



Evidence of Need

Nelson Town Investment Plan

Report – September 2020

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Study Context



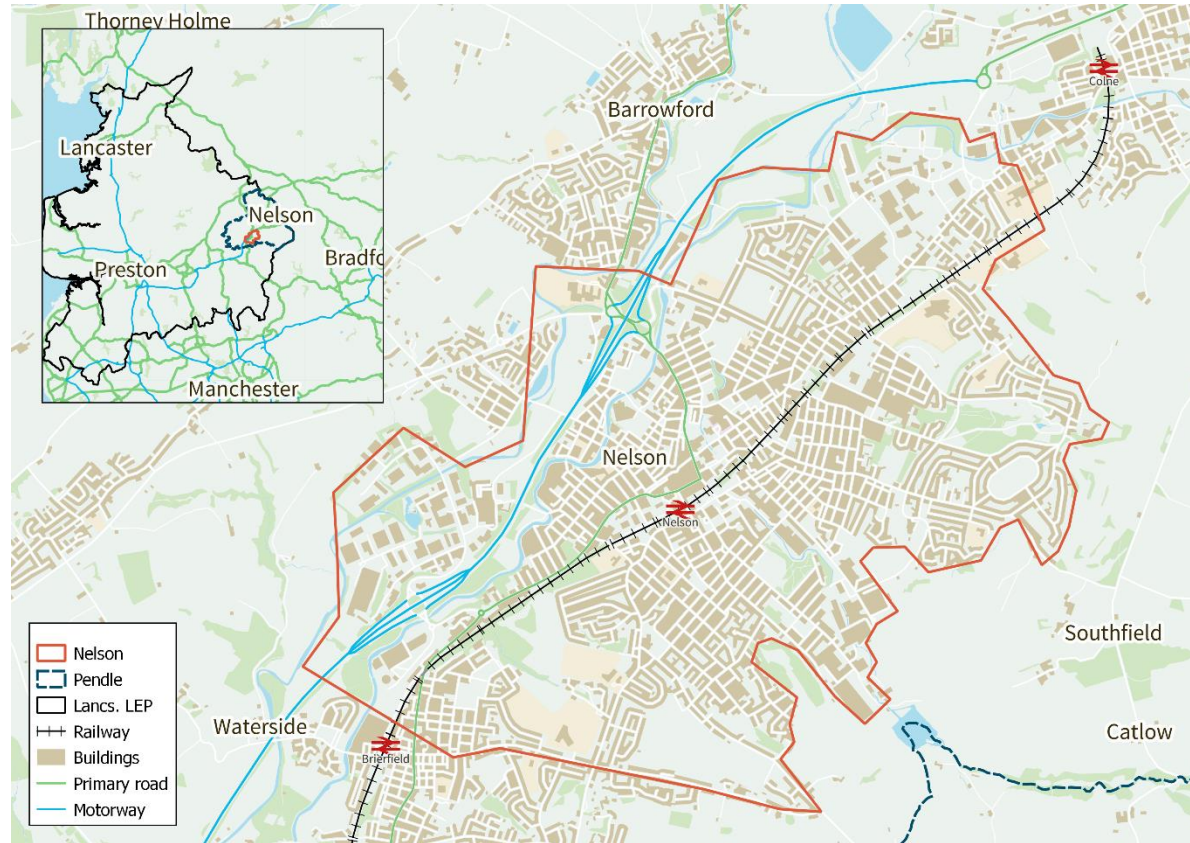
Study Context

Nelson is located within Pendle Local Authority District within Lancashire. The town's heritage is tied to the industrial revolution, during which it emerged as an important centre of textile manufacturing and home to several mills. The cotton industry was predominant in Nelson, large enough to warrant its own union – the Nelson Weavers' Association – with 18,000 members in 1920.

Nelson lies within the M65 corridor between Burnley and Colne, and is closely connected to Blackburn (15 miles), Preston (28 miles) via the M6 and M61. Manchester is 30 miles to the south and Leeds 35 miles to the east. It is connected by:

Road: the M65 motorway connects with Scotland Road (A682) in Nelson, providing access to the national Strategic Road Network

Rail: Nelson Station serves the town and is situated on the East Lancashire Line, and is the last stop before the terminus at Colne. A change is usually necessary to arrive at Manchester or Leeds stations.



Summary Implications – Policy Environment

The Nelson Town Investment Plan is informed by the prevailing policy environment as summarised below:

- Nelson features in the **Greater Lancashire Plan**, and is a major player in driving growth in key sectors such as advanced manufacturing and low carbon technologies. The strengths and challenges presented by Nelson are well understood by the Local Enterprise Partnership and the County Council, and there is support for the realisation of major projects to deliver inclusive growth that will create a cohesive community.
- Nelson features in **Lancashire's Strategic Economic Plan** outlining the need to implement the Burnley to Pendle Growth Corridor and the Colne to Pendle Rail improvements.
- Nelson features in the **the Lancashire Skills and Employment Strategic Framework** outlining the need to improve educational attainment especially in regard to GCSE results.
- Nelson features in **Transport for East Lancashire Masterplan** especially investigating the reinstatement of the Colne to Skipton railway line and the M65 to Yorkshire Corridor Study.
- The policy imperative to facilitate local people to be able to access **better quality jobs in turn increase spend** in the Nelson area is clear within Lancashire County Council and Pendle Borough Council policy priorities.
- There is **Council** support for **prioritising** the projects required to facilitate **economic growth** and maximise opportunities from **large scale projects**, with a series of identified priorities including transport and digital improvements, and support for the delivery of housing and employment sites.

Strategic Context: National

Nelson has a role to play in closing the productivity gap that exists in the UK, therefore the Town Investment Plan needs to demonstrate alignment with National Industrial and Economic Strategies.

UK Industrial Strategy, 2017

The UK Industrial Strategy seeks to create an economy that boosts productivity and earning power throughout the UK, underpinned by five foundations of productivity:

- **Ideas** – the world's most innovative economy
- **People** – good jobs and greater earning power for all
- **Infrastructure** – delivering a major upgrades across the UK
- **Business Environment** – the best place for SME start up and growth
- **Places** – providing prosperous communities across the UK

The Industrial Strategy responds to four identified grand challenges:

- Putting the UK at the forefront of the AI and data revolution
- Maximising the advantages for UK industry in the global shift to clean growth
- Becoming a world leader in shaping the future of mobility
- Harnessing the power of innovation to help meet the needs of an ageing society

Northern Powerhouse Strategy, 2016

The Northern Powerhouse Strategy establishes a vision for *“joining up the North’s great towns, cities and counties, pooling their strengths, and tackling major barriers to productivity to unleash the full economic potential of the North”*.

Relevant priorities include:

- Improving connections between towns and cities in the North
- Improving educational standards and skill levels across the region
- Ensuring the North continues to be an excellent location to undertake R&D, develop innovative ideas and start and grow a business.

Identified strengths of the North include manufacturing, pharmaceuticals, energy and digital sectors.

Identified challenges of the North include lagging productivity compared to the South; poor connectivity limiting the reach of northern cities’ labour markets, wages and productivity; lagging innovation and enterprise; and a lower proportion of highly skilled workers.

Strategic Context: Lancashire

Town Investment Plans need to demonstrate alignment with Lancashire Local Enterprise Partnership Strategies. Lancashire LEP are currently developing the Local Industrial Strategy, due for release later this year. The opportunities and challenges identified in Nelson align directly with those outlined in the Lancashire Strategic Economic Plan and Lancashire LEPs Skills and Employment Strategic Framework 2016.

Lancashire's Strategic Economic Plan (SEP) – Part 2 Growth Deal 2015 – 2021

The overarching purpose of the SEP and Growth Deal is to establish Lancashire as a center of excellence in advanced manufacturing and re-establish the county as an economic powerhouse. LEP key programmes include;

- Sector Development Programme
- Research and Innovation Programme
- Skills for Growth Programme
- Enhanced Business Growth Hub
- Strategic Transport Programme

Key Sectors include Advanced Engineering and Manufacturing for aerospace, automotive and energy clusters and their associated supply chains. Developing sectors include; Health both high-level research and medical product manufacture, aerospace and unmanned aerial vehicles and business process outsourcing. The

SEP identifies that Pendle had the largest concentration of employment in advanced manufacturing in England.

Identified Strengths Lancashire is served by the M65 corridor, has competitive strengths in advanced manufacturing and has two well recognised universities (UCLan and Lancaster University) both continue to work with the LEP. Lancaster University is a specialist in Cyber Security, Big Data and Sector Specific software applications. Lancashire has a strong nuclear sector towards Manchester and Sheffield.

Identified Challenges include a skills shortage among the existing workforce as a barrier to growth of SMEs. There is a large amount of manufacturing in Lancashire, however the majority of the 1800 manufacturing plants in East Lancashire employ less than 50 people and many of these still operate from outdated mill premises which constrain growth.

Identified Opportunities in Pendle / Nelson include;

- Burnley to Pendle Growth Corridor
- Colne to Pendle Rail improvements

Strategic Context: Lancashire

The Lancashire Skills and Employment Strategic Framework 2016-2021

The Strategic Framework makes the skills and employment system more responsive to the needs of Lancashire and create foundations for the priorities of the Lancashire Strategic Economic Plan (SEP) to be implemented. The purpose of the framework is too;

- a) Increase prosperity and economic growth;
- b) Deliver SEP Priorities;
- c) Address issues of unemployment and economic inactivity; and,
- d) Promote social inclusion, social cohesion, and equality and diversity.

Priority Interventions include;

- Improve educational attainment in schools to be above the national average
- Improve advice and guidance to young people across Lancashire, underpin with robust market intelligence
- Develop new and innovative mechanisms including increasing internships and graduate placements across the Lancashire business base
- Address the skills gap in the construction market

Key Issues in the Lancashire Labour Market include an ageing workforce with a modest population growth, areas with a low skills profile, a lower proportion of employment in high skilled jobs than national standards and low educational attainment. Low numbers of 21-34 year olds in the work profile as many who continue to higher education chose not to return to the area. East Lancashire in particular has many challenges in creating new employment opportunities. Pendle is listed as one of four towns where the percentage of young people achieving 5 A* to C grades is below national average.

Outcome Measures tracked annually include;

- Improved school attainment levels in under performing schools across Lancashire.
- Reduction in Lancashire NEET figures.
- More Lancashire residents skilled at Level 3 and above /greater number of apprenticeships at L3 and above.
- A greater number of graduates choosing to work in Lancashire.
- Less reported vacancies / skills shortages in key LEP sectors and areas of high replacement demand and growth.
- Greater number of employers investing in skills.
- A reduction in Lancashire unemployment figures.

Strategic Context: Lancashire

East Lancashire Transport Masterplan

Lancashire County Council worked with Blackburn and Darwen Borough Council to develop a highways and transport masterplan which outlined how the roads, rail and cycle networks could be transformed.

The masterplan set out **detailed work needed to justify investment** in new schemes such as;

- improving rail connections between East Lancashire and the growth areas such as Preston, Central Lancashire, Manchester and Leeds.
- Reducing congestion in the M65 growth area.
- Ensuring that the needs of people who live in remote and rural locations to access work, education and health opportunities are met, making best use of funding likely to be available in future.
- Improving local links in the community so that everyone can get to the services and opportunities that they need, from education and employment to leisure and health.

The Masterplan notes how poorly Pendle is served by rail due to its position at the end of the line and the need to better understand potential through a **rail connectivity study**. A **Burnley/Pendle Growth Corridor Study** is also required to ensure that road infrastructure can support the economic growth planned for Burnley and Pendle.

The Pendle Gateway establishes a series of employment opportunities along the M65 corridor around Junction 12 (new Brierfield Mill mixed use development / expand the existing Lomeshaye Industrial Estate) and Junction 13 (newly developed Riverside Business Park). Lancashire County Council seek to ensure that transport infrastructure projects are able to support these developments.

M65 to Yorkshire Evidence Study (Stage 3 report)

Lancashire County Council has a longstanding proposal to construct a new modern standard single carriageway between M65 terminus in Colne and the Yorkshire Boundary. The study summarises a number of different options for the placement of the carriageway including bringing a bypass to Colne and helping Nelson to be more connected.

Strategic Context: Pendle / Nelson

Pendle Local Plan Core Strategy 2015 – 2030

The Core Strategy sets out the strategic planning policies the Council will use to help guide development in the most sustainable approach and meet the Council key delivery objectives. The key policies of the core strategy, can be aligned with the broad Town Deal themes as follows.

Urban Regeneration – improve Nelson Town Centre into a well-balanced, safe and socially inclusive economy by;

- Improving the **night-time economy** offer
- Protecting Nelson's **primary shopping area** and allocating more **retail priority floorspace** in the town centre
- Create **new office / mixed-use development** in the town centre, but **minimise new land take up**.

The Core Strategy includes **Housing Delivery Targets** - between 2011 and 2030 Pendle will deliver a net development of **5,662 homes (298 dwellings per annum)**, 70% of these homes will be delivered in **Colne and Nelson**.

An **Area Specific Action Plan; Bradley Development Plan Document** sits under the Core Strategy.

Plans include redeveloping Riverside Mills site into a mixed-use scheme, improving access to Walverden Water and selective demolition/ redevelopment of vacant / poor quality homes.

Skills and Enterprise Policy WRK 1 /2 – seek to strengthen and diversify the local economy by improving the range of skills in the workforce especially for those sectors highlighted in the Lancashire SEP. M65 Corridor and Nelson specifically are to become core locations for employment.

Connectivity – the main focus for Transport infrastructure is the £4.5 million Nelson Interchange which opened in 2008.

Strategic Context: Pendle / Nelson

Pendle Local Plan Part 2: Draft Site Allocations and Development

The site allocations plan allocates land for development or designates land for environmental protection. The Town investment Plan must take into account site allocations in the Nelson area.

There are a number of evidence documents that sit under the Local Plan and provide strategic policies on housing delivery within Pendle including;

- The **Strategic Housing Land Availability Assessment (SHLAA)** earmarks Nelson to deliver a minimum of 916 new dwellings by 2030 (24% of the overall growth of the borough).
- The **Strategic Market Housing Assessment (SHMA)** indicates majority (69%) of housing need is within the M65 corridor, compared to 21% in West Craven Towns and 10% in rural Pendle. The SHMA indicates some affordable housing is needed in Colne and Nelson but mostly in Brierfield. **Occupancy Rating Data** included in the SHMA shows that evidence of overcrowding is most evident in Nelson and Colne.

Site allocations in Nelson include;

- Throstle Nest Mill in Nelson to remain as a **Protected Employment Area** proposals for development other than for general industry (B1, B2 or B8) would be resisted.
- Nelson Town Centre to remain as dedicated **retail space**
- Land bound by Bankhouse Road, Fleet Street is to remain as **open space**



Socio-Economic Landscape

Skills & Enterprise

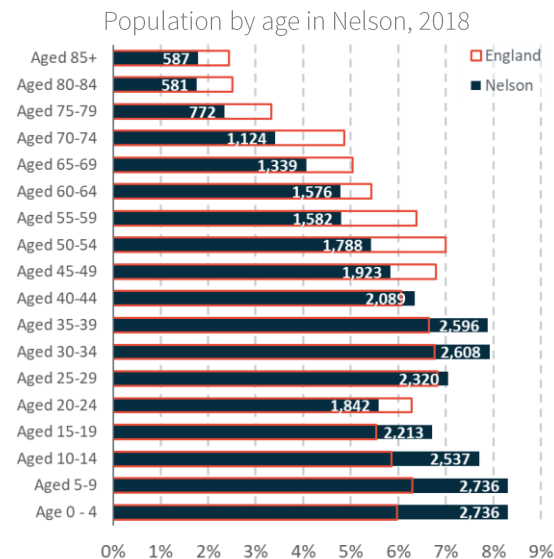
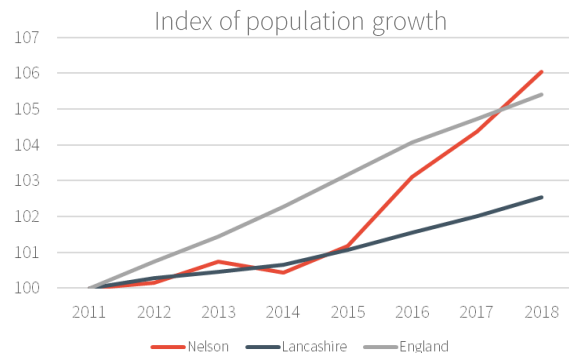


Population – structure

The adjacent charts visualise the age structure and recent growth of Nelson's population, which stands at **32,950** as of 2018.

