



INSTITUTE OF THE
MOTOR INDUSTRY

Creating long-lasting careers in a changing sector

UK Automotive Sector Baseline Report 2022
Summary Report



Data Source: Emsi 2022.1 data [All data sourced from Emsi UK Analyst,
Career information taken from Emsi occupation data]

www.theimi.org.uk

INTRODUCTION

Our history

Founded in 1920, when 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 afoot in an ever-evolving world of automotive, IMI established themselves as the first automotive industry body in the UK, borne from a need to educate and train people working in an emerging automotive industry.

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.

Professional bodies are distinctive in that they are dedicated to furthering the advancement of a profession or occupation and supporting individual members working in that profession. Most concern themselves with one profession (eg law or dentistry) or one occupation (eg accounting technicians). The IMI is different in that it is dedicated to the advancement of the automotive sector, which covers many different subsectors and occupations. This makes defining and understanding the related labour market both a challenge and essential.

The sector faces its biggest skills challenge in the past two decades. With currently a record number of vacancies across the sector and the task to meet the new skills required to meet the green agenda it is certainly a challenging time. Creating a more diverse and inclusive workforce is one way to tackle this issue as well as providing the support and training to equip the workforce to deliver the Government’s climate commitments.



Data & methods

The content of the report is generated using Emsi data, which gives a view of industry occupations in England, Scotland, Wales and Northern Ireland throughout the four nations. Data is updated annually, the most recent full year is 2021.

Emsi data gives 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 lenses. 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 (industry code) and SOC (occupation code), at National, Government Office Region, County/Unitary Authority and Local Authority levels. There are some limitations with using SIC and SOC as not all subsectors and occupations are easily distinguishable at 4 digit level. For example, for those working in the Heavy Vehicle subsector, there is no SIC (industry code) and so is included in the SIC 4520 (maintenance and repair of motor vehicles). There is also no separate SOC (occupation code) for HGV technicians - included within SOC 5231 (vehicle technicians, mechanics and electricians).

Job postings data allows us to review recruitment trends which describes skills trends requested by employers. The data is created from a collection of nine Government sources, describes labour market conditions across Britain. For the purpose of this report, we have used government office region for regional analysis. Government data is revised on a quarterly basis and updates historical data as well as current estimates. Most recent data for automotive has been significantly revised (10% reductions in some cases) mainly due to revised impact of the pandemic. As revisions are undertaken historically it does not affect reporting within this report, however care should be taken if comparing this report with previous editions.

All data used within this report is referenced to Emsi 2022.1 data sourced from Emsi UK Analyst.



Executive summary

The automotive sector continues to be imperative to the UK economy in terms of supplying 742,600 jobs to the labour market and contributing £37 billion to the UK economy.

Despite strong growth in the past 10 years, leading to an additional 93,000 new jobs in sector, the pandemic has significantly affected jobs in the past 2 years with 65,000 fewer jobs than in 2019. This is more acute with the automotive retail sector compared to manufacturing. The effect of the pandemic in the past 2 years has not been universal across all subsectors and it appears that some subsectors have been more greatly impacted than others. In fact three manufacturing subsectors have seen growth in the past 2 years (manufacture of motor cycles, other parts and bodies). All of these are not as heavily reliant on computer chips; it appears the other two manufacturing subsectors have been affected by the global chip shortage. In automotive retail, the subsector with the biggest loss of jobs in the past 2 years is the Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories which saw a 22% fall in jobs.

In the past 10 years there have been 93,000 new jobs in the sector, 9% of these are Vehicle Technicians, Mechanics and Electricians. Although small in numbers, the following have seen very large percentage growth over the past 10 years and maybe occupations to watch out for:

- Plastics Process Operatives
- Quality Assurance Technicians
- Quality Control and Planning Engineers

10% of the sector workforce are in senior roles, and number have increased by 15% in the past 10 years. 5 automotive occupations are indicated by some degree of labour turnover, the highest being vehicle technicians and body builders and repairers. This is supported by significant increase in recruitment demand in 2021, with active job posts for automotive occupations up 83% compared to 2020 and up 16% on 2019.

