North East Lincolnshire

Economic Baseline

North East Lincolnshire Council

July 2014

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Table of contents

Chapter Pages

[Summary 4](#_Toc394327682)

[1. Introduction 6](#_Toc394327683)

[2. Demographics 7](#_Toc394327684)

[2.1. Age, sex and ethnicity 7](#_Toc394327685)

[3. Economic Geography 10](#_Toc394327686)

[3.1. Transport 10](#_Toc394327687)

[3.2. Travel to Work Patterns 10](#_Toc394327688)

[3.3. Housing Market Areas 12](#_Toc394327689)

[3.4. Functional Economic Geography 13](#_Toc394327690)

[4. Business and Enterprise 14](#_Toc394327691)

[4.1. Business Density 14](#_Toc394327692)

[4.2. Employment 17](#_Toc394327693)

[4.3. Occupational Profile 20](#_Toc394327694)

[4.4. Earnings 20](#_Toc394327695)

[5. Economic Output & Productivity 23](#_Toc394327696)

[5.1. Export Performance 26](#_Toc394327697)

[6. Innovation 28](#_Toc394327698)

[7. Qualifications & Skills 29](#_Toc394327699)

[7.1. Apprenticeships 30](#_Toc394327700)

[7.2. Skills Gaps and Shortages 30](#_Toc394327701)

[8. Housing Market 33](#_Toc394327702)

[9. Labour Market 36](#_Toc394327703)

[9.1. Unemployment 37](#_Toc394327704)

[9.2. Claimant count 38](#_Toc394327705)

[9.3. Youth Unemployment 41](#_Toc394327706)

[9.4. Self Employment 42](#_Toc394327707)

[10. Deprivation 44](#_Toc394327709)

[10.1. Health 44](#_Toc394327710)

# Summary

This document provides a baseline assessment of socio-economic conditions in North East Lincolnshire benchmarked against surrounding local authority areas and national averages. Its purpose is provide an overview of ‘the state of the economy’ and seeks to provide a component of the evidence base required to inform the development of the forthcoming Local Plan and related economic development strategies. In addition to this baseline analysis, the Council commissioned Atkins to produce three inter-related strands of assessment, namely; a key sectors study, economic futures report and employment land review study.

A summary of the key findings is provided below.

**North** **East Lincolnshire has a resident population of approximately 160,000** and has experienced only marginal rates of growth over recent years. **It** **is characterised as having an ageing workforce and a relatively low economically active population**. A significant proportion of economically inactive residents in North East Lincolnshire are categorised as long term or temporarily sick or as looking after family members on a full time based.

**ONS project that the Borough will see a decline in its working age population by nearly -5,000 in the period up to 2021**. This projection reflects structural demographic changes as well as historical trends of relatively high out-migration of economically active residents to other areas.

**The low rate of economic activity in North East Lincolnshire is accompanied by a relatively high incidence of unemployment**. At the time of writing, unemployment in the Borough stood at 10.4% compared to the national average of 6.4%. **Underlying this are structural challenges with North East Lincolnshire being particularly characterised by unemployment being persistently high amongst the young (aged 16-24) and those that are long-term unemployed.** The gap between unemployment and economic inactivity in North East Lincolnshire and the national averages is growing.

**At least 7% of North East Lincolnshire residents aged 16-18 are classified as NEETs (Not in employment, education or training).**

**North East Lincolnshire is the 46th most deprived local authority in England with significant concentrations evident in a range of neighbourhoods distributed across the Borough**.

With a high proportion of terraced housing, the North East Lincolnshire housing market is considered affordable but house building rates have been sluggish.

**The economy of North East Lincolnshire displays a high rate of self-containment**. Indeed, over 80% of those working in the area also live in the area. Similarly, 86% of the Borough’s working residents work in the area.

According to the categorisation utilised by DEFRA, **North East Lincolnshire is a predominantly urban local authority (88%).** This is significantly more urban that surrounding local authorities which are much more rural in nature. **The Borough’s urban characteristics reflect the area’s important economic role**.

**North** **East Lincolnshire has a strong representation of businesses and employment in key sectors including manufacturing, transport and logistics, food, construction and wholesale**. These are vital to the ongoing and growing economic health of the area and include activities which offer substantial economic growth opportunities such as renewable energy, ports and transport and viable manufacturing operations. The importance of North East Lincolnshire’s industrial clusters is reflected by the area having a relatively high business density. **Conversely, the area is under-represented by higher value service activities including information and communications technology (ICT) and financial and business services**.

**In terms of enterprise, North East Lincolnshire is characterised by having a relatively low proportion of micro-sized businesses (less than 10 employees)**. Similarly, rates of self-employment are low in the Borough. These trends highlight the importance of targeted business support programmes including improved access to finance. Despite the low representation of micro businesses, the Borough has relatively high rates of new business births. The challenge comes however with business death rates being equally high and survival rates being poor. Indeed, **only 30% of new business start ups in North East Lincolnshire survive for 3 years or more.**

**Compared to its neighbours, North East Lincolnshire performs relatively strongly in terms of economic output (GVA which reflects the concentration of industrial activity in the area. However, despite good headline GVA performance, this masks the fact the output per worker (productivity) is relatively low**. In 1998, GVA per head was roughly similar to the national average but now is only around 85%. This productivity gap is indicative of the Borough’s low wage economy at least when compared to the national average.

**Reinforcing the earnings and productivity gaps evident in North East Lincolnshire, the area has a skills profile which is over-represented by those with no qualifications and under-represented by those with an education to Level 4 and above**. Whilst the proportion of local residents with no qualifications has declined by 3% and those with Level 4+ qualifications have increased by 20% since 2001, these improvements have been at rates below the national averages.

# Introduction

North East Lincolnshire Council (NELC) is seeking to establish a better understanding of the opportunities for growth to enable it to articulate and drive forward sustainable economic growth in the Borough. This will be progressed through the preparation of a new Local Plan, which will identify the requirement for the allocation of suitable land for commercial and industrial development for the period up to 2032. Based on a sound evidence base, key allocations may also be made to attract inward investment in accordance with policy priorities established by NELC and in the Strategic Economic Plans prepared by Humber and Lincolnshire LEPs. In doing so, it will seek to ensure that the Council can maximise the opportunities for regeneration and sustainable economic growth.

As part of the development of the Local Plan, robust economic evidence is needed. In addition to this economic baseline, the Council commissioned Atkins to produce a key sectors, economic futures and employment land review assessment. The issues identified in this document are supplemented by this work so that a complete picture of the current position and future opportunities is fully identified.

The purpose of this document is to provide a baseline analysis of the North East Lincolnshire economy. It sets out the current understanding of key socio-economic themes. The analysis contained in this document provides a robust evidence base to underpin the Local Plan and future economic development work in North East Lincolnshire and the wider Local Enterprise Partnerships (LEPs) areas; the Humber LEP and Greater Lincolnshire LEP.

The document is structured into nine sections:

* Section 2: Demographics – outlines the demographic profile of North East Lincolnshire including age, gender and ethnicity.
* Section 3: Economic Geography – provides an outline of North East Lincolnshire’s economic geography, the transport infrastructure and the economic and labour market linkages the local area has with areas beyond the administrative boundary.
* Section 4: Business and Enterprise – looks at the structure and competitiveness of the local economy including the sectoral profile, business density and employment.
* Section 5: Productivity – explores the Gross Value Added (GVA) output from North East Lincolnshire and the level of exporting.
* Section 6: Innovation – assesses measures of the knowledge economy and patent output.
* Section 7: Qualifications & Skills – explores the level of qualifications, skills gaps and shortages within North East Lincolnshire.
* Section 8: Housing – Outlines North East Lincolnshire’s housing stock, house building, projections, tenure and house prices.
* Section 9: Labour Market – provides an assessment of unemployment, youth unemployment and rates of self employment in the local labour market.
* Section 10: Deprivation – investigates wider social deprivation issues connected to health.

# Demographics

The population of North East Lincolnshire, as estimated by ONS mid-year population estimates, amounted to 159,800 in 2013. As can be seen from Table 2‑1, North East Lincolnshire has a mid-size population for compared to surrounding areas. Similar to its neighbouring authorities, the population has exhibited low rates of growth over recent years, with an annual growth rate (0.12%) in the period between 2008 and 2013.

Table 2‑1 Population by local authority area (2008-2013)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Area | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Annual Growth Rate |
| East Riding of Yorkshire | 332,500 | 332,700 | 333,600 | 334,700 | 335,900 | 336,000 | 0.17% |
| Kingston upon Hull, City of | 256,700 | 256,100 | 256,200 | 256,100 | 257,200 | 257,600 | 0.06% |
| North East Lincolnshire | 158,700 | 158,700 | 159,000 | 159,700 | 159,700 | 159,800 | 0.12% |
| North Lincolnshire | 164,500 | 165,600 | 166,500 | 167,500 | 168,400 | 168,800 | 0.43% |
| Greater Lincolnshire LEP | 1,024,000 | 1,029,900 | 1,037,300 | 1,042,000 | 1,046,900 | 1,053,000 | 0.47% |
| Humber LEP | 912,400 | 913,100 | 915,300 | 918,000 | 921,200 | 922,200 | 0.18% |

Source: ONS MYPE 2013

## Age, sex and ethnicity

The age profile of North East Lincolnshire is becoming increasingly skewed towards older age groups, as demonstrated by the comparison between 2001 and 2011 in Figure 2-1. This is part of a national aging phenomenon, though Figure 2-2 demonstrates that North East Lincolnshire has a slightly older age profile compared to the national average.

