Overview on Norfolk’s Workforce, Businesses and Economy

Methodology and Caveats

- This report is based on both publicly available as well as internal data and information.
- Published data, such as from ONS, are not always timely or available at lower geographical levels.
- Some of the data in this deck predates the outbreak of COVID in the UK and / or the start of the lockdown. Therefore these are treated as setting the baseline and will be updated as soon as new, relevant data is available.
- Where data is only available at national or regional level, we have tried to apply the numbers to similar data available at county or LA level. These numbers are therefore internal calculations and not official statistics. In some cases analysis at local level was not possible.
- In the main we have used the ONS's Business Register and Employment Survey (BRES) for this report.
- BRES is based on where businesses are located, rather than where employees live (i.e. work-based rather than resident-based).
- BRES includes self-employed workers (within the employment estimates) as long as they are registered for VAT or Pay As You Earn (PAYE) schemes. Self-employed people who are not registered for these, along with HM armed forces and government-supported trainees are not included.
- We also used the ONS's Annual Population Survey (APS) and Annual Survey of Hours & Earnings (ASHE). These provide resident-based data and hence numbers can differ from BRES.
- To understand the potential impact of COVID on our workforce, business and economy we have used analysis by the Office for Budget Responsibility (OBR) from mid-April 2020. This analysis is for the UK -we have taken the UK figures and applied these straight to the GVA (as a proxy to GDP), employment and wage numbers for Norfolk (all available through the Nomis, Norfolk Insight and ONS).
- Following the release of the Coronavirus Job Retention Scheme (CJRS) Official Statistics and we can now analyse estimates of the number and value of claims made to CJRS to HMRC broken down by:
    - Employer Size (National Only)
    - Sector of the Economy (SIC2007 National Only)
    - Geography (Local Authority)

Methodology and Caveats

- Geographic breakdowns of CJRS claims are based on an employee’s last known address to HMRC and geographic breakdowns do not directly translate to the employee’s usual place of work, or where their employer has a base of operations.
- In order to gain a local and regional view of the impact of furloughing, the Business Register and Employment Survey has been used to assess the total number of employments (not to be confused with employees). Taken this in conjunction with the CJRS reported estimates of furloughed employments, it is possible to estimate the percentage total of employments furloughed at a geographical level.

Summary – Baseline

- In 2017, Norfolk’s GVA totalled £19.99 billion (1% of the national GVA), there are 33,085 businesses and 367,000 employed people.
- The biggest employment sector in Norfolk are Human health and social activities, wholesale, retail and motor trades, Education and Manufacturing.
- The sectors that contributed most to Norfolk’s GVA are wholesale, retail and motor trades, Construction, and professional, scientific and technical activities.
- The sectors that contributed most to Norfolk’s GVA are Real estate/Property, Manufacturing, Wholesale, retail and motor trades, human health and social activities.
- Norfolk’s economy includes an overwhelmingly large proportion of micro and small businesses (98%).
- In 2019, 80.9% of Norfolk’s population between the age of 16-64 are economically active, and employment has been consistently higher than average (80.9%), of which 77.5% of employees and 3.9% are self employed.
- In April 2020, 23,305 people in Norfolk are on universal credit, of which 18 to 21 and 25 to 49 are the biggest age groups of claimant.

Summary – The impact of Covid-19 and related restrictions on Norfolk's workforce, businesses and economy

- From OBR analysis of the impact of Covid-19 shows a sharp impact. UK GDP is estimated to contract by 35% in Q2 2020. Applying this analysis to Norfolk's economy:
- Norfolk's total GVA will drop from £20 billion to £13 billion.
- The largest sectors in the County's in terms of GVA contributions are: Real Estate, Manufacturing, Wholesale, retail and motor trades
- They are forecasted to contract by 20% for real estate, 55% for Manufacturing, 50% for Wholesale, retail and motor trades
- The largest sectors in the County in terms of number of employees are: Wholesale, retail and motor trades, Human Health and Social activities, Manufacturing and Education
- Of these sectors, in GDP terms, Education is expected by contract by 90% (the most impacted).
- However, there is one notable growth in the Human Health and Social activities by a positive 55% in GDP. This sector employs around 55,000 people in Norfolk.
- But OBR estimates that GDP will recover to grow by 18% in 2021, compared to 2020 and then grow in line with the Chancellor's Budget forecast year-on-year until 2024.
- The OBR also provides estimates for year-on-year changes to average earnings, employment and unemployment numbers up to 2024. The unemployment number is expected to increase by over 16,000 in 2020. Average earnings are also set to drop by -7.3% over the same time period.
- 19% of all employee jobs across Norfolk are in the shut down sectors.

Economic Structure of the UK 2018

- In the UK, almost 30m people were employed across 2.7m businesses in 2018.
- 15% of employees worked in ‘Wholesale & retail trade, repair of motor vehicles’, 13% in ‘Health’ and 9% in ‘Education’.
- While in terms of business count the largest sectors were ‘Professional, scientific & technical’, ‘Wholesale & retail trade, repair of motor vehicles’ and ‘Construction’ and (17%, 14% and 13% respectively).
- The UK’s GVA was £1.9 trillion, the sectors contributing the most to the national GVA were: Property (13%), ‘Wholesale & retail trade, repair of motor vehicles’ (11%) and ‘Manufacturing (10%).

Sectors (SIC Code)	Jobs - 2018	Jobs - % by Sectors	Business Count	Businesses - % by sector	GVA 2018 (£millions)*
Agriculture, mining, electricity, gas, water and waste (ABDE)	616,000	2.1%	149,540	5.5%	82,986
Manufacturing (C)	2,405,000	8.1%	152,015	5.6%	189,291
Construction (F)	1,402,000	4.7%	343,715	12.6%	115,978
Wholesale and retail trade; repair of motor vehicles (G)	4,504,000	15.1%	389,105	14.3%	202,353
Transport & storage (inc postal) (H)	1,427,000	4.8%	111,360	4.1%	78,951
Accommodation & food services (I)	2,237,000	7.5%	157,035	5.8%	53,205
Information & communication (J)	1,256,000	4.2%	226,215	8.3%	134,063
Financial & insurance (K)	1,021,000	3.4%	60,630	2.2%	135,078
Property (L)	506,000	1.7%	100,340	3.7%	252,108
Professional, scientific & technical (M)	2,571,000	8.6%	471,715	17.4%	148,808
Business administration & support services (N)	2,678,000	9.0%	228,750	8.4%	102,056
Public administration & defence (O)	1,277,000	4.3%	7,505	0.3%	92,421
Education (P)	2,620,000	8.8%	44,490	1.6%	109,118
Health (Q)	3,908,000	13.1%	102,000	3.8%	145,111
Arts, entertainment, recreation & other services (R,S,T and U)	1,330,000	4.5%	174,020	6.4%	67,081
Total	29,758,000	100%	2,718,435	100%	1,908,608

Sources: ONS, BRES, APS, Business Demography, Reginal GVA (balanced) by industry

Economic Structure of Norfolk and Covid-19 projected impacts

- In 2018, there were approx. 367,000 jobs employed around 33,225 active businesses.
- The greatest concentration of employees were "Manufacturing", "Wholesale, retail and motor trades", "Education" and "Human Health and social activities"
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are "Education", "Manufacturing" and "Wholesale, retail and motor trades"
- "Manufacturing" and "Wholesale, retail and motor trades" carried the biggest weights in the overall GVA for the County

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	1235	510	1.5	9	33000	-1111.5	5214
Accommodation and food services (I)	-85%	669	2400	7.3	8.2	30000	-568.65	17940
Construction (F)	-70%	1420	4850	14.7	4.9	18000	-994	8208
Other services (Arts, entertainment and recreation) (RSTU)	-60%	715	2000	6.0	4.3	16000	-429	7632
Manufacturing (C)	-55%	2205	2035	6.2	9	33000	-1212.75	8778
Wholesale, retail and motor trades (G)	-50%	2115	5060	15.3	17.1	63000	-1057.5	23058
Information and communication (J)	-45%	455	1520	4.6	1.6	6000	-204.75	744
Professional, scientific and technical activities (M)	-40%	1071	4355	13.2	6	22000	-428.4	4378
Administrative and support activities (N)	-40%	732	2345	7.1	7.9	29000	-292.8	10556
Transport and storage (H)	-35%	572	1250	3.8	4.1	15000	-200.2	4785
Real estate / Property (L)	-20%	2423	1040	3.1	1.4	5000	-484.6	1650
Public administration and defence (O)	-20%	987	385	1.2	3.8	14000	-197.4	n/a
Mining, energy and water supply (BDE)	-20%	1288	210	0.6	1.6	6000	-257.6	1374
Financial and insurance services (K)	-5%	1216	520	1.6	3.5	13000	-60.8	n/a
Agriculture (A)	0%	1288	3360	10.2	2.4	9000	0	n/a
Human health and social activities (Q)	50%	1608	1245	3.8	14.9	55000	804	5060

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of Norwich and Covid-19 projected impacts

