

**REPORT TO:** Employment, Learning & Skills and  
Community PPB

**DATE:** 24<sup>th</sup> September 2018

**REPORTING OFFICER:** Strategic Director, Enterprise, Community &  
Resources

**PORTFOLIO:** Employment Learning & Skills and  
Community

**SUBJECT:** Economic Assessment and Halton 2030

**WARDS:** Borough Wide

## **1.0 PURPOSE OF THE REPORT**

To update members of the committee on the Halton 2030 document and advise on the proposed recommendations arising from the research undertaken. The report is included at Appendix 1.

### **2.0 RECOMMENDATION: That the Policy and Performance Board receives and comments upon the update;**

**2.1** And recommends Halton 2030 to the Executive Board as a reference tool for setting the priorities of the Council and the development of the Corporate Plan.

## **3.0 SUPPORTING INFORMATION**

**3.1** Halton 2030 sets out an economic vision for how Halton's economy will look in the future. It also considers how we might respond through a 'whole community' approach to the economic and social challenges the Council and its partners face over the next few years.

The proposed vision would be that "by 2030 Halton's residents will have access to good quality housing, excellent education, and suitable jobs in a safe, strong and sustainable local economy; and Halton's businesses will have the skills, investment-environment and infrastructure to achieve their goals. Halton will be a place healthy people enjoy, with excellent access to vibrant local town, shopping and entertainment centres."

This report is complemented with Appendix 1 (the full Economic Assessment and Halton 2030 analysis) and Appendix 2 (a table of indicators and measurements) within which the basis of our conclusions is explained and how our success will be gauged.

This work will be a useful reference point for the “Better Jobs Topic Group” which, in turn provides intelligence to the Employment, Learning & Skills and Community PPB.

As a recap, with the economic assessment (used as the evidence base for Halton 2030 we covered:

1. Economic Overview. An assessment of the major factors that are driving the Halton economy (macro-economic factors) and attempt to make sense of them in the local context. External shocks are the most significant uncontrolled factor impacting upon the economy. Therefore, it is important to understand what they are and how useful existing environment scanning is at predicting them in order to mobilise resources appropriately.
2. Enterprise and Jobs. An assessment was completed to investigate the prospects for job growth and business starts in Halton to help us gain an understanding of the factors that lead to a strong performance in the labour market and which factors lead to an individual deciding to start a business. This enables us to better understand how to direct and allocate resources in order to increase the number (and quality) of jobs in the Halton and increase the number of residents who are self-employed – both factors in determining the competitiveness and strengthening of the economy.
3. The Resident Population. An understanding of the resident population and where and how support needs to be targeted to ensure a strong performance in the labour market for the coming years.
4. Skills. The assessment compares the skill demands from employers in Halton with the labour supply of the resident population. The reason for the focus on resident population is because this is where we want to target intervention to ensure that local people benefit from the opportunities in the future economy.
5. Future prospects, Halton 2030 The above four steps inform which interventions we need to put in place to meet the needs of Halton as we advance to the middle of the 21<sup>st</sup> Century. Ensuring that we have the appropriately skilled and trained workforce to meet these demands is one of the clear roles that Halton Borough Council can lead with in order to deliver a strong, sustainable and relevant economy for the local people of Halton. A summary of the recommendations is set out in section 3.2:

- 3.2 This section provides an idea of the headline actions that will allow us to meet the targets as set out in Appendix 2 of this report, Halton 2030 Baseline.

#### Population

- Population monitoring and modelling

We currently don't regularly complete population scenario modelling so this is an exercise that will allow HBC to plan responses to demographic shifts.

This exercise will allow HBC to be more responsive to the demands of employers and strength of the labour supply and which interventions are needed to ensure a mutually strong future.

- Skills and work intention audit and assessment of employers employee succession planning
- We will commission professional workforce development support to ensure that local employers and support organisations understand their future labour demand requirements and how the existing labour supply is geared up to meet that demand
- We need to work with health partners to identify measures which present opportunities for re-skilling older members of the population to help to address the working age population deficit

#### Labour Market and Skills

- Training and workforce development plan

Not employer specific, this more general work stream will point HBC in the direction of training and skills needed to ensure that there is a long-term solution to the existing skills mismatch.

We envisage with this work ensure that local people are provided with employment opportunities and careers with local businesses.

- Quality of life Survey for Halton

The quality of life survey will allow HBC to understand the needs of the local population and consequently the labour market. One of the benefits of a QOL survey is that it allows

us to understand the aspirations and knowledge levels of local people.

- Arrange “local jobs for local people” conference with business and community leaders

Together will all local partners from Halton Employment Partnership, local employer networks and community leaders a series of workshops to be arranged to ensure that local people benefit from the employment opportunities being created on their doorstep. This will help to resolve the lack of understanding about each other.

This work will start with an all partner conference facilitated by leading organisations in recruitment and training.

## Business

- Commission supply chain and future sectors analysis to ensure we get the optimum business base to meet the needs of the supply chain and future business starts.

This analysis will give HBC a better understanding of the business that we need to attract to the area beyond the current target sectors, going beyond the LEP target sectors. We know which the growth sector will be and we want to complement that with a better understanding of how we can better perform as an economy.

- Assess options for the further growth of the business base in Halton, especially exporting.

We already know which sectors are forecast to grow in terms of employment and the number of businesses and we want to formulate a programme of work to ensure that the growth in Halton’s business base benefits local people and the local supply chain

- Develop business start and development programme for growth sectors among Halton’s lowest (25%) imd wards

As part of the above measure we want to target the communities most in need in Halton with a programme designed primarily to encourage people from the lowest 25% of Index of Multiple Deprivation wards into starting a business as part of an ongoing programme. Outcomes for the programme could be starting a business and business survival rates.

## **4.0 POLICY IMPLICATIONS**

There are no immediate policy implications associated with this report but longer term it is envisaged that this work will influence internal and partner corporate processes.

## **5.0 FINANCIAL IMPLICATIONS**

There are no financial implications associated with this report.

## **6.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES**

### **6.1 Children and Young People in Halton**

There are no implications associated with this report.

### **6.2 Employment, Learning and Skills in Halton**

The Economic Assessment and Halton Tomorrow will assist in providing job opportunities for local people and address future employment and skills needs in Halton. It will look at new employment opportunities and self-employment as route into a sustainable and secure future for residents.

### **6.3 A Healthy Halton**

There are no implications associated with this report.

### **6.4 A Safer Halton**

There are no implications associated with this report.

### **6.5 Halton's Urban Renewal**

The analysis of future forecast trends may lead to recommendations for improvement particularly with business premises and infrastructure.

## **7.0 RISK ANALYSIS**

In line with an orange book assessment there is no likelihood or impact of this work on beyond the team performing the task.

## **8.0 EQUALITY AND DIVERSITY ISSUES**

There are no equality or diversity issues.

## **9.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972**

<b>Document</b>	<b>Place of Inspection</b>	<b>Contact Officer</b>
Economic Assessment	Regeneration Team, 5th Floor Municipal Building	Paul Corner
UK industrial Strategy	Regeneration Team, 5 <sup>th</sup> Floor Municipal Building	Paul Corner
Liverpool City Region Skills for Growth Priorities	Regeneration Team, 5th Floor Municipal Building	Paul Corner

## Appendix 1

“Halton is the only local authority in the LEP to outperform the regional benchmark...”

Oxford Economics Forecasting Model

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## Methodology

An economic assessment is a grass roots assessment of the relative strengths and weaknesses of an economy. In order to understand the economy an honest assessment was undertaken to understand which sectors we need to concentrate on in order to deliver prosperity, and appreciate which groups require support to take advantage of the opportunities in the economy.

In Halton we decided to approach the economic assessment through the practitioners delivering economic development and regeneration, in order to ensure that the assessment is both relevant and informed with the most up to date and useful information. Not only does this ensure that the assessment is produced by officers working directly to improve the economic performance of the Borough. It also keeps the cost of the work to a minimum being in-house and developed alongside existing work commitments.

