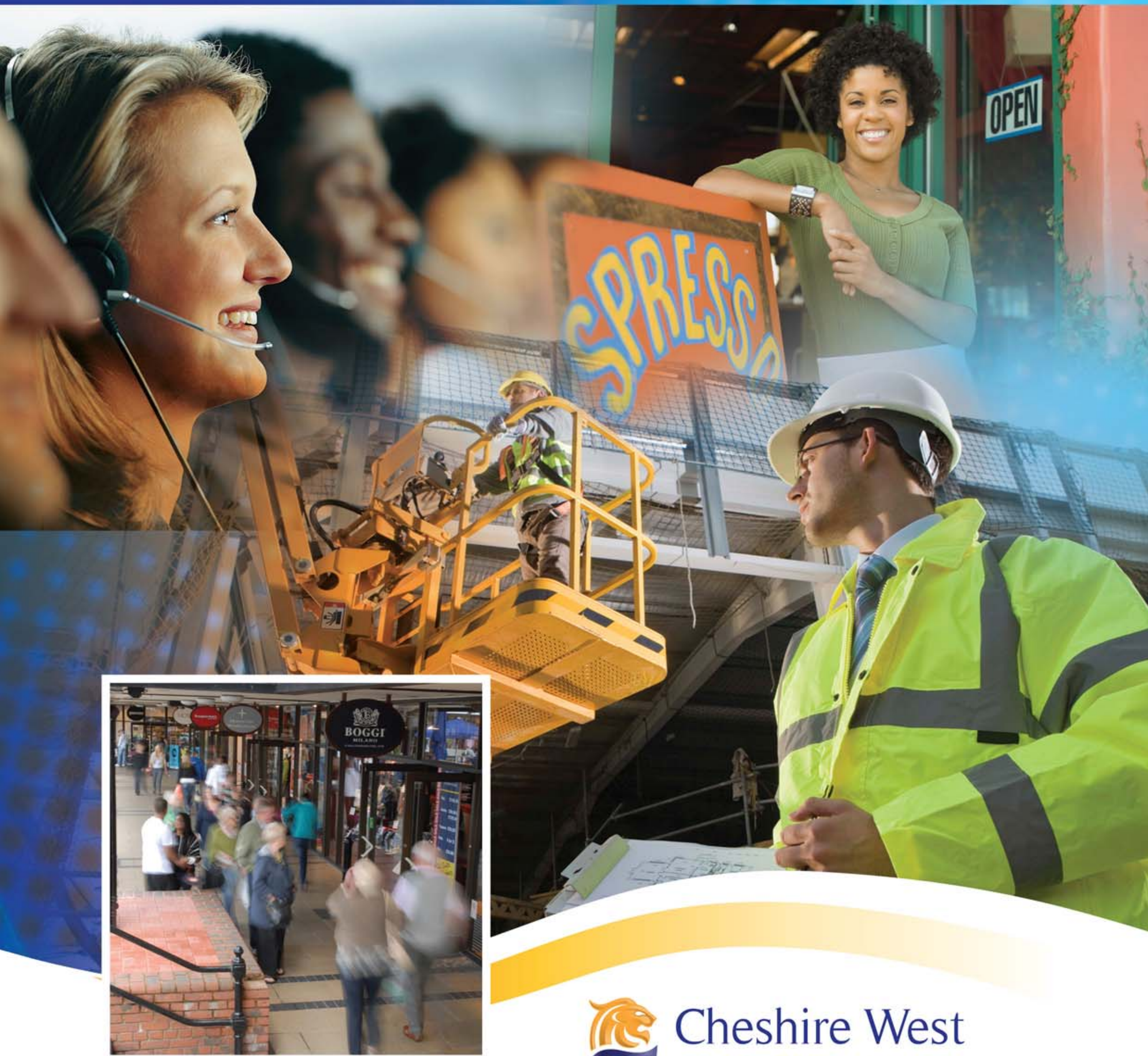
Cheshire West & Chester Council

Local Economic Assessment
Story of Place

February 2011



Cheshire West and Chester

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Section 1

Introduction

1.1 Section 69 of the Local Democracy, Economic Development and Construction (LDEC) Act (2009) made provision for a new local authority economic assessment duty. This requires all county councils and unitary district councils to prepare an assessment of the economic conditions of their area.

1.2 The purpose of the Local Economic Assessment is to provide an evidence base which informs the future strategies and policies of the Local Authority. The final document has been described as the 'Story of Place' but this story is based on the careful analysis of the available statistical economic evidence for the area.

1.3 This document, prepared for Cheshire West and Chester Council is the 'Story of Place'. It uses all the statistical data available and then provides a summary of the current and future position of Cheshire West and Chester by identifying the key aspects of the economic evidence. The full set of data used in compiling this report is set out in a more comprehensive statistical annex. The annex also sets out a full table of the sources.

1.4 The 'Story of Place' relies upon historic data much of which was collated prior to the formation of CWAC. As a result, the report unavoidably continues to reference the former local authority areas of Chester; Ellesmere Port & Neston; and Vale Royal.

1.5 During the completion of the report a suggested economic geography for CWAC was developed which was defined by Lower Level Super Output Areas (LSOAs) grouped into definitions:

- Chester
- Ellesmere Port
- Chester and Ellesmere Port hinterland
- Parkgate & Neston
- Helsby & Frodsham
- Rural corridor
- Weaver Towns
- Weaver Valley

Introduction *cont.*

1.6 The LSOA based definition will be a useful approach to an understanding of CWAC in the future. The geographic scale and diversity of CWAC prevents a meaningful Authority wide judgement being used for many economic measurements but at present much of the data which can be analysed at an LSOA level is only available from the 2001 Census which is now increasingly out of date.

1.7 One issue which will be important for CWAC in the future is that mid-census analysis at a small geographic level will be impossible but the lowest published geography for most annual ONS survey data will be the Authority level.

1.8 In order to make an informed judgment about the economy of Cheshire West and Chester, this document uses time series and geographic comparators. Where available and relevant the geographic comparators are:

- National
- North West England
- Cheshire East and Warrington

1.9 In addition we have used four comparator Unitary Authorities from the DCLG family of Local Authorities considered similar to Cheshire West and Chester. The Authorities selected were:

- Swindon
- East Riding of Yorkshire
- Northumberland
- Shropshire

1.10 The findings of the assessment are set out in five main sections:

- Business and Enterprise
- People and Communities
- Sustainable Economic Growth
- Economic Geography
- Local Profiles

Introduction *cont.*

1.11 The Local Economic Assessment Appendix contains the data which has informed the ‘Story of Place’. A significant amount of the data supporting the Local Economic Assessment is based on the existing census data from 2001 which ONS (Office for National Statistics) then extrapolates by carrying out annual surveys in various topic areas. The 2001 census data is now increasingly out of date and there is a limit to the accuracy of the surveys completed by the ONS. The results of the 2011 Census should be ready in time for a review and update of the Local Economic Assessment in 2013.

1.12 Whilst it is intended that the evidence contained in the statistical annex is regularly updated, there is no requirement to update the ’Story of Place’ on an annual basis since it is unlikely that many of the trends identified in the document will change over the course of a single year. It is therefore recommended that the ‘Story of Place’ is revisited after the 2011 Census when there will be a significant change in available data.

Section 2

Executive Summary

Introduction

2.1 This document sets out the 'Story of Place' for Cheshire West and Chester (CWAC) and is intended as an economic profile which can inform future work to be carried out by CWAC.

2.2 Whilst the document tells the 'story' from a whole Authority perspective, it should be recognised that in fact CWAC is not really a single economic geography and for many economic measures aggregating economic data at an Authority level can be misleading. Throughout this document, the previous Local Authorities of Chester; Ellesmere Port & Neston; and Vale Royal are used to present data partly because this allows a greater level of geographic granularity but also because large amounts of recent ONS data is available on this basis.