Figure - Age Structure in North East Lincolnshire (2001-2011)

Source: Census 2001; Census 2011.

Figure - Age structure in North East Lincolnshire and England, 2011

Source: Census 2011

The aging population results in a proportionately smaller active workforce, as demonstrated by the increase in old age dependency ratios (the number of people aged over 64 per 100 of the working age population) both in North East Lincolnshire and nationally (Table 2-2). However, Figure 2-1 also shows that the proportion of the population aged 20-29 has actually increased since 2001, suggesting the area has improved its ability to attract or retain younger members of the population. Table 2-2 shows that while neighbouring North Lincolnshire has experienced a similar increase in the old age dependency ratio to North East Lincolnshire, Kingston upon Hull has experienced a moderate decrease in dependency.

Table - Old-age dependency ratios (2003 and 2013)

|  |  |  |
| --- | --- | --- |
| Area | 2003 Dependency Ratios (%) | 2013 Dependency Ratios (%) |
| North East Lincolnshire | 16.8 | 18.8 |
| North Lincolnshire | 17.0 | 19.3 |
| Kingston upon Hull | 14.8 | 14.6 |
| England | 15.9 | 17.3 |

Source: ONS Mid-Year Population Estimates 2013

The population of North East Lincolnshire is expected to continue to age, in particular due to loss of individuals in the 16-24 age group (see Figure 2-3). This will result in a loss of 4,600 individuals of working age by 2021 which reflects trend-based factors of demographic change and relatively high levels of out-migration.

Figure - Projected change in the age profile of the population (2011-2021)

Source: ONS Sub-national Population Projections 2011

Table 2-3 provides statistics on the demographic characteristics of the North East Lincolnshire population (aged 16 and over). It demonstrates that the adult population has in fact slightly shrunk since 2007, and that the decrease in the female population exceeds that of the male population. As the male unemployment rate is higher than the female rate (see section 9), this suggests the total rate of unemployment may rise if the trend in out-migration continues.

Table - Demographic characteristics of the adult population (2007-2013)

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2007 | 2010 | 2013 |
| **Gender** | | | |
| Male | 62,000 | 61,400 | 61,500 |
| Female | 65,900 | 63,500 | 64,600 |
| **Ethnicity** | | | |
| White | 125,100 | 122,900 | 124,500 |
| Black & Minority Ethnic | 2,800 | 2,100 | 1,700 |
| **Disability** | | | |
| Both DDA & work-limiting | 14,300 | 11,100 | 14,900 |
| DDA only disabled | 5,600 | 4,600 | 11,100 |
| Work-limiting only disabled | 4,200 | 3.,400 | 3,400 |
| Not disabled | 76,700 | 79,200 | 96,800 |
| **Total (16+)** | **127,900** | **125,000** | **126,100** |

Source: Annual Population Survey 2013

# Economic Geography

## Transport

North East Lincolnshire is accessible by road by the M180/A180 to the west, the A46 from Lincoln to the south-west, and the A18 and A16 from the south. A rail line terminates at Cleethorpes with stations at Grimsby Town and Grimsby Docks, running to Manchester, Doncaster, Newark, Barton-on-Humber and Scunthorpe. Humberside Airport is located nearby in neighbouring North Lincolnshire, with destinations across Europe. Table 3‑1 reviews the local transport connections and highlights key geographical linkages.

Table 3‑1: Transport Connections

|  |  |
| --- | --- |
| Geography | Connection |
| Neighbouring Authorities: | * Road Direct - A180 - Scunthorpe * Road Direct - A16 - Skegness & Boston * A15 - Hull * Rail - Barton-on-Humber * Rail – Scunthorpe |
| Yorkshire & Humber and Lincolnshire | * Rail – Doncaster (&Rest of Yorkshire) * Rail – Newark (& Rest of Lincolnshire) * Road Direct - A46 - Lincoln |
| Rest of the United Kingdom | * Road indirect – England & Scotland A1/M1/M180/M18/M62 * Rail – Manchester (and rest of North West) * Air - Aberdeen |
| Europe | * Air - Amsterdam * Air - North Sea * Air - Turkey, Italy. * Ship – UK, Europe and World |

## Travel to Work Patterns

Table 3-2 and Table 3-3 summarise travel to work patterns within North East Lincolnshire and surrounding centres. The tables demonstrate that the Borough exhibits a high degree of self-containment with 86% of employed residents working within the administrative area of North East Lincolnshire. Similarly, over 80% of those who work in the Borough also live there. Of those who do commute outside largely NEL, most travel to other locations in Lincolnshire or within Yorkshire and Humber. Similarly, few workers commute into the area and those that do largely come from elsewhere in Lincolnshire or Yorkshire & Humber. Should North East Lincolnshire and the LEPs be successful in generating significant economic and employment growth in the area, it is likely that the residential influence of the Borough would spread outwards as workers would seek a greater choice of residential options.

Table - Residence of workforce in North East Lincolnshire (2011)

|  |  |
| --- | --- |
| Place of residence | Percentage of total workforce (%) |
| North East Lincolnshire | 80.5 |
| East Lindsey | 5.6 |
| North Lincolnshire | 5.2 |
| West Lindsey | 2.7 |
| East Riding of Yorkshire | 2.0 |
| Kingston upon Hull, city of | 1.5 |
| Sevenoaks | 0.7 |
| North Kesteven | 0.5 |
| Bassetlaw | 0.5 |

Source: Annual Population Survey 2013

Table - Workplace of residents in North East Lincolnshire (2011)

|  |  |
| --- | --- |
| Place of work | % of residents |
| North East Lincolnshire | 86.1 |
| North Lincolnshire | 4.5 |
| East Lindsey | 1.5 |
| Lincoln | 1.2 |
| West Lindsey | 1.1 |
| Kingston upon Hull, city of | 0.7 |
| Northern Ireland | 0.7 |

Source: Annual Population Survey 2013

Travel to Work Areas (TTWAs) present challenges to planning authorities is they often cut across administrative boundaries. At present, ONS has identified TTWAs based on 2001 Census results although these will be replaced when small area outputs from the 2011 Census become available. Figure 3-1 shows that North East Lincolnshire and large areas of nearby North Lincolnshire, East Lindsey and West Lindsay administrative area are included in the Grimsby 2001 TTWA. However, nearby urban areas such as Brigg (within Scunthorpe’s TTWA) and Louth (within Louth & Horncastle’s TTWA) are not included in the Grimsby TTWA. This illustrates the draw to other centres within the wider area.

Figure - 2001 TTWA Boundaries



Source: ONS 2009

### Rural/Urban Balance

The towns of Grimsby and Cleethorpes are the principal centres of population in the Borough. North East Lincolnshire is categorised as 88% urban under DEFRA definition of rural and urban areas (Table 3-4). Nearby North Lincolnshire is more rural with a 48.7% of the population identified as living in an urban area. Nearby West Lindsey and East Lindsey are classified as mainly rural with 99-100% of the population living in rural areas. These differing balances between urban and rural use clearly reflect the varying economic roles of authorities in the area.

Table - Rural and urban populations (2009)

|  |  |  |  |
| --- | --- | --- | --- |
| LA | Population | Rural Population (including market Towns) | Rural % |
| East Lindsey | 130,413 | 130,413 | 100 |
| East Riding of Yorkshire | 314,169 | 222,643 | 70.8 |
| Kingston upon Hull City of | 243,753 | - | 0.0 |
| North East Lincolnshire | 157,711 | 19,132 | 12.1 |
| North Lincolnshire | 152,778 | 80,031 | 52.3 |
| West Lindsey | 79,487 | 79,303 | 99.7 |
|  |  |  |  |
| England | 49,142,130 | 13,225,672 | 26.9 |

Source: DEFRA Rural/Urban Local Authority Classification, 2009

## Housing Market Areas

The 2013 *Strategic Housing Market Assessment* (SHMA) explores a range of housing market geographies. The SHMA provides a more localised analysis of spatial zones within and outside North East Lincolnshire which demonstrate strong interactions between the economic and residential functions across North East Lincolnshire, North Lincolnshire, East Lindsey and West Lindsey. The SHMA identifies one single housing market area for North East Lincolnshire; categorised into four spatial zones:

* Urban area – this comprises Grimsby and Cleethorpes, and is identified as the focus for further housing development.
* Estuary zone – This constitutes the port town of Immingham and the area between Immingham and Grimsby, along the Humber estuary.
* Western and southern arc – this area surrounds the urban area to the south and west, and contains several villages
* Rural area – Situated inland from the estuary zone and western and southern arcs, comprising several villages and small settlements.

The four sub-market areas are displayed within Figure 3-2.

