

LICHFIELDS



Solent Local Skills Improvement Plan

Health & Social Care Sector | Deep Dive Evidence Report

FINAL REPORT

June 2025

1.0 Introduction

The Solent LSIP brings together employers, colleges, training providers and other stakeholders to set out the key changes needed to make skills training in the region more responsive to employers' needs. This 'deep dive' considers the demand and supply of skills needed to support the health & social care sector in the Solent, now and in the future.

1.1 Introduction

This evidence report has been prepared by Lichfields on behalf of the Hampshire Chamber of Commerce ('CoC') to provide a focused 'deep dive' analysis of the Solent region's health & social care sector, paying particular attention to the current and future skills needed to support the sector's growth.

This deep dive includes a detailed analysis of the demand and supply of skills needed to support the health and social care sector, in addition to a review of existing training provision within the Solent.

Ultimately, this report seeks to identify and highlight the skills gaps within the sector and set out a series of recommendations designed to support the Hampshire CoC (designated as the region's employer representative body, or 'ERB' by the Department for Education, or the 'DfE'), local training providers and other stakeholders across the region shape the local skills agenda through the Solent Local Skills Improvement Plan ('LSIP') process.

1.2 Defining the health and social care sector

The health and social care sector provides a vital service to the UK's population, including society's most vulnerable people. The sector is estimated to support around 3.5 million jobs nationally, and plays a vital role in supporting people's wellbeing and quality of life, in addition to enabling labour market participation and supporting the economy more widely. The sector incorporates a variety of sub-sectors, such as traditional health and social service services, in addition to other related activities as outlined overleaf.

Solent LSIP Overview

The Solent LSIP brings together employers, colleges, training providers, and other stakeholders to set out the key changes needed to make technical skills training in the region more responsive to employers' needs. The LSIP seeks to tackle skills deficits by building on existing and new levels of collaboration, establishing stronger relationships with businesses, and providing practical solutions which aim to transform the Solent's technical skills landscape.

The Solent LSIP identifies 6 key priorities to take forward. Designed to be cross-cutting and applicable to the full range of employment sectors in the Solent (incl. health and social care), these priorities seek to address a number of economy-wide challenges identified via engagement with stakeholders and local employers.

Priority 1:
Awareness and aspiration

Priority 2:
Navigating the skills ecosystem

Priority 3:
Proactive employer engagement

Priority 4:
A more agile ecosystem

Priority 5:
Pathways to skills

Priority 6:
Managing the skills transition

1.0 Introduction

The health & social care sector encompasses a wide range of services beyond traditional medical treatment, and incorporates mental health support, community-based care, preventative services, rehabilitation and long-term care for vulnerable people.

The health and social care sector encompasses a wide range of services beyond traditional medical treatment, and incorporates mental health support, community-based care, preventative services, rehabilitation and long-term care for vulnerable people. The sector has evolved significantly to meet the changing needs of local populations and adaptations to how care is delivered, driven by shifts in demographics, technological advancements and public sector financial constraints.

The definition of health and social care used in this deep dive include both traditional, as well as emerging activities to ensure it considers the full spectrum of skills needs by this sector within the Solent. The list of activities in health and social care considered within this deep dive includes:

- Hospital and related activities;
- Medical practice;
- Residential social work;
- Non-residential social work;
- Dental activities;
- Medical manufacturing; and
- Other health activities.

Activity	Sub-sectors
Hospital and related activities	<ul style="list-style-type: none">• Hospital activities
Medical practice	<ul style="list-style-type: none">• Medical nursing home activities• General medical practice activities• Specialist medical practice activities
Residential social work	<ul style="list-style-type: none">• Residential nursing care facilities• Residential care facilities for learning difficulties, mental health and substance abuse• Residential care activities for the elderly and disabled• Other residential care activities
Non-residential social work	<ul style="list-style-type: none">• Social work activities without accommodation for the elderly and disabled• Other social work activities without accommodation
Dental activities	<ul style="list-style-type: none">• Dental practice activities
Medical manufacturing	<ul style="list-style-type: none">• Manufacture of medical and dental instruments and supplies
Other health activities	<ul style="list-style-type: none">• Other human health activities

Further detail about the sector’s definition is set out in Appendix 1. Wherever possible, the analysis presented in this report seeks to demonstrate evidence at the activity/sub-sector levels identified above. However, due to data limitations, where this is not possible the analysis therefore refers to the health and care sector as a whole.



1.0 Introduction

1.3 Structure of this deep dive

The remainder of this health & social care deep dive is structured as follows:

- **Section 2.0** provides an overview of industry trends within the health & social care sector.
- **Section 3.0** provides an overview of the existing labour market across the Solent.
- **Section 4.0** reviews the skills demand position within Solent for jobs within the health & social care sector.
- **Section 5.0** assesses the skills supply position within the Solent taking account of provision within further education ('FE') and higher education ('HE') providers.
- **Section 6.0** considers the challenges and opportunities associated with skills development in the health & social care sector.

02. Industry Trends

The health and social care sector has faced significant challenges over recent years, including workforce shortages and rising demand due to an ageing population, in addition to the lasting effects of the pandemic on healthcare delivery. The shift to Integrated Care Boards was implemented to enhance collaboration, tackle local inequalities and improving overall outcomes for patients.

2.1 Trends in health and social care

The health and social care sector has experienced a number of challenging years and was particularly impacted by the Covid-19 pandemic, in addition to a number of macro-economic conditions affecting the economy more widely (such as the cost-of-living and energy crises). The sector has experienced other workforce challenges, such as shortages in the supply of labour, which are expected to continue as the demand for health and social care services increases. Over the past decade, workforce growth has struggled to keep pace with the rising demands on the NHS, driven in part by an ageing population, and increasingly complex national healthcare needs.

Nationally, there is a trend of increasing coordination across the healthcare system via NHS Integrated Care Boards ('ICB') introduced through the 2022 Health and Care Act. The shift to ICBs (i.e. from Clinical Commissioning Groups, or 'CCG') sought to deepen collaboration and increase focus on places and local populations, based on the following four aims:

- Improving outcomes in local health and health care;
- Tackling inequalities in outcomes, experience and access;
- Enhancing productivity and value for money; and
- Helping the NHS to support broader social and economic development.

Ultimately, the shift to ICBs emphasises openness and collaboration, knowledge and resource sharing, as well as technological innovation within the wider healthcare system.

Total healthcare expenditure nationally stood at around £257 billion in 2020, which is equivalent to c. £3,800 per capita. This expenditure accounted for c. 12% of total gross domestic product ('GDP') in 2020 (i.e. having increased from 9.9% in 2019) and represents +10% growth over the previous year. While 2020 was an exceptional year due to pandemic-driven demand, the additional pressure of Covid-19 has had a lasting effect on the sector, and highlights the need for a sustained focus on (amongst other things) ensuring a strong pipeline of future talent to satisfy the growing demand for healthcare services now and in the future.

Within the Solent, healthcare provision is primarily delivered by the Hampshire and Isle of Wight ICB, which is responsible for implementing and delivering a healthcare strategy for the sub-region.

3.0 Labour Market Information

In the Solent, the health and care sector supports 85,000 jobs across approximately 1,600 businesses and organisations, with particular concentrations of employment in Southampton and Portsmouth. Together, these support over half of all employment in health and care across the region.

3.1 Local trends in healthcare

As of 2023, the health and social care sector in the Solent was estimated to support around 85,000 jobs (i.e. 15.9% of total employment), across approximately 1,600 businesses and organisations. In general, the sector's make-up (i.e. comprising 66.9% of businesses employing fewer than ten people) is slightly skewed towards larger businesses in comparison with the national average (i.e. comprising 72.1% of businesses employing fewer than ten people). Employment data suggests that the number of jobs in healthcare hit a low of 70,000 in 2016 and has generally trended upwards since then (albeit with a slight decline experienced in 2020).

With a location quotient (or 'LQ') of 1.2, the sector represents an overall higher level of specialisation relative to the national average. This is reflective of the presence of Southampton General which is a leading teaching hospital, able to deliver treatments for every condition where one exists whilst also leading in ground-breaking research.

