Cumberland

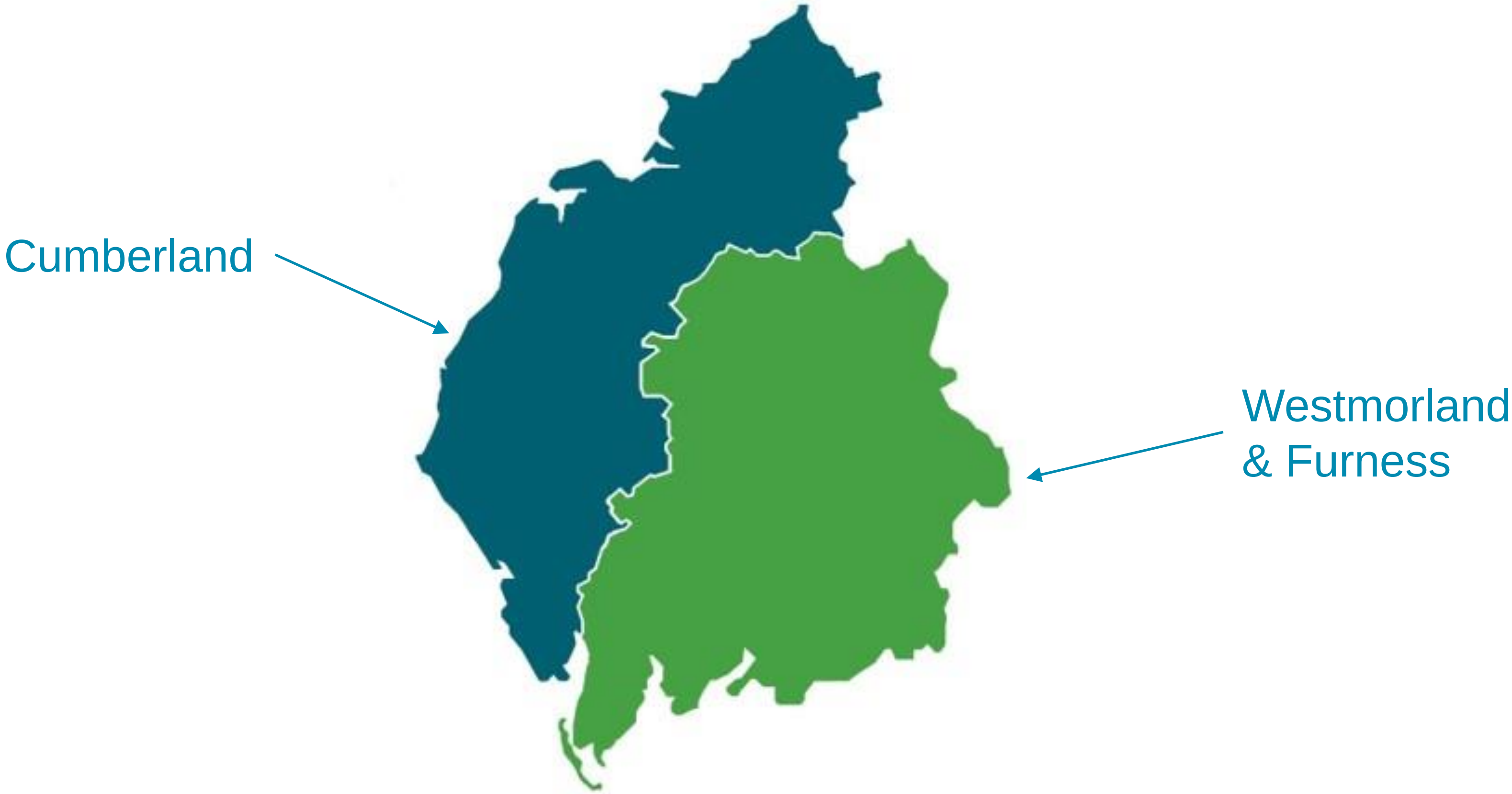
Economy Evidence Base
July 2022

prepared by

Ginny Murphy
Cumbria Intelligence Observatory

Serving the people of Cumbria

Cumberland



Contents

1. Overview

- Cumberland's geography is a key driver of its economic structure and performance.
- The £6 billion economy has particular strengths in:
  - manufacturing (including food) and nuclear decommissioning on the one hand and in
  - agriculture/land-based industries and tourism on the other.
- There are also strengths in logistics, construction, visitor economy and in public services
- 11,565 registered enterprises provide 130,000 jobs and generate £6bn in gross value added
- There are variations across the area in economic success and performance, in large part because of the location and concentration of different industrial sectors.
- At a local level some areas have a high degree of dependence on certain sectors and businesses – for example the west of the area (especially Copeland) is heavily reliant on manufacturing, particularly the nuclear sector and allied industries whereas Carlisle has significant food manufacturing and logistics sectors as well as a concentration of business services.
- Relative productivity performance is poor to middle ranking in a UK context and productivity performance is patchy across sectors (and within the area).
- Much of the relative productivity difference is caused by the industrial structure, but there is evidence of below national productivity rates in some sectors, especially in private sector services and digital/creative.
- Cumberland performs better on other economic measures such as employment rate, relatively high average wages and household incomes and affordable housing (although there are exceptions to the latter).
- However, there are pockets of deprivation particularly in the more urban areas and education performance various within the area.

2. Key challenges & opportunities

Challenges

- Patchy and underperforming levels of productivity with significant productivity gaps on all measures caused by the sectoral mix and often lower than average rates of productivity within sectors.
- Declining working age population which is predicted to continue and is counter to national trends presenting a major labour supply challenge.
- Thin pool of higher level skills spread across a large geographical area.
- Tight labour market exacerbated by the pandemic.
- An innovation ‘gap’ and weak ecosystem
- Low rate of business start-ups and enterprise.
- Few faster growing firms in both absolute and relative terms.
- Serious cold spots of worklessness and deprivation.
- Over-dependence on one or two sectors, and in some instances one major employer eg Sellafield.
- Accessibility varies; while the east of the area benefits from the M6 and West Coast Mainline, east-west and coastal connectivity faces significant reliability and resilience challenges.
- Dispersed settlements and relatively low population density in some areas creates viability challenges for public transport and its ability to link communities with employment opportunities and services.

Opportunities

- Particular sectoral strengths in nuclear, advanced manufacturing, food manufacturing, agriculture/ land based industries and tourism.
- Strategic location in the centre of northern Britain, with the Carlisle area well serviced by north-south road (M6) and rail links and east road links (A66/A69).
- Accessible location to major cities of Glasgow, Edinburgh, Newcastle, Leeds, Manchester and Liverpool, although this is more true of the Carlisle area than the west.
- Outstanding natural environment landscape providing key current and future resources for the UK in recreation, green energy and food production
- Potential site for major investment in clean energy.
- Environment which offers an outstanding quality of life.
- Strong performing vocational education and training sector.
- Strong and resilient communities.

3. Businesses, productivity & employment

- Cumberland has 11,565 registered enterprises which employ 130,000 and generate £6,010m in gross value added.
- The majority of businesses are small with 90% of registered enterprises employing fewer than 10 people (plus many more micro businesses that are unregistered).
- There is an over reliance on a small number of major businesses/organisations - 10 of which employ a quarter of employees.
- Major employers include Sellafield/NDA, 2 Sisters, Pirelli, Nestle, Carr's Group, Crown Packaging, Story Group, Iggesund, James Walker, M-Sport, Futamura, Innovia, TSP Engineering, national retailers, local government and the NHS.
- The business 'birth' rate is only 72% of UK average and is particularly low in Copeland.
- Business 3-year survival is above the UK (58% v 53%).
- Productivity is well below the national average in all areas.
- The area derives proportionately more of its GVA from manufacturing and accommodation & food services than the national average and proportionately less from high value sectors such as finance and IT & communications.
- Economic output has been falling in real terms since 2015, largely linked to the shift in activity at Sellafield from nuclear reprocessing to decommissioning.
- Data for the first year of the pandemic shows that total jobs fell less than economic output because the furlough scheme protected jobs that were not productive during lockdowns. As a result employment in Cumberland fell by 4.1% (compared to 2.9% nationally) but GVA fell by 11.8% (compared to 9.4% nationally).

3.1 Key sectors – district level

Allerdale			
Employment		Economic output	
Sector	No	Sector	£m
Retail & wholesale	7,000	Manufacturing	£332m
Manufacturing	5,000	Real estate	£301m
Accommodation & food	4,000	Retail & wholesale	£195m
Health	4,000	Health	£125m
Agriculture	3,000	Mining & quarrying	£105m

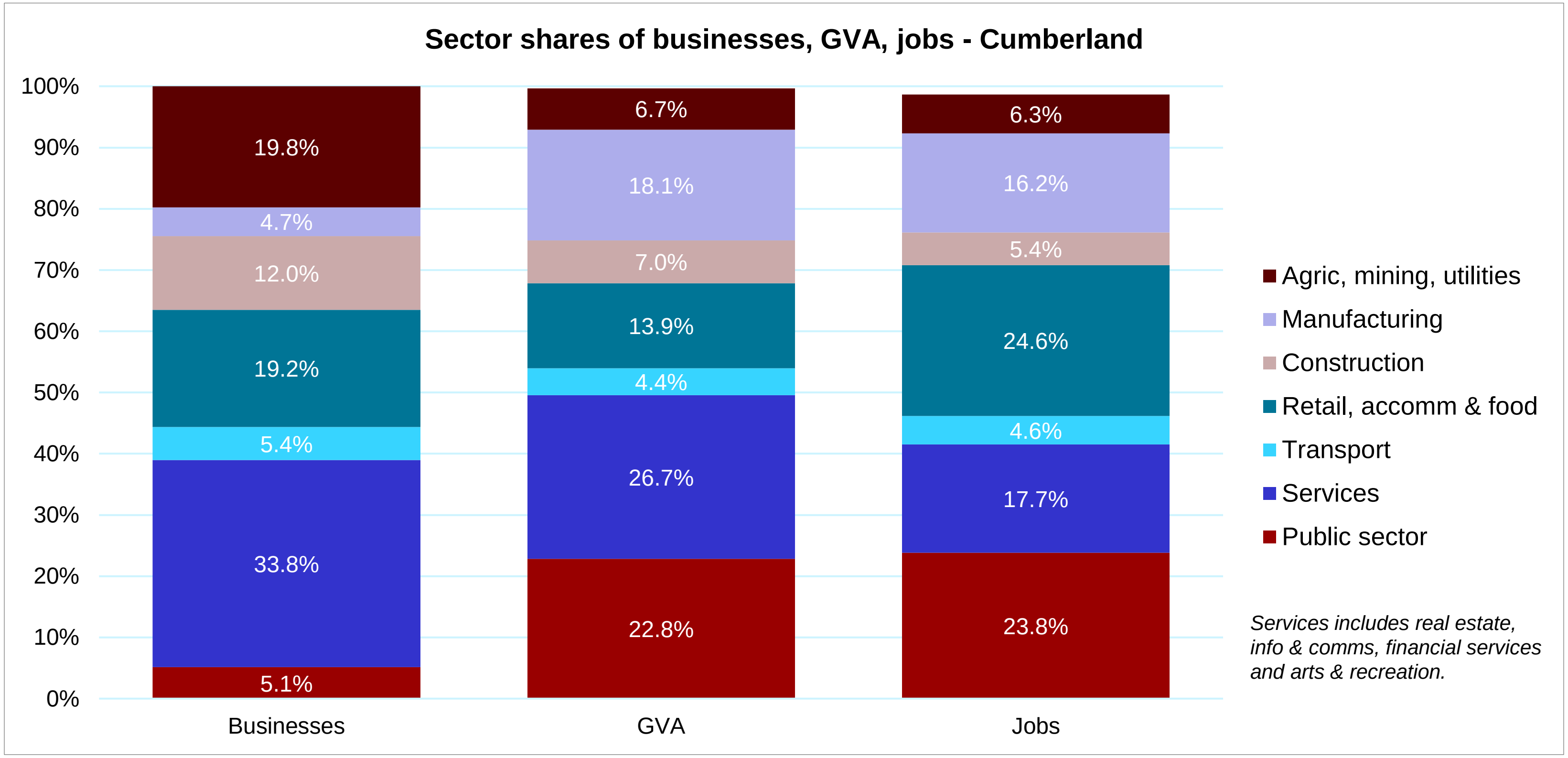
Carlisle			
Employment		Economic output	
Sector	No	Sector	£m
Retail & wholesale	12,000	Retail & wholesale	£420m
Health	10,000	Health	£395m
Manufacturing	6,000	Manufacturing	£382m
Professional services	3,500	Real estate	£365m
Admin & support services	3,500	Transport & storage	£204m

Copeland			
Employment		Economic output	
Sector	No	Sector	£m
Manufacturing	10,000	Manufacturing	£373m
Health	3,500	Real estate	£141m
Retail & wholesale	3,000	Health	£139m
Construction	2,250	Construction	£137m
Professional services	1,750	Professional services	£119m

Excluding education and public administration

Sources: ONS Business Register Employment Survey 2020 & Regional Economic Activity 2020

