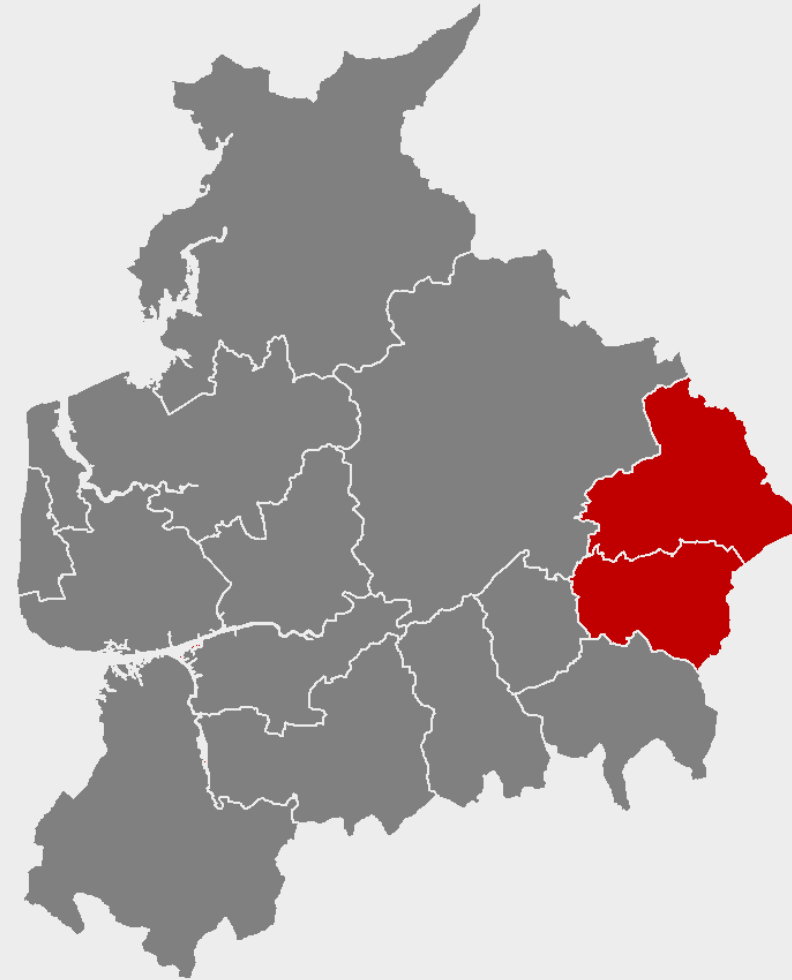




Lancashire
Enterprise Partnership

The Burnley and Pendle Labour Market Intelligence Report

*Part of the 2019 Lancashire Labour
Market Intelligence Toolkit*



European Union
European Social Fund
Investing in jobs and skills



The Lancashire Labour Market Intelligence Toolkit and Report Overview

This report is the **Travel to Work Area (TTWA) Labour Market Intelligence report for Burnley and Pendle**, part of the **2019 Lancashire Labour Market Intelligence (LMI) Toolkit**. It updates the information provided in the 2018 Toolkit and aligns with the Department for Education's (DfE's) Skills Advisory Panel (SAP) toolkit for local skills analysis.

Labour Market Intelligence is the term used to describe the wide range of information that helps inform decisions about work and training, covering topics such as jobs, salaries and employers, as well as education and skills.

The toolkit contains three parts:

- **LMI reports** – of which this is one - covering **six TTWA's¹ in Lancashire²**, alongside a stand-alone report covering **Lancashire**.
- **A data matrix** that contains all of the underpinning data which has been analysed to inform the LMI reports and the presentation packs. This includes time series data (typically for up to 10 years) and data for Local Authorities, the six TTWAs, Lancashire, and the national average³. The Matrix includes Local Authority and TTWA summary sheets which allow users to access summary charts and tables for their selected area.
- **Presentations** for each area, providing key labour market facts and figures for those who need them.

The report covers the four themes set out in the table below. Each theme includes a series of summary sheets, which provide key facts and figures, followed by more detailed analysis and commentary. Overviews and key messages are also provided.

REPORT COVERAGE	
Overview and Key Messages	Overview and Key Messages for Burnley and Pendle
Residents in Burnley and Pendle	This section provides data on the residents who live in Burnley and Pendle – their employment, occupations, skills and earnings. It also provides information on unemployment and inactivity. It covers the overall resident base including those who work within and outside the TTWA. <i>The underpinning data is available in the Resident Matrix which can be accessed on the Lancashire Skills Hub website</i>
The Economy in Burnley and Pendle	This section provides data on the jobs available at employers located in Burnley and Pendle. This includes jobs that are filled by residents from within and outside the TTWA. <i>The underpinning data is available in the Economy and Business Matrix which can be accessed on the Lancashire Skills Hub website</i>
Economic Forecasts for Burnley and Pendle to 2028	This section provides forecasts of the jobs expected to be available at businesses located in Burnley and Pendle in the 2018-2028 period. This includes jobs that could be filled by residents from within and outside the TTWA. <i>The underpinning data is available in the Economic Forecasts Matrix which can be accessed on the Lancashire Skills Hub website</i>
The Skills and Education System in Burnley and Pendle	This section provides data on provision, participation and attainment levels throughout the education system in Burnley and Pendle – from Key Stage (KS) 1 through to Higher Education. <i>The underpinning data is available in the Skills and Education System Matrix which can be accessed on the Lancashire Skills Hub website</i>

¹ TTWA represent labour markets in which the residents of each local area are most likely to work. Not all residents work in the TTWA in which they live.

² Throughout this report, the term 'Lancashire' is used to refer to the Lancashire Local Enterprise Partnership (LEP) area.

³ England excluding London is used as the national comparator, to remove the distorting effects of the London economy (which differs markedly from the rest of England) from the comparison.

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Overview of the Economy and Labour Market in Burnley and Pendle

Key Points

Residents

- In 2018, the population of the Burnley and Pendle Travel to Work Area (TTWA) is nearly 180,000, making it the fourth largest of the six Lancashire TTWAs.
- The population has grown by 2% between 2008 and 2018, slightly slower than the Lancashire growth rate (3%) and considerably slower than national growth (+7%).
- The age profile is similar to Lancashire, but the number of people of working age has fallen by 4,500 between 2008 and 2018 – the highest percentage change in the Lancashire TTWAs (-4%). This is expected to continue, with 3,000 fewer residents of working age (-3%) expected to be resident in the area by 2028.
- 71.5% of working age people are in employment. Whilst this is below the national rate (75.4%), it has risen in line with the national growth rate over the past ten years. Since 2016/17, however, the TTWA rate has decreased by 5.4 percentage points. Local authority level data shows that Burnley reports a significantly higher employment rate than Pendle (77.7% compared to 65.3%).
- Overall, the working age population in the TTWA is less well-qualified than in Lancashire or nationally (2017/18), with one in five holding no qualifications.
- Reflecting the qualifications profile, the proportion of residents working in highly skilled occupations is below average and is the lowest out of the six TTWAs. This is also reflected in earnings levels which are below the Lancashire and national averages.
- Unemployment has fluctuated in recent years but has typically remained above the national rate, and is currently the highest out of the six TTWAs at 6.2% compared to a Lancashire average of 4.4%. At 7.1%, Pendle reports the highest local authority level unemployment rate in Lancashire.

- Unemployment is particularly high amongst women, 25-34 year olds, and the Pakistani / Bangladeshi population. Around 3,900 residents within the TTWA receive unemployment-related benefits.
- Economic inactivity rates have risen over the past year, and remain above the Lancashire and national average. A higher proportion of economically inactive people within the TTWA are looking after the family / home compared to the Lancashire level (27.9% compared to 22.7%), making it the most common reason for inactivity in the TTWA against it being the third most common reason recorded across Lancashire. An exceptionally high rate in Pendle (32.1%) contributes to this.
- There is a significant level of deprivation within the TTWA. Over a third (35%) of neighbourhoods (defined using Lower Super Output Areas or LSOAs¹) are amongst the 10% most deprived in England, making it the most deprived TTWA in Lancashire. Within the TTWA, Burnley is ranked the 8th most deprived local authority in England compared to Pendle which is 33rd.

Jobs and the Economy

- There are around 5,800 businesses / employers in the TTWA (2019), 88% of which are microbusinesses employing fewer than ten people.
- These employers provide 75,000 jobs (11% of the Lancashire total) in 2018, a figure which has increased by 4,000 jobs since 2015. This 6% increase is the highest level recorded by a TTWA with employment growing in both Burnley (3%) and Pendle (6%).
- The TTWA has a sector profile which differs to that of Lancashire. The largest sector in employment terms is advanced manufacturing, which employs 14,000 people, 19% of the total workforce (compared 12% at a Lancashire level), and accounts for 18% of the Advanced Manufacturing jobs across Lancashire.
- The second and third largest sectors are Retail (11,000 jobs) and Health and Social Care (10,000 jobs).
- Reflecting a trend across Lancashire, the fastest growing sector between 2015 and 2018 has been Logistics, which now employs 6,000 people within the TTWA.

¹ LSOAs are small geographies for data collection and reporting purposes that typically contain a population of approximately 1,500 people

Employment Forecasts

- Employment is forecast to grow between 2018 and 2028, with the creation of around 800 new jobs (+1%), although the rate of growth will be slower than across Lancashire.
- Recruitment is expected across all sectors and occupations, including in each of Lancashire's priority sectors, and sectors that have recently experienced employment decline such as Manufacturing. This will include recruitment for the relatively small number of new jobs created through sector growth, and jobs that become available as people leave or change jobs.
- Wholesale and Retail, Manufacturing, Human Health and Social Work, and Administrative and Support Services are forecast to create the most job opportunities each year between 2018-2028.
- In terms of occupations, recruitment is expected to be highest for Elementary, Caring, Leisure and Other Service Occupations, as well as Professional Occupations and Manager, Director and Senior Official roles, reflecting a move towards an 'hourglass' shaped labour market with opportunities at the top and bottom end but fewer mid-level roles.
- Demand for higher level skills is expected to increase, with an increase in the number of people in employment in the TTWA with qualifications at Level 3 or above (although the rate of change is expected to be lower than Lancashire wide), while the number in employment with qualifications at Level 2 or below or no qualifications will fall. The number of people in employment with other qualifications, such as apprenticeships, is also expected to increase.

Education and Skills

- Data for 2017/18 shows that at Key Stage (KS) 2, 56% of pupils meet the required standard, the lowest proportion of the Lancashire TTWAs.
- Data for 2017/18 shows overall GCSE performance (average Attainment 8 score of 41.9) is below the Lancashire (45.8) and England excluding London (43.7) averages. Young people in the TTWA also make less progress between KS2 (11) and KS4 (16) than the Lancashire and England excluding London averages.
- By the age of 19, the proportion of young people who have attained Level 2 and Level 3 qualifications remains lower than

the Lancashire and national averages (2017/18) with a ten percentage point gap evident between the TTWA and the Lancashire average making it the poorest performing TTWA.

- Considering provision delivered within the TTWA in 2018/19, there were 22,930 students participating in Further Education (FE) in Burnley and Pendle – the highest level in Lancashire's TTWAs. Some 99% of these students attended General FE Colleges.
- In 2018/19, a total of 1,550 Burnley and Pendle based residents started an apprenticeship, an increase of 8% from 2017/18 levels.
- The most common subjects for Burnley and Pendle based residents starting apprenticeships were Business, Administration and Law; Health, Public Services and Care; Engineering and Manufacturing Technologies; and Retail and Commercial Enterprise, which account for four-fifths of provision.

Key messages for partners across Burnley and Pendle

This Travel to Work Area (TTWA)-level report, together with the information contained within the data matrix, provides an understanding of the skills and labour market position in Burnley and Pendle, and how it compares to the picture across Lancashire, as well as the regional and national position.

The strength of the labour market and the supply of skills available to the economy are increasingly important in driving economic growth and delivering inclusive growth. Tackling the issues identified in this report will help to create the conditions in which the local economy can thrive.

This section of the report summarises the key messages from the data, to help guide partners in Burnley and Pendle.

Future Workforce Future Workforce: The Importance of the Young Future Workforce

Although employment in Burnley and Pendle is forecast to grow less quickly than in other parts of Lancashire, there is expected to be an absolute increase in the number of jobs within the TTWA over the next ten years, and local employers will need to fill many existing positions as current workers retire or move onto other roles.

It is therefore vital that the future workforce - the young people currently in education and training who will become part of the labour pool that local employers will draw from - have the skills and capabilities which prepare them for employment in the 21st century.

Given the pace of change within the labour market, with technological developments affecting not only the type of occupations in which people will work in future years but the nature of the work that they will do and how they will do it, forecasting future skills needs is very challenging. New occupations are likely to emerge, while the skills and qualifications needed to obtain and perform existing job roles may change significantly.

The future workforce will therefore need to be flexible and adaptable, and have the resilience to recognise and respond to the change that they are likely to see during their working careers. As well as having a firm foundation of the core skills needed for success in life - numeracy, literacy and digital skills, as well as work-related skills such as team-working, communication and problem-solving - young people need to be aware of the opportunities offered both within their local labour market and further afield, and an understanding of what is required from them if they are to make the most of those opportunities.

Better Informed Young People

In Burnley and Pendle, there is a need to continue to engage and inform young people about the world of work and the opportunities which are open to them, and use this as a mechanism to inspire young people to raise their aspirations. This is particularly important in the context of the TTWA reporting the lowest performance of the TTWAs at Key Stage 2 (with poor results across both local authorities) and evidence of a ten percentage point gap in attainment by the age of 19, relative to the Lancashire average. A wide range of options are open to young people within the TTWA, with FE and apprenticeship provision across a range of subject areas, and a significant higher education offer within the FE Colleges.

Engaging employers in education not only helps to educate young people about the world of work, it also offers the opportunity to help shape what young people learn and how they are taught, ensuring the curriculum aligns with local skills needs. As Technical Education is rolled out, including the new T-Levels (which two colleges in the TTWA will be offering by 2021) and

employers continue to influence the content of apprenticeships, the skills of the Future Workforce should continue to become better aligned with the needs of the local economy.

A Highly Skilled Manufacturing Workforce

The Burnley and Pendle TTWA is the fourth largest in employment terms, providing 11% of Lancashire's jobs. The Advanced Manufacturing sector is an important employer, split fairly evenly between Burnley (6,000 jobs) and Pendle (8,000 jobs). Advanced Manufacturing accounts for almost a fifth (19%) of all employment in the TTWA, compared to a Lancashire proportion of 12%. These are particularly important to the Lancashire economy, generally being highly productive and offering above average levels of pay. Ensuring that there is an appropriate pool of labour to take up these jobs, both as new jobs are created and as the existing workforce retires, will help the Lancashire economy to achieve its growth ambitions.

Whilst good quality jobs such as those in the Advanced Manufacturing sector are likely to attract recruits from across a wider geography, ensuring that local young people have the skills and aptitudes sought by local Advanced Manufacturing employers is important to ensure local people benefit from the strength of the manufacturing sector locally.

Connecting People to Local Employment Opportunities

Whilst growth is expected in the number of jobs in the TTWA requiring high level skills, the number of people employed within the TTWA with qualifications at Level 2 or below is expected to fall over the next ten years. However, despite the absolute decline in numbers, entry level jobs will continue to arise due to churn within the labour market, and employers will need to find new recruits to fill them. It is important that young people, particularly those that may not achieve Level 3 qualifications, are made aware of the opportunities that will be open to them, and provided with pathways once in work to continue to develop their skills and progress into higher levels of work-related learning.

Digital skills are increasingly required by employers across a wide range of occupations, and this is expected to continue as automation and digitalisation becomes more pervasive in all elements of the economy. Young people in the Burnley and Pendle TTWA need the opportunity to

acquire digital skills throughout their education, to give them a platform to develop the more advanced and specialist skills they may need once in work.

A More Skilled and Productive Workforce

Burnley and Pendle TTWA's workforce is crucial to its future economic success. The vast majority of jobs are filled by local people, 72% of residents in work are employed within the TTWA. Over the next ten years, there will be a need not only to find the workforce to take up the 800 or so additional jobs which are expected to be created by 2028, but also to replace those workers who are leaving the workforce due to retirement.

This additional and replacement demand will coincide with a continued contraction of the working age population, reducing the size of the labour pool from which employers are able to recruit. Whilst international migration has contributed to population growth in recent years (with Burnley and Pendle recording the second highest rate of the six TTWAs and almost double the Lancashire average), there is considerable uncertainty over future migration patterns once the UK implements a new immigration system post-Brexit. The Health and Social Care sector – the third largest employment sector in the TTWA – is expected to be particularly affected by changes to migration patterns.

In this context, it is important that the potential of the existing workforce is fully utilised, and those not currently in employment but who are interested in working, with the appropriate support, are encouraged and enabled to play an active part in the economy. As Pendle currently records the highest local authority level unemployment rate in Lancashire, this is a particular opportunity, subject to appropriate support being available to residents. It is, however, noted that the proportion of inactive residents who would like to work is significantly lower in the TTWA than the Lancashire average (8% against 18%).

New Skills and Changing Jobs

The changes seen within the labour market, with new roles emerging, and others changing radically as automation alters the way in which businesses operate, mean that re-skilling and upskilling are increasingly important, and will be required throughout everyone's working life. On average, the working age population in the TTWA is less well-qualified than in Lancashire, and many will need to refresh and develop their skills on an on-going basis.

Both employers and the individuals affected by change need to be provided with support to anticipate and respond to future change, providing opportunities to acquire the new skills that will keep businesses competitive and make individuals resilient to labour market change. Apprenticeships, both for new recruits and current workers at all ages and levels, are one part of achieving this, but there will also be a need for shorter, more intensive forms of training, which provide people with the core skills they need to move into new roles.

This type of training is particularly likely to be relevant to those needing digital skills either to retain their existing job, or move into a new one. Putting in place the training provision to deliver these skills will require providers to work with employers to identify the specific skills which are required in each role, and develop a training programme tailored to meet this specific need.

Inclusive Communities and an Inclusive Workforce

Over the past few years, the economy across Lancashire has strengthened and, like other places, the Burnley and Pendle TTWA has seen employment rise and unemployment fall. Economic inactivity has also been on a downwards trend, although there have been fluctuations year by year. Despite the fall in unemployment, the Burnley and Pendle rate remains above the Lancashire average, and there remain some 5,000 people who are unemployed within the TTWA. At 7.1%, Pendle has the highest unemployment rate in Lancashire and the local authority's resident employment rate stands at just 65.3% against the Lancashire average of 74.8%.

Some groups experience much higher rates of unemployment than others. The available data for the TTWA suggests that women, people aged 25-34 and the Ethnic Minority population, particularly those from Pakistani and Bangladeshi backgrounds are most likely to be affected. Intensive support is needed for those who remain unemployed, to connect them to the job opportunities which arise within the TTWA and ensure that they are equipped with the skills they will need to secure a job.

The Burnley and Pendle TTWA also continues to have a higher level of economic inactivity than Lancashire and the national position. Economic inactivity is higher than average particularly amongst women and those aged 50-64 years. At 30%, Pendle has a particularly high rate of inactivity, while in Burnley the inactivity rate is below average. In contrast to Lancashire, the most common reason for being economically inactive in the TTWA is looking after the family or home (accounting for almost a third of inactive residents in Pendle), with studying being the second most common reason. Falling economic inactivity rates over the past ten years have brought a significant number of people into the labour pool within Lancashire, helping to offset the decline in the working age population. Continuing this trend within the TTWA will require a range of policy responses to address the different barriers faced by those who are economically inactive but may wish to work.

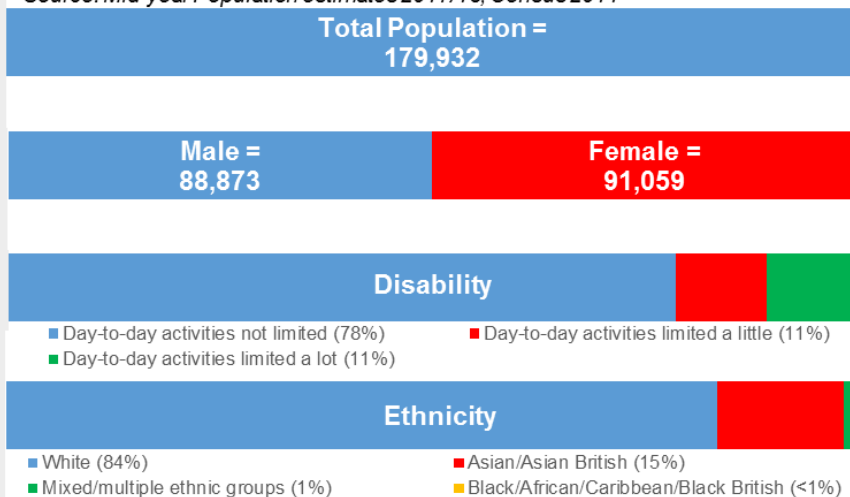
The latest update of the Index of Multiple Deprivation (IMD) highlights the extent of deprivation within the TTWA, with over a third of local areas classed as being amongst the 10% most deprived nationally and Burnley being the 8th most deprived local authority in England, with Pendle ranked 33rd. Tackling deprivation requires a holistic approach to its multiple domains, but improving skills and labour market outcomes has an important part to play, given the impact on employability and earnings, as well as the social and community benefits of education and skills.

