

Wigan Economy Briefing

Issue 3

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Introduction

Welcome to the third Wigan Economy Briefing produced by the Economic Regeneration Office of the Council. The content and format of this bulletin has evolved from the first bulletin circulated in June 2010 and provides a comprehensive and up to date view of the Wigan Economy.

The briefing does not provide a macro economic analysis of the Wigan economy in terms of Gross Value Added (GVA). It does provide a local view of some key indicators of economic performance, together with analysis in an economic context where applicable.

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Summary of key points

- Wigan's skills position continues to improve
- In 2010, 56% of all 15 year olds achieved 5+ A*-C GCSE's including English and Maths - well above the national average of 53.4%. Between 2006-2010 Wigan's rate of improvement almost doubled the national average
- Take up of apprenticeships increased 44% on 2008/09 figures, with some 2,088 apprenticeship starts. Of these 1,200 apprentices were between 16 and 18, with 237 at NVQ level 3.
- Currently 15% of all apprenticeships started in Greater Manchester are by Wigan residents - the highest number of apprenticeship starts across Greater Manchester.
- Headline unemployment increased by 541 in January 2011 to 8,790. However, on an annual basis, unemployment in Wigan declined by almost 14%, significantly above the Greater Manchester average.
- Since January 2011, unemployment amongst 18 to 24 year olds reduced by almost 56% on January 2010 figures, further evidence of the positive impact Future Jobs Fund is having on the youth unemployment
- Numbers of Wigan residents returning to work continues to increase with almost 600 people finding employment in January 2011, these are the highest return to work figures since January 2000 and represents a 4.4% increase on January 2010 figures.
- Job Centre + advertised 1,092 vacancies in January 2011 with vacancies within the banking, finance and insurance sector making up the majority of jobs advertised.
- Although private sector confidence remains fragile January 2011 saw significant growth in the number of jobs advertised amongst associate professional and technical occupations alongside personal service occupations
- The Intensive Start Up Support service (ISUS) created 214 new businesses between April and January 2011 accounting for 20% of all Greater Manchester starts during this time.

Skills and qualifications

GCSE Performance

| | % of 15 old students achieving 5+A*-C (and equivalent) | | | | | Change 06 to 10 |
|------------------------|--|-------|-------|-------|-------|-----------------|
| | 2006 | 2007 | 2008 | 2009 | 2010 | |
| LA Average | 56.8% | 60.7% | 66.4% | 69.8% | 75.8% | 19.0% |
| England Average | 58.5% | 60.9% | 65.3% | 70.0% | 75.4% | 16.9% |
| Gap | -1.7% | -0.2% | 1.1% | -0.2% | 0.4% | |

Source: DfE School and College Achievement Tables 2010

| | % of 15 year old students achieving 5+A*-C (and equivalent) including English and maths GCSEs | | | | | Change 06 to 10 |
|------------------------|---|-------|-------|-------|-------|-----------------|
| | 2006 | 2007 | 2008 | 2009 | 2010 | |
| LA Average | 41.7% | 44.7% | 45.8% | 48.7% | 56.0% | 14.3% |
| England Average | 45.6% | 46.3% | 47.6% | 49.8% | 53.4% | 7.8% |
| Gap | -3.9% | -1.6% | -1.8% | -1.1% | 2.6% | |

Source: DfE School and College Achievement Tables 2010

The above tables summarise the achievement of GCSE qualifications over the period 2006 to 2010. They show the significant improvement that has been made compared to the national average. In both instances, Wigan's 2010 performance exceeds the national average. Crucially, Wigan's rate of improvement is substantially higher than the national average at 19% for those achieving 5 GCSE's at A*-C and 14.3% for those achieving 5 GCSE's at A*-C including English and Maths, compared 16.9% and 7.8% respectively for England.

These improvements should result in higher skill levels within the workforce as more young people enter the labour market with at least Level 2 qualifications.

Apprenticeships

Wigan has the highest take up of apprenticeships in the whole of Greater Manchester.

