Appendix 1

Business

Employee Jobs

Nomis's 'Local Authority Profiles – time series' – shows total employee jobs figure estimates of 38,000 in 2015 and 2016; and 39,000 in 2017 and 2018. In 2019 total employee jobs increased to 40,000. During 2020 total employee jobs dropped back to 2015/2016 levels of 38,000, likely as a result of the Covid-19 pandemic. The reduction in employee jobs was more marked in Burnley -5% compared to the North West -2.5% and GB – 1.9%.

The table below shows that in 2020, the biggest employment sectors within Burnley were 'wholesale and retail trade, repair of motor vehicles and motorcycles' (21.1%) and Manufacturing (also 21.1%). 'Human health and social work activities' was third at (15.8%). The figures show an increase in the number of manufacturing jobs (7,000 in 2019 and 8,000 in 2020) and the proportion of employment in the manufacturing sector 21.1% is still significantly higher than the Northwest proportion of 9.7% and the England and Wales proportion of 7.9%. The increase in manufacturing jobs was offset by a decrease in Health and Social Care Work which is surprising. Other sectors seeing reductions in employee numbers were both sectors affected by the pandemic – Arts, Recreation and Leisure, and Construction. These are short timescales to detect any meaningful trends. The data for 2021 will not be available until November 2022.

Table 1: Employee Jobs (2020)

Employee jobs (2020)	Burnley (Employee Jobs)	Burnley (%)	North West (%)	Great Britain (%)
Total Employee Jobs	38,000	-	-	-
Full-Time	27,000	71.1	67.7	67.9
Part-Time	11,000	28.9	32.3	32.1
Employee Jobs By Industry				
B : Mining And Quarrying	0	0.0	0.1	0.2
C : Manufacturing	8,000	21.1	9.7	7.9
D : Electricity, Gas, Steam And Air Conditioning Supply	20	0.1	0.6	0.5
E : Water Supply; Sewerage, Waste Management And Remediation Activities	175	0.5	0.7	0.7
F : Construction	1,250	3.3	4.2	4.8
G : Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	8,000	21.1	16.7	14.9
H : Transportation And Storage	1,750	4.6	5.0	5.1
I : Accommodation And Food Service Activities	2,000	5.3	6.8	7.2
J : Information And Communication	500	1.3	3.1	4.5
K : Financial And Insurance Activities	500	1.3	2.6	3.5
L : Real Estate Activities	800	2.1	1.6	1.8
M : Professional, Scientific And Technical Activities	1,500	3.9	8.9	8.7
N : Administrative And Support Service Activities	2,000	5.3	8.4	8.8
O : Public Administration And Defence; Compulsory Social Security	900	2.4	4.6	4.6
P : Education	3,000	7.9	8.5	9.0
Q : Human Health And Social Work Activities	6,000	15.8	14.4	13.6
R : Arts, Entertainment And Recreation	1,000	2.6	2.2	2.2
S : Other Service Activities	700	1.8	1.8	1.9

Source: ONS Business Register and Employment Survey : open access
- Data unavailable
Notes: % is a proportion of total employee jobs excluding farm-based agriculture
Employee jobs excludes self-employed, government-supported trainees and HM Forces
Data excludes farm-based agriculture

Businesses and Enterprises

The table below identifies the number of enterprises and units in the borough since 2012. An enterprise can be thought of as the overall business, made up of all the individual sites or workplaces. It is defined as the smallest combination of legal units (generally based on VAT and/or PAYE records) that has a certain degree of autonomy within an enterprise group. A local unit is an individual site (for example a factory or shop) associated with an enterprise. It can also be referred to as a workplace. Since 2014, the number of enterprises and local units across the borough has grown significantly. In 2020 an annual drop in the number of enterprises and local units was recorded, but this did not fully reverse the strong growth seen in 2019. In 2021 there were very minimal changes from 2020, and compared with longer term, despite the ongoing Covid-19 pandemic. Notable, are the reductions in medium sized enterprises, yet there have been no corresponding redundancies reported – this may be a result of mergers or companies downsizing rather than closing.