2.3 CWAC has now defined smaller geographic areas for economic analysis and programme work. These areas are the City of Chester; Ellesmere Port; Chester and Ellesmere Port hinterland; Neston & Parkgate; Helsby & Frodsham; rural corridor; Weaver Towns; and Weaver Valley. These geographic areas, defined by Lower Level Super Output Areas (LSOAs) will be extremely useful when 2011 census data is released and more up-to-date and relevant economic profiles can be prepared. These LSOA defined geographic areas will remain problematic as a basis for economic analysis between census years.

Economic Geography

2.4 CWAC as an Authority does not cover a single economic geography. Nor should CWAC be considered as at a centre of an economic geography. In economic and geographic terms, the Authority lies between the urban centres of Manchester and Liverpool and the boundary of the spheres of influence of these economic centres runs through the CWAC area. The view that CWAC is not at the centre of its own economic geography is supported by the fact that residents across CWAC can, on average, earn more by out-commuting than by working within the Authority.

Executive Summary *cont.*

2.5 Chester and Ellesmere Port can be considered to be within the economic sphere of influence of Merseyside and Liverpool. Out-commuters from Chester and Ellesmere Port will tend to gain employment to their north and west. The former Local Authority area of Vale Royal, however, is within the economic influence of Warrington, Cheshire East and Manchester with commuters heading to all these locations for employment.

2.6 In labour market terms there is very little linkage between the east and west of the Authority.

2.7 There is economic pressure for residents to seek employment outside CWAC as CWAC is not a high wage Authority. Average earnings tend to be higher in not only Liverpool and Manchester but also in Flintshire, Halton and Warrington than those found in CWAC with the exception of the former Local Authority area of Ellesmere Port and Neston. Wages in the former Local Authority area of Ellesmere Port and Neston are high even when considered on a regional basis[1].

2.8 In fact despite the economic pressure, there is not widespread out-commuting across CWAC. Despite being a relatively low wage economy, the scale of employment opportunities within Chester draws in a large number of commuters. These commuters generally arrive from Flintshire, Wirral and Ellesmere Port.

2.9 The former Local Authority areas of Vale Royal and Ellesmere Port & Neston are areas which suffer net out-commuting – notably the former Local Authority area of Vale Royal. Detailed commuter patterns date back to the 2001 Census and employment patterns have changed significantly since 2001 but declining employment in Ellesmere Port and the market towns of Helsby & Frodsham and Parkgate & Neston suggest that these are areas of CWAC which may increasingly be seen as dormitory towns.

2.10 In terms of economic geography, the overall impression is of an area which is regarded as an attractive residential location but residents are increasingly likely to out-commute to earn higher wages. At a macro level, the nature of the economy within CWAC is increasingly insufficient in providing the type of employment required to support buying a house in the area.

[1] ONS Annual Survey of Hours & Earnings, 2009

Executive Summary *cont.*

Business and Enterprise

2.11 At a superficial level the economy of CWAC has performed reasonably strongly over the last decade and GVA per head for Cheshire[2] remains above the national average. In evaluating performance, however, it is vitally important that analysis of economic strength is distinct from the characteristics of the resident population.

2.12 Despite the growth of the UK economy during the last decade, employment in CWAC in 2008 was marginally below the level recorded in 2003. The area recorded more than 2,000 fewer private sector jobs in 2008 compared to 2002[3].

2.13 GVA growth in Cheshire as a whole (GVA data is only published at a NUTS3 geographic level) increased and GVA per capita remains above the average for the UK, but if current growth rates continue, GVA per capita in Cheshire will be out-stripped by the UK average during the next decade.

2.14 The economic mix of the CWAC area is extremely diverse. The former local authority area of Chester is an economy in which employment is almost entirely reliant on the service sector; Chester has a lower proportion of manufacturing employment than Kensington and Chelsea. The former local authority area of Ellesmere Port retains strengths in manufacturing even though half of its manufacturing employment has been lost over the last decade.

2.15 The strongest employment growth in CWAC during the last five years has been recorded in the Weaver Towns and the Weaver Valley. This growth has been focused on service sector employment.

2.16 The sectors with a particular strength in CWAC are split between manufacturing and the service sector. Chemicals manufacturing continues to be an important source of employment especially when compared to the average employment levels for this sector across the remainder of England. This is also true for oil-refining, motor manufacture and paper manufacturing although in each of these cases the employment concentration relates to specific plants in Ellesmere Port rather than more general sector strength.

[2] ONS Nuts3, Regional GVA, 2007 (points 2.11 and 2.13)
[3] Annual Business Survey, 2008 (points 2.12, 2.14 - 2.18)

Executive Summary *cont.*

2.17 Strengths in the service sector are centred on the strength of banking in particular and financial services more generally. There is some concern that Chester has an over reliance on financial services but if this is the case, Chester is not alone. CWAC as a whole is ranked 16th in the UK in terms of concentration in financial services. There must be a presumption however that this employment is frequently relatively low skilled given the average wage levels in Chester where the concentration of financial services employment is at its highest.

2.18 Outside of financial services, other business services, real estate services, R&D activities and niches such as veterinary services employ an unusually high proportion of people.

2.19 Overall the growth in businesses continues and the rate of VAT registrations in CWAC is ahead of the national average[4]. Nevertheless, business registrations per head of population signalling the general level of entrepreneurialism are less than the rate for England as a whole. In terms of future private sector employment growth, the high value sectors often identified as those most likely to generate future employment growth such as pharmaceuticals, medical devices, energy, software, communications, media and creative industries, and other IT services are relatively poorly represented within CWAC.

People and Communities

2.20 The key long term economic issue for CWAC is likely to be its ageing population and slow population growth.

2.21 The population has grown more slowly over the last decade than the national average, mainly as a result of not attracting international migrants[5]. The result is a population which is now ageing more quickly than the national average and a dynamic which is likely to lock in future low levels of population growth.

2.22 With an anticipated reduction in household size[6] as a result of demographic and social trends, if housing numbers stay the same or increase gradually, the population can be expected to decline.

[4] ONS VAT Registration, 2007
[5] ONS Mid-Year Population Estimates and Local Area Migration Estimates, 2009
[6] CLG Live Tables, 2010

Executive Summary *cont.*

2.23 Even with a stable population, as increasing numbers of residents reach retirement age there will be implications for total disposable income, retail and service sector vitality, the nature of the leisure provision demanded and the level of support services required. This shifting demographic will have wide ranging financial, resourcing, economic and spatial implications for the Authority.

2.24 At present at a CWAC level, however, the population has high levels of economic activity, strong skills and is relatively likely to be employed in managerial and professional employment[7]. Although there is not a uniform distribution of a strong labour market and there are some areas of deprivation scattered across CWAC, in general the labour market works very well. Where there is unemployment, the age profile of those affected, the duration of unemployment; and the level of vacancy rates compare favourably to national averages.

2.25 The population is also, in general well supported by the local education system. GCSE results and A level results exceed national averages[8] although schools in the former local authority of Ellesmere Port and Neston appear to perform less well than those elsewhere across the area. It is also important to note that one area of Winsford has a nationally significant and somewhat anomalous education blackspot which is rated the 37th worst Lower Super Output area (LSOA) in the whole of England (out of 32,482) under the indices of deprivation[9] for access to education.

2.26 Within the overall picture of a well paid resident population benefiting from a strong labour market, there are areas of severe deprivation. In limited areas within Chester (Blacon Lodge and Lache Park) and Winsford Over record some measures of deprivation which are within the worst 1% in England.

[7] ONS Annual Population Survey, 2010
[8] Department for Education, Performance Tables, 2009
[9] Indices of Multiple Deprivation, 2007 (points 2.25 – 2.26)

Executive Summary *cont.*

Sustainable Economic Growth

2.27 By North West standards, CWAC is an area where house prices are high and when compared to income levels[10] are relatively unaffordable. Given that workplace earnings are not particularly high compared to neighbouring authorities; it is likely that average house prices are being maintained by commuters who value the living environment and perhaps the education opportunities within the area.