There is a need to recognise the diversity of the Burnley and Pendle area, with skills levels, employment and unemployment rates varying considerably across the TTWA. Focussing support on those areas where labour market outcomes are poorest will support inclusive growth ambitions and help to narrow the gap between the TTWA's two local authorities, as well as the performance of the TTWA as a whole against Lancashire and national averages.

The Population in Burnley and Pendle – Who Lives in the Area?

Overview of the Burnley & Pendle Population

Source: Mid-year Population estimates 2017/18, Census 2011



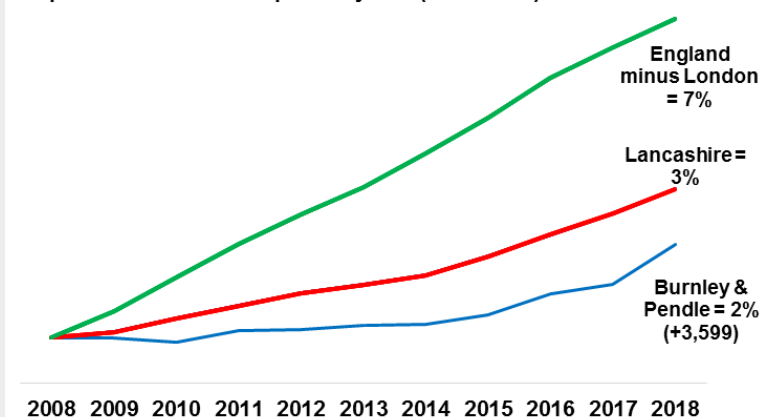
Population by Age Band, 2017/18

	Burnley and Pendle		Lancashire	England minus London
0-14	35,900	20%	18%	18%
15-19	9,700	5%	6%	6%
20-24	9,400	5%	6%	6%
25-34	23,800	13%	12%	13%
35-44	22,000	12%	12%	12%
45-54	23,600	13%	14%	14%
55-64	22,000	12%	12%	12%
65+	33,400	19%	20%	19%

Source: Mid-year Population Estimates

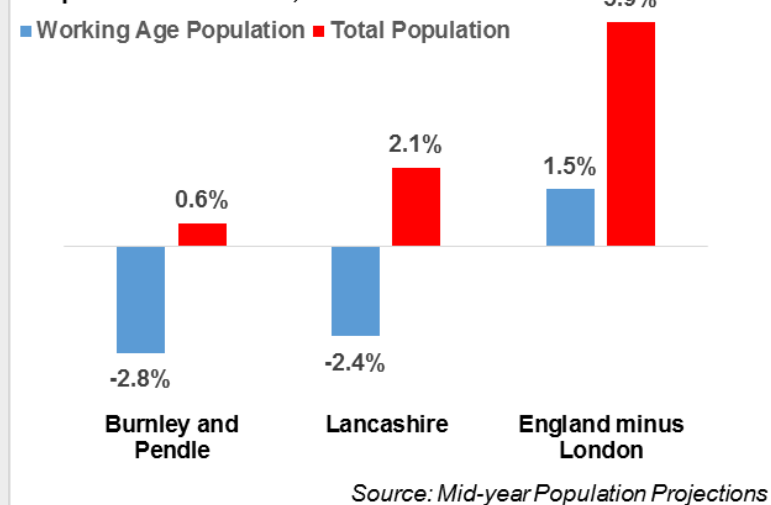
In 2018, 108,700 residents (60.4%) are of working age (aged 16-64). This is slightly lower than the share of the population that are working age in Lancashire (61.1%) and nationally (61.7%).

Population Growth: The past 10 years (2008-2018)



Source: Mid-Year Population Estimates 2017/18

Population Forecasts, 2018 to 2028



While the population is expected to grow by almost 1,100 residents between 2018 and 2028, the working population is expected to get smaller. By 2028, there will be almost 6,800 fewer residents of working age living in the area.

Total Population

In 2018, the Burnley and Pendle Travel to Work Area (TTWA) has a population of 179,932, 12% of the Lancashire total. It is the fourth largest of the six TTWA's in Lancashire.

Pendle and Burnley local authority areas are both of a similar size in terms of population. Pendle has 91,405 residents, while Burnley has 88,527 residents in 2018.

Ten per cent of the population of the TTWA live in a rural location, rising to 16% including hub towns. Just 5% of Burnley residents live in a rural area or hub town, compared to just over a quarter of Pendle residents.

The population of the Burnley and Pendle TTWA has grown by 2.0% over the past ten years (2008-2018), equating to an additional 3,599 residents. This is lower than the population growth seen in Lancashire (+3.2%), and well below the rate of growth seen nationally over the same period (+7.0%).

In 2018, long term international migration resulted in a net increase of 1,332 residents, or an increase in population of +0.75% - the second highest rate recorded at a TTWA level and above the Lancashire (+0.38%) and national (+0.30%) averages.

Gender, Age and Ethnic Make-Up of the Population

The population is split almost evenly between males and females, with a slightly higher proportion of females in the TTWA (50.6%) in 2018. This is consistent across the two local authority areas.

Just under 84% of the population in Burnley and Pendle is of white ethnicity, with Asian / Asian British people accounting for a further 15%. Pendle differs somewhat to Burnley, with 18.8% of its population from the Asian / Asian British ethnic group, compared to 11.0% in Burnley. This is the second highest Asian / Asian British population in Lancashire, after Blackburn with Darwen (28.1%).

The age profile of Burnley and Pendle's population is similar to that of Lancashire, across the North West and nationally in 2018. The 0-19 years age group accounts for 25% of the total population, compared to 24% in both Lancashire and nationally while 19% are aged over 65, compared to 20% in Lancashire and 19% nationally.

Working Age Population

There are 108,700 people of working age (16-64 year olds) in Burnley and Pendle, 60.4% of the total population in 2018. This is 11.9% of the total working age population in Lancashire, similar to the TTWA's share of the total population (12%). Both Burnley (60.5%) and Pendle (60.3%) have a marginally smaller proportion of residents of working age than in Lancashire, at 61.7%.

In contrast to the growth in the overall population, the working age population has fallen over the past ten years – by 4,500 people, or -4.0%. This is the largest change in population out of all the TTWA's and is a faster rate of decline than seen in the working age population in Lancashire, which has fallen by -1.4%, and is very different to the picture nationally, where the working age population has grown by 2.5%.

Population Projections

The population of Burnley and Pendle as a whole is expected to continue to grow slowly over the next ten years (2018-2028), with an additional 1,092 residents (+0.6%) forecast. This is, however, a slower rate of growth than is expected for Lancashire (+2.1%). Comparing the two areas, whilst a low level of growth is anticipated in Pendle (+1.1%), virtually no growth is expected in Burnley (+0.1%).

The working age population within both areas is expected to fall over the next ten years, with the decline forecast to be greater in Burnley (-3.3%) than in Pendle (-2.3%). Overall, the working age population of the TTWA is expected to fall by 3,047 people, or -2.8%, continuing the decline seen since 2008.

Labour Market Overview – Who is working in Burnley and Pendle?



Employment

Residents who have a job or are self-employed (Either within or outside the TTWA).

Unemployment

Residents without a job, who have been actively seeking work with the last four weeks.

Inactivity

Residents who are not in work and have not sought work in the last four weeks (e.g. looking after family/home, studying, long-term sick and retired).

<p>What is happening in the Burnley and Pendle TTWA?</p>	<p>76,300 people, 71.5% of the resident working-age population (16-64) are in employment (2018), an 2.6 percentage point increase from 2010.</p>	<p>5,000 people, 6.2% of economically active residents are unemployed (2017/18).</p>	<p>25,400 people, 23.8% of the working-age population are economically inactive (2017/18).</p>
<p>How does this compare to what is happening in Lancashire and nationally?</p>	<p>Lower than Lancashire (74.8%) and National rates (75.4%) (2017/18).</p>	<p>Higher than Lancashire (4.4%) and national rates (4.1%) (2017/18).</p>	<p>Higher than Lancashire (21.8%) and national rates (21.4%) (2017/18).</p>
<p>What is happening at the local level?</p>	<p>Burnley has the highest employment rate of the two local areas at 77.7% (2017/18). Pendle's is below the Lancashire and national average at 65.3% (2017/18).</p>	<p>The rate is lower in Burnley (5.4%) than in Pendle (7.1%) (2017/18).</p>	<p>Burnley has a lower rate at 17.9%. Pendle is much higher at 29.7% (2017/18).</p>

This means that across Burnley and Pendle:

- 5,000 residents are unemployed and looking for work.
- 25,400 residents are economically inactive – 1,900 of these residents (8%) would like to work (compared to 18% across Lancashire).

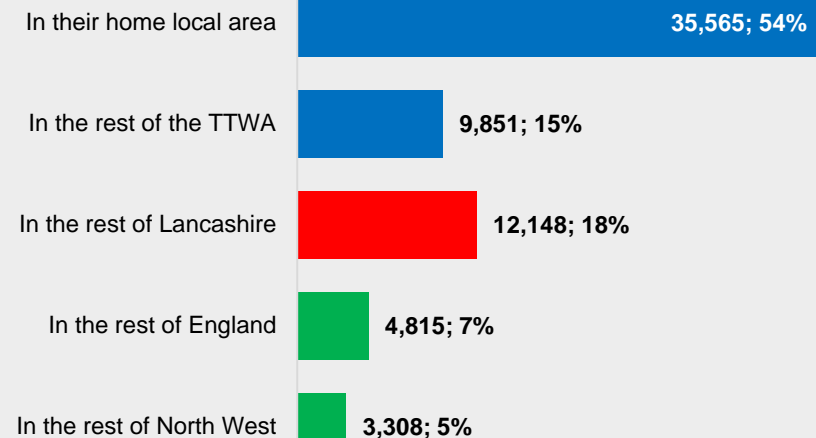
The primary reasons for being economically inactive (with percentages shown against the Lancashire average) are: looking after family/home (28% against 23%), studying (23% against 25%), being retired (21% against 17%), and being long-term sick (21% against 25%).

Local Residents in Employment – Who is working in Burnley and Pendle?

Employment Patterns, 2017/18				
Residents who work...	Burnley and Pendle		Lancashire	England minus London
	No.	%		
In self-employment.	8,000	10.5%	12.4%	13.7%
Full-time.	63,200	82.8%	74.7%	74.0%
Part-time.	13,200	17.2%	25.1%	25.8%
Under 10 hours weekly.	1,900	2.8%	3.0%	3.5%
10-34 hours weekly.	19,100	31.7%	28.6%	28.1%
35-44 hours weekly.	37,700	42.9%	46.6%	44.2%
45 hours or more weekly.	17,800	22.6%	21.8%	23.2%
In non-permanent employment.	3,100	3.9%	5.4%	4.7%

Source: Annual Population Survey July 2017 – June 2018

Where do residents in Burnley and Pendle work?



Source: Census, 2011

Median resident-based earnings (earnings of those who *live* in the area) in 2017 are £23,700 in Burnley and £25,300 in Pendle, compared to £25,800 in Lancashire and £29,100 nationally*.

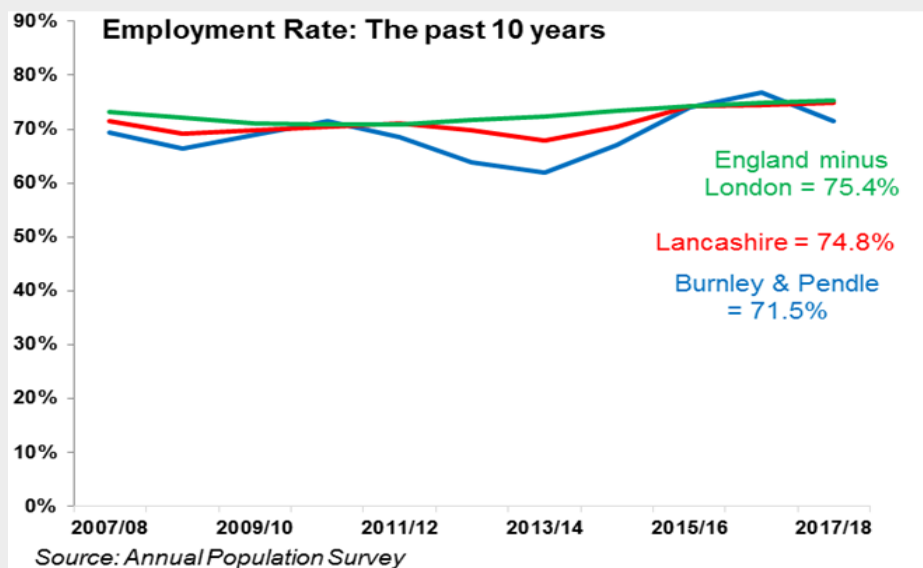
Median workplace-based earnings (earnings of those who *work* in the area) are slightly higher in Pendle (£25,300), but lower in Burnley (£22,500), in each case being below Lancashire and national averages.

The median house price in Burnley is £90,000 and in Pendle it is £105,000 in 2018. These are the lowest and third lowest prices in Lancashire.

The ratio of median house price to median gross annual residence-based earnings in both areas in 2018, is significantly lower than the Lancashire average (5.48), at 3.61 in Burnley and 3.78 in Pendle.



Local Residents in Employment – Who is working in Burnley and Pendle?



Employment Rate by Gender, 2017/18



	Burnley and Pendle	Lancashire	England minus London
Female	61%	71%	71%
Male	82%	79%	80%

Source: Annual Population Survey, July 2017 – June 2018

The employment rate grew by 2.2 percentage points over the last 10 years (2007/08 to 2017/18), a lower growth than across Lancashire (3.4 percentage points) but in line with the national rate of growth (2.1 percentage points). Employment rates for females are significantly lower in Burnley and Pendle than across Lancashire and nationally.

Employment Rate by Age Band, 2017/18

	Burnley and Pendle		Lancashire	England minus London
16-19	3,400	40%	36%	39%
20-24	5,500	60%	70%	68%
25-34	17,500	81%	87%	84%
35-49	30,100	84%	85%	85%
50-64	19,900	62%	69%	72%
65+	2,300	8%	9%	10%
16-64	76,300	72%	75%	75%

Source: Annual Population Survey, July 2017 – June 2018

Employment Rate by Ethnicity, 2017/18

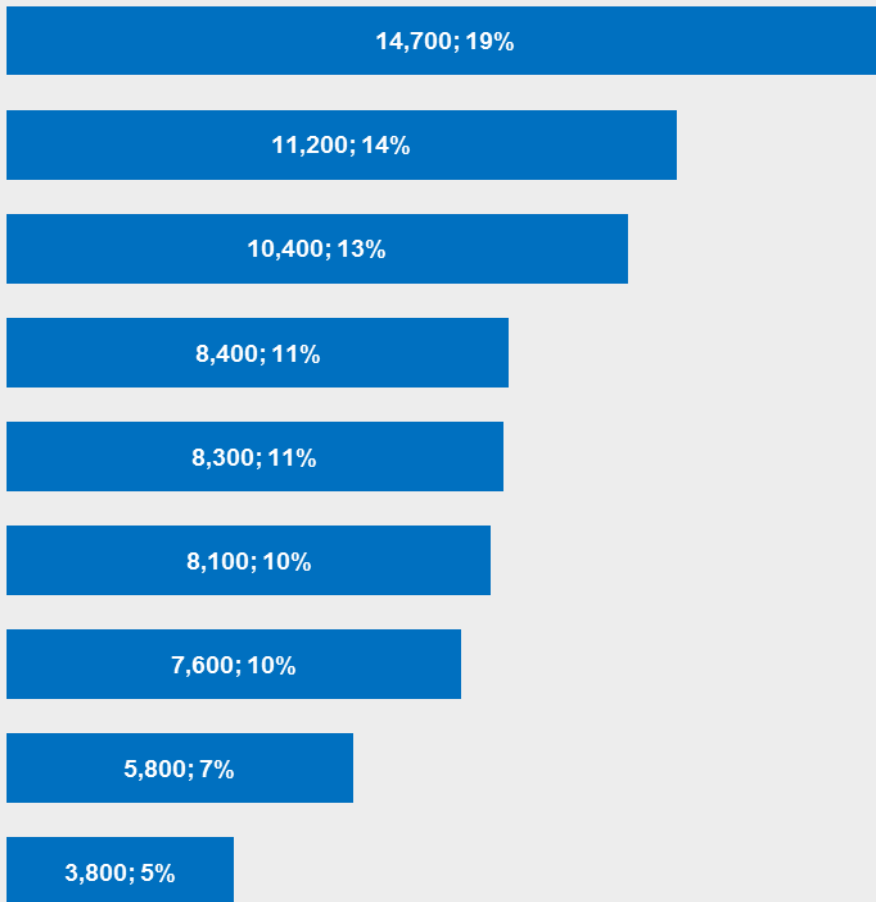
	Burnley and Pendle		Lancashire	England minus London
White	67,100	76%	77%	77%
Ethnic Minority	9,300	50%	57%	64%
Mixed Ethnic Group	..	..	52%	68%
Indians	..	..	64%	74%
Pakistanis/Bangladeshis	7,700	45%	49%	55%
Black or Black British	..	..	90%	74%
All Other Ethnic Groups	1,600	100%	60%	62%
16-64	76,300	72%	75%	75%

Source: Annual Population Survey, July 2017 – June 2018 .. Data unavailable

In 2017/18, the employment rate is highest amongst the 35-49 age group, in line with the picture across Lancashire and nationwide. The rate for 20-24 year olds (60%) is lower than in Lancashire and nationally, but the rate for 16-19 year olds is higher. The employment rate is higher amongst the White population (76%) compared to the rate for Ethnic Minority Groups (50%), with All Other Ethnic Groups recorded significantly high levels of employment.

Occupations of Local Residents – What jobs do people in Burnley and Pendle do?

Number and Proportion of Residents Employed by Occupation, 2017/18



Source: Annual Population Survey 2017/18

Professional Occupations, including teachers, lawyers, doctors, nurses and other medical occupations, engineers, scientists, social workers, architects and surveyors.

Caring, Leisure and Other Service Occupations, including teaching assistants, nursery workers, care workers, hairdressers, beauticians, caretakers and housekeepers.

Skilled Trades Occupations, including welders, mechanics, machinists, electricians, plumbers, plasterers, chefs, cooks.

Managers, Directors and Senior Officials, including all types of managers (finance, HR, sales, production etc.) in all types of organisations.

Sales and Customer Service Occupations, including sales assistants and shop workers, telesales and call centre workers and customer service managers.

Process, Plant and Machine Operatives, including factory workers, sewing machinists, tyre fitters, scaffolders, road and rail construction workers, lorry, bus and taxi drivers, train drivers and forklift truck drivers.

Elementary Occupations, including construction labourers, postal workers, cleaners, security staff, catering assistants and waiting / bar staff.

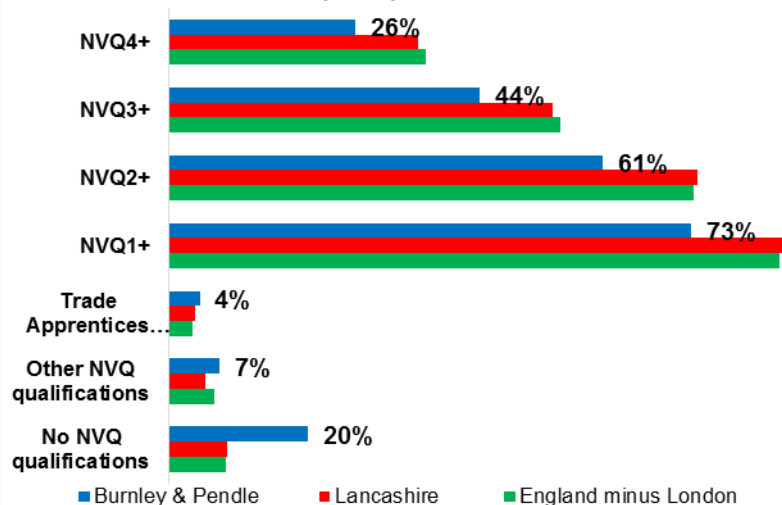
Associate Professional and Technical Occupations, including engineering, building and lab technicians, IT technicians, paramedics, police, prison and fire service officers, graphic designers, accounting technicians, health and safety officers.