Table 2: Enterprises by Size 2012 - 2021

	Number of Enterprises Burnley										Burnley (%)									
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Micro (0 to 9)	1,860	1,795	1,875	2,105	2,135	2,210	2,180	2,590	2,295	2,305	86.0	84.5	85.1	86.3	86.4	86.1	86.2	87.7	86.9	87.3
Small (10 to 49)	255	280	275	275	275	295	290	295	275	270	11.7	13.2	12.6	11.4	11.2	11.5	11.4	10.0	10.4	10.2
Medium (50 to 249)	40	40	45	50	45	50	50	55	50	50	1.9	1.9	2.0	2.0	1.9	2.0	1.9	1.8	1.9	1.9
Large (250+)	5	10	10	10	10	10	10	15	15	15	0.3	0.4	0.4	0.3	0.5	0.4	0.5	0.5	0.6	0.6
Total	2,160	2,125	2,200	2,440	2,470	2,565	2,530	2,955	2,640	2,640	100	100	100	100	100	100	100	100	100	100

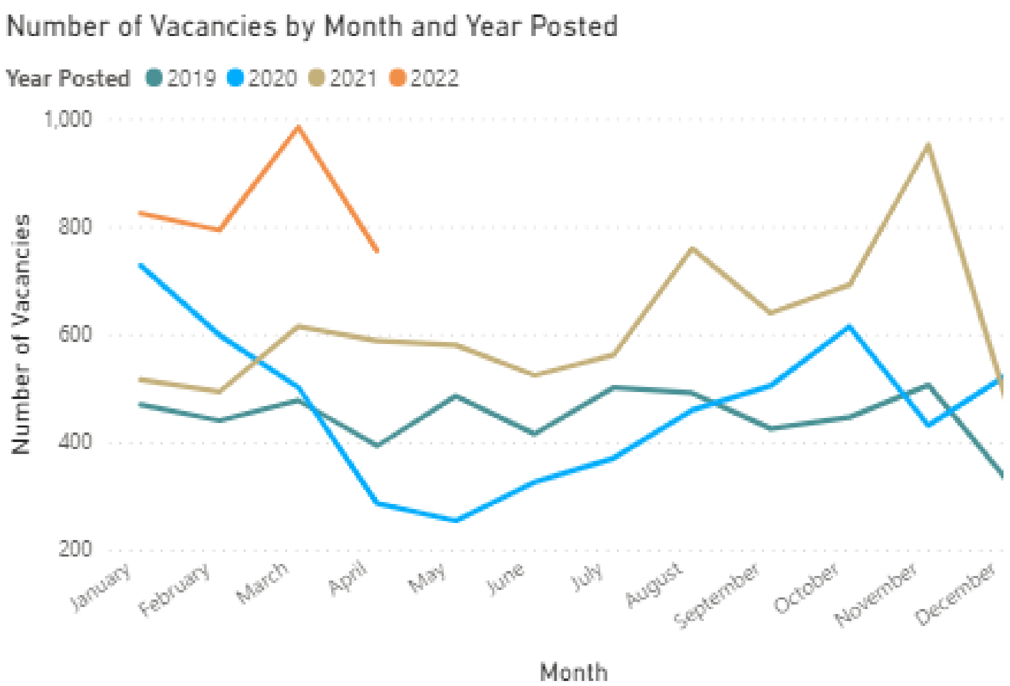
Source: Inter Departmental Business Register (ONS) Notes: % is as a proportion of total (enterprises or local units) 2021 All figures are rounded by ONS to avoid disclosure. Figures may not add up due to rounding

Vacancies

As part of its work monitoring the skills impact of the COVID 19 Pandemic, Lancashire Skills Hub has procured a data set from Burning Glass that enables us to monitor and track vacancies over time, by borough and by occupational type.

Table 3 below shows a significant increase in vacancies each month since January 2021 compared to the previous two years. This trend has continued into 2022.

