

Employment Trends in Horsham District

Business Register and Employment Survey (BRES) Analysis

Headline Data Summary 2016

Source

The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. The Survey collects employment information from businesses across the whole of the UK economy excluding farm agriculture, nor does it include self-employed who are not registered for VAT or PAYE schemes. The data is available from Nomis¹. There have been changes to the BRES coverage in 2016 to include solely Pay As You Earn (PAYE) based businesses, ONS have revised the 2015 data in order to be consistent with the latest release, so this report is based on the 2015 and 2016 data only.

Employment in 2016

- There were a total of 54,020 employee jobs in Horsham district in 2016 and contributes to 14% of the total in West Sussex.
- 48,410 (89.6%) of these employee jobs are in the private sector, Horsham has higher proportions of private sector employee jobs compared to both West Sussex (86.4%) and England (83.0%).
- The remaining 5,610 (10.4%) of employee jobs were in the public sector, Horsham has lower proportions of public sector employee jobs compared to both West Sussex (13.6%) and England (17.0%).
- 35,940 (66.5%) were employed full time, around two-thirds of the local employee jobs in Horsham. These figures are above the county trends but below national trends, West Sussex (65.7%) and England (68.1%). The reverse applies to part time employee jobs; 18,080 (33.5%) employee jobs in Horsham, below the county average and above national average, West Sussex (34.3%) and England (31.9%).

Employment Change 2015-2016

- There has been some employment growth in Horsham over the year 2015 to 2016 with 1,280 (2.42%) more employee jobs. This is lower than the county average (3.91%) and above national average (1.94%).
- The number of private and public sector employee jobs both increased by 390 (0.82%) and 880 (18.69%) respectively. The private sector change is below the county (3.53%) and national (2.27%) trends. The public sector change is 3 times higher than the county (6.35%) and higher than the national (0.34%) change.
- Full time employee jobs increased by 460 (1.31%) in Horsham. This is below the county average (2.84%) and above the national average (0.63%).
- Part time employee jobs increased by 810 (4.71%) in Horsham. This is below the county average (6.01%) and just below the national average (4.83%).