Figure - Spatial Zones in the SHMA



Source: GVA and North East Lincolnshire Council 2013

## Functional Economic Geography

The identification of functional economic areas can help define potential markets for future jobs and employment growth which in turn can influence priorities for spatial and development planning. Often the cross-boundary nature of functional economic areas reflects the importance of communication and co-operation between neighbouring local authorities as called for by Government under the ‘duty to co-operate’. Table 3-5 outlines a summary of the main functional economic themes in North East Lincolnshire.

Table - Functional Economic Themes in North East Lincolnshire

|  |  |  |
| --- | --- | --- |
| Theme | Comment | Strategic Fit |
| Transport | Accessibility and connectivity are importance determinants in functional economic geography. | Lincolnshire, the Humber area and east Yorkshire. |
| Rural/Urban | Urban areas and rural areas often have separate economies and requirements. | North Lincolnshire & Hull. |
| Labour markets | Significant degree of interdependence between local authority areas in the Humber area. | Hull, East Riding, North Lincolnshire, East Lindsey and West Lindsey. |
| Housing markets | Clear indication from the 2013 SHMA showing key linkages with North Lincolnshire, East Lindsey and  West Lindsey. | Neighbouring councils. |
| Administrative Boundaries | As a member of the Humber LEP and Greater Lincolnshire LEP there are key economic linkages north and south of the Humber estuary.  Other administrative boundaries include European NUTS[[1]](#footnote-1) and old county boundaries like Humberside. | NUTS III places North Lincolnshire & North East Lincolnshire together.  Humber LEP, Humber & Ports City Region and Humberside: North Lincolnshire, North East Lincolnshire, Kingston upon Hull and East Riding of Yorkshire.  Lincolnshire LEP: County of Lincolnshire. |

The assessment suggests different definitions could be used to describe the functional economic area for North East Lincolnshire. The labour market assessment is the most comprehensive, and demonstrates the relative self-containment of the North East Lincolnshire economy.

# Business and Enterprise

As demonstrated in Table 4-1, North East Lincolnshire has an above average concentration of businesses in manufacturing, construction, motor trades, wholesale and retail, transport and storage, and accommodation and food sectors. This reflects local sectoral strengths in port and logistics operations, renewables and energy, the processing and sale of food (particularly seafood), the visitor economy and chemical & process industries.

The area is relatively under-represented by businesses in sectors including information and communication, financial and insurance, professional, scientific and technical and business administration and support services. These sectors are where the UK Government expects to see significant employment growth nationally over the medium to long term. Economic growth in these sectors is expected to create employment for highly qualified and highly paid individuals, with consequent benefits to the economy’s competitiveness and the prosperity. However, the Government is also pushing for a more balanced economic recovery which includes the ‘reshoring’ of manufacturing, investment in ports and other key infrastructure and significant development of new capacity in renewable energy. These strands of Government economic and energy policy offer substantial opportunities for employment growth, economic diversification and enhanced prosperity for North East Lincolnshire over the next decade and beyond.

Table - Distribution of businesses by sector

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Industry | North East Lincolnshire | North Lincolnshire | Kingston upon Hull, City of | England |
| Agriculture, forestry & fishing | 1.4% | 8.7% | 0.3% | 4.4% |
| Mining, quarrying & utilities | 0.8% | 1.2% | 0.5% | 0.6% |
| Manufacturing | 7.3% | 6.3% | 9.0% | 5.3% |
| Construction | 12.5% | 11.2% | 9.2% | 10.2% |
| Motor trades | 4.5% | 4.6% | 3.6% | 3.0% |
| Wholesale | 5.5% | 4.7% | 5.6% | 4.9% |
| Retail | 16.2% | 11.1% | 15.0% | 10.7% |
| Transport & storage | 6.3% | 7.5% | 3.6% | 3.2% |
| Accommodation & food services | 7.1% | 7.4% | 6.8% | 6.2% |
| Information & communication | 2.1% | 2.1% | 2.5% | 7.1% |
| Financial & insurance | 1.8% | 1.7% | 2.3% | 2.6% |
| Property | 2.7% | 2.2% | 3.0% | 3.7% |
| Professional, scientific & technical | 9.6% | 10.1% | 8.1% | 15.3% |
| Business administration & support services | 5.3% | 5.8% | 6.3% | 7.0% |
| Public administration & defence | 0.9% | 1.2% | 4.9% | 0.9% |
| Education | 2.5% | 2.7% | 3.0% | 2.5% |
| Health | 6.5% | 5.0% | 10.6% | 5.7% |
| Arts, entertainment, recreation & other services | 6.7% | 6.5% | 5.8% | 6.8% |

Source: ONS Enterprise Counts

## Business Density

North East Lincolnshire features a relatively high business density when compared to England, as demonstrated by Figure 4-1. This partly reflects the clustering of several key industrial sectors in the area, particularly food processing as well as the largely urban characteristics of the Borough.

Figure - Business density (number of enterprises per 10,000 population aged 16-64, 2013)

Source: Mid Year Population Estimates and ONS Enterprise Counts, 2013.

As demonstrated in Table 4-2, North East Lincolnshire when compared to the national average, has a relatively low proportion of micro-businesses (2-4 employees) and a relatively high proportion of small businesses with 10-24 employees. The under-representation of micro businesses presents both a challenge and an opportunity. Business support efforts should be prioritised for micro and small businesses in order to enhance enterprise and the entrepreneurship culture in North East Lincolnshire. Significant latent economic growth and prosperity could be released as a result of carefully targeted business support initiatives including better access to funding.

Table - Distribution of businesses by size (2013)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Number of employees | North East Lincs. | Kingston upon Hull | East Riding of Yorkshire | North Lincs. | England |
| 2 to 4 | 40% | 40% | 57% | 51% | 52% |
| 5 to 9 | 21% | 23% | 17% | 20% | 22% |
| 10 to 24 | 26% | 23% | 17% | 19% | 15% |
| 25 to 49 | 6% | 8% | 4% | 7% | 6% |
| 50 to 99 | 4% | 3% | 3% | 3% | 3% |
| 100 to 249 | 1% | 2% | 1% | 1% | 2% |
| 250+ | 1% | 1% | \*% | 1% | 1% |

Source: Employer Skills Survey 2013

Figure 4-2 and Figure 4-3 depict trends in business ‘births’ and ‘deaths’ in North East Lincolnshire compared to surrounding areas and the national average between 2006 and 2011. These charts clearly reflect the effect of the economic recession. However, of particular importance is the fact that business births in North East Lincolnshire has been notably higher than surrounding areas and the England average. However, this is also the case for business deaths. These trends, to a degree, contradict the evidence presented above which showed that the area is under-represented in terms of its base of micro-sized businesses. Nevertheless, the implication is that the clustering of key sectors is providing spin-off benefits in terms of new business formation taken place as a result of ongoing investment in renewable energy, food manufacturing, logistics and other industrial projects. This enterprise activity is taking place both directly in core sector operations and along the supply chain.

Figure - Business births as a proportion of active businesses (2004-2012)

Source: ONS Business Demography 2012.

Figure - Business deaths as a proportion of active businesses (2004-2012)

Source: ONS Business Demography 2012

Despite the relatively high rate of new business births, the death rate in the area has been consistently higher than neighbouring areas and the national levels over the past ten years. This reflects the challenges businesses must face to survive in North East Lincolnshire. This gap in death rates has been more pronounced since the recession although is partly offset by higher birth rates compared to other areas. Nonetheless, business survival rates based on the most recent data demonstrate that businesses operating in North East Lincolnshire are currently at a significant disadvantage (Table 4-3).

Table - Survival rates of businesses born in 2007 - 2009 (%)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | 2007 | | 2008 | | 2009 | |
| 1 year | 3 year | 1 year | 3 year | 1 year | 3 year |
| North East Lincolnshire | 76.0 | 48.6 | 46.4 | 29.3 | 44.8 | 29.5 |
| East Riding of Yorkshire | 93.4 | 62.8 | 94.8 | 60.4 | 91.9 | 62.8 |
| Kingston upon Hull | 93.7 | 57.2 | 93.5 | 53.2 | 92.6 | 57.4 |
| North Lincolnshire | 94.6 | 59.7 | 93.6 | 57.3 | 92.1 | 58.4 |

Source: ONS Business Demography 2012

## Employment

Table 4-4 sets out the structure of employment in North East Lincolnshire by broad sector compared to surrounding areas and the national average. Manufacturing, retail, health and education are all significant employment sectors. Compared to the national picture, North East Lincolnshire has a relatively high concentration of employment in the manufacturing, motor trades, retail, transport and storage and health sectors. This in part reflects the significant role of manufacturing across the region, as well as the area’s particular strengths, for example in raw food product handling, transport and storage.

