



INSTITUTE  
OF THE MOTOR  
INDUSTRY



# Automotive Industry Baseline Report

2019 - Revision



# Automotive Labour Market baseline report

## Introduction

This report seeks to give an overview of the current automotive labour market. Using EMSI data, it allows a view of industry and occupations in England, Scotland, Wales and Northern Ireland. Data is updated annually, so the most recent full year is 2019. For full detail on data sources and methodology, see appendix.

Data from EMSIE has been revised slightly and therefore the baseline profile has been updated to reflect this.

Data revisions include:

- Number of jobs by industry subsectors (SIC) for 2019 have been revised upwards by 41,000 jobs (5%).
- Number of jobs in industry subsectors (SIC) historic numbers have also been revised.
- Number of jobs by industry split by region has been revised.
- Number of jobs by industry subsectors (SIC) for 2019 have been revised.

Other changes to the report include:

- Removal of forecast in jobs. Although EMSI predicts forward trends to 2028, this forecast modelling was undertaken prior to the Covid-19 pandemic and therefore is likely to change significantly. As a result, it has been removed from this baseline report.
- The Baseline profile has moved focus to the automotive sector 'as a whole' rather than specifically focussing on the retail subsector.
- New statistics have been included comparing the profile of different automotive occupations.
- New measure of the proportion of occupations which are BAME is included.

## Key Statistics

- In 2019, there were 98,200 establishments in the automotive industry providing 831,170 jobs. Of this, 94,947 establishments are within subsectors outside of manufacturing (automotive retail) providing 659,374 jobs.
- The average wage for a job in the automotive industry is £30,728.
- The automotive industry contributes £33 billion gross value added (GVA) (2.5%) to the UK economy. Of which £23 billion gross value added by automotive retail industries.
- Over the past 10 years, the automotive industry has increased by 128,452 jobs. An increase of 18%. An increase of 1% in the past year.
- 39% of the automotive industry is aged 34 and under, with 16% aged 16 to 24.
- 81% of the automotive industry are male and 19% female.
- There are 211 registered occupations in the automotive sector.
- There were 202,132 vehicle technicians, mechanics and electricians, employed across all industries.
- All occupations in the sector are male dominated. The largest proportion of females is in the assembler's occupation which has 16% females.
- 17.5% of vehicle body builders and repairers are aged over 55.
- Garage managers and proprietors have the highest % of the workforce that are BAME.