2.28 Furthermore, housing completions in recent years appear low when compared to neighbouring authorities and housing waiting lists are high.

2.29 The distribution of employment opportunities across CWAC does lead to a high proportion of car use for commuter journeys across the area[11]. There appears to be a low level of public transport use in some communities and there is a strong correlation between public transport use and those areas where deprivation is highest.

2.30 Partly influenced by the use of private cars, and perhaps influenced by the scale of the economy and concentration of industry in Ellesmere Port, the area has a poor record in CO_2 emissions[12].

[10] DCLG Live Tables, 2010 (points 2.27-2.28)
[11] 2001 Census
[12] Neighbourhood Statistics/DECC, 2008

Section 3

Cheshire West & Chester SWOT

Strengths	Weaknesses
▪ The City of Chester and Cheshire have a recognised brand. ▪ The area has become a sought after residential location. ▪ National and international transport connections are generally strong (although not universally). ▪ The economy remains a base for some highly visible and large employers. ▪ The skills of residents are significantly higher than the national average. ▪ The average level of occupation in which residents are employed is significantly higher than the national average. ▪ On the whole the labour market works well with key indicators at a CWAC level better than the national average.	▪ CWAC is not at the centre of its economic geography with Liverpool and Manchester the important hubs. ▪ CWAC does not represent a single economic geography with the watershed between the Liverpool and Manchester city regions running through the Authority. ▪ The number of people employed in the area has declined since 2003. ▪ There is a reliance on a small number of industries. ▪ In some areas there is a reliance on some significant employers. ▪ Sectors generally attributed with generating future growth (software, telecoms, media, pharma, medical, energy) are poorly represented. ▪ Wages are relatively low and house prices are high. ▪ Despite the image of affluence there are some very deprived communities.
Opportunities	**Threats**
▪ The skills, senior employment experience and accumulated wealth offer a significant resource which is currently working outside the local economy. ▪ The area has a significant strength as a location for a variety of service sector activities. ▪ The area has some less obvious strengths in areas such as science, technology and R&D as well as niche activities such as veterinary services. ▪ Chester remains an important focus of employment with significant in-commuting as well as providing a service centre location for a catchment area into North Wales. ▪ The brand of Chester and transport links are likely to generate continued investment interest.	▪ The population is ageing faster than the average for the UK and will start to erode economic activity levels and wealth generated. ▪ The ageing population and low levels of migration are expected to limit population growth. ▪ Declining household size will result in a declining population without significant new house building programmes. ▪ Higher paid residents are increasingly seeking employment opportunities outside the Authority (Liverpool, Manchester and Warrington). ▪ Declining employment in the market towns may diminish their vibrancy and create dormitory status. ▪ Parts of CWAC remain susceptible to continued declines in manufacturing. ▪ Employment growth is most prevalent in some of the least sustainable parts of the Authority from a transport perspective.

Section 4

Business and Enterprise

This chapter contains information on the following:

- Structure of the Local Economy
- Enterprise and Innovation
- Business Wealth and GVA Growth

Key Summary

4.1 The main focus of economic activity for CWAC is Chester which has 44% of total business stock and 46% of employment[13] (former local authority district of Chester). With the majority of economic activity taking place outside the only city within CWAC, however, Ellesmere Port, the Weaver Valley, market towns and the rural area play an important role in the CWAC economy.

4.2 Chester should not necessarily be seen as the focal point of the CWAC economy. Commuter patterns[14] show very little connectivity with the former local authority area of Vale Royal which interacts to a greater extent with Manchester, Warrington and Cheshire East. The former local authority areas of Chester and Ellesmere Port & Neston have closer interaction and together they both supply labour and draw commuters from North Wales and Merseyside.

4.3 Whilst Chester & Ellesmere Port have similarities in their labour market influence, the structure of their economies in terms of sector strengths could hardly be more different. The former local authority area of Chester has a lower proportion of manufacturing employment than Kensington & Chelsea whilst the former local authority area of Ellesmere Port retains

[13] Annual Business Survey, 2008 (4.1, 4.3-4.6)
[14] Annual Population Survey, 2008

Business and Enterprise *cont.*

strengths in manufacturing even though half its manufacturing employment has been lost over the last decade.

4.4 In terms of similarities in the structure of employment, the former local authority of Vale Royal has similarities to Chester. Certainly both these areas within CWAC have a high proportion of employees in the service sector with financial services an important contributor to this employment. There is some concern that Chester has an over-reliance on financial services but if this is the case, Chester is not alone. The local authority of CWAC is only ranked 16th in the UK in terms of employment concentration for that particular sector.

4.5 The key sector strengths for CWAC however do include financial services (particularly banking) as well as information services; automotive manufacturing; chemicals; paper manufacturing; and oil refining. Of course a large number of these relative strengths relate directly to large scale manufacturing plants in Ellesmere Port and the apparent strengths say as much about the decline in these sectors elsewhere rather than their particular strengths in CWAC.

4.6 Knowledge based economies also have a strength in CWAC with strengths in technical and engineering services, scientific research and other professional and scientific activities. Perhaps surprisingly however, the sectors which do not have a particular strength in CWAC are: IT, telecoms, software and digital and creative media. These have been identified as important sectors for the future of the UK economy.

4.7 The economy of CWAC has grown over the last ten years. VAT registrations are ahead of the national average and employment levels have increased[15]. As a percentage of the population, however, CWAC has a lower than average rate of VAT registrations compared to the average rate of VAT registrations for England and Cheshire East. In many ways, however, growth is relative. The proportionate lack of ‘new economy’ sectors; the lower level of entrepreneurialism and self employment than the UK; and above all the fact that Gross Value Added (GVA) growth across the former Cheshire County Council (lowest level of disaggregation) has been outstripped by the UK[16], the North West, and other neighbouring areas including Merseyside suggest relative decline. If current GVA trends continue, average GVA per head in Cheshire will fall below the UK average in the decade to come.

[15] ONS VAT Registrations, 2007
[16] ONS Nuts3 GVA, 2007

Business and Enterprise *cont.*

Structure of the Local Economy

Workplace Analysis

4.8 In 2008 there were 13,549 businesses recorded in CWAC[17]. These businesses were unevenly distributed across the CWAC area with 5,946 (44%) of businesses located in the former local authority area of Chester; 5,155 (38%) located in the former local authority of Vale Royal; and 2,448 (18%) located in the former local authority of Ellesmere Port & Neston. These figures equate to 5 businesses for every 100 people in the former local authority area of Chester; 4 per hundred in the former local authority area of Vale Royal; and 3 per hundred in the former local authority area of Ellesmere Port & Neston[18].

4.9 The sector with the highest number of recorded businesses in CWAC is ‘banking, finance and insurance’. In 2008 this sector made up 36% of the businesses in the area. When this proportion is added to the 28% of businesses recorded in the second most represented sector of ‘distribution, hotels and restaurants’, it can be seen that 64% of businesses are in just two sectors. This is a relatively high concentration of activity but it does generally mirror the national position.

4.10 The concentration of activity on ‘banking, finance and insurance’ (35.9%) and ‘distribution, hotels and restaurants’ (28.4%) is particularly strong in the former local authority area of Chester. Two thirds of businesses fall into this category in this area. The high proportion of businesses involved in banking, finance and insurance is not just restricted to Chester. A similarly high proportion (36.3%) is located in the former local authority area of Vale Royal.

4.11 The number of firms involved in manufacturing in the CWAC area is low. Overall, manufacturing represented just 5% of all firms across CWAC in 2008 compared to a national average of 6.4% and a regional average of 6.7%. The figure is particularly low in the former local authority area of Chester (4%) and even in the former local authority area of Ellesmere Port & Neston where manufacturing remains comparatively stronger, the proportion of 6.7% only matches the regional average. Perhaps surprisingly, across CWAC the proportion of firms involved in manufacturing is lower than that recorded in Cheshire East.