The number of technicians now qualified to work safely on electric vehicles is estimated at 24,500, the equivalent of 11% of technicians in the UK.

The decrease in jobs in the past 2 years has significantly changed the next 10 year forecast. Jobs are predicted to fall by 1% a loss of 5,487 jobs, however not all subsectors are predicting a fall in numbers. The subsector predicting the fastest growth (% terms not volume) is the manufacture of motorcycles, with predicted growth of 17% by 2031. All manufacturing subsectors are predicting increases in the next 10 years. The subsector predicting the largest fall is the Sale of Cars and Light Motor Vehicles with a fall of 6%.

Forecasts indicate that there will be an employment requirement of 99,400 jobs in the next 10 years across the 8 specific automotive occupations. 4070 will be new jobs and 95,331 will be employment replacement (due to retirement, migration and occupational mobility).

72% (71,357) of the employment demand is within the automotive sector and the remaining 28% (28,043) is required outside of the sector.

Of the 8 occupations, Vehicle Body Builders and Repairers have the largest predicted growth in new jobs, with 533 new jobs and growth of 2.5%. Garage Managers and Proprietors are predicted to need the proportional largest employment replacement, on average 4% of the jobs needing replacing.



DEFINING THE LABOUR MARKET

Locating the labour market

Automotive Retail			
SIC	Description	2021 Jobs	2021 Establishments
4511	Sale of Cars and Light Motor Vehicles	168,795	22141
4519	Sale of Other Motor Vehicles	13,896	1555
4520	Maintenance and Repair of Motor Vehicles	229,718	51313
4531	Wholesale Trade of Motor Vehicle Parts and Accessories	63,854	6009
4532	Retail Trade of Motor Vehicle Parts and Accessories	37,065	6195
4540	Sale, Maintenance and Repair of Motorcycles and Related Parts and Accessories	7,988	2108
4677	Wholesale of Waste and Scrap	9,215	1580
7711	Renting and Leasing of Cars and Light Motor Vehicles	40,013	4861
7712	Renting and Leasing of Trucks	8,274	955
		578,818	96,717

Automotive Manufacturing			
SIC	Description	2021 Jobs	2021 Establishments
2910	Manufacture of Motor Vehicles	77,700	953
2920	Manufacture of Bodies (Coachwork) for Motor Vehicles; Manufacture of Trailers and Semi-trailers	22,271	803
2931	Manufacture of Electrical and Electronic Equipment for Motor Vehicles	2,410	110
2932	Manufacture of Other Parts and Accessories for Motor Vehicles	59,657	1,420
3091	Manufacture of Motorcycles	1,739	55
		163,776	3,341

Specific Automotive Occupations		
SOC	Description	2021 Jobs
1252	Garage Managers and Proprietors	18,664
5231	Vehicle Technicians, Mechanics and Electricians	168,543
5232	Vehicle Body Builders and Repairers	21,011
5234	Vehicle Paint Technicians	11,595
7115	Vehicle and Parts Salespersons and Advisers	50,074
8132	Assemblers (Vehicles and Metal Goods)	43,486
8135	Tyre, Exhaust and Windscreen Fitters	12,129
9236	Vehicle Valeters and Cleaners	30,501
		356,003



Industry Subsectors (Retail) Part 1

Sale of Cars and Light Motor Vehicles (SIC: 4511)

Wholesale and retail sale of new vehicles which includes passenger motor vehicles, including specialised passenger motor vehicles such as ambulances and minibuses. As well as wholesale and retail sale of off-road motor vehicles like Jeeps.



Maintenance and Repair of Motor Vehicles (SIC: 4520)

Wholesale trade of all kinds of parts, components, supplies, tools and accessories for motor vehicles, such as tyres, ark plugs, batteries, lighting equipment and electrical parts.



Sale of Other Motor Vehicles (SIC: 4519)

Wholesale and retail sale of new and used vehicles, including lorries, trailers and semi-trailers, camping vehicles such as caravans and motor homes. 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 (SIC: 4531)

Wholesale trade of all kinds of parts, components, supplies, tools and accessories for motor vehicles, such as tyres, ark plugs, batteries, lighting equipment and electrical parts.