Table - Employment by sector (2011)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Industry | North East Lincs. | Kingston upon Hull, City of | North Lincs. | England |
| 1 : Agriculture, forestry & fishing (A) | 0.1% | 0.0% | 0.3% | 1.4% |
| 2 : Mining, quarrying & utilities (B,D and E) | 1.2% | 0.9% | 2.1% | 1.1% |
| 3 : Manufacturing (C) | 14.6% | 16.2% | 20.2% | 8.4% |
| 4 : Construction (F) | 4.2% | 5.1% | 7.2% | 4.6% |
| 5 : Motor trades (Part G) | 2.2% | 1.7% | 2.2% | 1.8% |
| 6 : Wholesale (Part G) | 3.2% | 4.0% | 3.7% | 4.2% |
| 7 : Retail (Part G) | 11.6% | 11.1% | 9.7% | 10.2% |
| 8 : Transport & storage (inc postal) (H) | 8.8% | 4.1% | 8.3% | 4.6% |
| 9 : Accommodation & food services (I) | 5.6% | 4.1% | 5.3% | 6.8% |
| 10 : Information & communication (J) | 1.1% | 1.7% | 0.7% | 4.0% |
| 11 : Financial & insurance (K) | 1.1% | 0.9% | 1.1% | 3.8% |
| 12 : Property (L) | 1.0% | 1.1% | 0.9% | 1.8% |
| 13 : Professional, scientific & technical (M) | 4.2% | 4.0% | 3.3% | 8.0% |
| 14 : Business administration & support services (N) | 7.6% | 9.2% | 7.4% | 8.3% |
| 15 : Public administration & defence (O) | 3.8% | 6.4% | 4.0% | 4.6% |
| 16 : Education (P) | 9.6% | 9.4% | 7.6% | 9.2% |
| 17 : Health (Q) | 16.1% | 16.6% | 12.6% | 12.7% |
| 18 : Arts, entertainment, recreation & other services (R,S,T and U) | 4.0% | 3.4% | 3.5% | 4.5% |

Source BRES 2011

As was shown earlier in this section for the Borough’s business base, employment is relatively low in the information and communication, financial and insurance and business, scientific and technical sectors. The area has a similar distribution of employment by sector to neighbouring North Lincolnshire, though with a greater proportion of people working in education and health and less in manufacturing. However, given the role of Grimsby and Immingham ports, the Borough has a prominent transport and storage sector.

Analysis of employment change by sector, as presented in Figure 4-4, indicates several key issues:

* The greatest increase in employment over the period 2009-2012 has been in the mining, quarrying and utilities sector, which has grown by around 40%. This most likely reflects the expansion of the renewable energy sector in the area and elsewhere in the Humber estuary.
* Expansion in this sector will have stimulated expansion in the transport, manufacturing, professional, scientific and technical and business administration and support sectors through supply chain activities and other linkages.
* Sectors vulnerable to change in the macro-economic climate have experienced reduced employment. Contraction in the motor trade, property, accommodation and food and construction sectors reflects both reduced business confidence in these sectors and consumer willingness to spend on these goods and services. Additionally, reduced employment in public administration and defence, education and health reflects the effect of on-going cuts in public sector spending.

Figure - Change in employment by sector (2009-2012)

Source: Business Register and Employment Survey 2012. All figures rounded to nearest 100 for data licensing purposes.

Table 4-5 indicates that the sectors with the greatest proportion of job vacancies in North East Lincolnshire include banking, finance and insurance, distribution, hotels and restaurants and public administration, education and health. This pattern has remained largely consistent over time, though vacancies in the public sector have declined, reflecting austerity measures. It is notable that banking, finance and insurance dominates available vacancies yet the financial and insurance sector only represented 1.1% of employment in 2011 (Table 4-5). The large number of vacancies in this sector is likely to be due to difficulties in finding appropriately skilled employees locally.

Table - Distribution of notified vacancies by sector for North East Lincolnshire (%, 2006-2012)

| Sector | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Agriculture and fishing | 0.1 | 0.8 | 0.1 | 0.2 | 0.1 | 0.0 | 0.2 |
| Energy and water | 0.1 | 0.0 | 0.1 | 1.6 | 0.1 | 0.0 | 0.0 |
| Manufacturing | 3.1 | 5.4 | 3.3 | 5.7 | 1.5 | 3.3 | 2.3 |
| Construction | 1.3 | 2.5 | 1.0 | 1.6 | 4.6 | 5.3 | 5.3 |
| Distribution, hotels and restaurants | 14.9 | 17.5 | 11.6 | 13.0 | 14.3 | 6.6 | 16.1 |
| Transport and communications | 2.7 | 1.4 | 2.9 | 1.8 | 1.1 | 0.6 | 3.8 |
| Banking, finance and insurance | 36.2 | 42.0 | 52.7 | 51.0 | 49.2 | 76.6 | 60.9 |
| Public administration, education & health | 38.3 | 25.9 | 25.2 | 21.9 | 26.4 | 6.9 | 10.1 |
| Other services | 3.3 | 4.4 | 3.0 | 3.2 | 2.5 | 0.6 | 1.2 |

Source: Jobcentre Plus Vacancy Statistics 2013

Figure - Employment in North East Lincolnshire and regional growth (2004-2013)

Source: Annual Population Survey 2013

Figure 4-5 presents information on employment by sector in North East Lincolnshire relative to regional patterns of change (Yorkshire & the Humber). The horizontal axis marks average annual employment growth between 2004 and 2013 in Yorkshire & the Humber. The vertical axis marks the strength or concentration of a sector in North East Lincolnshire in relation to Yorkshire & Humber by location quotient (LQ). Where this equals 1, the proportion of employment in the sector is the same across the areas; when it is greater than 1 this represents a greater concentration of employment in this sector in North East Lincolnshire, and vice versa when it is less than 1. The area of the circles reflects that sector’s current share of employment in North East Lincolnshire. For example, manufacturing employs more people than construction. This allows for assessment of sectors by regional growth trends and significance in North East Lincolnshire.

North East Lincolnshire has concentrations of employment in distribution, hotels and restaurants and transport and communications, both of which have seen low but positive growth. Manufacturing, North East Lincolnshire’s most notable specialisation, has experienced clear contraction regionally. North East Lincolnshire currently has a lower proportion of employment in sectors such as banking, finance and insurance and energy and water which have seen high rates of growth. In general, we would hope to see low concentrations of employment in sectors exhibiting contraction, and high concentration in sectors exhibiting growth. However, to some extent the opposite can be observed for North East Lincolnshire.

## Occupational Profile

The occupational profile to a large extent reflects the economic composition of the local economy. For example, a larger share of manufacturing and retail in the economy is likely to be reflected in larger proportions of operatives and sales occupations.

In 2013 just over 25% of North East Lincolnshire’s residents were employed in three upper tier occupational groups including managers, professionals and associate professional (Table 4‑6). This is lower than North Lincolnshire (33.4%) and Hull (30.9%) and significantly less compared to the national average (44.7%).

Table 4‑6 Employment by Occupation (2013)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Occupations | North East Lincolnshire | North Lincolnshire | Kingston upon Hull | England |
| 1: Managers, directors and senior officials | 7.7 | 10.4 | 6.7 | 10.5 |
| 2: Professional occupations | 10.5 | 13.2 | 14.0 | 19.9 |
| 3: Associate prof & tech occupations | 8.0 | 9.8 | 10.2 | 14.3 |
| 4: Administrative and secretarial occupations | 10.8 | 10.4 | 8.9 | 10.7 |
| 5: Skilled trades occupations | 13.5 | 12.9 | 13.1 | 10.4 |
| 6: Caring, leisure and other service occupations | 10.9 | 10.0 | 9.8 | 9.0 |
| 7: Sales and customer service occupations | 8.9 | 6.3 | 11.2 | 7.8 |
| 8: Process, plant and machine operatives | 13.9 | 12.9 | 10.9 | 6.2 |
| 9: Elementary occupations | 14.5 | 13.7 | 14.5 | 10.6 |

Source: ONS Annual Population Survey (2014)

Since 2009 (Table 4-7), the North East Lincolnshire labour market has seen a decline in associate professional & tech occupations (-3.2%). Declines were also observed in North Lincolnshire (-2.4%) and Hull (-0.4%). However, this contrasts with national trends where the proportion has increased. This represents a challenge for the local economy in understanding what is driving this decline and why this has occurred at a greater level in North East Lincolnshire compared to other areas.

Table - Change in occupation profile (2009-2013)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Occupations | North East Lincolnshire | North Lincolnshire | Kingston upon Hull | England |
| 1: Managers, directors and senior officials | 0.9 | 0.5 | 1.5 | 0.3 |
| 2: Professional occupations | 0.9 | 0.1 | 1.4 | 1.3 |
| 3: Associate prof & tech occupations | -3.2 | -2.4 | -0.4 | 0.4 |
| 4: Administrative and secretarial occupations | -0.7 | -0.2 | -1.5 | -1.1 |
| 5: Skilled trades occupations | 0.6 | 2.1 | -1.7 | -0.5 |
| 6: Caring, leisure and other service occupations | 1.3 | 2.2 | -0.4 | 0.3 |
| 7: Sales and customer service occupations | -0.3 | -1.0 | 1.6 | -0.2 |
| 8: Process, plant and machine operatives | -0.2 | -1.3 | 1.3 | -0.4 |
| 9: Elementary occupations | -0.2 | 0.1 | -2.4 | -0.3 |

Source: ONS Annual Population Survey (2014)

## Earnings

Table 4-8 presents annual gross earnings statistics for residents in North East Lincolnshire and surrounding areas. Though higher than Hull, annual earnings are relatively low in comparison to other local areas and to the national average. This is the case for both median and mean measures.