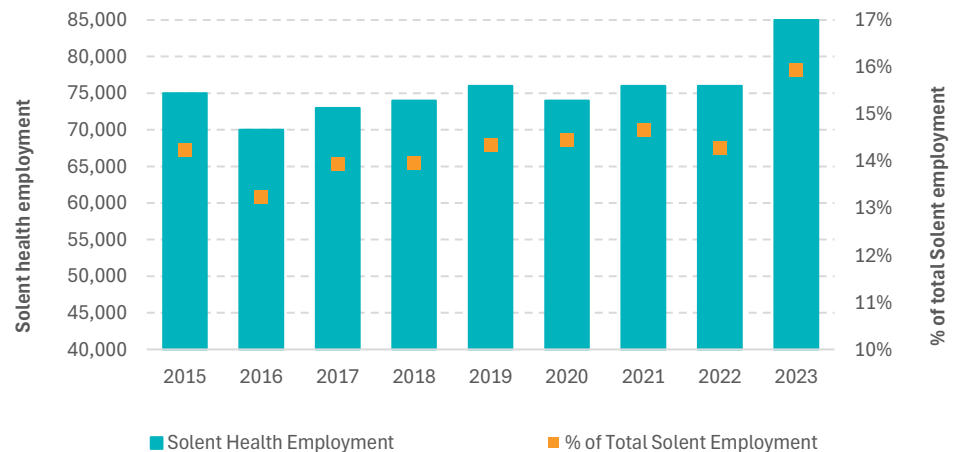
The sector represents a key component of the UK's GDP. Using productivity estimates for jobs in health and social care (from Experian), it is estimated that the sector generates an overall contribution of around £3.2 billion gross value added ('GVA') to the region's economy, which is equivalent to 9.1% of the Solent's economy.

With an estimated 26,000 jobs, Southampton is home to the largest concentration of roles in health and care, supporting around 1-in-3 jobs in the sector across the Solent. This is primarily driven by the presence of Southampton General in addition to other smaller (i.e. feeder) facilities located within the city.

Other key employment areas within the Solent include Portsmouth (with 18,000 jobs), the Isle of Wight (10,000 jobs) and the New Forest (9,000 jobs)

The demography of businesses in healthcare indicates that Southampton accommodates 345 healthcare businesses (equivalent to 21.8% of all businesses in the Solent), followed by the New Forest (260 business) and Portsmouth (235 businesses). This analysis suggests that whilst there are considerable strengths across the sub-region as a whole, the distribution of employment is skewed towards the larger settlements (i.e. Portsmouth and Southampton) which has potential to impact upon delivery, and the ability of employers in other areas to attract and retain specialist labour.

Figure 4.1: Healthcare employment across the Solent (2015-2023)



Source: ONS (2023), Business Register and Employment Survey

4.0 The Demand for Skills (I)

During 2023, the demand for roles in health and social care reached an estimated 27,000 job postings, having increased by around 33% since 2018. However, despite the increase in demand, the sector continues to face long-term challenges attracting and retaining workers in the context of rising employment and evolving market dynamics (i.e. reflecting post-Brexit labour market shifts).

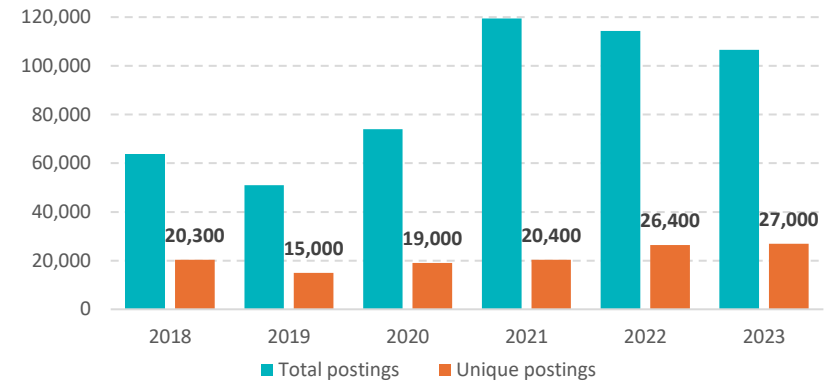
4.1 Changing demand for skills in health and social care

The demand for skills can be measured by considering job postings for roles employers in different sectors are seeking to recruit for. Using a ‘best fit’ approach for occupations in health and social care (as defined in the introduction), it is estimated that throughout 2023 there were around 106,600 total postings for roles in the sector, which is equivalent to around 27,000 unique jobs. For the purposes of this deep dive, only the measure of unique jobs postings is considered, as this excludes any duplication, and reflects more closely the sector’s demand across the Solent.

Analysis of job postings data shows that relative to 2018, the number of unique job postings had increased by around a third (i.e. +33%) by 2023. However, the demand for roles was lowest in 2019, with only an estimated 15,000 job postings. In general, this aligns with the overall trend in general recruitment, where demand fell slightly between 2018 and 2020, and then grew by an estimated +46% by 2023. It should be noted that the demand for roles in health and social care grew during 2020 and 2021, primarily in response to the Covid-19 pandemic, but has stabilised since 2022 as shown in Figure 4.2 to the right.

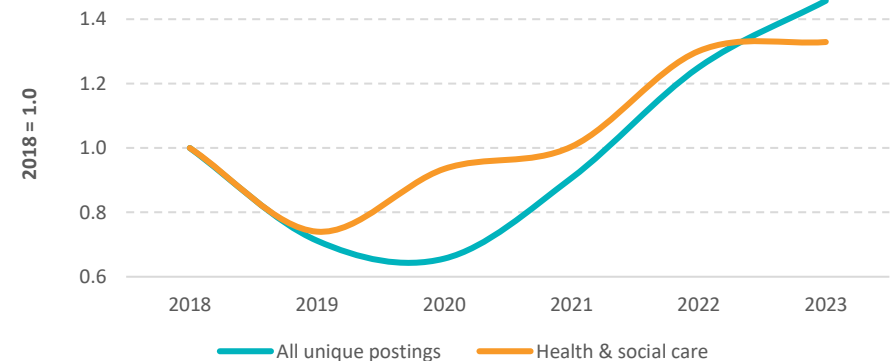
Figure 4.2 suggests that the demand for roles in the sector continued to increase from 2021 onwards. In this instance, the increase in job postings is reflective of changes within the labour market and coincides with the end of the Brexit transition period (which ended on 31 December 2020), an increase in leaving rates for health care staff following the pandemic (i.e. due to increased [workload](#), [poor work-life balance](#), [burnout and stress](#)), in addition to employment growth driven by greater demand. This trend highlights the sector’s ongoing need to attract and retain workers in response to shifting labour market dynamics and long-term challenges intensified by recent events and policy changes.

Figure 4.1: Total and unique health and social care job postings across the Solent (2018-2023)



Source: Lightcast (2023)

Figure 4.2: Total and health and social care job postings across the Solent (base year 2018)



Source: Lightcast (2023)

4.0 The Demand for Skills (II)

Sought-after occupations in health and social care include a wide range of roles such as care worker/home carers, nurse practitioners, social workers, healthcare managers/directors and associate health professionals. Since 2018, the sector has experienced an overall increase in technical roles across the Solent.