Change 2015-2016 Compared to the South East Region's Local Authorities

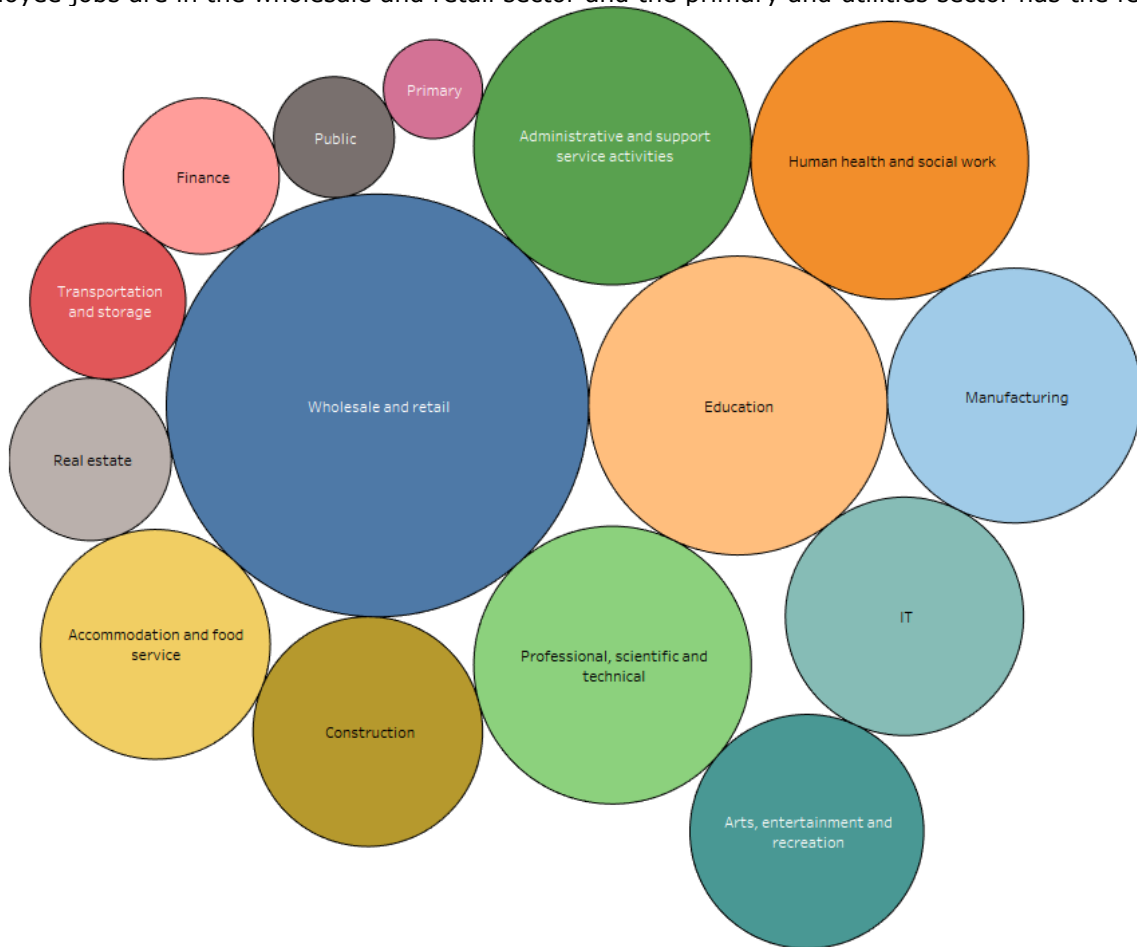
There are 67 district and borough areas in the South East region. By ranking these, with 1 indicating the highest level of growth and 67 indicating the lowest, we can measure the growth comparatively. The figures are calculated as a percentage difference between the 2015 and 2016 data. Horsham is ranked 36th in terms of total size in the South East and ranked 1st for public sector employment growth.

- 25** Horsham is ranked 25th out of the 67 district and borough councils in the South East Region for **employment growth** between 2015 and 2016.
- 28** Horsham is ranked 28th for **full time** employee change from 2015 to 2016.
- 29** Horsham is ranked 29th for **part time** employee change from 2015 to 2016.
- 44** Horsham is ranked 44th for **private** sector employee change from 2015 to 2016.
- 1** Horsham is ranked 1st for **public** sector employee change.

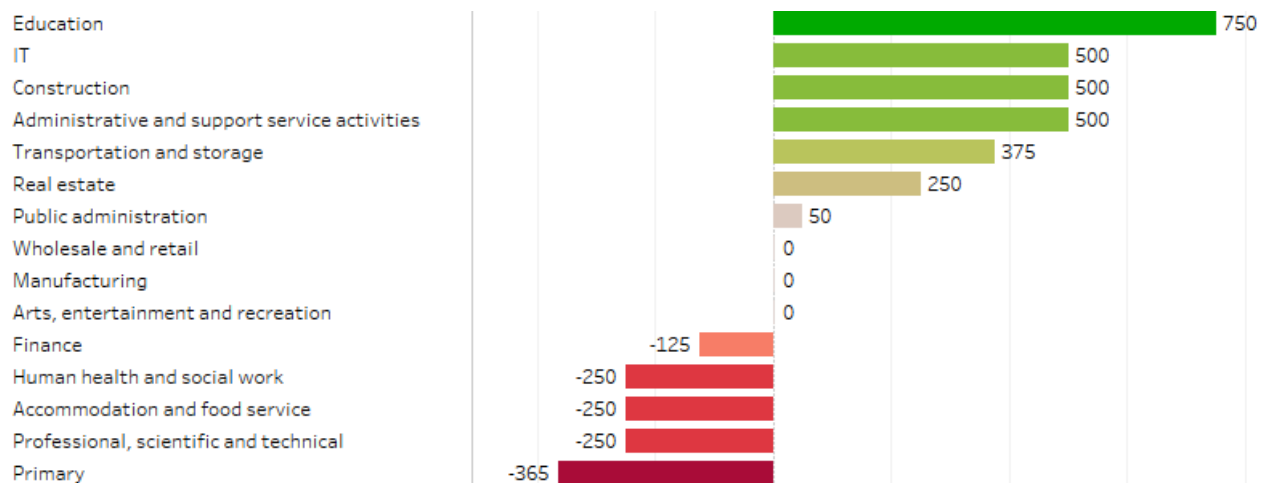
¹ The figures in this section are from the BRES public private open data source on Nomis <https://www.nomisweb.co.uk/>