Nelson's population has grown by approximately 1,880 people since 2011 (+6%), outpacing growth in Lancashire (+2.5%) and England (+5.4%). Population growth in Nelson began in earnest around 2015, following years below the national trend. As such, Nelson's population is experiencing a period of high growth, having grown by over 1,500 since 2015 (+4.8%). Population growth in Nelson since 2011 is being driven largely by those under the age of 15 (11%), and those aged 65 and over (10%). The working-age population (those aged 16-64) grew by a smaller margin of 4% during this period.

It can be seen from the population pyramid that Nelson's population is younger than that of England, with more than 16% of the population under the age of 10 in the town (12% nationally). The average age in Nelson is approximately 35, younger than England (average age 40). Because of its large population of children, Nelson has a slightly smaller proportion of working-aged people (62%) than England (64%). People aged 65 and above are 13% of Nelson's population but 18% of England's. For Nelson, this is an advantageous population structure, as the proportion of elderly dependents is modest given the reasonably sized working-age population. Furthermore, Nelson's large population of young people will ensure a healthy working-age population in the longer term future.

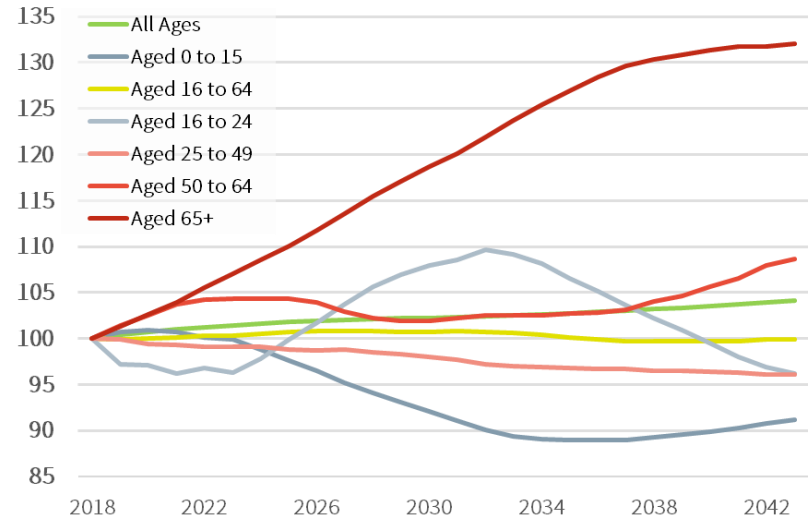


Population - Forecast

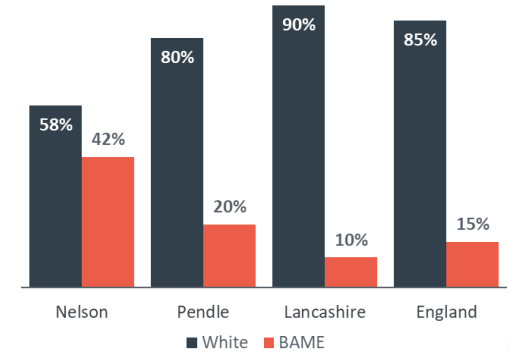
The ONS publishes population projections to the year 2042 at the district level. Pendle's population is forecast to grow 4% between 2018-2042. This growth will be entirely driven by people of retirement age (+32%) and older working aged people (+9%). Correspondingly, the population of children (0 – 15; -9%), young adults (16 – 24; -4%) and younger middle aged people (25 – 49; -4%) will decrease. This is concerning for the Borough, although Nelson itself has a much younger age profile than Pendle, so will be less severely affected by an ageing population at least to 2042.

The most recent data collected at the MSOA-level (i.e. sub-district) on ethnicity was the last Census in 2011, which shows Nelson to have a much more diverse population than both Lancashire and England. In Nelson, BAME people made up 42% of the population in 2011, of whom 96% were Asian or Asian British. This positions Nelson as one of the most diverse areas in England.

Population projection index, Pendle



Ethnicity by area, 2011



Economy - GVA

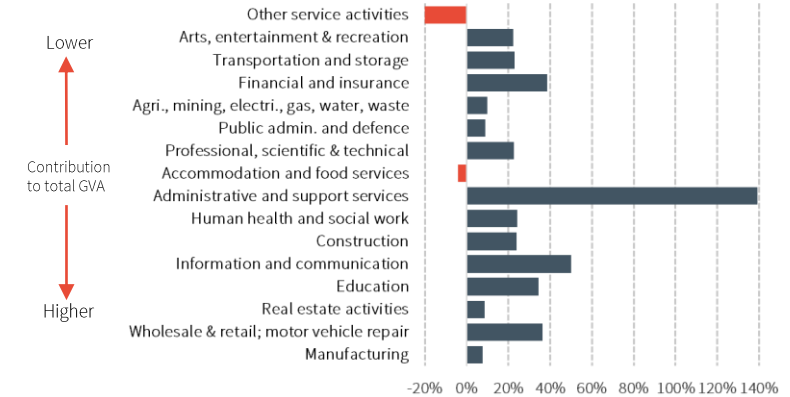
Data on the size and sectoral composition of the economy, as measured by Gross Value Added, is released by the ONS at the district-level.

Pendle, Nelson's local authority district, has a manufacturing-based economy, with this important sector accounting for over half (55%) of Pendle's economic output and worth approximately £1.26 billion. No other sector in Pendle contributes more than 10% of the district's total GVA. The next largest sector is Wholesale & retail; motor vehicle repair, which accounts for 9% of Pendle's economy and is worth £202 million, followed by Real Estate, Education, Information & Communication and Construction.

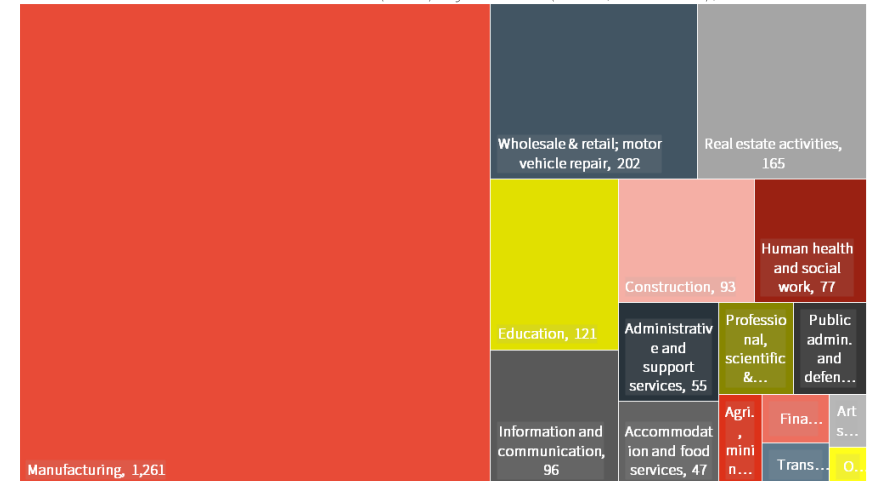
Within manufacturing, the manufacture of metals, electrical products and machinery is the largest subsector (which accounts for $\frac{3}{4}$ of the wider sector).

Most sectors of Pendle's economy have been growing since 2013, with total growth in the economy of 15% during this time, although England grew 21% over the same period. Of Pendle's larger sectors, Information & Communication has shown the strongest growth (+50%).

Change in Gross Value Added (GVA) by Sector during 2013-18, Pendle



Gross Value Added (GVA) by Sector (2018; £million), Pendle



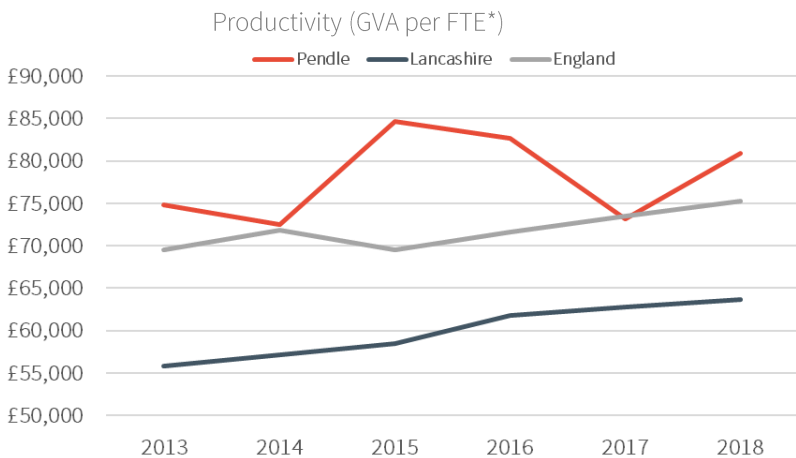
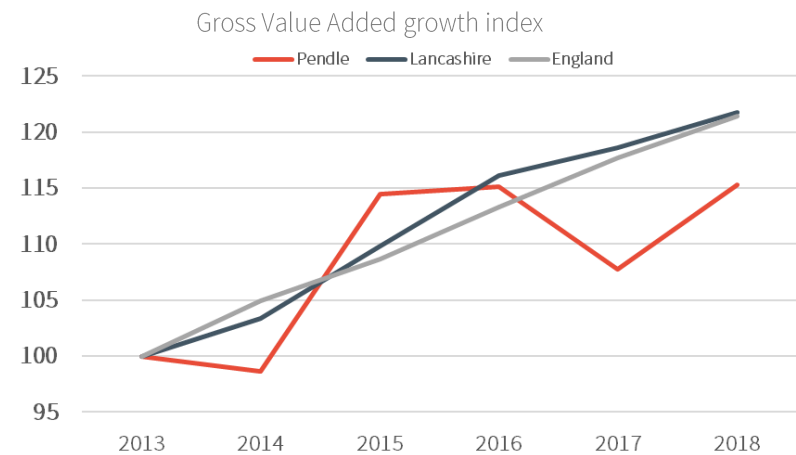
Economy - GVA

The index chart (top) shows economic growth in Pendle, Lancashire, and England indexed to the year 2013. It can be seen that growth in Pendle has not matched Lancashire and England, lagging each comparator area by over 10%. Greater fluctuation in growth at smaller geographies is common, although Pendle has experienced a degree of volatility in GVA, with rapid growth between 2014-15 followed by a decline during 2016-17.

Productivity is the rate of economic output per input. Productivity can be measured using GVA (output) per FTE (input)*. Change in productivity over time is shown on the bottom chart, where it can be seen that Pendle enjoys good levels of productivity relative to England and especially Lancashire.

Pendle's impressive productivity is driven by the manufacturing sector, which accounts for 55% of the district's output with only 39% of its input. The manufacture of air and spacecraft craft and related machinery (SIC 30300) is the joint largest employer (1,500 employed) of any subsector in Pendle, with Rolls Royce operations in Barnoldswick. The manufacture of furniture (SIC 31090) is the joint second largest subsector by number of employees (1,250) in the borough, owing to the large operations of Buoyant Upholstery in Nelson.

As of August 2019, redundancies are planned at Rolls Royce in Barnoldswick, following the collapse in demand for air-travel – a major threat to the borough's overall productivity.



Data source: Regional gross value added (balanced) by industry, ONS
*Gross value added per Full Time Equivalent job – economic output divided by the number of jobs adjusted for part-time employment

Employment – sector mix

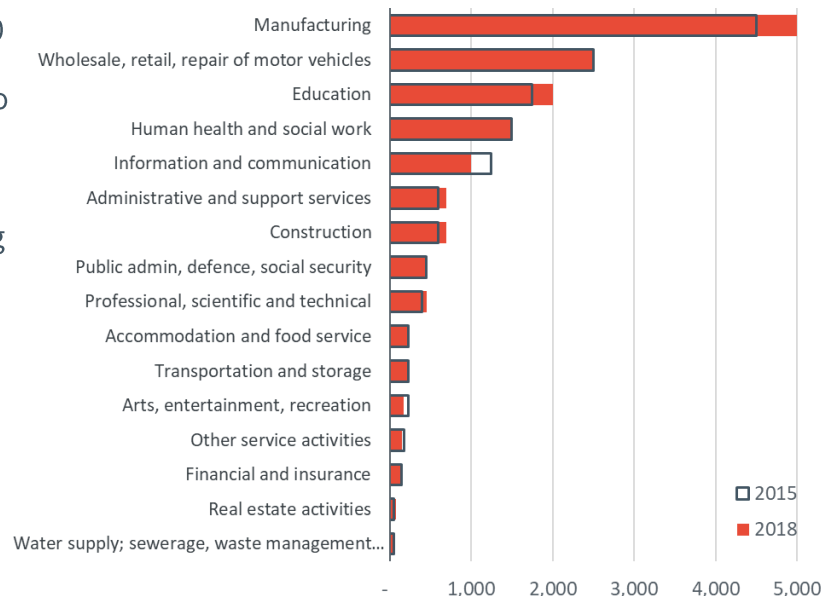
In Nelson approximately 15,000 people are employed, with strong growth of 1,000 (+7%) between 2015-18. This is comfortably above the national average over the same period (3.7%) and Lancashire (2.4%) and indicates Nelson (prior to COVID) experienced a period of strong growth.

Manufacturing employs a third of all employees in Nelson, accounting for 5,000 people in 2018 and growth of 11% since 2015. Coupled with the substantial business base of manufacturing firms in Nelson the importance of this sector to the town's economic vitality becomes even clearer with the growth in employees suggesting a positive picture of high demand and opportunity. It should be noted, however, that such data precedes the pandemic, and that distancing requirements in the workplace have acutely affected manufacturing activity.

Furthermore, following declining air-travel, knock-on effects of the reduced Rolls Royce operations in nearby Barnoldswick will affect suppliers in Nelson. Advanced Manufacturing is one of the top priority sectors for the Lancashire LEP, so given its strategic importance and firm presence in Nelson – but also its vulnerability, it is vital that the town's manufacturing base is supported.

Other prominent sectors registering employment growth in Nelson include Education (+14%) and Construction and Administrative and Support Services (both +17%). In contrast, Information and Communication has seen the number of employees in Nelson reduce by 20% in the relatively short period of 2015-18.

Employment by Sector (2018 and 2015), Nelson



Employment – Nelson as a local hub

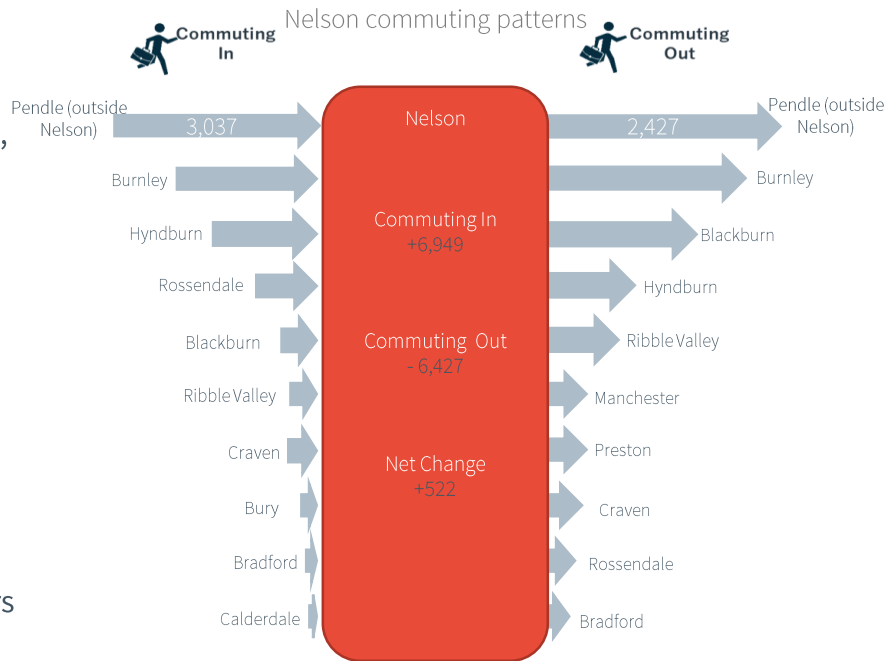
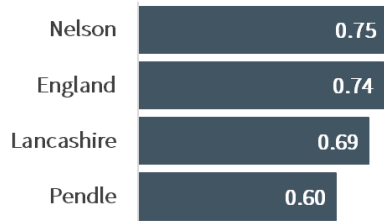
Jobs density gives a comparable indication of economic activity across areas. It is the ratio between the working-aged population and total number of jobs; a high jobs density indicates high levels of economic activity given the size of the local labour market.

Nelson has a higher jobs density than both the wider Pendle borough and Lancashire, as well as England. This is encouraging, although it is not unusual for towns – which serve as local commercial centres – to have a jobs density above 1 (i.e. more jobs than working-aged residents). As such, there is potential for Nelson to increase its role as Pendle’s main hub for employment. 16% of Nelson’s employment is in the public sector, similar to England, so Nelson has a decent sized private sector to drive growth.