3.2 Sector shares (businesses, GVA, jobs)



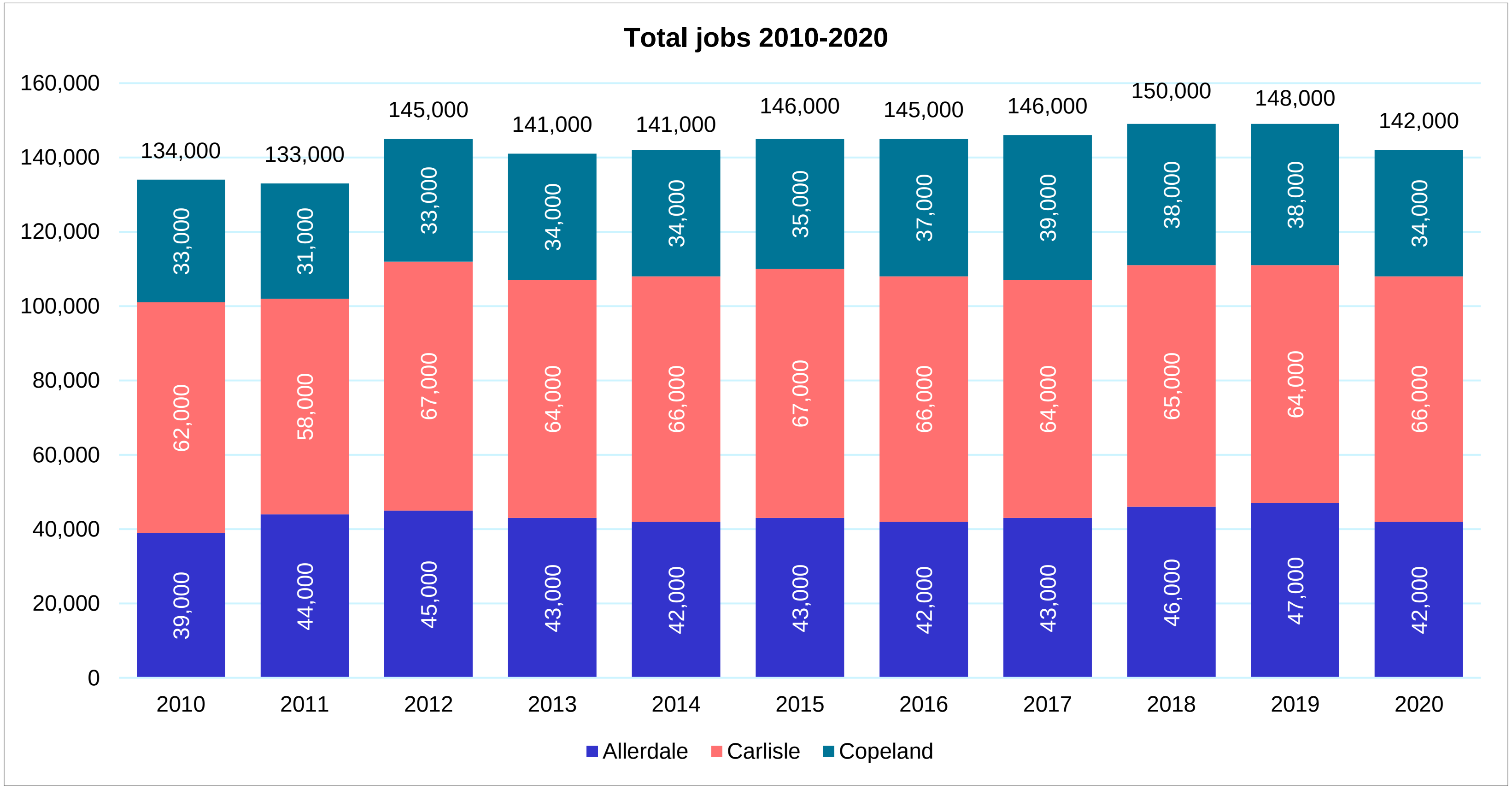
Sources: ONS Business Register Employment Survey 2020, UK Business: Size, Activity & Location 2021 & Regional Economic Activity 2020

3.3 Businesses, GVA, employment

Businesses, GVA, Employment						
	Businesses		Gross Value Added		Employment	
	No	%	£m	%	No	%
Agric, mining, utilities	2,285	19.8%	405	6.7%	8,250	6.3%
Manufacturing	545	4.7%	1,087	18.1%	21,000	16.2%
Construction	1,390	12.0%	420	7.0%	7,000	5.4%
Wholesale & retail	1,270	11.0%	694	11.5%	22,000	16.9%
Transport & storage	625	5.4%	265	4.4%	6,000	4.6%
Accomm & food services	945	8.2%	141	2.3%	10,000	7.7%
Info & communication	285	2.5%	63	1.0%	1,750	1.3%
Finance & insurance	645	5.6%	98	1.6%	1,250	1.0%
Real estate	285	2.5%	807	13.4%	1,500	1.2%
Prof, scientific & tech	1,220	10.5%	322	5.4%	7,000	5.4%
Admin & support services	805	7.0%	181	3.0%	7,000	5.4%
Public administration	85	0.7%	420	7.0%	6,000	4.6%
Education	180	1.6%	294	4.9%	8,000	6.2%
Health & social work	330	2.9%	659	11.0%	17,000	13.1%
Arts, ent & recreation	225	1.9%	56	0.9%	2,250	1.7%
Other services	445	3.8%	78	1.3%	2,250	1.7%
All industries	11,565	100.0%	6,010	100.0%	130,000	100.0%

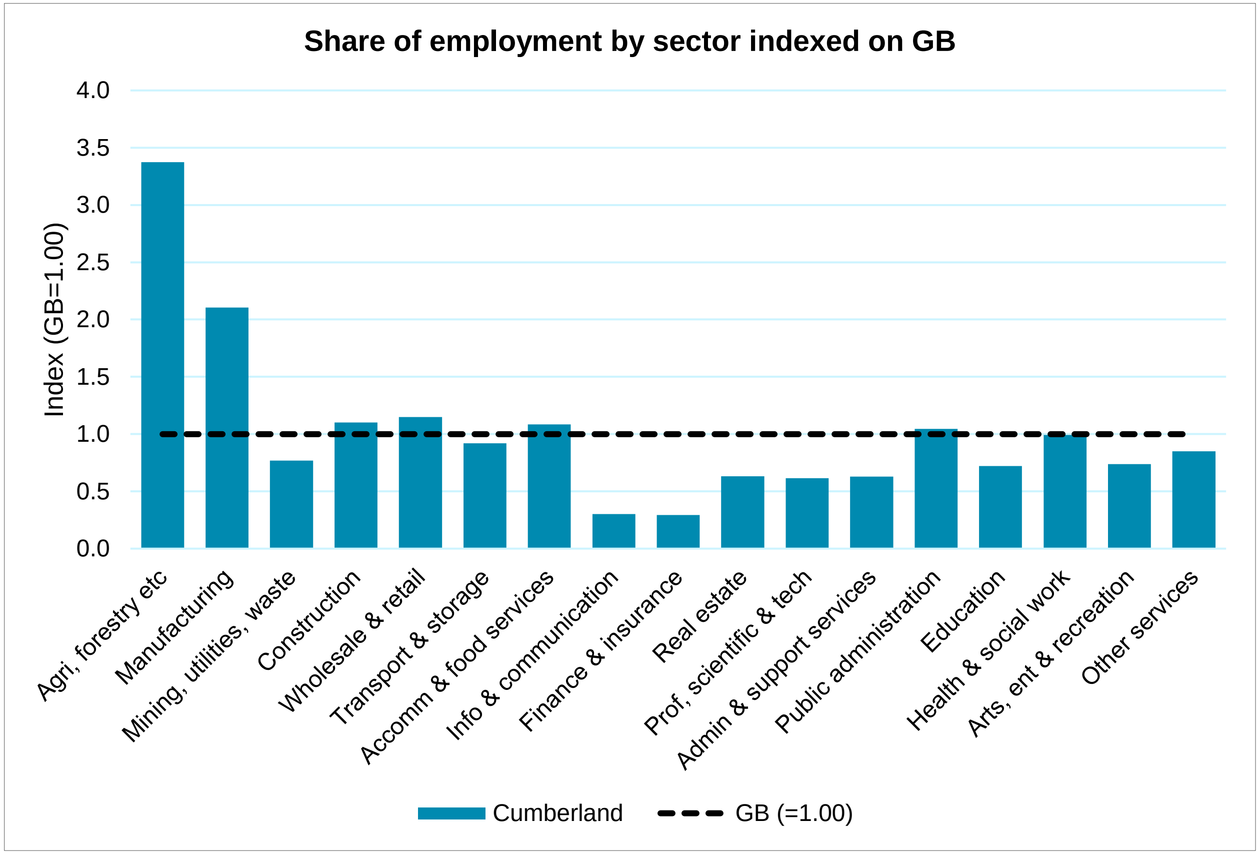
Sources: ONS Business Register Employment Survey 2020, UK Business: Size, Activity & Location 2021 & Regional Economic Activity 2020

3.4 Total jobs



Source: ONS Job Density 2020 (employee jobs, self-employed, government-supported trainees, HM Forces

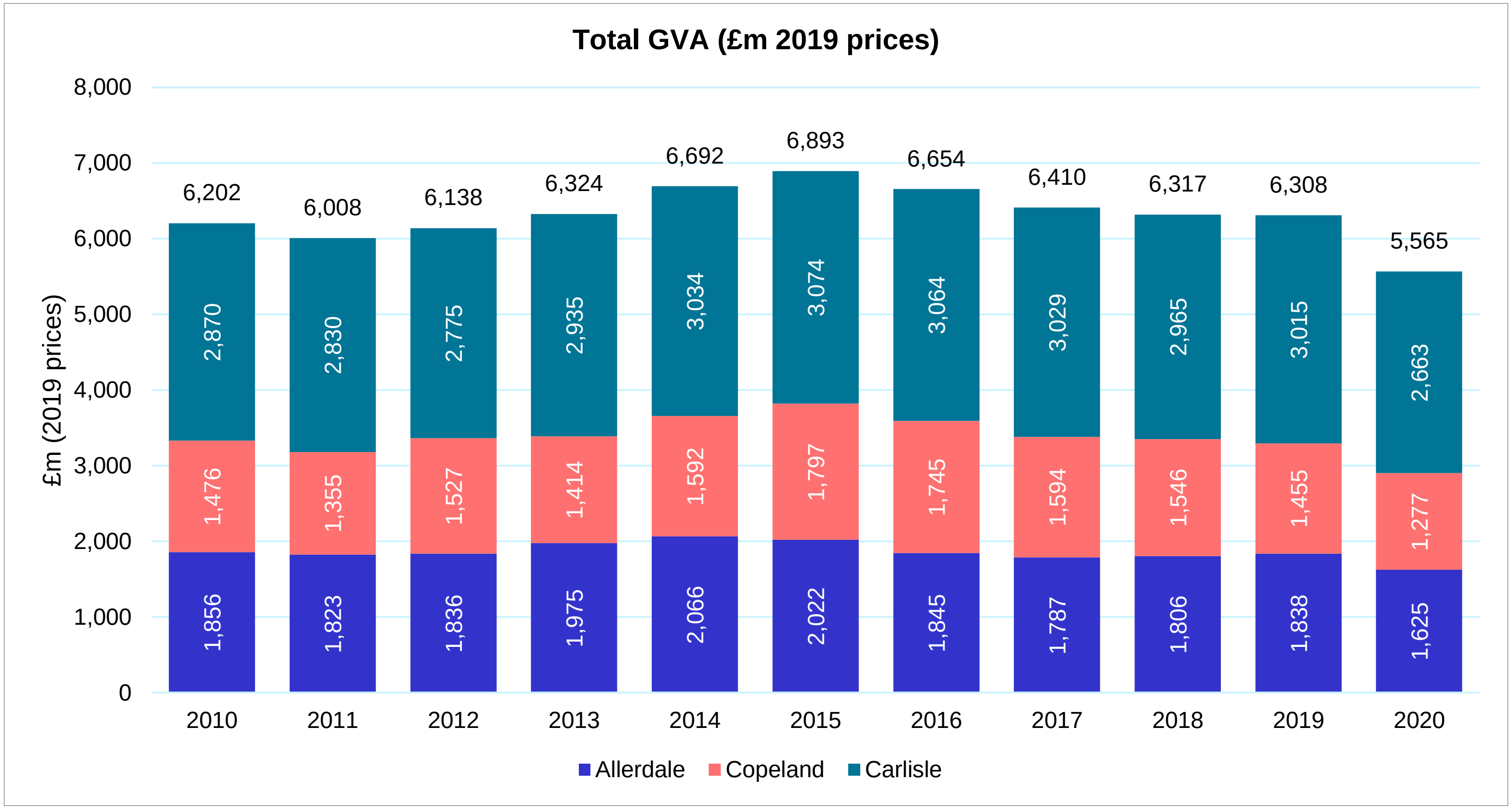
3.5 Employment structure relative to GB



- Cumberland has particular concentrations of jobs in agriculture and manufacturing relative to the national average.
- The concentration of jobs in construction, retail, transport, accommodation & food services, public admin and health are broadly similar to the national average.
- The area is significantly under-represented in high value sectors such as information & communications, finance and professional services.