Administrative and Secretarial Occupations, including admin officers, finance officers, office managers, secretaries, Personal Assistants (PAs) and receptionists.

Burnley and Pendle has a higher proportion of people working in Caring, Leisure and Other Service Occupations (14%) compared to nationally (9%) in 2017/18. In contrast, it has a lower share of residents in Administrative and Secretarial Occupations, and Associate, Professional and Technical Occupations. There has been considerable volatility in the data since last year, Skilled Trades Occupations have moved from the seventh most common occupation category to the third. Employment has also risen in Sales and Customer Service Occupations, moving it from the ninth most common category to the fifth. **Digital Occupations** are found across all sectors and some 1,400 people are employed in digital roles in Burnley and Pendle in 2017/18.

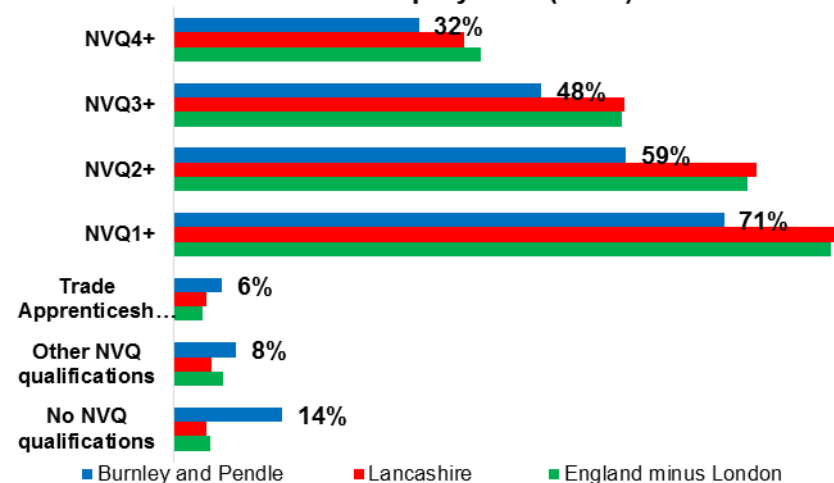
The Skills of Local Residents – How well-qualified are people in Burnley and Pendle?

Skills of local residents (2018)



Source: Annual Population Survey 2018

Skills of local residents in employment (2018)



Source: Annual Population Survey 2018

How do the skills of local residents differ by gender?

- In general, females are more highly qualified, as is the case across Lancashire and nationally.
- 29% of females hold qualifications at NVQ4 or above, greater than 23% for males.
- Similarly, 73% of females hold qualifications at NVQ1 or above; 64% for males.
- However, more females have no qualifications (19%) than is the case for males (8%).

...and by age?

- Burnley and Pendle residents are less qualified to NVQ4 or above at all age groups than across Lancashire as a whole.
- Those aged 30-39 are most likely to hold a qualification at NVQ4 or above, which is similar to the picture nationally.
- Of the data available, the 30-39 group also has the highest rate of qualifications at NVQ2+ (72%), while 37% of those aged 16-19 do not hold any formal qualifications.

In 2018, those in employment are more qualified, on average, than the working age population. A greater share of the resident population have no qualifications (20% v 14%), while a larger share of those in work have qualifications at NVQ4 and above (32% v 26%).

Residents in Employment in Burnley and Pendle

Around 76,300 (71.5%) of working age residents (aged 16-64) are in employment in 2017/18 within or outside the TTWA. Burnley and Pendle has the third lowest employment rate of the TTWA's across Lancashire and is lower than both the Lancashire (74.8%) and national (75.4%) average.

The employment rate has increased by 2.2 percentage points over the past ten years between 2007/08 and 2017/18, in line with national growth. However, since 2016/17 the rate has fallen by -5.4 percentage points, the largest decrease in the employment rate across all the Lancashire TTWA's.

At a local level, the employment rate differs between Burnley and Pendle. In Burnley the rate is above average at 77.7%, but in Pendle only 65.3% of working age residents are employed which is considerably below the Lancashire and national average. For Pendle to achieve the national employment rate, an additional 6,845 residents would need to gain employment (equivalent to a 20% increase).

Characteristics of those in Employment

In line with national trends, the employment rate for men (82%) is higher than the employment rate for women (61%) in 2017/18. The difference in the rates (of 21 percentage points) is much wider than the difference nationally.

At the local area level, the gender difference is even wider in Pendle, where the employment rate for males (77%) exceeds the rate for females (53%) by 24 percentage points.

The employment rate varies by age group and is highest amongst the 35-49 age group, in line with the picture across Lancashire and nationwide. The key differences in the employment profile by age relate to the younger age groups. The rate for 20-24 year olds (60%) is lower than in Lancashire and nationally, but the rate for 16-19 year olds is higher (40%).

The employment rate also varies by ethnicity. It is higher amongst the white population (76%) and Other Ethnic Groups (100%), exceeding the employment rate for these groups in Lancashire and nationally. As is the case across Lancashire, there are particularly low employment rates

amongst the Pakistani and Bangladeshi groups in Burnley and Pendle (45%), below Lancashire and national averages.

Employment Hours

Data from 2017/18 shows that one in ten working age residents (10.5%) in Burnley and Pendle are self-employed. This is one of the lowest rates across the TTWA's, only higher than Preston, Chorley and South Ribble, and is also lower than the Lancashire (12.4%) and national (13.7%) average. The low rate across the TTWA reflects particularly low levels of self-employment in Burnley (8.4%), while Pendle (13.1%) is between the Lancashire and national average.

More than four out of five working age Burnley and Pendle residents in employment are employed on a full time basis – the highest proportion out of all the Lancashire TTWA's and significantly higher than the national average (74%) – and almost two thirds of residents work over 35 hours per week.

There are also residents who work on a non-permanent basis, including fixed period contracts, agency temping casual work, casual work and seasonal work. This applies to 3.9% of working age residents in Burnley and Pendle, compared to 5.4% across Lancashire and 4.7% nationally.

Occupations

The largest occupational group amongst residents in Burnley and Pendle is **Professional Occupations**, accounting for almost a fifth of those in employment in 2017/18. This is followed by **Caring Leisure and Other Service Occupations**, and **Skilled Trades Occupations**.

Burnley and Pendle has a higher proportion of people working in Caring, Leisure and Other Service Occupations (14%) compared to nationally (9%). In contrast, the area has a lower share of residents in Administrative and Secretarial Occupations, and Associate, Professional and Tech Occupations.

Analysis and Insight: Residents in Employment in Burnley and Pendle

There has been considerable volatility in the data since last year. Skilled Trades Occupations have moved from the seventh most common occupation category to the third. Employment has also risen in Sales and Customer Service Occupations, moving it from the ninth most common category to the fifth.

Key points to note at the local level include:

Highly Skilled Occupations: Overall, 37% of residents from the TTWA are employed in highly skilled occupations (Managers, Directors and Senior Officials; Professional Occupations; and Associate Professional and Technical Occupations). This is the lowest proportion out of all the Lancashire TTWA's and is therefore below the Lancashire average (40%), as well as the national average (44%).

Whilst the proportion of residents working in highly skilled occupations is similar between Burnley and Pendle, Burnley has a much higher than average share in Professional Occupations (24%) compared to Pendle (12%).

Amongst Pendle's residents, there is a larger proportion of managers, directors and senior officials and associate professional & tech occupations, while in Burnley the associate professional and technical group is particularly underrepresented, at just 4% of all occupations.

Across the remaining occupational groups: Both Burnley and Pendle have particularly low proportions of residents (5%) working in **Administrative and Secretarial Occupations**, which is below both the Lancashire (12%) and national (10%) averages. In contrast, both Burnley and Pendle have a higher than average proportion of residents working in **Caring, Leisure and Service Occupations**.

Whilst Burnley's proportion of residents working in **Skilled Trade Occupations** is in line with the Lancashire average (10%), Pendle's is above average (17%). Burnley instead has a higher proportion of residents working in **Sales and Customer Services** (13%), compared to 7% in Pendle which is in line with the national average.

Travel to Work

Based on the 2011 Census, over half (54%) of Burnley and Pendle residents in employment work in their home local area, while 15% work within the wider TTWA meaning a total of 69% of residents live and work within the Burnley and Pendle TTWA. The large majority of residents who work outside the area, travel to other parts of Lancashire (18%) or to other parts of England outside of the wider North West region (7%), reflecting links to Yorkshire.

Earnings*

The median earnings of residents in the TTWA are below the national average, at £23,700 in Burnley and £25,300 in Pendle. This is equivalent to between 81% and 86% of the national average (£29,100) in 2018. The median earnings of Burnley and Pendle residents are also below the average for Lancashire (£25,800).

When the median earnings of residents from each local area (i.e. resident-based earning) are compared to the median earnings of the jobs based in each area (i.e. workplace-based earnings), the data suggests that:

- Residents from Burnley typically travel to access higher paid employment, with workplace-based earnings (£22,500) lower than resident based earnings.
- Residents in Pendle are typically employed in higher paid jobs, with little difference between resident-based and workplace-based earnings (£25,400) in the area.

Median workplace-based earnings for the TTWA are equivalent to between 88% and 99% of the national average.

Whilst local data is not available, in the North West as a whole 1.7% of those in employment earn below the minimum wage.

Housing Affordability

The median house price in Burnley is £90,000 and in Pendle it is £105,000 in 2018. These figures are the lowest and third lowest figures recorded in Lancashire.

Between 2017 and 2018, the ratio of median house price to median gross annual residence-based earnings in both areas is significantly lower than the Lancashire average (5.48). At 3.61 in Burnley and 3.78 in Pendle, the TTWA records the lowest local authority ratios in Lancashire.

The Skills Profile

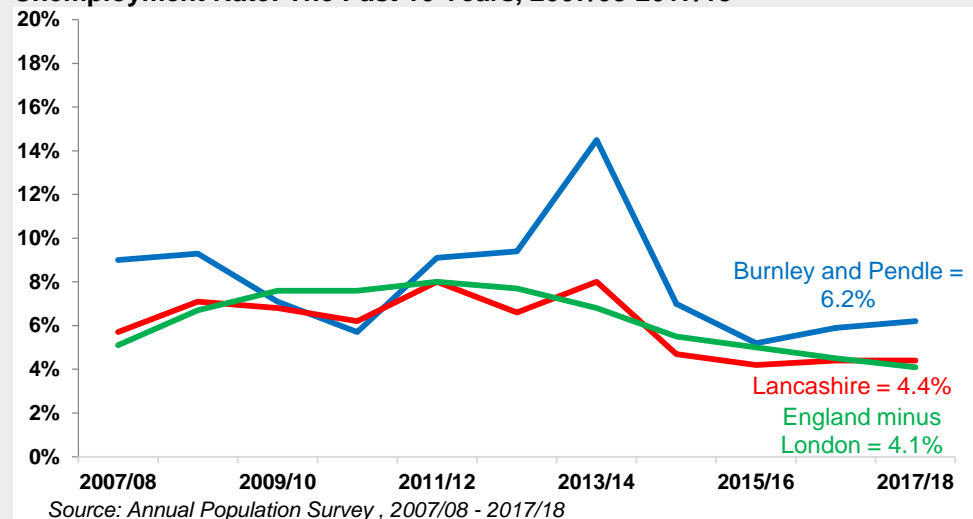
Overall, the working age population in Burnley and Pendle is less qualified than the working age population across Lancashire and nationally in 2018. At all skills levels the area underperforms against the Lancashire and national average. Moreover, one in five working age residents hold no qualifications (the highest level across the TTWAs) compared to a Lancashire average of 8.8%.

Local authority data shows that Pendle and Burnley are the two authorities with the highest proportion of residents holding no qualifications in Lancashire, with a high of 20.4% recorded in Pendle. Both Burnley and Pendle have 26% of residents with qualifications at NVQ Level 4 or above, Pendle has a slightly higher proportion but they are consistently below the Lancashire and national average.



Residents who are in employment are, on average, more qualified than the working age population as a whole. For example, 32% of Burnley and Pendle residents who are in employment hold qualifications at Level 4 or above compared to 26% of the working age population. Conversely, a smaller proportion of those in work have no qualifications (14%), compared to the resident population as a whole (20%).

Unemployment – Who is unemployed in Burnley and Pendle?

Unemployment Rate: The Past 10 Years, 2007/08-2017/18



Unemployment Rate by Gender, 2017/18

	Burnley and Pendle	Lancashire	England minus London
	9%	4%	4%
	4%	5%	4%

Source: Annual Population Survey 2017/18

Over the past decade (2007/08 to 2017/18) the unemployment rate fell by 2.8 percentage points, a greater fall than across Lancashire (-1.3 percentage points) and nationally (-1 percentage points) in 2017/18. However, unemployment remains above the Lancashire and national average and is the highest of the TTWA's. The unemployment rate for females in Burnley and Pendle is more than twice the Lancashire and national average, while the rate for men is slightly below the average across Lancashire and in line with the national level.

Unemployment Rate by Age Band, 2017/18

	Burnley and Pendle		Lancashire	England minus London
16-19	..	..	20%	17%
20-24	..	..	10%	9%
25-34	1,400	7%	4%	4%
35-49	..	..	2%	3%
50-64	1,100	5%	2%	3%
16-64	5,000	6.2%	4%	4%

Source: Annual Population Survey 2017/18 .. Data unavailable

There are 2,920 young people who are Not in Education, Employment or Training (NEET) in Lancashire equating to 9.0% of 16-17 year olds, compared to 5.7% nationally. (Department for Education NEET and participation figures, 2018/19).

Unemployment Rate by Ethnicity, 2017/18

	Burnley and Pendle		Lancashire	England minus London
White	3,600	5%	4%	4%
Ethnic Minority	1,400	13%	10%	7%
Mixed Ethnic Group	..	..	..	6%
Indians	..	..	4%	5%
Pakistanis/Bangladeshis	1,400	16%	17%	10%
Black or Black British	..	..	..	8%
All Other Ethnic Groups	..	..	4%	6%
16-64	5,000	6.2%	4%	4%

Source: Annual Population Survey 2017/18 .. Data unavailable

Where data allows comparison, the 25-34 age group (7%) has an unemployment rate above the Lancashire and national rate (both 4%) in 2017/18. Data is not available for the 16-19 and 20-24 age groups. Pakistani/Bangladeshi groups (16%) have the highest unemployment rate, marginally below the Lancashire average (17%) but above the national rate for this population (10%). Unemployment is also high for ethnic minorities (13%) and is above both the Lancashire (10%) and national rate (7%).

Unemployment – The Difference between Unemployment and the Claimant Count in Burnley and Pendle

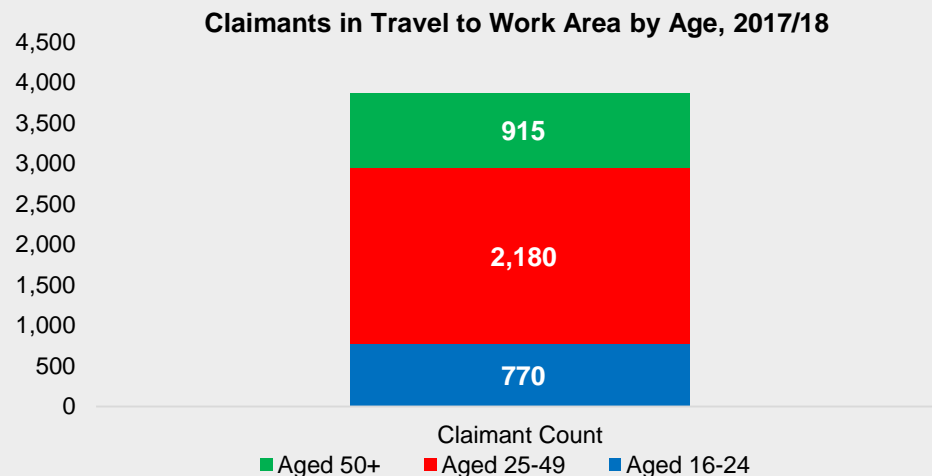
'Unemployment' refers to people who are actively seeking and available for work. There are two core measures:

International Labour Organisation (ILO) unemployment – which is measured using an internationally agreed definition and is typically higher than the number of people claiming benefits.

The Claimant Count measures the number of people who are receiving benefits principally because they are unemployed, and includes both those who remain on Jobseeker's Allowance (JSA) and those who are claiming the unemployment-related elements of Universal Credit. Not everyone who is unemployed is eligible to claim unemployment-related benefits.

This page compares the number of unemployed in people in Burnley and Pendle, with the number who are claiming unemployment-related benefits.

The Claimant Count has risen over the past year, by 230 people, and the proportion of claimants is currently above both the Lancashire and national rate.



Source: Claimant Count, November 2018

- ILO Unemployment figures for Burnley and Pendle are not available by age band.

In 2017/18, the age profile of claimants in Burnley and Pendle is broadly in line with that across Lancashire and nationally. While there is higher unemployment amongst females, unemployed males are much more likely to receive benefits when compared to unemployed females. ILO unemployment in the TTWA stands at 6.2% across all age groups.

Unemployment and Claimant Count by Gender, 2017/18

Burnley and Pendle	Unemployment	Claimant Count
	3,400	1,680
	1,700	2,185

Source: Annual Population Survey 2017/18; Claimant Count, November 2018

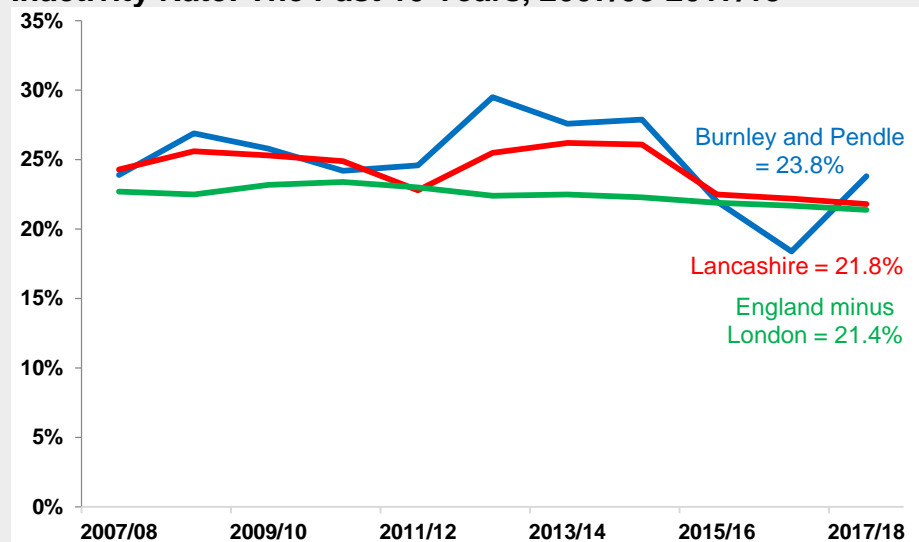
Claimant Count Unemployment, 2018

Residents	Burnley and Pendle	Lancashire	England minus London
Claimant Count (no.)	3,865	24,855	641,455
Claimant Count (% of working age population)	3.6%	2.7%	2.2%
Claimants as % of those Unemployed.	77%	81%	69%

Source: Annual Population Survey, 2017/18; Claimant Count, November 2018

Economic Inactivity – Who is economically inactive in Burnley and Pendle?

Inactivity Rate: The Past 10 Years, 2007/08-2017/18



Source: Annual Population Survey, 2007/08 - 2017/18

Top 3 Reasons for Inactivity, 2017/18



1. Looking after family and home (28%)



2. Studying (23%)



3. Retirement (21%)

In 2017/18, Burnley and Pendle has a higher share of inactive residents looking after family and home, than the Lancashire (23%) and national averages (24%). While there is a lower share of those studying, the second most common reason, than in Lancashire (25%) and nationally (26%). Retirement is the next most common reason, above the Lancashire (17%) and national (14%) proportion.