- In 2018, there were approx. 93,000 jobs employed around 5,445 active businesses.
- The greatest concentration of employees were "Wholesale, retail and motor trades", "Administrative and support services", "Education" and "Human health and social activities".
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are "Education" and "Wholesale, retail and motor trades" and "Administrative and support services".
- "Wholesale, retail and motor trades" , "Education" and "Real estate/Property" carry the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	389	110	2.4	11.8	11000	-350.1	1738
Accommodation and food services (I)	-85%	136	420	9.1	6.5	6000	-115.6	3588
Construction (F)	-70%	243	455	9.8	3.2	3000	-170.1	1368
Other services (Arts, entertainment and recreation) (RSTU)	-60%	218	355	7.6	5.9	6000	-130.8	2862
Manufacturing (C)	-55%	321	225	4.8	4.8	4500	-176.55	1197
Wholesale, retail and motor trades (G)	-50%	524	795	17.2	18.3	17000	-262	6222
Information and communication (J)	-45%	195	360	7.8	3.2	3000	-87.75	372
Professional, scientific and technical activities (M)	-40%	313	780	16.8	6.5	6000	-125.2	1194
Administrative and support activities (N)	-40%	219	335	7.2	12.9	12000	-87.6	4368
Transport and storage (H)	-35%	154	195	4.2	5.4	5000	-53.9	1595
Real estate / Property (L)	-20%	366	190	4.1	2.2	2000	-73.2	660
Public administration and defence (O)	-20%	341	5	0.1	5.4	5000	-68.2	n/a
Mining, energy and water supply (BDE)	-20%	34	15	0.9	1.4	350	-6.8	80.15
Financial and insurance services (K)	-5%	171	110	2.4	3.8	3500	-8.55	n/a
Agriculture (A)	0%	34	30	0.6	n/a	0	0	n/a
Human health and social activities (Q)	50%	202	270	5.8	8.6	8000	101	736

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of Broadland and Covid-19 projected impacts

- In 2018, there were approx. 47,000 jobs employed around 5320 active businesses.
- The greatest concentration of employees were "Wholesale, retail and motor trades", "Financial and insurance services" and "Human health and social activities".
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are "Accommodation and Food services", "Manufacturing", "Construction" and "Wholesale, retail and motor trades"
- "Financial and Insurance services", "Real estate/Property"" and "Manufacturing" carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	123	70	1.4	7.3	3500	-110.7	553
Accommodation and food services (I)	-85%	55	230	4.7	6.2	3000	-46.75	1794
Construction (F)	-70%	221	925	19.2	6.2	3000	-154.7	1368
Other services (Arts, entertainment and recreation) (RSTU)	-60%	73	265	5.5	2.6	1250	-43.8	596.25
Manufacturing (C)	-55%	291	320	6.6	9.4	4500	-160.05	1197
Wholesale, retail and motor trades (G)	-50%	272	695	14.3	16.2	7750	-136	2836.5
Information and communication (J)	-45%	69	265	5.5	1.9	900	-31.05	111.6
Professional, scientific and technical activities (M)	-40%	123	655	13.6	5.2	2500	-49.2	497.5
Administrative and support activities (N)	-40%	68	325	6.7	6.2	3000	-27.2	1092
Transport and storage (H)	-35%	36	150	3.1	2.6	1250	-12.6	398.75
Real estate / Property (L)	-20%	358	185	3.8	1.7	800	-71.6	264
Public administration and defence (O)	-20%	85	50	1.1	2.6	1250	-17	n/a
Mining, energy and water supply (BDE)	-20%	82	30	0.6	2.1	1000	-16.4	229
Financial and insurance services (K)	-5%	831	100	2	12.5	6000	-41.55	n/a
Agriculture (A)	0%	82	380	7.9	1.7	800	0	n/a
Human health and social activities (Q)	50%	168	185	3.8	14.6	7000	84	644

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of South Norfolk and Covid-19 projected impacts

- In 2018, there were approx. 53,000 jobs employed around 5,505 active businesses.
- The greatest concentration of employees were “Human Health and social activities”, “Wholesale, retail and motor trades” and “Manufacturing “ and “Education”.
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are “Education", "Construction” “Manufacturing”, “Wholesale, retail and motor trades” and “Accommodation and food services”.
- “Human Health and social activities”, “Real estate/Property”” “Wholesale, retail and motor trades” and “Construction” carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	144	95	1.6	7.4	4000	-129.6	632
Accommodation and food services (I)	-85%	74	290	5	6.5	3500	-62.9	2093
Construction (F)	-70%	242	825	14.2	5.6	3000	-169.4	1368
Other services (Arts, entertainment and recreation) (RSTU)	-60%	102	310	5.3	3.7	2000	-61.2	954
Manufacturing (C)	-55%	192	335	5.8	7.4	4000	-105.6	1064
Wholesale, retail and motor trades (G)	-50%	295	745	12.7	14.3	7750	-147.5	2836.5
Information and communication (J)	-45%	69	330	5.7	1.7	900	-31.05	111.6
Professional, scientific and technical activities (M)	-40%	157	910	15.6	7.4	4000	-62.8	796
Administrative and support activities (N)	-40%	94	405	6.9	5.6	3000	-37.6	1092
Transport and storage (H)	-35%	61	215	3.7	2.8	1500	-21.35	478.5
Real estate / Property (L)	-20%	378	175	3	1.3	700	-75.6	231
Public administration and defence (O)	-20%	129	85	1.4	3.7	2000	-25.8	n/a
Mining, energy and water supply (BDE)	-20%	222	35	0.6	2.3	1250	-44.4	286.25
Financial and insurance services (K)	-5%	27	110	1.9	1.1	600	-1.35	n/a
Agriculture (A)	0%	222	720	12.4	2.3	1250	0	n/a
Human health and social activities (Q)	50%	523	245	4.2	27.8	15000	261.5	1380

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of Breckland and Covid-19 projected impacts

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- In 2018, there were approx. 46,000 jobs employed around 4,755 active businesses.
- The greatest concentration of employees were “Human Health and social activities”, “Wholesale, retail and motor trades” and “Manufacturing “.
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are “Education”, “Manufacturing”, “Wholesale, retail and motor trades”, “Administrative and support activities” and “Accommodation and food services”
- “Manufacturing”, “Real estate/Property”” “Agriculture” and “Mining, energy and water supply” carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	138	85	1.6	8.5	4000	-124.2	632
Accommodation and food services (I)	-85%	56	275	5.4	5.3	2500	-47.6	1495
Construction (F)	-70%	192	690	13.6	6.4	3000	-134.4	1368
Other services (Arts, entertainment and recreation) (RSTU)	-60%	101	295	5.8	3.7	1750	-60.6	834.75
Manufacturing (C)	-55%	509	385	7.6	17	8000	-279.95	2128
Wholesale, retail and motor trades (G)	-50%	286	780	15.4	17.6	8250	-143	3019.5
Information and communication (J)	-45%	43	180	3.5	1.1	500	-19.35	62
Professional, scientific and technical activities (M)	-40%	145	605	11.9	6.4	3000	-58	597
Administrative and support activities (N)	-40%	119	375	7.4	8.5	4000	-47.6	1456
Transport and storage (H)	-35%	106	230	4.5	5.3	2500	-37.1	797.5
Real estate / Property (L)	-20%	355	135	2.7	1.3	600	-71	198
Public administration and defence (O)	-20%	101	70	1.4	3.2	1500	-20.2	n/a
Mining, energy and water supply (BDE)	-20%	331	30	0.6	1.7	800	-66.2	183.2
Financial and insurance services (K)	-5%	40	70	1.4	0.9	400	-2	n/a
Agriculture (A)	0%	331	735	14.4	3.2	1500	0	n/a
Human health and social activities (Q)	50%	114	150	2.9	10.6	5000	57	460

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of Great Yarmouth and Covid-19 projected impacts

- In 2018, there were approx. 37,000 jobs employed around 3,040 active businesses.
- The greatest concentration of employees were “Human Health and social activities”, “Wholesale, retail and motor trades” and “Accommodation and food services “.
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are “Accommodation and food services”, “Wholesale, retail and motor trades”, “Other services” and “Education”
- “Human health and social activities”, “Wholesale, retail and motor trades”, “Real estate/Property”” carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	114	20	0.7	8.1	3000	-102.6	474
Accommodation and food services (I)	-85%	120	360	12.7	16.2	6000	-102	3588
Construction (F)	-70%	105	405	14.2	4.1	1500	-73.5	684
Other services (Arts, entertainment and recreation) (RSTU)	-60%	89	195	6.9	5.4	2000	-53.4	954
Manufacturing (C)	-55%	147	200	7.1	6.8	2500	-80.85	665
Wholesale, retail and motor trades (G)	-50%	168	450	15.7	17.5	6450	-84	2360.7
Information and communication (J)	-45%	26	70	2.5	0.9	350	-11.7	43.4
Professional, scientific and technical activities (M)	-40%	161	410	14.5	6.8	2500	-64.4	497.5
Administrative and support activities (N)	-40%	74	230	8.2	4.7	1750	-29.6	637
Transport and storage (H)	-35%	50	110	3.9	4.1	1500	-17.5	478.5
Real estate / Property (L)	-20%	195	75	2.7	0.6	225	-39	74.25
Public administration and defence (O)	-20%	55	20	0.8	2.4	900	-11	n/a
Mining, energy and water supply (BDE)	-20%	124	30	1.1	2.7	1000	-24.8	229
Financial and insurance services (K)	-5%	11	35	1.3	0.8	300	-0.55	n/a
Agriculture (A)	0%	124	115	4	0.8	300	0	n/a
Human health and social activities (Q)	50%	218	105	3.7	18.9	7000	109	644

