Local Authority EU Transition Exposure Dashboards

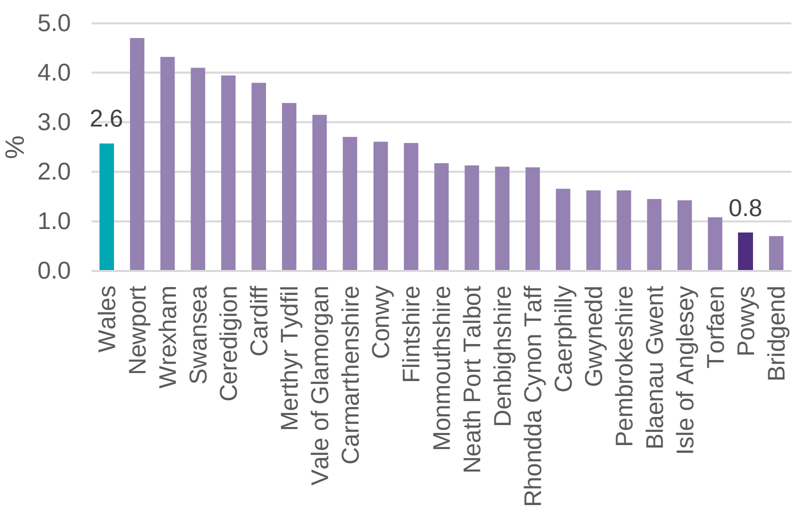
Powys

2020 update

Powys. People

EU residents

Proportion of population that are non-UK EU born residents



Long-term international migration

'Net migration' shows how many more people are coming to live in the UK than leaving the UK to live abroad