Inactivity Rate by Age Band, 2017/18

	Burnley and Pendle		Lancashire	England minus London
16-19	3,900	47%	55%	54%
20-24	2,400	27%	23%	26%
25-34	2,700	13%	10%	13%
35-49	5,500	15%	13%	13%
50-64	10,800	34%	30%	26%
65+	26,000	92%	91%	90%
16-64	25,400	24%	22%	21%

Source: Annual Population Survey 2017/18

Inactivity rates are highest in the 16-19 age group at 47% although this is still below the Lancashire and national average in 2017/18. Rates are particularly high in the Pakistani/Bangladeshi (46%) and ethnic minority (43%) groups, broadly similar to the picture across Lancashire.

Inactivity Rate by Ethnicity, 2017/18

	Burnley and Pendle		Lancashire	England minus London
White	17,500	20%	20%	20%
Ethnic Minority	7,900	43%	37%	31%
Mixed Ethnic Group	n/a	n/a	37%	28%
Indians	n/a	n/a	33%	22%
Pakistanis/Bangladeshis	7,900	46%	41%	39%
Black or Black British	n/a	n/a	10%	27%
All Other Ethnic Groups	n/a	n/a	38%	34%
16-64	25,400	24%	22%	21%

Inactivity Rate by Gender, 2017/18

	Burnley and Pendle		Lancashire	England minus London
Female	17,300	33%	26%	26%
Male	8,000	15%	17%	17%

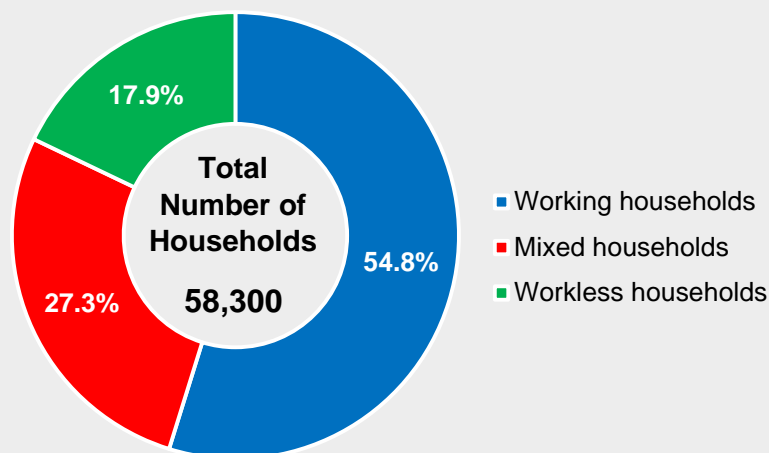
Source: Annual Population Survey 2017/18

Deprivation and Household Economic Inactivity – How many workless households are there in Burnley and Pendle?

Composition of Households, 2017/18

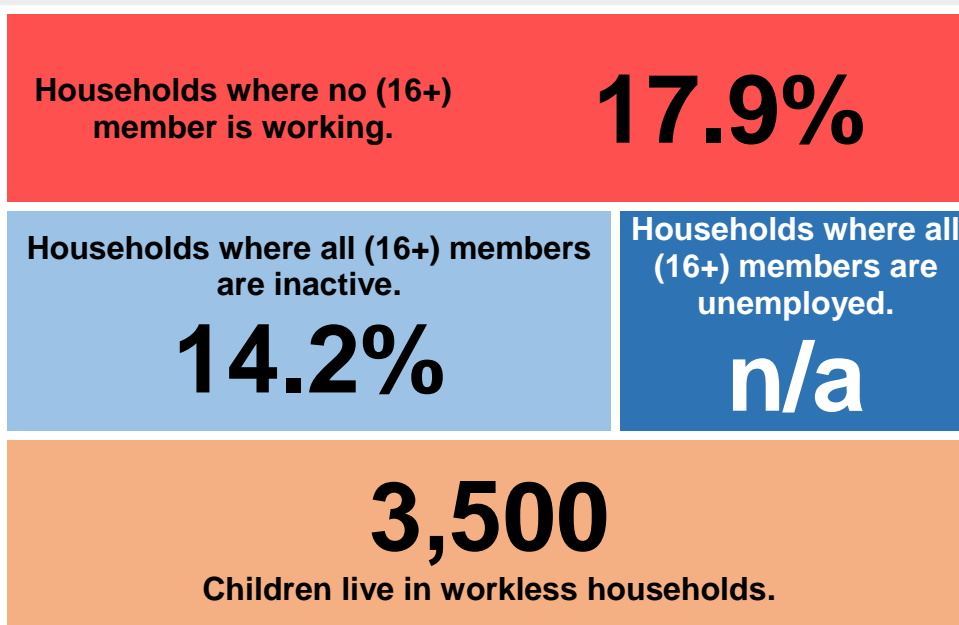
In 2017/18, Burnley and Pendle has a lower share of working households than across Lancashire and nationally (both 59%). As a result, the Travel to Work Area (TTWA) also has a higher proportion of workless households than in Lancashire (15%) and nationally (14%) in 2018. This includes student households. Mixed households – which contain both working and workless members – are roughly as common as in Burnley and Pendle as across Lancashire (26%) and nationally (27%).

The Composition of Households in the TTWA, 2017/18



Source: Annual Population Survey Household Dataset, July 2017 - June 2018

Overview of Workless Households, 2018



Source: Annual Population Survey household dataset, July 2017 – June 2018

Index of Multiple Deprivation (IMD) by Lower Super Output Area (LSOA*), 2019		
	Burnley and Pendle	Lancashire
No. LSOA's in 10% most deprived	41	186
% of LSOA's in 10% most deprived	35%	20%

Source: Index of Multiple Deprivation, 2019
 * lower super output areas are small geographies for data collection and reporting purposes that typically contain a population of approximately 1,500 people.

Across Burnley and Pendle, 35% of LSOAs are in the most deprived 10% in the country in 2019. This is a much higher proportion than the Lancashire average where 20% of LSOA's are in the most deprived 10%.

Deprivation varies within the TTWA. Burnley ranks particularly poorly and is the 8th most deprived local authority in the country, while Pendle ranks 33rd.

Unemployment in Burnley and Pendle

Based on the International Labour Organisation (ILO) definition of unemployment*, 5,000 people are unemployed in Burnley and Pendle in 2017/18. This equates to 6.2% of economically active residents, up from 5.9% in the previous year, above the Lancashire (4.4%) and national (4.1%) average. Unemployment has fluctuated significantly over the past 10 years but has typically remained above the national rate. The unemployment rate has fallen by 2.8 percentage points over the last 10 years between 2007/08 and 2017/18, exceeding reductions recorded across Lancashire (-1.3 percentage points) and nationally (-1 percentage points). Despite this fall, unemployment remains above the Lancashire and national average and is highest of any of the TTWA's.

Within the TTWA, Pendle has the highest unemployment rate (7.1%) whilst in Burnley it is lower (5.4%), but still exceeds the Lancashire and national averages.

Characteristics of those who are unemployed

Unemployment amongst women in Burnley and Pendle (9.4%) is significantly above the Lancashire (3.7%) and national average (4.1%) in 2017/18. In contrast, unemployment amongst men (3.7%) is below the Lancashire (5.0%) and national (4.1%) average.

Where data is available by age unemployment is higher than average in the 25-34 age group (7%), above the Lancashire and national rate (both 4%). While in Lancashire, 16-19 year olds are the most likely to be unemployed (20%), above the national average (17%) although data is unavailable for the TTWA (due to the small size of the survey sample).

By ethnicity, unemployment is lowest within the white population (5%), slightly above the Lancashire and national average (both 4%). Pakistani/Bangladeshi groups have the highest unemployment rate (16%), marginally below the Lancashire average (17%) but above the national rate (10%) for this population. Unemployment is also relatively high for ethnic minorities (13%), above both the Lancashire wide (10%) and national rate (7%).

The Claimant Count

The Claimant Count measures the number of people who are receiving benefits principally because they are unemployed, and includes both those who remain on Jobseeker's Allowance (JSA) and those who are claiming the unemployment-related elements of Universal Credit. There are 3,865 claimants in Burnley and Pendle in 2018. This is equivalent to 3.6% of the working age population, up from 3% in the previous year, and above the Lancashire (2.7%) and national (2.2%) average. Contrary to the unemployment rate Burnley has the highest share of claimants in the TTWA (5.0%), while in Pendle (2.1%) the proportion of claimants is below both the Lancashire and national averages.

In Burnley and Pendle a lower share of those who are unemployed receive and/or claim benefits (77%) compared to the Lancashire (81%) level, although the rate is above the national level (69%) in 2017/18. The age profile of claimants in Burnley and Pendle is broadly in line with that across Lancashire and nationally. While there is higher unemployment amongst females, unemployed males are much more likely receive benefits when compared to unemployed females.

Economic Inactivity in Burnley and Pendle

Across Burnley and Pendle in 2017/18 there are 25,400 economically inactive residents, which includes those who are not in work and have not sought work in the last four weeks. This makes up 23.8% of the working age population, above both the Lancashire wide (21.8%) and national (21.4%) rate. Inactivity has risen from 18.4% in the previous year, but is consistent with the economic inactivity rate 10 years ago falling by just 0.1 percentage point, compared to a decline of 2.5 percentage points across Lancashire as a whole and 1.3 percentage points nationally.

The above average rate in the TTWA reflects particularly high levels of inactivity in Pendle (29.7%), while in Burnley (17.9%) inactivity is below the Lancashire and national average.

Reasons for economic inactivity

Looking after family/home was the most common reason for being inactive in Burnley and Pendle (28%), above the proportion across Lancashire (23%) and nationally (24%) in 2017/18. The second most common reason for being inactive is due to studying (23%), accounting for a slightly lower share of those inactive than across Lancashire (25%) and nationally (26%). Being inactive due to retirement is the third most common reason in Burnley and Pendle (21%) accounting for a higher share compared to Lancashire (17%) and nationally (14%). Being long-term sick follows (21%), although the proportion is below the Lancashire (25%) and national (23%) share.

Characteristics of those who are inactive

A high proportion of working age females (33%) are inactive compared to males (15%) in 2017/18. This is consistent with the national picture although the gender gap is larger than at the Lancashire and national level (both 26% amongst women and 17% for men).

As is the case nationally, aside from those of retirement age, inactivity is highest amongst young people aged 16-19 (47%), although the rate is below the Lancashire (55%) and national (54%) rate for this age group. Inactivity also differs from the Lancashire and national picture in the 50-64 age group, which stands at 34% in the TTWA compared to 30% across Lancashire and 26% nationally.

Large disparities also exist by ethnicity. As is the case nationally, Pakistani and Bangladeshi groups have higher than average rates of inactivity in Burnley and Pendle (46%), above the Lancashire (41%) and national (39%) rate. Inactivity is lowest in the white population (20%) equal to the share across Lancashire and nationally (both 20%).

Economic Activity by Household

Out of the 58,300 households in Burnley and Pendle, the majority (55%) are working, as is the case across Lancashire and nationally (both 59%) although the share of working households is slightly lower in the TTWA. While the share of workless households (18%) is higher than across

Lancashire (15%) and nationally (14%). The share of mixed households (27%) containing both working and workless members is broadly in line with the Lancashire (26%) and national level (27%).

As with the disparities for employment, unemployment and inactivity, there are variances in the household profile at the local level. Working households are more prevalent in Burnley (58%) compared to Pendle (52%) although in both TTWAs the share of working households is below the Lancashire and national average. In Pendle mixed households are far more prevalent (32%) compared to Burnley (23%) while in Burnley a slightly higher share of households are workless (19%) compared to Pendle (17%) with the share of workless households in both TTWAs above the Lancashire and national average.

Of 10,400 workless households in 2017/18, a large majority are occupied by residents who are economically inactive. In 14.2% of households all members over 16 are inactive. There are 3,500 children living in households where no-one is in work, a number which has fallen significantly since 2013 by around 60% - equating to 5,700 children.

Deprivation

The Index of Multiple Deprivation (IMD), the most commonly used measure of deprivation, covers a range of factors which influence an individuals' living conditions including: income; employment; health deprivation and disability; education skills and training; barriers to housing and services; living environment; and crime.

IMD Data for 2019 shows that around 35% of LSOAs (see page 19 for a definition) in Burnley and Pendle are in the most deprived 10% in the country, making it the most deprived TTWA in Lancashire, a proportion which has risen from 31% in 2015, remaining above the 20% across Lancashire and 22% in the North West.

Deprivation varies within the TTWA. Burnley, which was previously the 9th most deprived local authority in the country, is now the 8th while Pendle is the 33rd up from the 38th in 2015.

Employment by Sector in Burnley and Pendle – What sectors do people work in?

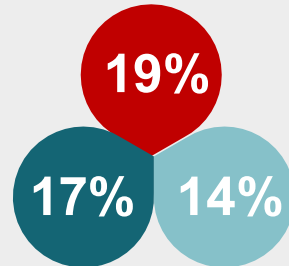
Total Employment, 2018



75,000 JOBS

11% of all jobs in Lancashire

Three Largest Employment Sectors, 2018



Advanced Manufacturing
Retail including Motor Trades
 Health and Social Care

Jobs in the Largest Sectors*, 2018



14,000 JOBS

1. Advanced Manufacturing



11,000 JOBS

2. Retail (including Motor Trades)



10,000 JOBS

3. Health and Social Care



9,000 JOBS

4. Finance and Professional Services



7,000 JOBS

5. Education



6,000 JOBS

6. Logistics



5,000 JOBS

7. Administration and Support



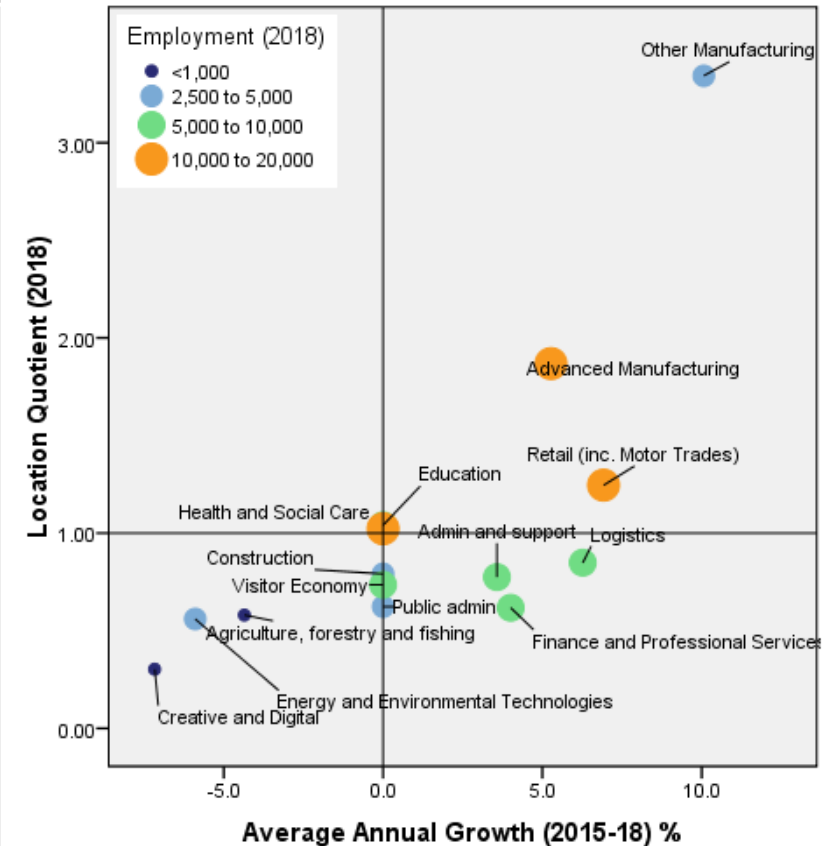
5,000 JOBS

8. Visitor Economy

Employment Growth and Specialisation, 2015-18

Top left: Sectors that have seen employment fall since 2015, and are more highly represented in the local area than the national average.

Top right: Sectors that have seen employment growth since 2015 and are more highly represented in the local area than the national average.



Bottom left: Sectors that have seen employment fall since 2015 and are less highly concentrated in the local area than the national average.

Bottom right: Sectors that have seen employment growth since 2015 and are less highly concentrated in the local area than the national average.

Sources: Business Register and Employment Survey, 2015-2018

* Sector definitions used are Lancashire's priority sectors, plus the rest of the economy.

The Business Base in Burnley and Pendle – What Businesses are in the area?

There are 5,775 different businesses in Burnley and Pendle in 2019:



Private Employers



The Public Sector



Charities and Voluntary Organisations

Businesses by Employment Size Band, 2019

88% are micro businesses employing fewer than 10 people.

10% are small businesses, employing between 10 and 49 people.

2% are medium-sized businesses, employing between 50 and 249 people.

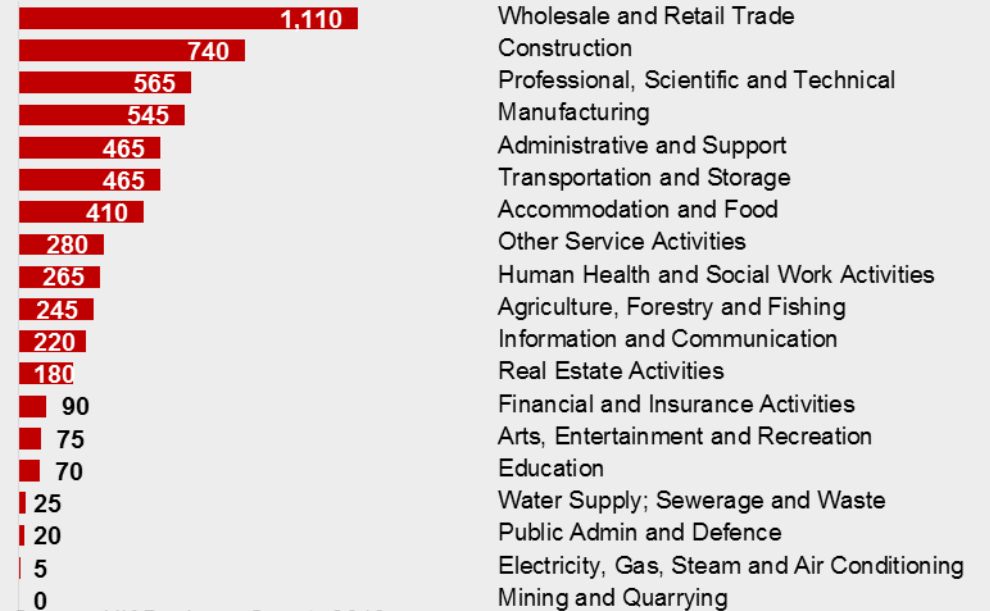
<1% are large businesses employing 250 or more people.



Source: UK Business Counts 2019

In 2019, the split of businesses by size is in line with the Lancashire average. Micro businesses account for a slightly smaller proportion of the business base than nationally (89%). Fewer than 1% of employers, around 25, in Burnley and Pendle are classed as large employers, employing 250 people or more.

Burnley and Pendle Business Counts by Sector 2019



Source: UK Business Counts 2019

In 2017, business deaths outnumbered business births by 40, resulting in a net rate of business creation of -1%, which is in line with the Lancashire average.

Location of Employment and Key Employers – Where do people work in Burnley and Pendle?

This map shows where employment is concentrated across Burnley and Pendle. Darker regions correspond to higher numbers of jobs. There are 5,755 micro, small, medium and large employers based in the area.

This map highlights some of the area's key employers and the sectors they are in.