- Figures from the National Apprenticeship Service show that in 2009/10, 2,088 borough residents started apprenticeships, up 44 % on 2008/9. For the second year running, Wigan has had the highest number of apprentice starts across Greater Manchester.
- Currently 15 % of all apprenticeships started in Greater Manchester are by Wigan Borough residents.
- Over 1,200 of the apprentices were between 16 and 18, with 237 at Level 3, again the highest figures in Greater Manchester

These strong foundations in skills will stand the borough in good stead economically making the area a more attractive place for companies to invest and expand.

Not in Employment, Education or Training (NEET)

| | Jul-10 | Jul-09 | Aug-10 | Aug-09 | Sep-10 | Sep-09 |
|-------------------|--------|--------|--------|--------|--------|--------|
| Wigan | 9.2% | 10.2% | 10.5% | 10.6% | 8.8% | 9.2% |
| North West | 8.8% | 10.0% | 9.4% | 10.5% | 7.6% | 8.5% |
| GM | 9.1% | 10.0% | 9.8% | 10.7% | 7.7% | 9.0% |
| England | 7.2% | 8.0% | 7.8% | 8.7% | 7.4% | 8.0% |

NEET Comparison (National Figures) 2009-10

During this quarter the NEET in Wigan remained below the 2009 figure and again reflected improved performance both across the North West and England. Targeted transition arrangements for school leavers and the successful delivery of the September Guarantee (where 99% of year 11 leavers received an offer of learning) has contributed to this achievement. Working Neighbourhoods Funding (WNF) has also been used throughout the quarter by Connexions and partners to offer a range of opportunities including taster sessions and training programmes.

Unemployment analysis

Comparison of unemployment across Greater Manchester

| | January 2010 | December 2010 | January 2011 | Monthly change | Annual Change |
|-------------------------------|-----------------|------------------|-----------------|-------------------|------------------|
| Bolton | 8,634 | 7,133 | 7,601 | 6.56% | -11.96% |
| Bury | 4,918 | 3,890 | 4,178 | 7.40% | -15.05% |
| Manchester | 18,848 | 16,941 | 17,637 | 4.11% | -6.43% |
| Oldham | 7,582 | 6,273 | 6,798 | 8.37% | -10.34% |
| Rochdale | 7,794 | 6,595 | 7,031 | 6.61% | -9.79% |
| Salford | 8,194 | 6,882 | 7,109 | 3.30% | -13.24% |
| Stockport | 6,796 | 5,348 | 5,760 | 7.70% | -15.24% |
| Tameside | 7,193 | 5,706 | 6,062 | 6.24% | -15.72% |
| Trafford | 4,847 | 4,102 | 4,307 | 5.00% | -11.14% |
| Wigan | 10,214 | 8,249 | 8,790 | 6.56% | -13.94% |
| Greater Manchester | 85,020 | 71,119 | 75,273 | 5.84% | -11.46% |

Headline unemployment increased by 541 in January 2011, an increase of 6.56% from the previous month and above the Greater Manchester average. This has to be considered disappointing in relation to the excellent reductions achieved throughout 2010. On an annual basis, Wigan's unemployment declined by almost 14%, which is significantly better than the Greater Manchester average.