The information analysed in this document will be used to inform the exercise and monitoring of Halton Tomorrow, a vision and baseline document intended to provide focus for the future economic prosperity of Halton, and monitor progress against agreed and challenging targets in the short and medium term.

We know from partners that the information and analysis contained within this assessment provides a valuable resource to inform business planning and resource allocation. As we go through this process we will look to users to suggest possible improvements to future iterations, and include this as part of the annual corporate planning cycle and informing business plans and work allocation plans.

The main data sources informing this assessment include:

- Census of Population (2011)
- Liverpool City Region Forecasting Model (Oxford Economics, 2016)
- Inter Departmental Business Register (IDBR, 2017)
- ONS – Business Demography( 2017)
- Office for National Statistics (2018)
- Wavehill Employer Skills Survey, (Liverpool City Region, 2018)
- National Online Manpower Information Service (NOMIS, 2018)

This assessment has no pretensions to infallibility, let alone to being all-knowing. There may well be facts of which we are unaware that undermine or discredit some of the assumptions we make. If you have facts that we are unaware of please present them so that future iterations can reflect them.

In the sense that we have produced this assessment a fact carries greater weight than opinion on all occasions. Those facts are analysed and that analysis is presented

dispassionately so as to ensure the long-term objectivity of the assessment. This assessment represents a recent factual account of the borough of Halton and we hope it proves to be a useful document.

Any queries in relation to this assessment should be directed to Paul Corner  
[paul.corner@halton.gov.uk](mailto:paul.corner@halton.gov.uk) 0151 511 6730

## Introduction

The evidence base for this economic assessment relies upon three main sources. The first being the Employer Skills Survey(ESS) for the Liverpool City Region, providing a valuable insight into local business experience and aspirations over the coming years. The second source of information is the Office for National Statistics (ONS,) and finally the National Online Manpower Information Service (NOMIS). We mention in the methodology all of the sources of information used in carrying out this assessment.

This is the Halton Local Economic Assessment (LEA). The most recent economic assessment prior to this was produced 2011 and provided a detailed view on local socio-economic conditions. The economy has changed considerably in recent years following the downturn and we are now (on some levels at least) firmly in the midst of recovery. Brexit is the greatest factor of uncertainty we will face in the coming years but we cannot yet analyse the impact as so little is known. As we write this there is still uncertainty concerning future trade arrangements with the European Union, movement of labour and physical barriers – most notably in Northern Ireland.

This LEA provides a detailed analysis of trends in Halton, organised around the broad themes of business, people and place. The report also includes a separate section looking at the contribution that planned developments in Halton and other major employment sites will make to the borough over the next 10-20 years.

Halton is a place of economic scale and significance – although containing 5.4% of the region's population Halton delivers a GVA per head of population of £26,988 compared to a regional average of £22,244 in the North West. This is highlighted because on the surface, (and as a headline figure) this looks good but this exercise has delved deeper into the information looking for patterns and correlations in order to design suitable interventions to improve the quality of life for all Halton residents.

A number of points emerge in the LEA, including:

- **Economic recovery:** The economy and labour market is showing signs of recovery, and almost 4,000 jobs are forecast to be created in Halton over the next decade according to the latest edition of the Liverpool City Region Forecasting Model (LCRFM). Significantly, LCRFM also shows that employment in Halton has now returned to pre-recession levels – however this is still below the regional and national average.
- **Growth opportunities:** In line with trends across most of Liverpool City Region (LCR), future growth in Halton is expected to be driven by sectors such as: scientific and professional services, advanced manufacturing, business,

financial & professional services; the cultural & creative industries; construction; and retail. It is important to note that while manufacturing will continue to see a decline in employment the sector is still expected to see a significant increase in economic activity. This indicates that while the sector will increasingly move away from being the mass employer that it once was. Halton's productivity will continue to grow and advanced manufacturing will retain and grow its relevance.

- Skills: Educational attainment has improved in Halton in recent years, in terms of GCSE results and also the number of people with degree level qualifications. A significant number of Halton's resident working age population hold NVQ level 2 (5 GCSEs at grades A\*-C) and/or NVQ level 3 (2+ A Levels) qualification. The challenge for Halton is to ensure that these residents continue progressing with skills and move into the higher end of the qualifications spectrum, thus increasing the proportion of people with higher level skills. There is a long way to go with the overall improvement of skills of the residential population, despite the excellent local college (Riverside) serving the local community.
- Halton looks to be well-placed to contribute to the growth and competitiveness of LCR and not only as a supplier of skills and labour. Specifically, development at major employment sites across the borough not least those coming to the market as a result of the work of the Mersey Gateway Regeneration Plan Plus, and the 20 hectares that will be available for development. Further to this, we have regionally significant sites including Rock Savage International, Widnes Waterfront and 3MG (including the 'Viking' and 'Thor' sites).

The remainder of the LEA is structured as follows:

Section 4 analyses the labour market of Halton, covering population and skills. It also looks at unemployment trends in the borough, along with self-employment and part-time working.

Section 5 outlines Halton the place and Halton's connectivity with other parts of LCR and the rest of the country. This highlights future developments that are likely to generate new employment opportunities and help in supporting the area's future economic development. It also looks at trends in Halton's housing market.

Section 6 looks at the business base in Halton, highlighting the number of firms in the borough and also the main employment sectors. It also summarises findings from the most recent edition of the LCR Forecasting Model (LCRFM) and looks at

which sectors Halton has specialisms in, relative to the national picture, in the form of sector snapshots.

Section 7 assesses the implications of future development on the economy of Halton and provides concluding remarks, summarising all of the analysis.

A summary is provided at the end of sections two, three, four and five highlighting the main messages from each section.

This assessment constitutes an evidence base needed in order to develop a detailed plan (developed as a separate document) to set targets and to monitor the progress of those actions over the coming four years.

## **Economic Vision for Halton:**

“By 2030 Halton’s residents will have access to good quality housing, excellent education, and suitable jobs in a safe, strong and sustainable local economy; and Halton’s businesses will have the skills, investment-environment and infrastructure to achieve their goals. Halton will be a place healthy people enjoy, with excellent access to vibrant local town, shopping and entertainment centres.”

The vision is crafted to chime with the aspirations of the emerging Local Development Plan for the borough and will be the economic representation of the sustainable community strategy to improve and maintain the highest quality of life and open access to opportunities for Halton residents. It is intended to benefit both businesses and residents.

## Section 2 Population

Subnational population projections are produced by the Office for National Statistics. The projections form a "baseline" view of what the population dynamics would be in the given areas if recent demographic trends were to continue into the future. It is important to note that these projections are consistent across all local authorities in England.

This information is complemented by the Oxford Economic Forecasting Model which shows the population of Halton is set to increase "Halton and Liverpool local authorities have seen the fastest growth in population over the last decade—growing at more than twice the LEP area average and faster than the North West as a whole, driven by positive natural growth and positive net inward migration."

While the City-Region has seen positive population growth over the last decade the legacy of rapid decline throughout the 1990s means the LEP area's population is still well below levels in the early 1990s. The population of Halton currently stands at 126,900 and as stated performs strongly within the City Region, along with Liverpool, with 62,000 males and 64,900 females.

The traditional working age population stands at 62.6% of the population which is slightly lower than the North West and Great Britain at 62.8% and 63.1% respectively. The gender breakdown of working age population shows 62.6% in Halton for males compared to the North West and Great Britain at 63.4% and 63.8% respectively. For females the figures are 62.6%, 62.1% and 62.4% for Halton, North West and Great Britain.

In the medium term (2018-2023):

Halton's population is projected to grow by 4%, from 118,500 to 122,900. This is still lower than the North West region which is projected to grow by 5% and nationally which is projected to grow by 11%.