Sector

AM – Advanced Manufacturing
AS – Admin and Support Services
CD – Creative and Digital
Co – Construction
Ed - Education
EE – Energy and Environmental Technologies
FPS – Finance and Professional Services
H - Housing
HSC – Health and Social Care
L – Logistics
OM – Other Manufacturing
R – Retail

Nelson

ACDC Lighting (AM)
Cherry Tree Recruitment (AS)
Utility Renewals (AS)
REM (UK) (OM)
Buoyant Upholstery (OM)
Mackintosh (OM)
Furnico (OM)
Dale Techniche Ltd (AM)
In-Situ (CD)

Orient and Network 65 Business Parks

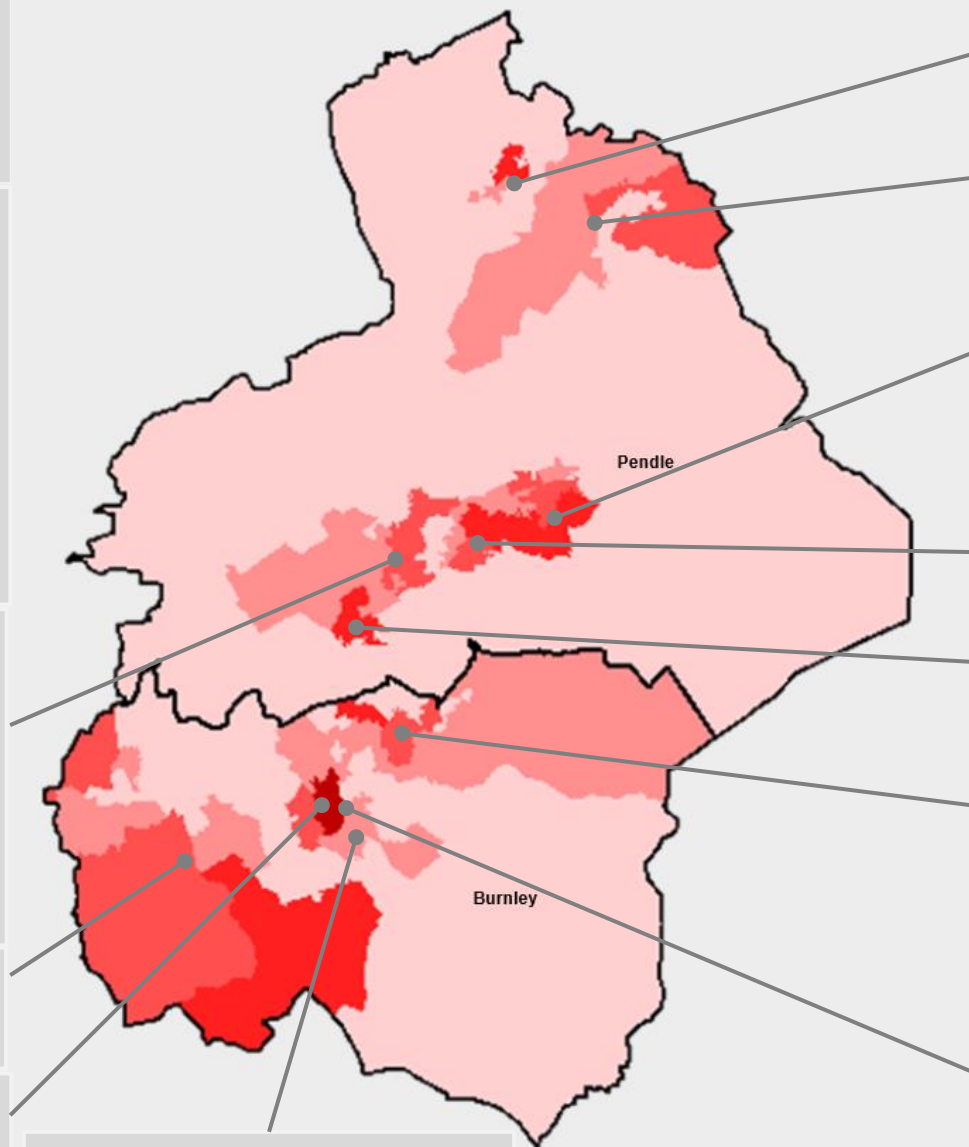
Panaz (AM)
Paradigm Precision Engineering (AM)

West Burnley

Best Heating (Co)
Exertis (L)
Fort Vale Engineering (AM)

South Burnley

BAAS Construction (Co)



Barnoldswick

Rolls Royce (AM)
Silentnight (OM)
English/Irish Country Cottages (VE)
Leggett & Platt Springs (AM)

West Craven Business Park

Senior Aerospace Weston (AM)
Wardle Storeys (AS)
Uniroyal Global (AM)

Colne

Libra Textiles Ltd (R)
Askews Ltd (EE)
Simpsons of Greenfield Mill (AM)

Whitewalls Industrial Estate

Woodhead Brothers Meat Company (AM)
Matthew Kibble Transport (L)
Jewson (R)

Lomeshaye Industrial Estate, Nelson

Daisy Communications (CD)
Barnfield Construction (Co)

North Burnley

Burnley General Hospital (HSC)
Safran Aircelle (AM)
BCW Manufacturing Group (AM)
TRW Automotive (AM)

Burnley Town Centre

Viking Place Sheltered Housing (AS)
Burnley College (Ed)
Door4 (CD)
Marsden Building Society (FPS)
Calico Group (H)
24+ Marketing (FPS)
The Landmark (CD)

Employer Skill Requirements – What skills shortages are employers reporting in Lancashire?

The **UK Employer Skills Survey** provides a comprehensive source of information on employer skills needs. Both for the 2015 and 2017 editions approximately 1,900 businesses in Lancashire were surveyed. The sample size means that data is only available at Lancashire level rather than by TTWA. Change since 2015 shown in brackets.

Skills Gaps within the current workforce.

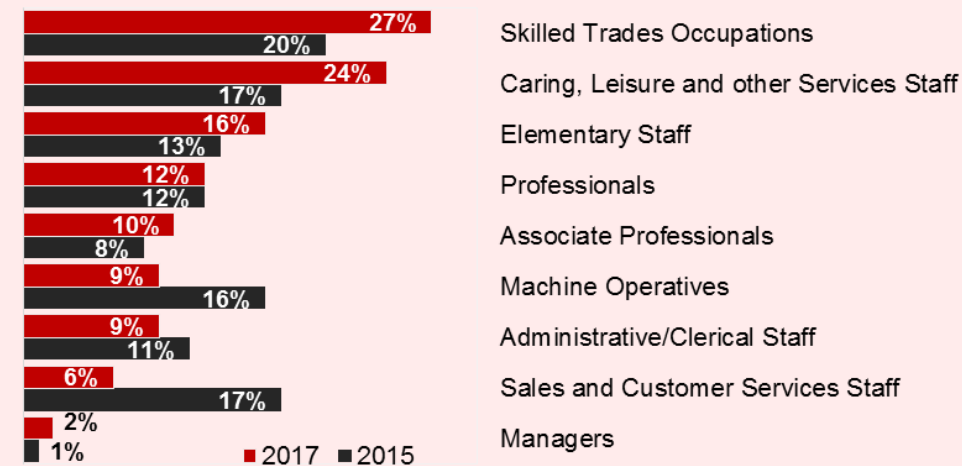
Skills Shortages – a lack of suitably skilled people when trying to recruit new workers.

16%(-1 percentage points 2015 to 2017) of employers in Lancashire report skills gaps, a greater proportion than the North West's 15% and 14% nationally.

20% (+3 percentage points 2015 to 2017) of employers reported at least one vacancy, in line with the North West and national average.

In 2017, **8% of Lancashire employers** said they had **hard to fill vacancies**, compared to 8% in England as a whole.

Hard to Fill Vacancies in Lancashire, by occupation:



Source: Employer Skills Survey

The top ten reasons reported by employers for employee skills gaps (2017):

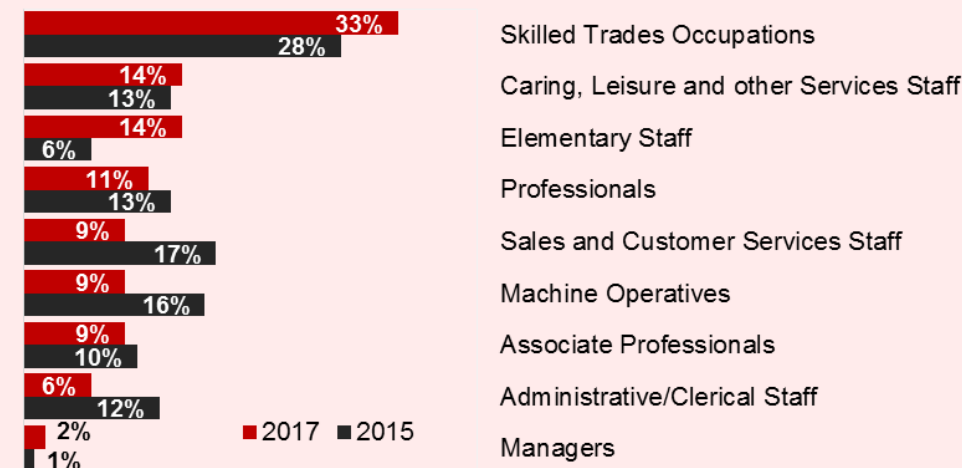
1. They are new to the role 65% (-1 percentage points.).
2. Their training is currently only partially completed 61% (-8 percentage points).
3. Staff lack motivation 30% (+6 percentage points.).
4. They have not received the appropriate training 28% (no change).
5. Unable to recruit staff with the required skills 28% (+11 percentage points.).
6. They have been on training but their performance has not improved sufficiently 27% (+5 percentage points.).
7. Problems retaining staff 21% (+15 percentage points.).
8. The introduction of new working practices 19% (-2 percentage points.).
9. The development of new products and services 16% (+3 percentage points.).
10. The introduction of new technology 16% (+2 percentage points.).

In both 2015 and 2017 Lancashire employers reported a higher proportion of hard to fill vacancies than the North West and national averages in: **Administrative and Clerical Occupations; Caring, Leisure and Other Service Staff; and Machine Operatives.** In 2017, this was also the case for **Skilled Trades** and **Elementary Roles.**


They also reported above regional and national average skills shortages in both years in **Skilled Trades**, and in 2017 for **Caring, Leisure and Other Services; Machine Operatives** and **Elementary Roles.**

In 2017, **5% of Lancashire employers** said they had vacancies due to **skills shortages**, compared to 6% nationally.

Skills shortage vacancies in Lancashire by occupation:



Employer Skill Requirements – What skills shortages are employers reporting in Lancashire?

Future training needs within the current workforce.	Skills surpluses	Training provided to staff																					
<p>Skills most needing development in the workforce according to employers (% of those anticipating the need for new skills in the next 12 months) – Top ten (2017):</p> <ol style="list-style-type: none"> 1. Adapting to new equipment 48%. 2. Role specific skills or knowledge 48%. 3. Organisation specific knowledge of goods and services 46%. 4. Complex problem solving 35%. 5. Knowledge of the organisation 35%. 6. Basic IT and computer skills 34%. 7. Advanced IT skills 29%. 8. Writing reports etc. 29%. 9. Comprehension of guidelines and reports 27%. 10. Complex numerical and statistical skills 19%. 	<p>In 2017, 45% of employers in Lancashire report having staff who are over-qualified in their current role, the same as in the North West and above the national average (42%)</p> <hr/> <p>In 2017, 37% of employers in Lancashire report having staff who are under-utilised (over-qualified and with more advanced skills) in their current role, above the North West (36%) and national averages (34%).</p>	<p>Occupations provided training in the last twelve months (% employers providing training in last 12 months, 2017).</p>	 <table border="1"> <caption>Training provided to staff by occupation (2017)</caption> <thead> <tr> <th>Occupation</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Managers</td> <td>62%</td> </tr> <tr> <td>Administrative/Clerical Staff</td> <td>37%</td> </tr> <tr> <td>Elementary Staff</td> <td>25%</td> </tr> <tr> <td>Sales and Customer Services Staff</td> <td>22%</td> </tr> <tr> <td>Skilled Trades Occupations</td> <td>20%</td> </tr> <tr> <td>Professionals</td> <td>15%</td> </tr> <tr> <td>Caring, Leisure and other Services Staff</td> <td>12%</td> </tr> <tr> <td>Machine Operatives</td> <td>11%</td> </tr> <tr> <td>Associate Professionals</td> <td>9%</td> </tr> </tbody> </table> <p><i>Source: Employer Skills Survey 2017</i></p>	Occupation	Percentage	Managers	62%	Administrative/Clerical Staff	37%	Elementary Staff	25%	Sales and Customer Services Staff	22%	Skilled Trades Occupations	20%	Professionals	15%	Caring, Leisure and other Services Staff	12%	Machine Operatives	11%	Associate Professionals	9%
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Machine Operatives	11%																						
Associate Professionals	9%																						
		<p>3.6 days is the average training in a year provided per member of staff in Lancashire employers providing training, compared to 3.8 regionally and 4.0 nationally (2017).</p>	<p>68% of employers in Lancashire report funding or arranging training for staff in the past 12 months, the same proportion in the North West and slightly above the national figure of 66% (2017).</p>																				

Employment Numbers and Trends

In 2018, there were 75,000 jobs in Burnley and Pendle accounting for 11.4% of the total in Lancashire, making it the fourth largest of the six Travel to Work Areas (TTWA) in employment terms.

Despite employment levels remaining static in the past year, the 4,000 extra jobs in the Burnley and Pendle since 2015¹ is proportionally the greatest employment uplift in any Lancashire TTWA between 2015 and 2018. This 5.6% increase in the number of jobs is also greater than in the North West as a whole (+5.1%) or nationally (+3.4%). This continues strong employment growth in the area post-recession as total employment also increased by 5,000 between 2009 and 2015.

Reported employment has grown in both local authorities since the previous toolkit reaching 40,000 in Burnley and 34,000 in Pendle in 2018 (6% and 5% of the Lancashire total respectively). Over the past year Burnley saw an employment increase of roughly 1,000 jobs (+2.7%), whereas job numbers in Pendle remained constant.

Sectoral Employment²

The sector profile of employment in Burnley and Pendle in 2018 bears significant differences to that of Lancashire:

- **Advanced Manufacturing** is the largest sector in Burnley and Pendle, with almost one in five workers employed in the sector (19%). This compares to just 12% across Lancashire and means that 18% of Lancashire's advanced manufacturing workforce (14,000) are based in the area. Advanced manufacturing is particularly prominent in Pendle, where 8,000 are employed in the sector (23.5% of all employment), reflecting a number of key employers located in the local authority.
- **Retail Including Motor Trades** accounts for a marginally larger proportion of employment than across Lancashire. The 11,000 people employed represent 14.7% of total employment, compared with 12.7% across Lancashire.
- Although it is the third largest sector in Burnley and Pendle **Human Health and Social Work**, accounts for a smaller fraction of

employment in the area relative to Lancashire as a whole. The sector provides 13.3% of employment, roughly 10,000 people, throughout Lancashire the sector is the largest, employing 14.2%

- **Finance and Professional Services** employ 9,000 people in the TTWA, which equates to 12.0% of total employment, a lower share than the 13.3% average across Lancashire. Both these proportions fall well below the North West and national level of 19.4% for the sector.
- **Education**, employs 7,000 people and has a similar share of total employment as in Lancashire.
- **Logistics, Administration and Support Services** and the **Visitor Economy** all employ 5,000 people each in Burnley and Pendle, but they all represent a smaller proportion of employment than typical for the Local Enterprise Partnership (LEP) area.

Sectoral Trends

Between 2015 and 2018, employment in three of Lancashire's priority sectors has increased in Burnley and Pendle:

- Advanced Manufacturing: +2,000 (+17%).
- Finance and Professional Services: +1,000 (+13%).
- Logistics: +1,000 (+20%).

The increases in Advanced Manufacturing employment have been concentrated in Burnley, whilst Pendle has captured the majority of new Finance and Professional Services jobs have occurred. Retail Including Motor Trades and Other Manufacturing have also experienced employment growth, adding an additional 2,000 and 1,000 jobs respectively.

Employment has fallen in two priority sectors between 2015 and 2018. Latest data shows 500 fewer jobs in Energy and Environmental Technologies and 200 fewer in the creative and digital sector than in 2015. The fall in Creative and Digital employment is in line with the LEP as a whole, whereas the fall in the Energy and Environmental jobs does not reflect wider trends.

Sources: Business Register and Employment Survey 2015-2018

¹ The 2015-2018 period is used to provide longer-term trend data as consistent data is available for these years

² The analysis of employment by sector in the 2019 Toolkit report uses Lancashire's priority sector definitions. These are different to the definitions used in the 2018 Toolkit report. The data matrix contains time series data for both definitions

Local Authority District Sectoral Employment

As reported in the previous toolkit, **Burnley** still dominates the TTWA's employment in public and private service based activities. Burnley represents approximately 53% of total employment in the TTWA but nearly 65% of the public sector employment in Burnley and Pendle, with large proportions of the TTWA's Health (7,000), Education (3,500) and Public Administration (1,000) employment, despite a fall in the number of Education jobs since preparation of the previous toolkit. The majority of the TTWA's Retail and Motor Trade jobs are located in Burnley, employing 6,700 people, 60% of the Burnley and Pendle total in 2018.

Pendle's employment base, as noted above, is heavily manufacturing focused. Within Pendle Advanced Manufacturing has three times the share (28.1%) of total employment as the national average (9.2%), and although Pendle contributes less than 5% of Lancashire's total employment, it provides nearly 10% of its Advanced Manufacturing employment. Other sectors where at least half the TTWA's employment is located in Pendle are Construction (1,500) and Energy and Environmental Technologies (1,250) in 2018.

Employment Locations

Employment is distributed across the Burnley and Pendle TTWA, with concentrations in the key centres, along transport routes, such as the M65 and A56, and at major employment locations such as the Lomeshaye and Whitewall industrial estates.

Employer Skill Requirements

The UK Employer Skills Survey 2017 provides a comprehensive source of information on employer skills needs. Data is available for Lancashire based on responses from 1,900 businesses.

The data from the survey covers both the current workforce (skills gaps, training provided) and experience of recruitment (vacancies, hard to fill and skills shortage vacancies, recruitment methods) and asks employers about the skills they will need in future.

Skills Gaps

Considering the current workforce, 16% of Lancashire employers said that at least some of their workers had skills gaps (i.e. they were not fully proficient in their current role). This is a slight fall from 17% in 2015, but remains higher than the regional (15%) and national averages (14%).

The main reasons for skills gaps within the workforce reported by Lancashire employers in 2017 are:

- They are new to the role (65% of employers).
- Employee training is currently only partially complete (reported by 61%).
- Staff lack motivation (30%).
- They have not received the appropriate training (28%).
- Unable to recruit staff with the required skills (28%).
- They have been on training but their performance has not improved sufficiently (27%).

Employers in Lancashire were much more likely to cite problems retaining skilled staff as a cause of skills gaps (20%) than those in the North West (14%) or nationally (13%).

Over-Qualification

In addition to skills gaps, employers also identified staff within their workforce who were over-qualified for their current role, or under-utilised within the role (i.e. both over-qualified and have skills which are more advanced than are needed in their role). Forty-five percent of Lancashire employers said they had at least one employee who was over-qualified for their role, the same as the regional proportion and higher than the number saying the same nationally (42%).

Thirty-seven per cent said they had under-utilised staff, slightly higher than the regional (36%) and national shares (34%).

Employer-Provided Training

In 2017, 68% of employers in Lancashire said they provide training to their staff, with 54% providing on-the-job training and 49% providing off-the-job training. On average, Lancashire employers provided 3.6 days of training per trainee, compared to 3.8 days per trainee on average in the North West and 4.0 days nationally.

The most commonly provided types of training are job specific training (85% of employers), health and safety / first aid training (73%) and induction training when staff first start in their role (67%). Lancashire employers are less likely than the regional and national average to provide training in new technology (44% of employers, compared to 49% regionally and 47% nationally).

Different occupations benefit from different levels of training. Managers and directors are the occupational group most likely to receive training - with 62% of Lancashire employers providing training to this group. Associate Professionals are the group least likely to be trained (9% of employers said they train this group). Employers in Lancashire are more likely to say they train workers in Elementary jobs (25% of employers) than is the case regionally (21%) or nationally (18%). Two main barriers were identified by Lancashire employers which prevent them from offering more training to staff - being unable to spare the time for staff to go on training (53%) and the expense / cost of training (47%). Very few employers identified a lack of provision (2%) or a lack of good quality provision (3%) as barriers to providing training.

Skills in need of development, identified by Lancashire employers, include adapting to new equipment, role-specific skills and organisation-specific knowledge. Over one-third of Lancashire employers said basic IT and computer skills would need development, slightly higher than the national level (34% compared to 31%) and 29% said advanced IT skills would be required, compared to 30% nationally.

Recruitment and Recruitment Difficulties

One in five Lancashire employers surveyed said that they had at least one vacancy in 2017, the same proportion as regionally and nationally, but up from 17% in 2015. Eight per cent said that at least one vacancy was hard to fill, with 5% saying that they had a skill shortage vacancy, i.e. a vacancy which is hard to fill due to skills shortages amongst potential applicants. The most commonly used recruitment methods were via social media or the company's website. Employers in Lancashire are much more likely to use a government recruitment service or scheme than is the case nationally (29% compared to 22%).