Nelson also benefits from a small net-inflow of commuters, as per the last Census (2011). Approximately 500 more people commute to Nelson for work than commute from Nelson for work; further underpinning the town’s role as an employment centre.

Unsurprisingly, large quantities of workers commute between Nelson and the rest of Pendle for work. In terms of in-commuters, Bradford is the only city in the top 10 origin locations for commuters to Nelson; whilst Manchester, Preston and Bradford are all in the top 10 destinations for commuters from Nelson. As such, Nelson experiences some loss of workers to larger nearby cities, and should consider how talented workers can be tempted to remain in the town.

Jobs density, 2018



Employment - Forecasts

Employment forecasts are provided in the Lancashire Labour Market Intelligence Toolkit, from Oxford Economics. For the area of Burnley and Pendle, of which Nelson is a part, employment is forecast to grow 1% between 2018-28 – lower than the forecast for Lancashire (+2.6%) and England (+5.2%).

Burnley and Pendle's modest employment growth will be driven by:

- Administrative and Support Services
- Wholesale and Retail Trade
- Construction
- Professional, Scientific and Technical Activities
- Information and Communication

These sectors align with three of the Lancashire LEP priority sectors - Financial and Professional Services; Construction; Creative and Digital and are thus ideal targets for LEP-level support.

Replacement demand, i.e. demand needed to offset the retirement or migration of workers, will be greatest in the Wholesale & Retail and Manufacturing sectors. With manufacturing in Lancashire both of high strategic importance and vulnerable due to the effect of Covid19 on the demand for aerospace equipment, the need to support this sector is further underpinned by the projection of 1,220 workers needed per annum. Since 2015, part-time employment has grown 14% in Nelson, compared to 9% for full-time employment. Ideally, to meet replacement demand, job creation should be geared towards full time and permanent employment.

Top 5 Sectors requiring employees due to sector growth (expansion demand), 2018-28 – Burnley & Pendle

Sector	Change in total jobs per year
Administrative and Support Services	+50
Wholesale and Retail Trade	+40
Construction	+40
Professional, Scientific and Technical Activities	+30
Information and Communication	+20

Top 5 Sectors requiring employees to fill jobs to replace people leaving or changing jobs (replacement demand), 2018-28 – Burnley & Pendle

Sector	Replacement jobs required per year
Wholesale and Retail Trade	1,390
Manufacturing	1,220
Health and Social Work	860
Administrative and Support Services	710
Accommodation and Food	690

HATCH

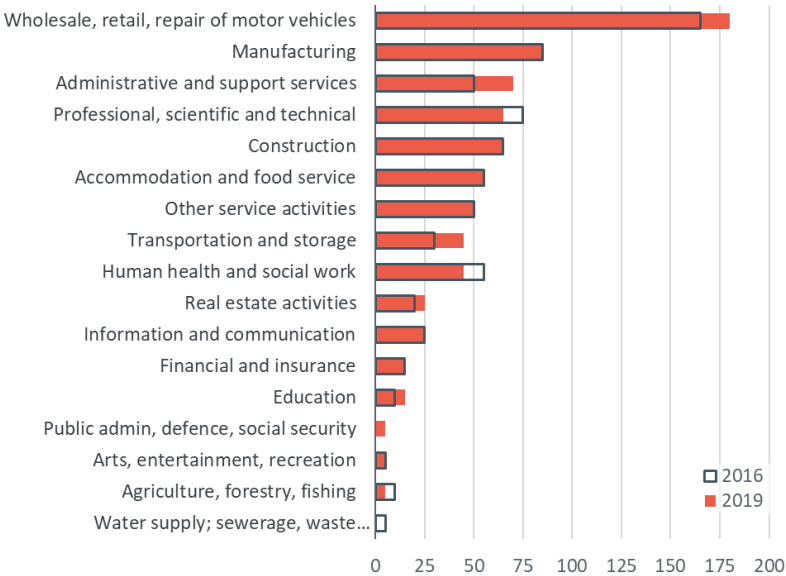
Business

Nelson has a base of around 755 businesses, which has grown approximately 5% between 2016 and 2019 – shy of the 6.6% national average over the same period and about the same as Lancashire (5.2%).

Business base analysis by ONS broad sectors identifies Nelson’s largest sector by some margin is Wholesale and retail trade; repair of motor vehicles, which accounts for over 175 of Nelson’s businesses (almost ¼) and has grown well over the past three years (9%).

Other growing sectors include Transportation and Storage (+50%) and Administrative and Support Services (+40%). These sectors both enjoy a level of specialisation relative to England, with location quotients of 1.4 and 1.1 respectively (a location quotient above 1 indicates specialisation – see the following slide for all sectors). This indicates that these sectors are key drivers of business growth in Nelson.

Business counts by Sector (2019 and 2016), Nelson



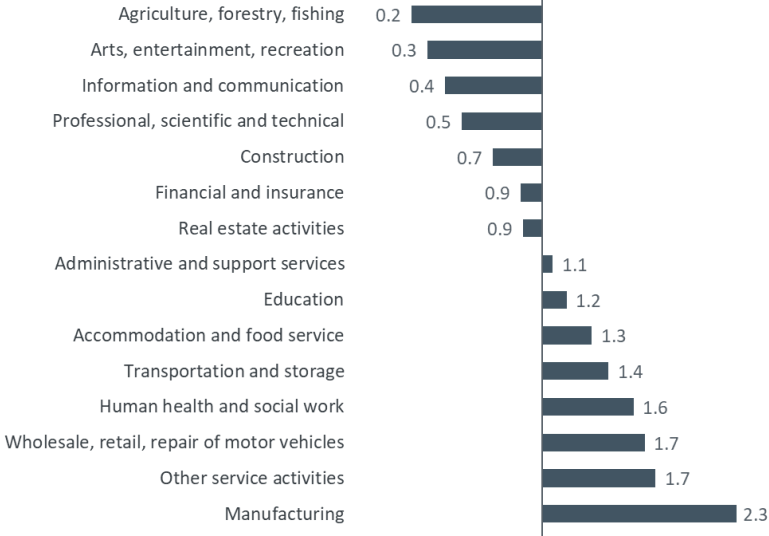
Business

Nelson’s most specialised sector in terms of business base is Manufacturing, with this sector also being the second largest by total number of businesses. This sector did not experience any change in the number of businesses between 2016-19. With great potential for high value economic activity, and an already established presence in Nelson, manufacturing businesses and start-ups is a target opportunity sector for Nelson.

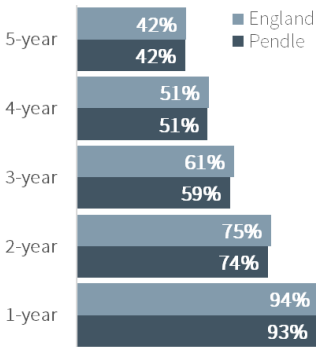
The ONS publishes data on business demography at the district level, tracking the births, deaths and survival rate of businesses. Compared to England, Pendle has a modest net business birth rate (births minus deaths adjusted for population size) compared to England; in the borough 5.4 businesses were ‘born’ and 4.9 ‘died’ per 10,000 working-aged people in 2018, compared with 9.7 and 8.5 nationally. In both England and Pendle, the net birth rate of businesses has declined by over 50% since 2015, reflecting macroeconomic uncertainty.

Despite a lower birth rate, Pendle displays robust business survival, matching England for 5 and 4 year survival rates, and falling 1-2% short of England for 3 years and below.

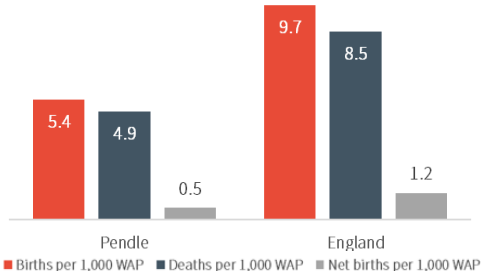
Business Sector Specialisation, 2019



Business survival rate, 2018



Business births and deaths, 2018



Data source: UK Business Counts, 2019 – ONS
Note: specialisation is measured using a Location Quotient (sector share for Nelson divided by the sector share for England)

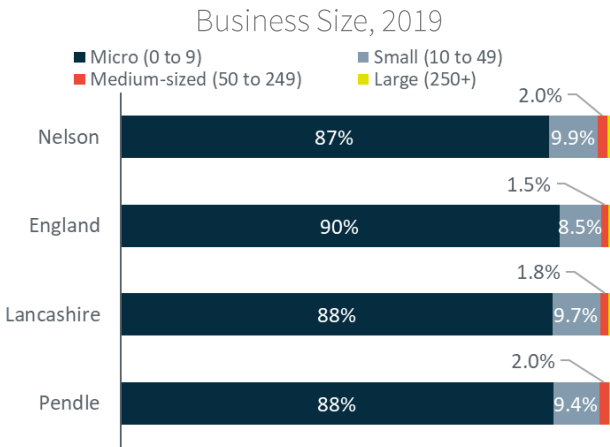
Business

Relative to England, Nelson contains fewer micro-sized businesses as a proportion of the business base. Comparatively, it has a higher percentage of small and medium sized businesses than comparator areas including wider Lancashire and England. Large businesses, i.e. those employing 250+ people , make up a small proportion (0.7%) of businesses in Nelson, although more so than comparator areas (all 0.4%). This suggests that Nelson may be a more difficult location than elsewhere in England to start-up and run a micro business.

A handful of large companies are headquartered in Nelson, including the telecommunications firm Daisy Group, which employs over 1,000 people and IT company Allvotec. The main manufacturing sites of both Protec Fire Detection and Buoyant Upholstery, who employ over 500 people each, are in Nelson. These major companies are important investors within the town and it is vital that their needs are understood and barriers to growth are addressed.

Lomeshaye Industrial Estate – home to a number of the town’s largest employers – is a Strategic Employment Site within the adopted Core Strategy (Policy WRK3). It lies adjacent to junction 12 of the M65; approximately 1 km from the Town Centre. Design principles for a large extension to the north west of the existing estate are currently being developed. Other sites of strategic importance include: Southfield Street/Valley Mills (Local Plan Policy 22; immediately south of the town centre); Throstle Nest Mill (Local Plan Policy 22; located east of the hospital); Hallam Road (Local Plan Policy 22); Riverside Business Park (located off junction 13 of the M65); Whitefield Mill/Business Centre (located on Victoria/Maurice Street). Many of these employment sites are accessible within a 15-minute walk of the town centre.

Data source: UK Business Counts, 2019 – ONS; Gov.uk Gender Pay Gap Service, 2019



Largest employers in Nelson, 2019

Name	Number of employees
Barnfield Construction	120
Pendle Borough Council	>250
Daisy Corporate Services Trading	250 to 499
Daisy It Managed Services	250 to 499
Seafood Pub Company Holdings	250 to 499
Farmhouse Biscuits	250 to 499
Sovereign Group	250 to 499
Buoyant Upholstery Limited	500 to 999
Nelson & Colne College	500 to 999
Protec Fire Detection	500 to 999
Allvotec Limited	1000 to 4999
Daisy Communications Ltd.	1000 to 4999

Economic Activity

Data on unemployment and economic activity rates for small areas (sub-district) are not released frequently by the ONS, with the last Census (2011) being the most recent reliable data on these indicators for Nelson. At that time, Nelson performed below par than comparators areas England and Lancashire both for the unemployment rate and economic activity rate.

More recent unemployment and economic activity data is available at the district level, where the most recent data is for March 2020. At this point, the data shows a relatively buoyant labour market – as the effects of the pandemic, especially on employment, had not yet fully materialised. In March 2020, Pendle had slightly lower levels of economic activity and higher levels of unemployment than Lancashire and England, although economic activity in Pendle has grown 4.9% since March 2015, outpacing 1.8% growth at the national level.

Pendle contains a high proportion of people who are self-employed, at almost 14% as of March 2020 – a greater proportion than Lancashire and England. Furthermore, in Pendle, this proportion has grown almost 5% since 2015; a much higher rate of growth than the national average (+0.8%). This likely reflects the growth of the ‘gig’ economy – i.e. where workers are considered independent contractors of companies such as Uber and Deliveroo.

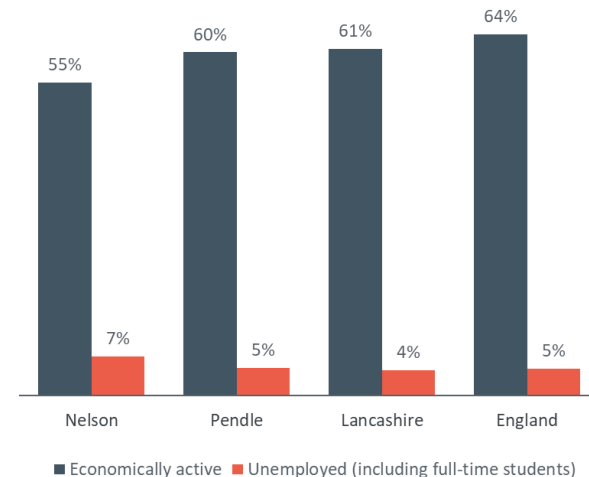
Self-employed people have been acutely exposed to the economic ramifications of the pandemic, as they do not enjoy the same rights as employed workers. As such, a larger proportion of Pendle’s workforce faces greater risk in this regard than England. The recent impact of Covid-19 on employment is explored via up-to-date claimant count data on the next slide.

Data source: Business Register and Employment Survey, 2018; Census, 2011 - ONS

Economic Activity and Unemployment, 2020

Area	Economic activity, March 2020 / change since 2015		Unemployment, March 2020 (change since 2015)		Self-employment, March 2020 (change since 2015)	
Pendle	77%	+4.9%	4.1%	-2.0%	13.9%	+4.8%
Lancashire	79%	+5.0%	3.1%	-2.2%	10.4%	+1.1%
England	79%	+1.8%	3.9%	-2.0%	11.1%	+0.8%

Economic Activity and Unemployment, 2011



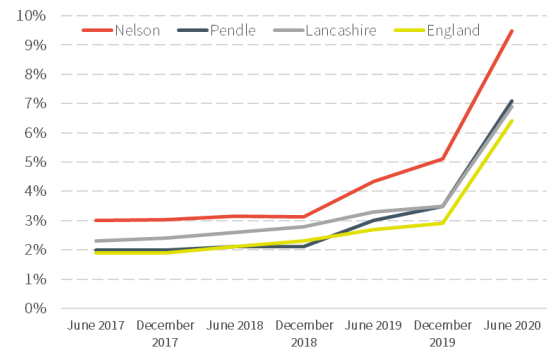
Labour Market Participation

Nelson has trended above the national average for proportion of people claiming benefits who are required to look for work by the DWP consistently over time. Like all areas of the country, this proportion has risen sharply in 2020 following the onset of the COVID19 pandemic in March 2020. Currently, at least 9.5% of Nelson's working-aged population are claiming government benefits (and are required to be seeking work); this is higher than each comparator area by at least 2 percentage points, a gap that has been consistent for the past 12 months.

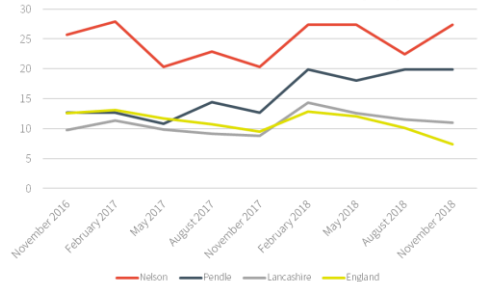
Data on Jobseekers Allowance is being phased out in favour of the newer universal credit claimant counts. However, data on JSA claimants to 2018 provide useful insight on rates of people trying to enter the labour market (i.e. potentially economically active). The data can be separated out by age. When looking at both younger claimants (those aged 24 and under), as well as all ages, Nelson has a higher rate of JSA claimants in the working-aged population than the comparator areas of Pendle borough, Lancashire and England.

Whilst Nelson's rate of JSA claimants has consistently been above comparators, the gap started to widen in the final quarter of 2017. By the last quarter of 2018, Nelson had well over twice the rate of JSA claimants than Lancashire and England. When looking at only those claimants aged 24 or below, Nelson's rate remains above comparators, although the gap is narrower, and has not widened over time, but rather fluctuated over successive years.