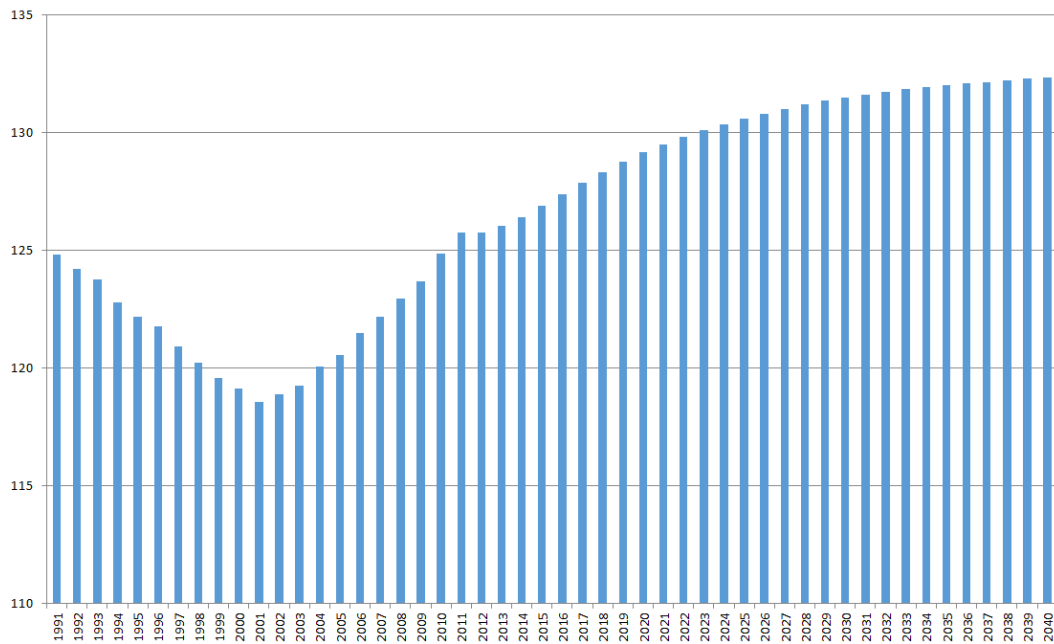
Younger people (0-14 year olds): Projected to grow by 7% (2008-2023).

Working age (15-64 year olds): Projected to decline by 6% (2018-2023).

Older people (65+): Projected to grow by 43% from 16,900 in 2008 to 24,200 in 2023.

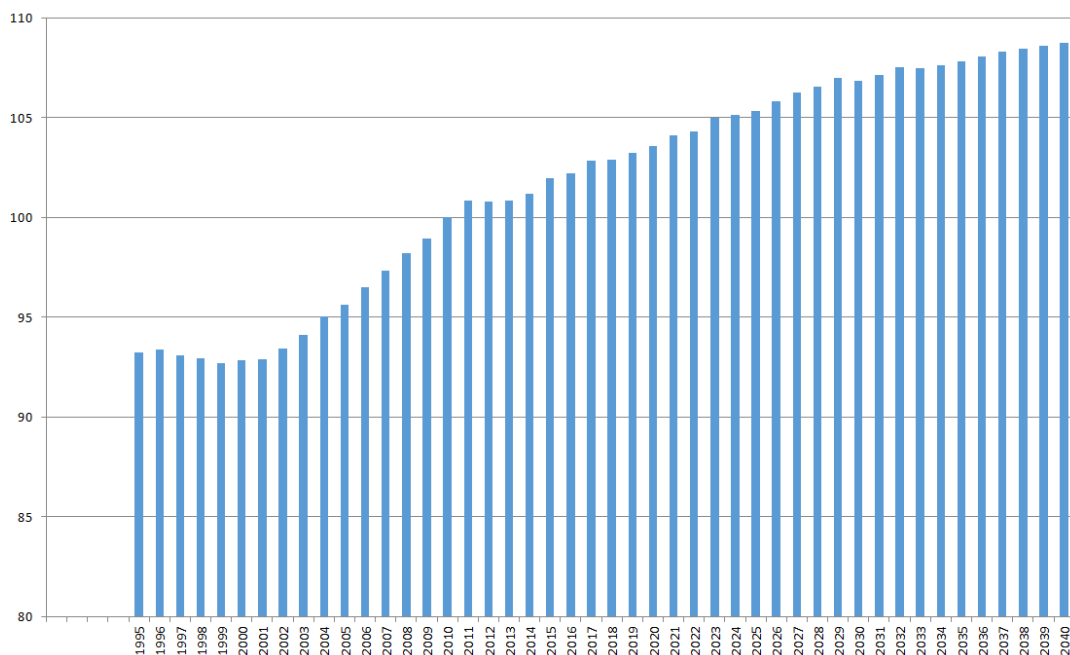
Longer term population growth is quite considerable and the impact of this is assessed in this chapter.

### Halton Population Change 1991 2040



The above diagram highlights the significant increase in the population in Halton between the years of 1991 and the forecast growth up to 2040. The increase from a low point in 2000 is dramatic and the rate of increase has more than made up for the dramatic loss of population up to that point. This was a particular Merseyside (and Northern England) trend at that point and the reversal shows no signs of abating soon.

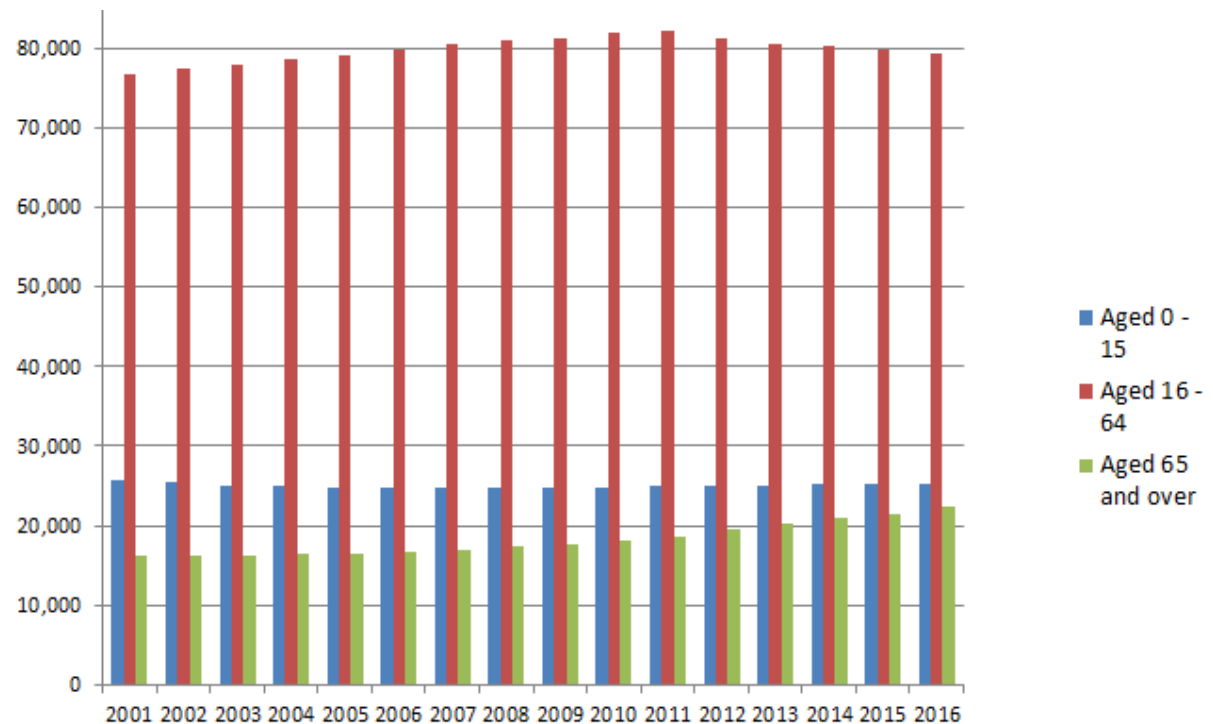
### Halton 16+ Population





The 16 plus population increase virtually mirrors the overall population growth, however what these figures do not show is the age group changes in the population and the overall increase in population at the older end of the population pyramid and a weak replacement population. This is resulting in a general aging of the population for Halton with implications on the labour market and service provision, both private and public sector. The following diagram represents this point graphically.