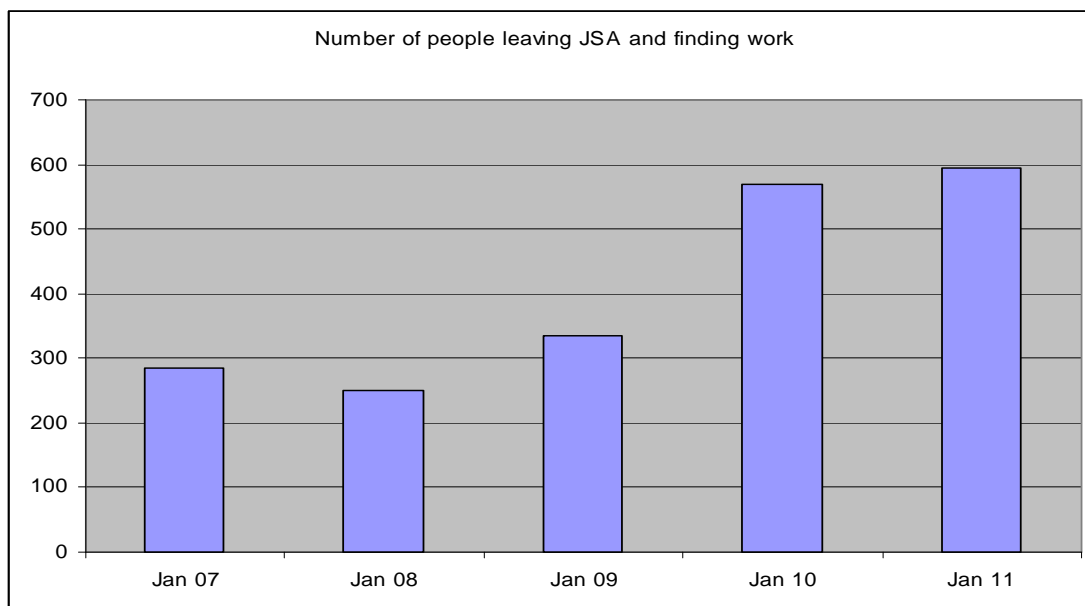
Unemployment amongst 18 to 24 year olds – longer than 6 months

| | January 2010 | December 2010 | January 2011 | Monthly Change | Annual Change |
|-------------------------------|-----------------|------------------|-----------------|-------------------|------------------|
| Bolton | 830 | 320 | 390 | 21.88% | -53.01% |
| Bury | 415 | 150 | 180 | 20.00% | -56.63% |
| Manchester | 1,630 | 905 | 940 | 3.87% | -42.33% |
| Oldham | 675 | 255 | 310 | 21.57% | -54.07% |
| Rochdale | 915 | 425 | 445 | 4.71% | -51.37% |
| Salford | 660 | 395 | 420 | 6.33% | -36.36% |
| Stockport | 630 | 250 | 245 | -2.00% | -61.11% |
| Tameside | 710 | 305 | 325 | 6.56% | -54.23% |
| Trafford | 280 | 175 | 180 | 2.86% | -35.71% |
| Wigan | 1,130 | 450 | 500 | 11.11% | -55.75% |
| Greater Manchester | 7,875 | 3,625 | 3,935 | 8.55% | -50.03% |

Long term unemployment amongst 18 to 24 year olds also increased significantly in January 2011, with an increase of 50 claimants or 11.11%, again significantly above the Greater Manchester average. This client group is the principle focus for the Future Jobs Fund in Wigan.

Wigan's annual reduction of almost 56% is significantly better than the overall reduction in headline unemployment (13.94%) and this can be directly attributed to the Future Jobs Fund (FJF). In order to quantify the impact of FJF in Wigan on the target group, the number of people from this group not claiming benefit because of FJF needs to be calculated. In December 2010 (latest data available) there were 293 people employed on the programme. There had also been 224 programme leavers, 135 of which had gone onto other employment (including contract extensions). Therefore, as of December 2010, 428 people from the target group were not claiming benefits as a result of FJF. It is there reasonable to assume that without FJF, the actual number of claimants in Wigan from this client group would have been over 900 compared to the actual figure of 450.