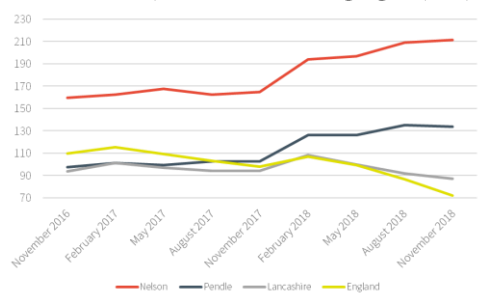
Claimant count as a proportion of the working age population



Youth** JSA claimants per 10,000 working-aged people



JSA* claimants per 10,000 working-aged people



Data source: Claimant count, 2020 – ONS; Department for Work and Pensions, 2018.
*Job Seekers Allowance; **Aged 16-24

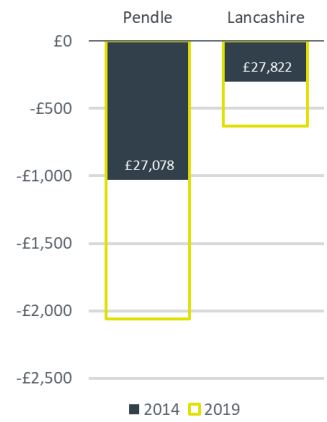
Earnings and Income

The annual income of the average Nelson household is £30,600 - approximately £13,000 less than the national average (-30%) and £7,000 (-19%) less than Lancashire. However, the cost of living is significantly lower in Nelson, as evidenced by its low affordability ratio of 2.9 (indicating that the cost of property is approximately three times greater than annual earnings); the equivalent ratio at the England level is 8.1. As such, after housing costs, the average household income in Nelson is £18,400 – with a £6,280 gap (-25%) with Lancashire and £9,705 (-35%) with England.

Within Pendle, there is a large gap between workplace and resident earnings – i.e. the income of people who work in Pendle (but may live elsewhere) vs people who live in Pendle (but may work elsewhere). It can be seen that workplace income in Pendle was over £2,000 less than resident income in 2019 – an exact doubling since 2014. A similar gap exists in Lancashire but is much smaller in scale, with workplace incomes being approximately £630 less than resident incomes in 2019. This suggests that earning opportunities for residents of Pendle are better outside of the borough. By extension, for Nelson, residents will likely be able to earn a better income outside of the town and borough, and probably by a large and growing margin. This illustrates an acute need to improve earning potential in the local area to improve competitiveness with surrounding areas.



Difference between workplace and resident income by year (axis) with 2019 resident annual income (bar label)

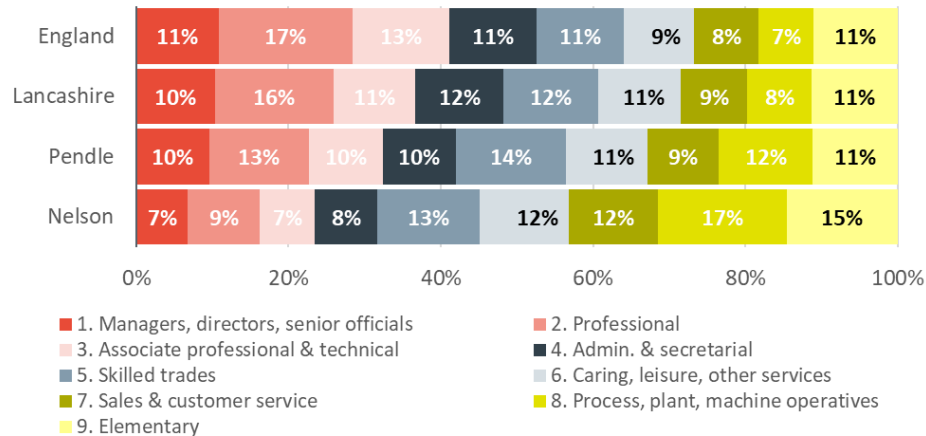


Occupations and Skills

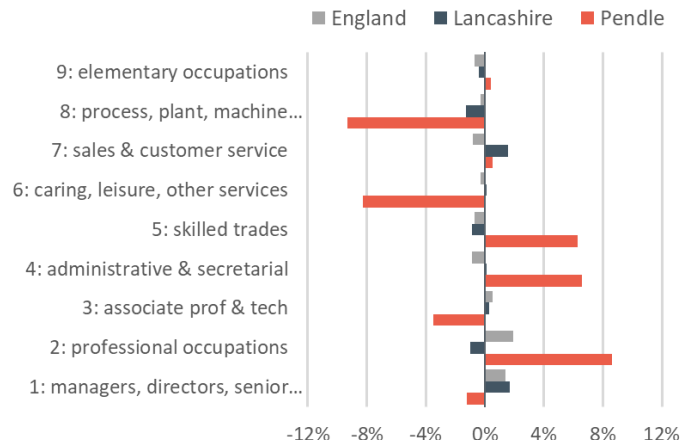
The latest reliable data for Nelson on occupations is the 2011 Census, as more recent data does not cover smaller areas. The Census shows employment in Nelson to be geared towards elementary occupations at the lower end of the ONS' Standard Occupational Classification scale (which categorises jobs/roles based on skill requirement or degree of specialisation), with Process, Plant and Machine Operative occupations the most numerous in Nelson whereas Professional Occupations are the largest in Lancashire and England. The three higher-level occupations make up 23% of all jobs in Nelson, markedly less than Pendle (32%), Lancashire (37%) and England (41%).

Looking at the 5-year trend shown in the more recent APS data, which does not cover the sub-district level, it can be seen that Pendle has experienced a substantial shift away from Process, Plant and Machine, as well as Caring and Leisure occupations towards Skilled Trades, Administrative and Secretarial, and Professional Occupations. This shift towards more skill-intensive work is encouraging and indicates a shift in the right direction for Nelson, which will be a driver of Pendle's trend.

Occupations (SOC), 2011



Change in proportion of jobs by occupation (SOC), 2015-20



Education

The latest data for Nelson on qualifications is the 2011 Census, which shows Nelson to have a significantly larger proportion of adults with no qualifications than comparator areas. It also had a substantially smaller proportion of people with degree level (NVQ4+) qualifications than Lancashire and England. Lower and intermediate-level qualifications (NVQ1-3) were more similar to comparator areas. As such, Nelson could significantly benefit from an improved skills profile.

The more recent APS data on qualifications, which only covers Pendle, shows a large decrease in the proportion of people with no qualifications in Pendle (-8.1 percentage points) since the Census as well as a moderate decrease in the proportion with apprenticeships (-3.1 pp). Conversely, the proportion with NVQ3 (2.3pp) and NVQ4+ (+8.2 pp) have grown, demonstrating an encouraging trend for Nelson.

Recent data on school attainment in Nelson is also positive, with the percentage of pupils achieving grade 9 – 4 passes in English and Maths close to the national average, and the average Progress 8 score in Nelson’s secondary schools positive. A-level results from Nelson’s sole sixth form college are more divergent from the national average, with a smaller proportion of students achieving A-levels of at least AAB, although 63% of Nelson and Colne College students progress to higher education, compared to 58% nationally.

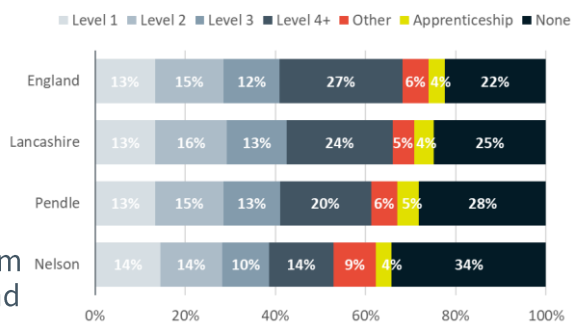
Out of Nelson’s 11 primary schools, eight are rated ‘Good’ by Ofsted, with one each ‘Requires improvement’ and ‘Outstanding’, with another school unrated. Of Nelson’s 4 secondary schools, two are unrated, one ‘Requires improvement’ and one is ‘Good’. Whilst Nelson and Colne sixth form college is currently unrated by Ofsted, it is reputed as one of the best sixth-form colleges in England for its quality of teaching. As such, given the town and wider borough’s comparatively low skills profile compared with England, the college is of high strategic importance to the local labour market.

Data source: Census, 2011 (ONS); Department for Education, 2019

Educational attainment, KS4 (GCSE) and KS5 (A-level), 2018

Indicator	Nelson average	National average
Avg. Attainment 8 score	41.20	46.7
Adjusted Progress 8 measure	0.25	0
% achieving 9-4 passes in GCSE English & Maths (2018)	62%	64%
% achieving A-levels of AAB or better, with at least two facilitating subjects	8.1%	14.1%

Qualifications (NVQ), 2011



Social Mobility

The Social Mobility Commission publishes data relating to social mobility in the UK at the district level. Social mobility is tracked across life stages from early years (pre-school) to adulthood and is based off a range of data indicators. Each local authority district is given a rank based on its performance on these indicators – with 324 local authorities in total. A lower rank indicates greater social mobility.

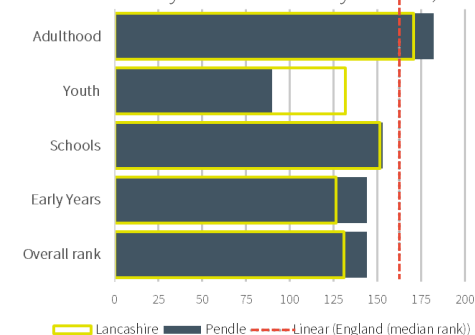
Overall (across life stages), Pendle is slightly better than average for social mobility. It performs particularly well for youth social mobility (i.e. age 15-19), although it performs worse than average for adulthood mobility. Pendle diverges from the Lancashire average in these two domains also, performing much better than Lancashire for youth but worse for adulthood. Overall, Pendle performs slightly worse than the Lancashire average.

Looking at specific indicators, around 30% of jobs in Pendle pay less than the Living Wage Foundation's minimum wage, compared to ¼ nationally. Of note is Pendle's good performance in Key Stage 5 performance of pupils eligible for free school meals – where over 40% achieved 2 or more A-levels by age 19, compared to 32% nationally.

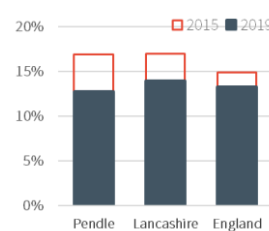
Pendle has a lower rate of workless households (12.7%) than England (13.3%), with approximately 3,000 workless households in the borough.

Data on those not in education, employment or training (NEET) is another important measure of social mobility, with a high rate amongst young people suggesting poor social mobility. Recent data does not cover Nelson, but in Lancashire 7.9% of 16-17 year olds are NEET, higher than England (5.4%).

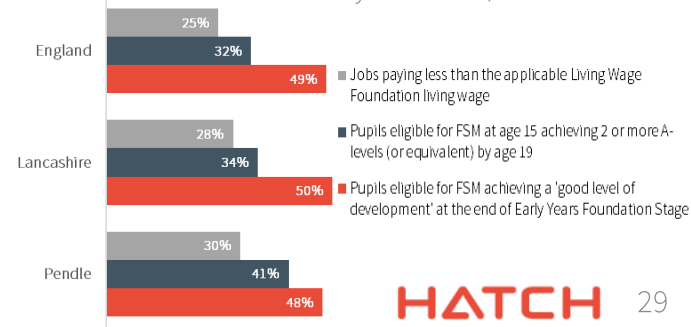
Social Mobility local authority ranks*, 2017



Workless households



Social Mobility indicators, 2017



Skill Demand

The Employer Skills Survey (2017) provides the most comprehensive and up-to-date information on employer skills needs. Both for the 2015 and 2017 editions approximately 1,900 businesses in Lancashire were surveyed. The granularity of the data is Lancashire-level.

In Lancashire, 16% of employers in Lancashire report skills gaps as of 2017, (down by 1% since 2015) a greater proportion than the North West's 15% and 14% nationally. Approximately the same proportion of employers in Lancashire, the North West, and England reported having at least one vacancy (20% of employers).

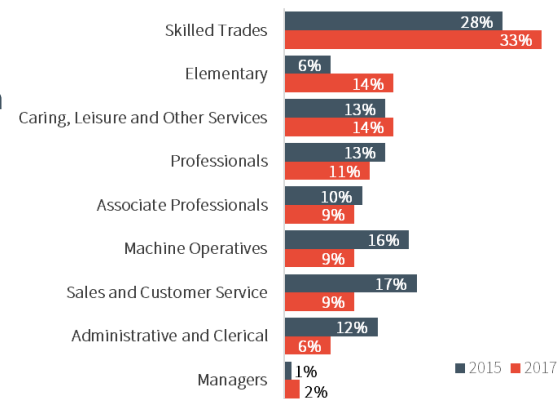
The survey looks at the prevalence of skills shortages and hard-to-fill vacancies (i.e. a job vacancy that has went unfilled for a long amount of time) by occupation. In both 2015 and 2017 Lancashire employers reported a higher proportion of hard to fill vacancies than the North West and national averages in Administrative and Clerical Occupations; Caring, Leisure and Other Service Staff; and Machine Operatives. In 2017, this was also the case for Skilled Trades and Elementary Roles.

Lancashire employers also reported above regional and national average skills shortages in both years in Skilled Trades, and in 2017 for Caring, Leisure and Other Services; Machine Operatives and Elementary Roles.

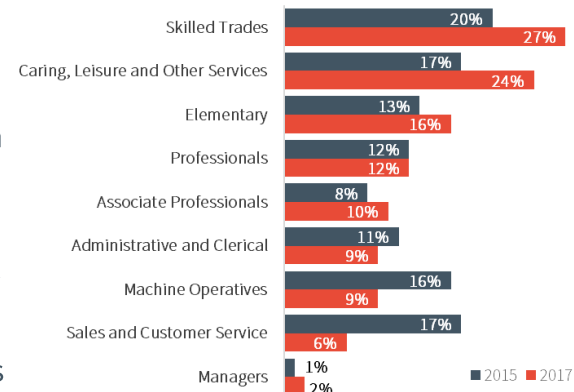
The East Lancashire Quarterly Economic Survey asks employers in Lancashire about their recent activities. The Q2 2020 survey asks if employers have attempted to recruit recently. Of those recruiting, over 1/3 (37%) reported difficulty finding a candidate – this was a substantial decrease from the Q2 2019 level of 63%. The most common occupation driving this difficulty was Skilled Manual / Technical, which accounted for 38% of hard-to-fill vacancies in Q2 2020 – another decrease from 2019, where the level was 55% of hard-to-fill vacancies.

Data source: Employer Skills Survey, 2017 (ONS)

Prevalence of skill shortages by occupation, Lancashire



Prevalence of hard-to-fill vacancies by occupation, Lancashire



+ Urban Regeneration, Planning & Land Use



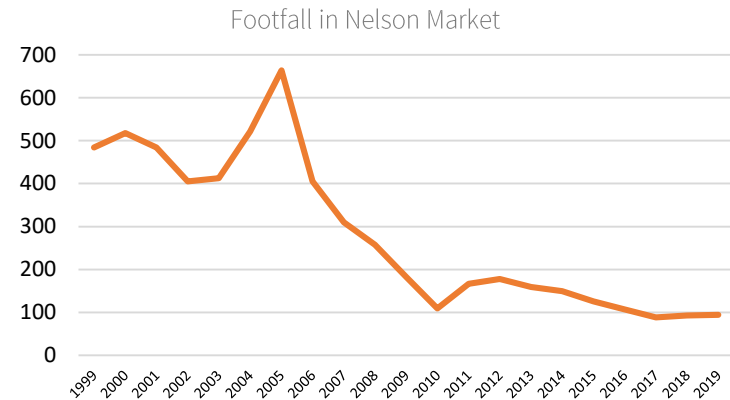
Nelson Town Centre

Nelson has a strong build heritage, particularly in and around the town centre, with some beautiful buildings, including the Town Hall and Grade II listed old Library, reflecting the towns history. In spite of this, the town centre has seen patterns of footfall have changed. A recent survey at Nelson market indicated significantly reduced footfall in this location. This suggests Nelson’s central business and retail area was already in a somewhat precarious position prior to the onset of Covid-19.

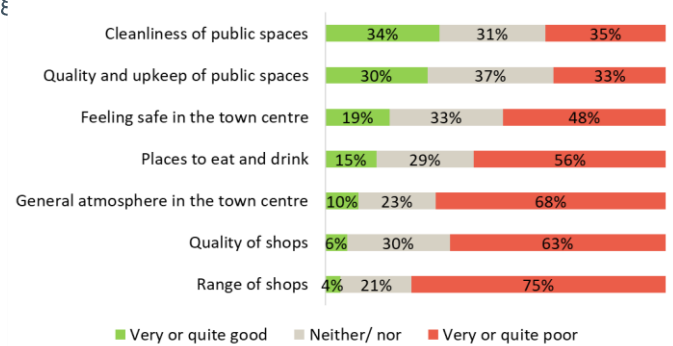
Nelson Town Centre is most likely to be used for general shopping, utilities and errands. A particularly low proportion of people visiting Nelson town centre for leisure purposes, especially visitors, suggests that an appealing recreational offer is currently lacking

Feedback from people who use Nelson is particularly negative for quality and range of shops, with ¾ of visitors to Nelson Town Centre describing the range of shops as poor.