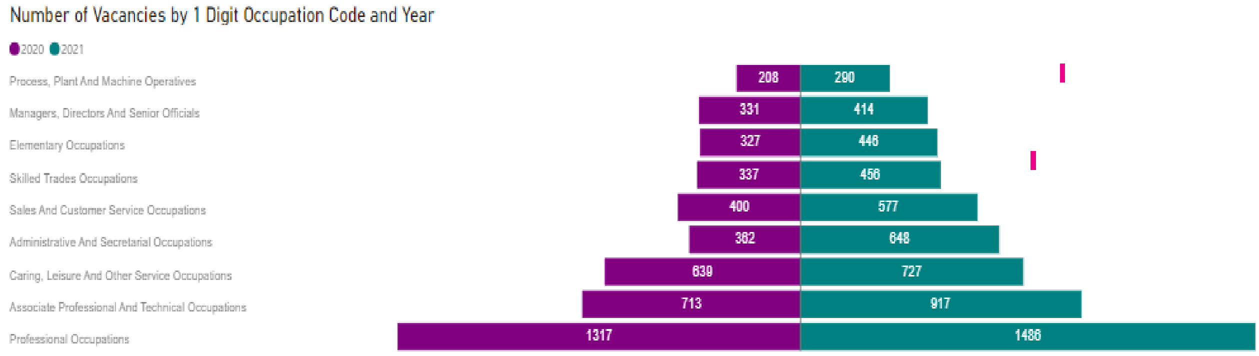
Table 3: Number of Vacancies by Month and Year Posted



Source: Lancashire Skills Hub

Table 4 below shows the number of vacancies in Burnley by occupational type in 2020 and 2021. This shows a clear increase in vacancies across all sectors during 2021 as the economy has started to recover. The high number of vacancies in Professional Occupations is notable. Data shows that this trend is continuing in 2022 with over 3356 vacancies posted in the year to end of April compared with 2212 in the same period in 2021. A sectoral breakdown shows a very high level of vacancies in the education sector

Table 4: Number of Vacancies by 1 Digit Occupation Code and Year



Source: Lancashire Skills Hub

Our intel from the Council's Business Contact Service indicates that a wide range of businesses across all sectors are experiencing significant issues with vacancies, a lack of suitable candidates and a high level of churn within the work force.

People

Unemployment

Claimant Count

The ONS Claimant Count statistics, published by ONS, includes the number of people claiming benefits principally for the reason of being unemployed. This is measured by combining the number of people claiming Job Seeker's Allowance (JSA) and National Insurance Credits with the number of people receiving Universal Credit principally for the reason of being unemployed. These statistics are still being developed by the Department for Work and Pensions and for this reason, the Claimant Count is currently designated as 'Experimental Statistics'.

Under Universal Credit, a broader span of claimants are required to look for work than under the old Jobseeker's Allowance. Universal Credit was rolled out earlier in Burnley than in many other parts of the country and this can be seen in a rise in claimant rates in Burnley compared to regional national levels from 2016.

In Feb 2020, in Burnley, the Claimant Count rate was 5.3% (2850), compared with 3.7% in the North-West and 3.0% in Great Britain.   The claimant rate rose to 9.2% (4950) in February 2021 and has continued to decline since then and in May 2022 was 5.6% (2,995) which is comparable with the pre-covid rate. In the later part of 2021 there was a slight increase in claimants in older age groups, although not to the extent that had been expected following the end of the Furlough scheme in October and the figures have fallen in line with all age groups in the first quarter.

It was expected that young people would be most badly affected by the economic impact of the pandemic. Burnley had a very high pre-pandemic youth (18 – 24) unemployment rate at 8.9% in February 2020 compared with 5.2% in the North West and 4.3% in Great Britain. The 18-24 claimant count rose to over 15% in May 20 and remained at these levels until May 21 when it started to decline, reflecting the national trend. In May 2022 the Youth Employment rate had reduced to 8.3%

slightly lower than the pre-pandemic level but remains persistently high in comparison to the North West and Regional figures.

Universal Credit (UC) Claims

UC claimants peaked at 13,719 in August 21. Figures have continued to fall to 12,275 claimants in April 2022 of which 61% are not in work.