Industry Subsectors (Retail) Part 2

Retail Trade of Motor Vehicle Parts and Accessories (SIC: 4532)

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



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

Renting and leasing of cars and light motor vehicles includes 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 (SIC: 4540)

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

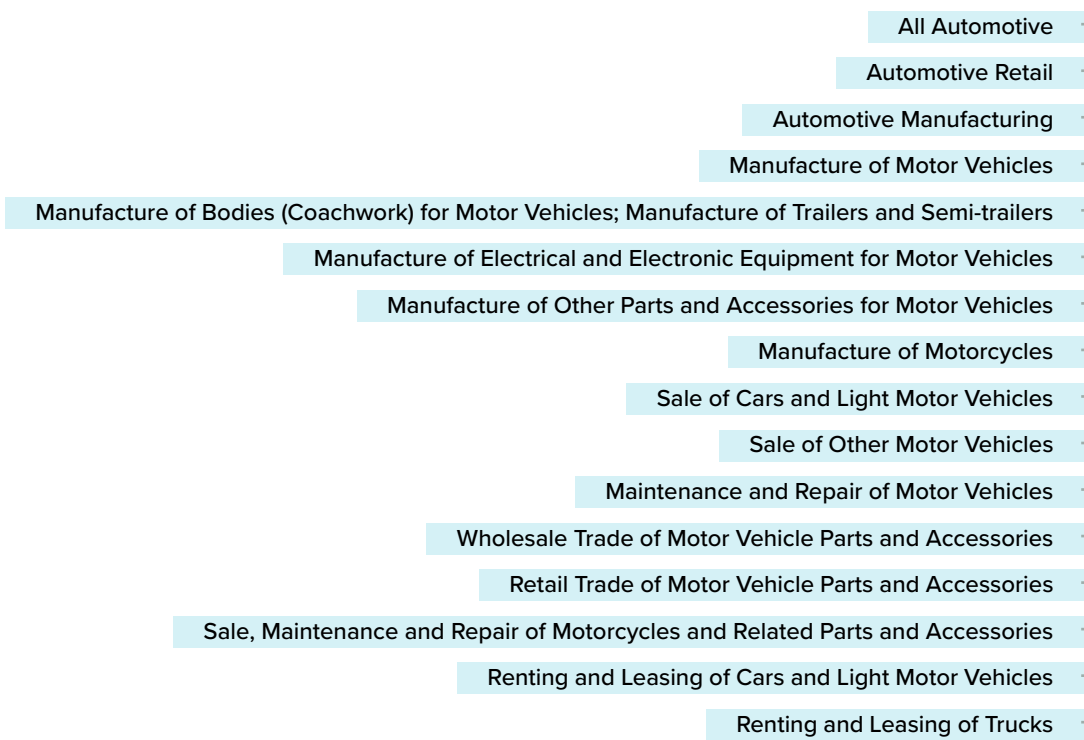


Renting and Leasing of Trucks (SIC: 7712)