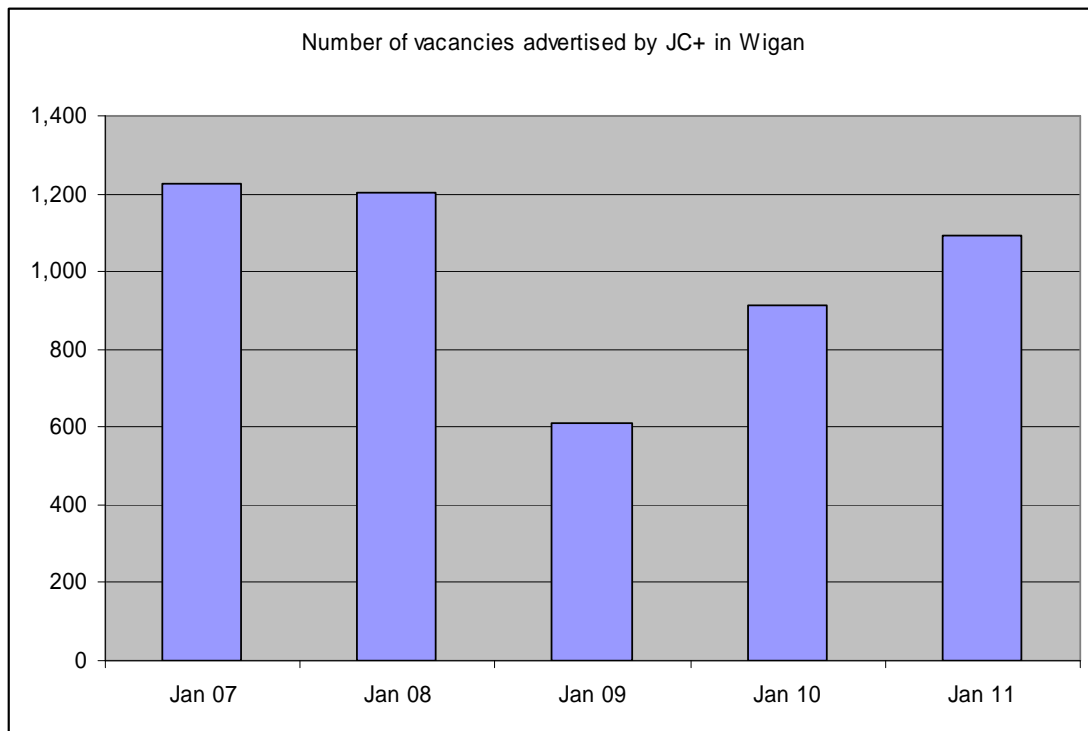
Return to work figures



The headline Job Seekers Allowance claimant rate is only half the picture when assessing the state of unemployment in the borough. In any one month people will join the unemployment register (on-flow) and also leave the register (off-flow). People stop claiming Job Seekers Allowance for a variety of reasons the most important of which being that they have found a job. In January the on-flow exceeded the off-flow by 541, but of significant importance is the fact that almost 600 people stopped claiming JSA and returned to work in January 2011, which is the highest January figure since 2000 and a 4.4% increase on January 2010. The increase in the numbers of people returning to work coincides with the implementation of the worklessness strategy for Wigan supported by Working Neighbourhoods Fund.