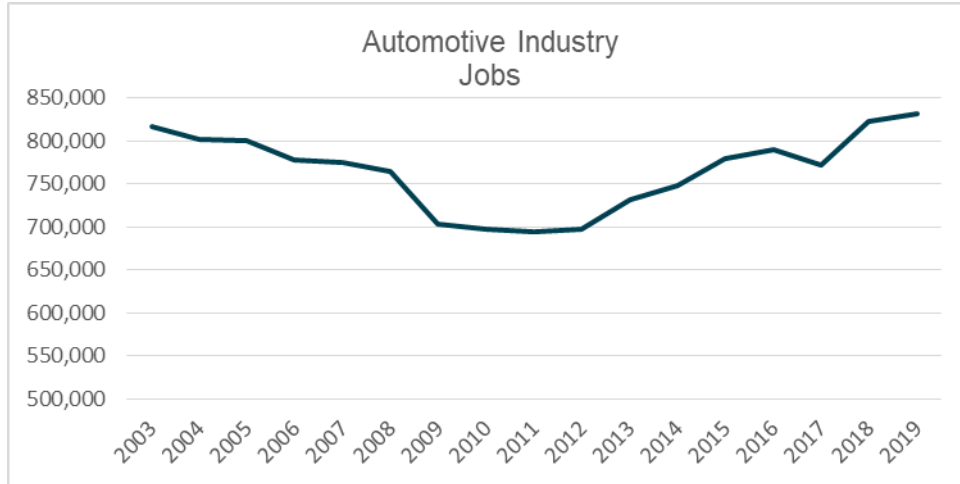
## Industry view

### Automotive Industry Breakdown - 2019

SIC	Description	2019 Establishments	2019 Jobs	Avg. Wages Per Job	GVA	GVA %
<b>Automotive (Retail)</b>						
4511	Sale of cars and light motor vehicles	21,799	202,310	£31,180	£7,927,932,917	0.61%
4519	Sale of other motor vehicles	1,429	16,439	£31,273	£521,851,158	0.04%
4520	Maintenance and repair of motor vehicles	50,153	253,990	£24,530	£8,233,486,700	0.63%
4531	Wholesale trade of motor vehicle parts and accessories	6,191	69,662	£28,357	£2,442,963,813	0.19%
4532	Retail trade of motor vehicle parts and accessories	5,895	38,396	£23,407	£1,059,978,459	0.08%
4540	Sale, maintenance and repair of motorcycles and related parts and accessories	2,180	10,667	£26,159	£352,832,628	0.03%
4677	Wholesale of waste and scrap	1,608	10,263	£27,745	£415,850,206	0.03%
7711	Renting and leasing of cars and light motor vehicles	4,692	47,720	£34,776	£1,927,768,937	0.15%
7712	Renting and leasing of trucks	999	9,926	£44,395	£527,590,277	0.04%
	<b>Subsector Total</b>	<b>94,947</b>	<b>659,374</b>	<b>£30,202</b>	<b>£23,410,255,095</b>	<b>1.8%</b>
<b>Automotive (Manufacturing)</b>						
2910	Manufacture of motor vehicles	954	87,467	£42,648	£6,201,391,431	0.48%
2920	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers	778	21,721	£28,192	£792,631,764	0.06%
2931	Manufacture of electrical and electronic equipment for motor vehicles	119	3,453	£25,006	£140,286,593	0.01%
2932	Manufacture of other parts and accessories for motor vehicles	1,402	59,154	£31,798	£2,781,508,120	0.21%
	<b>Subsector Total</b>	<b>3,253</b>	<b>171,795</b>	<b>£31,911</b>	<b>£9,915,817,908</b>	<b>0.8%</b>
	<b>Automotive Industry Total</b>	<b>98,200</b>	<b>831,170</b>	<b>£30,728</b>	<b>£33,326,073,003</b>	<b>2.6%</b>

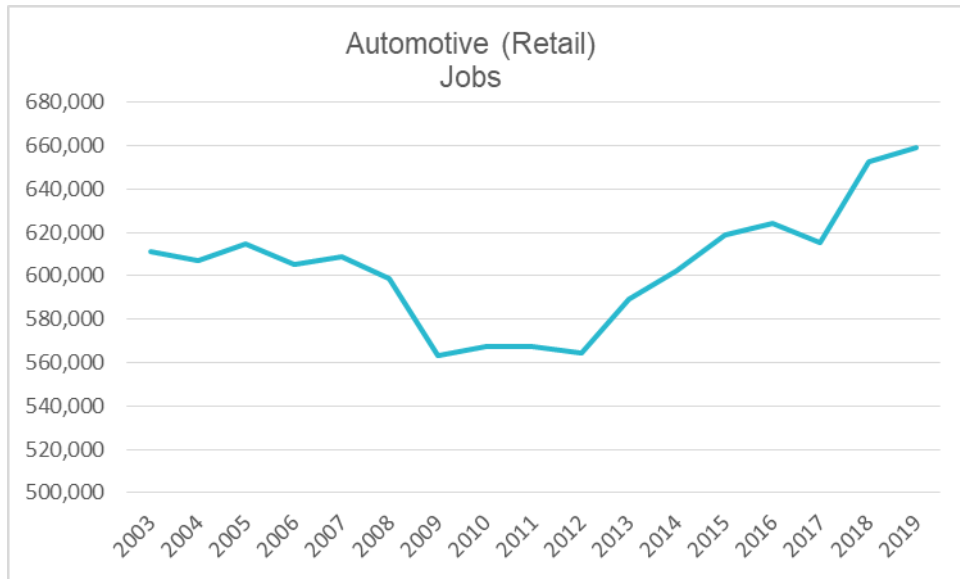
- In 2019, there were 98,200 establishments in the automotive industry providing 831,170 jobs. Of this, 94,947 establishments are within subsectors outside of manufacturing (automotive retail) providing 659,374 jobs.
- The average wage for a job in the automotive industry is £30,728. The highest average earnings are those working in the renting and leasing of trucks, which are £45,278. The average wage for working in Maintenance & Repair of Motor Vehicles is £24,530.
- The automotive industry contributes £33 billion gross value added (GVA) (2.5%) to the UK (England, Scotland, Wales, Northern Ireland) economy. Of which £23 billion gross value added by automotive retail industries.