Source: ONS Business Register Employment Survey 2020

3.6 Total GVA (£m)

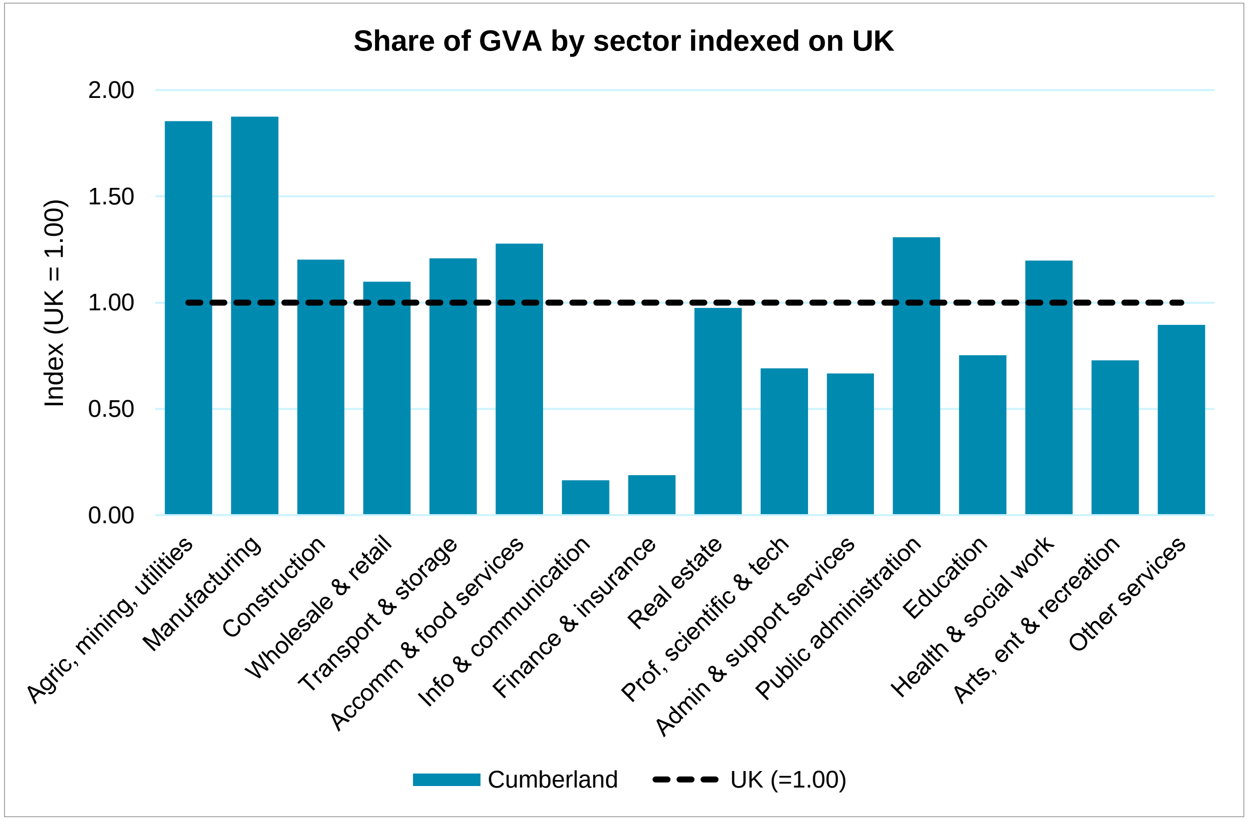


Source: ONS Regional Economic Activity 2020

Cumbria County Council

Serving the people of Cumbria

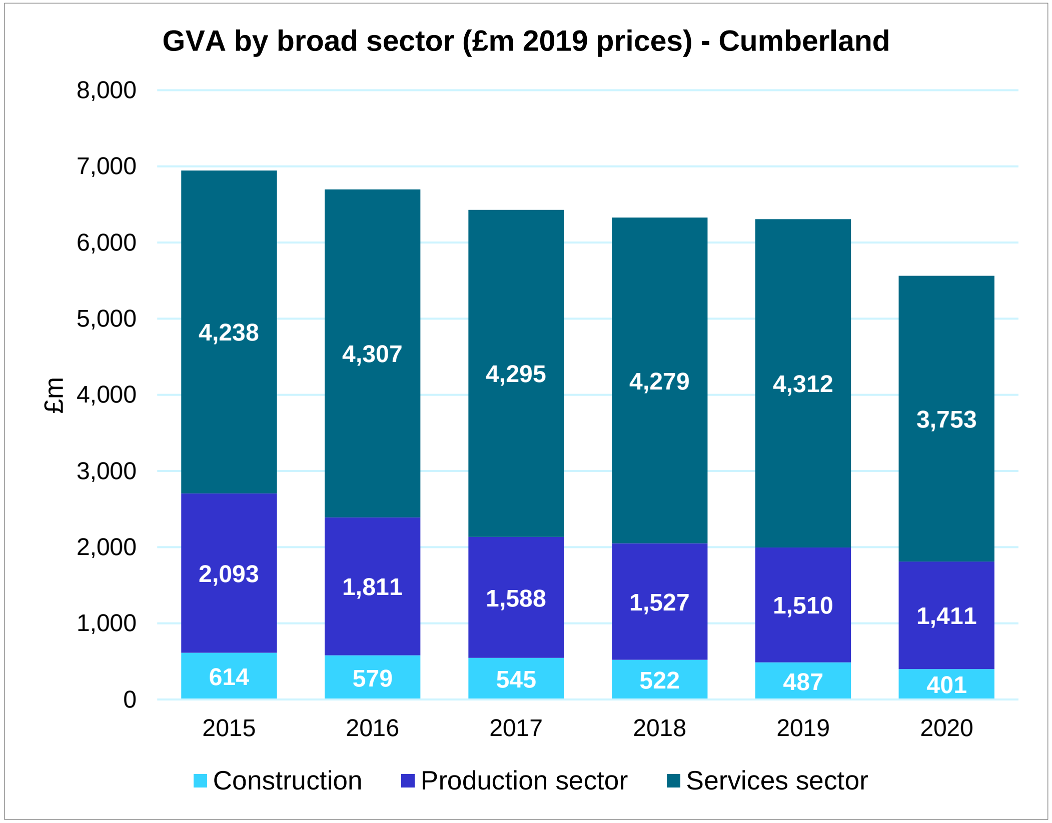
3.7 GVA structure relative to UK



- Cumberland derives proportionately more of its GVA from land based sectors and manufacturing than nationally and slightly more in several other sectors.
- This finding is partly because of the significant under-representation in high value sectors such as information & communications, finance and professional services.

Source: ONS Regional Economic Activity 2020

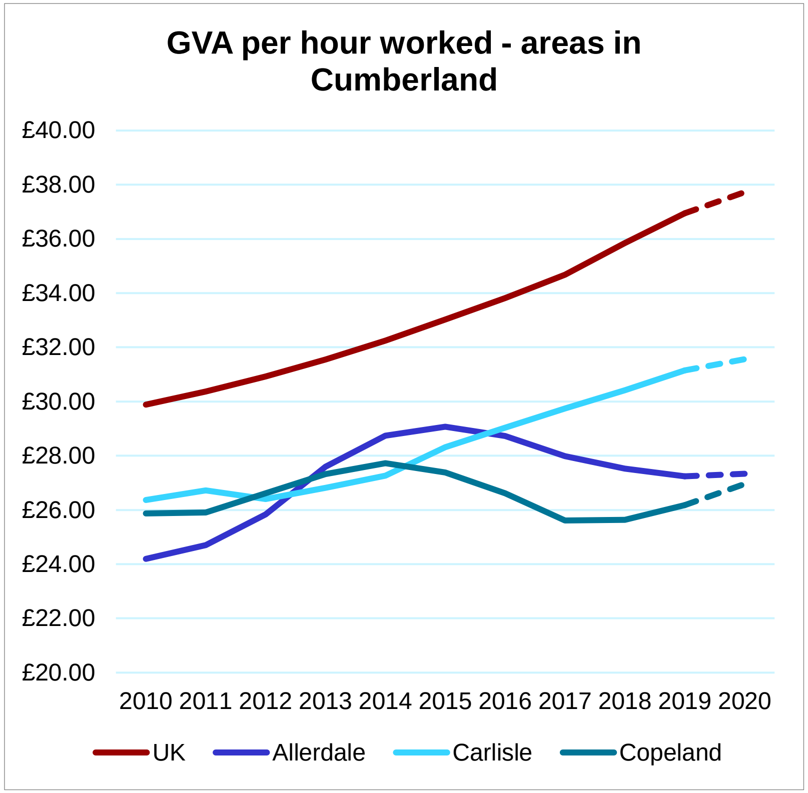
3.8 Change in GVA by broad sector (£m)



Source: ONS Regional Economic Activity 2020

- Total economic output has been falling year on year in Cumberland since 2015.
- This trend is driven mostly by declining output from the production sector, much of which is linked to the shift of operations at Sellafield from reprocessing activity to less productive decommissioning activity.
- In 2020, Cumberland's economic output fell by 12% overall, largely as a result of the pandemic which is more than the national average of 9% due to an above average fall in the services sector (13% v 9% nationally).
- In contrast the production sector fared better than nationally although this varied within Cumberland – Allerdale's production output actually grew slightly but Copeland experienced a continuation of the previous trend of declining production sector output linked to the shift in activity at Sellafield.
- Carlisle and Allerdale experienced particularly large falls in output in the construction sector relative to the national average.

3.9 Productivity



Source: ONS Subregional Productivity 2020

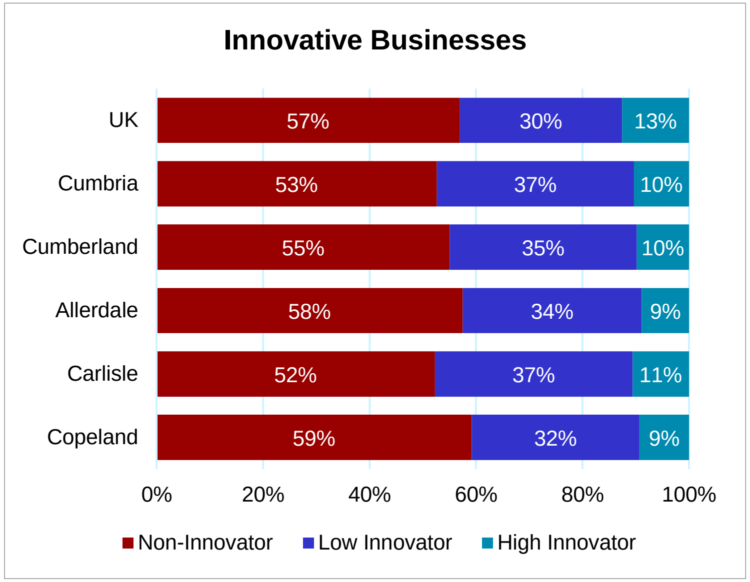
- Productivity in 2019 in all parts of Cumberland was significantly below the UK
  - 28% below in Copeland
  - 24% below in Allerdale
  - 14% below in Carlisle
- The gap has widened in Allerdale and Copeland since 2015 but has remained consistent in Carlisle.
- Overall sector mix is part of the reason for the productivity gap as is the shift from reprocessing to decommissioning at Sellafield.
- In some sectors there is both less economic activity relative to the national average and less productive activity.

NB: care should be taken interpreting productivity data for 2020 as this is particularly impacted by the pandemic, the job protection measures in place and the economic value of jobs most likely to have been inactive or to be working reduced hours.

3.10 Ideas & innovation

- Assets to build upon:
  - There is a reasonable level of business R&D (although it is likely to be concentrated in a few firms).
  - There is a world-class concentration of innovation assets related to the nuclear sector, particularly linked to decommissioning, safety and environmental clean-up.
  - The University of Manchester Dalton Cumbria facility is the largest single nuclear research institution in the UK.
  - There is a wide range of activity and some excellent assets linked to green energy, environmental sustainably and land management.

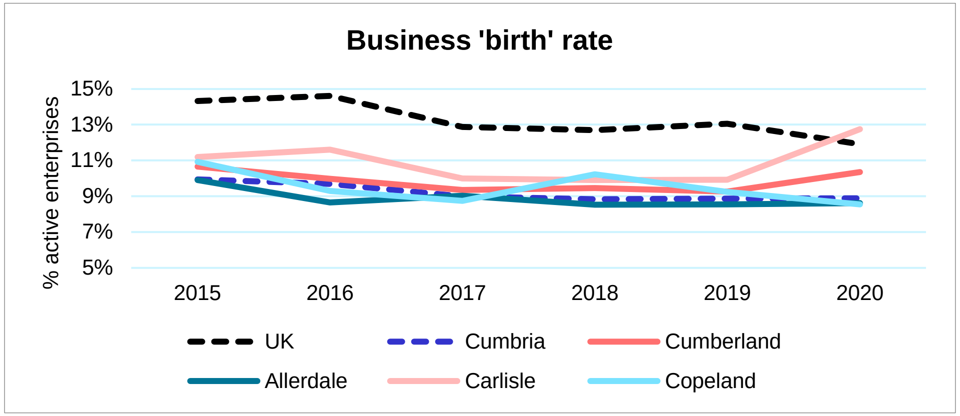
- Challenges to address:
  - There is relatively limited Higher Education based R&D, although the expansion of the University of Cumbria into new facilities provides a major opportunity to develop this further and Lancaster University works in partnership in the county.
  - On average it appears that many firms are less likely than average to be engaged in innovation activity and to engage with national R&D programmes and opportunities – although much innovation activity goes unrecorded by standard metrics.
  - Outside the nuclear sector there are many firms carrying out excellent innovation but overall there is a lack of a well-functioning innovation ecosystem.



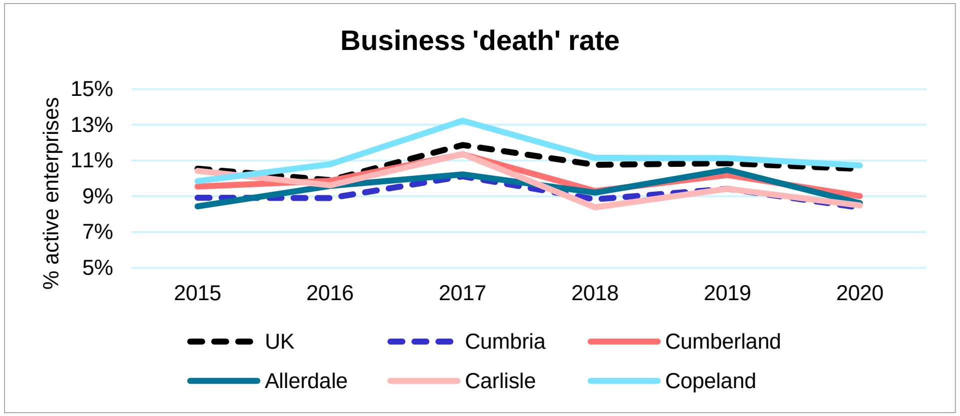
Source: The Data City

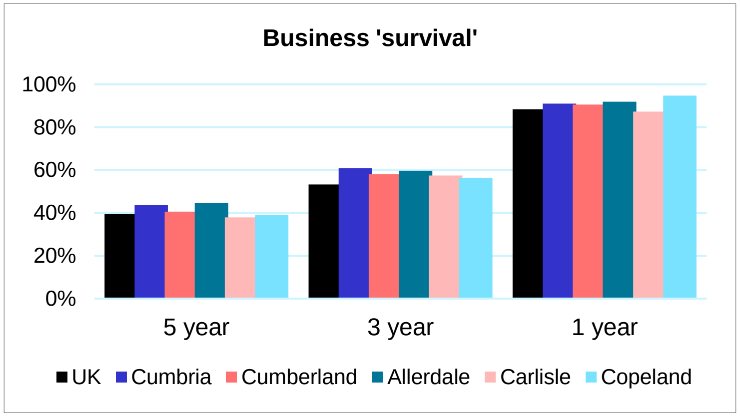
Analysis from The Data City suggests that around half of businesses whose registered office is in Cumberland are not innovation active which is similar to the UK average. However, more are considered to be low innovators than nationally 35% v 30%) and fewer to be high innovators (10% v 13%).

3.11 Business demography



- Business 'birth' and 'death' rates in Cumberland are both lower than the national average and have been so for each of the past 6 years.
- Carlisle has the highest 'birth' rate although this is influenced by the number of legal firms in the area who act as the registered office for small businesses.
- Copeland has the highest 'death' rate which is partly influenced by its relatively small stock of active enterprises (as is often seen in areas with a dominant employer such as Sellafield).
- Once established, businesses in Cumberland have slightly higher than average 'survival' rates.
- *NB: 2020 data should be treated with caution as HMRC activity was heavily impacted by the pandemic.*





Source: ONS Business Demography 2020

Business 'birth', 'death' and 'survival' are measured by registration/deregistration for VAT and/or PAYE. Rates are the proportion of active enterprises.

Cumbria County Council

Serving the people of Cumbria

4. People & skills

- Assets to build upon:
    - There is a strong and well-functioning vocational educational system, particularly through the Apprenticeship programme.
    - Good overall alignment of learning provision with the needs of the economy.
    - The workforce is well-endowed with technical and vocational qualifications.
    - Niche skills expertise in advanced manufacturing, nuclear and engineering.
    - University of Cumbria plans for a new Campus and broadening of HE offer.