[17] Annual Business Inquiry 2009 (points 4.1 – 4.28)
[18] Annual Business Inquiry 2009 compared to mid-year ONS population estimates

Business and Enterprise *cont.*

4.12 The distribution of sectors across CWAC has not remained static for the last decade. The low proportions of companies involved in manufacturing and the high proportion involved in ‘banking, finance and insurance’ are partly as a result, respectively, of recent declines (-11% manufacturing) and increases (+62%) in the numbers of firms during the period 1998-2008. Growth was also recorded in construction (25%) and ‘public administration, education and health’ (19%) but in fact these increases were below the average for England.

4.13 The highest concentration of businesses in CWAC is located in the ‘City & St. Anne’s’ ward (former local authority of Chester). One in ten CWAC businesses are located in this single ward. The next highest concentration is recorded in ‘Northwich Witton’ (4.3%) with no other ward recording more than 3% of workplaces. In Ellesmere Port, the combined wards of ‘Westminster’ and ‘Stanlow & Wolverham’ are the base for 5.3% of CWAC businesses. Nevertheless, CWAC has a wide dispersal of workplaces across its geographic area.

4.14 The distribution of workplaces across size bands is slightly unusual in the CWAC area. In 2008, there were fewer micro businesses (employing < 10 employees) than the average for England but also fewer large workplaces (employing >200 employees). This trend towards mid range companies is most marked in the former Ellesmere Port area where 19% of businesses employ 11-200 people. The comparator percentage in England is 13%. This subject is explored further when entrepreneurial activity is considered.

Employees Analysis

4.15 The characteristics of workplaces must be considered in conjunction with the findings for employment. The Annual Business Inquiry recorded 150,664 employees within the CWAC area in 2008 and this represented an 8% increase on the previous ten years. The former local authority of Chester accounts for 46% of employment within CWAC, with the former local authority Ellesmere Port & Neston accounting for 21% and the remaining 33% located in the former local authority of Vale Royal

4.16 In terms of the concentration of employment, in 2008 the sectors which accounted for 64% of the businesses (‘banking, finance and insurance’ and ‘distribution, hotels and restaurants’) accounted for only 50.3% of employment. In fact when employment is considered, ‘public

Business and Enterprise *cont.*

administration, education and health' is the second most important sector (after 'distribution, hotels and restaurants') and represents 24.2% of employment.

4.17 The concentration of employment in the three main sectors of 'banking, finance and insurance'; 'distribution, hotels and restaurants'; and 'public administration, education and health' is not unusual when compared to comparator locations. These 3 broad sectors accounted for 73% of employment in England in 2008 and account for 74% of employment in CWAC.

4.18 Within employment concentrations by sector, however, some important changes took place in the period 1998-2008. The speed of growth in employment in 'public administration, education and health' (41%) significantly outstripped the average for England (25%). Employment growth in 'banking, finance and insurance' (18%) was significantly lower than that recorded for England (29%). Construction employment in CWAC declined (6%) against a national picture of 16% growth. Manufacturing employment also declined by 39% against an average decline for England as a whole of 33%.

4.19 The dynamics for CWAC as a whole do not illustrate the scale of the changes taking place at a lower geographic level. In the period 1998-2008 the former local authority area of Ellesmere Port & Neston suffered a 50% reduction in manufacturing employment but construction employment and employment in 'public administration, education and health' both increased by 42%. The former local authority areas of Vale Royal recorded a decline in construction employment of 39% which can be seen as a dramatic decline when compared to the national picture of a 16% increase.

4.20 The resultant structure of employment at a local level still shows the former local authority area of Ellesmere Port & Neston with a relatively high concentration of manufacturing employment (20%) but this is against a proportion of 39% of employees engaged in manufacturing in 1998. The level of employment in manufacturing in Chester is dramatically low. Manufacturing employment in Chester is just 3.5% - lower than the London Boroughs of Kensington & Chelsea and Hammersmith & Fulham. The former local authority of Vale Royal actually has a proportion of employees involved in manufacturing above the average for England.

Business and Enterprise *cont.*

4.21 At a local level the distribution of employment across sectors is least concentrated in the former local authority of Ellesmere Port & Neston, with the top two broad industry sectors (manufacturing and 'distribution, hotels and restaurants') accounting for 48% of employment. In the former local authority of Vale Royal the top two broad industry sectors ('distribution, hotels and restaurants' and 'public administration, education and health') account for 50% of employment and in the former local authority of Chester the top two broad industry sectors ('banking, finance and insurance' and 'public administration, education and health') account for 57% of all employees.

4.22 The spatial distribution of employment across CWAC using ward boundaries is more concentrated than the equivalent distribution of businesses. The largest employment areas are City & St Anne's ward (12%); Dodlesdon (6%) and College (5%) in Chester as well as Westminster in Ellesmere Port (6%). In 2008, nine out of 78 wards in CWAC accounted for 51% of employment.

Sector Analysis

4.23 Whilst the focus of the CWAC economy has shifted towards the service sector, it is useful to consider those specific sectors which have a strong and weak representation in the area. Location quotients can be used to examine the relative strength of employment in an area compared to the national average. A location quotient of 2 suggests that the sector employs double the number of employees than could be expected in an average location in England. Conversely a location quotient of 0.5 suggests half the concentration that could be expected.

4.24 For 2008, the CWAC area records location quotients of greater than 2 for forestry and logging; manufacture of coke and refined petroleum products; manufacture of chemicals and chemical products; manufacture of motor vehicles; information services activities; and financial services except insurance and pension funding.

4.25 Since economic areas cannot have relative strengths in large numbers of sectors, there are a considerable number of sectors where the location quotient is lower than 0.5. Some of those sectors which are often cited as generating economic growth but which have a low location

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quotient in CWAC are: manufacture of pharmaceuticals; all media sectors; telecoms; and software. The paucity of digital media type activities compared to the average English location is somewhat surprising.

4.26 Sectors which are considered important for growth and in which CWAC has a more typical location quotient include: food production; civil engineering; professional services[19]; ‘architectural and engineering activities, technical testing and analysis’; scientific research and development; and ‘other professional, scientific and technical activities’.

4.27 The pattern of sector activity therefore retains the stand out activities of motor manufacturing at Vauxhall, oil refining at Stanlow and chemical manufacture across the CWAC area. Outside of these sectors the economy now has strengths in a variety of professional service activities and in particular financial services. The economy is not particularly strong in IT, software or digital media.

4.28 To provide an understanding of localised sector strengths, 2008 location quotients of greater than 2 for the former local authority areas have been examined. These show that in the former local authority area of Chester the key sectors were; financial intermediation; and research & development. In the former local authority area of Ellesmere Port & Neston the key sectors were manufacturing of apparel; manufacture of paper; refining of petroleum; chemical manufacture; motor vehicle manufacture; water purification & sewage treatment; and renting of machinery. In the former local authority area of Vale Royal the key sectors were forestry and logging; mining and quarrying; food production; chemical manufacture; rubber and plastics manufacture; and manufacture of office machinery.

4.29 The key companies in CWAC partly reflect the sector strengths of the area but the wide ranging types of companies from CWAC listed in the Insider Top 500 North West Companies also demonstrate that, particularly in the service sector, previous sector strength is not a pre-requisite in attracting new companies or allowing existing companies to thrive. Five of the top 50 companies by turnover and profitability in the North West Insider list are based in CWAC

[19] In addition to ‘financial services activities except pensions and insurance’, CWAC has average location quotients for ‘activities auxiliary to financial services’, ‘real estate activities’, ‘legal and accounting activities’, activities of head offices and management consultancy’.