Employment Sectors²

The below packed circles diagram shows the individual sectors as a proportion of the employee jobs in Horsham, the most employee jobs are in the wholesale and retail sector and the primary and utilities sector has the fewest.



- Five main sectors in Horsham account for over half (57.0%) of employee jobs, these are in the wholesale and retail trade including repair of motor vehicles and motorcycles (20.4%), education (10.2%), professional, scientific and technical (8.8%), administrative and support services (8.8%) and human health and social work (8.8%).
- The employee change per sector from 2015 to 2016 is shown in the table below, green highlighting an increase and red a decrease.



² The figures in this section (industry related) are from the BRES open data source on Nomis <https://www.nomisweb.co.uk/>

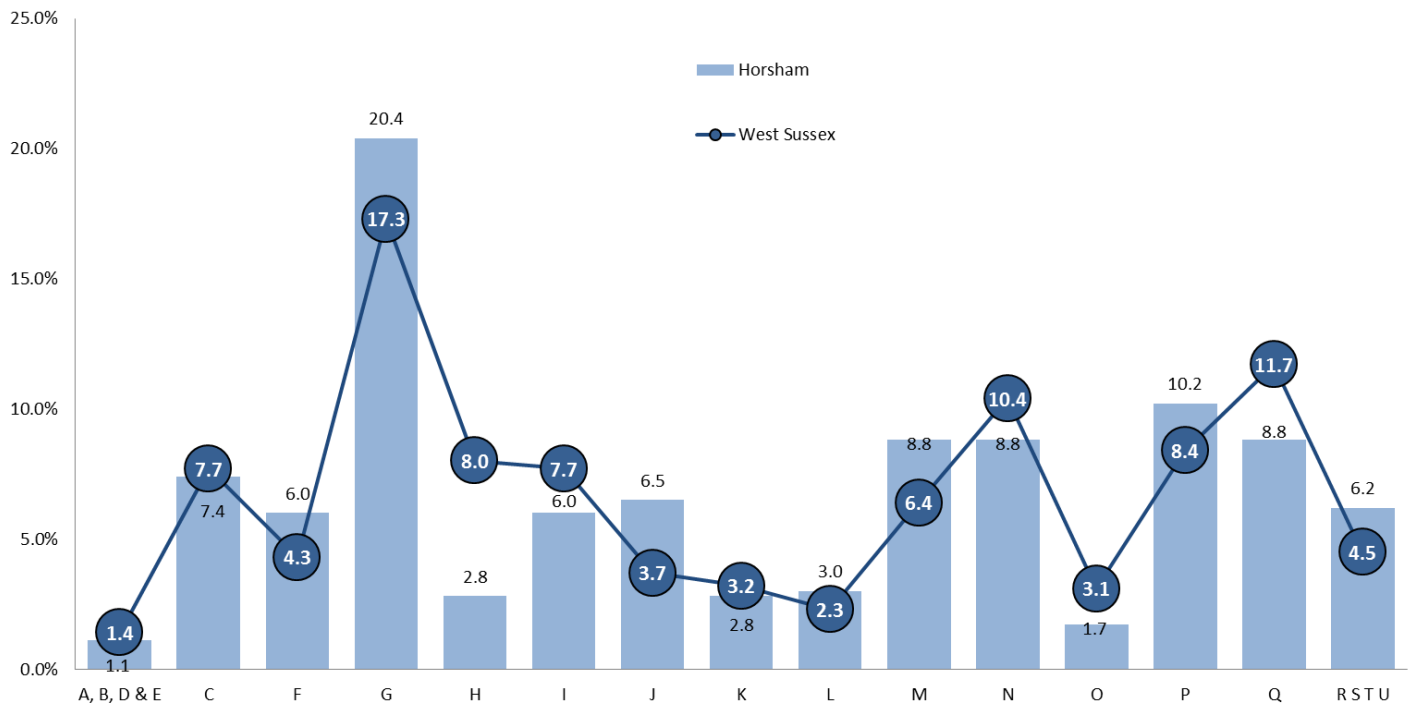
Percentage of Employees in Employment by Sector 2016