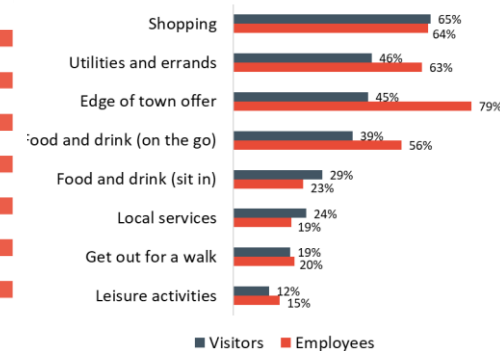
Indeed, no aspect of Nelson’s Town Centre was the object of substantial praise – with the most praised feature (cleanliness) considered good and poor by a similar proportion of visitors.



Feedback of regular visitors to Nelson Town Centre



Most popular uses of Nelson Town Centre



Source: Liberata indoor market counts; Nelson Town Centre Research 2019; Pearson Insight



Housing

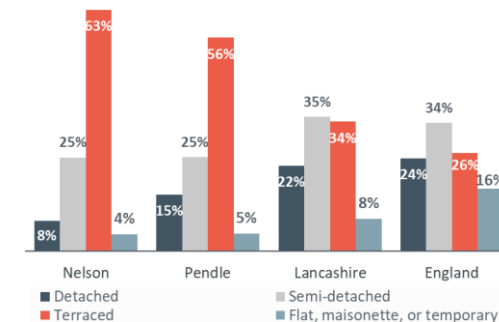
Nelson's housing stock was surveyed at the last Census, where almost 2/3 of the housing stock was terraced – substantially more than Lancashire and England; comparatively Nelson had fewer of each other type of housing than comparator areas, particularly detached housing. As such, Nelson could benefit from a more diverse stock of housing that appeals to a broader range of people. For instance, the relative lack of flats may act as a barrier to attracting younger professionals to live in Nelson.

The terraced housing which predominates in Nelson was mostly constructed at the end of the 19th/turn of the 20th century for working class households. As such, stock varies considerably in condition. Pendle Borough conducted a survey in 2009 which concluded that 14,400 properties within the borough's private sector housing stock failed the Decent Homes Standard (i.e. 36.3% of the private stock). Hazards such as physiological requirements, protection against infection and protection against accidents were the most frequent cause of indecency. Other common issues include 'thermal comfort failure', disrepair, lack of modern facilities and amenities.

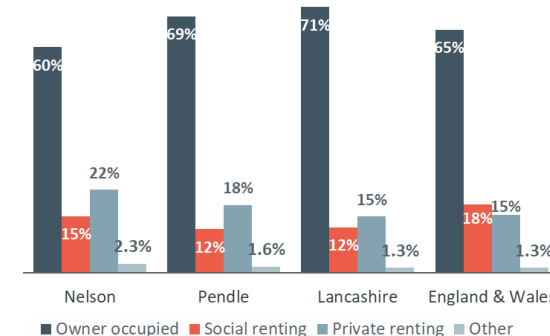
The issues outlined in the borough's 2009 survey are still reflected in current house prices in Nelson, which are substantially lower than comparator areas. The median price for a property in Nelson is around £67,000 as of 2018 – in Pendle it is £107,000 and in England it is £270,000. As such, house prices in Nelson are around 75% lower than the national average.

In 2011, most homes in Nelson were owner occupied (60.3%), though at a lower rate than Pendle (68.5%) and Lancashire (71%). Private renting is also more frequent in Nelson; account for 22.2% of the stock, higher than Pendle (18.1%). The same is true for social renting, which accounts for 15.1% of the stock in Nelson, compared to 11.6% across Pendle.

Housing stock by area, 2011



Housing tenure by area, 2011



Property market - Residential

Nationwide House Price Index figures from the second quarter of 2019 indicate an average house price of £162,410 in the North West. This represents a 2.9% increase from house prices achieved in Q2 2018 which compares favourably to a national increase of 0.4% over the same period.

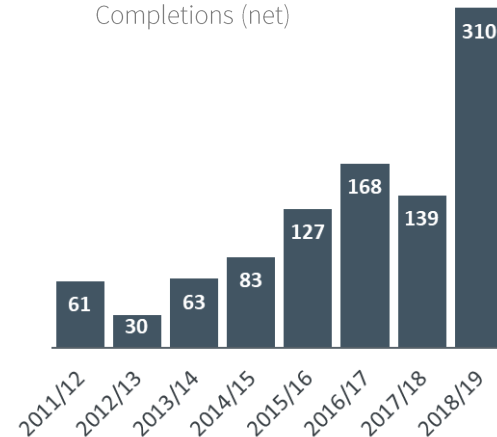
There is growing recognition that the low volume of residential construction over the last ten years has precipitated a housing crisis, and increasing housing numbers has become a political priority. In Pendle, the lowest geography for which recent housing delivery data is available, delivery rates (net completions) have fluctuated since 2011, although with considerable growth since 2012/13. In Nelson, 17 applications for residential developments of 10 or more units have been approved since September 2015, which will amount to +601 residential units.

As mentioned previously, house prices in Nelson are comparatively low. The average (all property types) property price in Nelson is £67,000. For new-build properties, which typically sell higher than re-sale properties, the average price for a 2-bed unit within the Northlight scheme on Thomas Street (Barnfield Construction), 1.2 miles away from Nelson town centre, is £150,000.

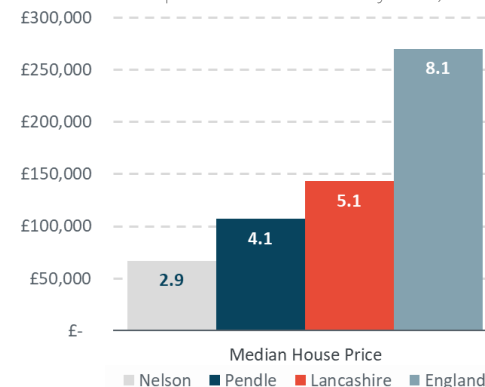
For resale properties, the average price for sales transactions with £58,000, likely indicative of the oversupply of terraced units and lack of larger higher value detached premises within the town centre, together with the relatively poor grade of local housing stock.

Fortunately Nelson, low prices result in a favourable house price – earnings ratio, as displayed to the right. A ratio of 2.9 implies that annual earnings are approximately 1/3rd of the median property price for an area. Provided employment and income opportunities, the low cost of living in Nelson provides the possibility for a high quality of life based on greater disposable income for residents.

Pendle Annual Residential Completions (net)



House prices and affordability ratio, 2018



Commercial property - Retail & Leisure

The retail, leisure and tourism sectors – which include hospitality – increasingly focus on locations already with a critical mass of activity, and often connected to major transportation corridors such as motorway junctions. Prior to Covid, these sectors were impacted by signs of UK consumer uncertainty tied to Brexit and stagnant wages, resulting in some restaurant and retail closures and consolidation. Since the Coronavirus pandemic, retail, leisure and tourism had to cease activities for much of the second quarter of 2020, resulting in immense strain on the sector. The Job Retention Scheme and business loan support programs have offset and delayed some of the impact of the otherwise catastrophic collapse in demand.

Takeaways predominate in Nelson town centre (10% of retail units), more than any other category. The high number of takeaways in Nelson, coupled with the lack of restaurants and cafes (4%) is limiting local eating choice and may contribute to the town's poorer health profile.

Pendle Rise Shopping Centre is Nelson's main shopping centre, containing 30 retail units. Occupiers tend towards value retail such as Greggs, Costa Coffee, Specsavers and Wilko. In 2017, c.65% of the retail units in Pendle Rise were occupied (compared to approximately 85% of units across the town).

The Pendle Retail Occupancy Survey (June 2018) reiterates Nelson's position as the borough's main retail centre, as it accounts for over a third (36%) of Pendle's units and 42% of the Borough's town centre floorspace.

Retail Type	Number	%
Takeaway	21	10%
Clothing/Accessories	19	9%
Food/Supermarket	19	9%
Home/DIY/Furniture/Homeware	16	8%
Hairdressers/Beauticians	13	6%
Service Providers	13	6%
Café/Restaurant	9	4%
Bank/Financial Services	9	4%
Phone/Electrical	8	4%
Health/Medical/Dentist/Optician	8	4%
Other	6	3%
Charity	5	2%
Books/Cards/Gifts/Toys	4	2%
Jewellers	4	2%
Beauty Retail	4	2%
Vape	3	1%
Betting	3	1%
Pub/Bar/Club	2	1%
Newsagent	2	1%
Fabric/Wool	2	1%
Discount	2	1%
Vacant	35	17%
TOTAL	207	100%

Commercial lease deals

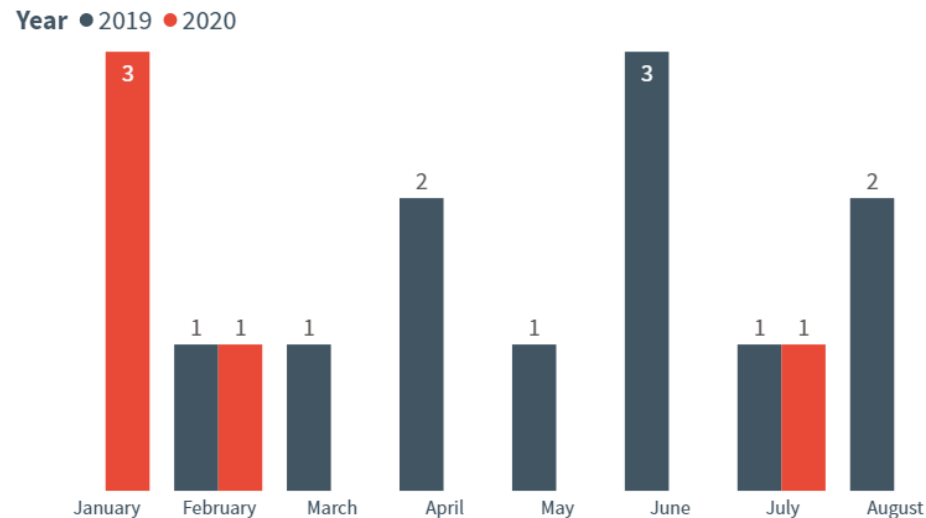
Since January 2019, 16 commercial lease deals of either industrial, office, or retail premises have taken place in Nelson. Only three of these 16 deals took place between January – August 2020; showing a substantial drop-off in demand for commercial property.

To achieve a better sample size, the adjacent chart combines commercial lease deals in Nelson, Colne and Barnoldswick, giving a better idea of the property market both around Nelson and in the main hubs of Pendle borough.

It can be seen that commercial lease deals have dropped off significantly in 2020, despite a busy January. Not a single commercial lease deal was recorded by CoStar for the combined area between March – June 2020, owing to the pandemic.

Of all deals in this area since January 2019, five were for office premises, eight were for industrial, and ten were for retail. In 2020, there has been one office lease, and two leases respectively of industrial and retail in the Nelson, Colne and Barnoldswick combined market.

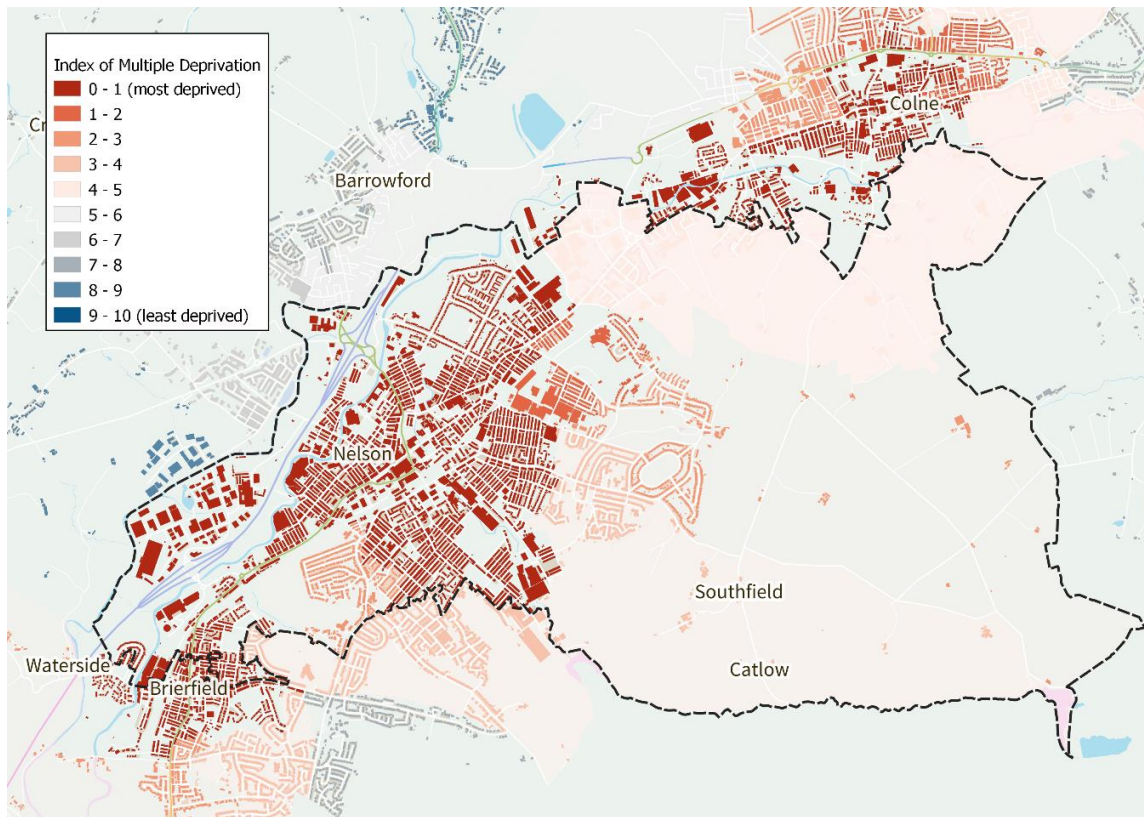
Commercial lease deals in Nelson, Colne and Barnoldswick



Multiple Deprivation

The adjacent map shows Multiple Deprivation in Nelson in 2019. Multiple Deprivation is based on data from a number of different domains of deprivation, including income, health and housing. Each small area is ranked based on these domains, with each area falling into a decile. The darker shades of red indicate higher levels of multiple deprivation, with the area being in a top decile for deprivation.

With the dotted line marking the LSOA-defined border of the town, it can be seen that virtually all of Nelson is within the top three deciles for multiple deprivation – indicating that Nelson experiences some of the highest deprivation in England, particularly in and around the Town Centre.



Health

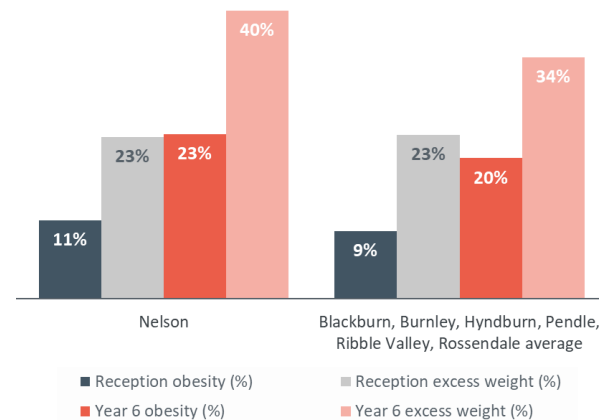
The latest data on life expectancy in Nelson shows both a shorter total and healthy life expectancy than England. The gap is largest in the female healthy life expectancy category, where Nelson lags England by 10 years.

Nelson also has a comparatively smaller proportion of people in good health, and slightly more people in bad health than comparator areas. It should be noted however that the picture may have changed since the last Census in 2011, although the more recent data on Healthy Life Expectancy indicate that Nelson continues to experience poor health outcomes.

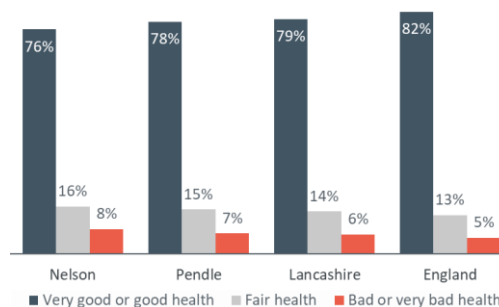
Nelson also experienced higher rate of emergency hospital admissions than England. Addressing these poorer health outcomes will bring intrinsic as well as economic benefit, with less activity lost to ill-health.