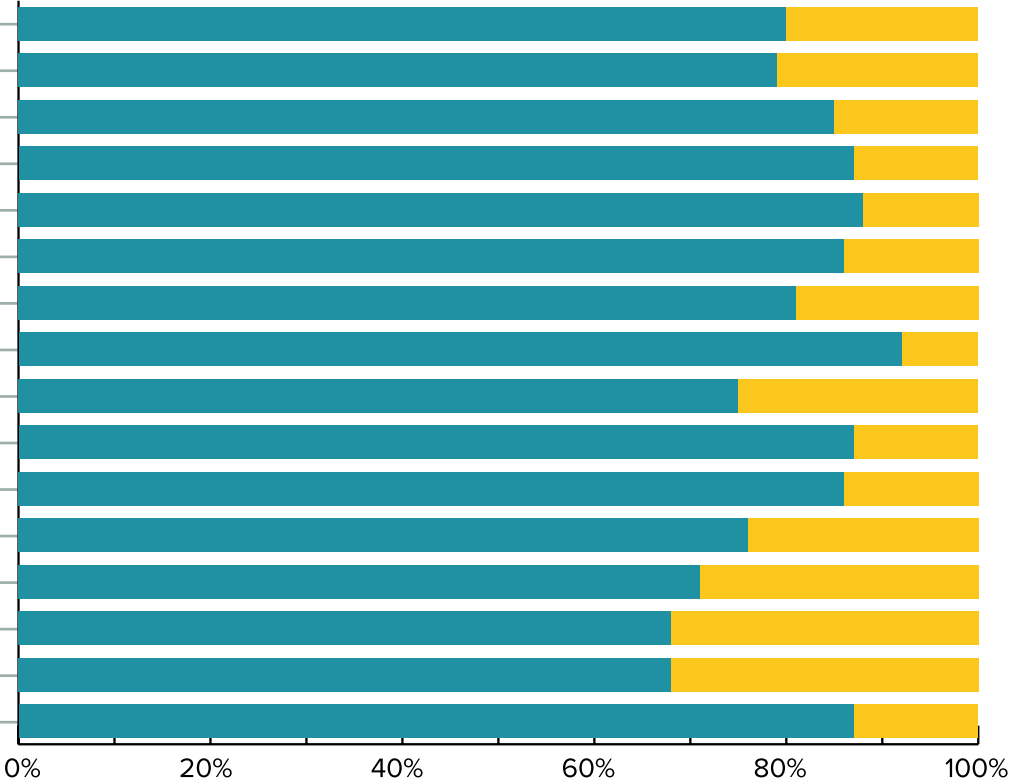
Renting and leasing of trucks includes the renting and operational leasing of trucks, utility trailers and heavy motor vehicles (of a weight exceeding 3.5 tonnes) and recreational vehicles.