4.2 Sought-after roles and occupations

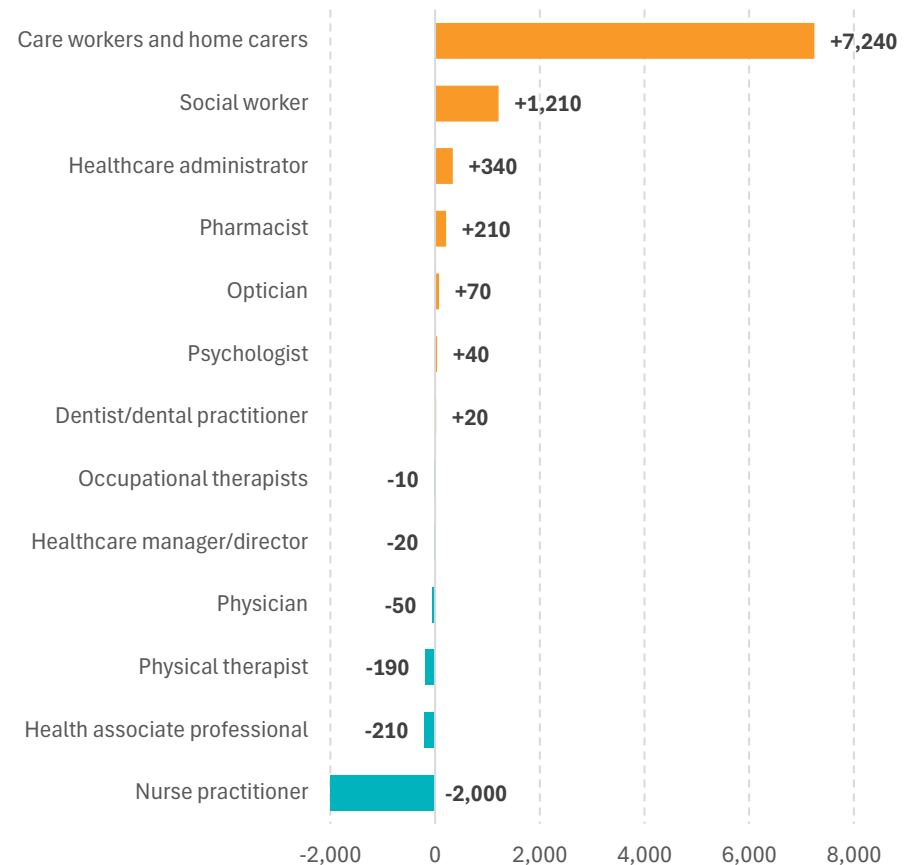
As outlined previously, the health and social care sector incorporates a wide range of activities across different sub-sectors. Drawing on demand data, the top five most sought-after roles in the sector during 2023 composed:

- Care worker/home carer (12,770 job postings);
- Nurse practitioner (5,690 job postings);
- Social workers (3,810 job postings);
- Healthcare manager/director (1,590 job postings); and
- Health associate professional (1,010 job postings).

This analysis suggests that the demand for roles is driven by a range of technical (e.g. care workers) and professional occupations (e.g. nurses and health associate professionals).

A review of the change in demand for roles over the five years to 2023 suggests that this is primarily driven by growth in technical roles (i.e. up to Level 4) such as care workers/homes carers (with an increase of 7,240 roles) and social workers (+1,210 roles). In contrast, the demand for professional roles (i.e. Levels 6 and 7), such as nurses (with 2,000 fewer roles), health associate professionals (-210 roles) and physical therapists (-190 roles) has declined over the same period.

Figure 4.3: Change in health and social care occupation postings across the Solent (2018-2023)



Source: Lightcast (2023)

4.0 The Demand for Skills (III)

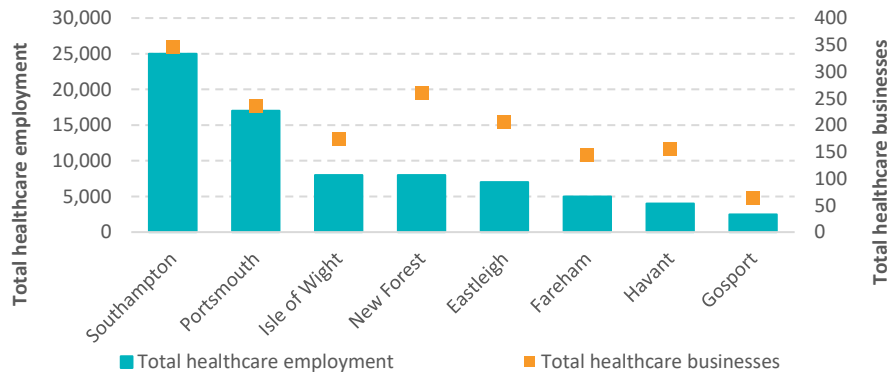
Portsmouth and Southampton account for over half of all jobs in health and social care in the Solent, with Southampton leading demand, and averaging around 10,000 job postings from 2021 onwards. The rising need for roles (i.e. of +33% since 2018) reflects an increase in demand for health and social care services, in addition to a localised focus introduced by the shift to Integrated Care Boards.

4.3 Locational drivers of demand

Analysis of healthcare employment across the Solent (shown in Figure 4.4) indicates that with 25,000 jobs (equivalent to 1-in-3 roles) Southampton has the highest concentration of roles within the sector, followed by Portsmouth (with 17,000 jobs). Together, the two cities represent over half (i.e. 51%) of all employment in health and social care within the Solent. Other areas of relatively higher levels of employment include the New Forest and Isle of Wight (both with 8,000 jobs each).

The analysis presented in Figure 4.5 shows that overall demand has been on the increase from 2020 onwards, with 2023 representing an increase of around +33% over a 2018 starting-point. The evidence shows that across all years, demand was primarily driven by Southampton, hovering around 10,000 unique job postings from 2021 onwards.

Figure 4.4: Total healthcare jobs and businesses across Solent local authorities (2023)

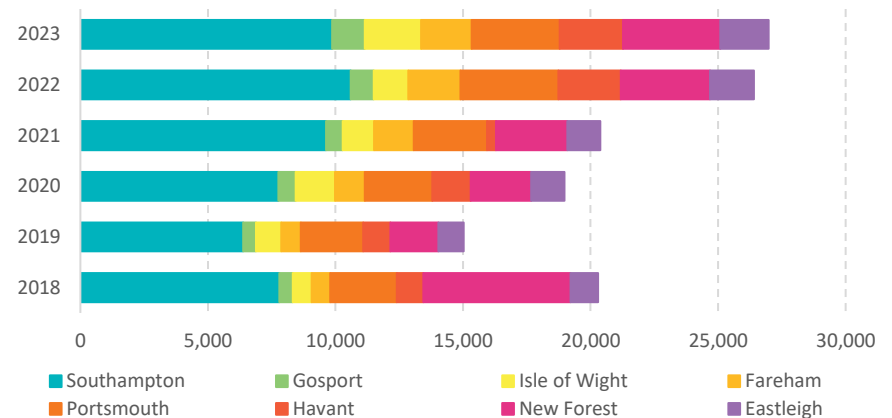


Source: ONS (2023), Business Register and Employment Survey & ONS (2023), UK Business Counts

The data also shows that over the same period the number of unique job postings across the rest of local authorities within the Solent (i.e. both individually and in aggregate) has increased.

It should be noted that this increase ranges across local authorities and varies between years. Ultimately, the growth in demand for roles reflects changes in the demand for services in health and social care, and the increase focus on places and local population brought about by the establishment of ICBs. This shift will be especially important when planning for the future workforce in health and social care within the Solent, and anticipating the roles generated by a growing and ageing local population.

Figure 4.5: Unique healthcare job postings by Solent local authority (2018-2023)



Source: Lightcast (2023)

4.0 The Demand for Skills – Employer perspectives

Stakeholder engagement highlights key recruitment challenges such as low awareness of career opportunities, misperception about “unpleasant tasks”, and low pay relative to the skills required. Future workforce needs will include greater digital literacy, AI knowledge, in addition to strong personal resilience to operate in a high-paced and often pressurised environment.

4.4 Employer Engagement

In addition to reviewing data on job postings, the analysis presented within this deep dive also draws on a review of engagement with employers and other key stakeholders (e.g. training providers, residential care providers, the NHS and local charities) with an interest in health and social care across the Solent. The aim of this engagement was to gather additional insight into some of the challenges employers face when recruiting and building a skilled workforce. It should be noted that the following analysis is based on a round-table discussion towards the end of 2024.

Based on this engagement, employers and stakeholders have identified the following challenges when recruiting for roles in health and social care:

- Challenges attracting individuals in entry-level roles;
- Support workers with a UK driving license;
- People in care worker and registered manager roles;
- Disability nurses and individuals with experience working with adults with learning disabilities;
- IT developers (to support digital shift of the health and care sector); and
- Estate managers.

Charities have also identified challenges recruiting across a multitude of roles, particularly as charity roles are often perceived as having lower job security.