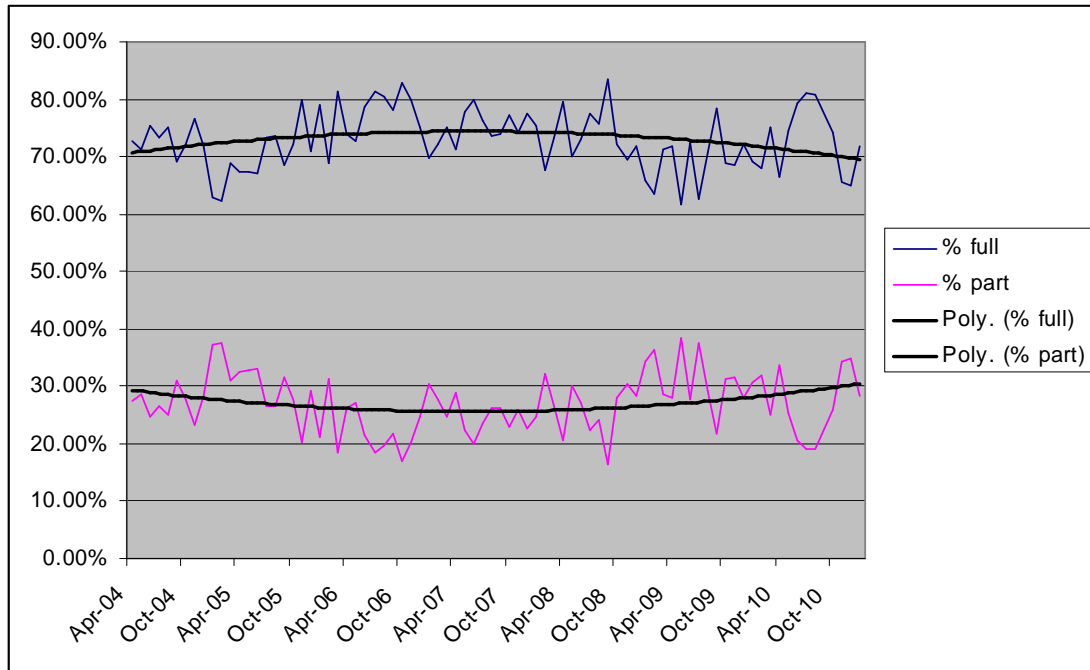
Job Centre Plus vacancy rates

Year on year comparison for January 2011



The health of a local economy can be assessed by analysing the number of vacancies advertised by Job Centre Plus, who currently manage approximately 40% of all advertised vacancies in the UK. In order to eliminate seasonality the vacancy rates for the same month year on year are compared. Whilst the vacancy rates for January 2011 have not reached the pre-recession levels, they are showing encouraging growth from January 2009 and 2010.

Part time vacancies compared to full time



The above chart compares the percentage of part time and full time jobs since April 2004. The trend lines clearly illustrate an increasing number of part time jobs compared to full time. Current figures indicate a 5% increase in part-time vacancies which has been matched by a 5% decrease in full time vacancies. This trend towards part time working has been reflected across the country.

Vacancies by sector

| Industry | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|---|--------------|--------------|--------------|--------------|--------------|
| Agriculture and fishing | 0 | 10 | 7 | 1 | 3 |
| Energy and water | 2 | 2 | 6 | 3 | 3 |
| Manufacturing | 46 | 28 | 16 | 49 | 24 |
| Construction | 25 | 32 | 16 | 37 | 37 |
| Distribution, hotels and restaurants | 238 | 87 | 65 | 69 | 136 |
| Transport and communications | 12 | 49 | 12 | 23 | 36 |
| Banking, finance and insurance | 754 | 783 | 328 | 537 | 705 |
| Public administration, education & health | 100 | 103 | 147 | 127 | 114 |
| Other services | 47 | 108 | 12 | 67 | 34 |
| | 1,224 | 1,202 | 609 | 913 | 1,092 |

Analysing the vacancies by sector pre and post recession highlights some interesting characteristics. Since the recession, vacancies within the banking, finance and insurance sectors has more than doubled as have vacancies in distribution, hotels and restaurants. Vacancies within the public sector have declined from January 2009 but are still higher than pre-recession levels.

Vacancies by occupation

| Occupation | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|--|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Managers and Senior Officials | 35 | 26 | 16 | 36 | 28 |
| Professional Occupations | 58 | 49 | 9 | 27 | 12 |
| Associate Professional and Technical Occupations | 141 | 67 | 58 | 137 | 181 |
| Administrative and Secretarial Occupations | 107 | 112 | 79 | 111 | 68 |
| Skilled Trades Occupations | 74 | 69 | 33 | 32 | 74 |
| Personal Service Occupations | 68 | 77 | 104 | 77 | 132 |
| Sales and Customer Service occupations | 317 | 89 | 68 | 131 | 158 |
| Process, Plant and Machine Operatives | 106 | 179 | 66 | 159 | 242 |
| Elementary Occupations | 318 | 534 | 176 | 203 | 197 |
| | 1,224 | 1,202 | 609 | 913 | 1,092 |