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of North Norfolk and Covid-19 projected impacts

- In 2018, there were 31,000 jobs employed around 3,980 active businesses.
- The greatest concentration of employees were "Human Health and social activities", "Wholesale, retail and motor trades" and "Construction" and "Accommodation and food services ".
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are "Accommodation and food services", "Wholesale, retail and motor trades", Human Health and social activities" and "Education".
- "Real estate/Property", "Wholesale, retail and motor trades" , "Agriculture" and "Mining , energy and water supply" carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	126	55	1.3	9.1	3000	-113.4	474
Accommodation and food services (I)	-85%	114	440	10.2	13.6	4500	-96.9	2691
Construction (F)	-70%	134	595	13.8	4.5	1500	-93.8	684
Other services (Arts, entertainment and recreation) (RSTU)	-60%	107	280	6.5	6.1	2000	-64.2	954
Manufacturing (C)	-55%	134	240	5.6	9.1	3000	-73.7	798
Wholesale, retail and motor trades (G)	-50%	184	705	16.4	18.7	6200	-92	2269.2
Information and communication (J)	-45%	16	145	3.3	1.1	350	-7.2	43.4
Professional, scientific and technical activities (M)	-40%	73	425	9.9	5.3	1750	-29.2	348.25
Administrative and support activities (N)	-40%	55	295	6.8	3.8	1250	-22	455
Transport and storage (H)	-35%	82	115	2.7	3.8	1250	-28.7	398.75
Real estate / Property (L)	-20%	345	130	3	1.4	450	-69	148.5
Public administration and defence (O)	-20%	82	80	1.9	3	1000	-16.4	n/a
Mining, energy and water supply (BDE)	-20%	168	25	0.5	2.1	700	-33.6	160.3
Financial and insurance services (K)	-5%	62	35	0.8	0.8	250	-3.1	n/a
Agriculture (A)	0%	168	615	14.3	4.5	1500	0	n/a
Human health and social activities (Q)	50%	95	130	3	12.1	4000	47.5	368

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

Economic Structure of King's Lynn and West Norfolk and Covid-19 projected impacts
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- In 2018, there were approx. 53,000 jobs employed around 5,180 active businesses.
- The greatest concentration of employees were "Wholesale, retail and motor trades", "Human health and social activities" and "Manufacturing".
- Taking into consideration of number of employees, the sectors most impacted by the Covid-19 are "Manufacturing"" and "Wholesale, retail and motor trades", "Accommodation and food services", "Construction" and "Administrative and support activities".
- "Manufacturing", "Real estate/Property" and "Wholesale, retail and motor trades" carried the biggest weights in the overall GVA for this district.

Sectors	Effect on output	GVA by broad industry group £m	Businesses by industry (Count)	Businesses by industry (%)	% of employee jobs	No. employees	£m annualised contraction	Estimated No. Furloughed
Education (P)	-90%	201	75	1.4	7.9	4500	-180.9	711
Accommodation and food services (I)	-85%	114	385	7	7.9	4500	-96.9	2691
Construction (F)	-70%	283	955	17.2	5.3	3000	-198.1	1368
Other services (Arts, entertainment and recreation) (RSTU)	-60%	25	300	5.4	2.6	1500	-15	715.5
Manufacturing (C)	-55%	611	330	5.9	12.3	7000	-336.05	1862
Wholesale, retail and motor trades (G)	-50%	386	890	16.1	17.1	9750	-193	3568.5
Information and communication (J)	-45%	37	170	3.1	0.8	450	-16.65	55.8
Professional, scientific and technical activities (M)	-40%	99	570	10.2	4.4	2500	-39.6	497.5
Administrative and support activities (N)	-40%	103	380	6.8	7	4000	-41.2	1456
Transport and storage (H)	-35%	83	235	4.2	3.5	2000	-29.05	638
Real estate / Property (L)	-20%	426	150	2.7	1.2	700	-85.2	231
Public administration and defence (O)	-20%	194	75	1.3	4.4	2500	-38.8	n/a
Mining, energy and water supply (BDE)	-20%	327	45	0.8	1.8	1000	-65.4	229
Financial and insurance services (K)	-5%	74	60	1.1	2.2	1250	-3.7	n/a
Agriculture (A)	0%	327	765	13.8	5.3	3000	0	n/a
Human health and social activities (Q)	50%	288	160	2.9	14	8000	144	736

Sources: ONS (BICS Wave 4 20th April – 3rd May), OBR, Norfolk Insight, GVA is used as a proxy for GDP for this exercise.

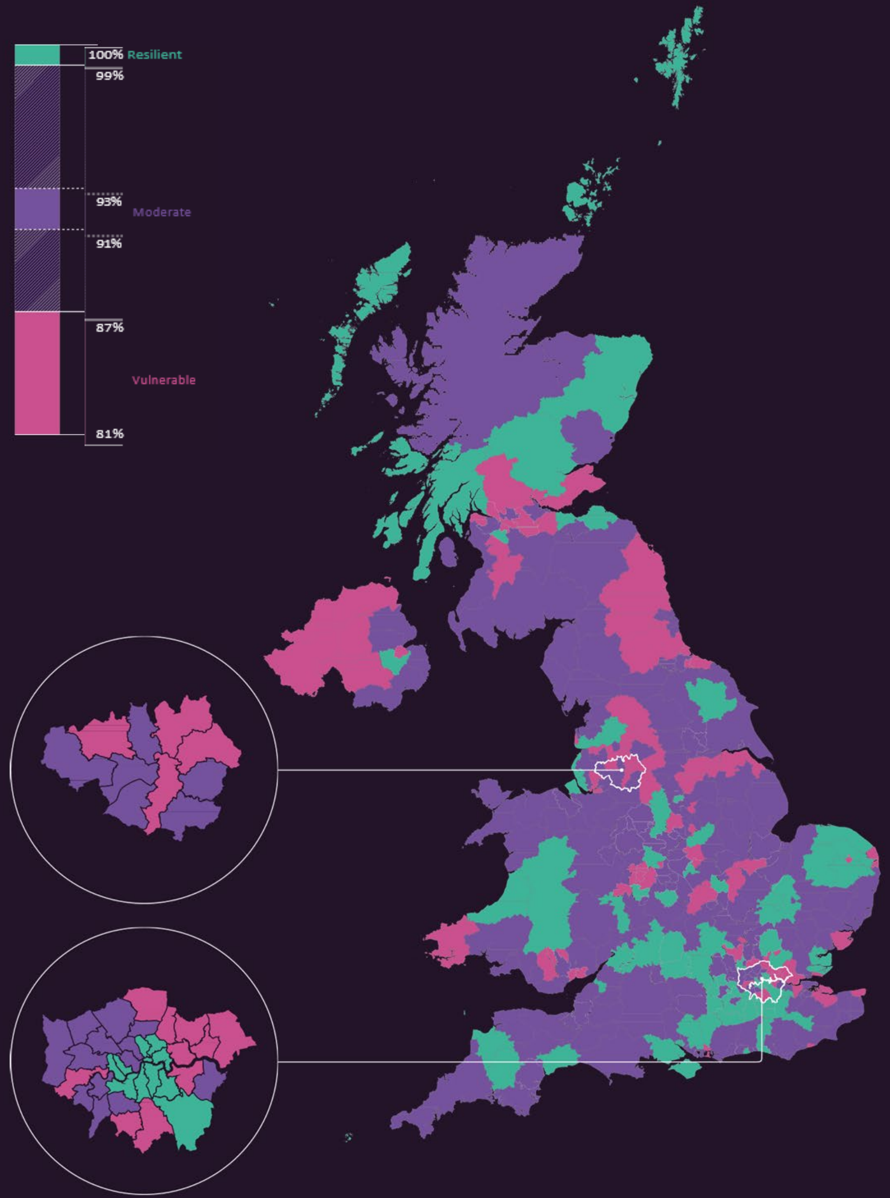
GVA was calculated for the Agriculture (A) and Mining, energy and water (BDE) sectors combined. Separate values are not available.

An analysis by the Centre for Progressive Policy (16 April, CPP) finds that the predicted economic impact of coronavirus will vary significantly across the country, with areas in the Midlands and the North West showing the steepest declines in economic output (close to 50%) in Q2. The analysis has been done weighting the average sectoral hit (calculated by the OBR) by the distribution of each local authority's GVA by sector.

In Norfolk, Norwich is shown as the worst affected, closely followed by Breckland and North Norfolk. South Norfolk is shown as the least affected.