When asked to consider why the sector encounters these challenges, employers and stakeholders identified several possible reasons, including:

- Low levels of awareness of the different roles on offer, and misperceptions about the lack of opportunities leading to “dead end” jobs;
- Misperceptions about having to do “unpleasant” personal care tasks; and
- Generally low levels of remuneration relative to the level of training / skills needed.

4.5 Future Demand

Overall, employers and stakeholder agree that future demand is likely to remain in line with current requirements. In addition to possessing sector-specific skills, future workers in the sector will also require good levels of literacy and communication, soft skills (especially in patient-facing roles), a caring personality, and high levels of personal resilience (especially in the face of pressurised, and often emotionally challenging situations).

However, over recent years (especially following the end of the Covid-19 pandemic) the sector has experienced a greater demand for skills in digital / IT, as several previously in-person services have now migrated online. Furthermore, based on current and anticipated advancements in technology, it is expected that future workers will require a working knowledge of making use of artificial intelligence (‘AI’) applications. These advancements have potential to improve diagnoses, and increase efficiency, in the process reducing overall case load. However, the application of AI will also require a greater understanding of its strengths and weaknesses.

5.0 The Supply of Skills – Skills providers in the Solent

The Solent region hosts a wide range of further education and higher education institutions, alongside independent training providers, and the South Coast Institute of Technology.

5.1 Skills providers within the Solent

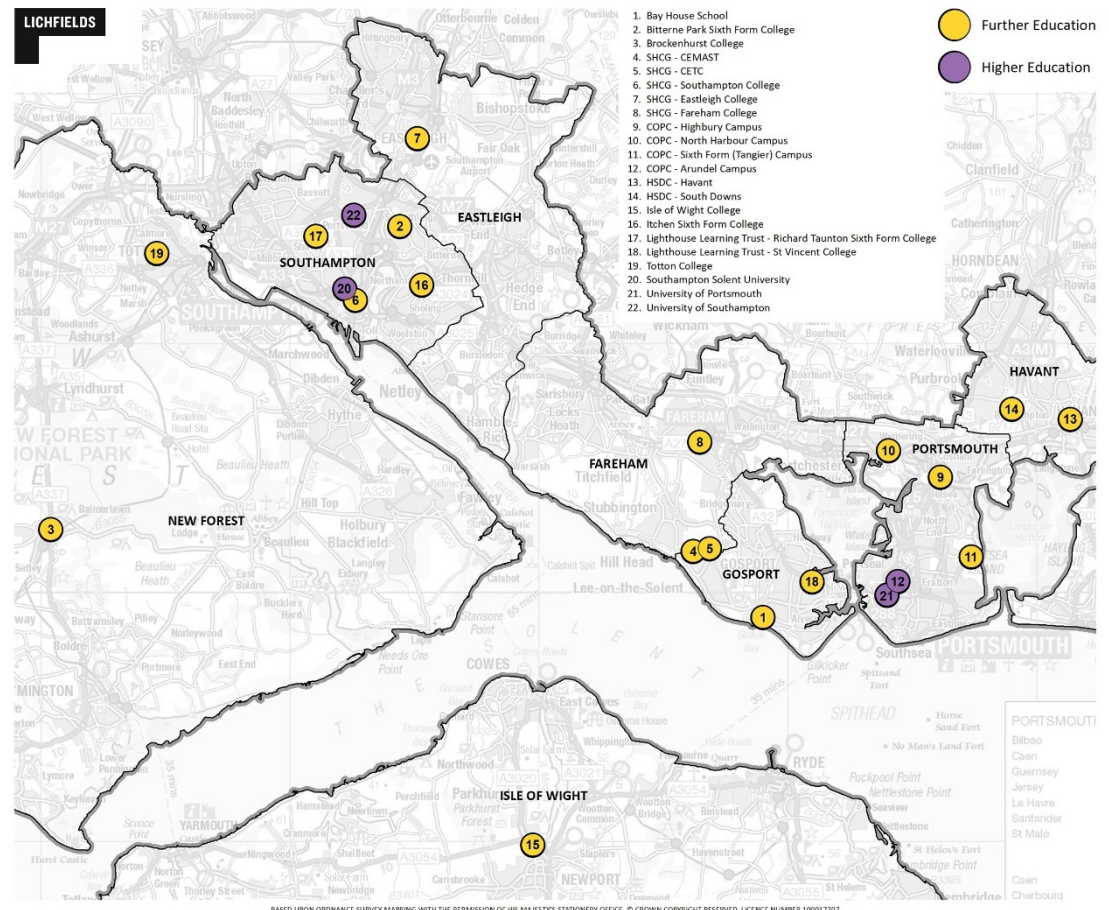
The Solent is home to several higher education (‘HE’) and further education (‘FE’) institutions, in addition to other independent training providers (‘ITP’), offering qualifications, apprenticeships and other vocational training opportunities across a wide range of subject areas related to health and social care.

FE providers offer a wide range of qualifications, including A-Levels, T-Levels, apprenticeships and other vocational/training opportunities aimed at preparing students for careers in health and social care.

The Solent is also home to three HE institutions (i.e. University of Southampton, University of Portsmouth and Southampton Solent University) which together have over 60,000 students registered.

The Solent also benefits from the newly formed South Coast Institute of Technology (‘IoT’). Backed by £13 million of funding from the Department for Education (‘DfE’), the IoT is a collaboration of five FE colleges and two universities, working with well known employers to deliver industry-led courses aiming to meet skills gaps and support regional and national economic growth. The IoT welcomed its first cohort of students in September 2023, and largely focusses on maritime, engineering and digital sectors which are vital to the wider South Coast economy.

Figure 5.1: Higher and further education providers across the eight Solent local authorities



Source: Lichfields analysis

5.0 The Supply of Skills – Mapping provision in Health and Care (I)

Further Education and Higher Education providers in the Solent offer a wide range of courses in health and social care activities, such as health assistant / practitioner / professionals, in addition to children, younger people and adult social care.

5.2 Occupational maps for skills in health and social care

The Institute for Apprenticeships and Technical Education ('IfATE') works with employers to shape, and influence skills training in England. An arm's length body of the DfE, IfATE plays a key role in shaping the skills offer, whilst also ensuring that it reflects employers' needs for current and future skills needs in the sector.

The IfATE mapping identifies two key pathways related to skills in health and social care, which include:

- 1) Health and science; and
- 2) Care services

Additionally, the health and science pathway is sub-divided further, into four additional pathways focusing on:

- 1) Community exercise, physical activity, sports and health;

- 2) Health;
- 3) Healthcare science; and
- 4) Science

Drawing on the [occupational maps](#) for skills in health and care sector Figure 5.2 below identifies over 150 technical, higher-technical and professional-level (i.e. ranging from Level 2 and Level 7) qualifications across 13 providers as outlined in the following pages.

Around half (i.e. 78) of the qualifications identified via our review of FE and HE providers in the Solent focus on health,

and include occupations related to health assistant / practitioner / professional, in addition to midwifery and nursing professionals.

Our review has also identified 26 courses (17% of total) in care services, which include qualifications for adult care workers / managers, care services professionals, and managers focusing on children, young people and families.

However, our review also identified several gaps, including in advice, guidance and advocacy practitioners, in addition to several healthcare science pathways.

A list of courses delivered by the different HE and FE providers in the region is included at Appendix 2. This analysis is not exhaustive and has not included ITPs within the Solent.