- Challenges to address:
    - Declining workforce as the rate of in-migration of people of working age is not matching retirement rates and there is limited labour market slack.
    - Large replacement demand as the current workforce retires.
    - Particular labour supply gaps in hospitality, adult social care, health, logistics and manufacturing.
    - Increased disengagement from the labour market as a result of the pandemic.
    - Challenges matching the need for jobs with where extra labour supply exists, exacerbated by transport and housing affordability issues in parts of the area.
    - Broad future skills requirements are for a higher proportion of workers with high level skills and qualifications than currently exist in the labour force but there is a relatively low rate of high level skills in Cumberland and it is a small pool.
    - There are stubborn pockets of worklessness and lower skills in some areas.

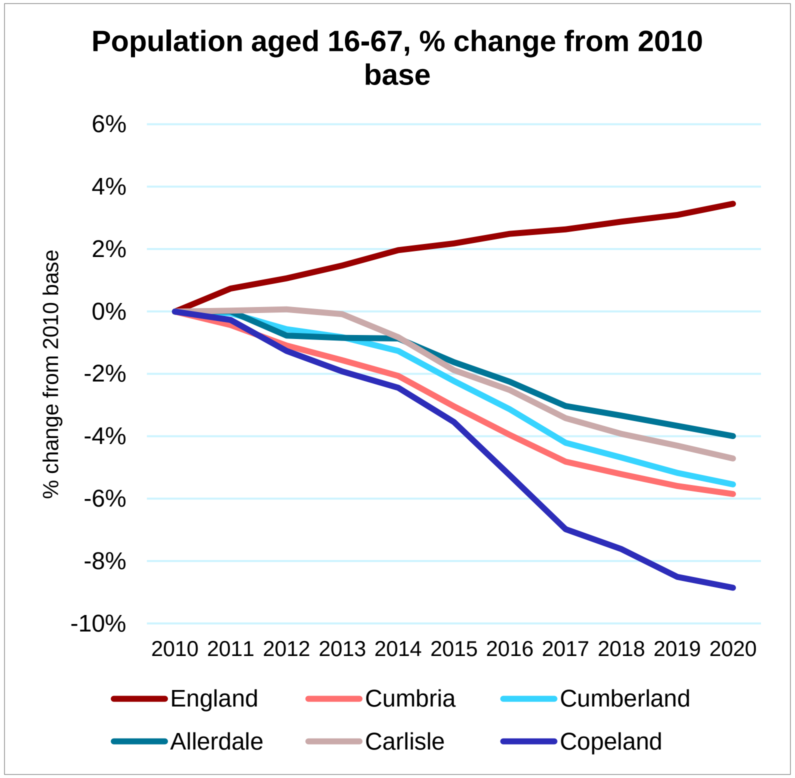
4.1 Demographics

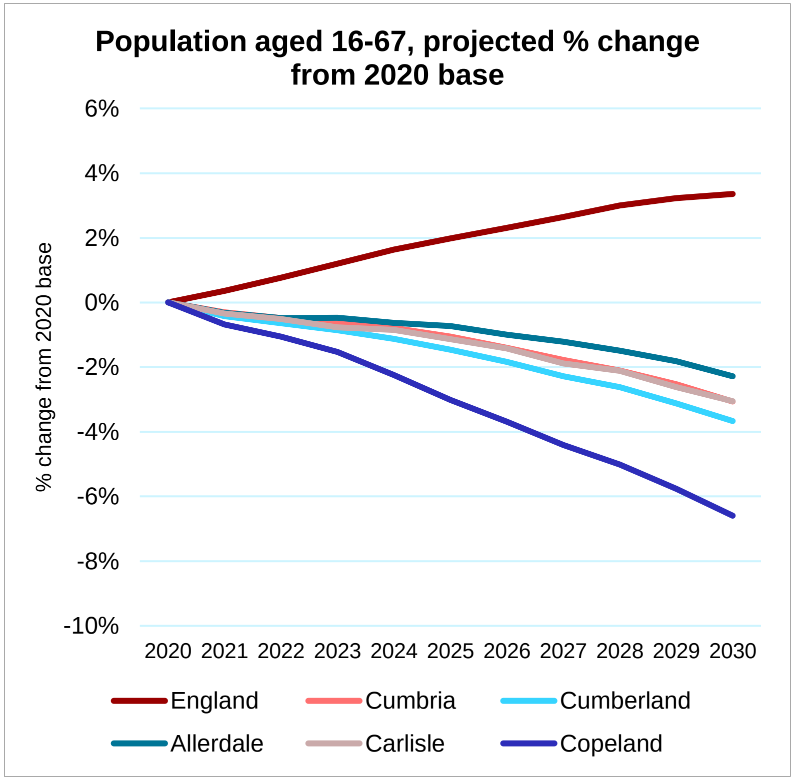
- Cumberland's population is 274,400 which is virtually unchanged from 10 years ago, in contrast to 7% growth nationally.
- Cumberland's population is projected to fall by -1% in the next decade in contrast to 4% growth nationally.

- The population aged 0-15 is projected to fall by 9% in the next decade which will reduce the future supply of replacement labour well beyond the following decade. In contrast, the population aged 67+ is projected to rise by 17%.

- The working age population (aged 16-67) was 174,000 in 2020 and has fallen by 10,200 (-6%) in past decade.
- This age group is projected to fall a further 6,400 in next decade (-4%) in contrast to national growth (+3%).
- This working age group has particularly declined in Copeland in the past decade (-9%), in contrast to Allerdale (-4%) and Carlisle (-5%) where the trend has been relatively similar, albeit still in stark contrast to the national growth trend.
- Working age population decline has accelerated in Copeland since 2015, particularly among those aged 16-44 where there has been negative net domestic migration (more moving out of the area than moving in). This may partly be linked to the change in focus of activity at Sellafield from reprocessing to decommissioning as it aligns to a reduction in economic activity in the sector.

4.2 Working age population





Source: ONS Mid-Year Estimates 2020 & Population Projections (2018 based)

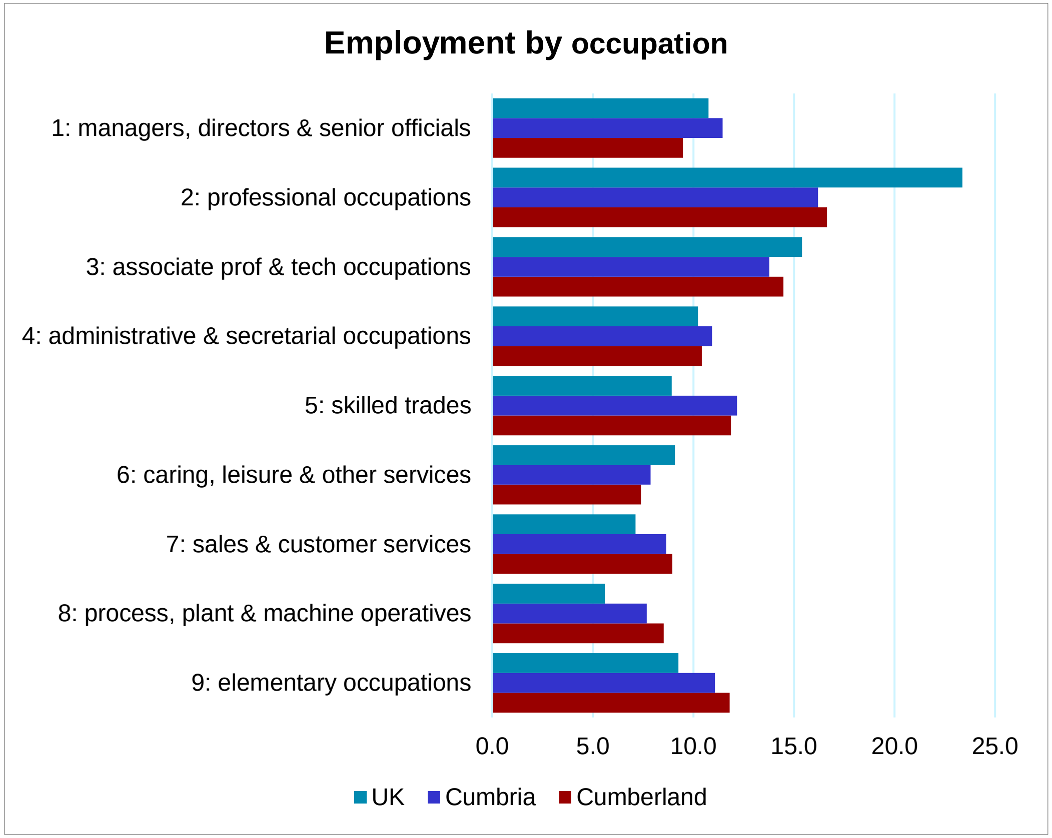
Cumbria County Council

Serving the people of Cumbria

4.3 Employment

- The proportion of working age people in employment in Cumberland was estimated to be 75% in 2021, down from 79% in 2019 (pre-pandemic) but still above the national average (UK 75% in 2021).
- The employment rate was estimated to be lower in Copeland (71%) than in Allerdale (74%) or Carlisle (79%).
- Nationally there is strong evidence that more people have disengaged from the labour market since the pandemic. The survey data for local areas is less accurate but suggests a similar trend in Cumberland with potentially 4,800 fewer economically active residents than before the pandemic. Some of this is due to natural population change but there is also evidence of residents withdrawing from the labour market.
- Cumberland's occupation structure shows a lower proportion of residents in high level occupations than nationally and more in skilled trades and in sales & customer service occupations.

4.4 Occupations



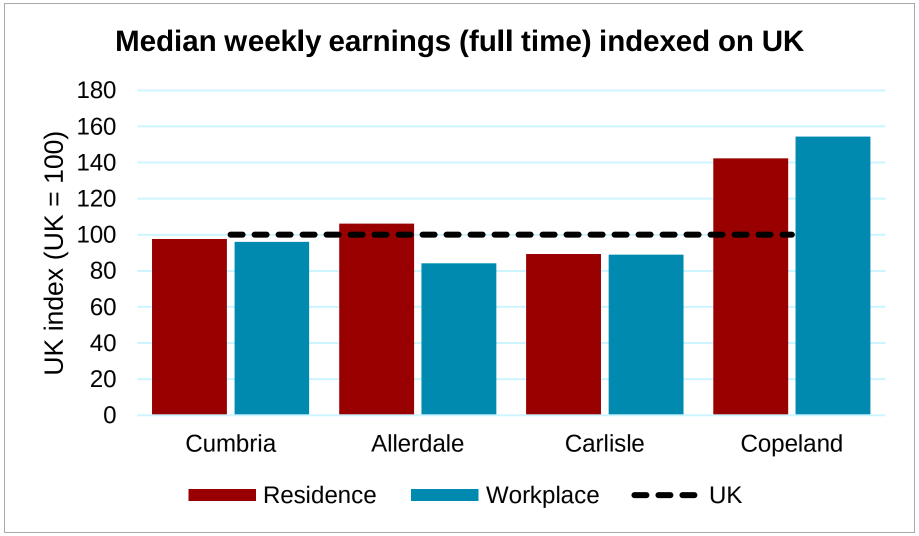
Source: ONS Annual Population Survey Dec 2021 (4 quarter average)

- Cumberland has proportionally fewer residents in high level occupations than the national average.
- In contrast, the area has more residents working in skilled trades, as process, plant & machine operatives and in sales & customer services.

Serving the people of Cumbria

4.5 Earnings

Median weekly earnings (full time)		
	Residence	Workplace
UK	£611	£611
Cumbria	£596	£586
Allerdale	£648	£514
Carlisle	£546	£544
Copeland	£869	£943



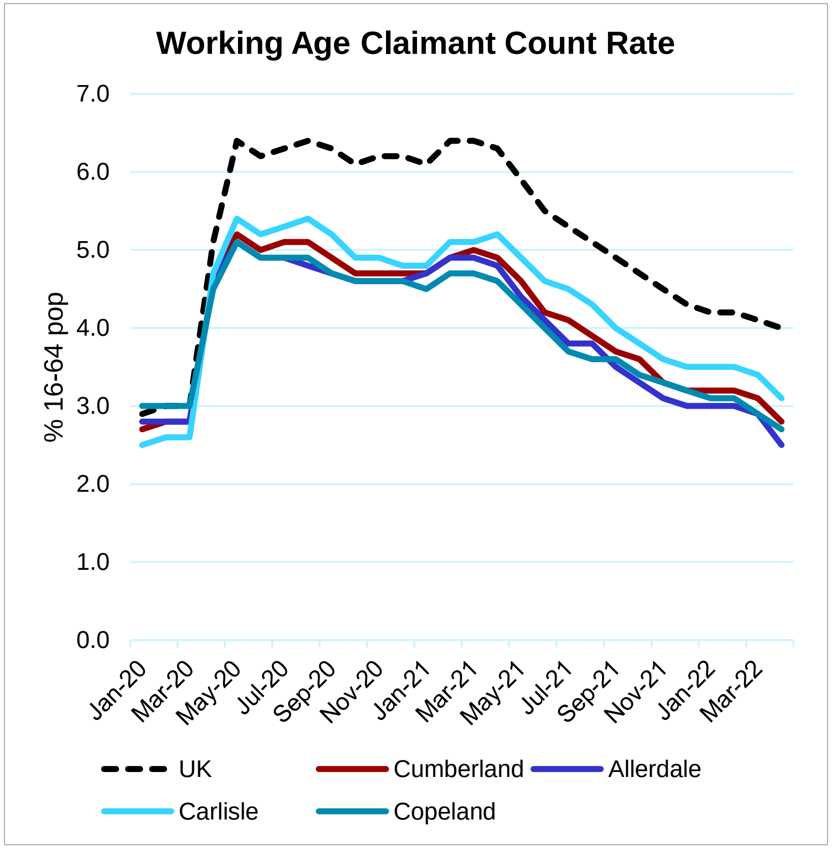
Source: ONS Annual Survey of Hours & Earnings 2021

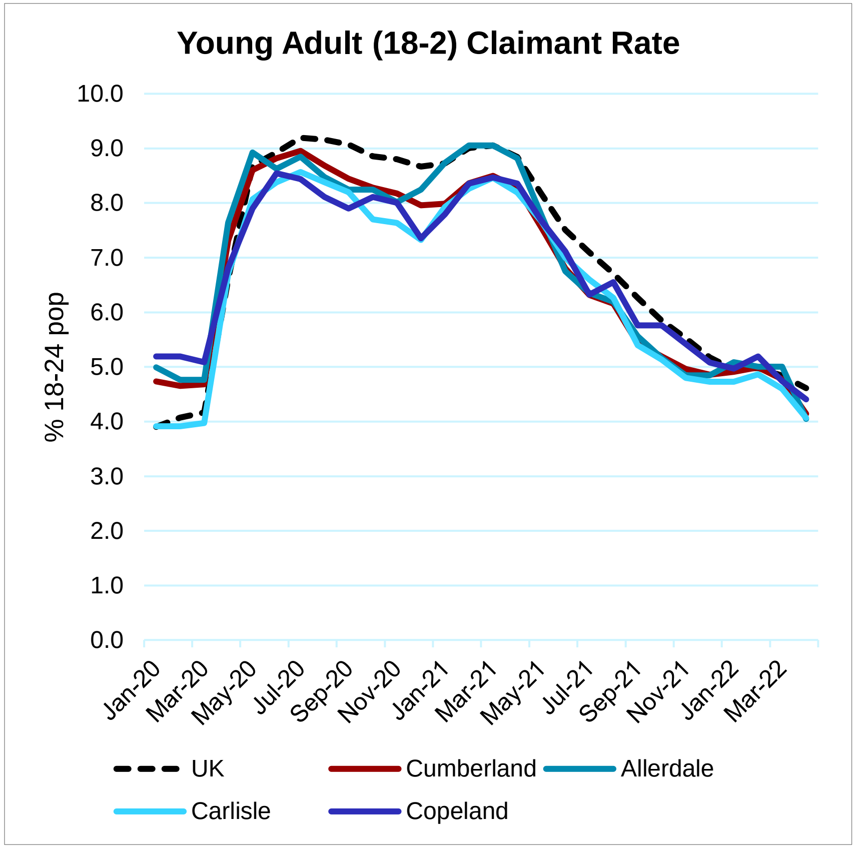
- Median full time earnings are significantly above the national average in Copeland both for residents in the area and at workplaces in the area as a result of the influence of the nuclear sector which skews the data somewhat.
- Earnings in Carlisle are broadly similar both for residents and workplaces but are only around 90% of the UK average.
- Allerdale in contrast has resident earnings slightly above the national average but workplace earnings well below average. This is a reflection of the nature of many of the jobs in the area and the attractiveness of it as a place to live which drives house prices in some areas up beyond a level which local jobs can support.