### Halton Population Age Structure



When observed closely the change in the over 65s and under 16 population is quite stark. As too is the change in the population aged over 85(not illustrated on the diagram) in Halton which has increased from approximately 1,000 in 1991 and is forecast to stand at 6,000 by the year 2040. 0 – 5 year population at this time is expected to taper off from 10,000 to 7,000. Taking these extremes of the population allows us to start to quantify this impact on service provision.

### Conclusions

1. The population of Halton has recovered from the steep decline in the 1990s and, indeed, has replaced that lost population.
2. The major challenge with population is the aging of the population and the potential impact on the labour market and service provision

3. Training of the unproductive workforce and migration are the only two solutions to mitigate the problems that this will create for the labour market.

### Section 3 Labour Market and Skills

#### Economic Activity

OF the total population there are 60,700 who are economically active which equates to 75.1% of the population. This is slightly lower than the North West and Great Britain figures of 76.0% and 78.0% respectively.

There are 22.6% of males who are economically inactive in Halton and this compares with 16.8% regionally and 19.2% nationally. 27% of females economically inactive in Halton compared to 27.1% in the North West and nationally 27.8% of females are economically inactive. This is a total figure of 19,600 people in Halton who are aged 16 – 64 who are economically inactive.

#### In employment

Of 60,700 economically active in Halton 58,100 are in employment. This equates to 71.8% of the total which is slightly lower than the North West and Great Britain figures at 72.4% 74.4% respectively.

#### Self employed

Self-employment is one area where Halton stands out compared to the region and nationally and there are 5,900 people in Halton who are declared and registered as self-employed, which amounts to 7.0% of the working population and is significantly lower than the percentage in the North West of 9.1% and 10.6% respectively. This reflects the historic dominance of a small number of large businesses on the economy of Halton.

Halton is impacted by two distinct variables, the historical dominance of large employers and the fact that there are still some large employers dominating the economy. There are still relatively low levels of self-employment in Halton, but this is steadily increasing. There are 19,600 people of traditional working age who are economically inactive in Halton. 30.7% of females and 32.7% of males who are economically inactive have indicated that they want a job.

#### Occupations of those economically active 2017

	Halton		Great Britain		North West	
	Number	%	Number	%	Number	%

	Halton		Great Britain		North West	
1: managers, directors and senior officials	4,300	7.4	3,302,600	10.7	327,900	9.8
2: professional occupations	7,700	13.3	6,270,200	20.3	623,200	18.6
3: associate prof & tech occupations	8,200	14.0	4,398,300	14.3	456,400	13.6
4: administrative and secretarial occupations	7,000	12.1	3,165,400	10.3	359,700	10.7
5: skilled trades occupations	5,800	9.9	3,184,700	10.3	347,200	10.4
6: caring, leisure and other service occupations	6,000	10.3	2,835,900	9.2	333,700	10.0
7: sales and customer service occupations	5,600	9.6	2,326,400	7.5	286,200	8.5
8: process, plant and machine operatives	6,800	11.7	1,957,000	6.3	233,600	7.0
9: elementary occupations	6,300	10.8	3,267,800	10.6	374,500	11.2

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There are a number of points that stand out on the above table and the most major point is the skewing of the occupation profile in Halton to the occupations that require a lower entry level qualification and experience. There are far fewer people as a nation (as a proportion of the total workforce) employed as managers, directors and senior officials and professional occupations. Associate professionals and technical occupations appear at parity with the rest of the country although there has been a proliferation of new businesses in this sector in Halton, possibly heralding a greater propensity for self-employment and entrepreneurship in the area. This could be driven (in part) by people declaring themselves a self-employed as a result of benefit rule changes and it can be (potentially) easier to claim tax credits rather than Universal Credit.

## Inactivity

The previous two pages give us a good indication about what is happening with those residents who are economically active, and what proportion of inactive residents are looking to be economically active. In this section, we assess what those who are inactive are doing.

### Patterns of economic inactivity

	Halton (level)	Halton (%)	North West (%)	Great Britain (%)
Total	19,600	24.9	24.0	22.0
Student	4,100	21.2	24.2	26.8
looking after family/home	4,000	20.3	23.2	24.5
long-term sick	6,900	35.1	26.7	22.0
Retired	3,000	15.3	13.9	13.5
Other	1,100	5.5	9.1	10.9
wants a job	6,200	31.6	23.2	23.5
does not want a job	13,400	68.4	76.8	76.5

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The one fact that stands out about Halton is the high levels of long-term sick in the area, compared both regionally and nationally. What also appears to stand out is the lower levels of inactivity through study, which lies well below the regional and national averages. Significantly, more of Halton's resident who economically inactive want a job compared to the regional and national averages.

### Workless Households

	Halton	North West	Great Britain
Number of Workless Households	8,800	422,200	3,043,300
Percentage of Households that are Workless	20.9	18.0	15.1

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The number of workless households in Halton is slightly higher than the regional average but much higher than the national average as of 2016.

### Highest level of qualification

Qualifications (Jan 2016-Dec 2016)				
	Halton (level)	Halton (%)	North West (%)	Great Britain (%)
NVQ4 and above	20,900	26.6	34.0	38.2
NVQ3 and above	39,800	50.8	53.7	56.9
NVQ2 and above	55,700	71.1	73.0	74.3
NVQ1 and above	65,000	82.9	84.8	85.3
Other qualifications	5,300	6.7	5.7	6.6
No qualifications	8,200	10.4	9.5	8.0

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The number of people qualified to NVQ level 4 and above is much lower in Halton than the regional and the national figure, but may only reflect that the suitability of qualification as opposed to the level of qualification is important for local employers. Certainly anecdotal feedback from employers suggests that this is the case and should probably be good news for the apprenticeship programme over the longer term.

A full 12% behind the national figure at NVQ level 4 and above is something nevertheless that needs to be discussed.

### Earnings

#### Earnings by place of residence

Earnings by place of residence (2017)			
	Halton (pounds)	North West (pounds)	Great Britain (pounds)
Full-time workers	497.1	514.5	552.7

Male full-time workers	543.5	550.9	594.2
Female full-time workers	428.6	464.6	494.4
Hourly pay - excluding overtime			
Full-time workers	12.61	12.99	14.00
Male full-time workers	13.13	13.45	14.56
Female full-time workers	11.46	12.38	13.18

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Earnings in Halton are split into two. The first is the earning by place of residence. And to be clear this is people who live in Halton but may work in Halton but may work in another area. The Table shows a disparity with the earnings of male and female full time workers. In fact there is approximately 10% difference in the earnings, borne out by the gender pay gap figures as a whole across the borough.

#### Earnings by place of work

Earnings by place of work (2017)			
	Halton (pounds)	North West (pounds)	Great Britain (pounds)
Gross weekly pay			
Full-time workers	562.0	514.0	552.3
Male full-time workers	601.6	550.1	594.1
Female full-time workers	460.7	464.6	494.0
Hourly pay - excluding overtime			
Full-time workers	13.67	12.99	13.99
Male full-time workers	14.18	13.42	14.56
Female full-time workers	12.14	12.41	13.17

Source: ONS annual survey of hours and earnings - workplace analysis

By comparing the two tables it is clear the disparity that exists between those who live in Halton and those who come into Halton to work. What is very clear is that as a place to work, Halton is a place where male wages are above the national average but female rates are significantly below the national average.

There is evidence of a rebalancing of the wage rates earned by women over previous years. Indeed over the last decade female wage rates for full time employment have increased by more than 25%, which in the context of pay settlements and the state of the economy over the last decade goes against the grain of other pay settlements. There is still a long way to go to lower the disparity between male and female wage rates. It should be noted that full time earnings in Halton average £497.1 whereas part time earnings average £154.8.