Analysing vacancies by occupation gives a more detailed picture of the type of jobs being advertised and again highlight some interesting trends and characteristics. Associate professional and technical occupations had more vacancies in January 2011 than pre-recession levels, as did personal service occupations, skilled trades occupations, sales and customer service occupations and process plant and machine operatives.

| Associate Professional and Technical Occupations | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|---|---------------------|---------------------|---------------------|---------------------|---------------------|
| Sales representatives | 82 | 23 | 20 | 90 | 85 |
| Nurses | 1 | 18 | 1 | 9 | 48 |
| Product, clothing and related designers | 4 | 0 | 0 | 0 | 15 |
| Youth and community workers | 4 | 1 | 7 | 7 | 8 |
| Marketing associate professionals | 0 | 1 | 1 | 1 | 7 |
| Legal associate professionals | 1 | 0 | 0 | 0 | 4 |
| Dispensing opticians | 0 | 1 | 2 | 0 | 2 |
| Statutory examiners | 0 | 0 | 0 | 0 | 2 |
| Occupational hygienists and safety officers (health and safety) | 0 | 0 | 0 | 1 | 2 |
| Electrical/electronics technicians | 0 | 0 | 0 | 0 | 1 |
| Engineering technicians | 1 | 1 | 1 | 2 | 1 |
| Draughtspersons | 0 | 1 | 0 | 0 | 1 |
| Housing and welfare officers | 1 | 3 | 3 | 5 | 1 |
| Finance and investment analysts/advisers | 2 | 1 | 0 | 0 | 1 |
| Business and related associate professionals n.e.c. | 1 | 0 | 1 | 0 | 1 |
| Estate agents, auctioneers | 1 | 0 | 0 | 1 | 1 |
| Vocational and industrial trainers and instructors | 0 | 5 | 2 | 2 | 1 |

Further drill down reveals the actual jobs being advertised. It is interesting that the demand for sales representatives is now above pre-recession levels. This could be an indication of increasing private sector confidence as businesses may be looking to expand.

| Skilled Trades Occupations | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|
| Plumbers, heating and ventilating engineers | 7 | 1 | 3 | 5 | 15 |
| Carpenters and joiners | 1 | 6 | 2 | 7 | 15 |
| Bricklayers, masons | 2 | 2 | 0 | 0 | 9 |
| Motor mechanics, auto engineers | 4 | 6 | 0 | 1 | 7 |
| Electricians, electrical fitters | 18 | 11 | 4 | 2 | 5 |
| Chefs, cooks | 12 | 16 | 11 | 8 | 5 |
| Vehicle body builders and repairers | 0 | 0 | 0 | 0 | 3 |
| Sheet metal workers | 3 | 0 | 0 | 0 | 2 |
| Welding trades | 12 | 5 | 3 | 3 | 2 |
| Glaziers, window fabricators and fitters | 1 | 2 | 1 | 0 | 2 |
| Bakers, flour confectioners | 2 | 2 | 0 | 1 | 2 |
| Gardeners and groundsmen / groundswomen | 0 | 1 | 1 | 0 | 1 |
| Metal working production and maintenance fitters | 1 | 1 | 1 | 1 | 1 |
| Vehicle spray painters | 0 | 1 | 0 | 0 | 1 |
| Roofers, roof tilers and slaters | 1 | 0 | 0 | 0 | 1 |
| Construction trades n.e.c. | 1 | 6 | 4 | 0 | 1 |
| Plasterers | 1 | 1 | 0 | 1 | 1 |
| Furniture makers, other craft woodworkers | 2 | 0 | 0 | 0 | 1 |

The number of vacancies in construction related trades is also encouraging with 41 advertised compared to 21 in January 2008 (pre-recession).