Local Authority	Decline in GVA	National rank (out of 382)
Norwich	41%	67
Breckland	41%	85
North Norfolk	39%	153
King's Lynn and West Norfolk	38%	172
Great Yarmouth	35%	251
Broadland	32%	337
South Norfolk	25%	378 (5th lowest)

Source: Centre for Progressive Policy "Which Local authorities face the biggest immediate economic hit"

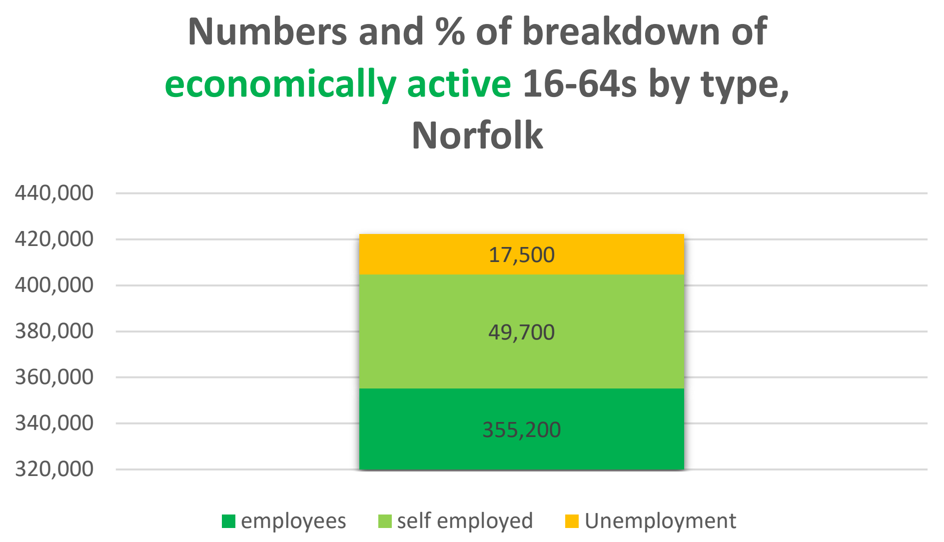


Centre for Progressive Policy also ran a longer term trajectory of the impact of the Covid19 on local authority areas. The map shows GVA indexed to pre-crisis trend 5 years after lockdown by local authority. Local authorities are placed into 3 groups – vulnerable, resilient or moderate. In Norfolk, Great Yarmouth and Norwich have been classified as vulnerable.

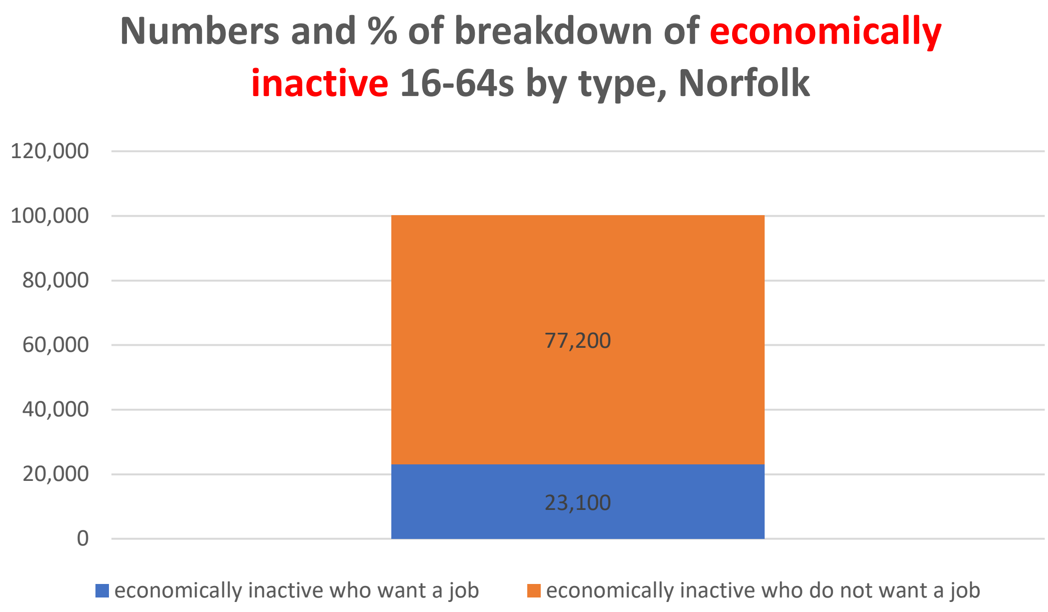
Local Authority	Recovery category
Breckland	Resilient
Broadland	Resilient
Great Yarmouth	Vulnerable
King's Lynn and West Norfolk	Moderate
North Norfolk	Resilient
Norwich	Vulnerable
South Norfolk	Resilient

Source: Centre for Progressive Policy “Back from the Brink” May 2020

In 2019, over 420,000 (81%) of 16-64s were economically active, and over 100,000 (19%) who are economically inactive.



The majority of economically active 16-64s were either employees (68%) or self employed (10%). While 4% were unemployed.

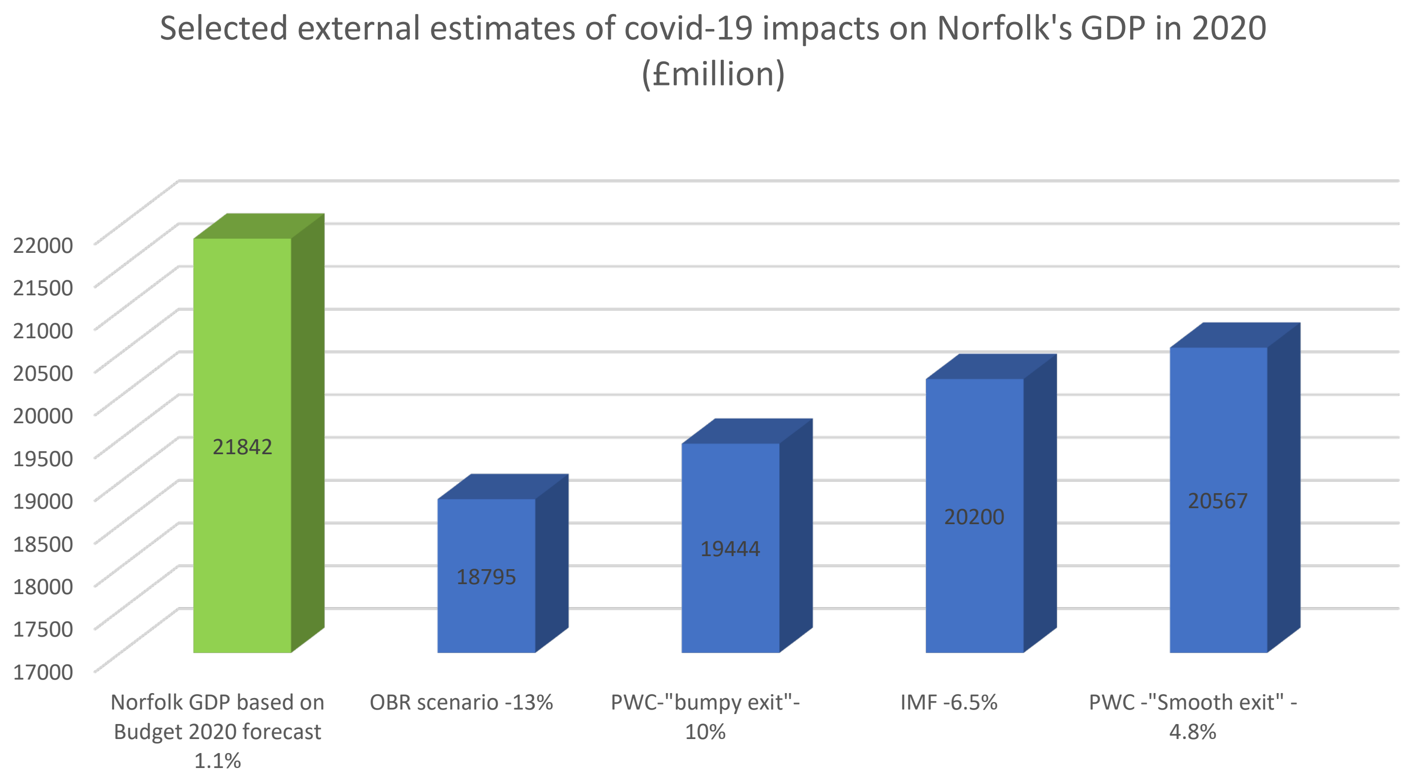


23% of economically inactive 16-64s who wants a job.