Table - Annual gross earnings of residents (2013)

|  |  |  |
| --- | --- | --- |
| Area | Median | Mean |
| North East Lincolnshire | £24,420 | £27,533 |
| East Riding of Yorkshire | £26,693 | £31,997 |
| Kingston upon Hull, City of | £22,775 | £24,598 |
| North Lincolnshire | £27,351 | £31,788 |
| England | £27,375 | £33,975 |

Source: Annual Survey of Hours and Earnings 2013

Historical trends in the median annual gross earnings of residents are presented in Figure 4-6. This demonstrates that, other than occasional volatility, North East Lincolnshire has experienced a similar growth in earnings compared to other areas and the national average. However, this has resulted in a persistent gap between local and national average earnings.

Figure - Median annual gross earnings of residents (2002-2013) Source: Annual Survey of Hours and Earnings 2013

Table 4-9 presents the median and mean figures for those who work in North East Lincolnshire. As might be expected given the significant retention of the workforce within the area, as demonstrated in section 3, median earnings are similar. A higher level of mean earnings reflects some higher-paid workers commuting into the area from elsewhere (e.g. North Lincolnshire - see section 3.2 for Travel to Work data).

Table - Annual gross workplace earnings (2013)

| Area | Median | Mean |
| --- | --- | --- |
| North East Lincolnshire | £24,301 | £29,043 |
| North Lincolnshire | £27,493 | £30,716 |
| East Riding of Yorkshire | £24,752 | £28,559 |
| Kingston upon Hull, City of | £23,650 | £27,522 |
| England | £27,376 | £33,975 |

Source: Annual Survey of Hours and Earnings 2013

Figure 4-7 depicts median workplace earnings since 2002. A similar pattern to the median resident earnings is observable, in that North East Lincolnshire has experienced broadly similar rates of growth to the national average, but as such the disparity between the two has remained.

Figure - Median annual gross workplace earnings (2002-2013)

Source: Annual Survey of Hours and Earnings 2013

# Economic Output & Productivity

Gross value added (GVA) is equal to the value of the economic output of an individual, producer, sector or area, minus the value of intermediate consumption. It therefore represents that unit’s contribution to gross domestic product (GDP), before considering taxes and subsidies.

Figure 5-1 compares trend GVA for North & North East Lincolnshire, the most disaggregated spatial area for which GVA data is available. Although all areas follow similar trends, North & North East Lincolnshire as a total area consistently generates greater GVA than the other areas. This trend partly reflects population size but also the more dominant scale of North East Lincolnshire’s economic base . Data on GVA per head is presented in Figure 5-2.

Figure - GVA at current basic prices (1997-2011)

Source: ONS Regional GVA

Figure - Workplace GVA per head at current basic prices (1997-2012)

Source: ONS Regional GVA 2013. 2012 figures provisional.

Figure 5-2 does not significantly alter the conclusions that can be drawn from Figure 5-1. North & North East Lincolnshire is a leader in the Humber region in GVA, consistently outperforming the East Riding, and generally more productive per worker than Hull. However, the area and the wider region fall short when compared to the national average.

Figure - Workplace GVA per head indices (1997-2012)

Source: ONS Regional GVA 2013

Figure 5-3 examines the disparity between national GVA per head and that of North & North East Lincolnshire in more detail. What is evident is that until 1998 GVA per head in the area was roughly equal to the national level. However, this had fallen to around 85% of the national average by the early 2000s and has not significantly recovered since. Nonetheless, the area has generally outperformed other areas in the Humber region in this regard.

Figure - GVA at current basic prices by sector (1997-2011)

Source: ONS Regional GVA

Figure 5-4 and Figure 5-5 disaggregate GVA for North & North East Lincolnshire by sector. Figure 5-4 demonstrates that several sectors, including production, distribution, transport, accommodation and food and public administration, education and heath have seen significant GVA growth. Other sectors, such as information and communication, financial and insurance activities have not, which is perhaps surprising given the general high productivity and growth of these sectors nationally.

Figure 5-5 examines the impact of the recession on the North & North East Lincolnshire economy by comparing sectoral GVA in 2007 to 2011. Some sectors have posted GVA gains, such as non-manufacturing production (again, likely reflecting renewable energy). The real estate and public administration sectors have also posted gains, which is perhaps surprising given the reduced employment in these sectors. Manufacturing production experienced a significant reduction in GVA over the period. This category includes food processing, which is a particularly important local sector.

Figure - Change in GVA by sector (2007-2011)

Source: ONS Regional GVA 2013

## Export Performance

Boosting the UK's export performance is essential for sustained economic growth. The UK Government are seeking to encourage more exporting by business in the UK.

An analysis of the proportion of the employees employed in export intensive industries can provide an understanding in to how the local economy performs in connection to exporting. According to the ONS the biggest exporting sectors (by £) in the UK in 2010[[2]](#footnote-2) were:

* Chemical manufacturing;
* Financial services, except insurance and pension funding;
* Motor vehicles, trailers and semi-trailers;
* Computer, electronic and optical products; and,
* Machinery and equipment.

Table 5-1 shows that North East Lincolnshire has a higher proportion of its employment base employed in these sectors (4.2%) compared to the average for England (4%). It is also comparable to Hull’s (4.2%) and over double North Lincolnshire’s (2%) share. This shows the contribution of North East Lincolnshire’s economy to the national trade balance. Furthermore, given the profile of key sectors in the local economy, there is potential for economic benefits to be accrued through the support of export-oriented activity.

Table - % Employment in Top 5 Exporting Sectors

| Top 5 UK Exporting sectors | North East Lincolnshire | Hull | North Lincolnshire | Yorkshire and The Humber | England |
| --- | --- | --- | --- | --- | --- |
| Chemical manufacturing | 2.7% | 1.0% | 0.5% | 0.6% | 0.4% |
| Financial services, except insurance and pension funding | 0.8% | 0.7% | 0.8% | 2.1% | 1.9% |
| Motor vehicles, trailers and semi-trailers | 0.2% | 1.2% | 0.2% | 0.5% | 0.5% |
| Computer, electronic and optical products | 0.1% | 0.0% | 0.1% | 0.3% | 0.4% |
| Machinery and equipment. | 0.4% | 1.3% | 0.4% | 1.0% | 0.7% |

Source: BRES/ONS 2013

# Innovation

Innovation is a key contributing factor to the competitiveness of an area. Innovation by businesses and individuals can create jobs, wealth and support emerging high-tech sectors such as renewable energy. Innovation is also a feature of knowledge-sharing arising from industrial clustering in the area, for example in seafood, for which Grimsby achieved government recognition as the best industrial grouping in Britain in 2010[[3]](#footnote-3). Innovation can also be driven by public assets such as the Grimsby Institute of Further and Higher Education (GIFHE) which delivers a wide range of courses at pre degree, undergraduate and postgraduate courses. GIFHE also plays a key role in research and development, with the Food Refrigeration and Process Engineering Research Centre (FRPERC) based there.

Analysis of the share of the workforce and firms in knowledge intensive industries provides one assessment of the level of innovation in a local area (Table 6-1). This shows that North East Lincolnshire (4.2%) has a lower proportion of workers in the professional, scientific & technical sectors than the average for England (8%). The situation in comparison to Hull and North Lincolnshire is more encouraging as North East Lincolnshire has a larger share than North Lincolnshire (3.3%) and Hull (4%).

Table 6-1 also shows that the proportion of firms in Professional, scientific and technical sectors in North East Lincolnshire (9.6%) is lower than the average for England (15.3%). However, in firm numbers, North Lincolnshire has a higher proportion (10.1%) and Hull has a lower proportion (8.1%).

Table - % of employees and firms in Professional, scientific & technical sectors

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | North East Lincolnshire | North Lincolnshire | Kingston upon Hull, City of | England |
| Employees | 4.2% | 3.3% | 4.0% | 8.0% |
| Firms | 9.6% | 10.1% | 8.1% | 15.3% |

Source: BRES & ONS 2013

A number of key sectors within North East Lincolnshire require knowledge, skills and innovative activity. For example, the development of new products in the food manufacturing sector and chemical engineering activities in the chemicals and process Industries. The analysis of firm and employment suggests that North East Lincolnshire has a more knowledge intensive economy than Hull but lags behind the average for England. Other measures of innovation show a limited capacity in North East Lincolnshire. Analysis of OECD patent data from 2011 (Table 6-2) shows that North & North East Lincolnshire have a lower patents per 100,000 rate (1.4) than all neighbouring areas and far lower than the average for Lincolnshire (4.6) as a whole and Great Britain (7.5).

Table - OECD Patent Co-operation Treaty Patent applications 2011

| Area | Patents Per 100,000 people |
| --- | --- |
| North & North East Lincolnshire. | 1.4 |
| Kingston upon Hull | 7.1 |
| East Riding of Yorks. | 2.4 |
| Lincolnshire | 4.6 |
| Great Britain | 7.5 |

Source: OECD 2012

Firms in all sectors play an important role in innovation, particularly the key sectors. This is explored in more detail in the key sector report. For example, more detailed analysis of employment data in North East Lincolnshire through a location quotient analysis shows that there are clusters of economic activity which could further encourage and nurture innovation.

# Qualifications & Skills

The qualification profile of North East Lincolnshire’s working age population (16-64 years) has greatly improved over recent years. The proportion of those with no qualifications has dropped by 3% between 2009 and 2013 and the proportion with Level 4 qualifications has risen from 17.3% to 19.9%. This performance is positive given the recent economic conditions and funding changes to education and skills programmes and facilities.