Net migration (total)
Wales: 7,812
UK: 230,514

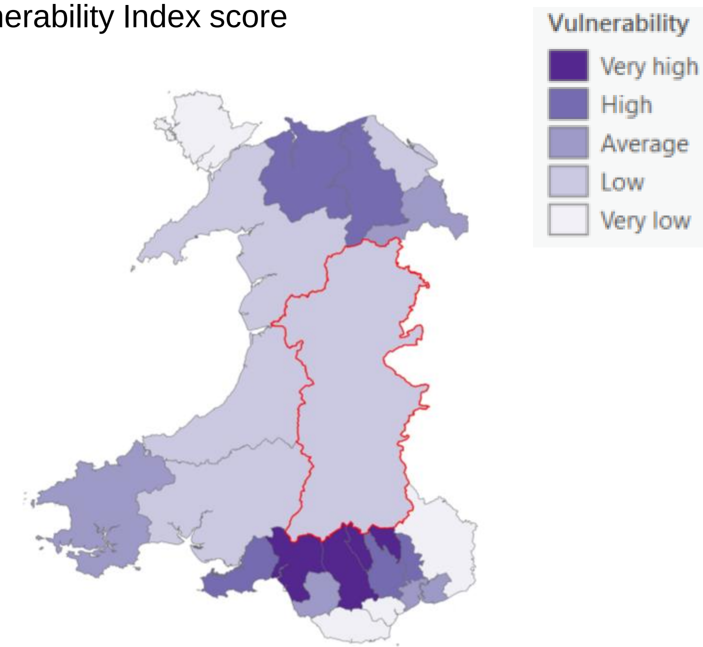
Powys
161

Net migration (per 1,000 pop)
Wales: 2.5
UK: 3.5

Powys
1.2

Community Vulnerability Index

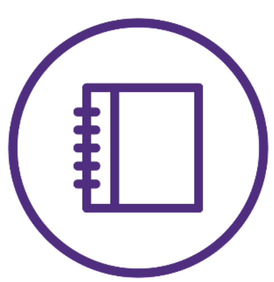
Vulnerability Index score



Skills

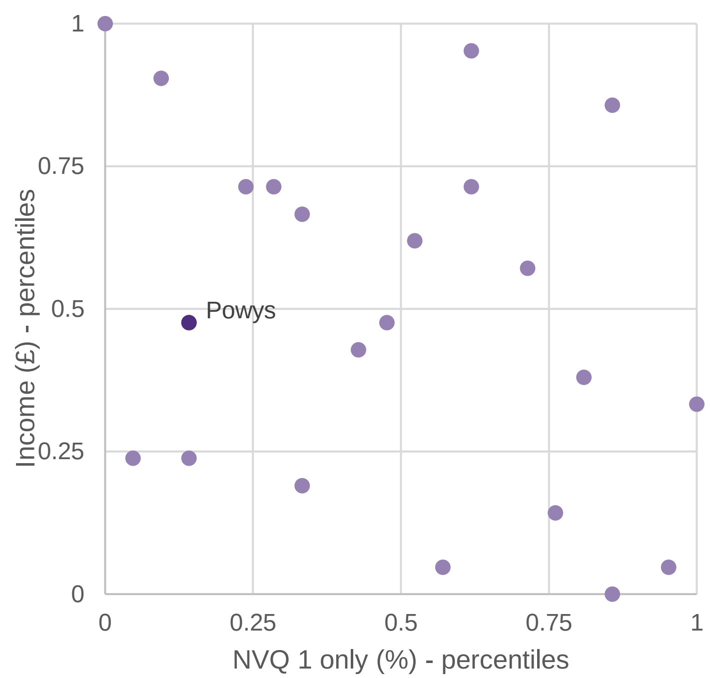
"Those with fewer formal qualifications, are more likely to be employed in the most exposed industries"
Institute of Fiscal Studies, 2018

