



Market Report

A Snapshot of your Market Sector

Health & Safety Training

This pack has been designed to provide information on setting up a business in the **Health & Safety Training** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **January 2024**. If you find the information contained in this document useful, tell us about it! Send us feedback [here](#); we will use your comments to help improve our service.

What do I need to know about the Health and Safety Training market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ In **2021**, the UK market for **occupational health provision increased in value by an estimated 3% to £1.06 billion**. According to MBD that **market value will grow by a cumulative 11%, or £120 million, between 2022 and 2026**, with **Outsourced Service providers** accounting for **£681million** by 2026, **In-House Corporate** provision reaching **£327million** and the **NHS £190million**. (Intel, *Occupational Health UK*, May 2022).
- ◆ In 2019-20, 38.8 million working **days were lost** thanks to **work-related ill health and non-fatal workplace injuries**, though this fell to **36.8 million in 2021-22**. Over the five years through **2028-29**, occupational health & safety services industry revenue is **forecast to climb at a compound annual rate of 0.8% to reach £1.8 billion**. **Compliance Assistance** is estimated to account for the largest share of industry revenue in 2024, at **£565.1million (33.5%)**. **Health & Safety Training** is expected to account for **£251.3million (14.9%)**. (IBISWorld, *Occupational Health & Safety Services in the UK*, December 2023).
- ◆ The latest report from Health & Safety Executive UK for Scotland reported that **136,000 workers in Scotland suffer from work-related ill health annually**, 59% of which are due to stress, depression, or anxiety. Musculoskeletal disorders represent 24%, and there are 40,000 non-fatal injuries each year. Notably, Scotland's workplace fatality rate is higher than Great Britain's, with 26 deaths in 2022/23. **The costs of Scottish workplace injuries and ill health amounted to £1.9 billion in 2022-23**. (HSE, [Workplace health and safety statistics for Scotland](#), 2023).
- ◆ According to the Institute of Occupational Safety and Health (IOSH) 2022-23 Annual Report, 'the adoption by the International Labour Organization of a safe and healthy working environment as a fundamental principle and right at work means that **OSH professionals will become progressively more important in corporate accountability and strategic thinking**.' IOSH stated that over 900 000 delegates trained on IOSH courses in 2022-23. (IOSH, [Getting the Fundamentals Right: IOSH Group Annual Report and Accounts](#), 2022-23).(www.iosh.com).
- ◆ The national organisations for this industry are [The Institute of Occupational Safety and Health](#), [Health and Safety Executive Scotland](#) and the [British Safety Industry Federation](#). Other industry bodies include [International Safety Equipment Association](#), [The Royal Society for the Prevention of Accidents](#) the [British Safety Council](#) and the [European Agency for Safety and Health at Work](#).

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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Mintel – Occupational Health UK (May 2022).** With more people now working remotely, OH professionals must ensure that they adapt their services to fit these new working trends. Visits to an office or headquarters are no longer as viable as previously, since fewer employees may be on-site, and therefore the employee drive for virtual health consultations should be met by an increase in the supply of such services. The greater move to hybrid working patterns has also increased the importance of workspace ergonomics. Without proper ergonomics, workers can suffer back, neck, wrist, and pelvic pain.
- ◆ **IBISWorld – Occupational Health & Safety Services in the UK (December 2023).** Despite economic disruptions, the reduction in unemployment has meant many new staff have required training. From October 2015, self-employed individuals whose work poses no potential risk to other workers' or public members' health and safety were exempted from health and safety regulations, which has dampened some aspects of industry demand, but a clear trend in decreasing unemployment until 2022 aided demand for OH services as rising employment levels boost the need for health and safety training sessions.
- ◆ **IBISWorld – Corporate Wellness Services in the UK (August 2023).** The corporate wellness industry has rebounded after the pandemic, with an anticipated 3.0% growth rate in 2023-24, however, poor economic conditions, including high inflation in the two years through 2023-24, have caused businesses to cut their spending budgets, reducing industry demand. Higher levels of health consciousness, recovering unemployment levels, efforts by businesses to enhance productivity by reducing the costs of poor health, and growth in the online delivery of industry services will boost demand. Britain's ageing workforce and greater emphasis on tackling mental health problems will aid growth.

There are also a number of online resources you may find helpful:

- ◆ The **Health & Safety Executive** provides information on latest [health and safety statistics for Scotland](#), training, events and a [list of relevant organisations](#) in Scotland.
- ◆ **Mygov.scot** – offers advice for businesses about [health and safety at work](#), as well as providing links to other relevant organisations.
- ◆ **Royal Society for the Prevention of Accidents (RoSPA)** (www.rospace.com) provides information about training courses and has resources for Risk Management and workplace training. It also offers a page with links to providers of [accident statistics](#).
- ◆ **UK Government – Employer Skills Survey 2022** reported that “Three-fifths (60%) of employers had provided training for their staff in the last 12 months, a decrease from 66% in 2017. Half of all employers (49%) provided on-the-job training (down from 53% in 2017) and 39% provided off-the-job training (down from 48% in 2017). The average investment in training per employee was £1,780, compared to £2,010 in 2017 (accounting for inflation).”

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#) ,[Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these website, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing. Publications are also available at [Statistics and Research](#).
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.

How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

We hope you find this Market Report useful and we'd love to hear your feedback [here](#).

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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