Earnings

Average earnings of those who live in the borough (and may work in the borough or elsewhere) are significantly higher than for those who work in the borough (and may live in the borough or elsewhere). Wage levels both for residents and for those who work in the borough, remain below the levels for the region and for England and Wales as a whole.

Between 2020 and 2021 average annual resident-based earnings (mean) increased by just over 1%, in contrast to the Northwest which saw a 0.41% decrease and England and Wales which saw a 1.12% decrease.

Between 2020 and 2021 the average annual workplace income (mean) decreased by 4.6%, in contrast to the Northwest which saw a 0.34% decrease and England and Wales which saw a 1.2% decrease.

The marked difference in resident and workplace-based earnings show that an increasing number of residents are seeking work outside of the borough and that workplace earnings in the borough are not keeping up with more competitive economies. This may explain some of the recruitment difficulties faced by local businesses. The introduction of flexible working patters may have contributed to an increase in residents seeking employment outside of the borough.

Apprentices and Graduates

The table below shows apprenticeship starts and participation rates for the Burnley Constituency over the last 3 academic years. There has been a significant reduction in apprenticeship starts and participation over the pandemic.

Table 4: Apprenticeship Starts by Academic year and Level

		Starts			Participation			Achievements		
		2019/20	2020/21	2021/22	2019/20	2020/21	2021/22	2019/20	2020/21	2021/22
Burnley	**Intermediate Apprenticeship**	180	150	90	430	340	270	120	80	20
	Advanced Apprenticeship	310	260	110	830	720	540	180	160	40
	Higher Apprenticeship	130	160	40	290	340	270	40	60	10
	Total	620	580	240	1,510	1,380	1,080	340	290	70

Source: https://explore-education-statistics.service.gov.uk/find-statistics/apprenticeships-and-traineeships/2021-22

Whilst all areas of England saw a decline in Apprenticeship starts in academic year 20/21 the figures did recover to pre-pandemic figures in academic year 21/22. This has not been the case in Burnley. The decline in Advanced and higher Apprenticeships is significant given that a key objective of the strategy is to raise skill levels. However, Burnley College report a significant increase in the uptake of high level academic based courses.

Data on entry to HEI's is not available for local authority districts only Unitary and County Councils.

Town Centre and Places

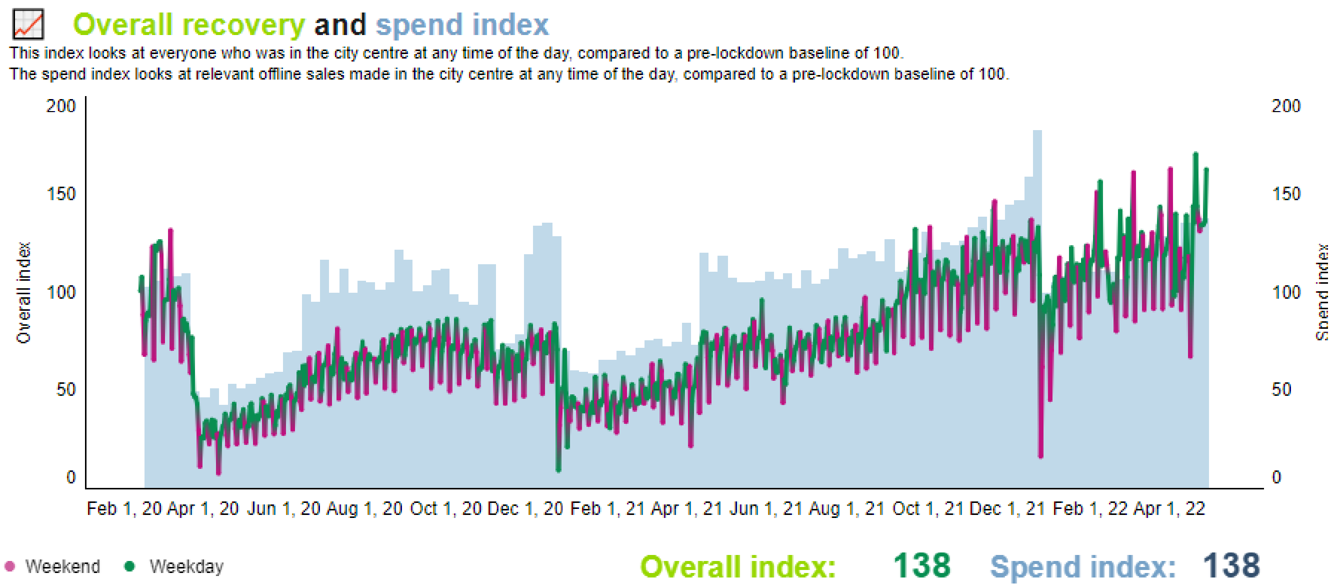
Centre for Cities High Streets Recovery Tracker and town centre footfall