Automotive Industry Breakdown – Jobs over time



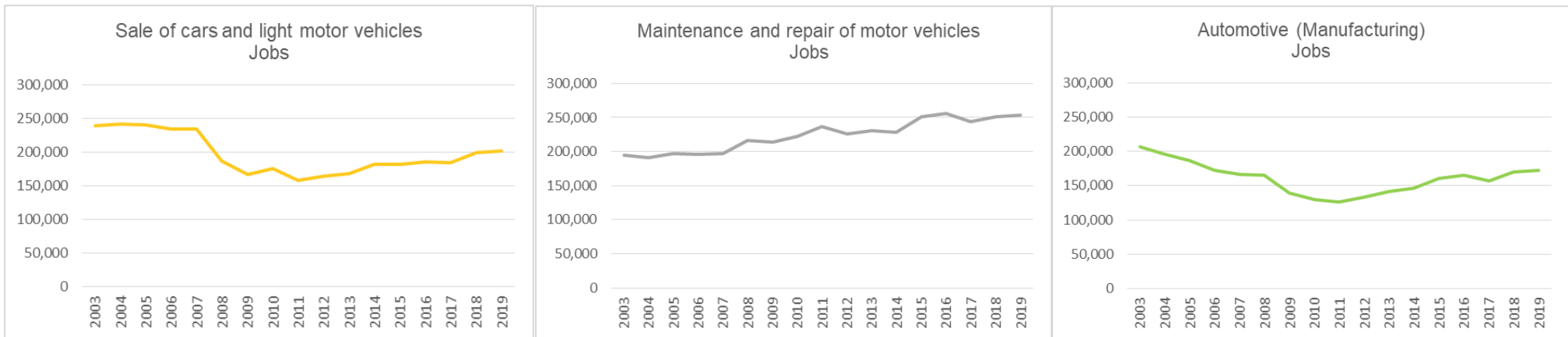
Time period	No.	% Chg
15 years	28,750	4%
10 years	128,452	18%
5 years	82,422	11%
Past year	8,882	1%

- Jobs in the automotive sector are at the highest they have been since 2003.
- Over the past 10 years, the automotive industry has increased by 128,452 jobs. An increase of 18%. An increase of 1% in the past year.
- Jobs were at the lowest point in 2011 when levels were at 694,322.



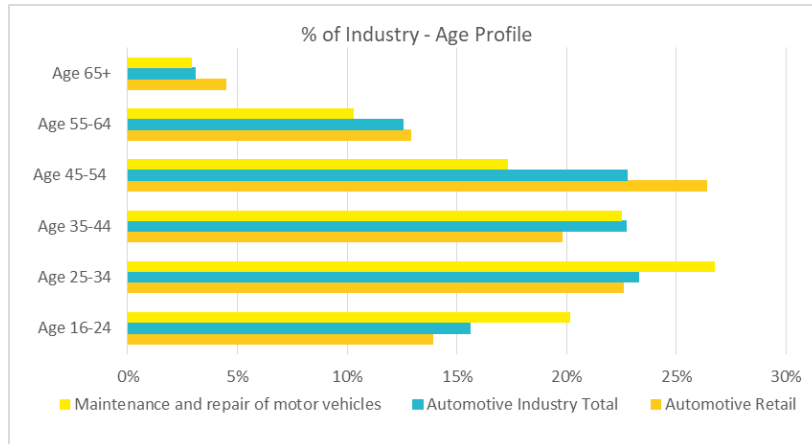
Time period	No.	% Chg
15 years	52,515	9%
10 years	96,331	17%
5 years	56,883	9%
Past year	6,953	1%

- Jobs in the automotive retail sector are at the highest they have been since 2003.
- Over the past 10 years, the automotive retail has increased by 96,331 jobs. An increase of 17%. An increase of 1% in the past year.