Business and Enterprise *cont.*

and these are Growhow (plant nutrients, Ince), Urenco (centrifuge plant and uranium enrichment, Capenhurst), Holidaybreak (travel company, Northwich), Ball Packaging (beverage packaging, Chester) and Innospec (chemicals, Ellesmere Port)[20].

4.30 In conclusion, whether in financial services in Chester or broader manufacturing in Ellesmere Port and the Weaver Towns, CWAC has some sectors which can be considered very important to the local economy. The Authority also has strengths in higher value activities such as scientific research, technical testing and analysis, professional services, architecture and civil engineering. There may be an opportunity to grow these activities. The wider Authority also records some strengths in food manufacturing which continues to be a growth sector for capital investment in the UK economy, whilst niche activities such as veterinary science are strong in the non-urban areas.

Enterprise and Innovation

4.31 In the period 1997-2007 the growth rate for VAT registered businesses in CWAC has been positive in every year and has outstripped the average for the North West in all but two years (1998 and 1999). In the five years recorded from 2003-2007 (most up to date records) growth in VAT registered businesses in CWAC outstripped the average for England[21].

4.32 Business birth rates have been increasing in CWAC. Between 1994 and 2007 business birth rates grew from 875 to 1190 new VAT registered businesses demonstrating an average annual increase over the period of 3% per annum. This growth, was faster than England and Cheshire East (each recording 2%). If births are compared as a percentage of total business stock, however, CWAC has recorded an average of annual births representing 10% of business stock in the period 1994-2007 which is fractionally behind the average for England of 10.29%.

4.33 There are variations across CWAC. The average growth rates for VAT registered businesses 1997-2007 in each of the former local authorities shows that the highest average level of growth in stock is recorded in the former local authority of Vale Royal (2.5%). Growth in the former local authority of Vale Royal is also consistent with growth of over 2% in each of the

[20] NW Business Insider top 500 NW business based on a combination of turnover and profit, 2010
[21] ONS VAT registration data, 2007

Business and Enterprise *cont.*

last eleven years. Performance in the former Ellesmere Port & Neston is more variable but in 2007 growth of 7% was achieved which is the highest growth rate recorded across the whole of CWAC over the period 1997-2007. The former local authority of Chester performs least well in the growth of VAT registered businesses with growth of 1.9%. Of the three former local authority areas Chester is the only area which recorded growth for the period below the average for England (2.1%) and in fact Chester recorded a net decline in VAT registered businesses in 1998 and 1999.

4.34 Under the ONS VAT sector classifications, more registered businesses in CWAC are in 'real estate, renting and business activities' than any other sector. In 2007 these business accounted for 36% of total stock. This was an increase on 2001 when these businesses whilst still the most important sector, represented 32% of stock.

4.35 By considering VAT businesses as a proportion of the population it is possible to infer information concerning levels of business start up and entrepreneurialism. At 3.29 VAT registered businesses per 100 residents the level of businesses in the CWAC area is below the average for England (3.4) and significantly lower than Cheshire East (4.3). Self employment levels are also relatively low in CWAC – representing 11% of employees in 2010 compared to 14% for England[22]. At 5%, self employment in the former local authority area of Ellesmere Port & Neston is particularly low.

4.36 Of businesses being established and registered for VAT in CWAC, their chance of survival outpaces the average for England.

Business Wealth & Gross Value Added (GVA) Growth

4.37 Gross Value Added (GVA) is published on a NUTS3 basis as the lowest level of geography. As a result GVA statistics are available for Cheshire County Council as a whole rather than allowing any separation into CWAC and Cheshire East. Cheshire County Council recorded a per capita GVA figure of £20,748 in 1997 and this was higher than both the North West region and England as a whole[23].

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[22] ONS annual population survey
[23] ONS NUTS3 Regional GVA, 2007

Business and Enterprise *cont.*

4.38 Whilst the average per capita GVA in Cheshire CC is higher than England as a whole, the growth in GVA is lagging behind England. Growth in the decade 1998-2007 recorded a rate of 52% in England and 43% in Cheshire CC. If this differential in growth continues, per capita GVA in Cheshire CC will fall below the average for England in the next decade.

4.39 In the period 1998-2007 GVA increased across each of the five broad sectors at which figures are produced at a NUTS3 level. Equally, however each of these sectors grew more slowly than the average for England. As a result the productivity gap for the former County area was across the board rather than focused on poor achievement in any particular area.

4.40 The higher income and economic activity figures for Cheshire East suggests that the economy of CWAC may be lagging further behind that of England than the overall GVA figures for the County suggest; CWAC is probably pulling down the average for Cheshire CC.

Section 5

People and Communities

This chapter contains information on the following:

- Demography
- Labour Market
- Economic and Social Exclusion
- Skills

Key Summary

5.1 A key issue for CWAC will be population growth and its link to the growth of the economy. The population has grown more slowly over the last decade than the national average, mainly as a result of not attracting international migrants[24]. The result is a population which is now ageing more quickly than the national average and a dynamic which is likely to lock in future low levels of population growth.

5.2 With an anticipated reduction in household size[25] as a result of demographic and social trends, if housing numbers stay the same or only increase gradually, the population can be expected to decline.

5.3 At present at a CWAC level, however, the population has high levels of economic activity, strong skills and is relatively likely to be employed in managerial and professional employment[26]. Although there is not a uniform distribution of a strong labour market and there are some areas of deprivation scattered across CWAC, in general the labour market

[24] ONS Mid-Year Population Estimates and ONS Local Area Migration Indicators, 2009
[25] CLG Live Tables, 2009
[26] Annual Population Survey, 2010

People and Communities *cont.*

works very well. Where there is unemployment, the age profile of those affected, the duration of unemployment; and the level of vacancy rates compare favourably to national averages.

.5.4 The population is also in general well supported by the local education system. GCSE results and A level results exceed national averages[27] although schools in the former local authority Ellesmere Port and Neston appear to perform less well than those elsewhere across the area. It is also important to note that one area of Winsford has a nationally significant and somewhat anomalous education blackspot which is rated the 37th worst lower super output area (LSOA) in the whole of England (out of 32,482) under the indices of deprivation for access to education.

5.5 In terms of commuting patterns[28], the labour market is complex. Whilst CWAC is marginally an in-commuting location, residents of the former local authorities Vale Royal and Chester earn more by travelling outside CWAC for employment – significantly more in the case of Chester. The conclusion is that Chester is not the focal economic point for CWAC and employment that supports the higher skills, professional grades and salaries that maintain the higher house prices is typically found in the urban areas outside the area. Salaries in CWAC workplaces are relatively low and in the case of the former local authorities of Chester and Ellesmere Port, many of these jobs are filled by commuters from North Wales and Wirral.

5.6 Within this general picture of a well paid resident population benefiting from a strong labour market, there are areas of severe deprivation. In limited areas within Chester (Blacon Lodge and Lache Park) and Winsford Over record some measures of deprivation which are within the worst 1% in England.

Demography

5.7 The population of CWAC in 2009 was estimated at 326,600 people.

5.8 Demographically, CWAC is relatively stable. Since 1999 the population in England has grown by almost 5%, both Warrington and Cheshire have grown by more than 3% and in some parts of the UK such as the comparator areas such as Swindon and the East Riding of Yorkshire the population has grown by 9%. CWAC has recorded more modest growth of 2% in the

[27] Department for Education, Performance Tables, 2009
[28] Annual Population Survey, 2010 (5.5 and 5.7)

People and Communities *cont.*

period from 1999 although this is in keeping with the North West region as a whole which has only recorded population growth of 1.5% over the same period.

5.9 The key drivers of population growth across CWAC are natural change (births outstripping deaths) and UK migration. Since 2004 internal UK migration has been the marginally more important factor for CWAC. This pattern of population growth, however, is in contrast to England as a whole where the largest contributor to population growth since 2004 has been international migration. In the period since 2004 CWAC has recorded net emigration[29].