The Pendle Wavelengths development, which offers indoor leisure opportunities in the form of a state-of-the-art gym, swimming pool and spa facilities; will go some way towards enabling the residents of Nelson to improve their lifestyles and health outcomes.

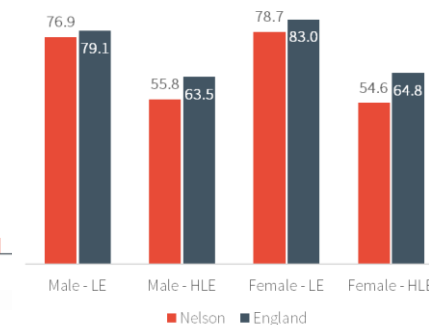
Childhood obesity and excess weight, 2017



General health state by area, 2011



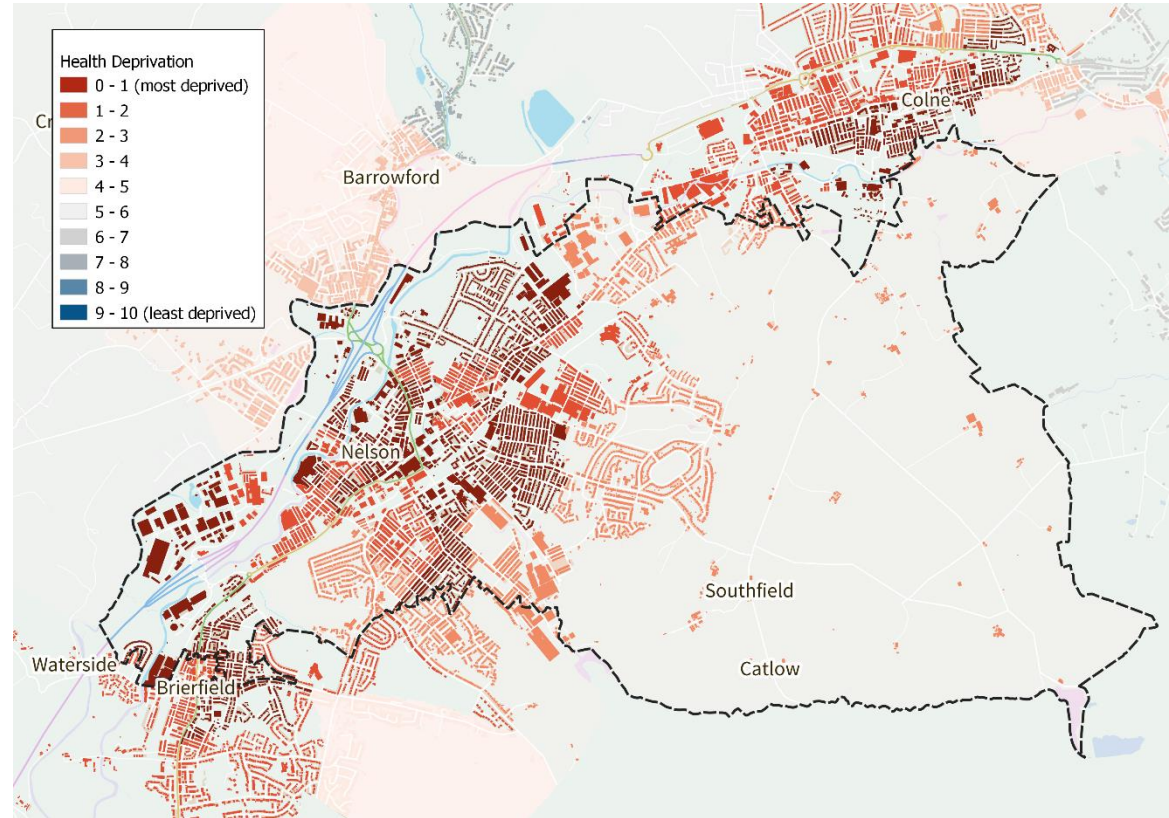
Life Expectancy and Healthy Life Expectancy (years), 2009 to 2013



Health Deprivation

The adjacent map shows Health Deprivation in Nelson in 2019. Health deprivation is one of the specific domains of multiple deprivation seen on the previous slide, and can be isolated in the data. Again, the darker shade of red indicates greater health deprivation, with the darkest shade indicating the area is in the top decile for health deprivation in England.

It can be seen that virtually all of Nelson, including the areas immediately outside of the town, experience high levels of health deprivation. Unlike multiple deprivation, there is a small level of variation within the core of Nelson, with some areas just falling outside of the top 10% most deprived.



Active Lives and Participation

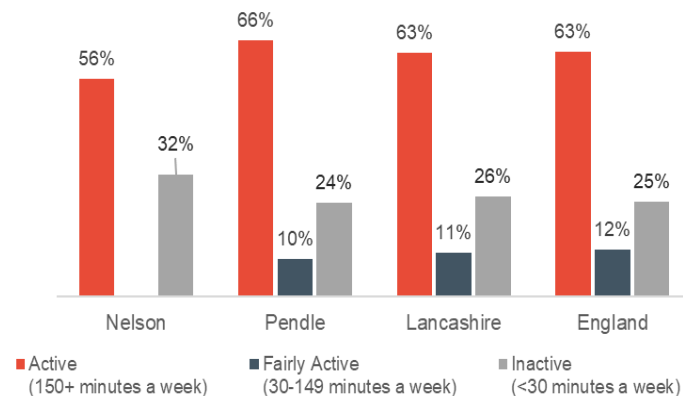
The Active Lives Survey tracks participation in sports and physical activity across England, with some data available at the Nelson-level.

In congruency with the health challenges of the town, residents in Nelson have a higher rate of inactive lifestyles – i.e. little physical activity, and lower rates of physical activity (participation in sport or exercise on a non-infrequent basis). Over half (56%) of residents in Nelson lead ‘active’ lifestyles, defined as 150 minutes of moderate physical activity a week, compared with 2/3 in Pendle and just less than this (63%) in Lancashire and England.

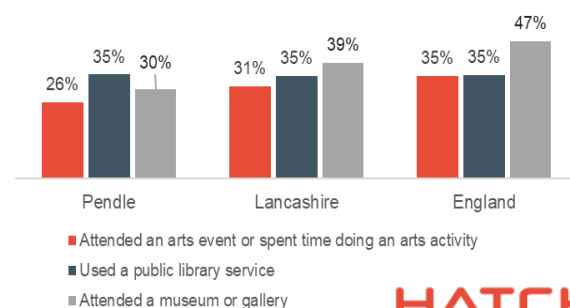
Almost 1/3 of residents in Nelson engage in fewer than 30 minutes of exercise or physical activity per week – ‘inactive’ lifestyle’ – compared to approximately 1/4 in Pendle, Lancashire and England. As such, it can clearly be seen that Nelson lags behind other areas in terms of participation in sport and exercise, a fact inextricably tied to the town’s poorer health outcomes.

When looking at participation in the arts and culture, data collected on behalf of Arts Council England as part of the Active Lives survey reveals somewhat of a lag between Pendle and Lancashire and England, with approximately 26% of Pendle adults engaging in an artistic activity at least once in the past year, compared with 35% of adults in England. Rather than suggesting a lack of appetite for the arts in the North West, this more than likely reflects a comparative lack of cultural and artistic activities as well as facilities at the borough-level. However, with the opening of the ACE centre in Nelson, a purpose-built arts, culture and enterprise venue, an increase in culture and arts engagement is to be expected, which will contribute to Pendle’s ability to close the gap in participation with England.

Participation in sports or physical activity, 2019



Adult engagement with the arts: at least once in past year, 2017



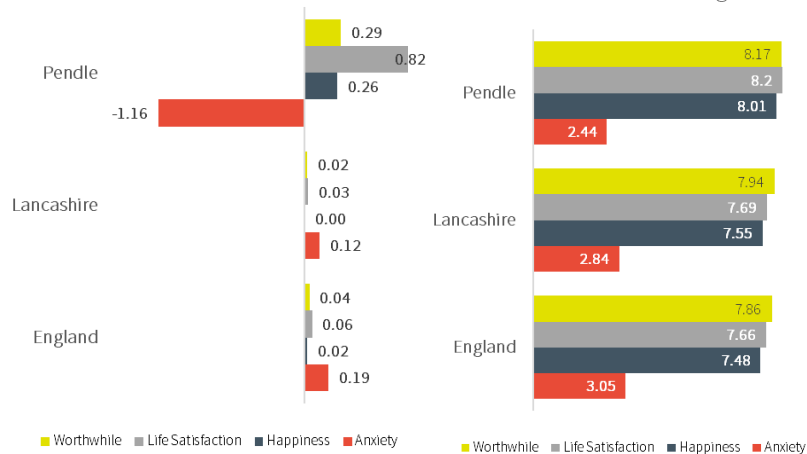
Wellbeing

Wellbeing data is collected by the ONS via survey at the district level. The ONS methodology advises against drawing strong conclusions from cross-area comparisons, and instead suggests wellbeing measures are best considered in one place over time. As such, both absolute levels of wellbeing and change in wellbeing between 2015-20 are shown to the right.

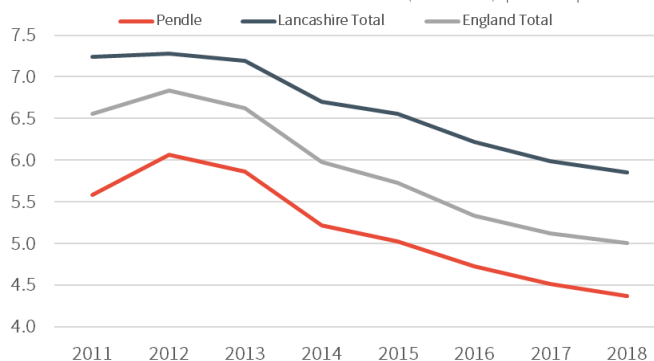
It can be seen that Pendle has shown greater improvements across all measures of wellbeing (a lower / decreasing Anxiety score is better) than comparator areas. Each wellbeing measure is graded on a ten point scale, so an improvement of 1 point would be equivalent to a 10% improvement. As such, the proportion of people agreeing that their pursuits in life (such as work) are 'worthwhile', the proportion overall satisfied with life, and the proportion who are happy, have increased in Pendle by approximately 3%, 8% and 3% respectively since 2015. Furthermore, the proportion of people reporting having felt anxiety in the recent past declined by approximately 12% over the same period. These encouraging signs in Pendle contrast with worsening anxiety in Lancashire and England, with only fractional improvements on the other measures.

The positive indications from Pendle must not obscure the local concerns of Nelson, which has a unique health and wellbeing profile, although the ONS data does not permit quantitative analysis of wellbeing measures in Nelson. Looking at an alternative measure, 4 out of Nelson's 6 wards registered higher than average admissions for intentional self-harm than the national average according to the last Census, which suggests that Nelson may be acutely affected by this issue.

Change in levels of wellbeing, 2015-2020 Levels of wellbeing, 2020



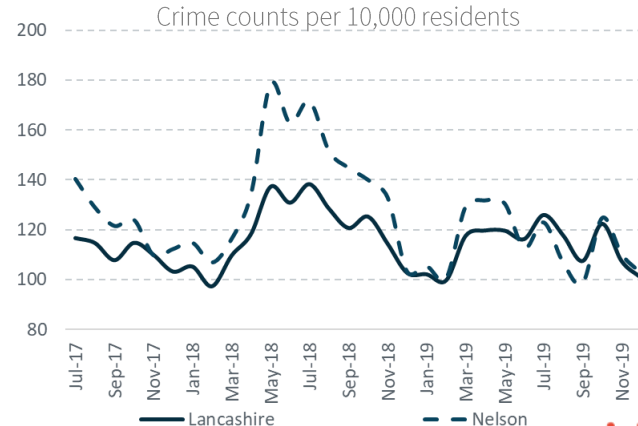
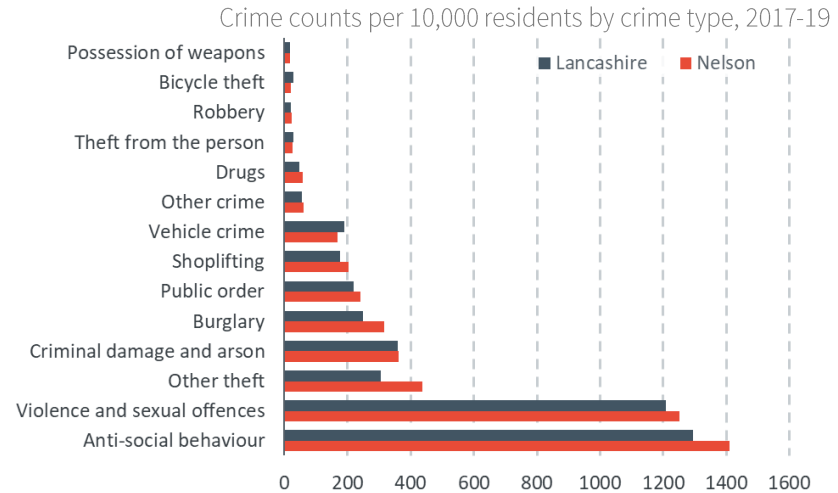
Carbon dioxide emissions (tonnes) per capita



Crime

Crime in Nelson has fluctuated over the past 3 years, as measured by crime counts per 10,000 residents. Nelson's trend somewhat mirrors Lancashire, except for more exaggerated peaks in crime counts occurring in summer 2018 and spring 2019.

Anti social behaviour and violence and sexual offences accounted for well over half (58%) of registered crime in Nelson during 2017-19; this was also the case in Lancashire, although Nelson has a slightly higher incidence of such crimes per capita.



+ Connectivity



Infrastructure

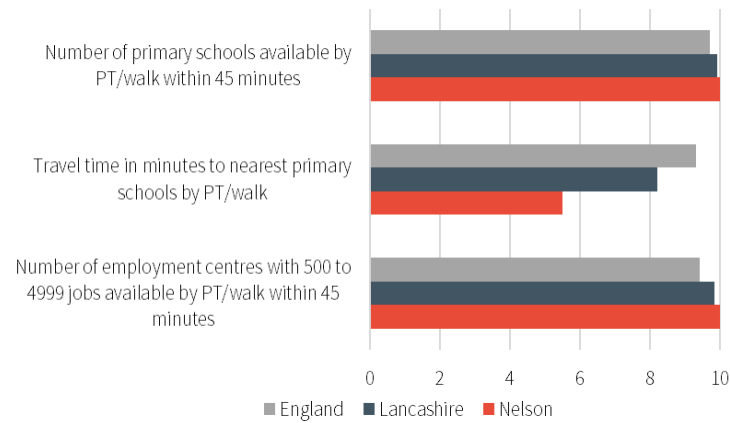
Nelson is situated to the immediate south-east of junction 13 of the M65, which acts as the main vehicular access to the town. As such, the M65 motorway and existing rail line to Nelson provide decent transport capacity for the area but also cause significant severance between the town centre itself and the residential and rural areas north and south of the town.

In 2017, capacity improvements in the form of roundabout layout modifications and the addition of traffic signals were made to Junction 13 to reduce congestion and improve vehicular access through the junction. Improvements were also made to Junction 12 to support the extension of Lomeshaye Industrial Estate, Pendle's strategic employment site

In terms of local connectivity to amenities, Nelson is marginally better connected than the England and Lancashire averages (measured in journey time) to key amenities such as employment centres and primary schools. For instance, on average it takes just under 6 minutes to walk to a primary school from a residence in Nelson, but over 8 minutes in Lancashire and England. Nelson also enjoys access to an average of ten substantial employment centres (500-4999 jobs) through a 45-minute walk or trip on public transport, whereas the Lancashire and England averages are below ten centres.

The following slides focus on specific modes of transport– driving, public transport, and cycling – and their corresponding infrastructure, in Nelson.