- Sale of cars and light motor vehicles jobs are currently 39,529 (16%) lower than the sector high in 2003.
- Over the past 10 years, the sale of cars and light motor vehicles jobs has increased by 34,903 jobs. An increase of 21%. An increase of 1% in the past year.
- Over the past 10 years, the maintenance and repairs of motor vehicles jobs has increased by 40,192 jobs. An increase of 19%. An increase of 1% in the past year.
- Maintenance and repairs of motor vehicles jobs did not see significant falls in the 2009-2011 period (previous UK recession period) when most other subsectors did.
- Automotive manufacturing jobs are currently 23,765 (12%) lower than the sector high in 2003.
- Over the past 10 years, the automotive manufacturing jobs has increased by 32,903 jobs. An increase of 23%. An increase of 1% in the past year.

## Industry Profile

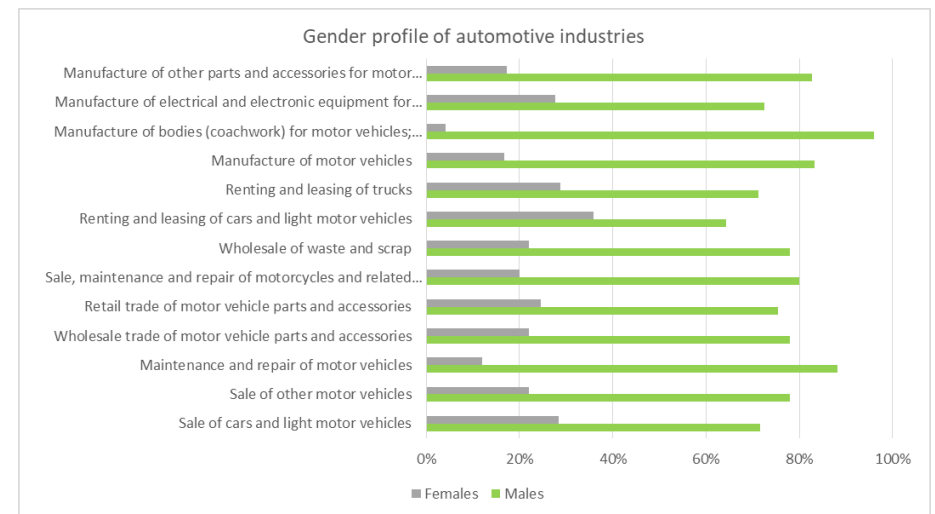


## Age Profile

- 39% of the automotive industry is aged 34 and under, with 16% aged 16 to 24. The largest age bracket in the industry is that of 25 to 34 year olds.
- The automotive retail subsector has an older age profile to the automotive industry as a whole.
- The maintenance & repair of motor vehicles industry has the youngest profile of the automotive industries.