Lancashire employers most commonly reported hard to fill vacancies in Skilled Trades (27%), and Caring, Leisure and Other Services (24%) and Elementary Occupations (16%). All of these occupations accounted for a higher proportion of hard to fill vacancies in 2017 than in 2015. Skills shortage vacancies were also most common across these occupations, with one-third linked to Skilled Trades Occupations. Employers in the Transport and Storage and Construction sectors were most likely to report skill shortage vacancies. The skills most difficult to obtain from applicants were specialist skills and knowledge (stated by 24% of employers) and the ability to manage their own time (13% of employers).

Employment Forecasts 2018-2028 – Which sectors will employ people in Burnley and Pendle in the future?

Forecast 10-Year Employment Change, 2018-2028

	Burnley & Pendle		Lancashire	UK
2018-2028	820	1.0%	2.6%	5.2%

Top 5 Sectors requiring employees due to sector growth (expansion demand)



- **Administrative and Support Services** (+50 new jobs each year).
- **Wholesale and Retail Trade** (+40 new jobs each year).
- **Construction** (+40 new jobs each year).
- **Professional, Scientific and Technical Activities** (+30 new jobs each year).
- **Information and Communication** (+20 new jobs each year).

Top 5 Sectors requiring employees to fill jobs to replace people leaving or changing jobs (replacement demand)



- **Wholesale and Retail Trade** (1,390 jobs each year).
- **Manufacturing** (1,220 jobs each year).
- **Health and Social Work** (860 jobs each year).
- **Administrative and Support Services** (710 jobs each year).
- **Accommodation and Food Services** (690 jobs each year).

Total Employment Requirement Across all Sectors 2018-2028

To meet sector growth and replace people leaving or changing jobs

Sector	Part of Priority Sector?	Average Annual Requirement	Total Requirement
Wholesale and Retail Trade		1,440	15,810
Manufacturing	- Advanced Manufacturing - Creative and Digital - Energy and Environmental Tech	1,030	11,330
Human Health and Social Work Activities	- Health and Social Care	860	9,470
Administrative and Support Service Activities	- Finance and Professional Services - Visitor Economy	750	8,290
Accommodation and Food Service Activities	- Visitor Economy	700	7,730
Education	- Creative and Digital	620	6,860
Construction	- Construction - Energy and Environmental Tech	440	4,850
Information and Communication	- Creative and Digital - Finance and Professional Services	430	4,710
Arts, Entertainment and Recreation	- Creative and Digital - Visitor Economy	400	4,450
Professional, Scientific and Technical Activities	- Finance and Professional Services - Advanced Manufacturing - Creative and Digital - Energy and Environmental Tech	340	3,710
Transportation and Storage	- Visitor Economy	250	2,720
Other Service Activities		200	2,190
Public Administration and Defence		120	1,310
Real Estate Activities	- Finance and Professional Services	110	1,200
Financial and Insurance Activities	- Finance and Professional Services	70	710
Agriculture, Forestry and Fishing		<50	420
Water Supply; Sewerage etc.	- Energy and Environmental Tech	<50	390
Electricity, Gas, Steam and Air Conditioning Supply	- Energy and Environmental Tech	<50	<50
Mining and Quarrying	- Energy and Environmental Tech	<50	<50

Forecast 10-Year Employment Change, 2018-2028

	Burnley & Pendle		Lancashire	UK
2018-2028	820	1.0%	2.6%	5.2%

Top 3 Occupations requiring employees due to sector growth (expansion demand)



- **Sales and Customer Service Occupations** (+20 jobs each year).
- **Caring, Leisure and Other Service Occupations** (+10 jobs each year).
- **Managers, Directors and Senior Officials** (+10 jobs each year).

Top 5 Occupations requiring employees to fill jobs to replace people leaving or changing jobs (replacement demand)



- **Elementary Occupations** (1,150 jobs each year).
- **Caring, Leisure and Other Service Occupations** (1,140 jobs each year).
- **Professional Occupations** (1,070 jobs each year).
- **Managers, Directors and Senior Officials** (890 jobs each year).
- **Sales and Customer Service Occupations** (820 jobs each year).

Total Employment Requirement Across all Occupations 2018-2028

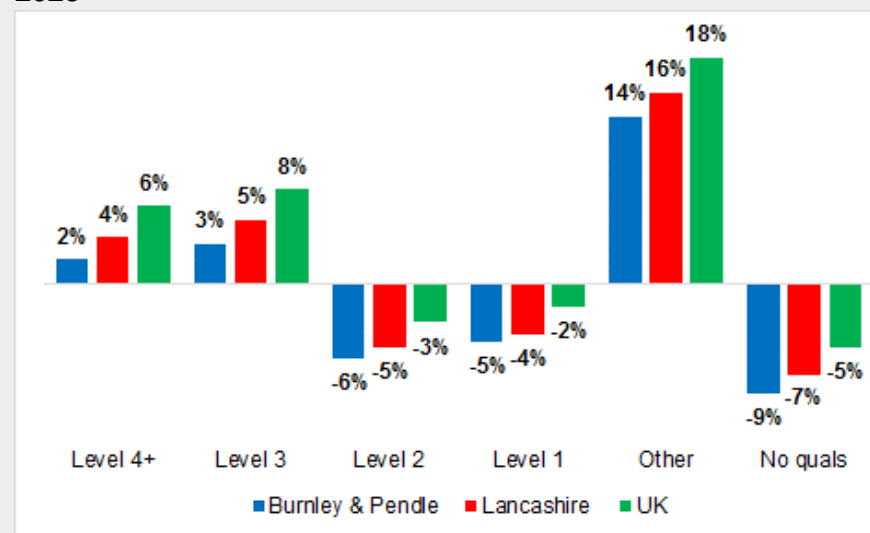
To meet occupational growth and replace people leaving or changing jobs

Occupation*	Average Annual Requirement	Total Requirement
Elementary Occupations	1,160	12,710
Caring, Leisure and Other Service Occupations	1,150	12,680
Professional Occupations	1,070	11,760
Managers, Directors and Senior Officials	910	9,960
Sales and Customer Service Occupations	830	9,150
Associate Professional & Tech Occupations	730	8,000
Administrative and Secretarial Occupations	720	7,890
Skilled Trades Occupations	680	7,450
Process, Plant and Machine Operatives	600	6,600

Skills Forecasts 2018-2028 – How will skills needs change in Burnley and Pendle?

Forecast 10-Year Employment Change by Highest Qualification Level, 2018-2028			
Qualification Level	2018	2028	Change
Level 4+	50,778	51,697	+919
Level 3	29,241	30,135	+893
Level 2	25,526	23,855	-1,670
Level 1	21,160	20,017	-1,144
Other*	16,138	18,257	+2,118
No Qualifications	16,960	15,317	-1,643

Change in employment by highest qualification level, 2018-2028



In line with forecast trends across the county and country, the typical qualifications held by people employed within Burnley and Pendle are expected to shift upwards. The Burnley and Pendle economy is anticipated to employ 900 more people with qualifications at Level 3 or higher by 2028, whilst the total employment of people with qualifications lower than Level 2 is set to fall over the next ten years.

At a Lancashire level there is forecast to be a particular rise in Level 3 and 4 qualified workers in: Administrative and Secretarial Occupations, and Caring, Leisure and Other Service Occupations. Other qualifications* (including Apprenticeships) are expected to be required in Skilled Trade Occupations and Sales and Customer Service Occupations.

Employment Forecasts – Total Employment

Forecasts provide an indication of the future growth of an economy but are not set in stone. Between 2018 and 2028, over 800 new jobs are expected to be created in Burnley and Pendle, representing a 1% increase in total employment. This is below the growth forecast across Lancashire (2.6%) and the national average (5.2%). Over the same period, the working age population is expected to fall. These forecasts provide an indication of the direction of travel for the Burnley and Pendle economy, but the actual growth achieved will depend on a number of factors including the level of investment secured over the next ten years.

Job Opportunities

There will be a wide range of job opportunities available between 2018 and 2028, with recruitment across all sectors and occupations, including in each of Lancashire's priority sectors and in sectors which have recently experienced overall employment decline such as Manufacturing, Accommodation and Food and Arts, Entertainment and Recreation. This will include recruitment for new jobs created through sector growth (expansion demand) and jobs that become available as people leave or change jobs (replacement demand).

Typically across all sectors and occupations, replacement demand will be much greater than expansion demand, meaning that people are more likely to enter existing rather than newly created jobs. The high levels of replacement demand reflect factors such as the ageing population with many current workers due to retire from the workforce over this period.

Job Opportunities by Sector

Forecasts show that: **Wholesale and Retail Trade** will provide the highest number of opportunities in Burnley and Pendle – almost 16,000 people to fill jobs between 2018 and 2028. On average, this will equate to 1,400-1,500 people being recruited to these sectors each year.

This is followed by **Manufacturing**, where there is a total requirement for over 11,000 people between 2018 and 2028 – or approximately 1,000 people per annum on average, and **Human Health and Social Work** and

Administrative and Support Services, which will both have opportunities for at least 750 people per annum.

Other sectors offering opportunities for over 3,000 people between 2018 and 2028 include:

- Accommodation and Food Service Activities (700 per annum).
- Education (620 per annum).
- Construction (440 per annum).
- Information and Communication (430 per annum).
- Arts, Entertainment and Recreation (400 per annum).
- Professional, Scientific and Technical Activities (340 per annum).

Job Opportunities by Occupation

Across the sectors, a range of occupations will be available. In Burnley and Pendle, there will be opportunities for at least 6,600 people within each occupational group (equivalent to at least 600 per annum) between 2018 and 2028.

Requirements will be highest for **Elementary Occupations**, with opportunities for just under 13,000 people (1,200 per annum), followed by **Caring, Leisure and Other Service Occupations** with opportunities for over 12,000 people (more than 1,100 per annum). There will also be opportunities for over 9,000 people in **Professional; Manager, Director and Senior Official**; and **Sales and Customer Service** roles.

Skills Requirements

In line with trends forecast for Lancashire and nationally, demand for higher level skills is expected to increase, as reflected by an upwards shift in the skills profile of the workforce. By 2028, a higher number of people employed in the Burnley and Pendle economy will hold qualifications at Level 3 and above, (although the proportionate change is expected to be less significant than Lancashire and UK wide), while the number in employment with qualifications at level 2 or below or no qualifications will fall. The number of people in employment with other qualifications, such as apprenticeships, is also expected to increase. This trend typically applies across all occupations.

Key Stage 1 to 4 (GCSE) in Burnley and Pendle

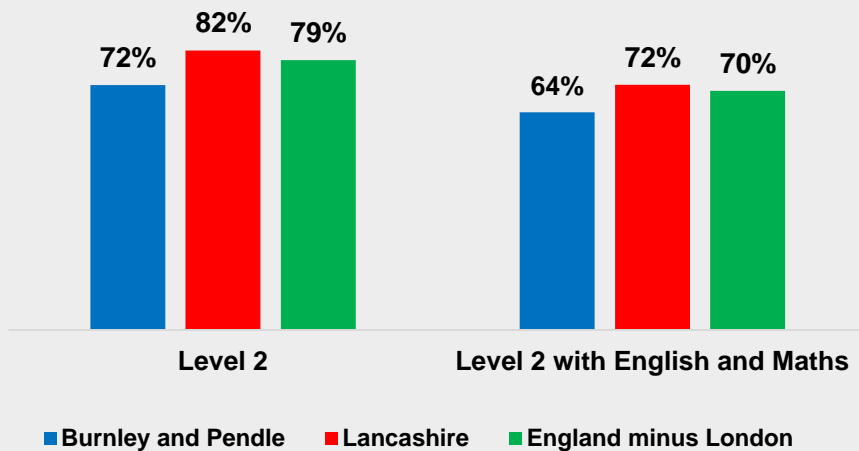
Age Group	Performance Measure	What is happening in Burnley and Pendle?	National comparison
Key Stage 1 5-7 years	% of pupils who meet the required standard of 'phonic decoding': using knowledge of phonics to accurately read words.	In Lancashire*, approximately 81-82% of Year 1 pupils meet the standard, and 91% of Year 2 pupils.	Year 1: 81% Year 2: 91%
Key Stage 2 8-11 years	% of pupils who meet the required standards in reading, writing and mathematics.	56% (+11 percentage points since 2016) of pupils meet the standard, ranging from 55% in Burnley to 56% in Pendle, compared to 63% in Lancashire (North West - 64%).	England excluding London: 64%
Key Stage 4 14-16 years (Recent changes to the GCSE system mean there are three separate performance measures).	Average Attainment 8 score: A measure of attainment – a pupil's average score across a set of eight subjects including English and maths.	41.9 (-2.8 since 2016) , ranging from 40.0 in Burnley to 43.7 in Pendle, compared to 45.8 across Lancashire.	England excluding London: 43.7
	Average Progress 8 score: A measure of relative progress - the comparison of pupils' Attainment 8 score with the average Attainment 8 score of all pupils nationally who had a similar KS2 results (0.0 = the national average).	-0.18 (-0.02 since 2016) Ranging from -0.29 in Burnley to -0.07 in Pendle, compared to -0.12 across Lancashire and 15% in the North West.	England excluding London: -0.06
	% achieving English Baccalaureate: grade 5 or above in English and maths GCSE, plus C or above in science, a language and history or geography.	11% (-4 percentage points since 2016) achieve the EBacc, in both Burnley and Pendle compared to 13% across Lancashire as a whole.	England excluding London: 14%
Destinations at age 16	Percentage of pupils in overall sustained education and / or employment / training destination.	92% (+2 percentage points) compared to 95% across Lancashire as a whole and the North West average.	England excluding London: 95%

Sources: Department for Education Attainment Data by age 19 and by disadvantaged pupils, 2017/18; Percentages of overall pupil destinations after completing key stage 4 / key stage 5 2014/15 - 2016/17 destinations for the 2013/14 cohort

* this indicator is not reported at the TTWA level

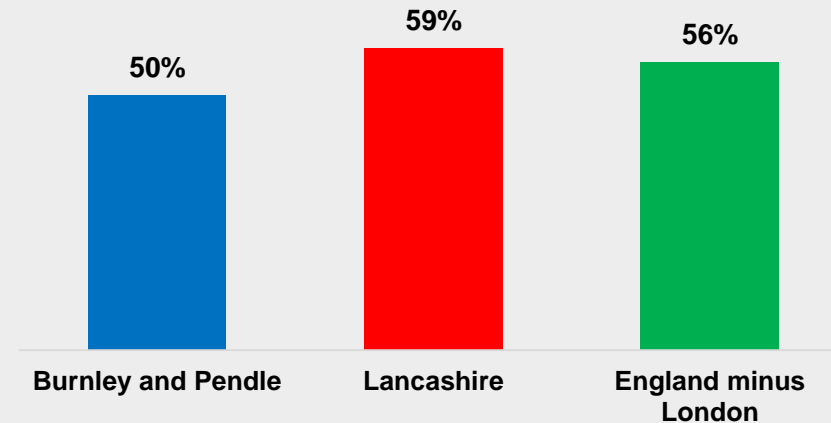
Young people aged 16-19 – Attainment by age 19 in Burnley and Pendle

Level 2 attainment by age 19, 2017/18



Source: Department for Education Attainment Data by age 19 and by disadvantaged pupils, 2017/18

Level 3 attainment by age 19, 2017/18



Source: Department for Education Attainment Data by age 19 and by disadvantaged pupils, 2017/18

KS5 Destinations, 2016/17

82% (-5 percentage points since 2014/15*)
of students in Burnley and Pendle enter sustained education or employment after Key Stage 5.

62% (-6 percentage points)
Enter sustained education.

20%
(+1 percentage points)
Enter sustained employment.

53%
(+1 percentage points)
Higher education institutions.

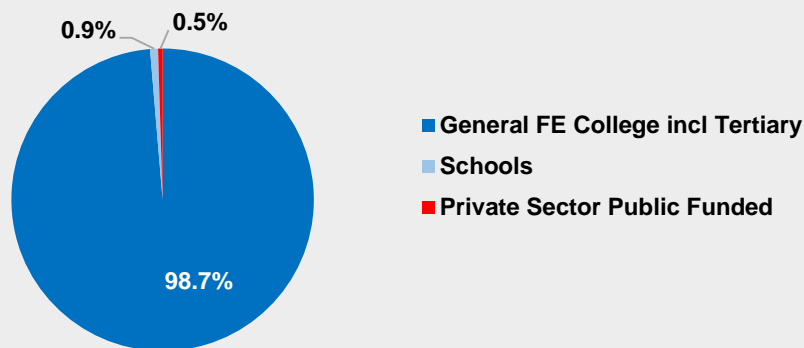
7%
(-6 percentage points)
Further education institutions.

Of which **8%**
(+1 percentage points)
are apprentices.

Further Education: TTWA Provider Perspective – What Further Education Provision is Available?

Providers in the TTWA accounted for 22,930 students participating[^] in Further Education in 2018/19 – the highest out of Lancashire’s Travel to Work Areas (TTWAs)*.

Share of Further Education (FE) provision (% of Participants) in Burnley and Pendle by Provider Type, 2018/19



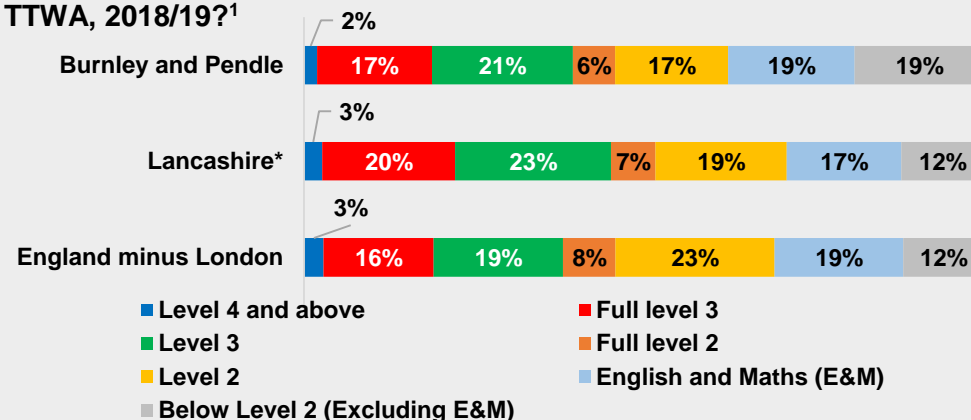
Source: DfE FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19; School, Pupils, and their Characteristics, January 2019 (Key Stage 5 Years 12 - 14)

Based on the latest 2018/19 data, General FE Colleges account for almost all FE students at providers based in the Travel to Work Area (TTWA), equal to just over 22,600 students. This proportion is considerably higher than the Lancashire average (64%), regional (52%), and national levels (51%).

Where data is available, the age profile of students studying at TTWA based FE providers older than the Lancashire and national profile¹. Just over two-thirds (68%) of students were over the age of 19[§], higher than Lancashire (47%) and national levels (51%). Ethnic minority groups (accounting for 19% of participants) are also slightly over-represented in the TTWA’s provider organisations relative to the Lancashire and national levels (both 18%).

Providers based in the TTWA cater for a lower proportion of students studying Full Level 3 (17%) and Level 3 (21%) compared to the Lancashire (20% and 23%) but higher than the national profile (16% and 19%)¹. Likewise, there is a higher proportion studying below Level 2 (19%) compared to Lancashire and national levels (12% each).

What level are FE students studying with providers in the TTWA, 2018/19¹



Source: DfE FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19

* Lancashire figures exclude West Lancashire College, which reports as part of Newcastle College Group.

Figures may not sum due to rounding.

FE Learner Characteristics by Provider Location, 2018/19¹

	Burnley and Pendle	Lancashire	England minus London
Age			
Under 19	21%	39%	31%
19-24	10%	14%	17%
25+	68%	47%	51%
Gender			
Female	63%	54%	55%
Male	37%	46%	45%
Ethnicity			
Black, Asian or Minority	19%	18%	18%
White	81%	82%	82%

Source: DfE FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19

Figures may not sum due to rounding.

* Lancashire figures exclude West Lancashire College, which reports as part of Newcastle College Group

Sources: Department for Education FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19; School, Pupils, and their Characteristics, January 2019

[^] All figures on this page relate to participation – a count of the number of people starting, continuing and achieving in FE in that year.

¹ Due to data limitations, the analysis of the level of provision and learner characteristics relates to FE provision that is ESFA-funded and captured in Individualised Learner Record returns only.

This excludes an element of school sixth form provision which accounts for 196 learners.