Demographics of the sector



Gender

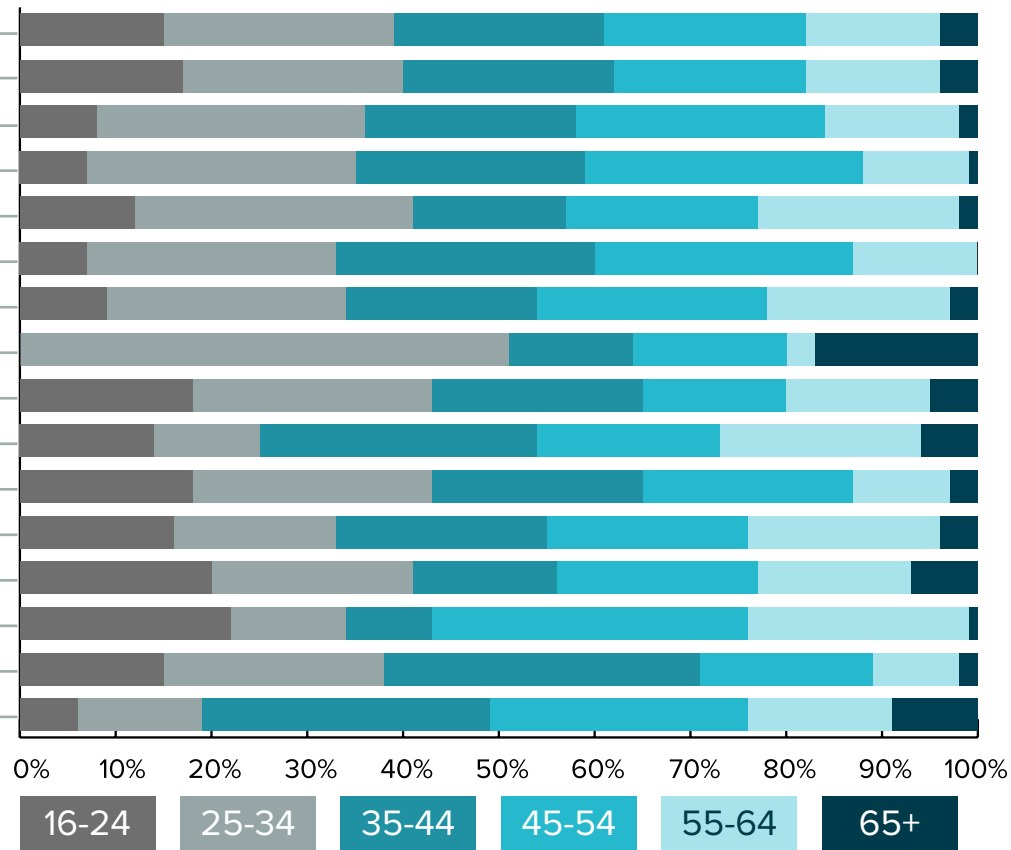


80% of the sector are male. The subsector with the largest proportion of males (92%) is the manufacture of motorcycles. Sale, maintenance and repair of motorcycles and related parts and accessories as the highest proportion of females, 32%.

Male
Female



Age Profile



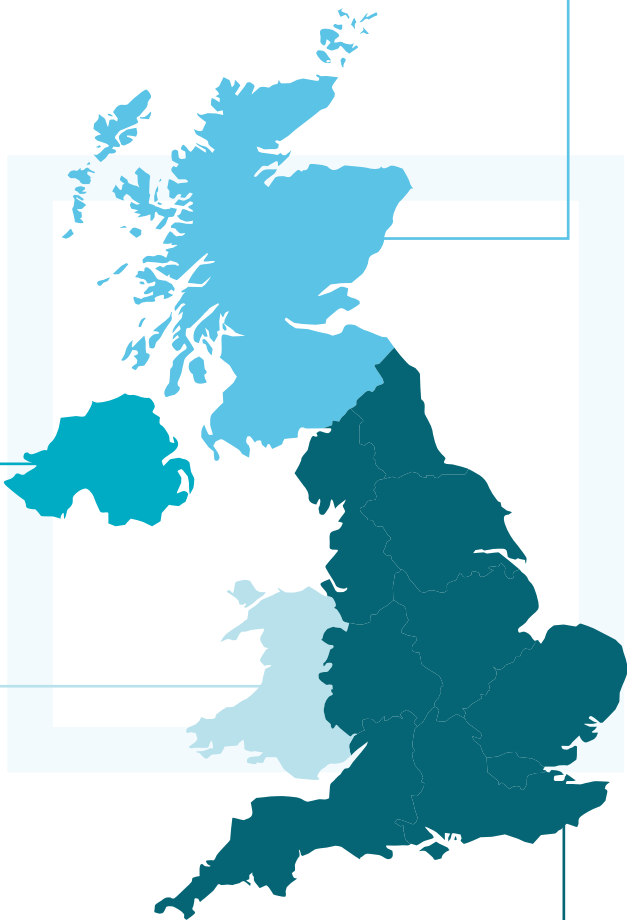
38% of the automotive sector are aged under 35 and 18% are over the age of 55. The sector with the youngest profile is the manufacture of motorcycles, where 51% of the subsector is under 35. The sale of other motor vehicle has the oldest profile with 26% of the sector over 55.

16-24 25-34 35-44 45-54 55-64 65+

Regional Profile

Northern Ireland	2021 Jobs	2021 Establishments	Avg. Wages Per Job
Retail	15,807	3,176	£23,350
Manufacturing	3,561	109	£24,136
	19,368	3,285	

Scotland	2021 Jobs	2021 Establishments	Avg. Wages Per Job
Retail	45,656	6,068	£27,079
Manufacturing	3,535	104	£37,037
	49,191	6,172	



85% of the automotive sector is based in England.

Average wages in England are higher than in the other three nations. Average wages in automotive manufacturing are higher than retail in all four nations.