## Gender Profile

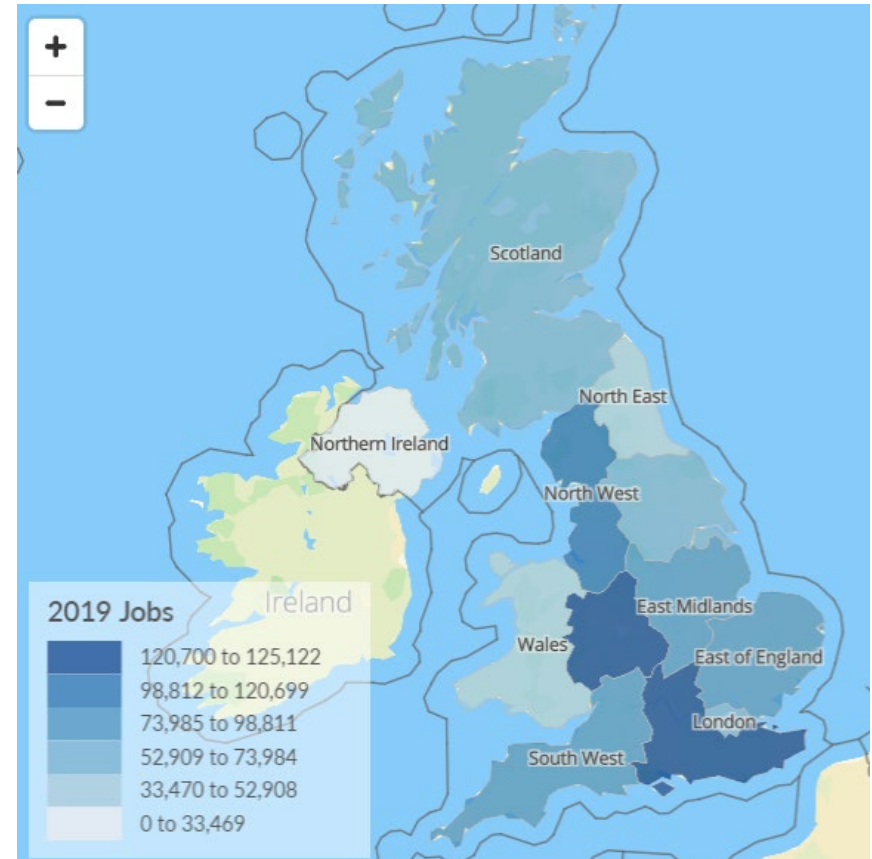
- 80% of the automotive industry are male and 20% female. Although predominantly male dominated, there are differences across individual automotive industries.
- The largest proportion of females is in the renting and leasing of cars and light motor vehicles, 36%.
- The largest proportion of males is in the manufacture of bodies (coachwork) for motor vehicles, manufacture of trailers and semi-trailers.



Regional Profile

Region	2019 Establishments	2019 Jobs	All Jobs (All industries)	% Automotive Industry jobs of all jobs in region
East Midlands	8,430	75,546	2,209,834	3%
East of England	10,991	80,246	2,889,701	3%
London	8,673	54,039	5,405,847	1%
North East	3,153	37,145	1,101,563	3%
North West	10,619	98,812	3,493,506	3%
Northern Ireland	3,190	20,455	962,369	2%
Scotland	6,161	52,909	2,539,949	2%
South East	14,178	120,700	4,348,793	3%
South West	9,481	73,985	2,603,730	3%
Wales	4,591	33,470	1,351,559	2%
West Midlands	10,102	125,122	2,632,007	5%
Yorkshire and The Humber	8,631	58,741	2,480,976	2%
	<b>98,200</b>	<b>831,170</b>	<b>32,019,833</b>	<b>3%</b>

- The largest proportion of jobs in the automotive industry is in the West Midlands (15%).
- The South East has the largest amount of establishments.
- Automotive jobs make up 3% of all UK jobs.
- There are significant regional differences in terms of automotive industries.
- Automotive jobs in the West Midlands makes up 5% of all jobs.