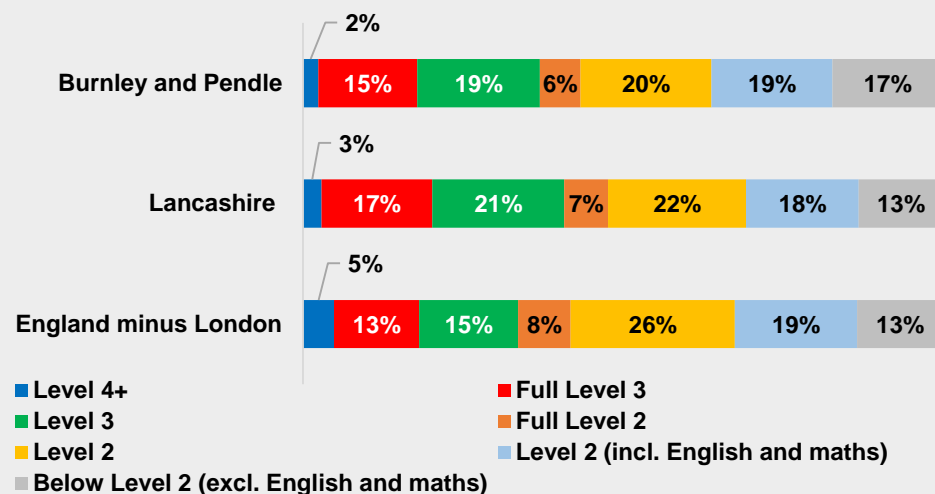
[§] This figure is skewed by Nelson and Colne College reporting 81% of learners over the age of 25, reflecting strong adult learning provision.

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In 2018/19, there were a total of 14,490 Burnley and Pendle residents participating[^] in Further Education (FE) – the fourth highest level across Lancashire’s Travel to Work Areas (TTWAs).

Level of Study by FE learners living in the TTWA, 2018/19

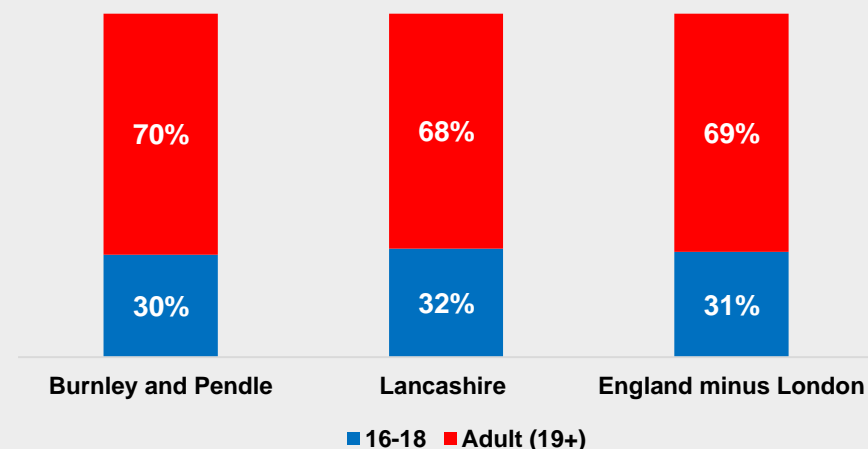


Source: Department for Education: Further Education and Skills Geography 2014/15 to 2018/19.
 *Figures represent the learner aims by level due to students being able to study multiple level courses. Figures also do not include aims where there is no level assigned.
 Figures may not sum due to rounding.

In 2018/19, there were approximately 14,490 Burnley and Pendle residents participating in Further Education (FE) – the fourth highest count across Lancashire’s Travel to Work Areas (TTWAs).

Across the TTWA, the proportion of learner aims that are at a Level 4 (2%) are lower than Lancashire (3%) and national levels (5%). Likewise, there is a smaller proportion of learner aims that are at Level 3 (19%) and Full Level 3 (15%) compared to Lancashire levels (21% and 17% respectively) but more than the national profile (15% and 13% respectively).

Age profile of FE learners living in the TTWA, 2018/19



Source: Department for Education: Further Education and Skills Geography 2014/15 to 2018/19.
 *Figures represent the learner aims by level due to students being able to study multiple level courses. Figures also do not include aims where there is no level assigned.

Three in ten Burnley and Pendle residents participating in FE are aged between 16 and 18, less than Lancashire (32%), regional and national profiles excluding London (both 31%).

Apprenticeships: TTWA Provider Perspective – Apprenticeship participation by subject and by level

In 2018/19, Burnley and Pendle based providers* recorded 4,460 learners participating^ in apprenticeships – the fourth highest level across Lancashire’s Travel to Work Areas (TTWAs).

Apprenticeships in TTWA based providers by subject, 2018/19

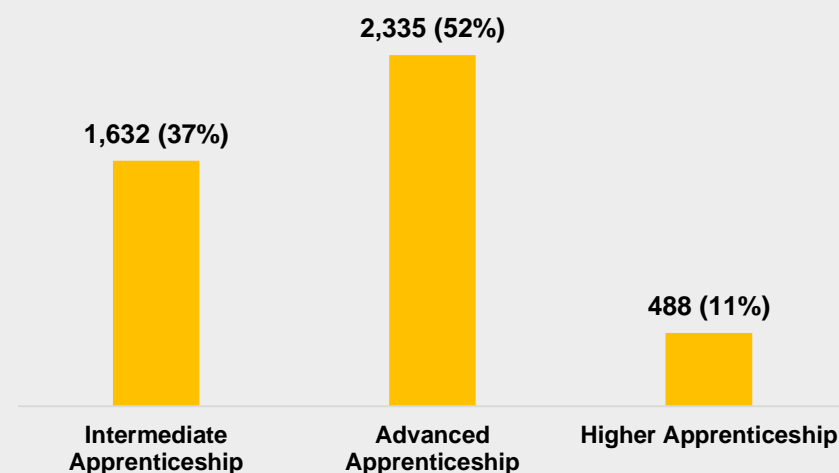


Source: DfE Apprenticeship participation/achievements by sector subject area, provider, framework/standard, local authority district: 2014/15 to 2018/19
Totals may not sum due to rounding.

Based on the latest 2018/19 data, Burnley and Pendle based providers account for approximately 4,460 learners participating in apprenticeships – the fourth highest number of participants across Lancashire’s TTWAs.

Almost three in ten apprentices registered with providers in the TTWA are completing Engineering and Manufacturing Technologies training. This is followed by Business Administration and Law (25%); Health, Public Services and Care (20%); and Retail and Commercial Enterprise (9%), which together account for four-fifths of all apprenticeship provision.

Apprenticeships in TTWA based providers by level, 2018/19



Source: DfE Apprenticeship participation/achievements by sector subject area, provider, framework/standard, local authority district: 2014/15 to 2018/19

In 2018/19, just under two-fifths (37%) of apprentices registered with providers in the TTWA were participating in intermediate level apprenticeships, equal to 1,630 learners. This compares to 36% of provision being at this level across the LEP and regionally and 38% nationally (excluding London).

Just over three-fifths (63%) of apprentices registered with providers in the TTWA were participating in advanced or higher level apprenticeship courses. This is slightly lower than LEP (64%) and regional (64%) averages but slightly higher than nationally, excluding London, (62%).

Sources: Department for Education Apprenticeship participation/achievements by sector subject area, provider, framework/standard, local authority district: 2014/15 to 2018/19

* reflecting the local authority district delivery location stated in the Individual Learner Record (ILR)

^ All figures on this page relate to participation – a count of the number of people starting, continuing and achieving in that year

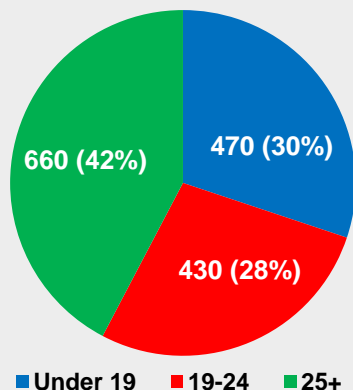
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Apprenticeships: TTWA Learner Perspective – Who started an apprenticeship?

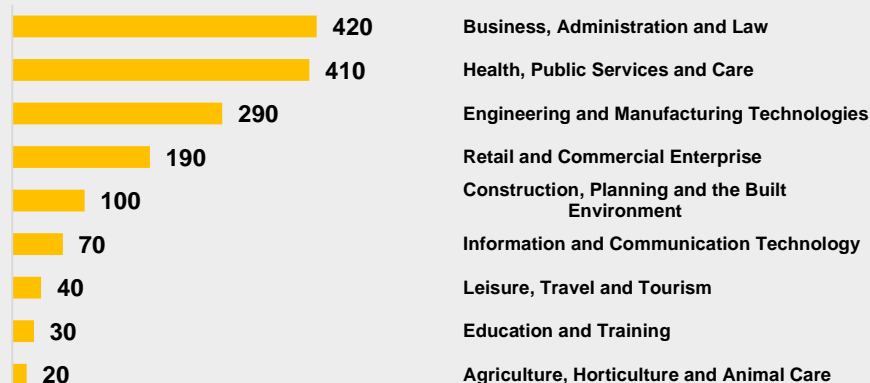
A total of 1,550 Burnley and Pendle based residents started apprenticeships in 2018/19 – an increase of 8% on 2017/18 levels.

Apprenticeship starts* by Burnley and Pendle residents by age, 2018/19



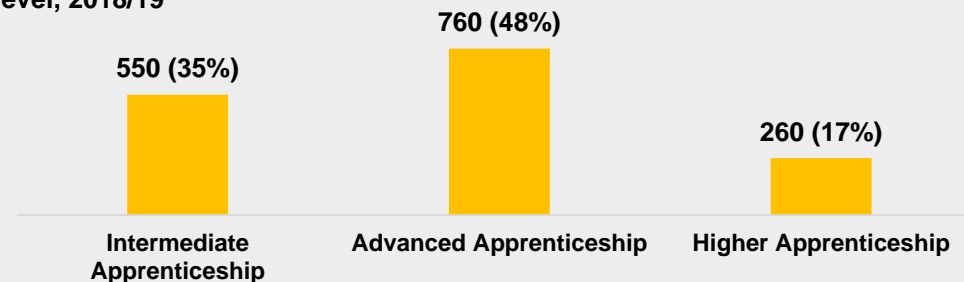
Source: DfE : Apprenticeships geography and sector subject area PivotTable tool: starts and achievements 2018 to 2019

Apprenticeship starts by Burnley and Pendle residents by subject, 2018/19



Source: DfE : Apprenticeships geography and sector subject area PivotTable tool: starts and achievements 2018 to 2019
Figures may not sum due to rounding.

Apprenticeship starts by Burnley and Pendle residents by level, 2018/19



Source: DfE : Apprenticeships geography and sector subject area PivotTable tool: starts and achievements 2018 to 2019

The age profile of TTWA resident apprentices in 2018/19 shows:

- There was a higher proportion of younger learners under the age of 19 (30%) compared to Lancashire (28%), regional and national levels (26% each).
- The proportion of apprentice starts over the age of 25 (42%) was lower than in each of these comparator areas.

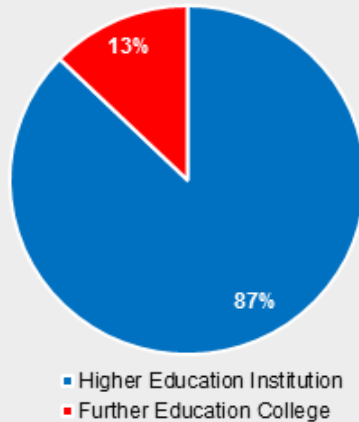
TTWA residents are more commonly starting advanced and higher apprenticeships (65%) than across Lancashire and the North West (both 64%) and across England (excluding London) (63%).

The profile of subjects studied is fairly consistent with the Lancashire profile, with the main differences including:

- A higher proportion of starts in **Engineering and Manufacturing Technologies** (18%) compared to Lancashire, the North West and nationally (each 15%).
- A higher proportion of starts in **Leisure, Travel and Tourism** (3%) compared to all other geographies (2% each).
- A lower proportion of starts in **Health, Public Services and Care** (26%) compared to Lancashire and the North West (27% each) but higher than nationally (25%).
- A lower proportion of starts in **Business, Administration and Law** (27%) compared to Lancashire (30%), the North West (31%) and nationally (30%).

In 2017/18 there are 56,460 (+5% since 2016/17) students studying with 16 different Higher Education (HE) providers in Lancashire (including Further Education (FE) and alternative providers).

Location of provision for HE Students in Lancashire, 2017/18



Source: Higher education full time equivalent (FTE) 2017/18 calculated using HESA student, HESA AP student or ILR data.

FE colleges are an important part of HE provision and teach a significant proportion of HE students in Lancashire - around 13% in 2017/18. Unfortunately, the data which used to be available on HE students in FE Colleges (from HEFCE) is no longer produced. The remainder of this section therefore provides data on HE students studying in Lancashire's HE institutions only.

Nearly three quarters of students at Lancashire's Higher Education Institutions (HEI's) are from the North West. Leeds City Region is the Local Enterprise Partnership (LEP) area outside the North West from which the greatest proportion of HEI students come from (4%).

The proportion of International HEI students (13%) is seven percentage points below the national average (20%).

Domicile of HEI students studying in Lancashire, 2016/17

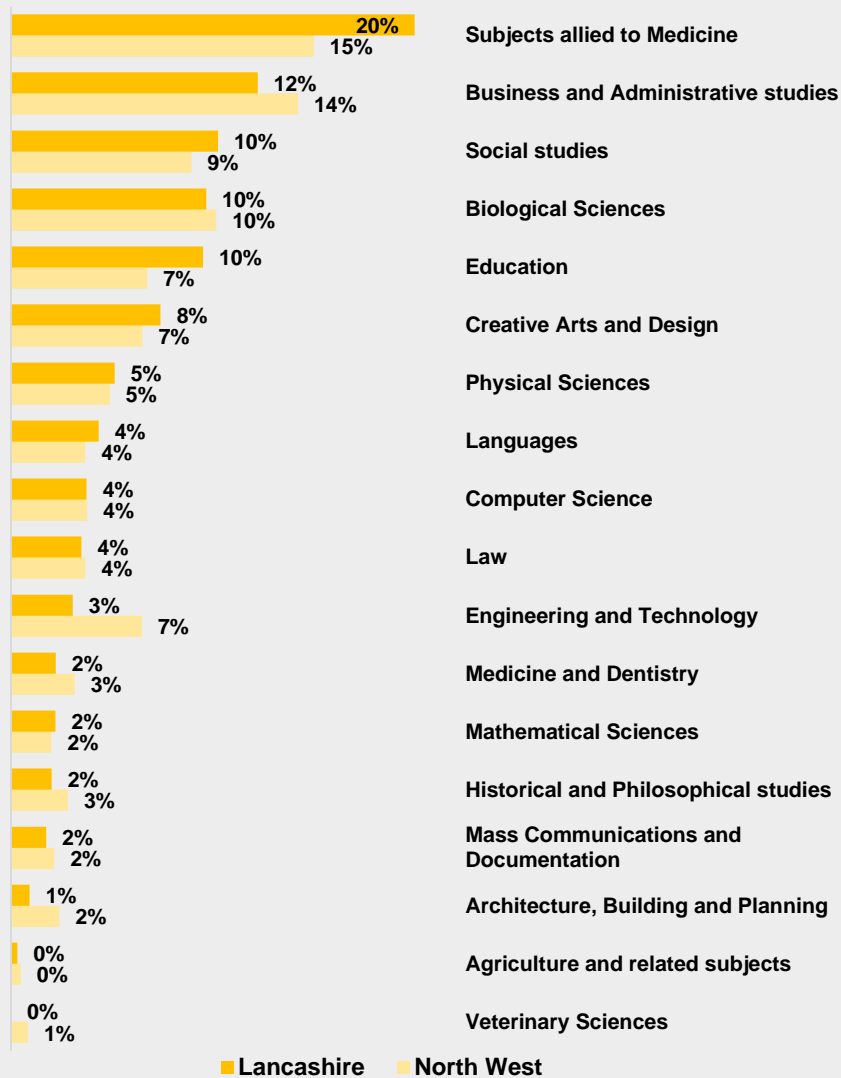
	Lancashire	North West	England
Total UK	87%	83%	80%
Other EU	4%	4%	6%
Non-EU	9%	13%	14%

Source: HESA Destination of Leavers from Higher Education, 2016/17

Where do Lancashire's higher education students come from in 2016/17?

1. Lancashire (32%)
2. Greater Manchester (18%)
3. Liverpool City Region (16%)
4. Cheshire and Warrington (4%)
5. Cumbria (4%)

Higher Education students by subject in Lancashire, 2017/18



Source: HESA, 2019. HE student enrolments By HE Provider and Subject of Study

Higher Education Providers in Lancashire,

>> *Based in Burnley and Pendle:*

There are no Higher Education (HE) Institutions within the TTWA.

>> *Based elsewhere in Lancashire:*

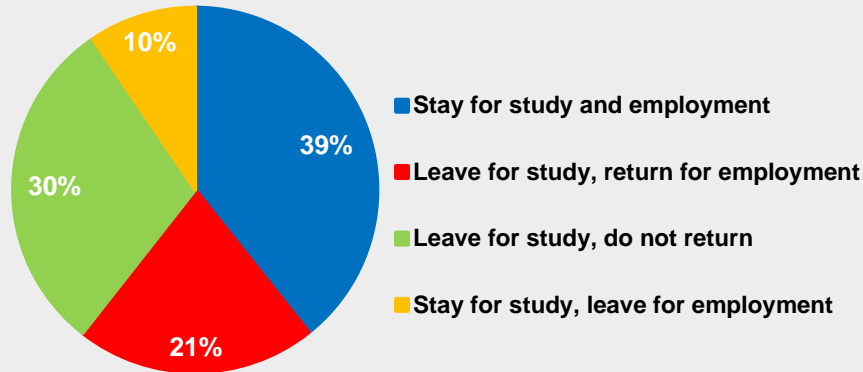
- University of Central Lancashire
- Lancaster University
- Edge Hill University
- University of Cumbria (which has a major campus in Lancaster)

A number of Further Education providers are recognised to deliver Higher Education courses in Lancashire but no data is available to quantify the scale of this provision.

In Lancashire's HE institutions in 2017/18, 20% of students are studying subjects allied to medicine, compared to 15% regionally and 12% nationally. In contrast, only 3% of students at HE institutions in Lancashire study engineering and technology, compared to 7% regionally and nationally.

There is a higher proportion of students at Lancashire based HE institutions studying education compared to the North West (7%) and nationally (6%).

Lancashire Residents Participating in Higher Education (HE), 2014/15*



Source: HEFCE 2014/15

The most recent available data shows, just over three-fifths (61%) of Lancashire residents who participate in HE go into employment in Lancashire. This proportion is similar to the national average for a LEP area (60%).

A higher proportion stay to study and then work locally than the national LEP average (29%), while the proportion who leave to study outside Lancashire and then return to work locally is lower than the national LEP average (30%).

HE Destinations, 2016/17

Where do Lancashire’s students go to work, 2016/17?

The top 5 LEP area destinations:

1. Lancashire (32%)
2. Greater Manchester (18%)
3. Liverpool City Region (15%)
4. London (4%)
5. Cheshire and Warrington (4%)

Source: HESA Destinations of Leavers Survey and Student Record, 2016/17

Outcomes achieved by students of Lancashire’s Higher Education Institutions (HEI):

One year

After one year, 69% of graduates from Lancashire’s Higher Education Institutions are in sustained employment. 7% of graduates have no sustained destination (decreased by 3 percentage points since 2015/16), slightly lower than the average for all institutions in the North West where the figure is 8%.

Three years

After three years, the proportion in sustained employment rises to 72%, and 11% have no sustained destination, higher than the North West figure (6%).

Five years

After five years, the proportion in sustained employment increased to 77%. The number with no sustained destination falls to 6%, equal to the regional average.

The Education and Skills System

Data is available for all levels of the education and skills system, from Key Stage (KS) 1 through to Higher Education (HE). The data through to KS5 shows how well education, skills and training providers and residents in the Travel to Work Area (TTWA) are performing, as well as providing an indication of the choices that residents make after leaving school.

Data for HE is available at the Lancashire level. Unfortunately, the most detailed data is now only available for students studying at Lancashire's Higher Education Institutions (HEI), and not those studying HE courses in Further Education (FE) colleges, which accounts for a significant share of HE in Lancashire. The data covers students that study in Lancashire, regardless of where they come from unless otherwise stated.

Key Stage 1 and 2

Across Lancashire more than eight out of ten year 1 pupils met the required standard of phonic decoding (81%) in 2017/18, in line with the North West and national averages. This increases to 91% by year 2, also in line with regional and national averages.