The table below shows the percentage of employee jobs by sector for Horsham, West Sussex, South East and England. The sectors highlighted are the top five in those areas. As can be seen from the table, professional, scientific and technical activities is a key sector within Horsham compared to the county, region and England. Construction and information and communication are also higher than the county, regional and national trends.

Industry	Horsham	West Sussex	South East	England
A, B, D & E : Primary and Utilities	1.1%	1.4%	1.9%	1.8%
C : Manufacturing	7.4%	7.7%	6.3%	8.0%
F : Construction	6.0%	4.3%	4.9%	4.5%
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	20.4%	17.3%	16.2%	15.3%
H : Transportation and storage	2.8%	8.0%	5.0%	5.0%
I : Accommodation and food service activities	6.0%	7.7%	6.8%	7.3%
J : Information and communication	6.5%	3.7%	6.1%	4.4%
K : Financial and insurance activities	2.8%	3.2%	2.8%	3.6%
L : Real estate activities	3.0%	2.3%	1.9%	1.7%
M : Professional, scientific and technical activities	8.8%	6.4%	8.8%	9.0%
N : Administrative and support service activities	8.8%	10.4%	9.1%	9.2%
O : Public administration and defence; compulsory social security	1.7%	3.1%	3.1%	4.0%
P : Education	10.2%	8.4%	10.1%	9.0%
Q : Human health and social work activities	8.8%	11.7%	12.0%	12.8%
R S T U: Arts, entertainment, recreation and other services	6.2%	4.5%	4.8%	4.6%

Horsham compared to West Sussex by industry

The table below shows how the percentages of employee jobs by industry in Horsham compare with the county average.



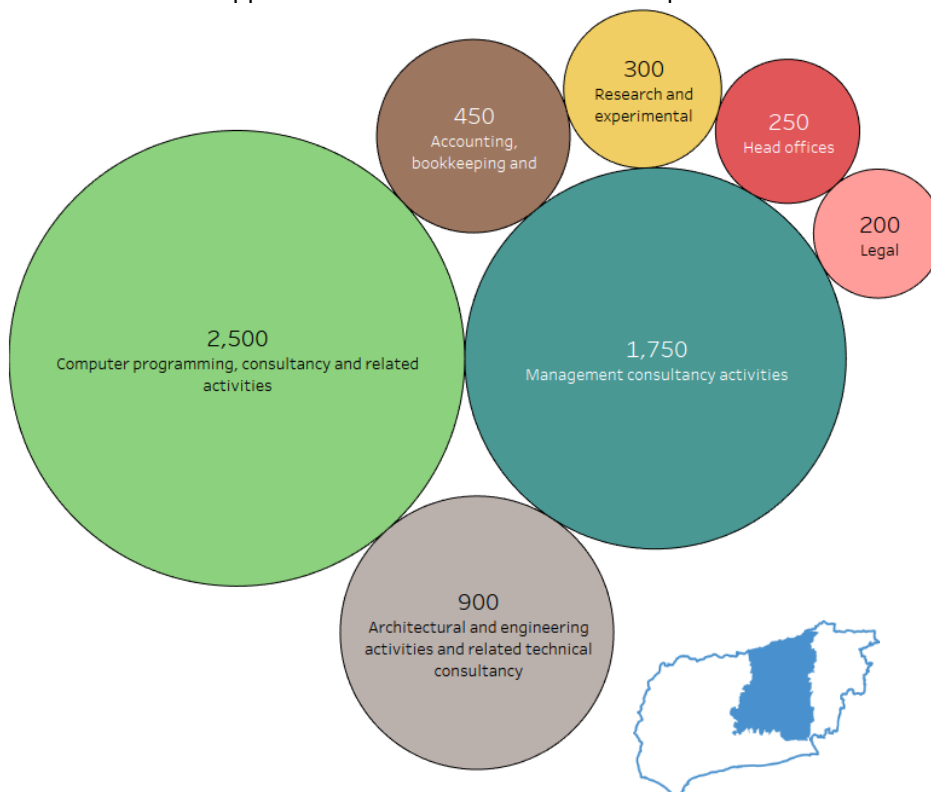
The information and communication sector (J) and the professional, scientific and technical activities sector (M) show the proportions of employee jobs in Horsham are higher than the county averages while the transportation and storage sector (H) shows a significantly lower percentage than the county average. This sector is one of the top 5 sectors in West Sussex, though not in the South East or England due to the presence of Gatwick Airport in Crawley.