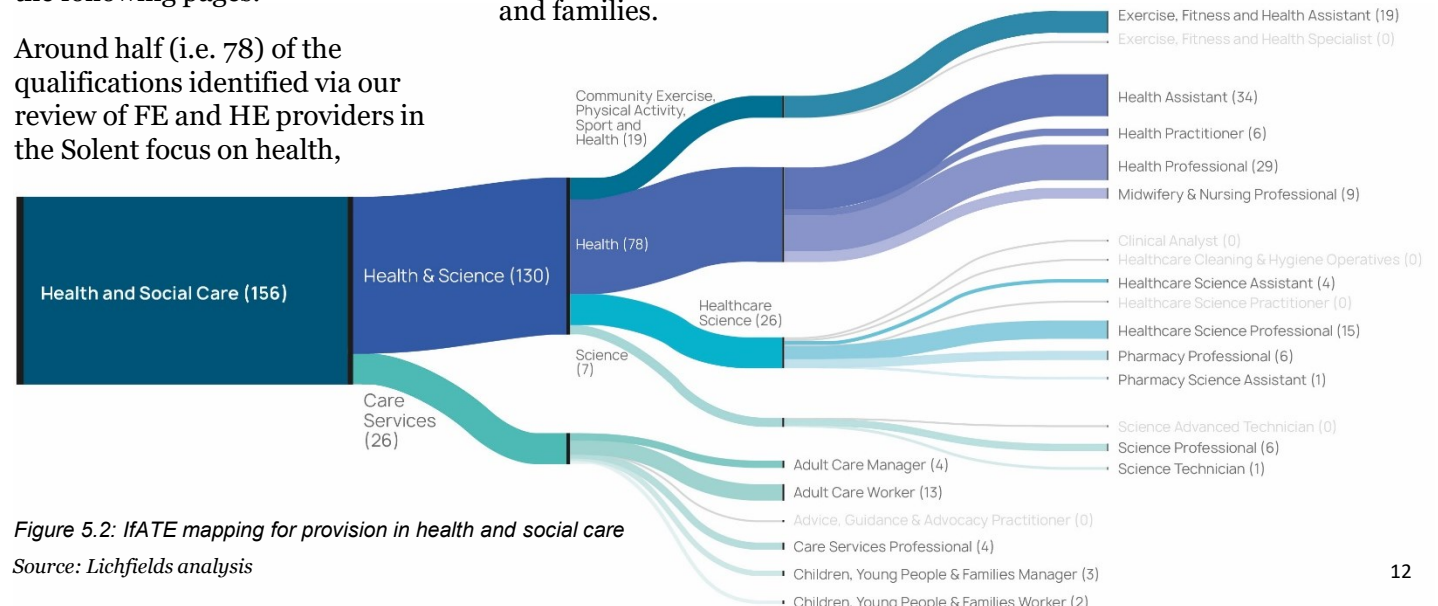


Figure 5.2: IfATE mapping for provision in health and social care

Source: Lichfields analysis

5.0 The Supply of Skills – Mapping provision in Health and Care (II)

A review of the different skills pathways offered by Further Education and Higher Education providers across the Solent has identified a total of 156 courses and/or qualifications across a wide range of subject areas related to health and social care.

5.3 Further Education provision

In total, our research has identified a total of 88 qualifications (i.e. Levels 2 and 3, and in some instances up to Level 6) in health and social care, across ten FE providers in the Solent. These courses cover a wide range of study areas, comprising T-Levels, apprenticeships and degree-level qualifications, such as:

- Health (T-Level);
- Early years care, learning and development (Level 2);
- Diploma in care (Level 2);
- Health and social care (Level 2);
- Health and social care (Level 2 and Level 3);
- Certificate in counselling skills (Level 3);
- Dental nurse apprenticeship (Level 3);
- Laboratory technician apprenticeship (Level 3);
- Gym instructing and personal training (Level 3);
- Leader in adult care apprenticeships (Level 5);
- Person-centred counselling (Level 5 DipHE); and
- Person-centred counselling & psychotherapy (Level 6, BA Hons).

5.4 Higher Education provision

Analysis of HE provision in the Solent shows that there are currently 68 courses in subject areas related to health and social care across the Solent's three HE providers, which comprise a variety of degree-level qualifications (i.e. both at Bachelor's and Master's level, in addition to postgraduate research degrees).

HE provision in the Solent covers the majority of IfATE pathways, with a special focus on qualifications aimed at health professionals, midwifery and nursing professionals, pharmacy, care services, as well as children, young people and families.

A selection of HE qualifications currently on offer across the Solent includes:

- BMBS Medicine;
- BSc Physiotherapy;
- BSc Dental hygiene;
- BSc Biomedical science;
- BEng/MEng Biomedical engineering;
- FdSc Health and social care;
- MSc General practice (nursing and allied health professionals);
- MSc Biomedical engineering;
- Health and social care postgraduate research degree; and
- Health informatics postgraduate research degree.

5.0 The Supply of Skills – Learners in the Solent

In 2023/24, the Solent had around 2,110 learners aged 16-19 in addition to a further 4,190 learners aged 19+ enrolled in courses related to health and social care. Additionally, around 1,700 apprenticeships in health and social care were recorded.

5.5 Further Education learners (16-19 and 19+)

Analysis of Individual Learner Record ('ILR') data shows that in the 2023/24 academic year there were 69,500 learners aged 16-19, in addition to a further 17,200 learners aged 19 and over in the Solent.

Using a best-fit definition for health and social care (which in the case of the ILR identifies health, nursing and social care), it is estimated that there are around 2,110 learners aged 16-19, in addition to a further 4,190 learners aged 19 and over. This means that during the 2023/24 academic year, there were a total of 6,300 learners enrolled in FE courses related to health and social care, equivalent to 7.3% of all learners in the Solent.

Analysis of enrollment data shows that only c. 10% of learners aged 16-19 are pursuing Level 1 courses, with a further 25% pursuing Level 2 courses. In total, it is estimated that around 2-in-3 learners aged 16-19 are pursuing Level 3 courses which highlights a strong progression towards higher-level qualifications within the Solent.

Information on course completions and retention rates outcomes are not available for subject areas, nor are these available for the Solent LSIP geography. However, Hampshire-wide evidence suggests that the area has an overall achievement rate of 84%, with a pass rate of 85.1% pass rate, which is a decline from the previous year (end-of-life of 96.8% in both instances).

When considering adult (i.e. 19+) learners, the ILR data identifies over 450 sector-specific outcomes, ranging from Diplomas in adult care and counselling skills, to certificates in the principles of end-of-life care, and

technical certificates in health and social care.

5.6 Apprenticeships

In total, ILR data shows that during 2023/24, there were over 16,300 people enrolled in apprenticeships across the Solent area. Of these, over 1,700 (i.e. over 10% of all apprenticeships in the Solent) were in health and social care-related subjects. Around 2-in-3 apprenticeship are for higher-level qualification, reflecting the evidence outlined above, whilst only 34% are at advanced and/or intermediate-level.

The areas in which apprentices in health and social care are enrolled in are wide ranging, and include:

- Registered nurse, degree (with 580 apprentices);
- Nursing associated (with 150 apprentices);
- Pharmacy technician (with 120 apprentices);
- Dental nurse (with 100 apprentices);
- Senior healthcare support worker (with 100 apprentices); and
- Advanced clinical practitioner (with 90 apprentices).

5.0 The Supply of Skills – Employer perspectives

Engagement with employers and stakeholders in health and social care has highlighted several challenges to developing a future talent pipeline and have suggested the need for greater engagement between employers and skills providers, in addition to increasing support for employers to access training and providing a wider range of flexible training options.

5.7 Tackling skills gaps and ensuring a talented future pipeline

Our engagement with stakeholders has also identified a series of skills gaps and challenges which could potentially impact upon the supply of skills in health and social care in the Solent over the coming years. When asked to consider ways how the sector could address existing skills gaps, employers and stakeholders have identified a series of possible interventions, including:

- a. Widening opportunities for work experience in the sector, as a way of tackling misperceptions and increasing awareness of the different roles available;
- b. Greater employer engagement and collaboration with FE and HE providers across the Solent (including through course delivery and a targeted public relations campaign);
- c. Increased support for employers to access training (both in terms of funding for training, but also capacity-wise);
- d. Flexible training options (including when delivering continued professional development, or ‘CPD’ initiatives);
- e. Ongoing delivery of skills bootcamps;
- f. Improved pay offer to overcome misperceptions of “dead end” or “last resort” jobs; and
- g. Highlighting the need for employers’ role in proactively planning for the workforce of the future.

6.0 Challenges and priorities for change

The demand for health and social care services in the Solent will increase as the region is anticipated to see 82,000 additional residents by 2038, with population growth driven by the increase in residents aged 65+. These changes will create opportunities for employment growth, and shift the sector's focus towards preventative care and better technological integration. However, critical skills gaps and persistent recruitment challenges will also require attention.