### Wavehill Employer Skills Survey Findings

57% of employers reported that vacancies were hard to fill in Halton because either people applying for the posts did not have the required skills to meet the basic requirements of the post or that applicants did not have the required attitude, motivation or personality to fulfil the roles advertised. This is an area that we need to address because whereas some of this may be judgements and bias we can motivate people and change attitudes to work.

Further to the above, employers reported a number of weaknesses in Halton that were holding back potential candidates from taking advantage of potential employment opportunities. The following table highlights employers' opinions and it is clear from the table that technical skills, general business knowledge and work readiness are the reasons stated as preventing candidates from securing employment, according to the employer skill survey. Collectively, there is need for intervention to ensure that local people are technically skilled, willing, and able to take advantage of employment opportunities presented by businesses in Halton.

### Reasons why vacancies are hard to fill by local authority area

	Technical skills specific to the sector/role	Leadership & management	General business skills / knowledge	General employability and work readiness	Interpersonal skills	None of the above
Halton	54%	11%	29%	38%	21%	11%
Knowsley	45%	9%	15%	27%	15%	12%
Liverpool	49%	10%	19%	28%	12%	20%

Sefton	53%	11%	17%	29%	15%	24%
St. Helens	40%	6%	8%	33%	19%	35%
Wirral	41%	11%	13%	39%	27%	24%

### **Labour Market and Skills Conclusions**

1. The skill requirement of employers, and the skills possessed by local people has radically changed in recent years and is set to continue. This will drive both labour supply and training provision for the coming decades and individual and organisational flexibility will be the key to competitiveness and growth.
2. Albeit partially redressed in recent years, the differentiation between the Halton workforce and residential earning capacity needs to be permanently kept under scrutiny and measures put in place to ensure that this disparity is mitigated through training and relevant experience.
3. The level of education in Halton of the residential population in Halton needs to be addressed and made relevant. Intelligence suggests that local people are not accessing employment opportunities at premium employment sites (e.g. Daresbury) and this needs to be addressed in order to ensure the local competitiveness and sustainability.
4. Collectively, there is need for intervention to ensure that local people have technical skills, are willing and able to take advantage of employment opportunities presented by businesses in Halton.



## Section 4 Business

### Employment Base

According to the latest data from the Business Register and Employment Survey (BRES), total employment in Halton was around 56,590 people in employment in 2016. Halton accounts for nearly 4% of all jobs in Liverpool City Region (LCR, 1.506million). Since 2010, the borough has gained close to 1,000 business units – representing growth of nearly 26% - and reflecting a more positive economic environment than the headline figures might suggest. However, elements of this may include elements of larger businesses outsourcing operations and individuals using self-employment as a route out of unemployment, regardless of success. (Is the latter likely given Halton’s low self-employment levels?)

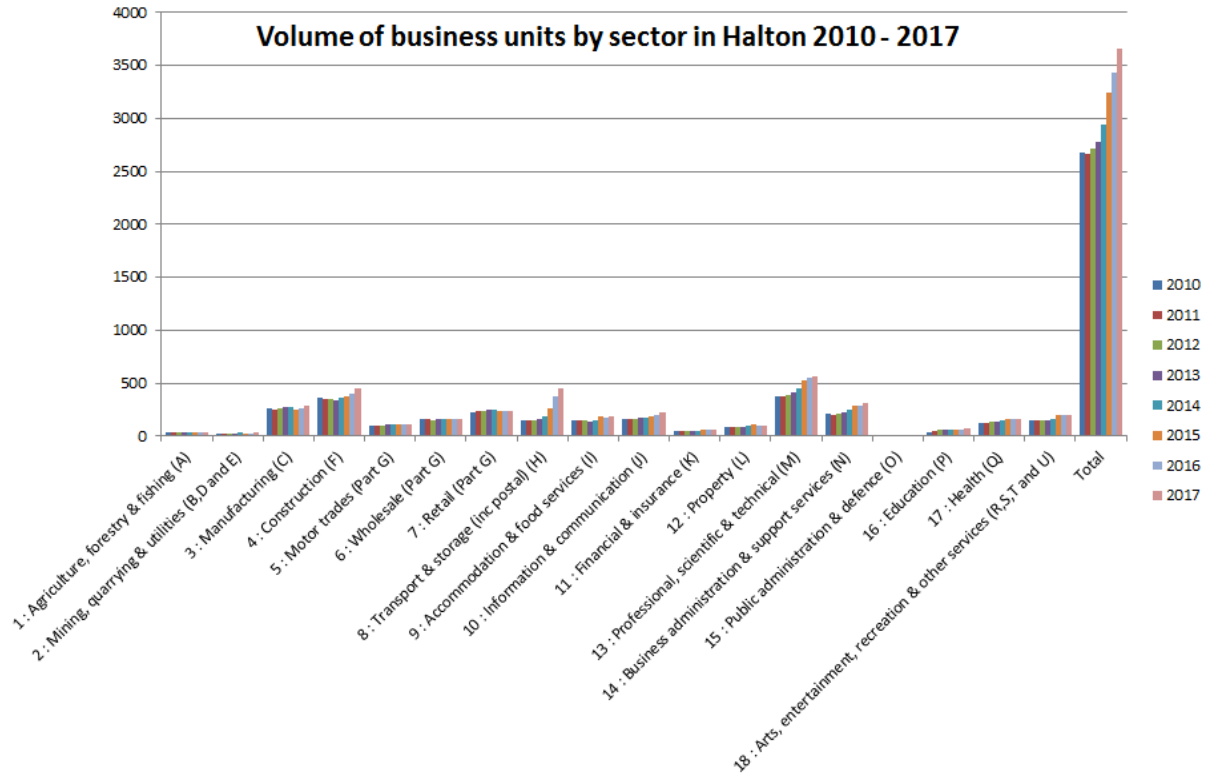
Table 1 displays employment figures and changes for 2010-16, breaking the numbers down by sector. In 2016, the largest sector in Halton (based on number of business units) was the professional, scientific and technical sector. There are 7,000 manufacturing jobs in Halton and this accounts for 12.0% of all employment in the area – figures do show, however, that this figure has dropped from 8,000 in 2015.

The second largest sector in Halton is Transport and Storage with 455 business units and 6,000 jobs. Construction performs well with the number of business units and jobs. However over time we will be able to calculate to what degree these figures were skewed by the construction of the Mersey Gateway Bridge.

<b>Table 1: Change in employees in employment between 2015 and 2016</b>	<u>2015</u>	<u>2016</u>
1 : Agriculture, forestry & fishing (A)	30	40
2 : Mining, quarrying & utilities (B,D and E)	1,000	1,000
3 : Manufacturing (C)	8,000	7,000
4 : Construction (F)	3,000	3,000
5 : Motor trades (Part G)	700	700
6 : Wholesale (Part G)	3,000	3,500
7 : Retail (Part G)	5,000	5,000
8 : Transport & storage (inc postal) (H)	5,000	6,000
9 : Accommodation & food services (I)	3,000	3,000
10 : Information & communication (J)	3,000	3,000
11 : Financial & insurance (K)	450	450
12 : Property (L)	1,250	900
13 : Professional, scientific & technical (M)	4,500	5,000
14 : Business administration & support services (N)	6,000	5,000
15 : Public administration & defence (O)	1,750	2,000
16 : Education (P)	3,500	4,000
17 : Health (Q)	5,000	5,000
18 : Arts, entertainment, recreation & other services (R,S,T and	2,500	2,000

U)		
<b>Column Total</b>	<b>56,680</b>	<b>56,590</b>

Source: BRES / Nomis December 2017



The above bar chart not only visually represents the significant overall increase in business units in Halton but also highlights the more dynamic sectors of 8, 13 and 14. The former reflects a change in patterns of employment and self-employment in the sector but the latter reflects emergence if highly skilled technological sector(s) in Halton.