Source: Nomis

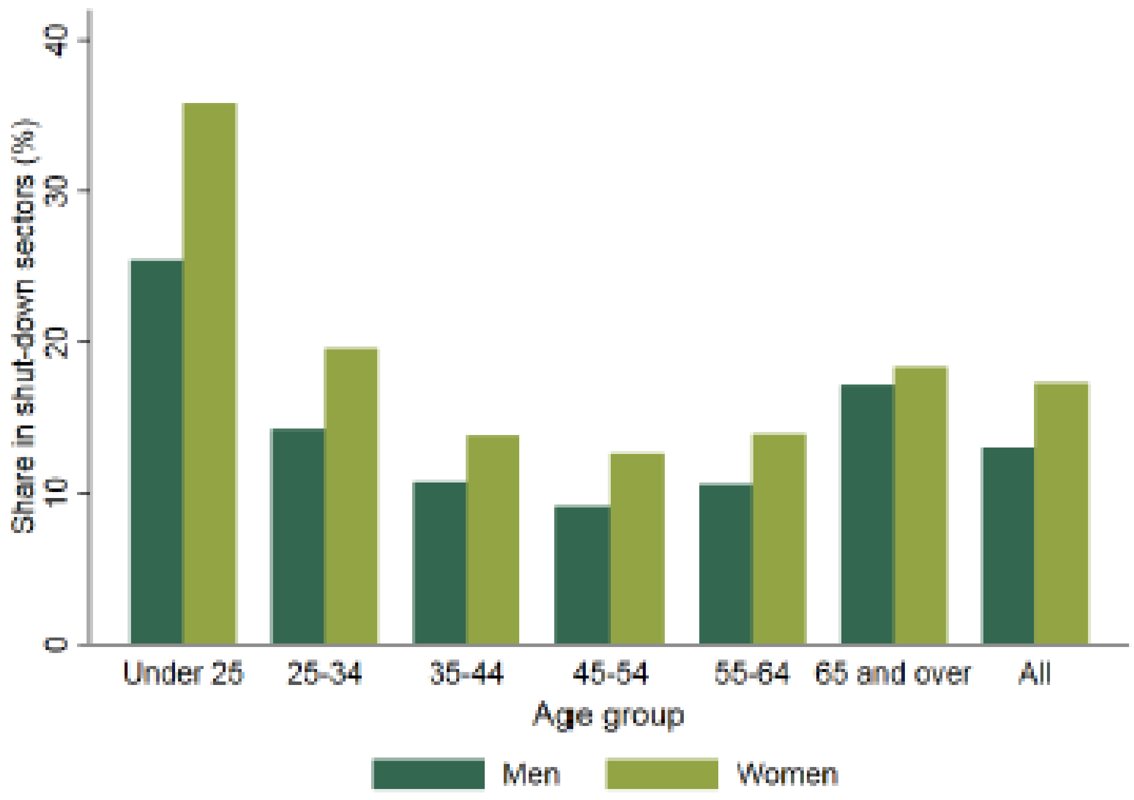
Norfolk’s GDP was £21,604 million in 2019. In the Government’s Budget 2020, GDP was predicted to grow by 1.1% nationally. There is increasing number of external estimates of the potential impact of Covid outbreak on UK GDP.

For example, the OBR provides a short term horizon for their scenario, anticipating a 35% fall in GDP in Q2 2020(vs. Q1 2020) if lockdown continues through June. In their scenario, GDP then picks up to average -13% for 2020 overall (vs 2019).



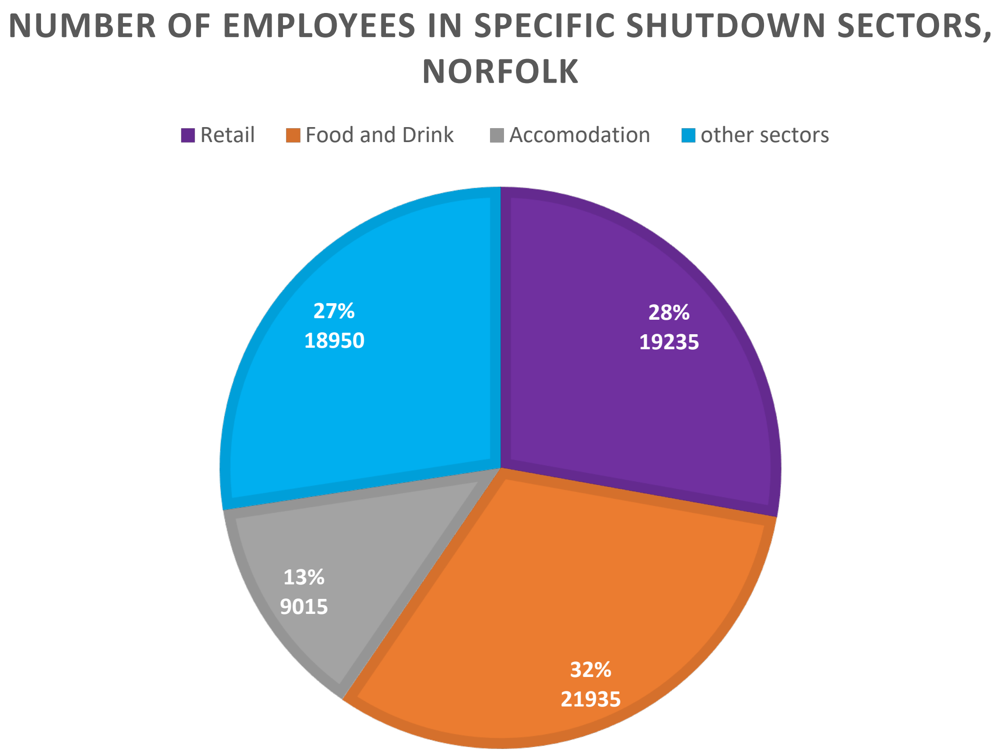
Sources: OBR, ONS, PWC

The institute of Fiscal Studies suggests that the lockdown will hit young workers the hardest. Employees aged under 25 were about 2.5 times as likely to work in a sector that is now shut down as other employees. Also, women were found to be more affected as they disproportionately work in retail and hospitality.



Source: Quarterly Labour Force Survey
01-04-2019, waves 1 and 5 only

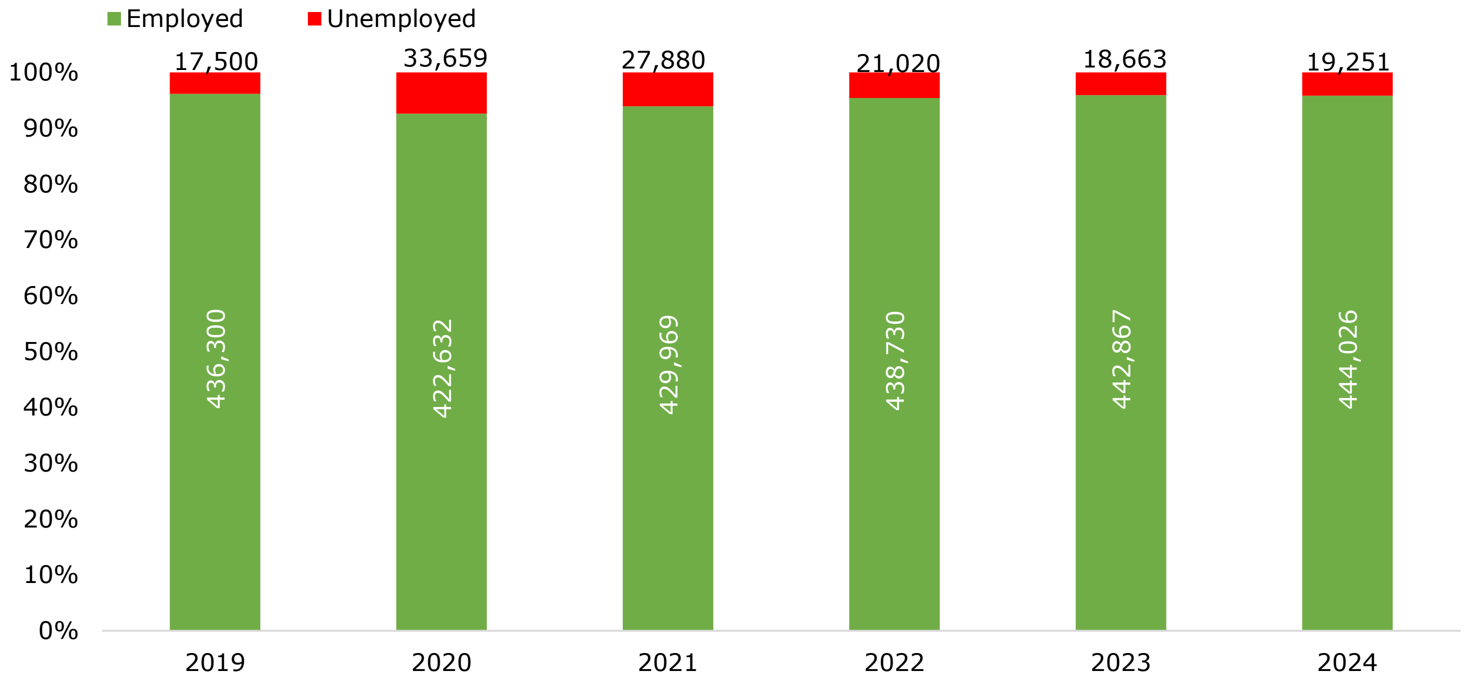
19% of all employee jobs across Norfolk are in the shut down sectors. Of which, 73% of those in the shut down sectors are in Retail (28%), Food and Drink (32%) and Accommodation sectors (13%).