5.10 The ethnic mix of the population within CWAC reflects a relative lack of international migration over the long term. CWAC has a very small population which is not 'white British'. While England as a whole which has a 'white British' population of 87%, CWAC records a 'white British' population of over 96%. The relative lack of ethnic diversity mirrors the picture in Warrington and Cheshire East.[30]

5.11 A further demographic contrast between England and CWAC is found in the ages of the population. The population in England is ageing - with the largest single age quintile in the population distribution found in the age quintile 40-44 - and CWAC is ageing at a faster rate. CWAC has a population profile which has a greater proportion of people than England in every age band from the age of 40 upwards. In England 48.8% of the population is over 40 whereas in CWAC 52.5% of the population is already over 40.[31]

5.12 In comparing the CWAC population age profile with that for England, it is also noticeable that whilst CWAC records a lower proportion of people in every age quintile below the age of 40, the disparity is greatest in the age bracket 20-35. Whether because of career choices, lifestyle choices or house prices (or a combination of these issues and others), CWAC has a relatively low proportion of its population in the younger working age groups.

5.13 The dynamic of an ageing population and no contribution made to population growth through international migration results in population growth forecasts for CWAC in 2010-2020 of 1.75%. These growth forecasts are lower than for the North West (3.6%), than for Cheshire East (5.25%), for Warrington (5.6%) and for England as a whole (7.36%).

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[29] ONS Local Migration Indicators, 2009
[30] ONS Census data 2001
[31] ONS mid-year population estimates and projections

People and Communities *cont.*

5.14 The very low level of projected population growth increases the magnitude of the potential problem created by the ageing population. By 2020 it is forecast that 54.5% of the population will be over 40 years of age and 22.3% will be over 65 years old.

5.15 The low level of population growth results in a smaller anticipated increase in households than elsewhere in England. Changing demographic trends (a greater number of households occupied by older people and older single people) as well as social trends (more single person households) does mean that despite relatively low population growth forecasts, the increase in households is still anticipated to be 20% between 2006-2026 (24% in England)[32]. The broad conclusion is that in order to achieve population growth of 1.75%, the CWAC area will still need to see an increase in total residential housing units in the Authority by circa 20%.

The Labour Market

Employment and Activity

5.16 On the whole, the labour market in CWAC performs strongly. Employment rates were 74% of the population 16-64 in 2009 and this compares favourably with England (71%) and the North West (68%)[33]. CWAC also out-performed Cheshire East (73%) in terms of employment rates for the first time since 2005.

5.17 Of those people employed, a relatively large proportion work full-time and a high proportion are employed in managerial or professional occupations. A proportion of 34% of the population are employed in these occupations and this is a higher proportion than England (30%), the North West (27%), or Cheshire East (33%). A slightly higher proportion is recorded in Warrington (36%).

5.18 The distribution of people in different categories of employment shifts across CWAC. In the ward of Parkgate, 45% of residents are employed in professional occupations and/or are senior managers. Ten miles away in Blacon Lodge 14% of residents are employed in these categories of employment with 23% involved in ‘elementary occupations’.

[32] CLG Live tables
[33] Annual Population Survey 2010 (points 5.16-5.18)

People and Communities *cont.*

5.19 In terms of types of activity carried out by the population, the section on Business & Enterprise has highlighted the continuing shift to the service sector. CWAC is no different to Great Britain with approximately 84% of those employed working in the service sector[34].

5.20 When unemployment is considered, CWAC has also performed more strongly than England as a whole. CWAC typically has a lower unemployment rate than England and in February 2010 the unemployment rate was 3.5% (compared to 4.1% in England). This reflected a 1.7 percentage point increase from the low point in February 2008. This increase was a lower increase than that recorded in England (2 percentage points)[35].

5.21 Job Seekers Allowance (JSA) claimant count in February 2010 was however higher than the 4.1% average for England in 23 wards across CWAC[36].

5.22 In comparison with the figures for Great Britain, unemployment in CWAC has not disproportionately affected any single age group compared to the national average. Across Great Britain as a whole 30% of those registered as unemployed were in the 18-24 age band, the same proportion as for CWAC.

5.23 Rates for' Young People not in Employment, Education or Training' (NEET)[37] are lower in Cheshire (as a whole) than England but there is some evidence that in September 2010 rates in Northwich (10.9%) and Winsford (10.9%) in particular exceed the national average (which has not exceeded 9% since 2007).

5.24 Those CWAC residents who are registered for JSA are also more likely to find employment more quickly than for Great Britain as a whole. In CWAC 11% of JSA claimants have been claiming for more than 1 year and this compares with 18% for Great Britain. Across the whole of CWAC there are few long term JSA claimants. Out of the nine worst performing wards in relation to claimant count, only the Northwich Witton ward recorded JSA claimants extending beyond 2 years.

5.25 Claimant per vacancy rates was also lower in CWAC (2.99) than in England (5.58) in February 2010 although CWAC was marginally less well placed for vacancies than Warrington and Cheshire East.

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[34] Annual Business Inquiry 2009
[35] ONS from Nomis 2010
[36] ONS Claimant Count 2010
[37] Connexions

People and Communities *cont.*

5.26 When all benefit claimants are considered, CWAC remains an authority area with a lower benefit claimant count than for Great Britain[38] although the difference is relatively small. In February 2010 the benefit claimant rate in CWAC was 13.9% compared to 15.1% in Great Britain.

5.27 There are some areas of CWAC with a high rate of benefit claimants. In all, 24 wards in CWAC have benefit claimant rates higher than the average for Great Britain (former local authority areas of Chester 7; Ellesmere Port & Neston 8; and Vale Royal 9) and rates in Westminster and Blacon Lodge are double the rates for Great Britain.

Commuting Patterns

5.28 Overall CWAC is an Authority area which recorded a small amount of net out-commuting at the last census (1%) but at a former local authority level this reflects out-commuting from the former local authority of Vale Royal (12%) and the former local authority area of Ellesmere Port & Neston (4%) and net in-commuting into the former local authority area of Chester (12% increase on resident population)[39].

5.29 It would be wrong to assume that Chester is simply the focal point for CWAC commuting. In fact commuting patterns are far more complicated and it can be argued that Chester is not the most important economic centre within the working age population of the area[40].

5.30 55% of those people working in the former local authority area of Chester live in CWAC. A further 22% travel from Flintshire, Wrexham and Denbighshire and 7% travel from Wirral. Chester is an important centre of economic activity for North Wales.

5.31 Chester is not however the most important economic centre in providing jobs for residents of the former local authority of Vale Royal. Vale Royal residents are most likely to live and work in the same area (56%) but are also more likely to travel to Cheshire East (13% of working residents); Manchester (5%); Warrington (5%); or Halton (5%) than travel to Chester. In fact as many Vale Royal residents commute to Liverpool (3%) as Chester (3%).

[38] DWP benefit claimants 2010
[39] ONS 2001 Census
[40] Annual Population Survey 2009 (5.29 – 5.35)

People and Communities *cont.*

5.32 Chester is also not the most important economic centre in providing jobs for residents of the former local authority of Ellesmere Port & Neston. Half of residents work within the same former boundary area and the remainder are as likely to work in Wirral as in Chester.

5.33 Chester residents seeking work are most likely to remain in Chester (56%) but where out commuting takes place Flintshire (8%); Wrexham (5%); Wirral (6%); Ellesmere Port & Neston (5%); Cheshire East (4%); and Warrington and Liverpool (both 3%) are all important. There are low flows of Chester residents working in the former local authority area of Vale Royal suggesting little economic inter-linkage between the two former local authority areas.

5.34 The workforce of the former local authority area of Ellesmere Port & Neston is drawn locally (60%) but also from a catchment area to the west made up of Wirral (14%); Chester (9%); Flintshire (5%) and Wrexham (2%) amongst others.

5.35 The workforce of the former local authority area of Vale Royal is also drawn locally (65%) but also from a catchment area to the east made up of Cheshire East (15%); Halton (3%); and Warrington (3%).