6.1 Scale of opportunity in health and social care

The health and social care sector continues to feel the effects of Brexit and the labour supply challenges this has brought, whilst NHS delivery is still grappling with the after-effects of the Covid-19 pandemic. This challenge is especially when considered within the context of expected population growth in the Solent. Population projections (from the ONS 2018-based Sub-national Population Projections) estimate that the Solent's population will increase by around 82,000 people to 2038.

Population growth will be entirely driven by an increase in residents aged 65 and over, which is projected to increase by around 98,000 people (i.e. +38.7%), while the number of children (i.e. 0-15) and core working age residents (i.e. 16-64) is forecast to decline by c. 16,000 people (or -1.6%). This growth is likely to be an under-estimate, as recent years have seen relatively low levels of housing completions, which is anticipated to be accelerated as a result of the Government's ambition to deliver 1.5 million new homes by 2029. The demographic change is likely to significantly alter the demand for, and put additional pressure on health and social care services.

While the population of over 65-year-olds is forecast to increase, it is likely that future generations will be healthier for longer (due to better lifestyles, and more advanced medicine and medical research). This means that the demand for healthcare services will change, shifting greater emphasis on preventative care. Similarly, the changing demographics (in addition to advances in technology) will influence how healthcare is delivered (i.e. online appointments, greater personalisation and integration of services).

This means that the demand for skills in the sector is also likely to evolve. Employment forecasts (from Experian) suggest that employment in the health sector within the Solent will increase by around 10,300 jobs (i.e. +18.6%) in the 15-years to 2038 (although this figure could be higher). This growth will generate significant opportunities for the sector across the Solent, whilst also responding to the increased demand (i.e. generated by the increased population). Nonetheless, it is likely that existing critical skills gaps will persist, and that skills provision will need to respond to a swiftly changing health and social care sector.

6.2 Skills gaps and challenges

Drawing on the analysis and employer engagement presented in this report, it is anticipated that employers in health and social care (i.e. from the public, private and voluntary sector) across the Solent could face a number of challenges which may impact their ability to balance the demand for skills with local requirements as outlined below.

- **Misperceptions about the sector** – engagement with employers and stakeholders in the sector has highlighted that recruitment is greatly influenced by people's misperceptions about employment in the sector, with many considering entry-level roles as being either “dead end” or “last resort” jobs. This creates challenges attracting new workers to the sector.
- **Remuneration** – linked to the above, employment in the sector is greatly influenced by people's perception about remuneration levels and challenging working conditions.
- **Specialist roles** – stakeholders have also highlighted challenges recruiting for specialist roles (such as disability nurses and experienced individuals working with adults with learning disabilities).

6.0 Challenges and priorities for change - Recommendations

Drawing on the analysis undertaken, and engagement with employers in addition to other relevant stakeholders, this deep dive outlines several priorities for change the Solent LSIP and delivery partners can implement to better balance the demand and supply of skills needed to support a thriving health and social care sector in the Solent, both now and in the future.

- **A growing and ageing population** – whilst not unique to health and social care, the anticipated growth and ageing of the population means that the sector will need to work harder to attract people into roles as a result of a shrinking labour market.
- **Digital transformation** – like most sectors in the economy, health and social care is undergoing a digital transformation, which was accelerated during the recent pandemic as services moved online. These advancements in technology and AI mean that employees will require greater knowledge and understanding of applied technology in the future.
- **Gaps in provision** – whilst our mapping exercise found good coverage across most IfATE skills pathways, it also identified gaps in advice, guidance and advocacy practitioners, in addition to several healthcare science pathways.

6.3 Recommendations for change

A series of actions and recommendations for partners from across the Solent are set out below. These recommendations seek to address the challenges identified, and build a future workforce with the skills needed to support a thriving health and social care sector in the Solent, both now and in the future.

Recommendation	Challenges this addresses
Promote collaboration and engagement between employers, public sector partners (incl. the ICB) and school to help raise awareness of health and social care as a viable career option, highlighting the potential for development and progression.	<ul style="list-style-type: none"> • Help address misperceptions about the sector and drive interest amongst younger learners. • Increase the potential pool of labour for health and social care.
Work to increase training options for existing employees, especially in developing digital skills. This needs to be balanced with ongoing (often required) continuing professional development for medical roles.	<ul style="list-style-type: none"> • Position the existing workforce to easily transition to a greater reliance on digital services (e.g. online consultations).
Encourage employers to proactively plan for the future workforce needs, considering both future constraints related to an ageing population, but also technological advancements (and what this means in terms of entry-level skills into the sector)	<ul style="list-style-type: none"> • Address challenges related to a diminished labour market pool.
Work with partners to continue advocating for improved pay and working conditions to overcome misperceptions of health and social care roles as “dead end” or “last resort” jobs.	<ul style="list-style-type: none"> • Help address misperceptions about the sector and drive recruitment.
Promote greater collaboration between employers and learning providers to address gaps in provision (e.g. in technical occupations, such as clinical analysts, counselling practitioners, as well as exercise and fitness specialists).	<ul style="list-style-type: none"> • Address identified gaps in provision.

Appendix 1 – Detailed SIC code definition of health and social care

Activity	Sub-sector	SIC code
Hospital & related	Hospital activities	86101
Medical practice	Medical nursing home activities	86102
	General medical practice activities	86210
	Specialist medical practice activities	86220
Residential social work	Residential nursing care facilities	87100
	Residential care facilities for learning difficulties, mental health and substance abuse	87200
	Residential care activities for the elderly and disabled	87300
	Other residential care activities	87900
Non-residential social work	Social work activities without accommodation for the elderly and disabled	88100
	Other social work activities without accommodation	88990
Dental activities	Dental practice activities	86230
Manufacturing	Manufacture of medical and dental instruments and supplies	32500
Other health activities	Other human health activities	86900

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (I)

Sector	Sub-sector	Level	Course	Provider	
Care services	Adult care manager	Higher technical occupations	Leader in Adult Care – Level 5 Apprenticeship	SHCG - Eastleigh College	
		Higher technical occupations	Leader in Adult Care Apprenticeship (Level 5)	Havant and South Downs College	
		Higher technical occupations	Lead Practitioner In Adult Care Apprenticeship (Level 4)	Isle of Wight College	
		Higher technical occupations	Leader In Adult Care Apprenticeship (Level 5)	Isle of Wight College	
	Adult care worker	Technical occupations	Lead Adult Care Worker – Level 3 Apprenticeship	SHCG - Eastleigh College	
		Technical occupations	Level 3 Diploma Adult Care (HABC)	SHCG - Eastleigh College	
		Technical occupations	Level 3 Preparing to Work in Adult Social Care	SHCG - Eastleigh College	
		Technical occupations	Adult Care Worker Apprenticeship (Level 2)	Havant and South Downs College	
		Technical occupations	Lead Adult Care Worker Apprenticeship (Level 3)	Havant and South Downs College	
		Technical occupations	Principles of End of Life Care (Level 2)	Havant and South Downs College	
		Technical occupations	Principles of End of Life Care (Level 3)	Havant and South Downs College	
		Technical occupations	Social Care Extended Diploma (Level 3)	Havant and South Downs College	
		Technical occupations	Lead Adult Care Worker Apprenticeship (Level 3)	Isle of Wight College	
		Technical occupations	Adult Nursing Level 3	Lighthouse Learning Trust - Richard Taunton Sixth Form College	
		Technical occupations	Adult Nursing Foundation T-Level Level 3	Lighthouse Learning Trust - Richard Taunton Sixth Form College	
		Technical occupations	Adult Nursing Level 3	Lighthouse Learning Trust - St Vincent Sixth Form College	
		Technical occupations	Adult Nursing Foundation T Level (Level 2)	Lighthouse Learning Trust - St Vincent Sixth Form College	
		Advice, guidance and advocacy practitioner	Higher technical occupations		
		Care services professional	Professional occupations	Childhood and Youth Studies BA	University of Portsmouth
			Professional occupations	Early Childhood Studies BA	University of Portsmouth
	Professional occupations		Social Work BSc/MSc	University of Portsmouth	
	Professional occupations		BSc/MA Social Work	Southampton Solent University	
	Children, young people and families manager	Higher technical occupations	Health Care Play Specialism FdSc	Southampton Solent University	
		Higher technical occupations	Early Years Care and Education FdA	University of Portsmouth	
		Higher technical occupations	Early Years Lead Practitioner Apprenticeship Level 5	Totton College	
		Technical occupations	Care: Child, Health and Social Futures Level 2	Totton College	
		Technical occupations	Early Years Educator Apprenticeship Level 3	Totton College	