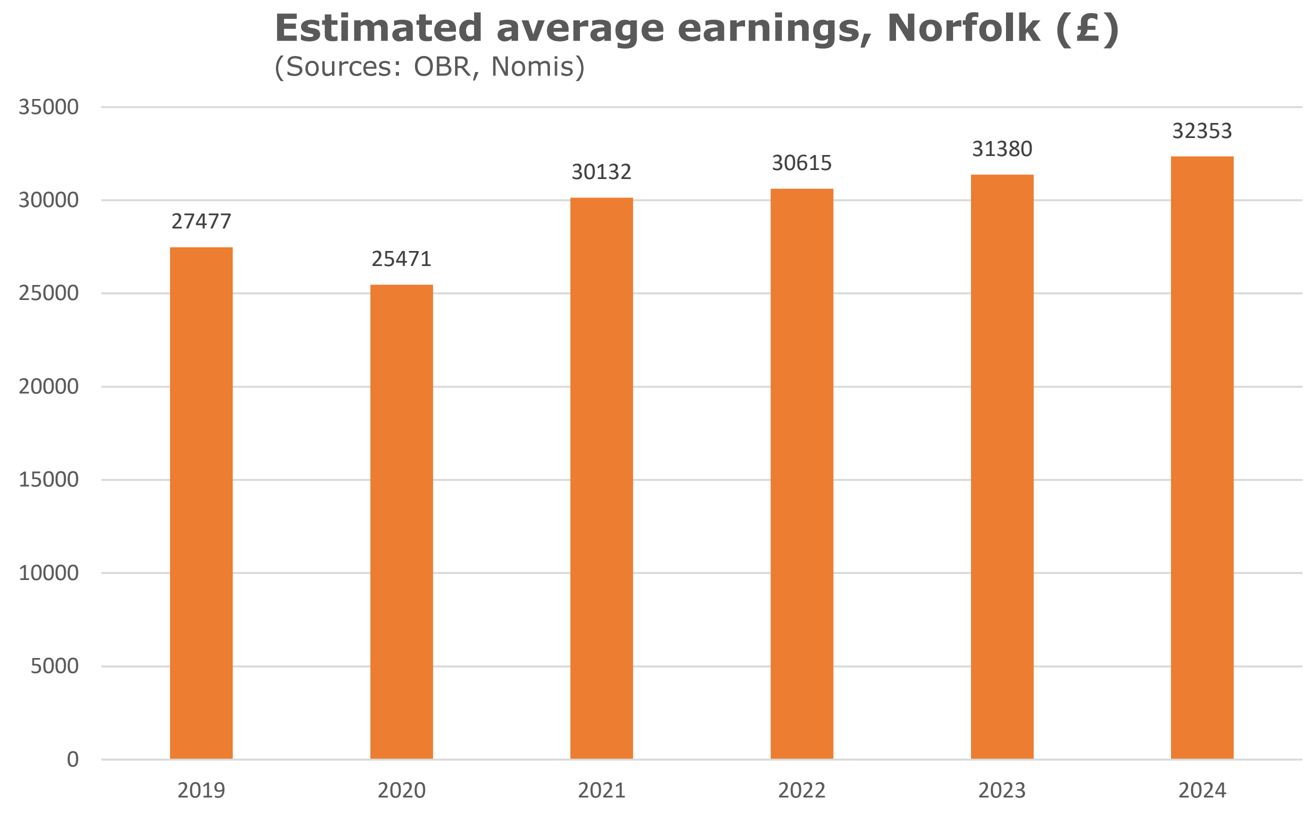
Source: NOMIS, ONS BRES Survey 2019

The OBR also provided estimates for year-on-year changes to employment and unemployment numbers up to 2024. The number of unemployed in expected to increase by 16,159 in 2020.

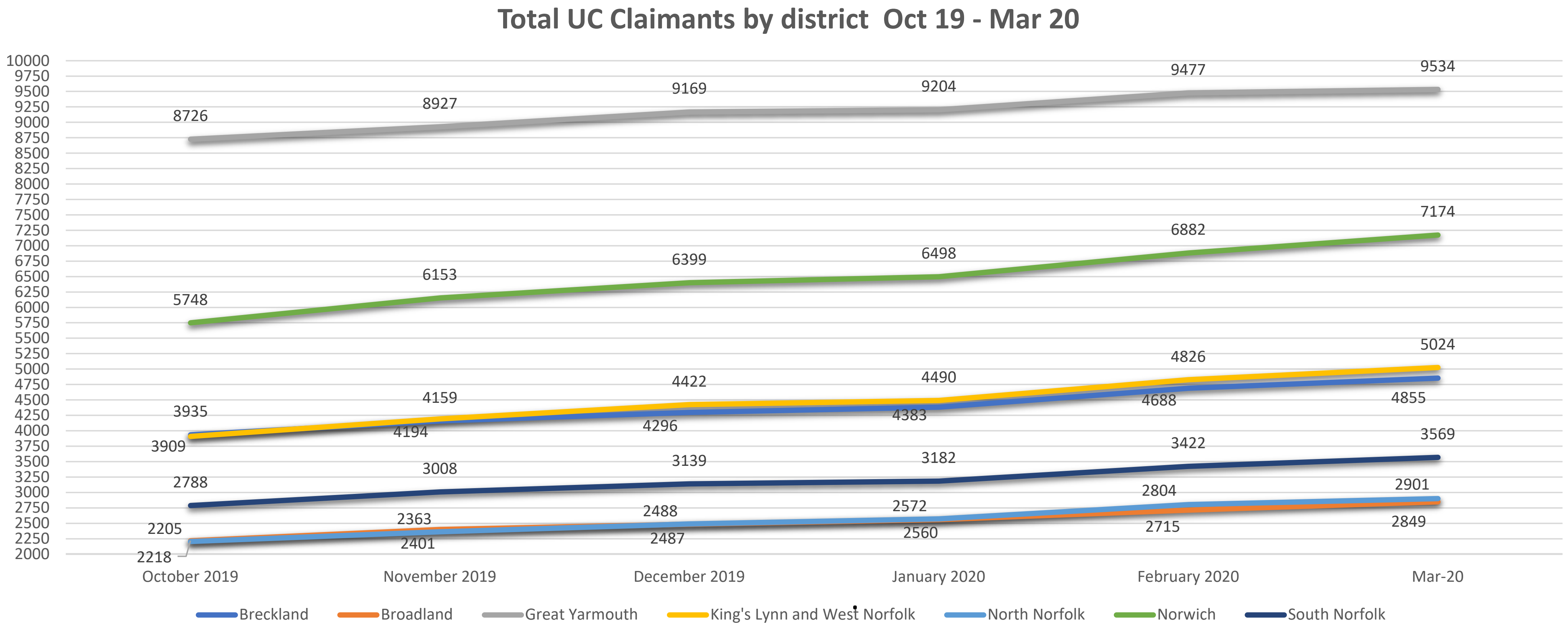
Estimated employment numbers and % breakdown, Norfolk
(Sources: OBR, Nomis)



The OBR also provided estimates for year-on-year changes to average earnings up to 2024. Average earnings expected drop by -7.3% which is to £25,471.

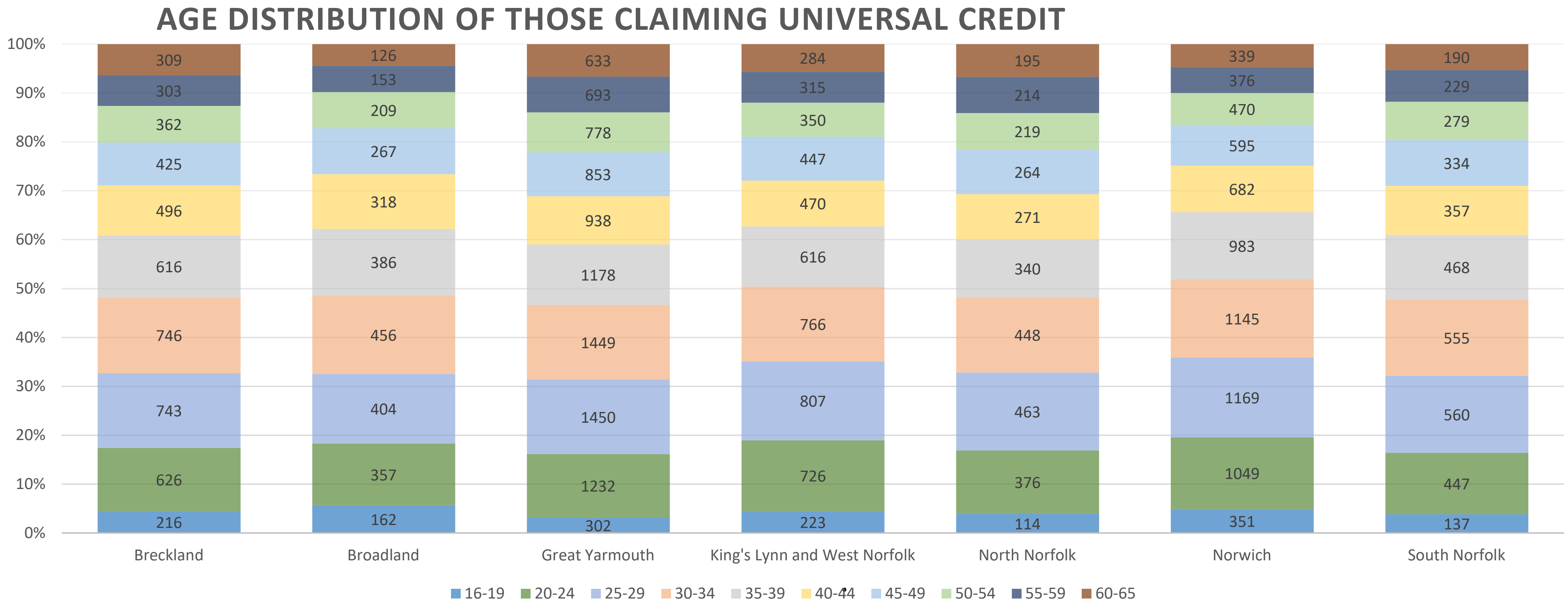


In March 2020, 35,906 people in Norfolk were on Universal Credit. The highest proportion were in Great Yarmouth with 9,534 claimants (26.5% of Norfolk total) followed by Norwich (7,174claimants = 19.9%).