| Personal Service Occupations | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|-------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Care assistants and home carers | 29 | 44 | 72 | 56 | 115 |
| Beauticians and related occupations | 0 | 2 | 4 | 0 | 6 |
| Nursery nurses | 15 | 6 | 6 | 6 | 5 |
| Sports and leisure assistants | 2 | 0 | 0 | 1 | 2 |
| Educational assistants | 6 | 11 | 5 | 3 | 1 |
| Travel agents | 0 | 2 | 2 | 2 | 1 |
| Hairdressers, barbers | 3 | 1 | 5 | 2 | 1 |
| Caretakers | 2 | 0 | 1 | 0 | 1 |

Personal service vacancies have increased significantly from pre-recession levels with dramatic growth in care assistants and home carers.

| Sales and Customer Service occupations | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|---|---------------------|---------------------|---------------------|---------------------|---------------------|
| Sales and retail assistants | 142 | 22 | 33 | 29 | 106 |
| Call centre agents/operators | 19 | 8 | 0 | 34 | 15 |
| Customer care occupations | 32 | 18 | 1 | 5 | 15 |
| Telephone salespersons | 73 | 15 | 6 | 8 | 12 |
| Sales related occupations n.e.c. | 38 | 10 | 15 | 43 | 8 |
| Collector salespersons and credit agents | 4 | 0 | 1 | 0 | 1 |
| Debt, rent and other cash collectors | 4 | 9 | 11 | 0 | 1 |
| Retail cashiers and check-out operators | 0 | 1 | 0 | 1 | 0 |
| Roundsmen/women and van salespersons | 2 | 6 | 0 | 1 | 0 |
| Merchandisers and window dressers | 3 | 0 | 1 | 10 | 0 |

Vacancies for sales and retail assistants showed a significant jump in January 2011 compared to 2008/2009/2010. However, they are still lower than January 2007 but this period was the start of recruitment for the Grand Arcade.

| Process, Plant and Machine Operatives | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|
| Food, drink and tobacco process operatives | 6 | 10 | 24 | 11 | 90 |
| Heavy goods vehicle drivers | 7 | 32 | 15 | 59 | 58 |
| Van drivers | 7 | 30 | 3 | 17 | 48 |
| Fork-lift truck drivers | 3 | 7 | 3 | 16 | 24 |
| Assemblers and routine operatives n.e.c. | 11 | 43 | 8 | 11 | 12 |
| Taxi, cab drivers and chauffeurs | 0 | 1 | 0 | 0 | 3 |
| Rubber process operatives | 0 | 0 | 0 | 0 | 2 |
| Mobile machine drivers and operatives n.e.c. | 0 | 1 | 0 | 3 | 2 |
| Assemblers (electrical products) | 0 | 0 | 0 | 1 | 1 |
| Routine inspectors and testers | 2 | 42 | 1 | 10 | 1 |
| Sewing machinists | 0 | 0 | 0 | 2 | 1 |

There is encouraging growth within the food sector for process operatives together with increased demand for HGV drivers, van drivers and fork lift truck drivers. All of these increases in vacancy rates would suggest increasing confidence within the private sector in the area.

| Elementary Occupations | January 2007 | January 2008 | January 2009 | January 2010 | January 2011 |
|---|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Other goods handling and storage occupations n.e.c. | 71 | 137 | 22 | 26 | 51 |
| Cleaners, domestics | 40 | 34 | 23 | 40 | 47 |
| Security guards and related occupations | 15 | 75 | 3 | 11 | 17 |
| Car park attendants | 3 | 1 | 2 | 5 | 11 |
| Packers, bottlers, canners, fillers | 86 | 94 | 23 | 42 | 10 |
| Postal workers, mail sorters, messengers, couriers | 6 | 1 | 21 | 21 | 8 |
| Elementary security occupations n.e.c. | 0 | 0 | 0 | 3 | 8 |
| Labourers in building and woodworking trades | 18 | 11 | 18 | 13 | 7 |
| Labourers in process and plant operations n.e.c. | 34 | 2 | 3 | 1 | 7 |
| Bar staff | 16 | 73 | 10 | 4 | 7 |
| Refuse and salvage occupations | 0 | 5 | 10 | 14 | 6 |
| Leisure and theme park attendants | 2 | 0 | 0 | 0 | 5 |
| Labourers in other construction trades n.e.c. | 4 | 15 | 20 | 0 | 3 |
| Kitchen and catering assistants | 13 | 22 | 8 | 10 | 3 |
| Window cleaners | 1 | 1 | 3 | 0 | 2 |
| Launderers, dry cleaners, pressers | 1 | 0 | 0 | 0 | 2 |
| Industrial cleaning process occupations | 1 | 0 | 0 | 12 | 1 |
| Hotel porters | 0 | 2 | 0 | 0 | 1 |
| Waiters, waitresses | 2 | 9 | 10 | 0 | 1 |