Sector strengths and weaknesses (location quotients)

It is useful to understand local economic strengths by comparing the distribution of employment by sector in local authority areas with the national distribution. This is performed by using Location Quotients (LQ). Any LQ above 1.0 shows a local concentration and any below 1.0 shows an under representation.

LQ/Sector	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing	West Sussex	South East
A, B, D & E : Primary and Utilities	0.6	0.4	0.3	0.8	0.6	0.5	1.9	0.8	1.3
C : Manufacturing	1.6	1.0	1.2	0.9	0.9	0.8	1.0	1.0	1.0
F : Construction	1.4	1.1	0.9	0.6	1.3	1.1	0.7	1.0	1.0
G : Wholesale and retail trade	1.2	1.2	1.0	0.9	1.3	1.3	1.1	1.1	0.9
H : Transportation and storage	0.4	0.8	0.5	4.6	0.6	0.6	0.5	1.6	0.6
I : Accommodation and food service activities	0.8	1.5	1.3	1.1	0.8	0.9	0.7	1.1	0.9
J : Information and communication	1.3	0.5	0.7	0.8	1.5	1.0	0.7	0.8	1.2
K : Financial and insurance activities	0.8	0.3	0.6	0.9	0.8	1.6	1.2	0.9	1.1
L : Real estate activities	0.6	1.1	2.8	0.3	1.8	1.4	1.4	1.4	0.7
M : Professional, scientific and technical activities	1.1	0.5	0.7	0.6	1.0	0.9	0.6	0.7	1.4
N : Administrative and support service activities	0.8	1.1	0.8	1.9	1.0	0.7	0.8	1.1	0.9
O : Public administration and defence; compulsory social security	0.7	0.8	1.6	0.7	0.4	0.4	1.1	0.8	1.3
P : Education	1.1	0.9	1.1	0.5	1.1	1.2	0.8	0.9	1.1
Q : Human health and social work activities	0.8	1.2	1.1	0.3	0.7	1.1	1.9	0.9	1.1
R S T U: Arts, entertainment, recreation and other services	1.2	1.1	1.3	0.4	1.3	1.2	0.9	1.0	1.0

As can be seen from the above table, Horsham has local concentration in many sectors, including construction, wholesale and retail, information and communication and real estate. Real estate has the highest LQ of 1.8 but it is worth noting that real estate takes up only 3% of the employee jobs in Horsham. Horsham has under representation in the most of the other industries, including public administration and defence, transportation and storage and human health and social work. Professional, scientific and technical activities and administrative and support service activities remain on a par with the national average.



The two key sector strengths in Horsham from the analysis are the information and communication sector and the professional, scientific and technical sector, in particular computer programming and consultancy. This, along with their total number of employee jobs, can be seen on the packed circles diagram on the left.