Earnings

5.36 Earnings of CWAC residents are, on average, higher than both the North West region and those of England. In 2009 average earnings of residents were £500 compared to £496 in England. The strong earning patterns for residents were not in general because of high wage employment opportunities within CWAC. Workplace earnings of £469 fall below the average for England and only a marginally above the regional average of £460[41].

5.37 Out-commuters are therefore likely to increase their salary prospects in CWAC as a whole and this is true for both the former local authority area of Vale Royal (where workplace earnings in 2009 were £446 and resident earnings were £473) and also Chester (where workplace earnings in 2009 were £455 against resident earnings of £500). In Ellesmere Port workers tend to earn more than the average for residents.

41 ONS Annual Survey of Hours and Earnings 2009

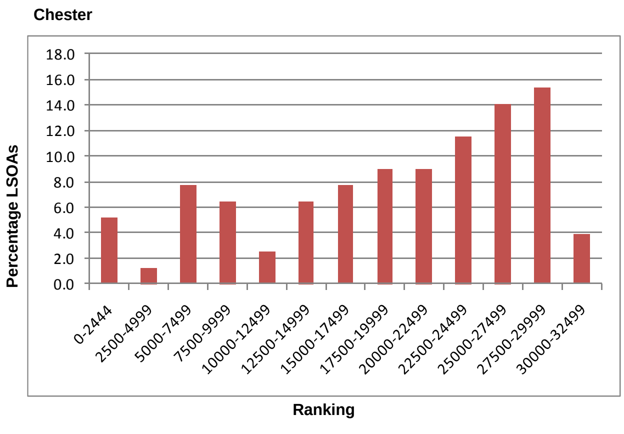
People and Communities *cont.*

5.38 The pattern of economic geography is therefore complex. The former local authority of Chester attracts net in-commuters notably from North Wales but opportunities are typically in lower wage employment. The higher earning Chester residents commute outside CWAC to increase their earnings potential. Ellesmere Port attracts workers from the West and its workplaces provide the highest paid job opportunities in CWAC whilst Vale Royal is an area with net out-commuting and has labour market linkages with authorities to its East.

5.39 Earnings growth for both residents and workplaces has not been particularly strong in CWAC in the period 2002-2009. Whilst figures for CWAC do not exist, growth in workplace earnings across each of the former local authorities did not keep pace with those for the region (or England) and growth in resident earnings only out-paced the region (and England) in the former local authority area of Ellesmere Port & Neston.

Economic and Social Exclusion

5.40 In terms of overall deprivation the following graphs show the distribution of rankings for the Indices of Multiple Deprivation (IMD) for the LSOAs in each of the former local authority areas in 2007. Every LSOA in England is ranked with 32,482 LSOAs making up the total[42].

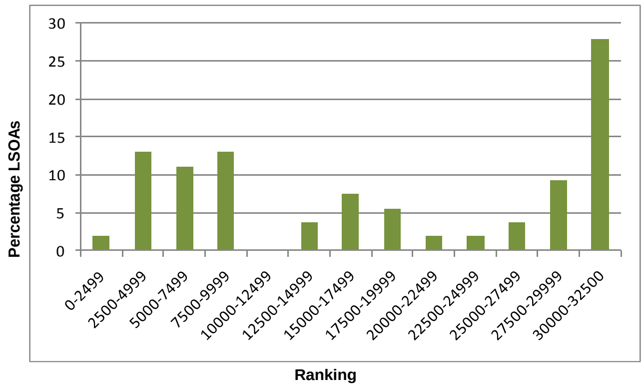


[42] CLG Indices of Multiple Deprivation, 2007

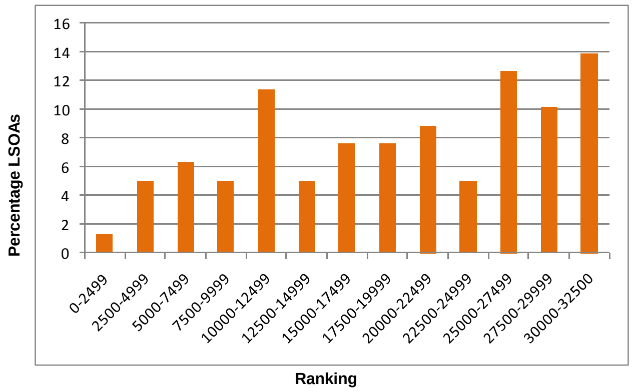
Mickledore
Solutions in regional development

People and Communities *cont.*

Ellesmere Port & Neston

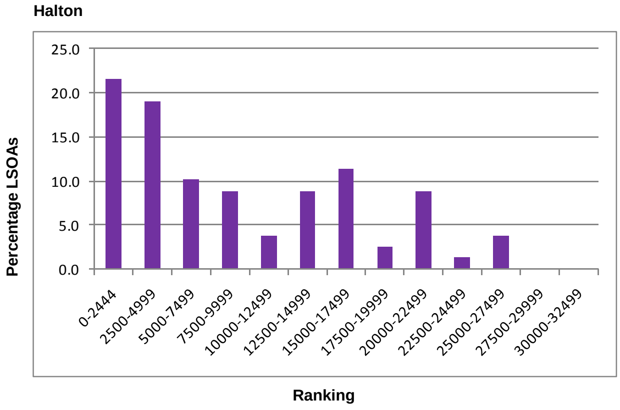


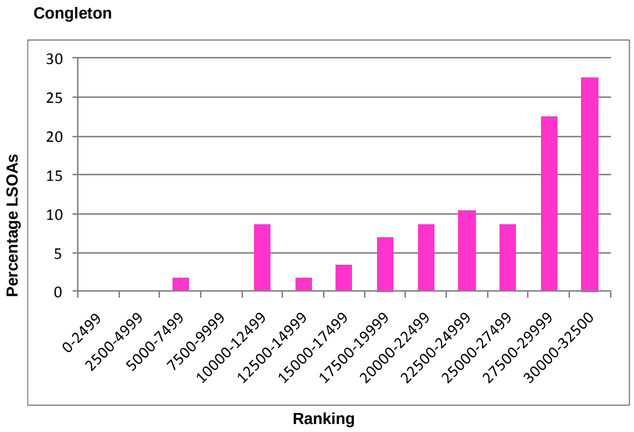
Vale Royal



5.41 By way of comparison, the following charts for Halton and Congleton are included which are calculated on the same basis.

People and Communities *cont.*





5.42 It can be seen from the charts that some authorities have results for the IMD that show a large skewing of their communities into lower rankings indicating high levels of deprivation (e.g. Halton) whereas other authorities where communities are skewed into the higher rankings indicating higher levels of affluence.

5.43 CWAC has a number of communities in the lower 7.5% band for England. Numerically most of these are found in the former local authority of Chester although they are also found in the former local authorities of Ellesmere Port & Neston and Vale Royal.

5.44 Each of the former local authority areas also has a number of LSOAs in the highest ranking category and therefore there is no case to suggest that deprivation is prevalent on an authority wide basis.

People and Communities *cont.*

5.45 The relatively small number of LSOAs in the most deprived 7.5% does not make the deprivation any less severe in these areas. In fact Chester has a LSOA in the bottom 1% in England for each of the measures of income (within the Lache Park ward), employment (within the Blacon Lodge ward) and health (within the Blacon Lodge ward) whilst Vale Royal (within Winsford Over ward) contains a LSOA which records exceptionally high levels of deprivation in terms of access to education (37th worst out of 32,482 in England).

Education and Skills

5.46 Against most comparator measures, CWAC has a highly skilled population. The rate of 31.7% of residents qualified to NVQ level 4 and above is higher than the North West (27%) and the national average (29.6%) although not as high as Cheshire East (36.1%)[43].

5.47 Conversely CWAC does not have a particularly low number of residents without any qualifications. The proportions of residents with no qualifications in CWAC (12.3%) are similar to the average for England (12.1%).