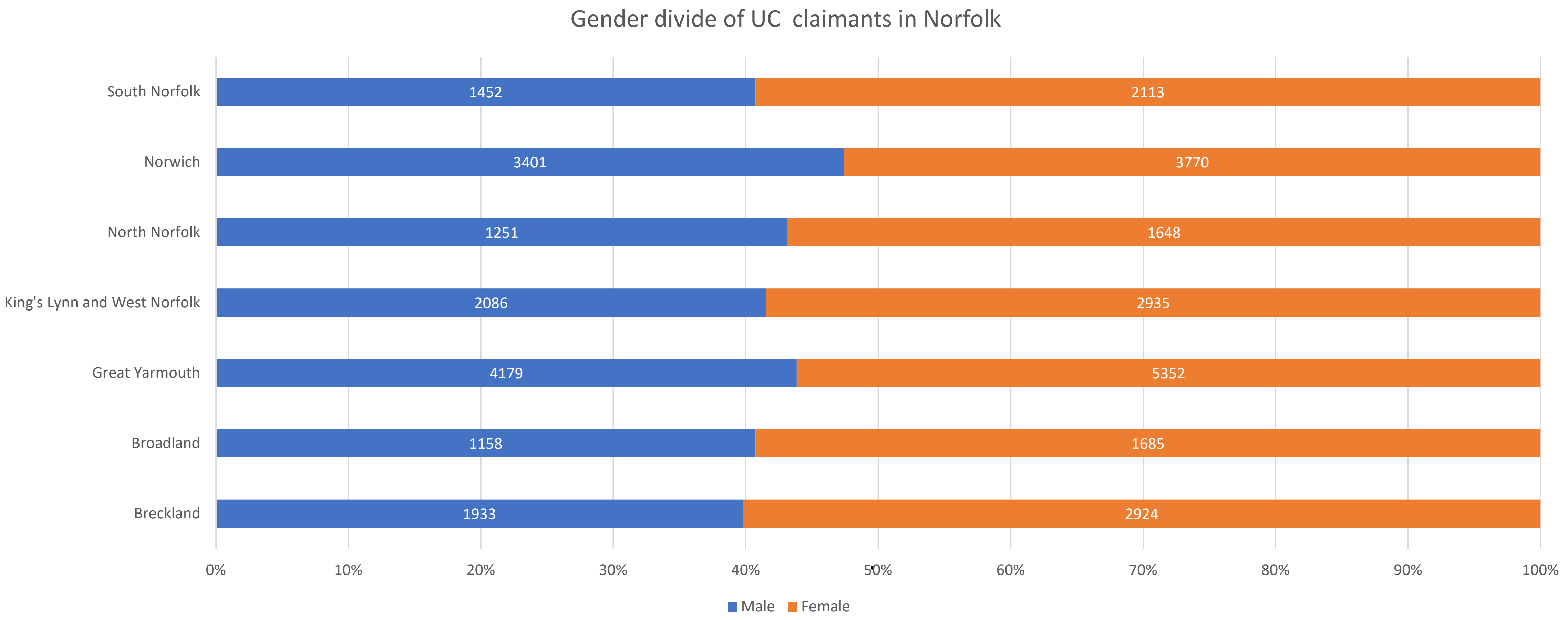
Source: DWP via Stat-Xplore

Across Norfolk, 15.5% of claimants are aged between 25 and 29 years old, while 15.4% were between 30 and 34, making up the two largest groups.



Source: DWP via Stat-Xplore

The split of UC claimants by gender across the districts of Norfolk.



Source: DWP via Stat-Xplore

The majority of UC claimants in Norfolk, 22,585 (62%) are not in employment, with 12,933 of these searching, planning or preparing for work.

Number of UC claimants by Conditionality Regime and Employment Status – March 2020 (source: DWP via Stat-Xplore)

		Searching for work	Working – with requirements	No work requirements	Planning for work	Working – no requirements	Preparing for work	Total
Breckland	Not in employment	1163	148	1024	112	126	292	2870
	In employment	258	606	214	31	835	37	1983
Broadland	Not in employment	738	74	560	62	101	162	1697
	In employment	177	336	103	18	484	28	1149
Great Yarmouth	Not in employment	2323	287	2590	216	167	712	6292
	In employment	557	1144	331	41	1080	94	3245
King's Lynn and West Norfolk	Not in employment	1449	131	949	145	131	329	3137
	In employment	320	587	197	39	709	34	1888
North Norfolk	Not in employment	809	89	606	80	70	169	1826
	In employment	170	359	111	9	397	28	1071
Norwich	Not in employment	2261	202	1350	178	158	479	4625
	In employment	451	889	254	45	844	60	2550
South Norfolk	Not in employment	967	88	692	80	108	207	2138
	In employment	206	408	148	17	616	35	1426

Main Points

The key points from this release are:

•The total number of employers that made at least one CJRS claim to 31 May 2020 is **1.07 million**.

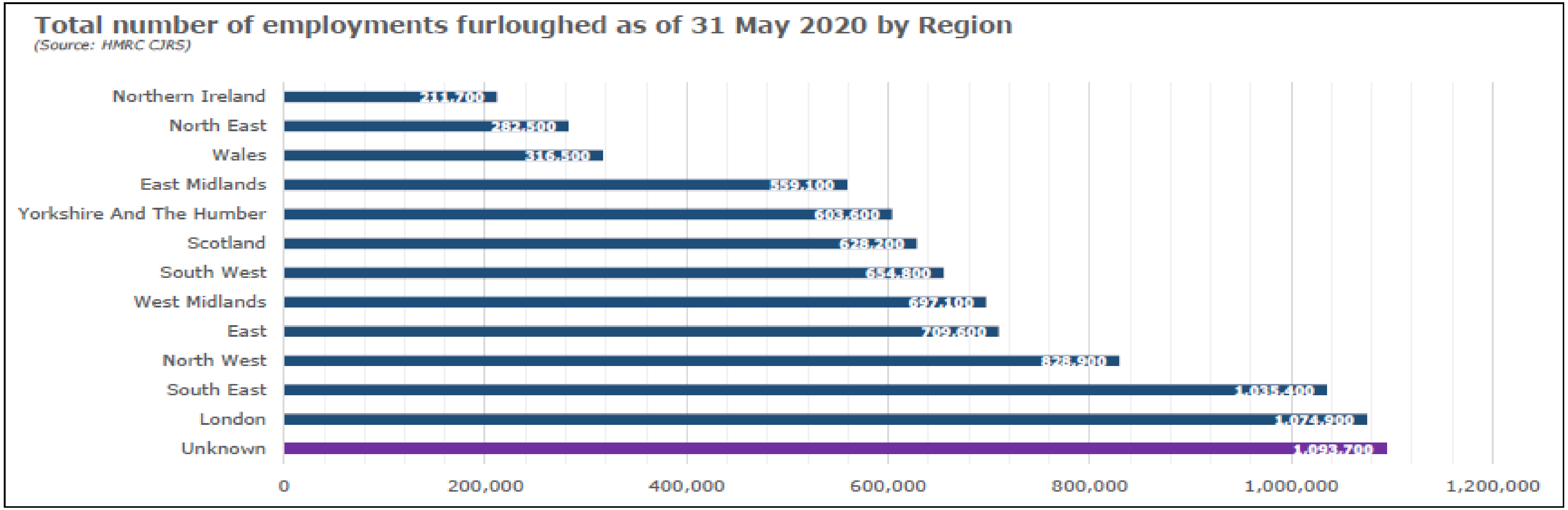
•8.7 million employments have been supported through the scheme under claims made until 31 May, with these claims totalling **£17.5 billion.**

•6,300 large employers (those with 250 or more employees) have furloughed around 2.5 million employments.

•Employers identified as operating in the wholesale and retail sector have made CJRS claims covering 1.6 million employments with a claim value of £3.3 billion.

•Accommodation and food services employers have furloughed 1.4 million employments and claimed £2.6 billion in support under the CJRS.

•Construction sector employers have made CJRS claims covering 680,000 employments with claims totalling £1.8 billion.



Sectors – National

1.1 million employers furloughed employments up to 31 May 2020, with the largest employers furloughing found in 'Wholesale and retail trade', 'Construction' and 'Professional, scientific & technical' of 154,400, 161,500 and 126,500 respectively.

There is significant weighing out employments furloughed to that of 'Wholesale and retail trade', 'Transport & storage' and 'Construction' of 18.5%, 16.1% 9.6% respectively. However it is worth noting that the Unknown sector (where a CJRS claim has not been able to match to other HMRC data) constitutes 12.5% of all furloughed employments, so the sector split could shift when these are resolved.