Data that is available for 2017/18 year for the TTWA shows that by the end of KS2, 56% of pupils are meeting the required standards in reading, writing and mathematics in Burnley and Pendle. Despite increasing by 11 percentage points since 2016, this is the lowest of Lancashire's six TTWA's and falls well below the Lancashire (63%) and national average (64%). Performance across the two local authorities is similar, at 55% in Burnley and 56% in Pendle.

Key Stage 4 (GCSE)

In terms of measuring performance at KS4 (GCSE), the Department for Education (DfE) implemented a new secondary school accountability system in 2016, using Attainment 8 and Progress 8 measures.

Attainment 8 measures the average achievement of pupils in up to 8 qualifications including English (double weighted if the combined English qualification, or both language and literature are taken), maths (double weighted), three further qualifications that count in the English

Baccalaureate (EBacc) and three further qualifications that can be GCSE qualifications (including EBacc subjects) or any other non-GCSE qualifications on the DfE approved list.

Progress 8 aims to capture the progress a pupil makes from the end of KS2 to the end of KS4. It compares pupils' achievement – their Attainment 8 score – with the average Attainment 8 score of all pupils nationally who had a similar starting point (or 'prior attainment'), calculated using assessment results from the end of primary school. Progress 8 is a relative measure, therefore the national average Progress 8 score for mainstream schools is zero.

Across Burnley and Pendle, the results for the 2017/18 year show:

- The **average Attainment 8 score** was 41.9, falling by 2.8 points since 2015/16, below the average of 45.8 in Lancashire and 43.7 nationally (excluding London). This is the lowest average score across the Lancashire TTWA's despite all areas witnessing a decline. Performance across the two local authorities differed slightly, with scores of 40.0 (-5.0) in Burnley and 43.7 (-0.8) in Pendle.
- On average, pupils make less progress from the end of KS2 to the end of KS4 than across Lancashire and nationally (excluding London), and performance has declined since 2015/16. **The average Progress 8 score** in Burnley and Pendle is -0.18 (compared to -0.12 for Lancashire and -0.06 for England minus London) falling by 0.02 since 2015/16. This is the fifth weakest progress score of the six Lancashire TTWA's, with only pupils in Blackpool, Fylde and Wyre making less progress between KS2 and KS4. Progress is strongest in Pendle (-0.07, ahead of the Lancashire average), compared to average progress scores of -0.29 in Burnley which fell by 0.05 points.
- Just over one-tenth (11%) of students **achieve the English Baccalaureate** (a set of subjects at GCSE including English and maths, a science, a language, and geography or history), falling by four percentage points since 2015/16 and below the Lancashire average (13%), and the average nationally (excluding London

14%). Both of the local authority areas are below the Lancashire average, (both 11%).

Upon completion of KS4 in 2016/17, 92% (+2 percentage points since 2014/15) of leavers remain in sustained education and/or an employment / training destination. This is the lowest proportion across all of the Lancashire TTWA's and falls below the Lancashire and national average (95%). There are, however, variances by local area with the proportion in sustained education and/or an employment / training destination ranging standing at 90% (+2 percentage points) in Burnley and 93% (+1 percentage points) in Pendle.

Young People aged 16-19

Between aged 16 and 19, attainment at Level 2 / KS4 (equivalent to GCSE) and Level 3 / KS5 (equivalent to A Levels) is measured.

Across Burnley and Pendle in 2017/18, by the age of 19:

- 72% (-10 percentage points since 2015/16) have **achieved Level 2** and 64% have **achieved Level 2 with English and maths**, these figures are significantly below the Lancashire (82% and 72%) and national averages (79% and 70%). The better performance is in Pendle (72% and 67%), whilst Burnley sits well below Lancashire and national standards (71% and 61%) each with the proportion achieving Level 2 falling by ten percentage points.
- 50% have **achieved Level 3**, again below the Lancashire (59%) and national averages (56%). As with Level 2, the best performance is in Pendle (54%), which saw a decline of three percentage points since 2015/16, whereas Burnley is significantly below wider comparators (46%) but increased by three percentage points.

Latest available data for 2016/17 shows, upon completion of KS5, 82% of leavers enter sustained education or employment – equal fourth of Lancashire's TTWA's with Preston, Chorley and South Ribble – and is below the Lancashire and national averages (83% each). The proportion is higher in Pendle (82%) compared to Burnley (80%) which saw a decline of ten percentage points since 2014/15.

The split between education (62%) and employment (20%) is largely in line with the split across Lancashire and national profile where a higher. A larger proportion of leavers enter sustained education in Pendle (62%) than Burnley (61%) which saw a decline of 11 percentage points since 2014/15.

The large majority of those entering sustained education go to HEIs (within and outside Lancashire), while approximately just over one-eighth attend Further Education (FE) institutions. Nationally the proportion of students that attend further education colleges is in line with Burnley and Pendle, although higher education remains the preferred choice (60%). Approximately 8% of students start an apprenticeship upon completion of KS5, slightly below the Lancashire (9%) average and above the national average (7%).

Further Education and Apprenticeship Provision in Burnley and Pendle Based Providers

This section considers provision being delivered by providers based in the Burnley and Pendle TTWA (a provider perspective) before the patterns of residents of the TTWA area are explored in the section that follows (learner perspective).

Further Education[^]

The latest 2018/19 data for Further Education (FE) providers based in the Burnley and Pendle TTWA shows there were a total of 22,930 students participating (defined as all learners who are starting, continuing or achieving within the year) in FE courses delivered within the TTWA – equal to over one-quarter (26%) of FE participation across Lancashire*. Burnley and Pendle is ranked first out of Lancashire's TTWAs on a measure of participation.

Sources: Department for Education Attainment/Progress Data by age 19 and by disadvantaged pupils, 2017/18; Percentages of overall pupil destinations after completing key stage 4 / key stage 5 2014/15 - 2016/17 destinations for the 2013/14 cohort DfE FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19

[^] FE figures on this page relate to participation – a count of the number of people starting, continuing and achieving in FE in that year.

* West Lancashire College data is not captured in Lancashire wide figures due to inclusion in Newcastle College Group wide returns.

[§] Due to data limitations, the analysis of the level of provision and learner characteristics relates to FE provision that is ESFA-funded and captured in Individualised Learner Record returns only.

This excludes an element of school sixth form provision which accounts for 196 learners.

General FE College(s) account for the significant majority (98.7%) of FE participants registered with providers based in the TTWA, equal to just over 22,600 students in 2018/19. This proportion is some 34.7 percentage points below the Lancashire average (64%) and considerably higher than regional (52%) and national levels (51%). The remaining students participate in FE in Schools (KS5 pupils in Years 12 to 14) (0.9%); and Private Sector Funded institutions (0.5%), which are both less than the Lancashire average (7% and 13% respectively).

Where data is available, the age profile of students studying at TTWA based FE providers older than the Lancashire and national profile[§]. Just over two-thirds (68%) of students were over the age of 19, higher than Lancashire (47%) and national levels (51%). Ethnic minority groups (accounting for 19% of participants) are also slightly over-represented in the TTWA's provider organisations relative to the Lancashire and national levels (both 18%)[§].

Apprenticeships

Based on the latest 2018/19 data, there were approximately 4,460 apprentices participating (starting, carrying out or achieving) in apprenticeships with Burnley and Pendle based providers (see the definition on page 36). This is the fourth highest level of provision recorded in a TTWA, behind Preston, Chorley and South Ribble; Blackpool, Fylde and Wyre; and Blackburn with Darwen, Hyndburn, Rossendale and Ribble Valley.

There are three main levels of apprenticeships:

- **Intermediate apprenticeship:** This is classed as Level 2 and equivalent to 5 good GCSEs.
- **Advanced apprenticeship:** This is classed as Level 3 and equivalent to 2 A-Levels.
- **Higher apprenticeship:** This can cover level 4, 5, 6 and 7 and is equivalent to foundation degrees and above.

In 2018/19, there were more apprentices in Burnley and Pendle based providers participating in lower level apprenticeships than local geographical comparators. Two-fifths (37%) of apprentices in the TTWA were participating in intermediate level apprenticeships, equal to 1,630 apprentices. This is one percentage point higher than the Lancashire and regional averages (36% each) but one percentage point lower than national levels (38%).

The remaining three-fifths (63%) of provision was offered through advanced (52%) or higher (11%) level apprenticeship courses. This proportion is lower than LEP (64%), regional (64%) levels, but higher than national averages excluding London (62%). The difference is most evident in the proportion of apprentices undertaking higher level apprenticeships, being four percentage points less than Lancashire and national levels (15%) and five percentage points less than regional levels (16%).

Subject coverage of apprenticeships offered by Burnley and Pendle based providers is fairly consistent with Lancashire trends, but varies from regional and national profiles in 2018/19. Differences include:

- Over one-quarter (29%) of apprentices at providers in the TTWA participate in **Engineering and Manufacturing Technologies**, equal to just over 1,300 learners. This is higher than the Lancashire LEP profile (20%), regional (19%) and national levels excluding London (21%).
- There are less apprentices participating in **Business Administration and Law** (25%); compared to Lancashire (26%), regional (29%) and national levels (27%).
- There are less apprentices participating in **Health, Public Services and Care** (20%); compared to Lancashire (26%), regional (25%) and national excluding London levels (24%).
- **Retail and Commercial Enterprise** (9%) participation in the TTWA is in less than Lancashire (10%), regional (11%), and national levels (12%).

Sources: DfE FE Skills Data: Participation by Provider by Funding Stream, Learner and Learning Characteristics 2018/19; DfE Apprenticeship participation/achievements by sector subject area, provider, framework/standard, local authority district: 2014/15 to 2018/19; School, Pupils, and their Characteristics, January 2019

* West Lancashire College data is not captured in Lancashire wide figures due to inclusion in Newcastle College Group wide returns.

^ All figures in this section relate to participation – a count of the number of people starting, continuing and achieving in that year

§ This figure is skewed by Nelson and Colne College reporting 81% of learners over the age of 25, reflecting strong adult learning provision.

Burnley and Pendle Residents Undertaking FE and Apprenticeships

This section considers FE and apprenticeships being undertaken by people who live in the TTWA, based on the home postcode of learners. Not all learners will undertake courses in the TTWA they live in meaning that there are variations between the figures reported from a provider and learner perspective.

Further Education^

In 2018/19, 14,490 students participating in FE were residing in Burnley and Pendle. This is the fourth highest number of resident learners across Lancashire's Travel to Work Areas (TTWAs) behind Preston, Chorley and South Ribble; Blackburn with Darwen, Hyndburn, Rossendale and Ribble Valley; and Blackpool, Fylde and Wyre.

The provision being undertaken by Burnley and Pendle residents split by level shows a lower proportion are studying at Level 4 (2%) than Lancashire (3%) and national levels (5%). Likewise, there is a smaller proportion of learner aims at Level 3 (19%) and Full Level 3 (15%) than the Lancashire profile (21% and 17% respectively) whilst remaining above national excluding London levels (15% and 13% respectively).

The age profile of Burnley and Pendle resident FE learners is somewhat consistent when compared to Lancashire, regional and national profiles. Learners across the TTWA are however slightly less commonly aged 16 to 18, accounting for three out of ten (30%) FE participants, compared to 32% across Lancashire and nationally, excluding London (31%).

Consideration of the FE participation statistics for TTWA residents relative to those for TTWA based local providers suggest that a significant number of learners travel into Burnley and Pendle from outside the TTWA to access FE provision.

Apprenticeships

Based on the latest learner data for 2018/19, Burnley and Pendle residents accounted for approximately 1,550 apprenticeship starts (note that the apprenticeship data for Lancashire residents reports on starts rather than participation, comparison between provider and learner statistics is therefore not possible). This is the fourth highest figure recorded across Lancashire's TTWAs.

The age profile of Burnley and Pendle resident apprentices in 2018/19 shows:

- There was a higher proportion of apprentices under the age of 19 (30%), two percentage points higher than the Lancashire LEP average (28%), and four percentage points higher than regional and national levels (26% each).
- The proportion of apprentice starts over the age of 25 (42%) was lower than in each of the comparator areas.

Approximately two-thirds (65%) of apprenticeship starts by Burnley and Pendle residents were at an advanced or higher level. This is one percentage point more than across Lancashire and the North West (64% each) and two percentage points more than across England minus London (63%).

The profile of subjects studied by residents of the TTWA is broadly consistent with the wider Lancashire profile. Differences include:

- A higher proportion of starts in **Engineering and Manufacturing Technologies** (18%) compared to Lancashire, the North West and nationally (each 15%).
- A higher proportion of starts in **Leisure, Travel and Tourism** (3%) compared to all other geographies (2% each).
- A lower proportion of starts in **Health, Public Services and Care** (26%) compared to Lancashire and the North West (27% each) but higher than nationally (25%).
- A lower proportion of starts in **Business, Administration and Law** (27%) compared to Lancashire (30%), the North West (31%) and nationally (30%).

Higher Education in Lancashire

Overall, there are 56,460 students studying at 16 different Higher Education (HE) providers in Lancashire, an increase of 5.1% since the previous Toolkit report was produced. The large majority (87%) are based at the four Higher Education Institutions (HEI) – Lancaster University, the University of Central Lancashire (which has its main campus based in Preston), University of Cumbria and Edge Hill University. A further 13% are based in FE colleges across the LEP.

Compared to the North West region (93%), there is a smaller proportion of students studying at HEIs, while the proportion of students studying at FE colleges in Lancashire is higher than the wider North West region (13% compared to 7%).

The large majority of HE students in Lancashire are from the UK, accounting for some 87% of students and higher than the regional (83%) and national (80%) averages. In contrast, there is a smaller proportion of non-EU students studying at HEI in Lancashire (9%) compared to the North West (13%) and England (14%).

The HEI and FE colleges have a strong regional draw. Approximately three quarters of students at Lancashire's HEI are from the North West. Overall, four out of ten students residing in Lancashire choose to stay and study in Lancashire for HE. Other Local Enterprise Partnership areas from which students are attracted include Greater Manchester, Liverpool City Region, Cheshire and Warrington and Cumbria. International students account for between 13% (at HEI's) of HE students in Lancashire, below the national average (20%).

Across Lancashire there are a wide range of subjects available to students, covering all sectors and priority sectors. Across HEI in Lancashire, the most popular courses are Subjects Allied to Medicine (accounting for 20% of students), followed by Business and Admin Studies (12%), Biological Sciences, Social Studies, and Education (10% each). Compared to regional and national proportions, key differences are:

- A much higher proportion of students studying Subjects Allied to Medicine in Lancashire (20% compared to 15% regionally and 12% nationally).
- A higher proportion of students studying Education in Lancashire (10% compared to 7% regionally and 6% nationally).
- A lower proportion of students studying Engineering and Technology (3% compared to 7% regionally and nationally).

Higher Education Destinations

Following changes to the availability of graduate destination data following the closure of Higher Education Funding Council for England (HEFCE), data on graduate destinations is available for graduates who studied in Lancashire's HEIs, from the Higher Education Statistics Authority (HESA). This shows that almost one third of leavers from Lancashire's HEIs entering employment did so in Lancashire, and a further 41% in the North West.

Office for National Statistics (ONS) Longitudinal Education Outcomes data reveals that one year after graduation 69% of leavers from Lancashire's HEIs are in sustained employment, whilst 20% enter sustained education. In comparison, in the North West 66% entered employment and 22% further study. After five years, the proportion of leavers recorded as in further study, sustained employment or both is 87% compared to 86% across the North West.

Appendix: Sectors, Occupations and Educational Routes

The table below shows (in broad terms) the relationship between sectors (including Lancashire’s priority sectors), occupations and the emerging Technical Education Routes which will provide a pathway into many skilled occupations in future. There is a large degree of overlap between occupations and sectors, with many occupations found across a large number of sectors, e.g. management roles, administrative occupations and support roles such as IT, human resources, etc. The allocation of a Technical Education route to a specific sector therefore is somewhat simplistic – many routes will be relevant to a number of sectors.

It is also important to note that many occupations require similar underlying skills and qualifications, including numeracy, literacy and IT skills. Technical education is only one route into employment – many people will progress into Higher Education, where the link between subject studied and occupation subsequently taken up can be less direct.

Sectors, Occupations and Education Routeways			
Sector	Relationship to Lancashire’s Priority Sectors	Occupations*	Technical Education Routes**
Agriculture, Forestry and Fishing	n/a	Vast majority of jobs are in Skilled Trades and Elementary Occupations, e.g. farmers, groundsmen, farm workers etc., plus a small number of higher level occupations e.g. managers, veterinarians, environmental professionals.	Agriculture, Environmental and Animal Care
Mining and Quarrying	Some elements are part of Energy and Environmental Technologies	One-third work in higher level occupations, including engineers, production managers, health and safety officers etc. 20% are Process, Plant and Machine Operatives, e.g. plant workers. Relatively high proportion of Administrative and Secretarial Occupations.	Construction Engineering and Manufacturing
Electricity, Gas, Steam and Air Conditioning Supply	Energy and Environmental Technologies		
Water Supply, Sewerage, Waste Management and Remediation	Some elements are part of Energy and Environmental Technologies		

Sectors, Occupations and Educational Routes

Manufacturing	<p>Some elements are part of Advanced Manufacturing</p> <p>Some elements are part of Energy and Environmental Technologies</p> <p>Some elements are part of Creative and Digital Industries</p>	<p>30% of workers are in Professional or Technical Roles, e.g. production managers, engineers.</p> <p>One quarter are in Skilled Trades (e.g. welding, machining etc.).</p> <p>20% are in less skilled processing and packing roles.</p>	Engineering and Manufacturing
Construction	<p>Construction</p> <p>Some elements are part of Energy and Environmental Technologies</p>	<p>Over half of workers are in Skilled Trades jobs such as bricklayers, plumbers, carpenters etc.</p> <p>1 in 10 are in Professional Occupations, including engineers, surveyors etc.</p>	Construction
Wholesale and Retail, Repair of Motor Vehicles	n/a	As well as Sales and Customer Service jobs, people work as managers, in finance roles, and as cleaners and security staff.	Sales, Marketing and Procurement
Transportation and Storage	Some elements are part of Visitor Economy	One third work in Plant and Machine Operative Roles, including bus, train, van, truck and taxi drivers.	Transport and Logistics
Accommodation and Food Service Activities	Visitor Economy	Jobs include chefs, kitchen and catering assistants, waiters and waitresses, bar staff and cleaners. Some people work as managers, but there are very few professional roles in this sector.	Catering and Hospitality
Information and Communication	<p>Some elements are part of Creative and Digital Industries</p> <p>Some elements are part of Finance and Professional Services</p>	<p>A large proportion of workers are in Elementary Occupations – largely postal workers.</p> <p>Professional and Associate Professional Occupations include IT professionals and IT technician roles.</p>	Digital

Sectors, Occupations and Educational Routes

Financial and Insurance Activities	Part of Finance and Professional Services	<p>44% of roles are in Professional and Associate Professional Occupations, including legal roles such as solicitors and barristers, accountancy, advertising etc.</p> <p>13% work as Managers and Senior Officials.</p> <p>1 in 5 work in Administrative and Secretarial Roles, including as finance clerks.</p>	Legal, financial and Legal, Financial and Accounting
Real Estate Activities	Part of Finance and Professional Services		Legal, Financial and Accounting
Professional, Scientific and Technical Activities	<p>Some elements are part of Finance and Professional Services</p> <p>Some elements are part of Advanced Manufacturing</p> <p>Some elements are part of Energy and Environmental Technologies</p> <p>Some elements are part of Creative and Digital Industries</p>		Legal, Financial and Accounting
Administrative and Support Service Activities	<p>Some elements are part of Finance and Professional Services</p> <p>Some elements are part of Visitor Economy</p>		Business and Administration
Public Administration and Defence	n/a		Business and Administration Protective Services
Education	Some elements are part of Creative and Digital Industries		Education and Childcare
Human Health and Social Work Activities	Health and Social Care		Health and Science Care Services

Arts, Entertainment and Recreation	Parts included in Visitor Economy; Parts included in Creative and Digital	Relatively few people are employed in Professional Roles. One-third of people work in Caring, Leisure and Other Service Occupations, such as hairdressing and beauty therapy.	Creative and Design
Other Service Activities	n/a	Associate Professional Occupations include artistic occupations such as artists, authors, actors, dancers, musicians, photographers.	Hair and Beauty

Source: Business Register and Employment Survey, 2018; Annual Population Survey 2017/18

* Occupations data based on broad sector definitions and applied to SIC sections.

** Technical education routes will prepare people for occupations which may be found within a number of sectors.

n/a/ Not related to priority sectors