4.6 Unemployment

- In April 2022 there were 4,540 claimants actively seeking work giving a claimant rate of 2.8%. Carlisle had the highest rate (3.1%) with Allerdale (2.5%) and Copeland (2.7%) lower but all 3 areas were below the national average of 4%.
- Claimant counts and rates have fallen substantially and are now lower in Allerdale and Copeland than pre-pandemic (Jan 2019) but they remain higher in Carlisle.
- There were 755 young adults (aged 18-24) seeking work in April 2022 giving a claimant rate for this age group of 4.1% compared to the national rate of 4.6%. The rate was similar in all 3 areas.
- There were 197 young people aged 16-17 classed as Not in Employment Education or Training (NEET) in April 2022, a cohort rate of 3.6% compared to the national rate of 4.6%. It was highest in Carlisle (4.3%) and lower in Copeland (3.1%) and Allerdale (2.7%).

4.7 Claimant rate





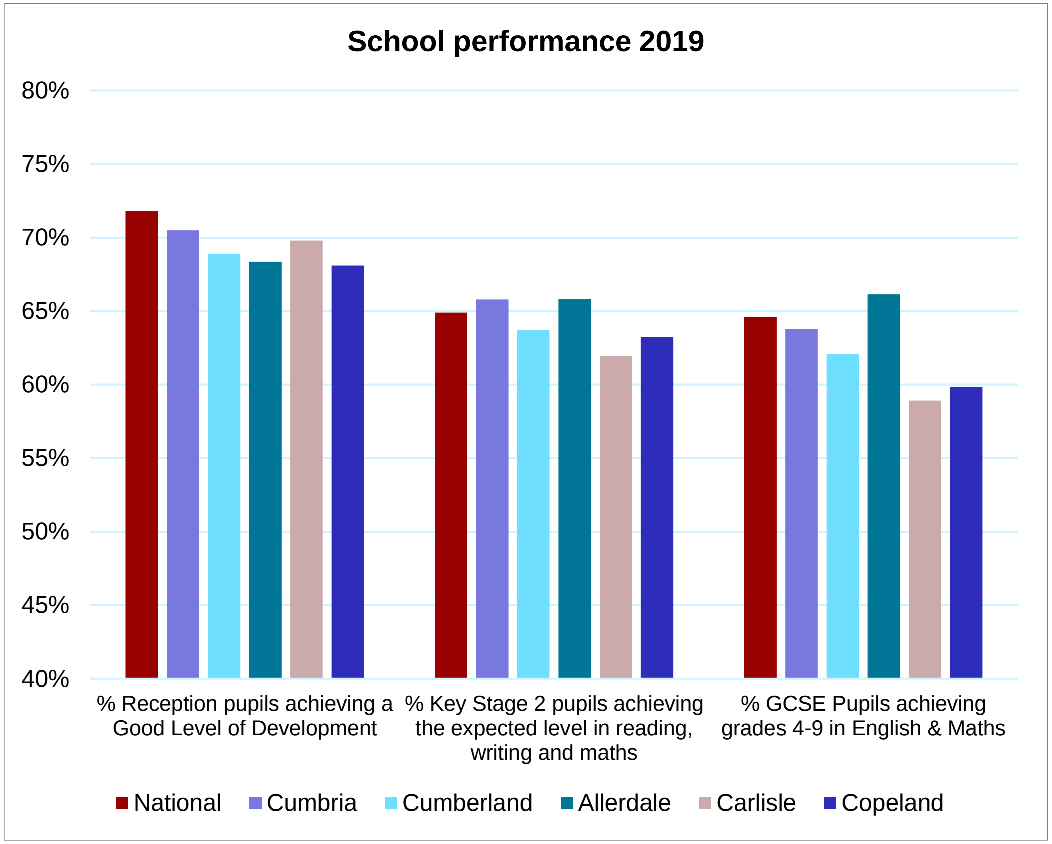
Source: ONS Labour Market in the Regions of the UK

4.8 School performance

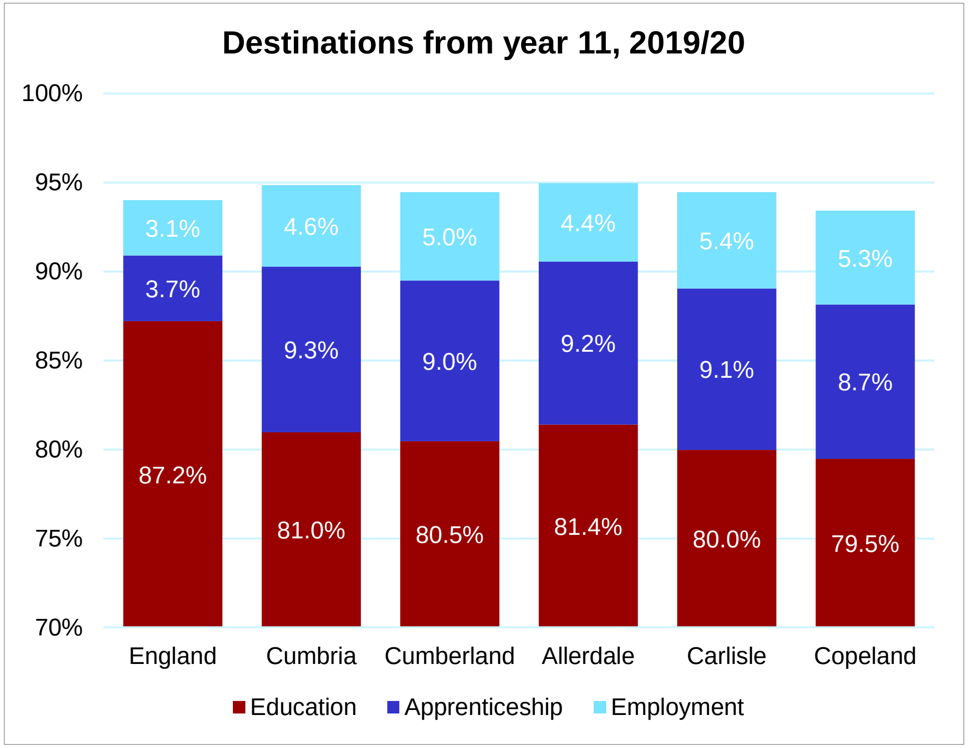
- School performance in Cumberland overall is below the national average at all stages.
- However, performance varies within the area:
  - in Carlisle reception performance is 2 percentage points below the national average but performance drops significantly at Key Stage 2 and by Key Stage 4 achievement is almost 6 percentage points below the England average.
  - In Allerdale the opposite is true - reception performance is 3 percentage points below the national average but Key Stage 2 and particularly Key Stage 4 performance are above the national average.
  - Copeland is below the national average at all 3 stages with the biggest gap at Key Stage 4 where it is 5 percentage points below England.

NB: 2019 figures are used as measurement was paused during the pandemic.

Source: Department for Education 2019



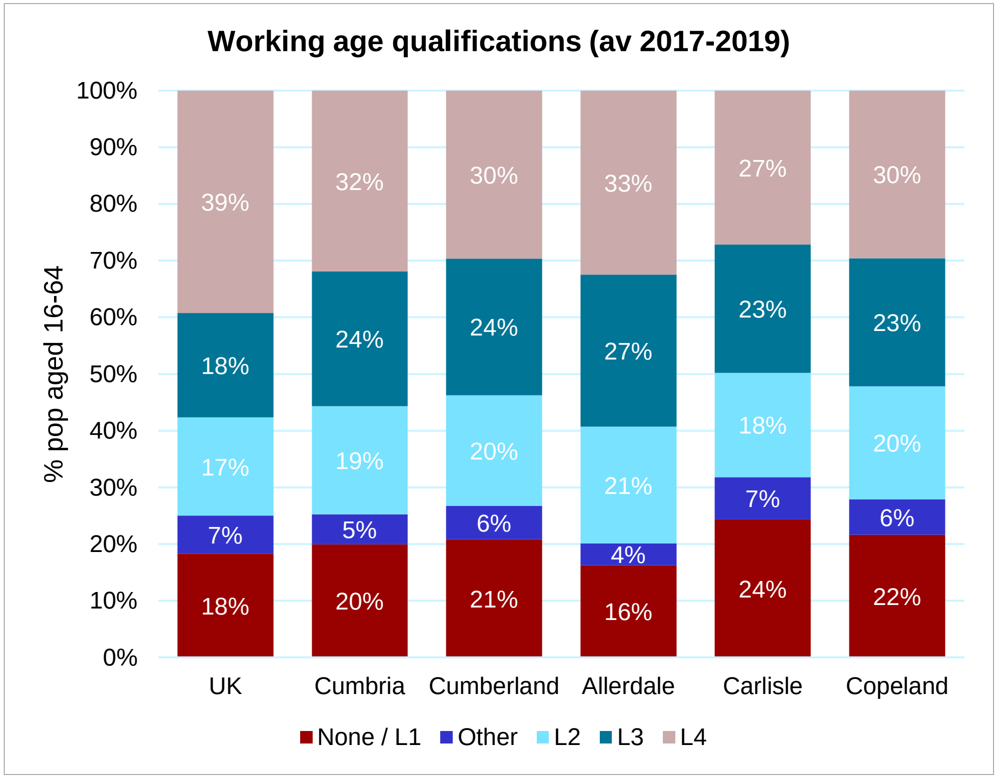
4.9 Destinations from year 11



Source: Department for Education 2019

- Young people are slightly more likely than the national average to go into a sustained destination after Year 11 (ie sustained for more than 6 months).
- They are more than twice as likely to go into an Apprenticeship than nationally (9.0% v 3.7%) and are also more likely to go into employment (5.0% v 3.1%).
- As a result of this, young people are less likely to remain in education after Year 11 than nationally.
- There is some variation within the area but all 3 districts have higher than average Apprenticeship and employment rates and lower than average sustained education rates.
- This is reflective of the employment structure in the area and the strong provision of quality work-based learning.

4.10 Working age qualifications



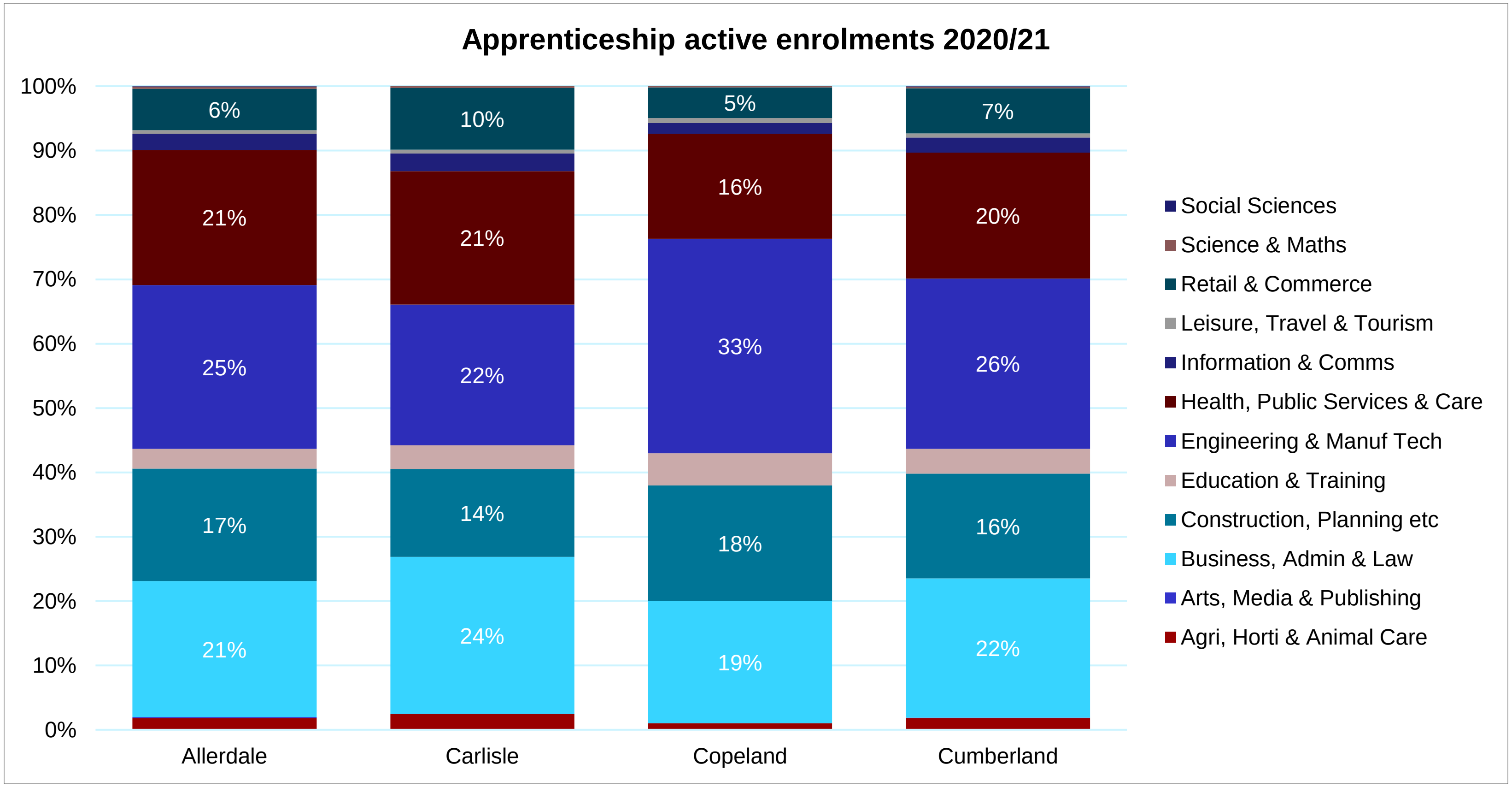
- Data on qualifications can be unreliable for local areas as the sample sizes for the survey used to collate it are small. In particular the survey was impacted by the pandemic when face-to-face surveys weren't possible.
- Despite the reliability issues, it is clear that Cumberland has a lower proportion of residents with high level (4+) qualifications than nationally but a corresponding higher proportion with level 2 and 3 qualifications.
- There is a slightly higher proportion with no or only level 1 qualifications but this is not significant given margins of survey error.
- At district level, data reliability is even more of an issue but suggests that Allerdale has the highest proportion of residents with high level qualifications.