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (II)

Sector	Sub-sector	Level	Course	Provider
Community exercise, physical activity, sport and health	Exercise, fitness and health assistant	Technical occupations	Level 2 NCFE Certificate in Gym Instructing	SHCG - Fareham College
		Technical occupations	Level 2 Sport	SHCG - Fareham College
		Technical occupations	Level 2 YMCA Certificate in Gym Instructing	SHCG - Eastleigh College
		Technical occupations	Level 3 Gym Instructing & Personal Training	SHCG - Fareham College
		Technical occupations	Level 3 Sport & Physical Activity (Sport & Exercise Science)	SHCG - Fareham College
		Technical occupations	Level 3 YMCA Diploma in Personal Training	SHCG - Eastleigh College
		Technical occupations	Sport (Level 2)	City of Portsmouth College
		Technical occupations	Personal Training (Level 2)	City of Portsmouth College
		Technical occupations	Planning & Delivering Gym Based Exercise (Level 2)	City of Portsmouth College
		Technical occupations	Personal Training (Level 3)	City of Portsmouth College
		Technical occupations	Sports Coaching & Development (Level 3)	City of Portsmouth College
		Technical occupations	Extended Diploma in Sport and Physical Activity (Level 3)	Bay House School
		Technical occupations	Sport And Physical Activity - Science And Coaching Level 3	Isle of Wight College
		Technical occupations	Sport And Fitness Diploma Level 2	Isle of Wight College
		Technical occupations	Sport And Fitness - Gym Instructing Level 2	Isle of Wight College
		Technical occupations	Sports Coaching (Level 3)	Lighthouse Learning Trust - Richard Taunton Sixth Form College
		Technical occupations	Sports Coaching (Level 3)	Lighthouse Learning Trust - St Vincent Sixth Form College
		Technical occupations	Sport Level 3	Totton College
		Technical occupations	Health, Fitness & Exercise Instruction Level 2 Diploma	Brockenhurst College
		Higher technical occupations	n/a	n/a
Health	Health assistant	Technical occupations	Dental Nurse – Level 3 Apprenticeship	SHCG - Eastleigh College
		Technical occupations	Level 2 Health & Social Care	SHCG - Eastleigh College
		Technical occupations	Level 2 Health & Social Care	SHCG - Fareham College
		Technical occupations	Level 3 Access to HE Diploma – Nursing	SHCG - Fareham College
		Technical occupations	Level 3 Access to HE Diploma – Health Professionals	SHCG - Fareham College
		Technical occupations	Level 3 Access to HE Diploma – Midwifery	SHCG - Fareham College
		Technical occupations	Level 3 Access to University and HE – Medicine	SHCG - Eastleigh College
		Technical occupations	Level 3 Access to University and HE – Nursing and Healthcare Professions	SHCG - Eastleigh College

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (III)

Sector	Sub-sector	Level	Course	Provider
Health	Health assistant	Technical occupations	Level 3 Certificate in Counselling Skills	SHCG - Southampton College
		Technical occupations	Level 3 Diploma in Dental Nursing	SHCG - Eastleigh College
		Technical occupations	Level 3 T Level Health	SHCG - Eastleigh College
		Technical occupations	Level 3 T Level Supporting Healthcare	SHCG - Fareham College
		Technical occupations	Health & Social Care Extended Diploma (Level 2)	City of Portsmouth College
		Technical occupations	Health/Early Years Foundation Year T Level (Level 2)	City of Portsmouth College
		Technical occupations	Health & Social Care Certificate (Level 3)	City of Portsmouth College
		Technical occupations	Health & Nursing T Level (Level 3)	City of Portsmouth College
		Technical occupations	Health & Social Care (Level 3)	Bay House School
		Technical occupations	Counselling Skills (Level 2)	Havant and South Downs College
		Technical occupations	Counselling Skills (Level 3)	Havant and South Downs College
		Technical occupations	Health & Nursing (Level 3)	Havant and South Downs College
		Technical occupations	Health & Science (Level 2)	Havant and South Downs College
		Technical occupations	Health & Social Care (Level 3)	Havant and South Downs College
		Technical occupations	Health & Social Care Extended Certificate (Level 3)	Havant and South Downs College
		Technical occupations	Health & Social Care Extended Diploma (Level 2)	Havant and South Downs College
		Technical occupations	Mental Health Awareness (Level 2)	Havant and South Downs College
		Technical occupations	Health And Social Care (Level 3)	Isle of Wight College
		Technical occupations	Health & Social Care (Level 2)	Isle of Wight College
		Technical occupations	Health & Social Care Level 2	Itchen Sixth Form College
	Technical occupations	Health & Social Care Level 3	Itchen Sixth Form College	
	Technical occupations	Health & Social Care Level 3	Lighthouse Learning Trust - Richard Taunton Sixth Form College	
	Technical occupations	Health & Social Care Level 3	Lighthouse Learning Trust - St Vincent Sixth Form College	
	Technical occupations	Health & Social Care Extended Certificate (Level 3)	Bitterne Park Sixth Form College	
	Technical occupations	Health & Social Care Level 3 Extended Diploma	Brockenhurst College	
	Technical occupations	Health and Social Care Level 2	Brockenhurst College	
	Health practitioner	Higher technical occupations	Level 4/5 DipHE Cognitive Behavioural Therapy (CBT) Counselling	SHCG - Eastleigh College
		Higher technical occupations	Level 4/5 DipHE Gestalt Counselling	SHCG - Eastleigh College
Higher technical occupations		Level 4/5 DipHE Humanistic Counselling	SHCG - Eastleigh College	
Higher technical occupations		Level 4/5 Healthcare Professions Support (MAP): Module 1	SHCG - Eastleigh College	
Higher technical occupations		Level 5 DipHE in Person-Centred Counselling	SHCG - Southampton College	
Higher technical occupations		Health and Social Care FdSc	Southampton Solent University	

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (IV)

Sector	Sub-sector	Level	Course	Provider
Health	Health professional	Professional occupations	Level 6 BA (Hons) in Person Centred Counselling & Psychotherapy – top-up	SHCG - Southampton College
		Professional occupations	Level 6 BSc (Hons) Cognitive Behavioural Therapy (CBT) Counselling – top-up	SHCG - Eastleigh College
		Professional occupations	Level 6 BSc (Hons) Gestalt Counselling – top-up	SHCG - Eastleigh College
		Professional occupations	Level 6 BSc (Hons) Humanistic Counselling – top-up	SHCG - Eastleigh College
		Professional occupations	BSc/MSc Audiology	University of Southampton
		Professional occupations	BMBS Medicine	University of Southampton
		Professional occupations	BSc Occupational Therapy	University of Southampton
		Professional occupations	BSc Physiotherapy	University of Southampton
		Professional occupations	MSc Advanced Aesthetic and Restorative Dentistry	University of Portsmouth
		Professional occupations	Advanced Clinical Practice MSc	University of Portsmouth
		Professional occupations	BSc Advanced Dental Nursing Professional Practice	University of Portsmouth
		Professional occupations	Advanced Digital Dentistry (Top Up) MSc	University of Portsmouth
		Professional occupations	Cognitive Behavioural Therapy DipHE	University of Portsmouth
		Professional occupations	Conscious Sedation for Dentistry PgCert	University of Portsmouth
		Professional occupations	BSc Psychology	University of Southampton
		Professional occupations	Dental Hygiene BSc	University of Portsmouth
		Professional occupations	Dental Nursing CertHE	University of Portsmouth
		Professional occupations	Diagnostic Radiography and Medical Imaging BSc	University of Portsmouth
		Professional occupations	Gestalt Counselling DipHE	University of Portsmouth
		Professional occupations	Health and social care postgraduate research degree	University of Portsmouth
		Professional occupations	MSc Health Psychology	University of Portsmouth
		Professional occupations	BSc Humanistic Counselling	University of Portsmouth
		Professional occupations	BSc Paramedic Science	University of Portsmouth
		Professional occupations	Physiotherapy MSc	University of Portsmouth
		Professional occupations	Professional Doctorate in Health and Social Care	University of Portsmouth
		Professional occupations	Psychological Sciences BSc/MSc	University of Portsmouth
	Professional occupations	Assistant Practitioner (Health) Apprenticeship	Southampton Solent University	
	Professional occupations	BSc Psychology	Southampton Solent University	
	Professional occupations	BSc Psychology with Counselling and Mental Health	Southampton Solent University	
	Midwifery and nursing professional	Professional occupations	BSc Midwifery	University of Southampton
Professional occupations		BSc/MNurs Nursing	University of Southampton	
Professional occupations		MN Adult Nursing	University of Portsmouth	