In contrast to many other sectors, the demand for elementary occupations has declined for January 2011. This decline potentially has an impact as many of the jobs advertised will not require formal qualifications and within Wigan we still have a significant number (albeit declining) of residents who fall in this category.

Worklessness

Out of work benefits

Out of work benefits include Job Seekers Allowance, Incapacity Benefit, Lone Parents Benefit plus other work related benefits.

The statistics for these benefits are normally produced by Department for Work and Pensions (DWP) on a quarterly basis and quarterly in arrears. However, DWP will not be releasing the August 2010 statistics until March 2011 and therefore no further analysis can be completed over and above what was included in the previous bulletin. A further bulletin will be produced to report the August 2010 worklessness statistics.

Wigan business population

ISUS Performance

Statistics for the Intensive Start Up service are produced by Action 4 Employment; however there has been no update on performance figures this quarter. Preliminary figures indicate that ISUS has created 214 new businesses for the 10 months from April 2010 to January 2011. This is below the profiled performance of 265. However, there are 39 starts that have been submitted to the NWDA but have been “banked” for inclusion in FY 2011/12 and therefore not registered for this FY.

Never the less, 214 starts compares very favourably to other areas accounting for 20% of all Greater Manchester starts and 7% of all North West starts.

The 214 starts have so far created 264 jobs (i.e. 50 additional jobs).

Future Reporting Methods

With government reporting requirements set to change going forward, it is likely that a number of previously reported datasets will not be maintained. Officers within Economic Regeneration are currently identifying substitute data sources in order to continue producing the same level of analysis experienced in previous bulletins. Readers should be aware, however, that this may result in inconsistent reporting methods.

Housing market overview – July 2010 to Sept. 2010

The following information is taken from Issue 5 of the Housing Market update produced by the Housing Strategy Team. The purpose of the summary below is to provide a brief overview of the housing market as an indicator of overall economic trends within the Borough. For more detailed information please consult the original document which can be found here:

<http://www.wigan.gov.uk/Services/Housing/HousingStrategyPolicy/HousingResearch.htm>

The average price of a residential property in Wigan has again increased in the quarter to the end of September. The average price of a home in September was £137,970, and increase of 3.0% on the previous quarter and 7% annually. The higher value properties in the market have experienced the most growth. The top 10% valued properties have increased by 9.7% over the year, whilst upper quartile prices have increased by 6.1% over the quarter. Lower quartile valued properties have had the slowest growth overall both annually (3.5%) and in the quarter (0%).

Whilst house prices in the current quarter have increased again, there are signs that house price growth is beginning to flatten. The next Housing Market Update will perhaps show this more clearly, as the data sets are refreshed and updated. Overall activity in the market continues to remain at low levels and since May, monthly property counts from both Hometrack and the Land Registry have been falling. The property count for the Hometrack data is at its lowest since February 2009. The Land Registry data recorded just over 300 sales in September in the borough. Whilst this figure will change as more sales are registered, the previous September there were 667 sales.

Overall the local housing market is characterised by house prices that seem to flattening. The effects of the government spending cuts are yet to be realised on the wider economy. The overall macroeconomic position of inflation above target levels, incomes not rising in line with inflation, the forthcoming increases in VAT and the continued restricted supply of mortgage finance would indicate that the housing market is likely to remain suppressed in the foreseeable future.