Source: ONS Annual Population Survey (average 2017-2019)

4.11 Apprenticeships

- Apprenticeship starts (all ages) have been falling year on year – down from 2,496 in 2018/19 to 2,005 in 2020/21 (when they were hit by the pandemic). In the first two quarters of 2021/22 the number of starts has recovered somewhat and if previous patterns of starts are repeated, the overall level for the year is projected to be similar to the volume in 2019/20.
- Four subject areas accounted for 84% of active enrolments in 2020/21 – engineering & manufacturing technologies; business, administration & law; health, public services and care; construction, planning & the built environment.
- In Allerdale, engineering & manufacturing technologies was the biggest subject area , accounting for 25% of apprentices resident in the area, followed by health, public services & care and business, administration & law (both with 21%) and construction, planning & the built environment (17%).
- In Carlisle, business, administration & law was the biggest subject area, accounting for 24% of apprentices resident in the area, followed by engineering & manufacturing technologies (22%), health, public services & care (21%) and construction & the built environment (14%).
- In Copeland, engineering & manufacturing technologies was the biggest subject area (33%), followed by business, administration & law (19%), construction & the built environment (18%) and health, public services & care (16%).
- Apprenticeships are a particularly important route for young people in Cumbria with on average 10% of 16/17 year olds engaged with an Apprenticeship, more than double the national average.

4.12 Apprenticeships by sector

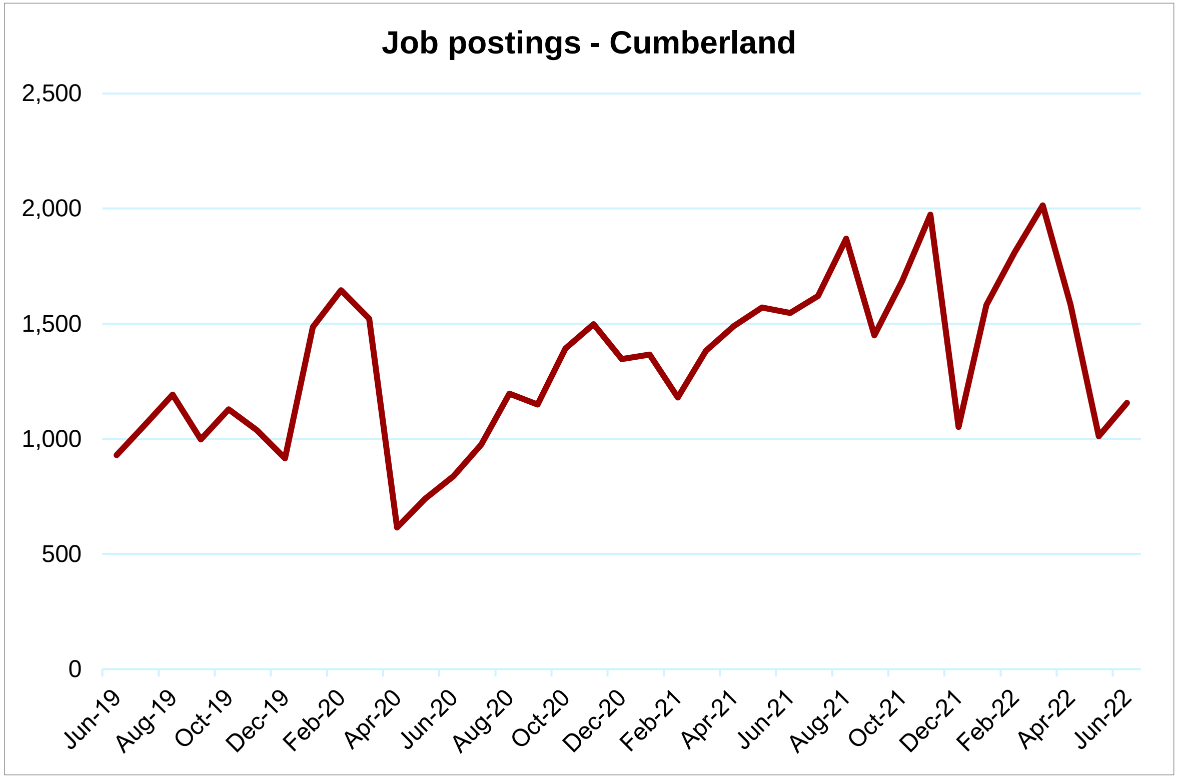


Source: Department for Education Localities Datacube

4.13 Skills demand

- In the 2020 Cumbria Business Survey, conducted in Q4 2020, 44% of business said that the availability of people able to do the job was a significant barrier to business performance. The proportion was broadly similar across Cumberland – Allerdale (47%), Carlisle (44%), Copeland (42%) – and amounts to an estimated 3,250 registered businesses identifying a concern at that stage.
- In the same survey, 22% of businesses in Cumbria said they already had skills gaps among their current workforce. This was broadly similar across areas within Cumberland.
- Since the survey and the lifting of pandemic restrictions, businesses across the area have reported labour shortages, particularly those in public facing sectors such as the visitor economy, social care etc, although challenges are being experienced across all sectors and in all locations.
- Job postings continue to run at levels well above those seen pre-pandemic – the volume of postings in Cumberland in April 2022 was 105% higher than in April 2019.

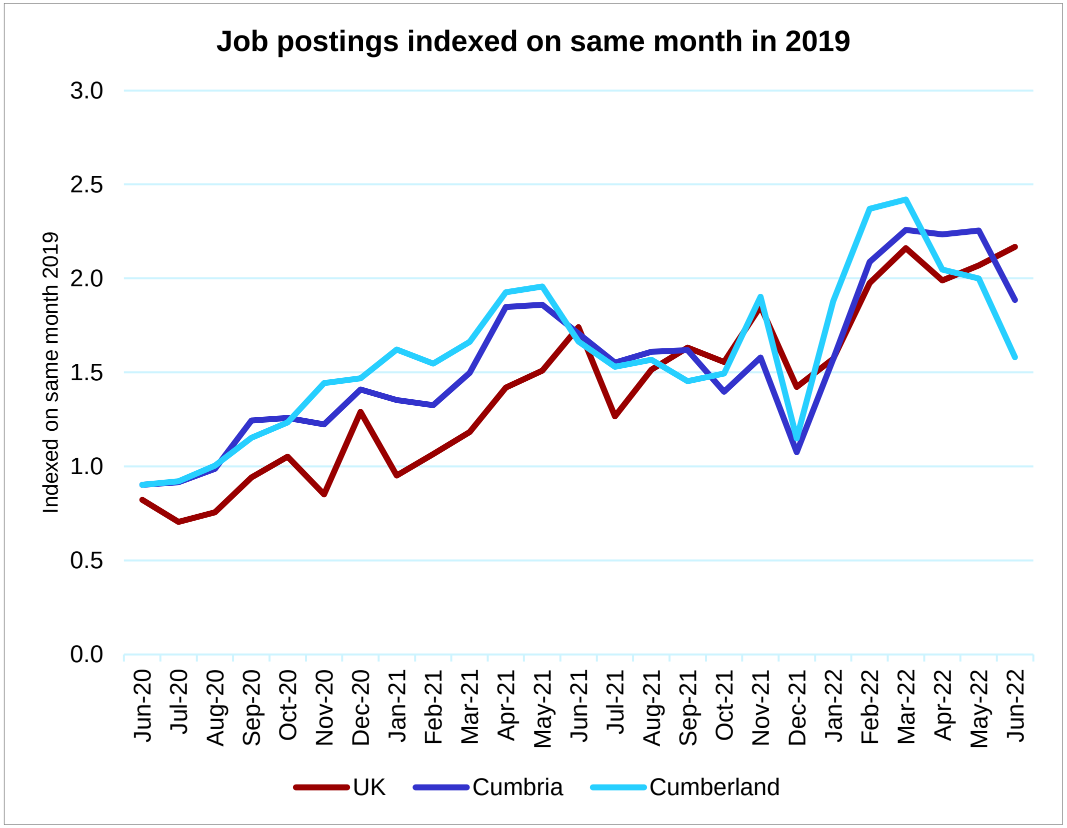
4.14 Job Postings



Source: Lightcast™ Labour Insight

- Online job postings are one way of monitoring recruitment activity by local businesses although this does capture the entire extent of recruitment, some of which takes place by other means.
- The sharp fall in recruitment activity at the start of the pandemic is clearly seen from February 2020 followed by a number of peaks and troughs as restrictions were lifted and then reimposed.
- The peaks for recruitment in Cumberland came just before Christmas in 2021 and Easter in 2022.
- Levels have eased as 2022 has progressed but are still above those seen before the pandemic.

4.15 Job postings index



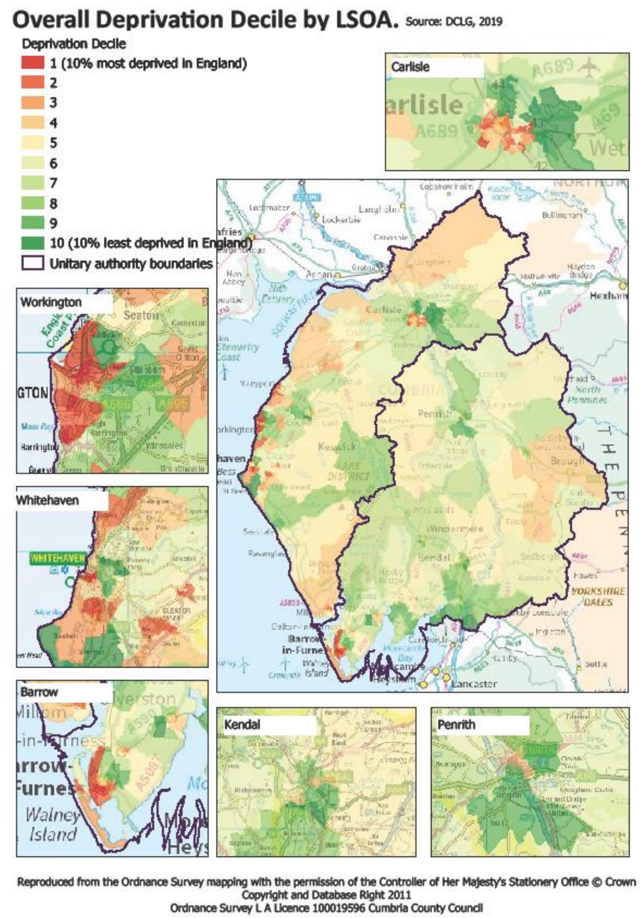
Source: Lightcast™ Labour Insight

- This chart shows job postings indexed on the same month prior to the pandemic.
- It shows that with without exception the level of monthly job postings has exceeded the same pre-pandemic month since August 2020.
- This was particularly the case in the first half of 2021 and the early part of 2022.
- Whilst there are signs that recruitment activity may be stabilising, job posting levels are still over one and a half times higher than pre-pandemic reflecting the ongoing recruitment challenges faced by businesses.