The main sectors of concern have experienced a sharp decline in employment over a 12 month period and decline between the surveys. However, the drop in employment in manufacturing is counter acted by an increase in employment in transport and storage. We know a large part of the latter is due to the opening of Lidl and B and M Bargains and the loss of manufacturing employment. This represents a transition of the employment composition of Halton. Alstom (recent significant investment) will account for a growth in employment over future surveys.

Overall Employment is relatively static for absolute numbers. The most encouraging source of employment growth is the increase in numbers in the Professional, scientific & technical occupations. The importance of this sector cannot be overstated especially where the contribution to GVA, productivity and growth is concerned.

## Business Units

**Table 2 number of businesses in Halton by sector**

Industry	2010	2011	2012	2013	2014	2015	2016	2017	Percentage Increase
1 : Agriculture, forestry & fishing (A)	30	30	30	35	30	30	35	35	16.67
2 : Mining, quarrying & utilities (B,D and E)	25	20	25	25	30	25	25	30	20.00
3 : Manufacturing (C)	260	255	260	270	275	255	265	290	11.54
4 : Construction (F)	365	350	350	335	360	380	400	450	23.29
5 : Motor trades (Part G)	105	105	100	110	110	115	110	110	4.76
6 : Wholesale (Part G)	160	160	150	160	165	165	160	165	3.13
7 : Retail (Part G)	230	240	235	250	245	235	235	240	4.35
8 : Transport & storage (inc postal) (H)	150	145	155	160	190	265	380	445	196.67
9 : Accommodation & food services (I)	155	145	155	140	155	185	180	185	19.35
10 : Information & communication (J)	165	165	165	175	170	185	195	220	33.33
11 : Financial & insurance (K)	50	50	50	50	50	60	60	60	20.00
12 : Property (L)	80	80	85	90	100	110	105	100	25.00
13 : Professional, scientific & technical (M)	375	375	390	415	455	525	555	570	52.00
14 : Business administration & support	210	205	215	220	245	290	290	310	47.62

Industry	2010	2011	2012	2013	2014	2015	2016	2017	Percentage Increase
services (N)									
15 : Public administration & defence (O)	0	0	0	0	0	0	5	5	N/a
16 : Education (P)	40	50	55	55	60	60	60	70	75.00
17 : Health (Q)	120	130	140	140	145	160	165	165	37.50
18 : Arts, entertainment, recreation & other services (R,S,T and U)	155	145	145	150	160	195	205	205	32.26
<b>Total</b>	<b>2,675</b>	<b>2,660</b>	<b>2,715</b>	<b>2,775</b>	<b>2,945</b>	<b>3,240</b>	<b>3,430</b>	<b>3,660</b>	36.82

(Please note that all numbers are rounded to the nearest 5).

Table 2 shows the number of businesses in Halton by sector, drawing on information from the Inter-Departmental Business Register (IDBR). As of 2016 there were 3660 businesses in the borough, meaning Halton accounts for approximately 8.7% of LCR's business base (41,695). This is significantly higher than Halton's share of the LCR population – 3.8%.

The largest concentration of businesses in Halton is in professional, scientific & technical with 570 companies – accounting for 15.5% of the business base. This is well above the figures for LCR and GB. There are also large number of businesses in the transport and storage sector (445) reflecting a significant increase of nearly 200% over the 7 years that that the figures are available to us.

Construction accounts for a large number of business units and the impact of the completion of the Mersey Gateway Bridge will be closely monitored over the coming period.

A further sector (and one where traditionally Halton may not be viewed as having critical mass) is business administrative and support services. What is remarkable is the outstanding growth in business in Halton between 2017 generally, but business, administrative and support services is the forecast area of business growth nationally and it is reassuring that recent trends reflect this.

In terms of the size of businesses operating in Halton, the borough has a similar distribution when compared to LCR and the UK. Figure 3 shows the breakdown of the business base according to number of employees. The majority (85.8%) of

businesses are micro, with 0-9 employees. This is slightly lower than the LCR (88. %) and the UK more generally (89.6%). At the opposite end of the size scale, 0.54% of companies in Halton have 250 or more employees, slightly higher trends across LCR and the UK.

**Figure 3: Business size, 2017**

<b>Employment Size band</b>	<b>Halton</b>	<b>Liverpool City Region</b>	<b>England</b>
Total	3,660	41,695	2,320,885
Micro (0 to 9)	85.79235	88.00815	89.57359
Small (10 to 49)	10.92896	9.785346	8.532521
Medium-sized (50 to 249)	2.73224	1.822761	1.522264
Large (250+)	0.546448	0.383739	0.37141

Source: Inter Departmental Business Register (IDBR), 2017

There are several key private sector employers in Halton, which are highlighted in Table 2, the chemical firm Inovyn is based in Halton and as the largest vinyl production and chemical company in the UK and provides a major source of employment in the borough, with around 1,200 employees in its UK business.

Inovyn is a worldwide business that has a significant presence in Halton. Diageo is a drink manufacturer based in Halton, with its head office at Whitegate Industrial area plus a nearby production facility.

Other key private sector employers that are representative of the growth of the advanced manufacturing sector include Heroux Devtek (Aircraft landing gear manufacture), Sigmatex (carbon fibre specialists) and Whitfords (movement friction prevention specialists). We have a significant distribution sector, with nationally recognised brands including Freight First, Downton and Stobarts based in Halton, underpinning our strength of regional distribution significance.

A further large employer in Halton is Fresenius-Kabi, a medical nutrition, prescription and service business based in Manor Park, currently employing more than 500 people in Halton and looking to expand significantly to meet a growing demand for its products and services.

These companies and others that are driving economic growth, offer a wide range of careers to aspiring young people and the unemployed, including:

- Drivers, Customer Services, Engineers, Finance, Packaging and Food Safety at Eddie Stobarts / TESCO
- Pharmacists, dispensers, quality control and process management at Fresenius Kabi.
- A multi-award winning apprenticeship programme with professional and technical development for engineering with vocational qualifications leading to degree level and professional status through Riverside College and complements the businesses working and adding value to the Halton economy.
- Alstom is a further high profile addition to Halton in 2017, and will not only contribute to GVA over the coming years but will also provide highly paid and intensively trained employment opportunities.

We also have major public sector employers in Halton. This includes: Warrington and Halton NHS Foundation Trust; LCR Police Authority; Halton Borough Council; Riverside College; and Science and Technology Facilities Council – based in Daresbury.

Turning to business births (a technical term used by ONS for starts) and deaths (a technical term used by ONS for businesses ceasing trading), there were 510 new businesses started in Halton in 2014, a slight decrease of 10 (0.2%) on the 520 business births in 2013, as shown in Figure 5. This was a far more positive trend than that highlighted in previous years, when Halton was still suffering from the effects of the downturn and business deaths were surpassing births.