No qualifications
Powys: 7.4%
Wales: 8.5%
UK: 7.9%



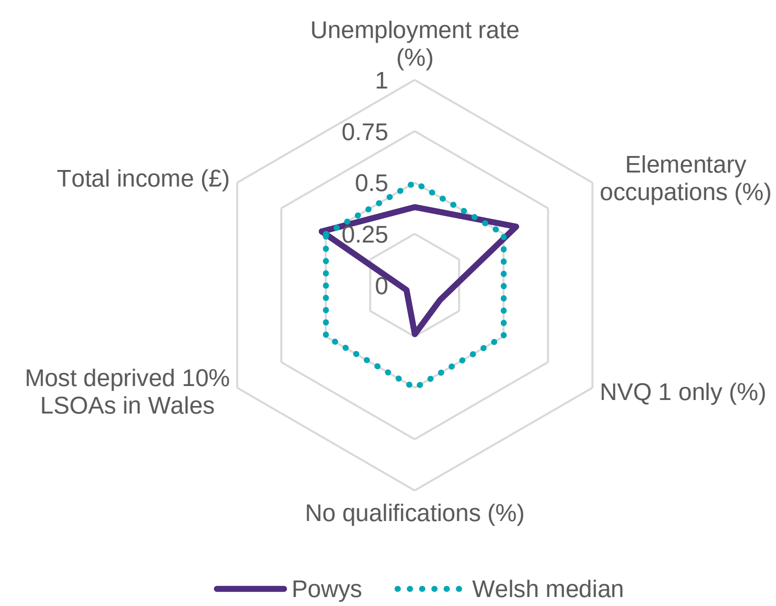
NVQ 1
Powys: 9.2%
Wales: 11.2%
UK: 9.9%

Low skills vs. Income



Community Vulnerability Index Profile

Larger the shape, the higher the vulnerability



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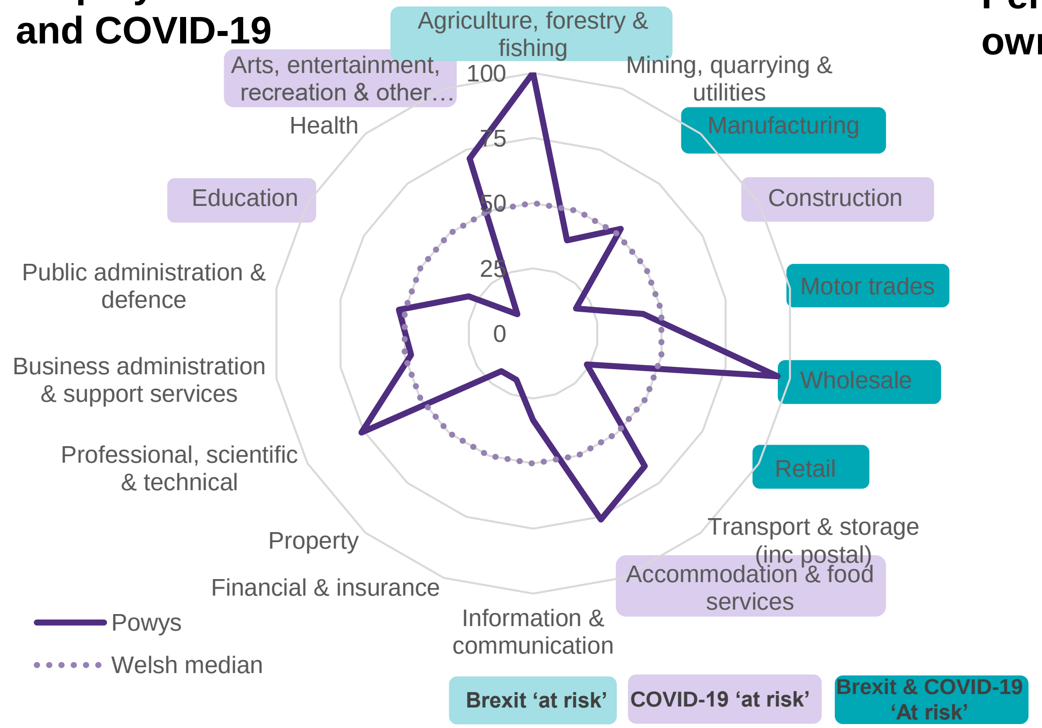
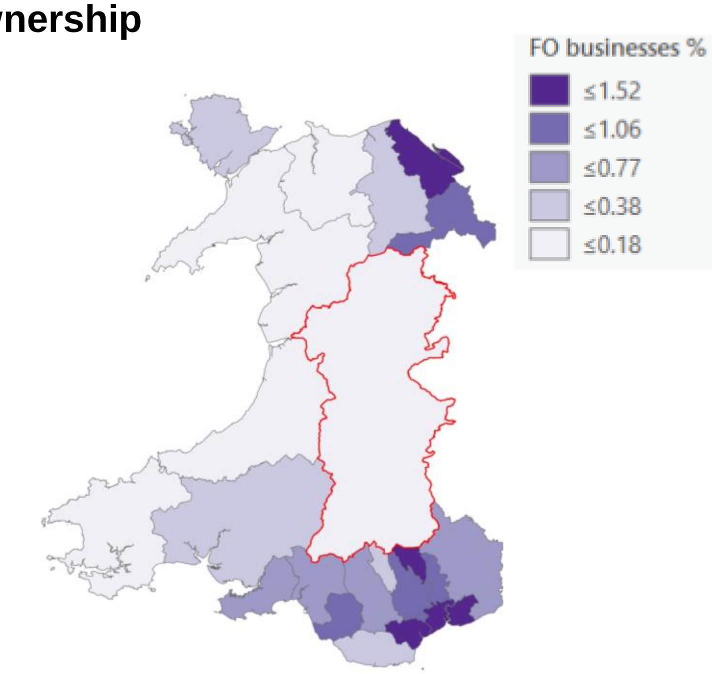
Powys. Economy