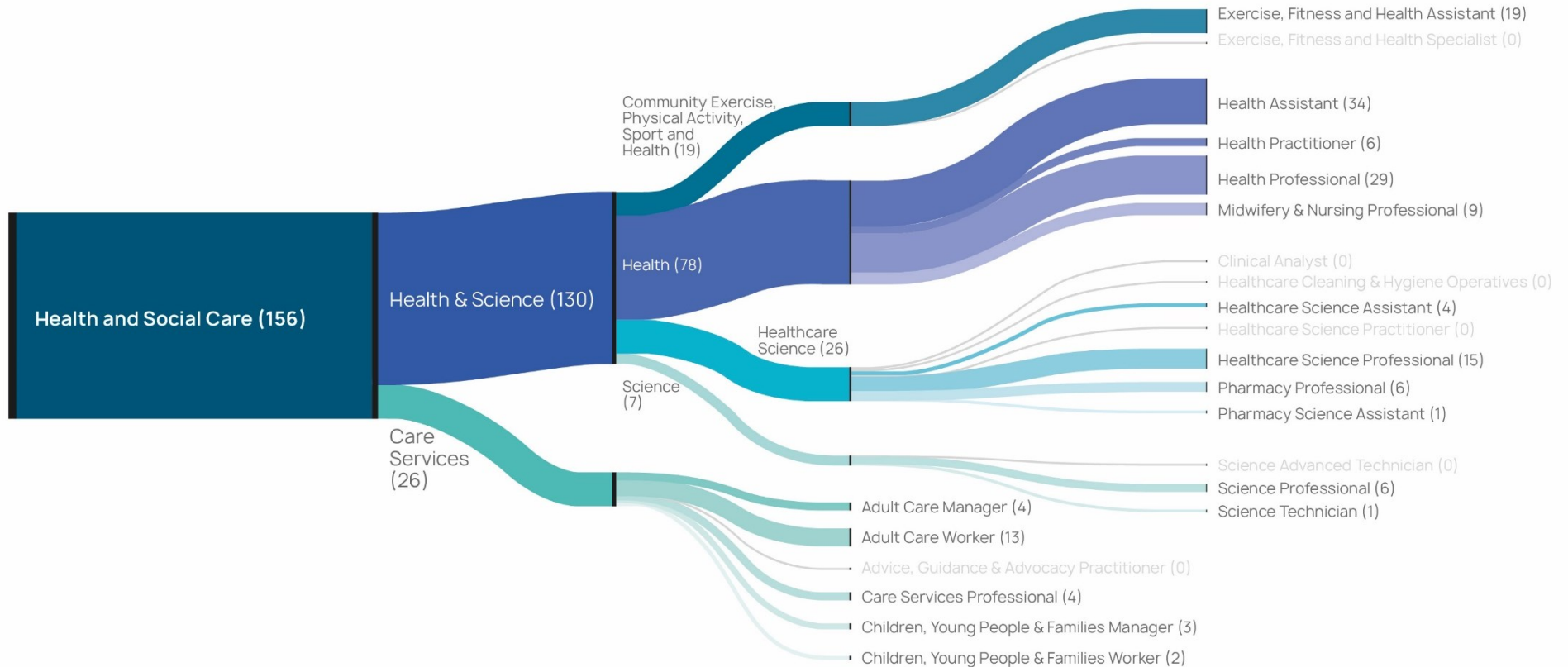
Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (V)

Sector	Sub-sector	Level	Course	Provider
Health	Midwifery and nursing professional	Professional occupations	Mental Health Nursing MN	University of Portsmouth
		Professional occupations	Nursing (Adult) BN	University of Portsmouth
		Professional occupations	Adult Nursing Practice BSc	Southampton Solent University
		Professional occupations	General Practice (Nursing and Allied Health Professionals) MSc	Southampton Solent University
		Professional occupations	BSc Mental Health Nursing	Southampton Solent University
		Professional occupations	Registered Nurse (NMC 2018) Degree Apprenticeship - Mental Health	Southampton Solent University
Healthcare science	Clinical analyst	Higher technical occupations	n/a	n/a
	Healthcare cleaning and hygiene operatives	Technical occupations	n/a	n/a
	Healthcare science assistant	Technical occupations	Level 2 Further Study in Health Science Professions	SHCG - Eastleigh College
		Technical occupations	Level 2 Science & Health	SHCG - Fareham College
		Technical occupations	Level 3 T Level Health Science	SHCG - Fareham College
		Technical occupations	Medical Science (Level 3)	City of Portsmouth College
	Healthcare science practitioner	Higher technical occupations	n/a	n/a
	Healthcare science professional	Professional occupations	BEng/MEng Biomedical Engineering	University of Southampton
		Professional occupations	BEng/MEng Medical Engineering	University of Southampton
		Professional occupations	BSc/MSci Biomedical Sciences	University of Southampton
		Professional occupations	BSc Cardiac Physiology	University of Southampton
		Professional occupations	Applied Biomedical Science Degree Apprenticeship BSc	University of Portsmouth
		Professional occupations	MSc Biomedical Engineering	University of Portsmouth
		Professional occupations	BSc Biomedical Science	University of Portsmouth
		Professional occupations	MSc Biotechnology	University of Portsmouth
		Professional occupations	Health informatics postgraduate research degree	University of Portsmouth
Professional occupations		Medical Biotechnology MSc	University of Portsmouth	
Professional occupations		Occupational Hygiene MSc	University of Portsmouth	
Professional occupations		Operating Department Practice BSc	University of Portsmouth	
Healthcare science	Professional occupations	Science and Health MRes	University of Portsmouth	
	Professional occupations	BSc Biomedical Science	Southampton Solent University	
	Professional occupations	Health, Nutrition and Exercise Science BSc	Southampton Solent University	

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (VI)

Sector	Sub-sector	Level	Course	Provider	
Healthcare science	Pharmacy professional	Professional occupations	BSc/MSci Pharmacology	University of Southampton	
		Professional occupations	Independent Prescribing for Pharmacists PgCert	University of Portsmouth	
		Professional occupations	Pharmacology BSc	University of Portsmouth	
		Professional occupations	Pharmacy MPharm	University of Portsmouth	
		Professional occupations	Pharmacy, pharmacology and biomedical sciences postgraduate research degree	University of Portsmouth	
		Professional occupations	Independent Prescribing Practice PGCert	Southampton Solent University	
	Pharmacy science assistant	Technical occupations			
		Technical occupations	Pharmacy Technician Apprenticeship (Level 3)	City of Portsmouth College	
Science	Science advanced technician	Higher technical occupations			
	Science professional	Professional occupations	BSc/MSci Biochemistry	University of Southampton	
		Professional occupations	BSc/MSci Biology	University of Southampton	
		Professional occupations	BSc/MSci Neuroscience	University of Southampton	
		Professional occupations	MChem Chemistry with Medicinal Sciences	University of Southampton	
		Professional occupations	Biochemistry BSc	University of Portsmouth	
		Professional occupations	Biology BSc	University of Portsmouth	
	Science technician	Technical occupations	Level 3 Laboratory Technician Apprenticeship	SHCG - Fareham College	

Appendix 2 – FE & HE provision mapped vs IfATE occupation maps (VII)



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