Despite improvement, between 2009 and 2013 North East Lincolnshire has a lower proportion of residents with higher level qualifications (degree level or equivalent) compared with neighbouring local authorities and the national average (Figure 7-1). Furthermore the gap between North East Lincolnshire’s and England’s proportion of workforce with level 4 qualifications has increased (6.9% in 2009 and 11.5% in 2011). This suggests that there is difficulty in matching the progress made in other areas. This could be linked to comparative lack of higher education delivery in North and North East Lincolnshire[[4]](#footnote-4) and evidence of a ‘brain drain’ whereby graduates and other well skilled young people leave the area and do not return to work there.

Figure - % of Working Age Population (16-64) with Level 4 Qualifications

Source: Annual Population Survey 2014

The share of residents with no qualifications has fallen since 2009 (by 2.6%) but not at the same rate as the national average (drop of 3%) (Figure 7-2). However, the share of those with no qualifications is more similar to the national average compared with that of Hull’s.

Those with no qualifications are more at risk of not being in paid work or receiving low rates of pay. Employers and education and training providers play an important role through; providing on the job training, pre-employment education and delivering numeracy and literacy courses to support workers. A range of important sectors in North East Lincolnshire provide opportunities for those without qualifications including healthcare (e.g. NHS) and food manufacturing. Food manufacturing also has a range of workforce skills (e.g. fish filleting) which do not require formal education to possess.

Figure - % of Working Age Population (16-64) with No Qualifications

Source: Annual Population Survey 2014

## Apprenticeships

An apprenticeship provides people with the opportunity to gain on-the-job experience whilst working towards a nationally recognised qualification. Apprenticeships are becoming an increasingly popular route into employment across the UK and the UK Government is working to improve quality of delivery and increase the number of people in apprenticeships.

There has been an increase in apprenticeship take up since 2005/06 in North East Lincolnshire. However, data shows that there has been a slight decline in apprenticeships take up between 2011/12 and 2012/13. This has occurred across all areas apart from North Lincolnshire, which was able to maintain its increase in apprenticeship take up. It has been suggested that the delivery and take-up of apprenticeships is challenged by changes to funding and assessment. However, the experience of North Lincolnshire suggests that some areas are able to manage these issues and continue the improvement in apprenticeship take-up.

Table - Apprenticeship Programme Starts by Local Authority (2005/06 to 2012/13)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Geography | 2005/06 | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 |
| Kingston upon Hull | 1,400 | 1,310 | 1,590 | 1,790 | 1,970 | 3,170 | 3,440 | 3,200 |
| North East Lincolnshire | 540 | 610 | 850 | 740 | 890 | 1,330 | 1,660 | 1,590 |
| North Lincolnshire | 630 | 750 | 960 | 810 | 930 | 1,520 | 1,700 | 1,820 |
| Yorkshire | 22,420 | 24,140 | 29,300 | 32,170 | 36,530 | 55,800 | 64,200 | 59,900 |
| England | 172,600 | 181,800 | 221,500 | 237,100 | 276,900 | 453,000 | 515,000 | 504,200 |

Source: Skills Funding Agency and Department for Business, Innovation and Skills, 2013

## Skills Gaps and Shortages

Skills shortages arise when employers find it difficult to fill their vacancies with appropriately skilled applicants. Skills gaps occur where members of the existing workforce are seen to lack the skills necessary to meet business needs. Research by the UK Commission for Employment and Skills (UKCES) has identified across all local authorities in England the extent to which skills gaps and shortages exist.

Table 7-2 shows the extent to which skills gaps exist across the business base in North East Lincolnshire (and comparator area). It shows that in comparison with the national average (5%), there is a lower proportion of businesses in North East Lincolnshire (4%) with skills gaps. This may be connected to a range of factors including:

* Training delivery within firms is sufficient and helps to address skills gaps. This is supported by Table 7-2 which shows that the incidence of training is higher in North East Lincolnshire (and the Humber) suggesting that this is addressing skills gaps.
* Low incidence of skills gaps can also be linked to the strong performance of local education and training providers. The key sector report explores this in connection to the key sectors.

Table - Skills Characteristics of Workforce

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Skills Issue | Kingston upon Hull | East Riding of Yorks. | North East Lincolnshire | North Lincolnshire | England |
| Staff with skills gaps | 4% | 4% | 4% | 3% | 5% |
| Trained in last 12 months\* | 65% | 68% | 64% | 65% | 62% |
| Trained to qualification in last 12 months\*\* | 16% | 15% | 15% | 15% | 13% |

Source: Employer Skills Survey 2013. \*Modelled data. \*\*Double counting possible in data.

North East Lincolnshire performs strongly in the UKCES’s assessment of skills gaps and skills shortage vacancies (Figure 7-3). There are a low proportion of skills shortage vacancies (2%) in comparison with the national average (3%). This may reflect economic conditions which can support firms seeking to recruit and there being an available pool of labour with the necessary skills.

Figure - Business experience of skill shortage vacancies (SSVS) and skill gaps

Source: Employer Skills Survey 2013. No data available for Kingston upon Hull for ‘SSVs only’.

The impact of skills gaps on businesses in North East Lincolnshire (Figure 7-4) is also less pronounced than the national average with 54% of the business base seeing no impact (compared with 37% of the national average). North East Lincolnshire’s share of businesses with no impact is 6% more than the nearest comparator area (Hull) and suggests that businesses in North East Lincolnshire are either able to overcome skills issues or are not aware of the impact of skills gaps upon their business.

Figure - Impact of skills gaps on businesses

Source: Employer Skills Survey 2013

Despite this positive assessment of skills gaps and shortages experienced by businesses in North East Lincolnshire, the high levels of no qualifications and low levels of Level 4 qualifications in the workforce shows that skills challenges exist.

Positivity connected to the comparative lack of skills gaps, shortages and low subsequent impact from these. This situation also suggests features of the ‘low skills equilibrium’ concept[[5]](#footnote-5) are apparent within the North East Lincolnshire economy (or certain sectors of it). A low skill equilibrium is a concept which characterises a situation whereby *“employers face few skill shortages in a predominantly low skilled workforce, where there is little incentive to participate in education and training and raise qualification levels and aspirations”[[6]](#footnote-6).* This situation highlights a position where the economy is not achieving its true potential and there is little focus upon increasing skills levels and productivity.

In the key sector report we explore skills challenges and issues in connection with sectoral trends, enterprises and growth.

# Housing Market

Housing has a significant role to play in the local economy both as a provider of accommodation for a local workforce but also more directly by providing employment in the construction industry. Attractive, affordable housing is important in creating a sense of place and ensuring the health and wellbeing of the local population.

There were approximately 69,800 households in North East Lincolnshire in 2011. These households represent 3.1% of all households in the Yorkshire & the Humber region. By 2021 it is projected that there will be around 71,300 households in North East Lincolnshire, a rise of 2.3% from 2011 (Figure 8-1). This is expected to be made up largely from a rise in single person households.

Figure - 2011-2021 Household Projections

Source: DCLG 2011

Analysis of housing data from the 2011 Census shows that North East Lincolnshire’s housing tenure is different to the regional and national profile. A third of residents (33%) reside in terraced housing (national average 24.5%) and a lower proportion live in flats or tenement blocks (9.6%) than the national average (16.7%). The high proportion of terraced housing contributes to high housing density and whilst generally terraced housing is of good quality, older terraced housing can contribute to poor living environments through insufficient public space, structural issues and poor vehicular access.

Figure - Housing Tenure (2011)

Source: Census 2011

In 2013/2014, construction of 340 houses were started with 310 completed. The number of housing starts performance has improved since 2010/11 when 290 were being built. Data for house building starts and completions were not made available in 2012/13 demonstrating the low amount of houses started and finished in this year. Overall between 2010 and 2013 a lower number of housing builds were started and completed than North Lincolnshire & Hull (Table 8‑1).

The decline in house building in 2012/13 was mirrored in the neighbouring local authorities and is likely linked to the macro economic conditions with investment by the construction industry contingent on market uplift. As economic conditions improve it is expected that more house building will occur and although this will be reliant on a range of other factors including outwards immigration, migration and commercial investment in major projects.

Table 8‑1 Housing construction, 2010-2014

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Local Authority | Dwellings started | | | | Dwellings completed | | | |
| Private Enterprise | Housing Assocs. | Local Authority | All | Private Enterprise | Housing Assocs. | Local Authority | All |
| Kingston upon Hull | 2,580 | 80 | 0 | 2,660 | 1,250 | 110 | 0 | 1,370 |
| North East Lincolnshire | 660 | 210 | 0 | 870 | 970 | 190 | 0 | 1,160 |
| North Lincolnshire | 880 | 90 | 0 | 970 | 1,160 | 110 | 0 | 1,270 |

Source: DCLG 2014 - Data for North East Lincolnshire suppressed for 2012/13.