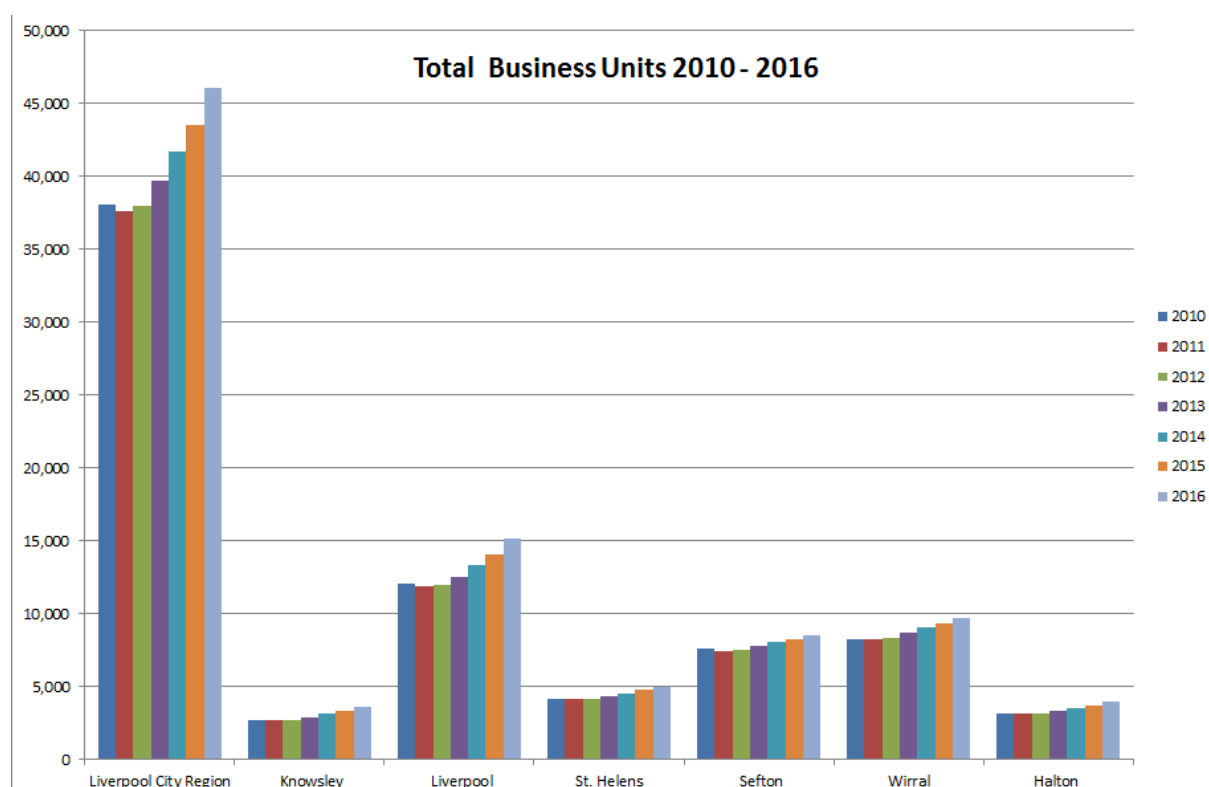
Business deaths increased by only 1 % (15) in 2014 compared to 2013. This shift in births and deaths saw an overall net increase in the number of businesses in Halton of 180 in 2014, compared to a net decrease in the years up to 2012, since then the trend has been positive.

Halton has a rate of business start-ups at parity with the Liverpool City Region, however the business death rates are much lower resulting in a healthy net increase in the business stock.

It is important to note that the business start-up rate increased strongly between 2012 and 2014 indicating a continuing recovery from the effects of the economic downturn, restructuring of employment patterns and modern business models focusing on outsourcing.

## Business Stock 2010 - 2016

	2010	2011	2012	2013	2014	2015	2016
ENGLAND	2,046,310	2,040,980	2,070,400	2,140,985	2,235,345	2,348,065	2,499,060
LCR	38,055	37,605	37,975	39,690	41,695	43,530	46,045
Knowsley	2,695	2,700	2,735	2,930	3,180	3,385	3,590
Liverpool	12,050	11,910	11,955	12,570	13,310	14,055	15,180
St. Helens	4,195	4,140	4,180	4,320	4,505	4,795	5,025
Sefton	7,645	7,465	7,570	7,820	8,075	8,230	8,560
Wirral	8,295	8,250	8,355	8,720	9,090	9,355	9,685
<b>Halton</b>	<b>3,175</b>	<b>3,140</b>	<b>3,180</b>	<b>3,330</b>	<b>3,535</b>	<b>3,710</b>	<b>4,005</b>



The above diagram illustrates that the growth of the business base in Halton is both significant and steady, without any major fluctuations in the business base. This reflects the stable nature of the Halton economy and when combined with the growth in new technology sectors bodes well for the future of Halton.

Figure 5: Business births & deaths in Halton, 2010-16

Source: ONS – Business Demography, 2017

**Business Births (Starts) in the Liverpool City Region**

	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>ENGLAND</b>	<b>207,520</b>	<b>232,460</b>	<b>239,975</b>	<b>308,770</b>	<b>313,200</b>	<b>344,385</b>	<b>374,035</b>
LCR	3,885	4,360	4,675	6,555	6,195	6,755	7,050
Knowsley	300	335	380	525	550	585	550
Liverpool	1,290	1,465	1,515	2,250	2,160	2,435	2,670
St. Helens	415	450	485	640	615	725	705
Sefton	760	775	895	1,220	1,085	1,145	1,160
Wirral	815	995	1,040	1,400	1,275	1,315	1,320
<b>Halton</b>	<b>305</b>	<b>340</b>	<b>360</b>	<b>520</b>	<b>510</b>	<b>550</b>	<b>645</b>

The table shows that there is a strong performance from Halton businesses between 2010 and 2016. The 26% increase illustrates that Halton is a borough that is leading the region with enterprise performance. This correlates with the high level of GVA in the East Merseyside area.

The above table highlights the healthy level of business starts in Halton over the last 7 years where the performance has out-stripped the rest of the Liverpool City Region. What is of real significance is the doubling of the number of business births since 2010. Business success rates for those starting in 2011(5 years is the cut off point for measuring business survival rates) is 42%.

National Business Survival by sector

<b>Survival after 5 years</b>	
Production	44.7
Construction	42.2
Motor trades	42.1
Wholesale	37.7
Retail	41.9
Transport and storage (Inc. postal)	39.6
Accommodation and food services	34.6
Information and communication	49.4
Finance and insurance (Excl 6420)	43.7
Property	51.1
Professional, scientific and technical	48.5
Business administration and support services	38.5
Education	48.5



Health	54.1
Arts, entertainment, recreation and other services	45.0
<b>Total</b>	<b>44.1</b>

Figure 7: Business Survival Rates after 5 years 2010-16

Source: ONS – Business Demography, 2017

Figure 7 illustrates how a business fares after trading for 5 years. It probably only reflects ‘received wisdom’ from the business support community but the reliability of the Health, Property and Professional, Scientific and Technical sectors shines through compared to the more difficult sectors including accommodation and food services.

### Main Markets

The following table summarises the main markets served as part of the sample interviewed by Wavehill in 2018. The results partly reinforce existing knowledge about the business base in Halton, but in black and white the figures set Halton out from our contemporaries within the LCR by highlighting the primary markets of businesses in each borough.

Halton businesses export more than double the average local authority in the Liverpool City Region and this reflects the historic reasons for businesses being based in Halton and their continued expansion into new markets. By historic we mean the legacy of both the chemicals industry and the work of the Commission for New Towns.

Exporting outside a geographical area provides an injection of cash (in the form of turnover) which in turn facilitates economic growth and development as part of a natural business expansion process. We now know that retention and continual retraining of staff is a major factor in contributing to competitiveness. Therefore, how that injection of cash is used (training, dividends, staff development) can further develop and grow the economy for the benefit of all.

	Liverpool City Region	UK	Outside UK
Wirral	67%	22%	12%
St Helens	57%	33%	10%
Sefton	67%	27%	5%
Liverpool	59%	31%	9%
Knowsley	54%	40%	6%

Halton	37%	41%	22%
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### **Business Conclusions**

1. The economy of Halton has very successfully restructured over recent decades from a borough that was highly dependent upon a small number of large employers, to a much more diverse business base with an abundance of self-employment. We need to ensure that this pattern continues to be harnessed.
2. The number of businesses in Halton is now higher than at any point in the Borough's history and needs to be matched by equally high levels of wage rates for the residential population, not just the employed workforce.
3. Survival rates for business in Halton is high and the long term strategy appears to be paying dividends with high survival rates in targeted sectors, especially Professional, Scientific and Technical sector.
4. We now know that retention and continual retraining of staff is a major factor in contributing to competitiveness. Therefore, how that injection of cash is used (training, dividends, staff development) can further develop and grow the economy for the benefit of all. We will formulate a plan to consider how this can best be done.