Employment sectors – At risk from Brexit and COVID-19



Percentage of all businesses with foreign ownership



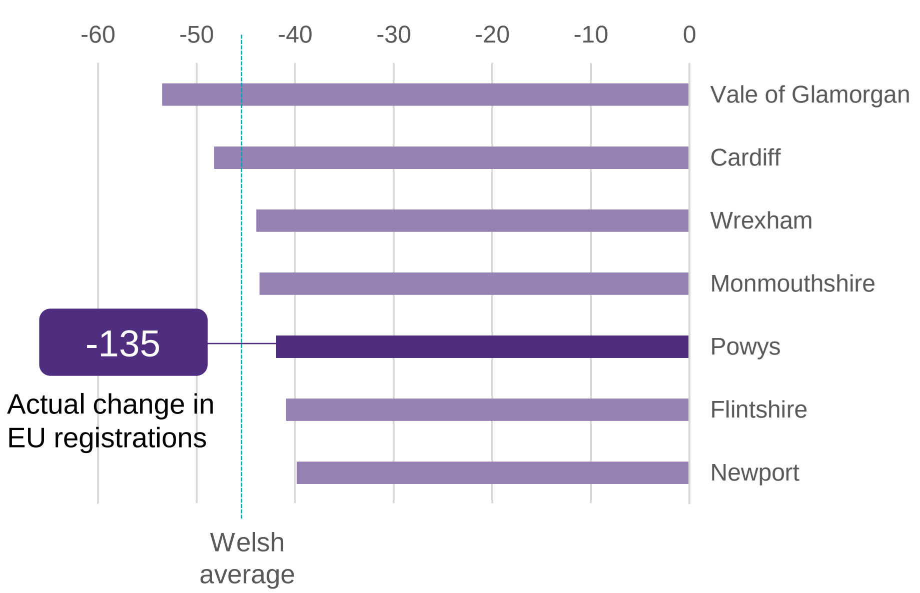
Gross Value Added per job

GVA per filled job
Powys: £35,014
Wales: £46,132
UK: £56,387

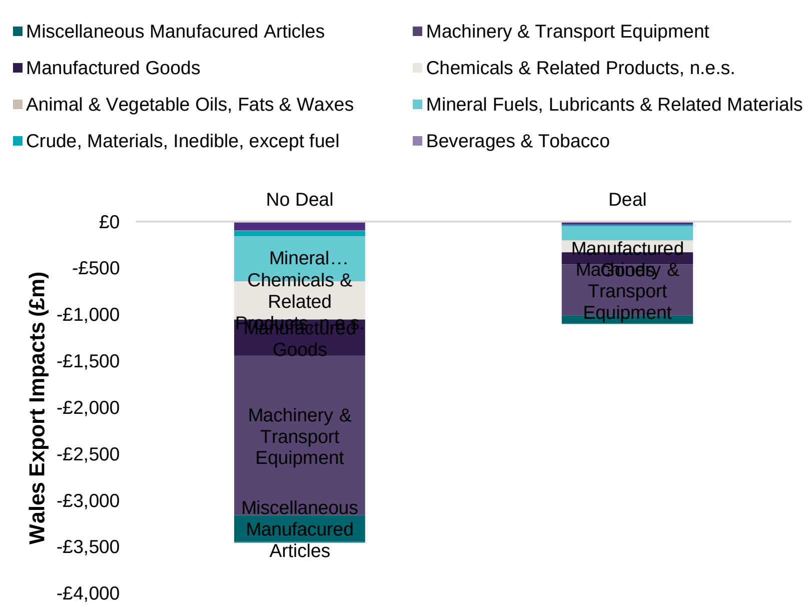
Rank out of 22 Welsh authorities…
22nd

National Insurance Number (NINo) registrations

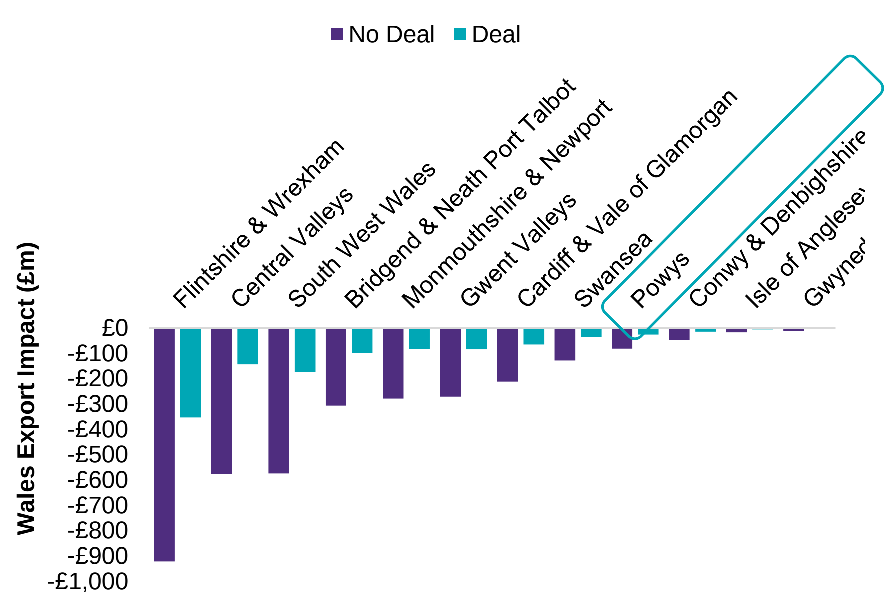
47% reduction in EU registrations between June 2016 and June 2020 across the UK



Export impact value ('No-deal' & 'Deal') by SITC codes, Wales, (Annualised, £m)



Total Export impact value by Welsh NUTS3 Regions (Annualised, £m)