Overall, North East Lincolnshire is an affordable place to live, with the average sold house price in January 2014 at £75,822. The value of properties in North East Lincolnshire is closer to that of Hull (£68,397) than North Lincolnshire (£103,264). It is also much lower than the England average of £168,356. Figure 8-3 also shows how average house prices have changed since the recession. House prices in North East Lincolnshire prior to the recession were almost comparable with North Lincolnshire. However since the recession the figures have been consistently lower.

A factor contributing to the lower house prices in North East Lincolnshire is the high proportion of terraced housing in the area. Terraced housing generally commands some of the lowest sales prices of the types of housing available. However, when considering the below average annual pay within North East Lincolnshire (Section 4.4), this contributes to the area being an affordable place to live.

Figure - Average House Prices, January 1995 – January 2014 – Seasonally Adjusted

Source: Land Registry 2013

Population growth and particularly the increased growth in older age groups will place additional demands on the supply of housing. There will be a need to ensure that the supply of housing meets the requirements of the future population, particularly if significant growth in the economy is to be facilitated.

# Labour Market

As shown in Table 9‑1 North East Lincolnshire has a marginally lower economically active proportion of the population compared to the national average, at 76.5%. This is accompanied by a higher rate of unemployment at 10.4%, 4 percentage points higher than the national rate. This suggests that a larger proportion of individuals in North East Lincolnshire than nationally are not seeking employment or unable to find work. This conclusion is supported by the job density rate, which indicates the North East Lincolnshire economy features fewer jobs in relation to the population than the national economy.

Table 9‑1 Economic activity in North East Lincolnshire, Apr 2013 – Mar 2014

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | England (%) | North East Lincolnshire (%) | North Lincolnshire (%) | Kingston upon Hull, City of (%) |
| All People | | | | |
| Economically active | 78.6 | 76.5 | 79.3 | 73.7 |
| In employment | 73.5 | 68.6 | 74.3 | 63.3 |
| Unemployed | 6.4 | 10.4 | 7.3 | 13.5 |
| Males | | | | |
| Economically active | 84.3 | 82.8 | 84.3 | 81.5 |
| In employment | 78.8 | 73.3 | 77.7 | 69 |
| Unemployed | 6.4 | 11.3 | 7.7 | 15 |
| Females | | | | |
| Economically active | 72.9 | 70.5 | 74.2 | 65.4 |
| In employment | 68.1 | 64.1 | 70.9 | 57.2 |
| Unemployed | 6.4 | 8.9 | 4.4 | 12.4 |
| Job Density | 0.79 | 0.7 | 0.7 | 0.73 |

Source: ONS Annual Population Survey. % of those aged 16-64. Percentages are the proportion of economically active population.

The reasons for economic inactivity are diverse and Figure 9-1 shows how the profile of reasons for economic inactivity differs in North East Lincolnshire from the Hull, North Lincolnshire and the national average.

A lower proportion of those who are economically inactive in North East Lincolnshire are students (21%) compared with the national average (26%) and Hull (28%). This is linked to the size of Further and Higher education providers in North East Lincolnshire and other areas, with Grimsby Institute of Further and Higher Education’s 1,700 university students compared to the 20,000 attending Hull University. This also presents a challenge for North East Lincolnshire as a larger proportion of students in the figures for economic inactivity often translates into a more skilled workforce entering the labour market.

**Figure - Reasons for Economic Inactivity (Apr 2013 - Mar 2014)**

Source: Annual Population Survey 2014

A larger share of the economically inactive in North East Lincolnshire are long term sick and temporarily sick compared to the national average, demonstrating the strong links between health and economic inclusion in North East Lincolnshire. There is also a larger share of economically inactive who are retired and looking after the family or home. This reflects the demographic composition (see section 2) but also traditional gender roles in the family that prevent women from seeking work. Individuals classified as inactive due to family commitments or as a result of a long-term illness or disability are more likely to be dependent on out-of-work benefits than those in other categories. This highlights the importance of approaches that can encourage these individuals to join or return to the labour market.

## Unemployment

Figure 9-2 and Figure 9-3 show that unemployment has been severely affected by the economic recession over recent years. Though unemployment has in fact been rising since as early as 2005, this accelerated with the oncoming of the recession, increasing by 3 percentage point from 2008 to 2009, and has since been stable at between 11 and 12%.

As unemployment has increased nationally, the gap between unemployment rates in North East Lincolnshire and the national average has grown, indicating that the area has been particularly negatively affected by the recession and faces challenges in getting people back into employment.

Figure - Proportion of population economically active, 2005-2013

Source: Annual Population Survey

Figure - Unemployment rate, 2005-2013

Source: Annual Population Survey

## Claimant count

As would be expected due to the relatively high levels of unemployment, the proportion of the population claiming Jobseekers Allowance is higher in North East Lincolnshire than nationally, as shown in Table 9‑2. The disparity between claimant count rates (as measured by the ratio) increases with claim duration, suggesting individuals in North East Lincolnshire are more likely to be long-term unemployed. Additionally, the disparity in claimant count rates is greatest for those aged 16-24.

Table 9‑2 JSA claimants by age and duration, October 2013

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **North East Lincolnshire** | **North East Lincolnshire (%)** | **Yorkshire & the Humber (%)** | **Great Britain** | **NEL % : GB %** |
| **(%)** |
| **Aged 16-64** | | | | | |
| Total | 5,230 | 5.2 | 3.9 | 3 | 1.73 |
| Up to 6 months | 2,660 | 2.7 | 1.9 | 1.6 | 1.69 |
| 6-12 months | 860 | 0.9 | 0.7 | 0.5 | 1.8 |
| Over 12 months | 1,710 | 1.7 | 1.4 | 0.9 | 1.89 |
| **Aged 18-24** | | | | | |
| Total | 1,460 | 10.1 | 7 | 5.5 | 1.84 |
| Up to 6 months | 975 | 6.7 | 4.3 | 3.6 | 1.86 |
| 6-12 months | 205 | 1.4 | 1.1 | 0.8 | 1.75 |
| Over 12 months | 280 | 1.9 | 1.6 | 1.1 | 1.73 |
| **Aged 25-49** | | | | | |
| Total | 2,905 | 5.7 | 4.2 | 3.2 | 1.78 |
| Up to 6 months | 1,305 | 2.6 | 1.9 | 1.6 | 1.63 |
| 6-12 months | 515 | 1 | 0.7 | 0.6 | 1.67 |
| Over 12 months | 1,080 | 2.1 | 1.6 | 1.1 | 1.91 |
| **Aged 50-64** | | | | | |
| Total | 845 | 2.8 | 2.2 | 1.9 | 1.47 |
| Up to 6 months | 360 | 1.2 | 0.9 | 0.8 | 1.5 |
| 6-12 months | 135 | 0.4 | 0.3 | 0.3 | 1.33 |
| Over 12 months | 350 | 1.2 | 1 | 0.8 | 1.5 |

Source: ONS Claimant Count 2013. Percentages refer to the number of persons claiming JSA as a proportion of the resident population in age group.

Figure - North East Lincolnshire Claimant count by age group (June 2009-2014)

Source: ONS Claimant Count 2014

Figure 9-4 shows claimant count by age group for the period 2009-2014. This shows that, while the total claimant count rose over the period 2009-2012 and has since begun to fall, the distribution by age group has remained reasonably similar. Since 2012, the claimant count rate in the age group 16-24 has fallen by over 2 percentage points, to around 60% of its 2012 level. A similar, though less significant reduction is observable for the 25-49 age group. Whilst unemployment in the 50-64 age group has remained comparatively low, there has also been less progress since 2012 than in other age groups: unemployment in 2014 stood at around 80% of its 2012 level. This suggests unemployment may be more persistent for this age group, which may be a future cause for concern given the area’s aging population.

Table 9‑3 shows the profile of jobs sought by benefit claimants. A lower proportion of North East Lincolnshire’s claimants are seeking elementary (25%) and sales and customer service occupations (30%) compared with the national average (26% and 37%). A far higher share of claimants are seeking managerial and senior official roles in North East Lincolnshire (14%) than the average for England (5.2%).

Table 9‑3 Occupations ought by benefit claimants (June 2014)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Occupation | North East Lincolnshire (%) | Kingston upon Hull, City of  (%) | North Lincolnshire  (%) | England  (%) |
| 0 : Occupation unknown | 2.0 | 1.3 | 1.8 | 2.5 |
| 1 : Managers and Senior Officials | 14.1 | 3.3 | 13.2 | 5.2 |
| 2 : Professional Occupations | 0.9 | 1.0 | 1.0 | 1.7 |
| 3 : Associate Professional & Technical Occupations | 2.6 | 2.4 | 2.7 | 3.6 |
| 4 : Administrative and Secretarial Occupations | 3.7 | 5.7 | 5.5 | 8.8 |
| 5 : Skilled Trades Occupations | 4.9 | 6.9 | 5.8 | 5.5 |
| 6 : Personal Service Occupations | 4.3 | 4.3 | 4.8 | 4.7 |
| 7 : Sales and Customer Service occupations | 29.9 | 35.0 | 28.3 | 36.5 |
| 8 : Process, Plant and Machine Operatives | 12.8 | 10.1 | 8.8 | 5.5 |
| 9 : Elementary Occupations | 24.9 | 30.1 | 28.3 | 26.0 |

Source: ONS 2014

Table 9‑4 shows the numbers of vacancies notified to employment service job centres. It demonstrates that although there are large proportions of vacancies at ‘Sales and Customer Service’ (16.8%), ‘Process, Plant and Machine’ (24.3%) and ‘Elementary’ Occupations (12.8%) in North East Lincolnshire. There is a low proportion of vacancies at ‘Manager and Senor Official’ (3%). This suggests that North East Lincolnshire has a distinct job creation need which, if met, could address unemployment for a significant number in the local area.

