545	Sales Accounts and Business Development Managers	4%	287

- Both Vehicle Paint Technicians and Vehicle Body Builders and Repairers ranked in the top 10% of occupations with the highest automation score indicating that there is significant risk of automation in these occupations.
- 81% of Vehicle Paint Technicians, and 80% of Vehicle Body Builders and Repairs working time is spent of performing tasks at high risk of automation.
- 54% of Vehicle Technicians, Mechanics and Electricians working time is spent on performing tasks that are of high risk of automation. It is ranked 91st of all occupations which is in the top 30%.



Data Source: Emsi 2021.1 data [All data sourced from Emsi UK Analyst, Career information taken from Emsi occupation data]



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