Access to schools and employment centres, 2017*



Nelson and the wider motorway network



Data source: Census, 2011 (ONS); Department for Transport, 2017; Nelson Masterplan Issues Paper, Cushman & Wakefield
*Note: journey times are averages (mean) of constituent MSA areas

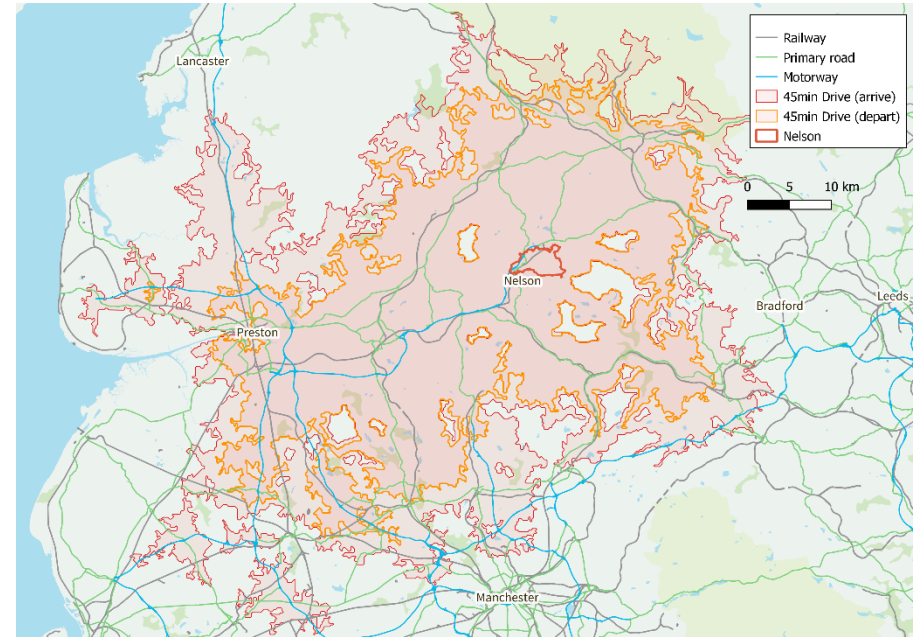
Connectivity - Driving

Nelson is served by the A682 (Scotland Road) which passes through Nelson due south-east from the junction of the M65. The A682 (Scotland Road) passes through Nelson in a south-easterly orientation from the M65 (Junction 13) to the mini-roundabout with Sagar Street. At this point the A682 follows a south-western path towards M65 Junction 12 and Brierfield. It is largely single-carriageway with the exception of approximately 130 metres of New Scotland Road which extends from Pendle Street to the A56 Leeds Road.

The adjacent map shows the area from which one can arrive at or depart from Nelson by 9am of a weekday. As such, the former represents Nelson's in-commuter catchment and the latter Nelson's out-commuter catchment.

Connectivity is better to the west of Nelson, with Preston falling in both catchments but Bradford in neither. Parts of Greater Manchester can reach Nelson within 45 minutes by car, although reaching Greater Manchester by car from Nelson will take longer.

Access to Nelson via car is further facilitated by widespread free parking, as Pendle Borough Council is amongst only a small number of local authorities in Lancashire which offers free parking. However, signage is lacking and, hence, visitors to Nelson may struggle to locate a suitable parking space. There are 16 council-owned car parks in Nelson, providing a total of 583 bays.

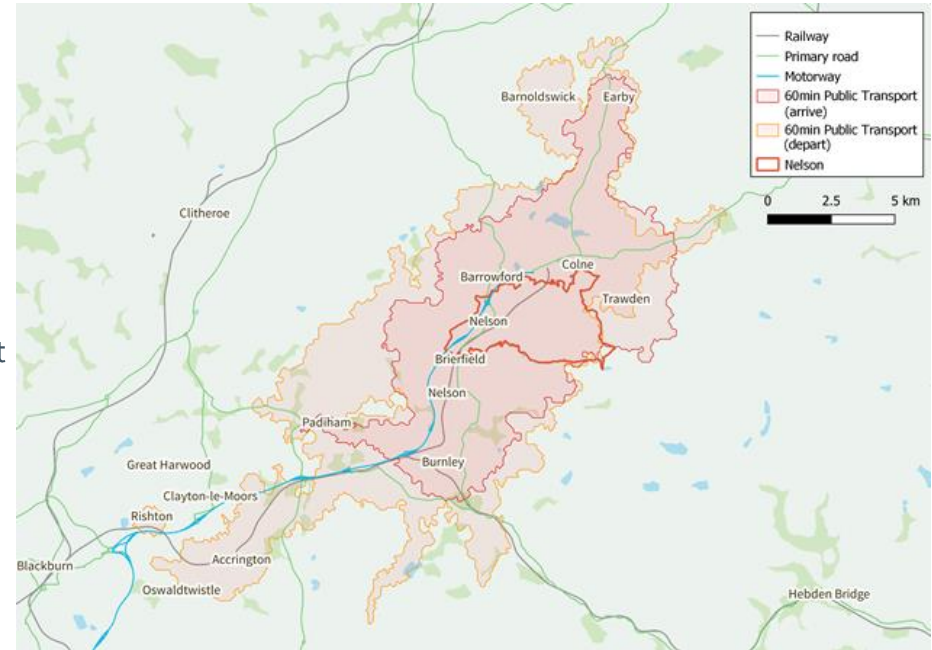


Data source: Travel Time Platform; Nelson Masterplan Issues Paper, Cushman & Wakefield

Connectivity – Public Transport

Nelson rail connectivity is currently limited to locations such as Accrington, Blackburn and Preston but there are current proposals to improve wider public transport accessibility to Nelson. The 11.5 mile Skipton – Colne line, closed in 1970, is proposed to re-open, offering a new link between North Yorkshire and Lancashire. The Skipton – East Lancashire Rail Action Partnership (SELRAP) has proposed reopening of the line to include an intermediate station at West Craven Parkway. This option could greatly improve rail connectivity to Nelson and reduce the reliance on private vehicle to access the town. Nelson's public transport does benefit from the presence of Nelson Interchange located to the west of Railway Street and south of Broadway. The facility includes a covered passenger concourse leading to ten bus stands and a direct link to Nelson Railway Station.

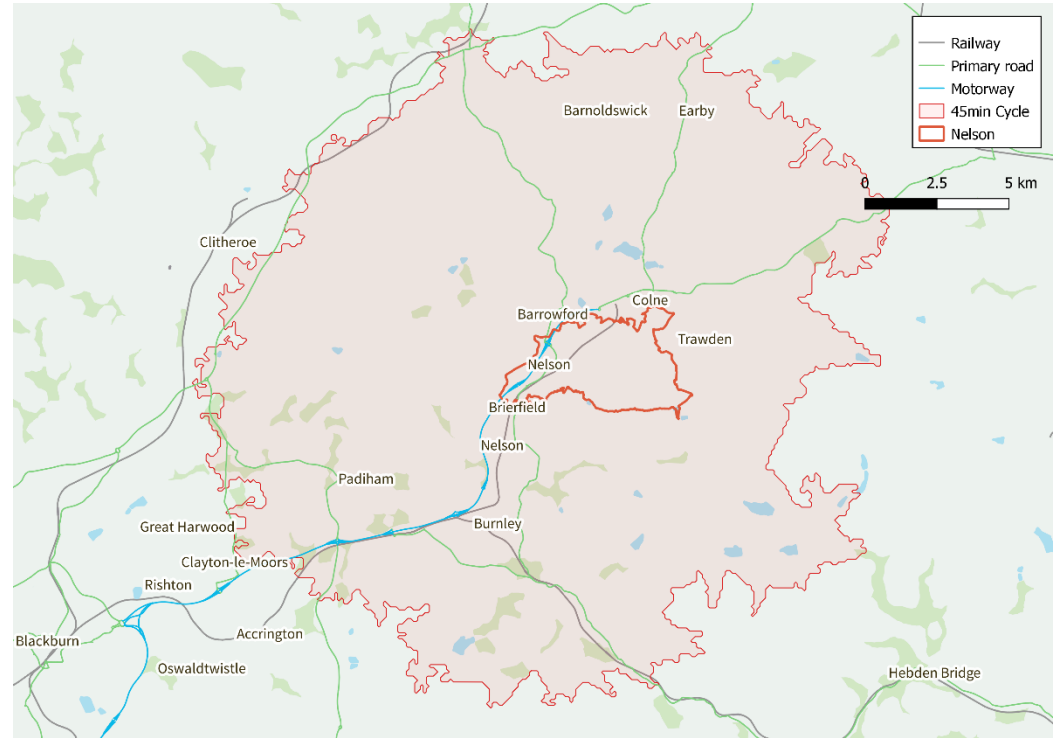
The limited rail connectivity is borne out in the travel time analysis, which shows Nelson to be far less connected via public transport than car, with both public transport catchment areas a fractional size of their car counterparts. The out-commuter (depart) area is larger than the in-commuter area. Neither Clitheroe or Blackburn can be reached within an hour using public transport from Nelson.



Cycling connectivity

The surrounding towns of Colne and Brierfield are sustainably linked to Nelson being within a 15 and 10-minutes cycle time respectively. Many of the larger, high quality green spaces are also accessible by cycle including Victoria Park to the west of the town centre (10-15 minutes) and the edge of the Forest of Bowland AONB (15-20 minutes). Within 45 minutes, Barnoldswick is reachable on bike, providing access to the Rolls Royce employment hub. On the other hand, Clitheroe lies just outside the 45-minute catchment.

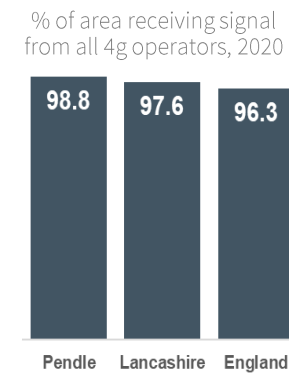
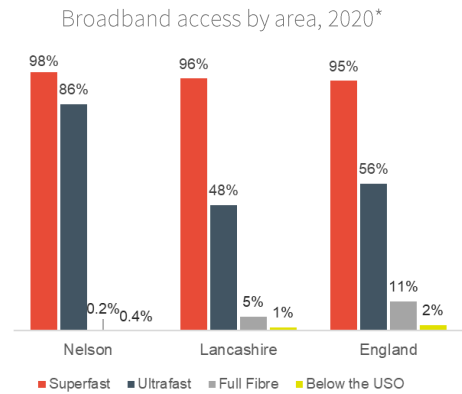
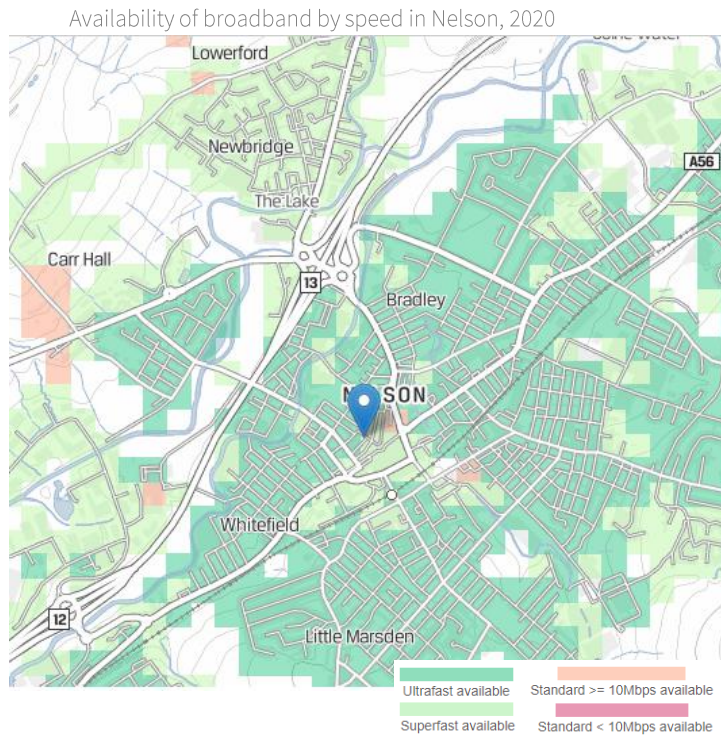
Nelson possesses a number of painted cycle lanes on major roads, but little in the way of dedicated ‘Dutch-style’ cycle infrastructure. There is a 50m stretch of on-road cycle route that passes along the A56 Leeds Road. An advanced cycle stop line is provided at the junction with the A682 New Scotland Road. A shared footway/cycleway is provided on the southbound carriageway of the A682 New Scotland Road (Photos 8a) and there is a contraflow cycle lane on Manchester Road which provides a link from New Scotland Road to Pendle Rise Shopping Centre. Furthermore, the Leeds Liverpool Canal acts as a major strategic cycle and pedestrian route through Pendle and can be reached within a 10-minute walk to the north of Nelson Town Centre.



Digital Connectivity

Nelson enjoys decent broadband and 4g connectivity. Compared to Lancashire and England, a greater proportion of premises have access to super and ultrafast broadband speeds. The same is true of 4g wireless access, which covers almost 98% of Nelson.

Looking at coverage within Nelson at the most granular level permitted, it can be seen that the town enjoys wide coverage of ultrafast broadband, although small pockets around Scotland Road and Netherfield Road currently only have access to ‘Standard’ speeds, which are now comparatively slow. Furthermore, Full Fibre connectivity (the latest in broadband technology, which omits the need for transformer hubs and connects households directly to the internet) is negligible (only 43 out of 14,188 premises in Nelson have Full Fibre).



Data source: Ofcom, 2020
*Note: USO stands for Universal Service Obligation, the statutory minimum broadband provision speed



COVID Impact

COVID Exposure

Understanding the extent to which Nelson has been exposed to the most significant economic impacts of Covid-19 will give us an understanding of potential medium and longer term impacts, strategies necessary to best aid recovery and indications of any prevailing economic strengths and weaknesses.

Immediate market contractions are likely to be felt by the private sector in the shorter term while public sector employment will be more greatly exposed to government spending policy decisions. Nelson has a public/private sector employment split in line with the England rate (16% of employment in the public sector and 84% in the private sector). This may indicate that Nelson's exposure in regards to private/public sector employment vulnerabilities and opportunities is in line with the national level.

According to analysis of the town's business and employment base, there is a high rate of dependency on the manufacturing sector, particularly aerospace manufacturing. This sector has already, and will likely continue, to face some of the most significant contractions as a result of Covid-19 and the economic restrictions that have followed.

Indicators of the scale of Nelson's exposure to the impacts of Covid-19 are demonstrated in the table below. Although indicators are for the wider district, they are reflective of many characteristics within the town. The table shows that the town has significant economic vulnerabilities– such as exposed sector employment and self-employment . It also indicates high and very high vulnerabilities in terms of health, specifically in relation to high rates of smoking and deprivation.

Indicator	National Average	Pendle	Benchmark
Aged 85+ (%)	2.43	2.26	Low
BAME (%)	14.58	20.14	Very high
Claimants as a proportion of residents aged 16-64	3.00	3.70	High
Mean total income (£)	33844	29,200	Average
% of premises below the USO	0.43	0.10	Low
Travel time in minutes to nearest food store by PT/walk	9.04	7.06	Very low
Employment at risk (%)	48.80	69.29	Very high
COVID GVA impact (%)	14.26	16.85	Very high
Self employed (%)	15.50	18.60	Very high
Percentage of adults (aged 18+) classified as overweight or obese	62.34	62.12	Very low
Estimated diabetes diagnosis rate	77.95	83.83	Average
Smoking Prevalence in adults (18+) - current smokers (APS)	13.88	17.42	High
IMD - Proportion of LSOAs in most deprived 10% nationally	10.00	31.58	Very high
Furloughed employment take up rate (%)	29.72	37.00	Very high
NEETs %	5.15	4.23	Low

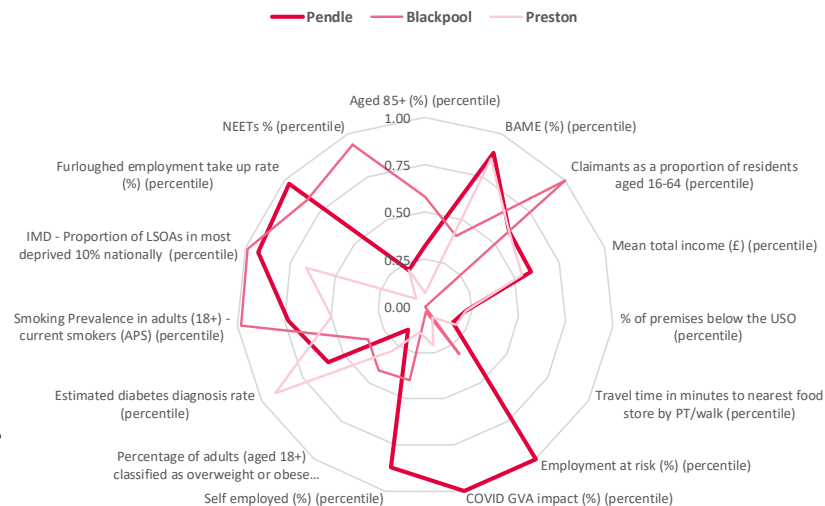
COVID Impact

Measuring the immediate economic impacts of Covid-19 in Nelson shows a varying degree of impact. As with many areas there has been a rapid increase in people claiming out-of-work income support. The claimant count shows that an 81% of individuals claiming universal credit between January and June 2020. Although substantial, this is a lower than the national increase in this period which was 120%. This may be explained by the sector composition of Nelson and its reduced dependency on some of the most impacted sectors.