5. Deprivation

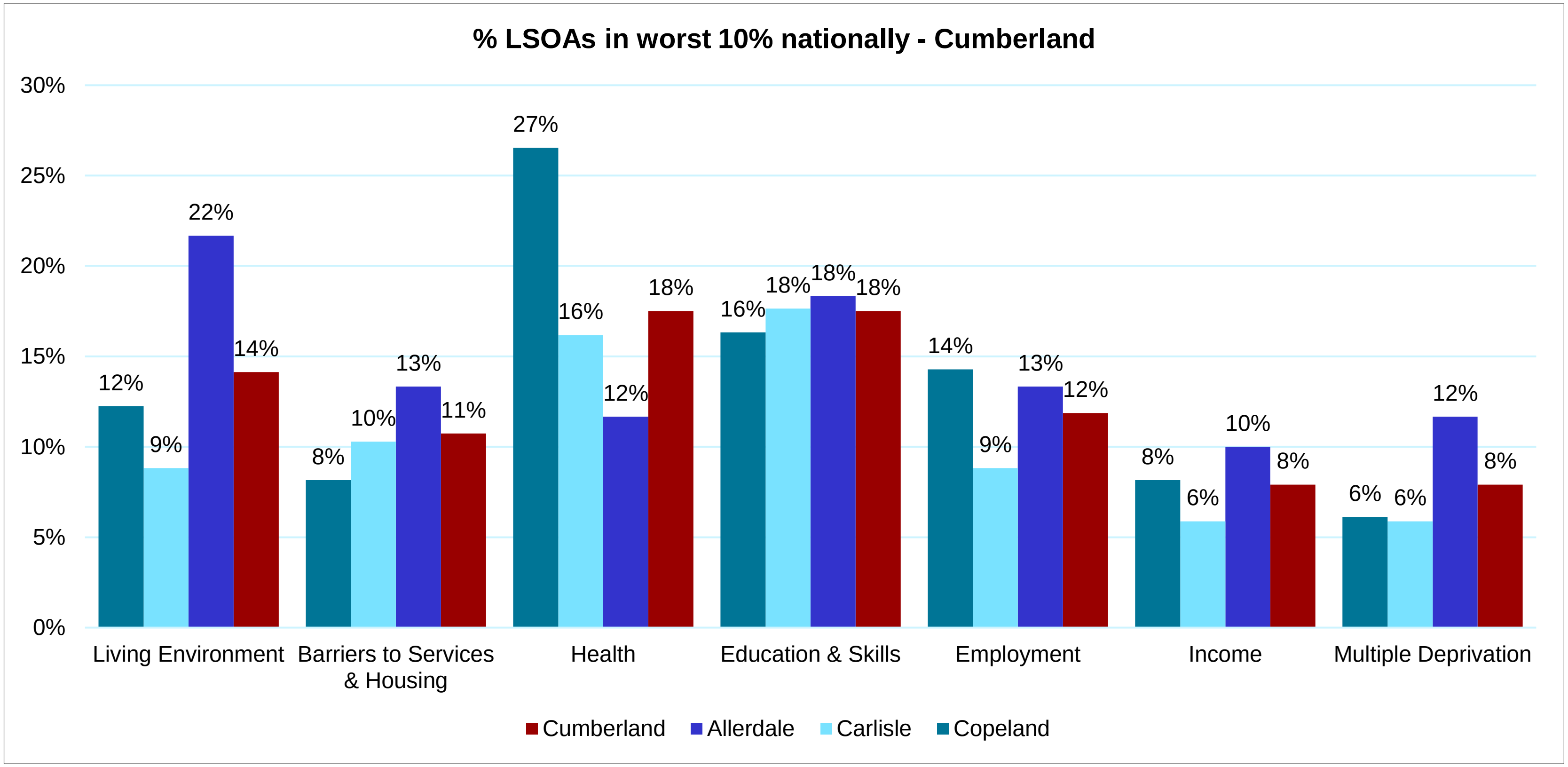
- 8% of Cumberland’s communities (LSOAs) are in the 10% most deprived areas in England. Allerdale has the highest proportion (12%) followed by Copeland and Carlisle both with 6%.
- Conversely, 6% of LSOAs are in the least deprived nationally (7% of areas in Carlisle, 5% of those in Allerdale and 4% of those in Copeland).
- 8% of LSOAs are in the worst 10% for income deprivation overall, 7% for income deprivation affecting children, 12% for employment deprivation and 18% for education & skills deprivation. These areas are mostly concentrated in Maryport and Workington in Allerdale, urban parts of Carlisle (plus Longtown for education & skills), Cleator Moor and Whitehaven in Copeland.
- Median gross household income (from all sources) in Cumberland is £28,794 which is 78% of the GB average and it is similar in all 3 districts within Cumberland.
- 11% of households have gross household income below £10,000 (similar in all 3 current district areas).
- 16% of children are estimated to live in low income families (7,506 children) compared to 19% nationally. Carlisle has a higher rate (19%) than Allerdale (17%) and Copeland (16%).
- 23% of adults aged 18-64 are in receipt of some form of DWP benefit (35,700 residents) with similar rates in all 3 districts.

5.1 Deprivation map



- Overall, Cumberland has 8% of Lower Super Output Areas (neighbourhoods) in the worst 10% nationally for overall deprivation.
- Allerdale ranks as the 104th most deprived out of 317 lower tier authorities, Carlisle ranks 117th and Copeland ranks 85th (where 1 is most deprived).
- This is driven by concentrations of overall deprivation n parts of Workington and Maryport.
- In contrast, although both Carlisle and Copeland also have deprived neighbourhoods they have fewer that are in the 10% worst nationally.
- Education & Skills and Health are the domains in which the highest proportion of neighbourhoods in Cumberland experience deprivation (in both cases 18% are in the worst 10% nationally), followed by employment.
- Copeland has particular deprivation in the health domain (27% of neighbourhoods in the worst 10% nationally) whilst Allerdale has for living environment (22%) which is heavily influenced by the number of properties without central heating.

5.2 Indices of deprivation

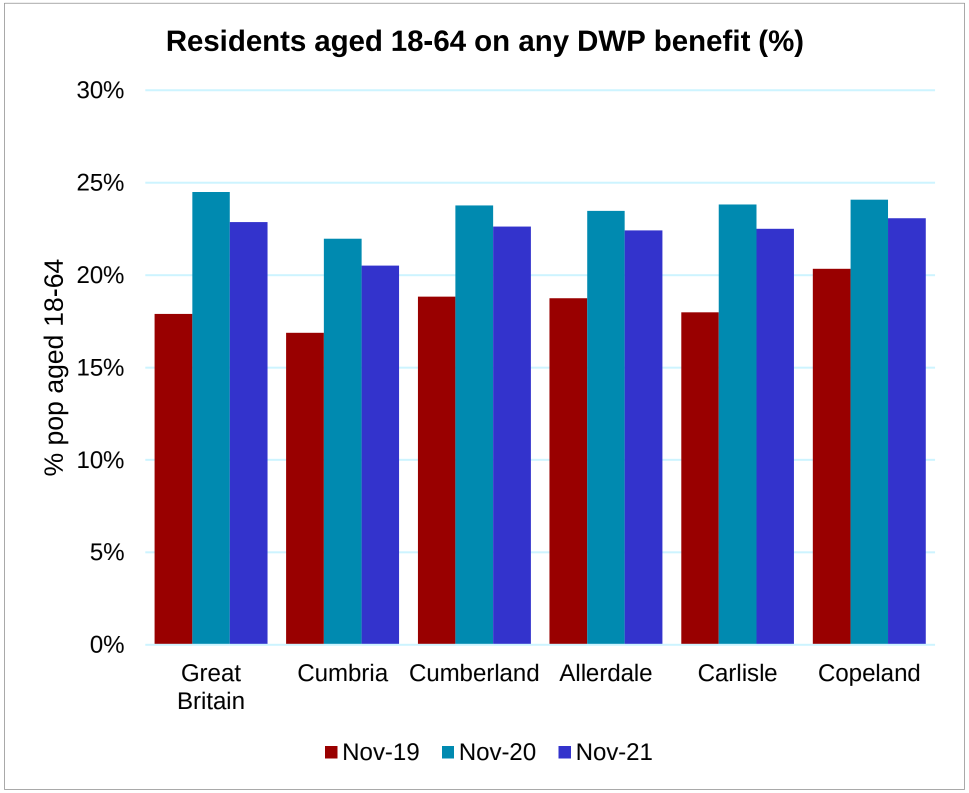


Source: MHCLG Indices of Deprivation 2019

Cumbria County Council

Serving the people of Cumbria

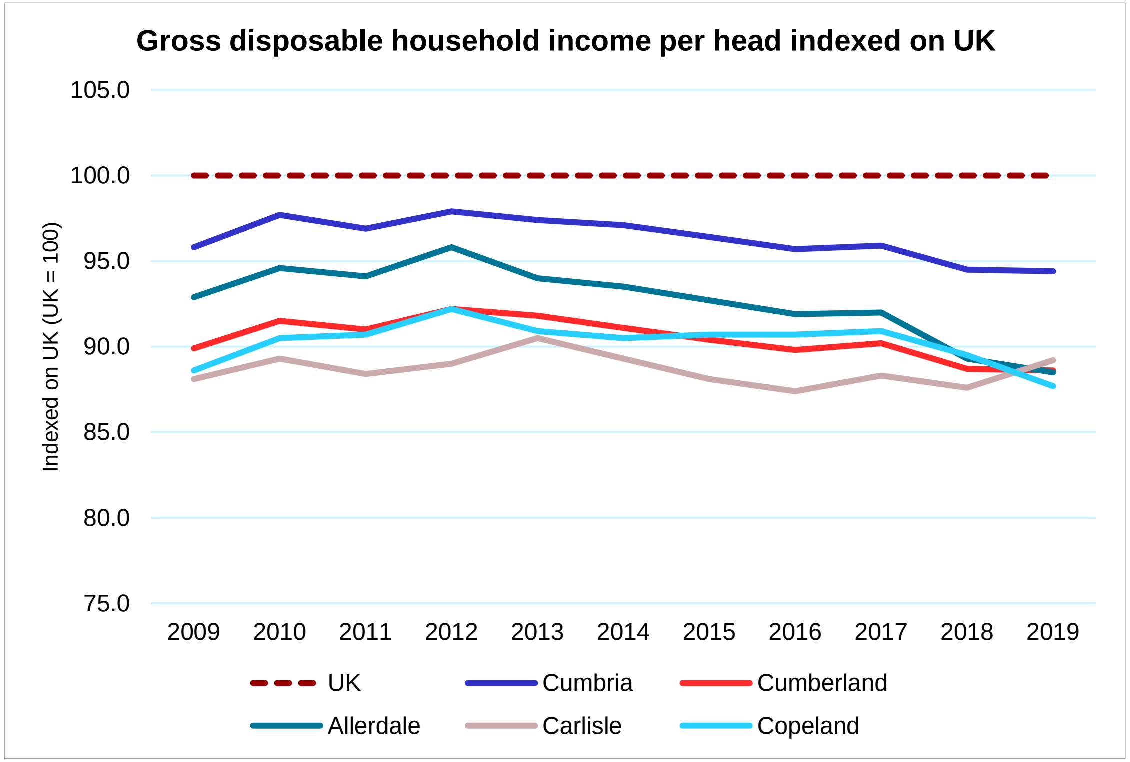
5.3 DWP benefits



- In November 2021 almost a quarter of working age residents in Cumberland (aged 18-64) were in receipt of one or more DWP benefit.
- This is the same as the national average but has increased from one in 5 three years ago.
- The proportion of working age residents in receipt of DWP benefits is similar across all areas within Cumberland .

Source: Department for Work & Pensions

5.4 Disposable household income



Source: ONS Regional Gross Disposable Household Income 2019

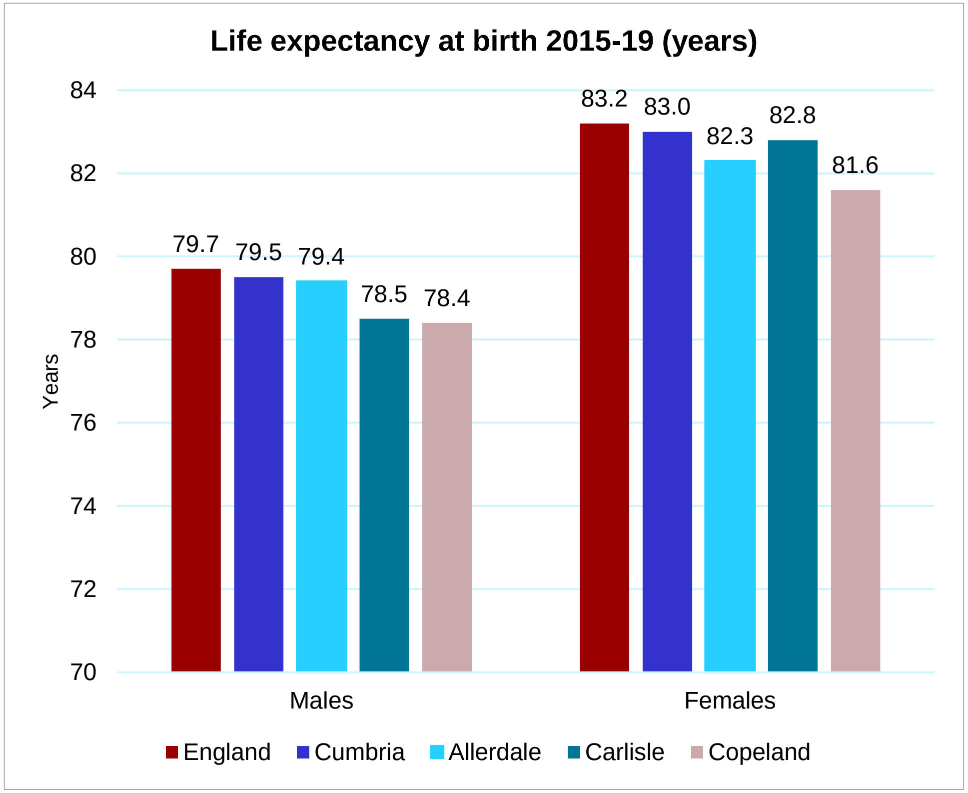
- Gross Disposable Household Income (GDHI) has been below the national average for the past decade and the gap has been widening since 2012, particularly since 2017.
- Levels are now similar in all areas of Cumberland as a result of a significant relative decline in Allerdale since 2012.

Gross disposable household income (GDHI) is the amount of money that individuals in the household sector have available for spending or saving after income distribution measures have taken effect.

Cumbria County Council

Serving the people of Cumbria

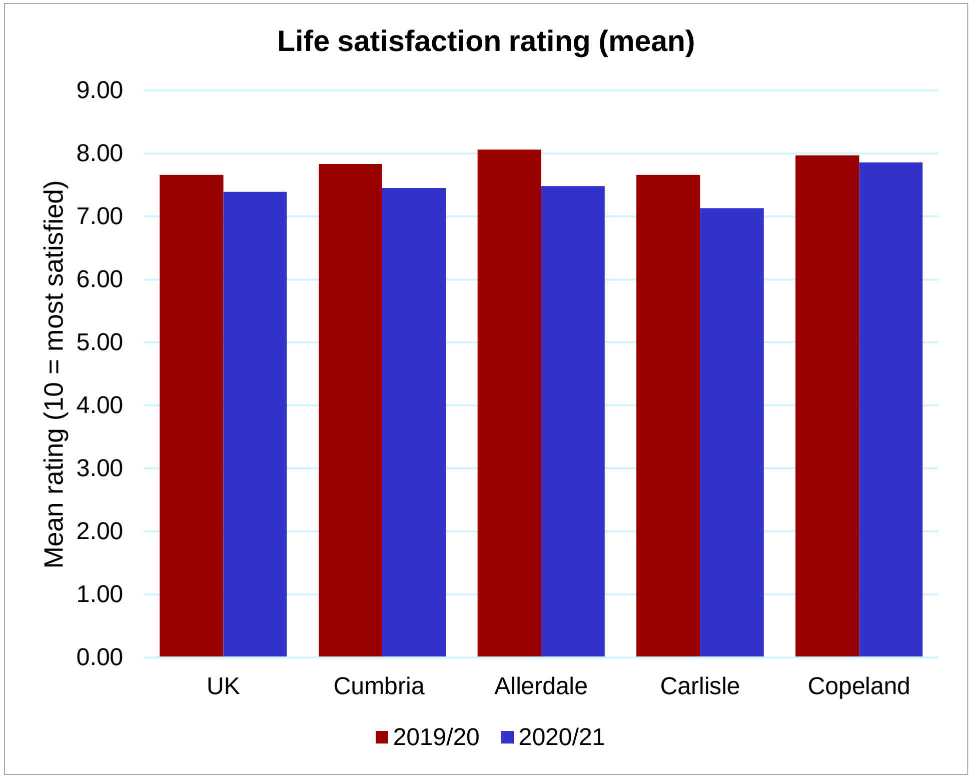
5.5 Health



Source: Local Health Office for Health Improvement & Disparities

- Life expectancy at birth is lower than the national average in all parts of Cumberland for males, more so in Carlisle and Copeland than in Allerdale.
- Life expectancy at birth for females is higher than for males in all areas but is lower than the national average. Female life expectancy is lowest in Copeland and highest in Carlisle.