Wales	2021 Jobs	2021 Establishments	Avg. Wages Per Job
Retail	23,318	4,414	£25,599
Manufacturing	11,129	170	£30,068
	34,447	4,584	

England	2021 Jobs	2021 Establishments	Avg. Wages Per Job
Retail	484,823	81,478	£28,597
Manufacturing	145,551	2,959	£37,789
	630,374	84,437	

Automotive Retail - Regions		
Region	2021 Jobs	2021 Location Quotient
South East	78638	1.03
North West	72122	1.15
East of England	64321	1.23
West Midlands	63686	1.31
South West	56982	1.23
Yorkshire and The Humber	46666	1.06
East Midlands	46433	1.22
Scotland	45656	1
London	37332	0.39
Wales	23318	0.99
North East	18643	0.96
Northern Ireland	15807	1.01
	569,604	

14% (78,600) of the automotive retail sector is based in the South East.

The location quotient is a way of quantifying how concentrated a particular industry or sector is when 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 automotive retail jobs in the region.



Occupations in sector

Top 20 Occupations in the Automotive Sector		
SOC	Description	2021 Jobs
5231	Vehicle Technicians, Mechanics and Electricians	116,260
7115	Vehicle and Parts Salespersons and Advisers	41,973
8212	Van Drivers	24,144
5223	Metal Working Production and Maintenance Fitters	23,284
3545	Sales Accounts and Business Development Managers	22,907
4159	Other Administrative Occupations n.e.c.	22,615
8132	Assemblers (Vehicles and Metal Goods)	22,228
9236	Vehicle Valeters and Cleaners	20,563
9260	Elementary Storage Occupations	18,239
5232	Vehicle Body Builders and Repairers	17,638
4122	Book-keepers, Payroll Managers and Wages Clerks	17,258
7111	Sales and Retail Assistants	16,572
4216	Receptionists	15,482
1190	Managers and Directors in Retail and Wholesale	15,124
1252	Garage Managers and Proprietors	14,246
8214	Taxi and Cab Drivers and Chauffeurs	12,125
8135	Tyre, Exhaust and Windscreen Fitters	11,530
1121	Production Managers and Directors in Manufacturing	10,265
7219	Customer Service Occupations n.e.c.	10,262
5234	Vehicle Paint Technicians	9,697
		462,411





The occupation with the largest number of jobs in the industry is vehicle technicians, mechanics and electricians (116,260) with 16% of the jobs in the sector. The second highest is vehicle and parts salespersons and advisers (41,973) with 6% of the jobs in the sector. 62% of industry in the top 20 occupations.

There is significant diversity across the industry in terms of occupations; there are 218 different occupations in the automotive sector. For example, the sector employs 15,482 receptionists.



There are 8 automotive occupations (highlighted in blue) which by their nature involve either working in or directly supporting the industry. These are either manufacturing, maintaining or selling automotive vehicles.

Specific Automotive Occupations Part 1



Vehicle Technicians, Mechanics and Electricians (SOC: 5231)

Employed in the Automotive sector	116,260	15% Over 55	168,500 Jobs	Level 3 NVQ; A Levels Education level
Employed outside	52,283			
Total	168,543			
<div><div>100% Male</div><div>0% Female</div><div>Note: 0% does not indicate that there are no female technicians but that there are less than 0.5%.</div></div>				



Vehicle Valeters and Cleaners (SOC: 9236)

Employed in the Automotive sector	20,563	14% Over 55	30,500 Jobs	Level 1 NVQ; GCSE at grades D-G Education level
Employed outside	9,938			
Total	30,501			
<div><div>89% Male</div><div>11% Female</div></div>				

Vehicle and Parts Salespersons and Advisers (SOC: 7115)

Employed in the Automotive sector	41,973	15% Over 55	50,100 Jobs	Level 3 NVQ; A Levels Education level
Employed outside	8,101			
Total	50,074			
<div><div>92% Male</div><div>8% Female</div></div>				



Assemblers (Vehicles and Metal Goods) (SOC: 8132)

Employed in the Automotive sector	22,228	14% Over 55	44,900 Jobs	Level 2 NVQ; GCSE at grades A*-C Education level
Employed outside	21,258			
Total	43,486			
<div><div>82% Male</div><div>18% Female</div></div>				





Specific Automotive Occupations Part 2



Vehicle Body Builders and Repairers (SOC: 5232)