Throughout the pandemic we have continued to track footfall and spend in Burnley Town Centre using the Centre for Cities High Streets Recovery Tracker. This tracker monitors how quickly high streets in the UK's largest cities and towns are returning to previous levels of activity. The tracker uses anonymised mobile phone data from Locomizer and anonymised off line credit card spend data from Beauclair. The data is collected monthly and is presented as an index where 100 is pre-covid levels for that town or city.

The table shows that following the first lockdown in March 20 footfall and expenditure fell dramatically but rose over the summer period. It is notable that from August 2020 consumer spend in the town centre recovered to pre-covid levels much more quickly than footfall. This trend continued throughout 2021 with footfall figures finally recovering to pre-pandemic levels in the last quarter of 2021 before a significant drop in January 2022. These figures probably reflect the return of office workers with a brief break in the early part of 2022 as people were advised to work from home where possible.

Since the start of 2022 footfall has remained high but spend dropped slightly during February but has revered during April. By April 2022 the both footfall and spend index was 138 putting Burnley 5th and 7th out of 52 towns and cities nationally. Weekday day time footfall has increase significantly with the return of workers to offices and the evening economy has shown signs of recovery.

Table 5: Centre for Cities Overall Recovery and Spend Index



Source: Centre for Cities, High Street Recovery Tracker https://www.centreforcities.org/data/high-streets-recovery-tracker/

Visitor Economy

Based on information from Marketing Lancashire by Global Tourism Solutions (UK) Ltd, figures for Burnley's overall visitor numbers, as set out in the table below, showing the devastating impact of the pandemic on the visitor economy. Visitor numbers fell significantly from 2.5m visits in 2018 (data for 2019 is not available) to 0.65 million in 2020 as a result of the COVID-19 Pandemic. Visitor spend also decreased significantly between 2018 and 2020 with a corresponding decrease in the number of jobs although not all of the jobs would have been lost as many were supported through the furlough scheme. The reductions in total visitor numbers, day visitors and total visitor days was much higher in Burnley than in the rest of Lancashire. This may reflect the additional measures imposed on Burnley from August 2020, a lack of appreciation of the borough's outdoor offer and most significantly the restrictions on football match attendances.

Table 6: Burnley's Visitor Economy 2020

	2018	2020	Variance
Total Visitor Numbers (millions)	2.58	0.65	-74.8%
Day Visitors (millions)	2.36	0.58	-75.4%
Staying Visitors (millions)	0.22	0.08	-63.6%
Total Visitors Days (millions)	2.87	0.76	-73.5%
Visitor Days – staying visitors (millions)	0.51	0.18	-64.7%
Total Economic Impact (£millions)	£119.87	£34.52	-71.2%
Economic Impact day visitors (£millions)	£85.12	£21.86	-74.3%
Economic Impact staying visitors (£millions)	£34.74	£12.66	-63.6%
FTE Jobs supported	1,481	435	-70.6%
Accommodation Stock (bedspaces)	849	858	+1%
Serviced Accommodation Stock	776	777	+0.13%
Non-serviced accommodation stock	73	81	+11%

Source: STEAM/Marketing Lancashire