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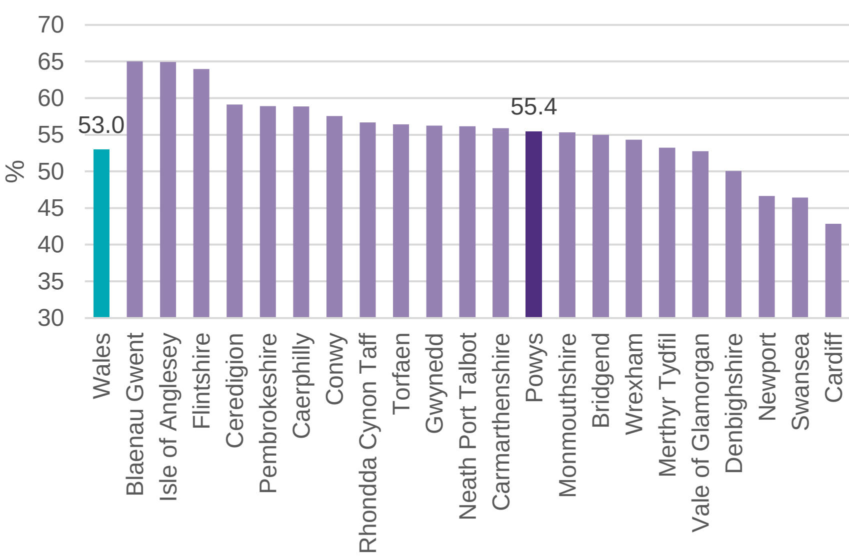
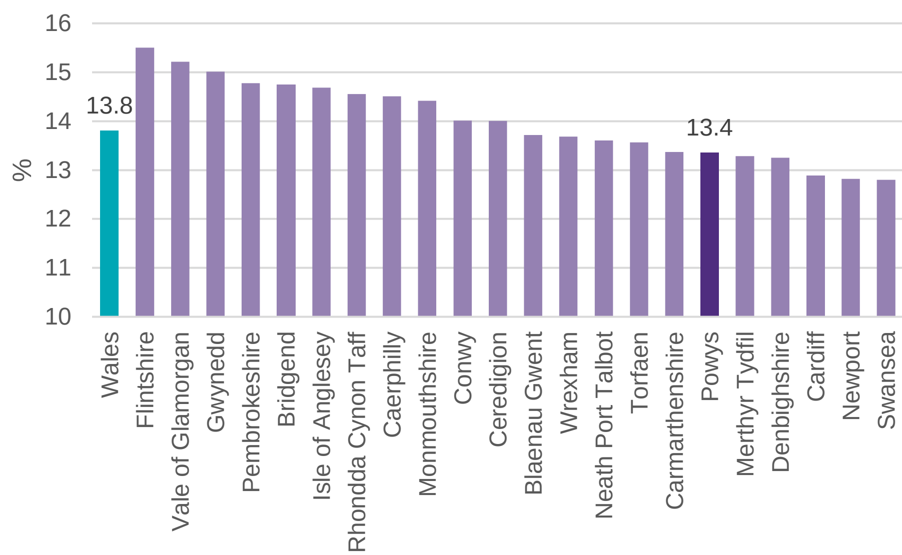
Powys. COVID-19