Employed in the Automotive sector	17,638	24% Over 55	21,000 Jobs	Level 3 NVQ; A Levels Education level
Employed outside	3,373			
Total	21,011			
<div><div> 100% Male</div><div> 0% Female</div><div>Note: 0% does not indicate that there are no female technicians but that there are less than 0.5%.</div></div>				



Garage Managers and Proprietors (SOC: 1252)

Employed in the Automotive sector	14,246	27% Over 55	18,700 Jobs	Level 3 NVQ; A Levels Education level
Employed outside	4,418			
Total	18,664			
<div><div> 89% Male</div><div> 11% Female</div></div>				

Tyre, Exhaust and Windscreen Fitters (SOC: 8135)

Employed in the Automotive sector	11,530	4% Over 55	12,100 Jobs	Level 2 NVQ; GCSE at grades A*-C Education level
Employed outside	599			
Total	12,129			
<div><div> 99% Male</div><div> 1% Female</div></div>				

Vehicle Paint Technicians (SOC: 5234)

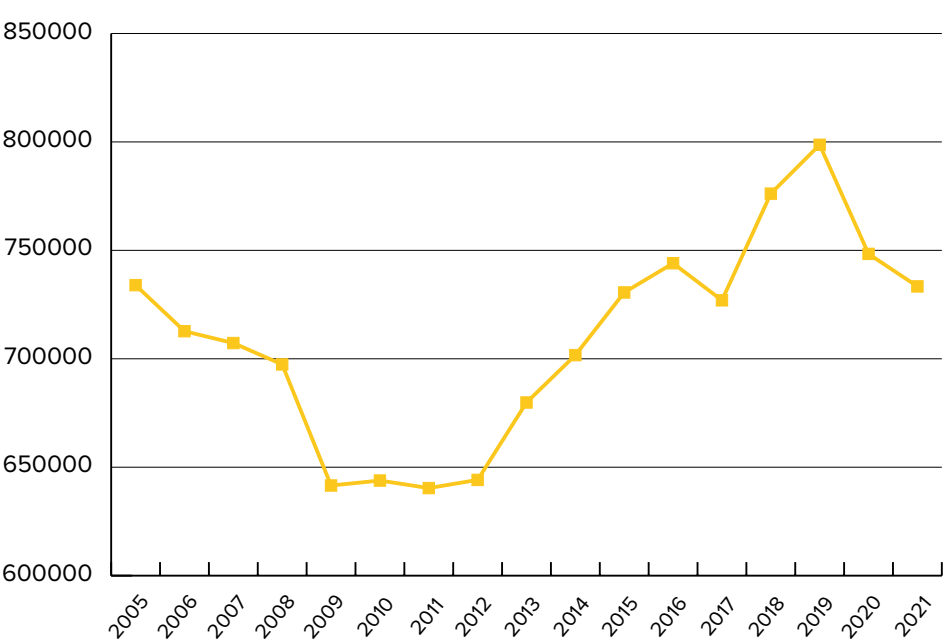
Employed in the Automotive sector	9,697	6% Over 55	11,600 Jobs	Level 3 NVQ; A Levels Education level
Employed outside	1,898			
Total	11,595			
<div><div> 95% Male</div><div> 5% Female</div></div>				



THE CHANGING PICTURE

Industry Trends

The number of jobs in the automotive sector over time (2005-2021)



Despite strong growth in the past 10 years, leading to an additional 93,000 new jobs in sector, the pandemic has significantly affected jobs in the past 2 years with 65,000 fewer jobs than in 2019.

2021 saw jobs fall by 2% in the past year, and are currently at 2017 levels.

Includes those in both retail and manufacturing sub-sectors.

ROBUST GROWTH IN THE PAST 10 YEARS

92,998
new jobs in the automotive sector in the past 10 years

65,301
fewer jobs in past 2 years

-2%
fall in jobs in the past year





Data Source: Emsi 2022.1 data [All data sourced from Emsi UK
Analyst, Career information taken from Emsi occupation data]



INSTITUTE OF THE
MOTOR INDUSTRY

www.theimi.org.uk