There is also some indication that since the initial start of Covid-19 and the following restrictions Nelson has seen an increase in new business incorporations. Between January to June 2019 93 new businesses were registered in Nelson, during this period in 2020 172 businesses were incorporated, an increase of 85%. This may be an indication of increased entrepreneurial activity in the town, or may be a result of reduced traditional employment.

Comparing the area to other key towns and cities in Lancashire gives a better comparative idea about the scale of the impact on the town and wider district. We can see for example, in this spider diagram, that Pendle has indeed been relatively insulated from the worst unemployment impacts, with a lower proportion of residents claiming out of work income support, than towns like Blackpool. However it is also clear that impacts on employment may emerge in the medium and longer term as the area has a high rate of exposed sectors – namely manufacturing. Some of these employment impacts have already begun to emerge across the district, with announcements of redundancies at the Rolls Royce operations in Barnoldswick.

Relative Exposure and Scale of Covid-19 Impacts in Pendle, Blackpool and Preston





Assets & Opportunities

Asset Audit

Nelson has a number of assets underpinning economic prosperity and well-being.

Asset Name	Summary Description
Transport	
M65	A682 links to M65 at Junction 13 and provides access to Blackburn and Preston (via the M61 continuation).
National Rail	There is an hourly service from Nelson towards Burnley Central, Accrington, Blackburn and Preston westbound and Colne, eastbound.
Airport	Leeds Bradford airport is 22.3 miles away or Manchester airport is 32.7 miles away.
Nelson Bus and Rail Interchange	The £4.5 million Bus and Rail interchange opened in 2008 and replaces the 1970s bus shelter. Services run to Burnley, West Bradford and Skipton
Health	
Pendle Community Hospital	The hospital comprises of three wards each accommodating up to 24 patients.
Fairmore Medical Practice	Runs NHS mainstream primary care practices via PWE Healthcare
Yarnspinners Wharf	Primary Health Centre
Education	
Post 16 Provision	Nelson and Colne College also offers post 16 provision including apprenticeships
Higher Education	Nelson & Colne College includes a University Centre with provision delivered from two campuses in Nelson and Accrington
Secondary Schools	Secondary Schools include; Colne Primet Academy, Fishermore High School and Pendle Vale College.

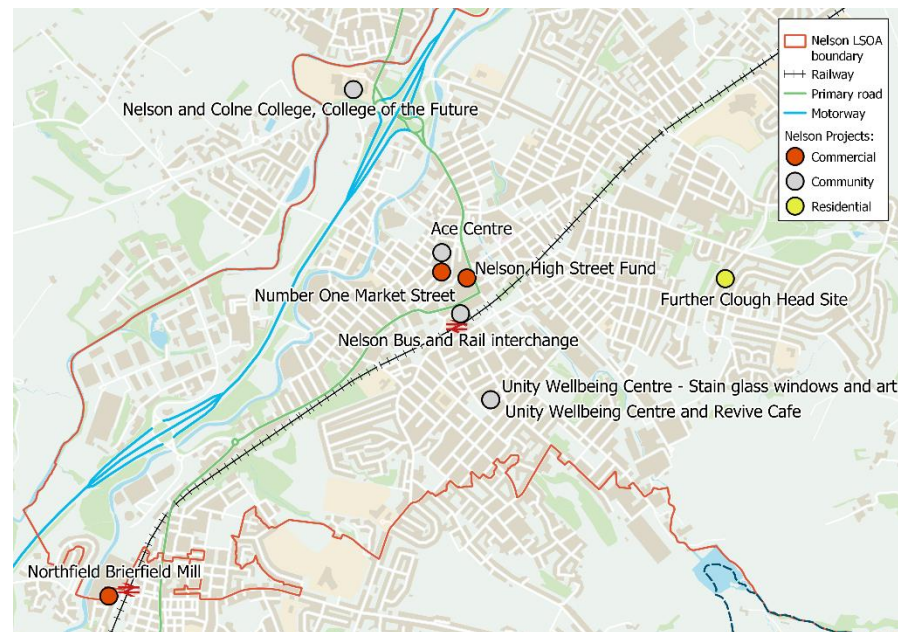
Asset Audit

Name	Description
Enterprise Infrastructure	
Valley Forge Business Park	A new business park being developed on the site of Reedyford Mill, currently housing six companies.
Pendle Business Centre	Based on commercial road this business centre is aimed at SMEs on a pro-rata basis, suites are between 265 and 1054 sq ft.
Riverside Business Park	Based in Barrowford Nelson the 280,000 sq ft of office space home to seven firms including a utilities specialist, lighting specialist and a pilates studio.
Whitefield Mill	Whitefield Mill and business centre is home to seven small businesses including a blind specialist, roof specialist and travel company.
Lomeshaye Industrial Estate	The industrial estate is a well-established site in Brierfield comprising industrial and warehousing units. There are plans to expand the estate.
Arts, Culture and Heritage	
Whitefield Conservation Area	A small conservation area designated in 2004 based in the immediate streets around St Mary's church (grade two listed). It incorporates mill town terrace streets, former cotton mills, and Grade II listed bridges over the Leeds-Liverpool canal.
British in India Museum	Opened in 1972 the museum focuses on the British rule of India.
Leisure	
Wavelengths	Leisure centre based in Nelson includes a six lane pool, wave machine and water based classes.
Seedhill Athletics Facility and Fitness Centre	The site boasts a fully fitted fitness suite with cardio-vascular and resistance equipment and a fully floodlit 6 lane, 400m synthetic athletics track and field.
Inside Spa	Wellness spa based in Nelson offering; including a Vitality Pool, Aroma Steam Room, Vitality Sauna, Herbal Sauna, Salt Inhalation Steam Room.
Country Parks	Nelson is located near to Forest of Bowland AONB, Forest of Trawden, Wycoller Country Park and in close proximity to the Penine Way

Current and recent projects in Nelson

There are a number of recent and proposed projects in Nelson which will support economic growth in the town.

Project	Lead Organisation	Description	Timescales
Further Clough Head Site	Pearl JV; Barnfield	338 new homes - Homes England Local Authority Accelerated Construction (LAAC) funding received	Estimated completion 2021
Number One Market Street	Pendle Council / Barnfield	Redevelopment of flagship building Number One Market Street – 300 new jobs to the area and new 'Contact Pendle' one-stop council services hub	Complete
ACE Centre	Pendle Council	Mixed-use development including a theatre, recording studios, function rooms, and office space	Complete
Nelson Bus and Rail interchange	Lancashire CC	New interchange covering both the bus and rail interchange works.	Complete
Unity Wellbeing Centre	Nelson TC	Development of community hub including installation of stain glass windows celebrating the life of suffragist Selina Cooper, a Nelson resident	Complete
College of the Future – Nelson and Colne College	Nelson and Colne College	Funding drive focusing on future demands of FE colleges with aim for College to provide strategic advice for local businesses	Ongoing
Northfield Brierfield Mill	Pendle BC / Pearl	Redevelopment of this 380,000 sqft complex.	Estimated completion 2023



Recent housing investments – Nelson and surrounding areas

These schemes include 500 additional housing units recently completed or nearing completion either within Nelson or nearby locations such as Colne.

All of the projects, except Whitefield, involve new-build properties, which will help to improve and diversify Nelson's housing stock, which is currently dominated by terraces dating back to the industrial era. The new properties will also meet modern standards of energy efficiency and habitability, which will improve standards of living in Nelson.

Name of scheme	Location	Description	Housing units	Timescale	Scheme Type
Whitefield	Every Street/Albert St, etc, Whitefield ward, Nelson	Refurbishment of terraced properties (inc 2 into 1s) and new build housing for a mix of open market sales and affordable by PEARL (Council JV)	94	Completed 2013/14	Residential
Priory Chase	Nelson	New housing development by Hobstones for Calico (RP)	39	Completed 2018/19	Residential
Colbran Street	Nelson	New housing development by Great Places Housing Group	23	Completed 2016/17	Residential
Deerwood Park	Knotts Lane, Colne	New 3,4 & 5 bed housing development by Persimmon on Colne/Nelson border	182	Started 2016/17 - ongoing	Residential
The Hallows	Reedley, Brierfield	New housing development by Barnfield	77	2011/12 - ongoing	Residential
Foxhills	Clitheroe Rd, Brierfield	Development of new build housing for a mix of open market sales and affordable by PEARL (Council JV)	35	To complete 2020/21	Residential
Greenfield View	Carry Lane, Colne	Development of new build housing for affordable & open market sales by PEARL (Council JV)	33	Affordable units completed; Market houses under development	Residential

Pipeline Housing investments – Nelson and surrounding areas

The residential schemes on this page identify c.600 additional dwellings in the pipeline for Nelson and immediate neighbours like Colne.

The Trough Laithe development, on the border between Nelson and Barrowford, is of particular importance as it is a strategic housing site at the borough level, and will include 500 additional dwellings.

Name of scheme	Location	Description	Housing units / floorspace	Timescale	Scheme Type
Langroyd Place	Former Oak Mill site, Colne	Development of new build homes for open market sales by PEARL (Council JV)	32	To complete 2021/22	Residential
Harrison Drive	Harrison Drive, Colne	Development of 79 new build affordable residential properties by PEARL Together (Council JV). Homes England funding sought.	79	Works to commence 2020/21	Residential
Trough Laithe	Barrowford	The borough's strategic housing site (can accommodate c.500 homes) owned by Peel and located on Barrowford/Nelson border. Homes England funding sought.	500	Reserved matters approval for 239 dwellings granted in Jul 20. Applicant: Northstone Development Ltd	Residential

Pipeline Mixed Use investments

The mixed use and employment schemes on this page will involve the development of c. 63,500 sq.m of additional floorspace in and around Nelson, with the 8,000 sq.m from Pendle Court already complete.

Permission has been granted for work to begin on the former Parkfield Works site, near Railway Street.

It is hoped that the Colne Health Centre scheme will be completed by 2021.

Name of scheme	Location	Description	New floorspace	Timescale	Scheme Type
Colne Health Centre	Colne Town Centre	Development of affordable housing for Peter Birtwistle Trust and 4 retail units by PEARL (Council JV)	695 sq.m (also 11 new housing units)	To complete end 2020/21	Mixed Use
Pendle Court	Former Reedyford Mill site, Nelson	Petrol station, nursery and employment units on a site just off J13 of M65.	c. 8000 sq.m	Completed 2020	Employment
Lomeshaye Industrial Estate Extension	Brierfield / Nelson	30 hectare extension of the existing Lomeshaye Industrial Estate, the borough's principal employment site. Phase 1 of the extension is currently on site. – a serviced site being delivered by the Council, onward development being carried out by PEARL. Phase 2 land is in private ownership.	Phase 1: c.14,000 sq.m floorspace Phase 2: c: 36,000 sq.m new floorspace	2020/21-2021/22 Outline planning granted, but timescales for delivery unknown	Employment
Former Parkfield Works site	Off Railway Street, Nelson	Redevelopment of cleared former mill site for employment use	4880 sq.m (new floorspace)	Permission granted. Unknown when works might commence.	Employment

Other Proposed Investments

Project	Lead Organisation	Description	Timescales
M65 upgrade options	Pendle Council	There are six shortlisted Bypass Options for the M65 to Yorkshire upgrade. One of these will go through Colne.	Tbc further economic and environmental assessments are being undertaken
Nelson Future High Street Fund	Pendle BC	Investment in the main shopping centre and former car park to reduce vacancies and improve the retail, residential and general offer of the town centre	Scheme in development



SWOT Analysis

Thematic SWOT – Urban Regeneration, Planning and Land Use

Five Defining...Strengths

1. Attractive setting surrounded by countryside, including Forest of Bowland AONB, Wycolle Country Park, Forest of Trawden, and the Pennine Way with panoramic views of Pendle Hill
2. Strategic employment site at Lomeshaye Industrial Estate
3. Linkage to a network of inter-related towns including Barrowford, Brierfield, Nelson & Colne
4. Heritage value including Whitefield Conservation Area, St Mary's Street Conservation Area & numerous listed buildings
5. Good range of local amenities including Council Contact Centre, Town Hall, Community Hospital and Leisure Centre

Five Defining...Weaknesses

1. Struggling town centre characterised by fall rents, voids and viability challenges
2. Poor physical environment in areas including landmark buildings of poor quality such as Pendle Rise detracting from image and perception
3. Oversupply of office space relative to demand resulting in vacant buildings and reduced footfall
4. Limited housing choice characterised by poor quality and terraced provision
5. Negative image and perception deterring visits and properties and lack of retail offer deterring visits and investment

Five Defining...Opportunities

1. Proximity to natural assets & heritage value to attract visitors and residents to the town
2. Opportunities to extend footfall, dwell time and spend in town through a diversified offer which attracts and serves a wider catchment
3. Future growth policy focus on Nelson with 70% of all new housing to be delivered in Nelson & Colne; Nelson as a priority for retail development and core location for employment
4. Funding opportunities through Town Deal & FHSF to tackle identified issues
5. Enhance perceptions and raise profile of the town to attract more visits and spend from surrounding affluent areas

Five Defining...Threats

1. Low property values limiting viability of new development
2. Climate change and risk of flooding with categorised Flood Zones 2 and 3
3. Changing demographic trends impacting on the demand for products and services
4. Impact of COVID on market confidence and changing consumer habits
5. Competition from larger towns of Burnley, Blackburn and Preston for occupiers

Thematic SWOT – Skills and Enterprise Infrastructure

Five Defining...Strengths

1. Large young and working age population
2. Culture and diversity and strength of community spirit
3. Improving qualification profile
4. Nelson & Colne College, one of the highest performing in England
5. Entrepreneurial spirit supporting business growth and vitality

Five Defining...Weaknesses

1. High levels of deprivation impacting on life chances, household income and health & well being
2. Lower value skill and occupation profile
3. Perceived lack of leisure offer, evening economy, retail choice, and modern housing detracting from town's offer to young people
4. Detachment of the College from the town centre hampering scope for synergy and impact
5. Peripherality of the town at the end of the M65 and poor transport links to West and North Yorkshire constraining labour market catchment

Five Defining...Opportunities

1. Diverse population and culture presenting an opportunity to celebrate and attract residents, visitors and investment
2. Strengthening the place proposition and offer of Nelson to cater for young people and families from all backgrounds
3. Capitalising on entrepreneurial culture to drive business start up and growth
4. Affordable location for businesses and residents to invest
5. Post 16 provision and access to higher level skills and higher paid quality employment

Five Defining...Threats

1. COVID and Brexit impact on investment and trade
2. Dependence on the manufacturing sector with key sub-sectors significantly impacted by COVID leading to job losses in major employers and supply chains within important sectors (aerospace)
3. Rising unemployment and changing nature of work creating skill mismatches and undermining potential for rapid reprofiling of the labour market
4. Technology and innovation driving change and competitiveness which Nelson needs to respond to
5. Limited breadth of employment and learning opportunities locally leading to out-migration of young people

Thematic SWOT – Connectivity

Five Defining...Strengths

1. Position on the M65 corridor (J12) providing linkages to key towns and cities
2. Proximity and economic links to West Yorkshire
3. Single track railway with hourly service terminating at Colne
4. Ability to access town by bus and rail including a relatively new Rail & Bus interchange
5. Pennine Cycleway passes through Nelson, part of the National Cycle Network
6. Green and blue infrastructure including public open green space, canal corridor

Five Defining...Weaknesses

1. Limited strategic accessibility at the end of M65 corridor and Colne rail line
2. Poor quality pedestrian and cycle infrastructure increasing separation and inaccessibility to the town centre
3. Inability to join the canal along the route, with a lack of frontage and space to capitalise on this asset
4. Weak links between the town centre and major employer areas discourage interaction with inhibited movement and parking challenges in the town centre deterring visits
5. Full fibre broadband is yet to reach Nelson

Five Defining...Opportunities

1. Policy focus on improving East-West connectivity including an aspiration to reopen the rail link between Lancashire and Yorkshire & M65 upgrade options
2. Investment focus on the M65 Growth Corridor as a key area of economic activity
3. Improve key routes and linkages within and around the town to make it easier and more attractive to get around and encourage more linked trips
4. Government focus on healthy towns, specifically encouraging more walking and cycling, and scope to use canal and surrounding green space
5. Enhance gateways and links to surrounding attractions

Five Defining...Threats

1. Steep topography causing physical and perceived barriers to movement and access
2. Falling demand for public transport as a result of COVID undermining viability of proposed improvements
3. Competing areas lobbying for government investment in transport and digital connections
4. Lack of investment in full fibre technology will undermine business competitiveness, investor interest, and digital inclusion