Percentage of employment in COVID-19 'at risk' sectors



Estimated decline in total annual GVA resulting from COVID-19

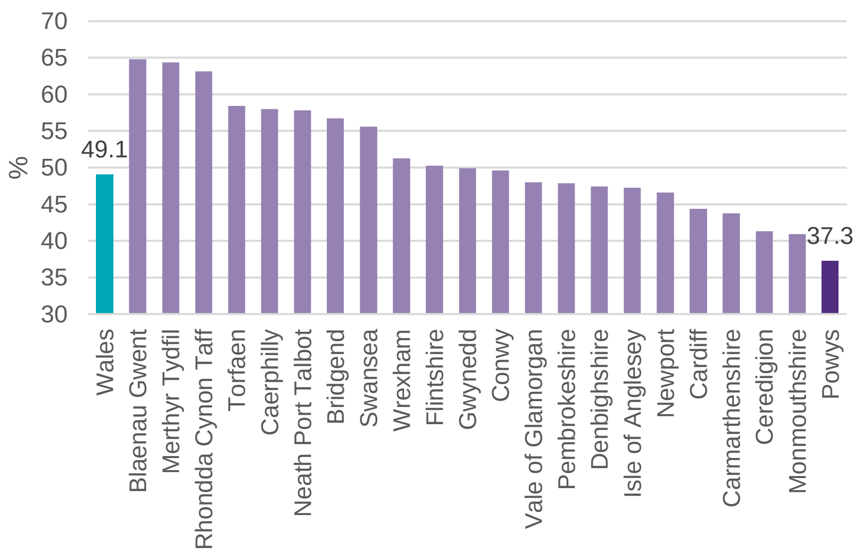


Government support take-up rate

Coronavirus Job Retention Scheme
Powys: 31%
Wales: 31%
UK: 32%

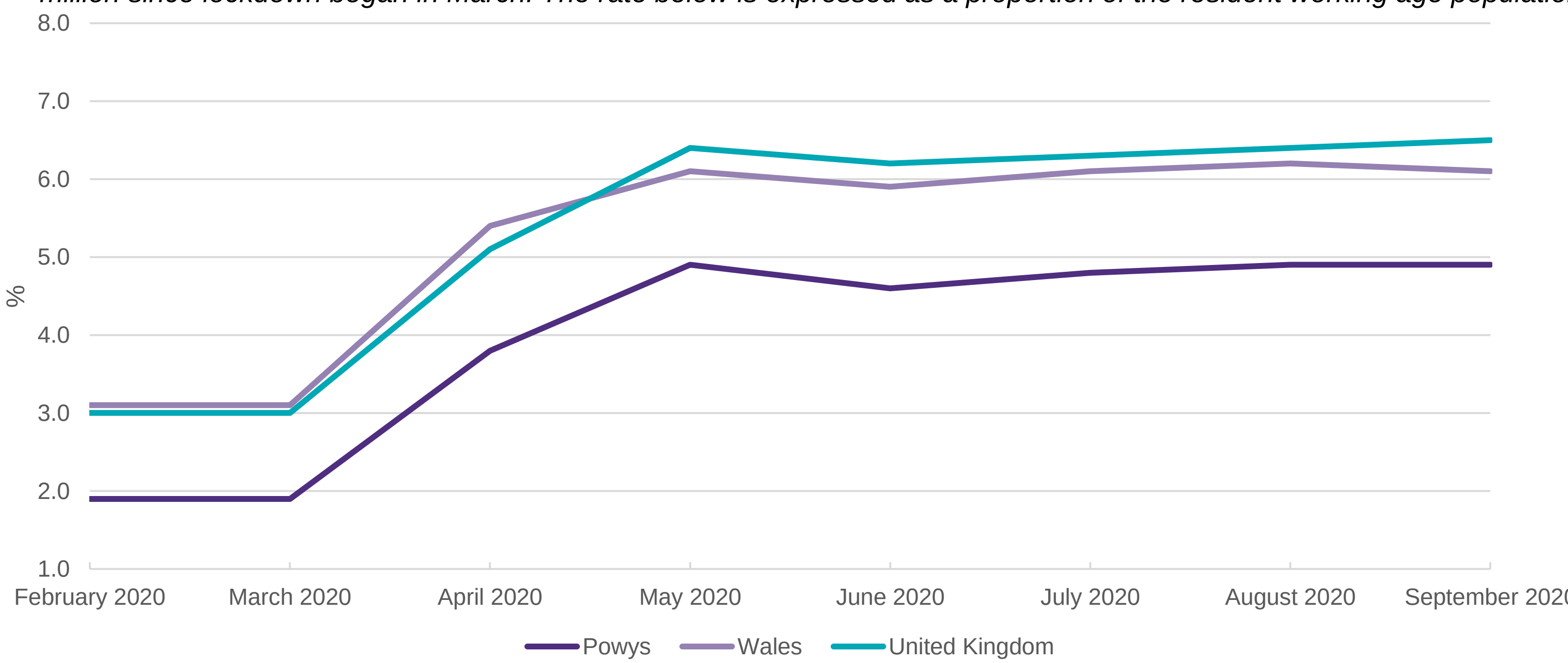
Self-Employment Income Support Scheme
Powys: 77%
Wales: 78%
UK: 77%

Percentage of businesses in COVID-19 'at risk' sectors



Claimant rate (Feb 2020 to Sept 2020)

The number of people claiming unemployment related benefits in the UK reached 2.7 million in September, an increase of 1.5 million since lockdown began in March. The rate below is expressed as a proportion of the resident working age population.