5.6 Wellbeing



- Overall life satisfaction has consistently been very similar to the UK average since the survey data became available in 2011.
- In 2020/21, general life satisfaction fell in Allerdale and Carlisle, as well as nationally but held up well in Copeland despite the pandemic.

Source: ONS Personal Wellbeing in the UK (question was "overall how satisfied are you with your life nowadays?"

6. Housing, transport & infrastructure

- Assets to build upon:
  - Excellent strategic transport connectivity from the north of the area down the M6 spine and across the A69 to the east of Britain.
  - Good train service from the north of the area to south and north down West Coast Mainline, potentially enhanced by HS2.
  - Majority of area covered by superfast broadband.
  - Major energy opportunities (tidal, further wind, nuclear).
  - Excellent natural assets (air quality, water, natural beauty).
  - Capacity in some key employment locations (eg Enterprise Zone in Carlisle).

- Challenges to address:
  - Poor connectivity across to the west and south of the area by rail and also within the area.
  - Pinch points and lack of resilience in road network outside M6 corridor.
  - Lack of 4G and mobile coverage to premises and across the land area.
  - Availability and affordability of housing in some areas

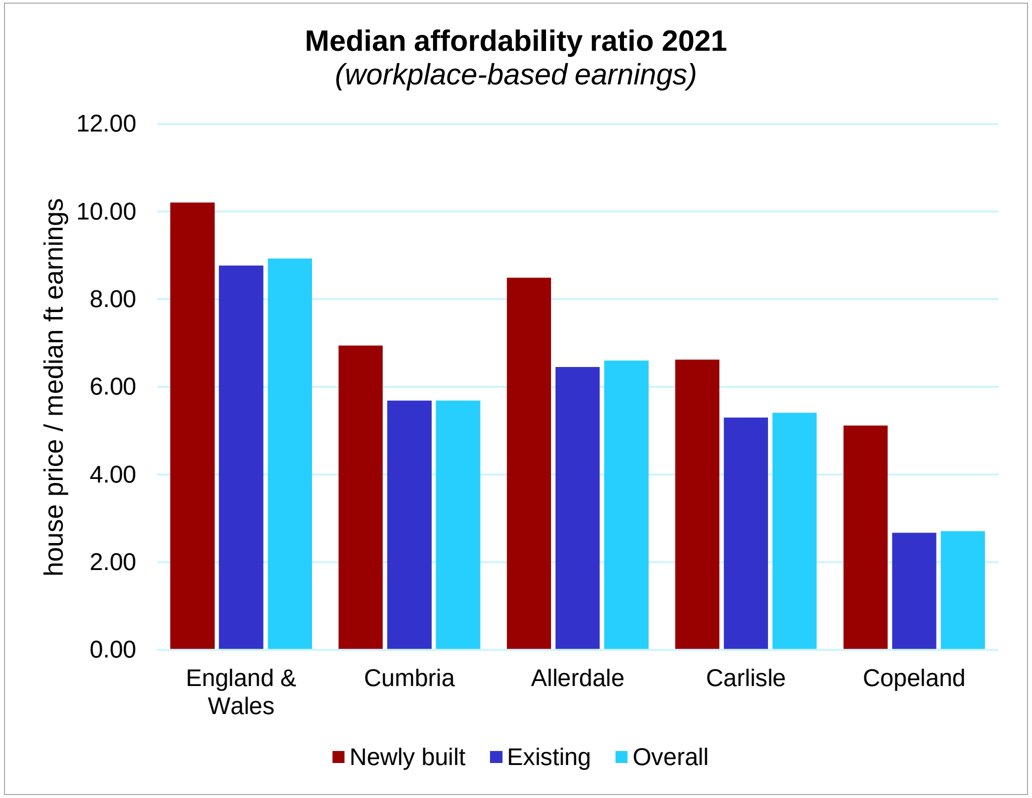
6.1 Housing stock & building

5-year average (2017-2021)				
	Housing stock		Affordable housing	
	Total stock	Net additional	Completed	Started
England	24,413,302	228,139	51,586	58,098
Cumbria	250,921	1,665	320	295
Cumberland	134,782	1,014	205	176
Allerdale	47,690	325	68	60
Carlisle	53,646	554	131	107
Copeland	33,447	135	6	9

Source: HLUHC Live Tables on Dwelling Stock

- Over the past 5 years, Cumberland has on average added 1,014 dwellings per year to its overall housing stock, Carlisle having the highest number and Copeland the lowest.
- On average over the past 5 years, Cumberland has completed 205 affordable dwellings per year and started 295 per year.

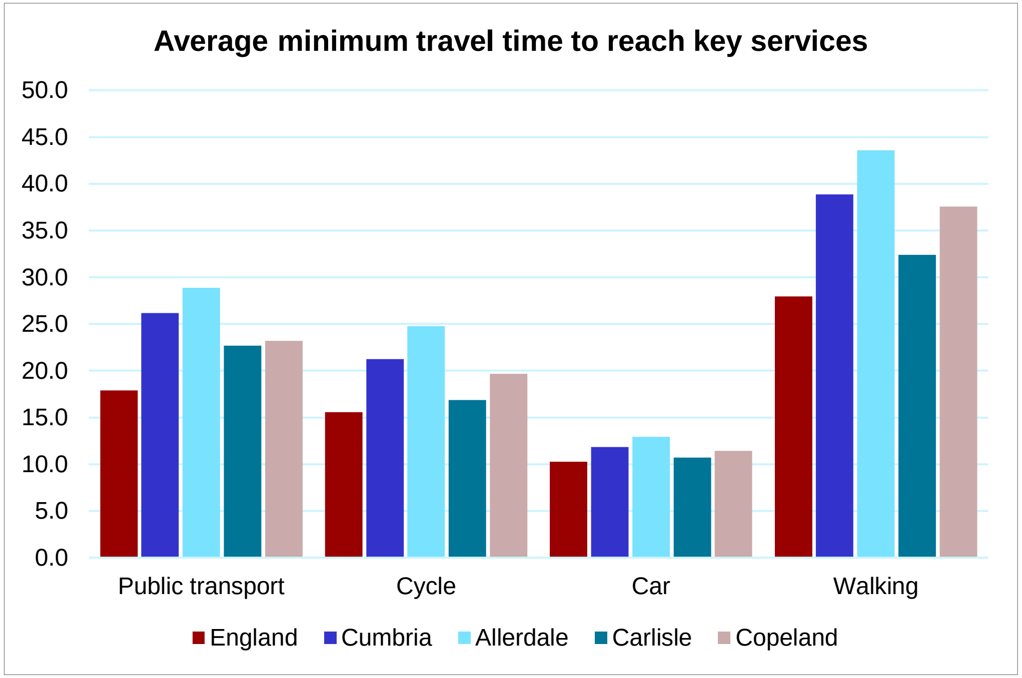
6.2 Housing affordability



Source: ONS Housing Affordability in England & Wales

- Housing affordability is better than the national average in all parts of Cumberland and particularly so in Copeland which has some of the best housing affordability in the country (although this is linked to high earnings in the nuclear sector and affordability will be more challenging for those who work in other sectors).
- Newly built dwellings are less affordable than existing dwelling in all parts of Cumberland and particularly so in Allerdale.

6.3 Access to services



The average of minimum journey times to medium sized centres of employment (500-4999 jobs), primary schools, secondary schools, further education, GPs, hospitals, food stores and town centres.

Source: DfT Journey Time Statistics 2019

- Average minimum travel time to reach 8 key services is longer by all forms of transport in all three areas within Copeland than nationally.
- Allerdale has the longest average minimum travel time for all forms of transport followed by Copeland and then Carlisle.

6.4 Transport Project Pipeline

A number of transport and infrastructure related projects are underway or in development which will help address some of the physical barriers impacting the labour market, including:

- **Funding secured and projects in delivery**
  - Carlisle Southern Link Road
  - Carlisle Station
  - Port of Workington
  - Rural Mobility Pilot (Wigton / Egremont)
  - Carlisle Southern Gateway (Town Deal)
  - Workington Townscape and Connectivity (Town Deal)
- **Infrastructure Planning on Major Projects**
  - Sellafield
  - St Cuthbert's Garden Village
  - HS2
- **Business cases submitted and pending approval**
  - A595 Bothel
  - Cumbrian Coast Line
  - Workington Gateway (Levelling Up Fund)
  - Connecting Millom and Haverigg (Town Deal)
  - Cleator Moor Connected Town (Town Deal)
- **Business cases in development**
  - Hadrian's Wall Walking and Cycling corridor
  - Levelling Up Fund proposal – Energy Coast Resilient Routes
  - Access for All (Millom / Workington)

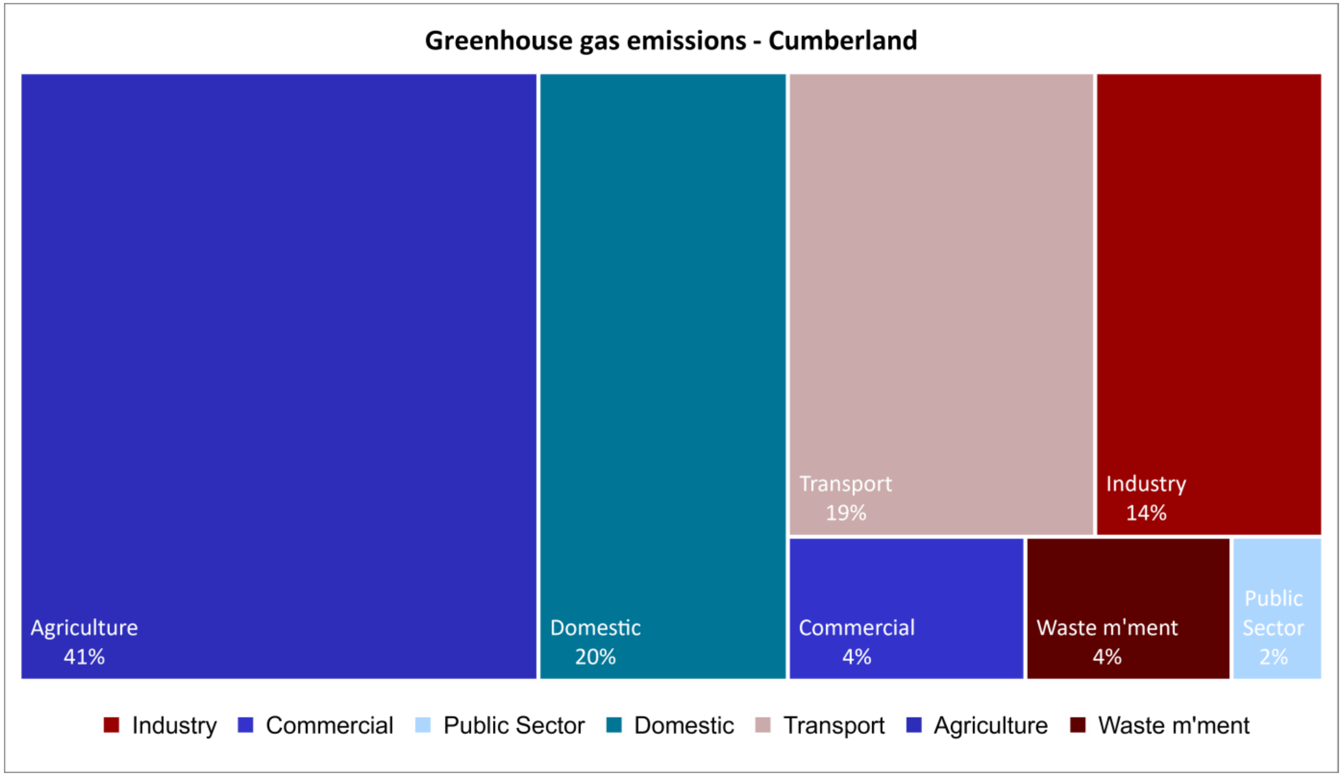
6.5 Broadband & 4G coverage

Broadband Coverage January 2022						
	England	Cumbria	Cumberland	Allerdale	Carlisle	Copeland
Superfast Broadband (30Mbit/s+)	96.8	94.0	94.7	93.7	95.1	95.4
Ultrafast Broadband (100Mbit/s+)	70.3	20.6	25.0	3.9	58.1	2.0
Ultrafast Broadband (300Mbit/s+)	68.4	18.9	22.4	3.9	51.5	2.0
Full Fibre	31.3	9.2	4.9	3.9	7.6	2.0
Gigabit	66.8	17.8	20.7	3.9	47.3	2.0
No access to download at/above 10Mbit/s and upload at/above 1Mbit/s	0.2	0.7	0.7	0.5	0.8	0.9

Mobile Phone Coverage by 1 or more operator				
Service type		Allerdale	Carlisle	Copeland
% premises indoors	3G	99.2	99.3	98.3
	4G	98.5	98.5	97.2
% premises outdoors	3G	99.8	99.8	99.5
	4G	99.4	99.6	99.3
% geographic area	3G	93.1	95.7	87.5
	4G	88.5	88.5	79.2

Source: Ofcom Connected Nations Jan 2022

6.6 Greenhouse gas emissions



- In 2020, total greenhouse gas emissions in Cumberland were 2,358.5 $ktCO_2e$.
- Almost half occurred in Allerdale (46%) followed by Carlisle (38%) and Copeland (16%).
- Emissions per capita in 2020 were 8.6 tCO_2e, one and a half times the national average and were 0.7 $ktCO_2e$ per km^2, half the national average.
- The biggest contributor to emissions was agriculture which generated 41% of emissions.
- Emissions have fallen by 9% since 2018 in comparison to a fall of 12% for the UK.

Source: BEIS UK Local Authority GHG Emissions 2020. Gasses covered are carbon dioxide, methane and nitrous oxide

Note: Emissions related to energy supply are based on the point of consumption, emissions not energy related are based on the point of emission other than waste management emissions which are based on where the waste was produced.

Further information

For more information please contact:

Ginny Murphy

Cumbria Intelligence Observatory

Email: ginny.murphy@cumbria.gov.uk

Tel: 07826 859026

Serving the people of Cumbria