Table 9‑4 Distribution of notified vacancies by occupation - November 2012

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Occupation | North East Lincolnshire | | North Lincolnshire | | Kingston upon Hull, City of | |
|  | **No.** | **%** | **No.** | **%** | **No.** | **%** |
| 1 : Managers and Senior Officials | 20 | 3.0 | 20 | 2.0 | 60 | 4.3 |
| 2 : Professional Occupations | 20 | 2.7 | 20 | 1.6 | 40 | 3 |
| 3 : Associate Professional & Technical Occupations | 60 | 9.5 | 140 | 12.9 | 180 | 12.5 |
| 4 : Administrative and Secretarial Occupations | 40 | 6.0 | 40 | 4.1 | 120 | 7.9 |
| 5 : Skilled Trades Occupations | 120 | 19.0 | 80 | 7.6 | 160 | 11.1 |
| 6 : Personal Service Occupations | 40 | 6.0 | 50 | 4.5 | 100 | 6.8 |
| 7 : Sales and Customer Service occupations | 110 | 16.8 | 160 | 15.4 | 270 | 18.6 |
| 8 : Process, Plant and Machine Operatives | 160 | 24.3 | 300 | 29 | 230 | 15.5 |
| 9 : Elementary Occupations | 80 | 12.8 | 240 | 23 | 300 | 20.2 |
| Column Total | 650 | 100 | 1050 | 100 | 1470 | 100 |

Source: Jobcentre Plus Vacancy Statistics 2014

## Youth Unemployment

Youth unemployment can have many impacts upon young people in the long term with links between unemployment and long-term reductions in wages, increased chances of subsequent periods of unemployment, and poorer health outcomes.

Following the evidence on claimant count data in section 9.2, Table 9‑5 indicates that 7% of 16-18 year olds in North East Lincolnshire are not in employment, education or training (NEET). This is higher than the national rate (6.7%) and the rate for the Yorkshire and the Humber region (6.3%), and nearby North Lincolnshire (5.7%). Though not as significant an issue as in Hull, this suggests improvements could be made. Box 1 provides more detail on youth unemployment and economic activity in North East Lincolnshire.

Table 9‑5 16-18 year olds not in employment, education or training (NEET)

|  |  |  |
| --- | --- | --- |
| Geography | Number | Proportion of age group |
| North East Lincolnshire | 440 | 7.0% |
| Kingston upon Hull | 1,020 | 10.3% |
| North Lincolnshire | 350 | 5.7% |
| Yorkshire and the Humber | 10,660 | 6.3% |
| England | 122,000 | 6.7% |

Source: Department for Education, 2012

## Self Employment

## Box 1: Of North East Lincolnshire’s 18,700 young people aged 16-24



Figure 9-5 demonstrates that rates of self-employment have been historically low in North East Lincolnshire, and in other areas in the sub-region compared to the national level. While this has some positive implications – self-employment represents a less secure income than being an employee – it also suggests the local workforce is more dependent on opportunities created by employers, as there may be a relatively low level of demand for appropriate services, such as construction[[7]](#footnote-7). It may also reflect inadequate support for entrepreneurship locally. Combined with the area’s relatively high level of unemployment, this suggests the workforce is less resilient to economic downturns than elsewhere.

Figure - Self-employment rate, 2005-2013

Source: Annual Population Survey

# Deprivation

Deprivation is a multifaceted concept which is linked to economic activity, health, income and education. The Index of Multiple Deprivation (IMD) is the most commonly used measure of deprivation and provides a ranking of deprivation for areas across England. The IMD covers seven distinct domains; Income Deprivation, Employment Deprivation, Health Deprivation and Disability, Education Skills and Training Deprivation, Barriers to Housing and Services, Living Environment Deprivation, and Crime.

North East Lincolnshire is the 46th most deprived local authority area in England. Within North East Lincolnshire, there are 107 Lower Super Output Areas with 10 of these ranked in the top 4% of deprived areas in England[[8]](#footnote-8).

There are specific deprivation issues affecting North East Lincolnshire, with particular challenges with regard to access to services, transport, limited employment opportunities and difficulties accessing education and training. We have discussed employment, income and skills elsewhere in this economic assessment. However, it is worthwhile exploring health deprivation because of its significance to economic activity and linkages to quality of life and future prosperity.

## Health

A Department of Health profile in 2012[[9]](#footnote-9) for North East Lincolnshire states that the ‘health of the people in North East Lincolnshire is generally worse than the England average’. The profile also highlights the following points about the Local Population’s health:

* Early death rates from cancer and from heart disease and stroke have fallen since 2002 but remain worse than the England average.
* Rates of road injuries and deaths, smoking related deaths and hospital stays for alcohol related harm are worse than the England average.

Life expectancy is lower than the average for England. In 2011 the life expectancy of a North East Lincolnshire male (77.7 years) was slightly lower than male life expectancy regionally (78.1) and nationally (78.6). This is also the case for females, with the overall life expectancy in North East Lincolnshire (81.8) being below the national (82.6) and regional (82) figure.

Table 10‑1 Life expectancy by gender

|  |  |  |
| --- | --- | --- |
| Area | Male | Female |
| North East Lincolnshire | 77.7 | 81.8 |
| Kingston upon Hull | 75.9 | 80.4 |
| North Lincolnshire | 78.5 | 82.2 |
| Yorkshire and the Humber | 78.1 | 82.0 |
| England | 78.6 | 82.6 |

Source: Department of Health. Estimates based on 2009-11 data.

There is a growing body of evidence that sport can deliver benefits across a wide range of public policy agendas including: physical and psychological health, social participation and increased likelihood of lifelong learning, and reduction of crime and community cohesion.

North East Lincolnshire has important sporting assets including several outdoor and indoor facilities, gyms and swimming pools. Recent improvements to swimming facilities and a potential new stadium for Grimsby Town FC could place sport at the heart of local communities in North East Lincolnshire. This is important given that data from Sport England Active People’s Survey suggests that residents in North East Lincolnshire in 2011/12 are less active than many of the neighbouring local authorities, the regional and national average (Table 10-2). However, participation has varied since data was collected and further understanding of how sport participation can be encouraged is needed.

**Table - Adults (Aged 16+) Participating in Sport At Least Once Per Week**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Year | North East Lincolnshire | Kingston upon Hull | North Lincolnshire | East Riding of Yorkshire | Yorkshire and the Humber | England |
| 2005/06 | 29.9% | 31.3% | 33.0% | 35.2% | 33.1% | 34.2% |
| 2007/08 | 33.2% | 32.5% | 34.7% | 35.1% | 35.5% | 35.8% |
| 2008/09 | 32.4% | 32.0% | 34.1% | 31.5% | 34.0% | 35.7% |
| 2009/10 | 31.9% | 31.1% | 29.2% | 34.0% | 35.2% | 35.3% |
| 2010/11 | 36.0% | 33.3% | 32.3% | 31.4% | 34.6% | 34.8% |
| 2011/12 | 31.8% | 34.1% | 30.0% | 38.3% | 36.3% | 36.0% |
| 2012/13 | 33.9% | 34.2% | 30.7% | 37.6% | 36.2% | 35.7% |

Source: Sport England Active People Survey 2013 – note no data for 2006/07

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1. Nomenclature of Territorial Units for Statistics [↑](#footnote-ref-1)
2. Latest data available. [↑](#footnote-ref-2)
3. Grimsby Telegraph. 26th March 2010. ‘Food Town heroes scoop top award’. Available at: <http://www.grimsbytelegraph.co.uk/Food-Town-heroes-scoop-award/story-11548325-detail/story.html> [↑](#footnote-ref-3)
4. Although Grimsby Institute of Further & Higher Education and other colleges in North Lincolnshire offer university courses, this is through a ‘Higher Education in Further Education’ model which is more selective of the courses on offer and is far smaller than Hull and Lincoln University’s course offer. There is also less research funding and opportunities for progression. However, the ‘HE in FE’ model does have significant advantages including; lower costs, more vocational focus and attracting more people from diverse backgrounds. [↑](#footnote-ref-4)
5. Wilson, Rob A., and Terence Hogarth. "Tackling the Low Skills Equilibrium: A review of issues and some new evidence." (2003). [↑](#footnote-ref-5)
6. Page 4 - Wilson, Rob A., and Terence Hogarth. "Tackling the Low Skills Equilibrium: A review of issues and some new evidence." (2003). [↑](#footnote-ref-6)
7. The 2011 UK Census indicates that 42% of all workers in the construction industry are self-employed. [↑](#footnote-ref-7)
8. E01013142, E01013209, E01013205, E01013210, E01013208, E01013212, E01013136, E01013137, E01013138 and E01013139. [↑](#footnote-ref-8)
9. <http://www.apho.org.uk/> [↑](#footnote-ref-9)