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Powys. Summary

Key findings

- Compared to the other Welsh authorities, Powys has a very low proportion of its population who were born in the EU, at 0.8%, which compares to a Welsh average of 2.6%.
- Powys ranks in the bottom 40% on our Community Vulnerability Index, indicating low levels of social vulnerability to Brexit.
- It has notably low levels of deprivation and a very small proportion of people who are only qualified to NVQ 1, which both contribute to lower vulnerability.
- Powys has had a small decline in EU NINO registrations relative to other East Wales authorities, reducing by 41.9% between 2016 and 2020, which is also lower than the Welsh decline of 45.5%.
- Relative to all other Welsh authorities, Powys has a very high proportion of employment in Agriculture, forestry and fishing, which is an ‘at risk’ Brexit sector, as well as a very high proportion of people employed in Wholesale, which is ‘at risk’ in relation to both Brexit and COVID-19. It is also notable that Powys has a high proportion of employment in both Arts, entertainment and recreation and Accommodation and food services which are both identified as COVID-19 ‘at risk’ sectors.
- Powys has the lowest labour productivity of all Welsh local authorities, with a GVA per job figure of £35,014.
- When employment across all COVID-19 ‘at risk’ sectors is aggregated and benchmarked to all Welsh authorities, Powys has a relatively low proportion, at 55.4%. However, this is still slightly higher than the Welsh average.
- The estimated decline in GVA as a result of COVID-19 is predicted to be 13.4% which is lower than the Welsh average.
- Whilst claimant rate has risen since March this has remained much below the Welsh and UK average.

Key implications

- Given the very high proportion of employment in Agriculture, forestry and fishing in Powys compared to the Welsh median, the council should seek to understand the exposure of local businesses within the local economy. The economic consequences arising from trade fluctuations could impact household and business stability. This, in turn, may lead indirectly to increased pressure on local public services and more challenging prospects for local growth.
- Particular focus should also be given to supporting businesses in those sectors most impacted by COVID-19 (Arts, entertainment and recreation and Accommodation & food services) where the management focus will have been on survival rather than preparations for the EU transition. A key action for businesses should be refreshing their view of all critical suppliers throughout the whole length of the supply chain to ensure business continuity and compliance.
- Although Powys ranks in the bottom 40% of our Community Vulnerability Index, it is still important for the council to continue to support the most vulnerable communities, particularly in light of job losses and income reduction as a result of COVID-19. An important part of this will be identifying where new vulnerable communities might be emerging.
- Given the very low levels of productivity in Powys, the council should identify major growth catalysts that are at-risk because of either the EU transition and/or COVID-19. For example, regeneration and major infrastructure projects that could be delayed or stalled due to uncertainty of funding, demand assumptions or issues in ensuring continuity of supply.

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Data sources

Indicator	Output	Why include?	Source
EU born residents	Bar chart showing proportion of residents that are born in the EU compared to other authorities in the region and the Welsh average.	EU migrants form a crucial part of the economy. In order to understand the potential impacts of changes in migration, it is important to have an overview of what proportion of the current population is made up of EU born residents.	ONS, Population of the UK by country of birth and nationality (Dec 2019)
No qualifications, NVQ 1 only	Factoid showing the proportion of working age residents with no qualifications and the proportion of working age residents qualified to NVQ 1 only.	A study by the Institute of Fiscal Studies found that those with fewer formal qualifications are more likely to be employed in the most exposed industries.	Annual Population Survey (Dec 2019)
Community Vulnerability Index	Thematic map showing overall performance on the 'Community Vulnerability Index' relative to the rest of Wales. Spider chart showing how the area performs on the individual measures, relative to the national median. All figures have been converted into percentiles to display in this way.	Our 'Community Vulnerability Index' takes into account factors which are most likely to impact on a place's ability to adapt in a post-Brexit world, including unemployment, low skills, low level occupations, no qualifications, income and deprivation. NB: Income has been inversed in the spider chart so that a point towards the outer edge of chart indicates lower income levels.	Annual Population Survey (June 2020, Dec 2019); Survey of Personal Incomes (2018); Welsh Index of Multiple Deprivation (2019);
Long-term International migration	Factoid showing net long-term international migration	Changes to the free movement of people could have significant impacts on international migration into areas.	ONS, Local area migration indicators, UK (2019)
National Insurance Number (NINo) registrations	Bar chart showing how the proportion and number of new EU registrations has changed between the referendum and now.	NINo numbers are often used an indicator for the number of migrants moving into a geographical area for work. This is an important consideration given the contribution that EU workers make to the economy.	NINo registrations to adult overseas nationals entering the UK by Region / Local Authority and world region - registrations year to June 2020, DWP (June 2020)
Employment sectors	Spider chart showing employment levels in each of the Broad Industrial Groups (18 sectors in total). Percentage figures are converted to percentiles in order to be display on the spider chart. The performance of a local authority is therefore relative to all other Welsh local authorities, with the 50 line representing the Welsh median. A point towards the outer edge of the chart indicates that the local authority has a high proportion of employment in this sector relative to other Welsh authorities. This helps to highlight sector specialism. Sectors have also been colour coded to show whether they are 'at risk' in relation to either Brexit, COVID-19 or both.	Some employment sectors are more vulnerable to the impacts of Brexit and COVID-19, therefore it is important to understand which sectors are most prominent and whether these are any of these are high risk.	Business Register and Employment Survey (2019)
Foreign Owned businesses	Map showing the proportion of businesses that are foreign owned.	High dependence on foreign owned businesses could pose a risk as there is uncertainty as whether some of these businesses will remain within the UK or relocate.	FAME, Bureau Van Djik (2019)
GVA per filled job	Factoid showing GVA per job compared to the Welsh and UK average along with a rank to show how the local authority performs relative to all other Welsh authorities.	GVA per filled job provides a direct comparison between the level of economic output and the direct labour input of those who produced that output. The level of productivity is useful to consider as it is a current weakness in the UK economy and may be further hindered post-Brexit.	Nominal (smoothed) GVA (B) per filled job (£); Local Authority District (2018)
Trade impacts	Bar charting showing the total Export Annualised Impact in a Deal and No deal scenario by Welsh NUTS 3 Regions (£m), NUTS 3 Regions	It is important to consider the scale and nature of the trade impacts that could results under both a 'Deal' and 'No Deal' scenario. This will vary by region, which is reflective of both the exporting intensity difference between areas as well as the differences in their sectorial composition.	HMRC & Grant Thornton Analysis. Note: The data doesn't include the impact on WA BTTA, WA Energy exports & WA Other