## 7. Impact of Future Developments

The most certain aspect of the coming years is its uncertainty. One lesson from recent history is that tried and tested forecasting models are now overly-scrutinised and considered predictions (which they are not), and leaves us with a lesser valued economic tool. In order to secure the best future for Halton we must use known and verified sources of information and not rely on over-bearing erroneous opinion.

Within this section we highlight both knowns and known-unknowns, neither recognising nor dismissing any as absolutes.

They are not listed in any particular order of priority:

- **BREXIT**

The uncertainty created by BREXIT is causing nervousness among the business community and there is no clear plan about how trading relations with the European Union and the rest of the world will look following March 29 2019.

- **Free Trade Agreements and Looming international trade war**

Trade wars are breaking out chiefly between the United States of America and the European Union, and the United States of America and the European Union. The world has moved towards free trade in blocks for more than 2 decades so it is an unknown quantity how these trade wars will impact on the economy. One thing we do know is that barriers to trade limit it, the quantum of that limit is yet to be known

- **Weaker growth in China**

The double digit growth of China is slowing up and China has been a major economic catalyst in recent decades, becoming the second largest economy in the world from a position of relative obscurity.

- **Mersey Gateway Bridge – Impact from opening**

We don't yet know the impact of the Mersey Gateway until the first full year figures have been analysed and released.

- **City Deal**

£300 million over the next 10 years for the City Region for skills, economic development and transport projects and it is yet to be determined how these funds will be allocated within the City Region. Projects meeting the Metro Mayor's priorities will have a better chance of receiving funding.

- **5G Roll Out**

5g will herald an almost perfect mobile network for the transfer and use of data in business and will technological developments there is an early adopter premium and an almost certain dividend to the economy. Harnessing this opportunity is a priority for all technology and data driven businesses in the mobile era.

- Austerity

Whether Austerity is here to stay is speculated upon but the leakage of funds from the public sector since 2010 has made a significant impact on the shape of public services and how services are delivered, and in some cases not at all. Over the next two years, local authorities (in particular) will be gearing up to operating under a new regime of retained business rates and minimal revenue grant from central government. The impact of this is unknown!

- Muller investigation

The potential impeachment of the President of the United States of America looks a possibility, or at least a number of people involved with him. Whereas the impact of a successful prosecution would make limited impact on the political situation (due to the constitutional succession) it could cause market-driven uncertainty.

- Emerging Markets

See Brexit

- Interest Rates

We have seen a rate rise already and a further one (if not two) are expected in 2018. The reason to raise interest rates is to cool the economy and allow for readjustment.

## Appendix 2

### Halton 2030 Baseline and Future Targets

This document is designed to articulate the ambitions of Halton Council and partners over the coming 5 years, highlight the baseline position with a number of crucial indicators, present which actions we are going to take to achieve our ambitions, and highlight our future targets.

The vision for Halton Tomorrow is:

“By 2027 Halton’s residents will have access to good quality housing, excellent education, and suitable jobs in a strong and sustainable local economy; and Halton’s businesses will have the skills, investment-environment and infrastructure to achieve their goals. Joined by a river, Halton will be a place people enjoy, with excellent access to vibrant local town, shopping and entertainment centres.”

This initial baseline and monitoring plan will take us up to 2022 approximately half way through the timescale of this programme and if the targets established are achieved then progress will need to be rapid.

The work is split into:

1. The Economic Overview. The major factors that are driving the Halton economy (macro-economic factors) setting the impact of these in the local context. External shocks are the most significant uncontrolled factor impacting upon the economy. Key themes include, Employment and Jobs, Skills, Population, Land and Infrastructure conclude in future prospects for Halton.
2. The Resident Population. We have analysed the population of Halton, the Liverpool City Region, and the country, assessing the changes in demographics and gaining an understanding about how this will have an impact on service provision in coming years.
3. Enterprise and Jobs. We have analysed patterns of change in the labour market over recent years, and assessed future demand for skills and provision of employment. This provides an understanding of how to direct and allocate resources in order to increase the number (and quality) of jobs in Halton, and increase the number, of self-employed – both factors in driving competitiveness and building a strong economy.
4. Skills. An assessment has been completed comparing the skills demands from employers in Halton with the labour supply of the resident population. The focus on resident population is because this is where we need to target interventions to ensure that local people benefit from the opportunities in the future economy.
5. Land, Infrastructure, and Transport. An assessment has been made about how well-suited the physical environment of Halton is to take advantage of the opportunities over the coming decades. This will include a comprehensive Premises study.

The baseline here is taken from the most recent annual figure available on or before 31<sup>st</sup> March 2018 for consistency purposes. In some cases this will be a week before and in other cases it may be annually, however for consistency and simplicity purposes this baseline is set in stone to make monitoring achievements as simple as possible.

Section	Indicator	Baseline(31-3-2018)	31-3-2019	31-3-2020	31-3-2021	31-3-2022
The Economic Overview	GVA (East Merseyside)  Target same as Greater Manchester – best performing urban area in the North West GM £25,351	LCR £19,319	£19,500	£19,750	£20,000	£21,250
The Economic Overview	Income difference between residents of Halton and employees in Halton  Will be based on an annual calculation	Parity of income for both workforce and residents  2018 -11.54%	Parity of income for both workforce and residents  -11.4%	Parity of income for both workforce and residents  -11.3%	Parity of income for both workforce and residents  -11.2%	Parity of income for both workforce and residents  -11.1%
The Economic Overview	Unemployment	Rates converge  5% as opposed to 4.5% 2018 model based but will be based on a fluctuating national target	4.9%	4.8%	4.7%	4.6%
Population	Population Size	Alasdair  2018 127,300	127,800	128,000	129,000	130,000
Population	Economically Active Population (16 – 64)	National Average  75.7% as opposed to 78.1% (GB)	75.8%	75.9%	76%	76.1%
Population	Long term sick at parity with North West – note Arthritis	National Average  34.4 as opposed to 21.9 Nationally	34.0%	34%	33.8%	33.6%
Population	Workless Households at Parity with	National Average				

Section	Indicator	Baseline(31-3-2018)	31-3-2019	31-3-2020	31-3-2021	31-3-2022
	Great Britain	20.9 As opposed to 15.1 nationally	20.7%	20.5%	20.3%	20.1%
Enterprise and Jobs	Level of Employment	Percentage at parity with national level 75.7% as opposed to 78.1%	75.8%	75.9	76%	76.1%
Enterprise and Jobs	Parity between national and Halton unemployment levels	Rates converge 5% as opposed to 4.5% 2018 model based but will be based on a fluctuating national target	Nominally 4.9%	Nominally 4.8%	Nominally 4.7%	Nominally 4.6%
Enterprise and Jobs	Business Stock	85.4 micros as opposed to 88.7% in the North West (0-9 employees)	85.5%	85.6%	85.7%	85.8%
Enterprise and Jobs	Employees in "target" sectors. Parity with the percentage of people employed and number of business units in sector M to be maintained above the national average - Professional, Scientific And Technical Activities.	of 8.9% as opposed to 8.6% nationally	8.9%	9%	9.1%	9.2%
Skills	Qualifications of the population at levels 1,2,3 and 4	Parity with GB and comparison details included in a separate table.	27% 51% 72% 83%	28% 52% 73% 83.5%	29% 53% 74% 84%	30% 54% 75% 84.5%
Skills	Employment in Standard Occupation Classifications 1 - 3	35.7% Halton 42.6% North West 45.6% Great	36%	37%	38%	39%

<b>Section</b>	<b>Indicator</b>	<b>Baseline(31-3-2018)</b>	<b>31-3-2019</b>	<b>31-3-2020</b>	<b>31-3-2021</b>	<b>31-3-2022</b>
		Britain				
Skills	Level of self-employment at parity with Great Britain	7.5% Halton 9.2% North West 10.6% Great Britain	7.6%	7.7%	7.8%	7.8%