## Occupation view

### Top 20 Occupations in the 'All Automotive Industries'

SOC	Description	Employed in Industry Group (2019)	Median Hourly Wages	Education Level
5231	Vehicle technicians, mechanics and electricians	146,686	£12.48	Level 3 NVQ; A Levels
7115	Vehicle and parts salespersons and advisers	42,927	£10.50	Level 3 NVQ; A Levels
8212	Van drivers	29,674	£9.73	Level 2 NVQ; GCSE at grades A*-C
9236	Vehicle valeters and cleaners	27,411	£8.42	Level 1 NVQ; GCSE at grades D-G
4122	Book-keepers, payroll managers and wages clerks	25,883	£12.96	Level 2 NVQ; GCSE at grades A*-C
3545	Sales accounts and business development managers	23,991	£22.43	Honours, Bachelor's degree
9260	Elementary storage occupations	23,090	£9.83	Level 1 NVQ; GCSE at grades D-G
1252	Garage managers and proprietors	22,752	£15.84	Level 3 NVQ; A Levels
4159	Other administrative occupations n.e.c.	22,705	£11.32	Level 2 NVQ; GCSE at grades A*-C
8132	Assemblers (vehicles and metal goods)	22,448	£12.62	Level 2 NVQ; GCSE at grades A*-C
1190	Managers and directors in retail and wholesale	20,536	£13.29	Level 2 NVQ; GCSE at grades A*-C
5232	Vehicle body builders and repairers	20,418	£11.62	Level 3 NVQ; A Levels
7111	Sales and retail assistants	19,010	£8.79	Level 2 NVQ; GCSE at grades A*-C
8214	Taxi and cab drivers and chauffeurs	16,093	£9.43	Level 2 NVQ; GCSE at grades A*-C
4216	Receptionists	15,892	£9.42	Level 2 NVQ; GCSE at grades A*-C
5223	Metal working production and maintenance fitters	14,905	£14.66	Level 3 NVQ; A Levels
8135	Tyre, exhaust and windscreen fitters	13,892	£9.38	Level 2 NVQ; GCSE at grades A*-C
7219	Customer service occupations n.e.c.	12,689	£10.15	Level 2 NVQ; GCSE at grades A*-C
5250	Skilled metal, electrical and electronic trades supervisors	11,305	£16.12	Level 3 NVQ; A Levels
5234	Vehicle paint technicians	11,301	£12.06	Level 3 NVQ; A Levels
		<b>543,606</b>		

- The most popular occupation in the automotive industry is vehicle technicians, mechanics and electricians, employing 146,686. 18% of the industry.
- The top 20 occupations make up 65% of the automotive industry demonstrating the varied occupations in the industry. In fact, there are 211 registered occupations in the industry.

### Occupation focus

SOC	Description	Jobs 2019	Employed in automotive sector	Percentage of the workforce that are female (%)	Percentage of the workforce that are aged 55+ (%)	Percentage of the workforce that are BAME (%)
5231	Vehicle technicians, mechanics and electricians	202,132	146,686	1.3	12.6	6.1
7115	Vehicle and parts salespersons and advisers	48,980	42,927	8.8	10.2	6.9
9236	Vehicle valeters and cleaners	33,141	27,411	12.5	9.8	6.1
1252	Garage managers and proprietors	25,911	22,752	7.8	30.7	12.0
8132	Assemblers (vehicles and metal goods)	42,214	22,448	16.2	13.4	8.9
5232	Vehicle body builders and repairers	24,295	20,418	0.0	17.5	4.6
8135	Tyre, exhaust and windscreen fitters	14,773	13,892	0.1	7.4	11.3
5234	Vehicle paint technicians	13,929	11,301	0.0	11.1	x

- There were 202,132 vehicle technicians, mechanics and electricians' jobs in 2019. 55,446 employed outside of the Automotive Industry.
- There were 48,980 Vehicle and Parts Salespersons and advisers' jobs in 2019. 88% employed in the automotive sector.
- All occupations are male dominated. The largest proportion of females is in the assembler's occupation which has 16% females.
- 17.5% of vehicle body builders and repairers are aged over 55.
- Garage managers and proprietors have the highest % of the workforce that are BAME.

## Appendix

### Methodology and Data

Using EMSI data, it allows a view of industry, occupation and job postings over England, Scotland, Wales and Northern Ireland. Data is updated annually and so the most recent full year is 2019. The data gives us a full, contextualised view of the labour market. The industry data comprises all 563 industry and 369 occupation classifications across all regions of the country. 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 inverse 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, which EMSI combine to provide multi-layered cross-checking. The data is updated annually to give more than 20 million data points describing labour market conditions across Britain. For the purposes of this report, regional analysis, we have used Government Office Region.

Data is updated annually and so the most recent full year is 2019. Predications are forecast up to 2028. Forecast modelling was undertaken prior to the Covid-19 pandemic and therefore likely to significantly change. However, this provides a good baseline for judging the effects of Covid-19 going forwards and is included in this report for illustrative purposes.

For the purposes of this report, a number of level 4 SOC (the lowest level available) industries are grouped to establish the Automotive Retail subsector and an estimate of the automotive industry as a whole. These are outlined in each of the tables.

EMSI data includes data from England, Wales, Scotland, and for the first time this year - Northern Ireland.