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Data sources (cont.)

Indicator	Output	Why include?	Source
Employment in COVID-19 ‘at risk’ sectors	Bar chart showing percentage of employment in COVID-19 ‘at risk’ sectors compared to the Welsh average.	The sectoral make-up of areas will have a strong influence on the economic impacts of COVID-19. For example areas with a high proportion of the workforce employed in accommodation and food services will be more heavily impacted than area with high levels of professional and technical workers. .	GT calculation based on: Business Register and Employment Survey (2019)
Businesses in COVID-19 ‘at risk’ sectors	Bar chart showing percentage of businesses in COVID-19 ‘at risk’ sectors compared to the Welsh average.	The sectoral make-up of areas will have a strong influence on the economic impacts of COVID-19. For example areas with a high proportion of the workforce employed in accommodation and food services will be more heavily impacted than area with high levels of professional and technical workers.	GT calculation based on: UK Business Counts (2020)
Estimated decline in total annual GVA resulting from COVID-19	Bar chart showing estimated percentage reduction in annual GVA under COVID-19 scenario. The modelled GVA data is based on OBR output losses by sector in 2nd quarter of 2020. A higher figure indicates greater vulnerability.	The level of productivity is useful to consider as it is a current weakness in the UK economy and may be further hindered post-Brexit. The economic productivity of sectors will vary between areas and therefore it is important to consider the knock on impacts of COVID-19 on GVA alongside employment risks.	GT calculation based on: ONS, Regional gross value added (balanced) local authority by NUTS 1 region: UKL Wales (2018) and OBR output losses table
Coronavirus Job Retention Scheme (CJRS) take up rate	Factoid showing take up rate relative to Welsh and UK average.	Certain sectors have been more heavily impacted by COVID-19 than others and as a result a high level of employees have had to be put on furlough. This measure therefore gives an indication of the immediate impacts that COVID-19 is having on local areas.	ONS, Coronavirus Job Retention Scheme (CJRS) Statistics: August 2020
Self-Employment Income Support Scheme (SEISS) take up rate	Factoid showing take up rate relative to Welsh and UK average.	Research has shown that self-employed people are more at risk to the economic impacts of COVID-19. This new dataset gives an early indication of the level of self-employed people in an area who are requiring support.	ONS, Self-Employment Income Support Scheme (SEISS) Statistics: August 2020
Claimant count rate	Line chart showing the change in claimant count rate for the local authority compare to the Welsh and UK average. The rate is expressed as a proportion of the total resident working age population.	Claimant count data is a timely dataset that can be used to see how COVID-19 is impacting unemployment levels in different areas.	Claimant count (Sept 2020)

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