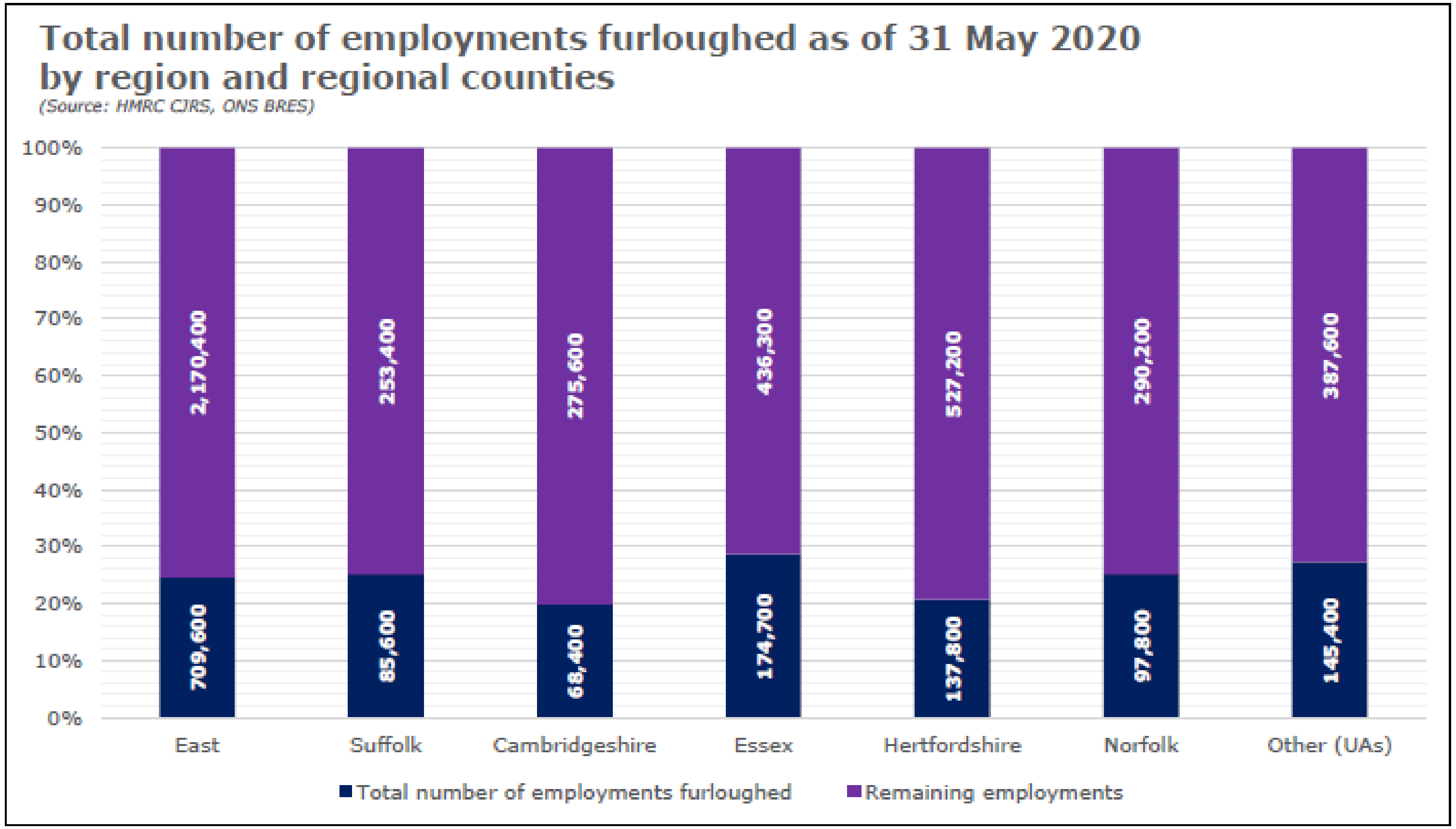
Sector (SIC 2007 Code)	Total number of employers furloughing	Total number of employments furloughed	% split of employments furloughed
Agriculture, mining, electricity, gas, water and waste (ABDE)	13,100	96,800	1.1%
Manufacturing (C)	67,400	831,000	9.6%
Construction (F)	154,400	679,600	7.8%
Wholesale and retail trade; repair of motor vehicles (G)	161,900	1,609,800	18.5%
Transport & storage (inc postal) (H)	36,500	303,300	3.5%
Accommodation & food services (I)	102,000	1,403,300	16.1%
Information & communication (J)	47,600	168,000	1.9%
Financial & insurance (K)	12,500	62,800	0.7%
Property (L)	25,200	128,500	1.5%
Professional, scientific & technical (M)	126,500	495,800	5.7%
Business administration & support services (N)	88,800	644,800	7.4%
Public administration & defence (O)	400	4,400	0.1%
Education (P)	20,800	213,400	2.5%
Health (Q)	47,000	332,000	3.8%
Arts, entertainment, recreation & other services (R,S,T and U)	97,600	632,800	7.3%
Unknown	66,000	1,089,600	12.5%
Total	**1,067,700**	**8,696,000**	**100.0%**

Source: ONS

Employments Furloughed –Region and Regional Counties

Of a total 2.9 million employments in East of England, 709,600 have been furloughed, representing 24.6%, this is slightly higher than the England furlough rate of 24.0%.

At a county level, Norfolk has 387,500 employments with 25.2% of those being furloughed (97,800). Comparatively against other counties in the region, Norfolk has the 4th highest furlough rate behind Essex (28.6%) and Other (UAs)* (27.3%) and Suffolk Norfolk (25.3%) followed by Hertfordshire (20.7%) and Cambridgeshire (19.9%), both of which are below the national and regional rates

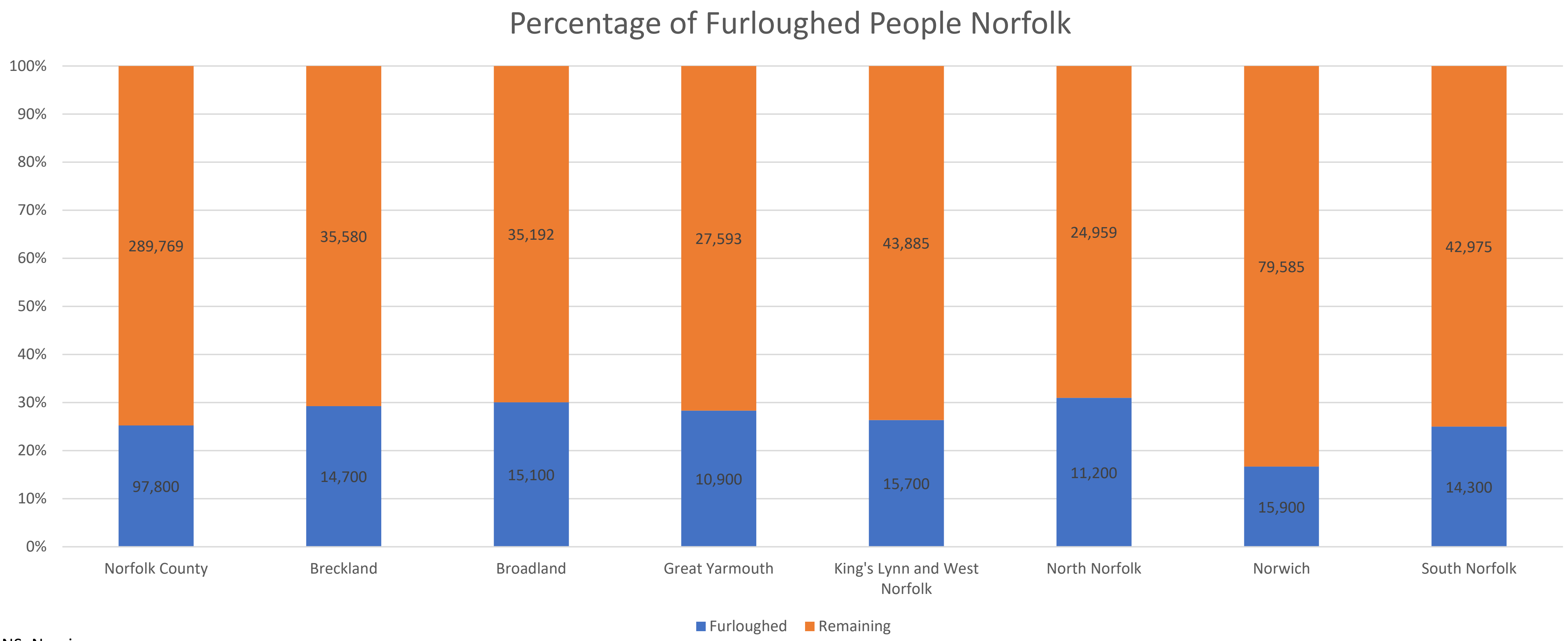


(UAs) is comprised of: Bedford UA, Central Bedfordshire UA, Luton UA, Peterborough UA, Southend-on-Sea UA and Thurrock UA

Employments Furloughed –County & District

Of a total 387,500 employments in Norfolk, 97,800 have been furloughed, representing 25.2%, this is slightly higher than the East furlough rate of 24.5% and England furlough rate of 24.0%,

At a district level, North Norfolk has a significantly higher rates of furloughing at 31.0%, followed by Broadland at 30.0% while Norwich and South Norfolk, at 16.7% and 25.0% respectively.



Sources: ONS, Nomis

Thank You