5.48 The reason for these diverging skills outcomes is linked to the geographic distribution of those skills. The proportion of residents in the former local authority of Chester with qualifications equivalent to NVQ4 and above is exceptionally high (39.6%) but the same pattern is not found in the former local authorities of Vale Royal (29.1%) or Ellesmere Port & Neston (23.8%). Both these former local authority areas record proportions of more than 14% of the population without any qualifications.

5.49 Not only does CWAC record high proportions of skilled residents across the population, but this is also supported by the education offer within CWAC. The average local authority scores for both GCSE attainment (five or more A*-C grade GCSEs including maths and English) and A Level attainment (average point score per pupil) exceed the average for England[44]. It is noticeable, however, that the schools within the former local authority of Ellesmere Port & Neston do not, in general, reach the same level of attainment for A Levels as elsewhere within CWAC. In 2009, Verdin High School in Winsford achieved the lowest A Level outcome in CWAC recording 292 points per pupil against the English average of 739.

[43] Annual Population Survey, 2010 (5.46 – 5.48)
[44] Department for Education Performance Tables, 2009

Section 6

Sustainable Economic Growth

This chapter includes information on the following:

- Land Use and Commercial and Industrial Floor Space
- Housing
- Transport Infrastructure
- The Environment

Key Summary

6.1 By North West standards, CWAC is an area where house prices are high[45] and when compared to income levels are relatively unaffordable. Given that workplace earnings are not particularly high compared to neighbouring authorities; it is likely that average house prices are being maintained by commuters who value the living environment and perhaps the education opportunities within the area.

6.2 Furthermore, housing completions in recent years appear low when compared to neighbouring authorities and housing waiting lists are high.

6.3 Of course housing stock varies according to area[46], but there is not a strong correlation between the character of housing stock and the levels of deprivation. Those areas with the highest levels of deprivation are not typified by any particular housing characteristic. Neighbourhoods in Ellesmere Port & Neston however do appear to be stratified between ownership tenure.

[45] DCLG Live Tables, 2010 (6.1-6.2)
[46] 2001 Census (6.3-6.4)

Sustainable Economic Growth *cont.*

6.4 The distribution of employment opportunities across CWAC does lead to a high proportion of car use for commuter journeys across the area. There appears to be a low level of public transport use in some communities and there is a strong correlation between public transport use and those areas where deprivation is highest.

6.5 Partly influenced by the use of private cars, and perhaps influenced by the scale of the economy and concentration of industry in Ellesmere Port, the area has a poor record in CO_2 emissions[47].

Land Use and commercial and industrial floor space

6.6 CWAC covers almost 100,000 hectares of land of which 85% is classified as green space. DCLG (Department for Communities and Local Government) estimates that there is 4.3m m^2 of commercial space across the authority and that this is split between retail, office, factory and warehousing. This is in similar proportions to England as a whole although the proportion of space taken by factories (42%) is reasonably high. Between 2005 and 2008 DCLG recorded an increase in every category of commercial space for CWAC – the increase in factory space recorded in CWAC during this time (increase of 4%) was not found in comparator locations. England as a whole recorded a 6% reduction in factory space during the period[48].

Housing

6.7 DCLG estimates that approximately 1.2% of land in CWAC is covered by domestic buildings and that this amounts to $11m^2$ of coverage. House prices in CWAC are relatively high. Average house prices outstrip those found in the region as a whole and are typically higher than those recorded in Cheshire East. The Land Registry House Price Index shows housing in CWAC tracking close to the UK average[49]. In January 2010 the average house price in CWAC was 94% of the UK average.

6.8 According to the Land Registry house prices in the UK peaked in Jan 2008. In the period from Jan 2000 UK average house prices rose by 131% and this was outstripped by growth in CWAC of 140%. Even at this rate of growth, house prices in CWAC did not grow at the same

[47] Neighbourhood Statistics/DECC, 2008
[48] DCLG / ONS Neighbourhood statistics
[49] Land registry House Price Index

Sustainable Economic Growth *cont.*

rate as the North West which recorded average price rises of 153% during the same period. Since Jan 2008 CWAC house prices have fallen 11% and a decline was recorded through both 2008 and 2009. This is in contrast to the UK where average house prices had started to recover by 2009.

6.9 House prices are notoriously difficult to measure on an average basis and DCLG records an upturn in house prices from January 2009 in England, the North West and in CWAC. Using DCLG data, even lower quartile houses were increasing in price again in 2010 and reached an average of £115,000. At this level, houses positioned in the lower quartile of prices were 6.57 times the average lower quartile salary. Using this as an indicator of affordability places CWAC as an 'unaffordable' location exceeding the same ratio in England (6.28); the region (5.02); and neighbouring Cheshire East (6.55). It should be noted that this places CWAC as only the 193rd least affordable authority in the country. As context, the ratio in Kensington and Chelsea is 19.57[50].

6.10 In keeping with the national picture and the trends in the North West, sales volumes fell year on year during 2007, 2008 and 2009. Housing completions have also been relatively low and have fallen from 2005/06. Even in 2005/06 completion levels were at 740 houses compared to Warrington and Cheshire East which both recorded completions of over 1,000 in this peak year.

6.11 The findings for housing waiting lists are consistent with relative levels of un-affordability and completions. It was estimated that there were 12.4% of households on housing waiting lists in the former local authority of Chester in 2009 compared to an average of 8.2% for England. The former local authority of Ellesmere Port & Neston was in line with the average for England whereas the level was lower in the former local authority area of Vale Royal (5.6%).

6.12 Tenure types vary across CWAC although the six wards with the highest proportion of private housing (owned or owned with a mortgage) are all found in the former local authority of Ellesmere Port & Neston (Strawberry Fields, Sutton Green and Manor, Groves, Riverside, Ledsham, and Whitby). In all six of these wards private ownership exceeds 93%[51]. These wards all have a high proportion of mortgaged properties, but Burton and Ness also in the

[50] DCLG Live tables (points 6.9 – 6.11)
[51] 2001 Census (6.12 – 6.14)

Sustainable Economic Growth *cont.*

former local authority area of Ellesmere Port & Neston has the highest number of outright ownership in CWAC with a rate of 51%[52].

6.13 When considered from the reverse perspective and an analysis is completed of housing which is in shared, council or social housing provider ownership, or is privately rented the highest proportions are also found in the former local authority of Ellesmere Port & Neston. Stanlow & Wolverham, Grange and Westminster wards all have over 60% of housing in this category.

6.14 When the wards demonstrating high indices of deprivation are considered, Blacon Lodge has 49% privately owned housing (5th lowest in CWAC), Winsford Over has 56% privately owned housing (8th lowest in CWAC) and Lache Park has 65% privately owned housing (17th lowest in CWAC). Housing tenure in CWAC does not tend to correlate strongly with deprivation levels.

6.15 Nor is type of housing a strong indicator of deprivation within CWAC. The housing type in the most deprived areas of Blacon Lodge (75% houses highest proportion terraced), Lache Park (87% housing highest proportion semi-detached) and Winsford Over (92% housing highest proportion detached) tend to be houses rather than flats, apartments or maisonettes.

Transport Infrastructure

6.16 The quality of transport infrastructure is generally a relative measure. By comparison with much of the UK, there is a reasonable provision of transport infrastructure in CWAC but this is focused mainly on the north of the area. Rail links to London, Manchester and Liverpool as well as some parts of North Wales are good. The M56/M53 motorway provides fast road access and CWAC has access to Manchester and Liverpool airports offering a range of international flights and connections to major hubs.

6.17 The existing road infrastructure has a tendency for high levels of congestion at peak times and there are a number of identified pinch points in the area notably in and around Chester

[52] ONS Census 2001

Sustainable Economic Growth *cont.*

and the Weaver Valley. In addition, there is some concern about the heavy expenditure increasingly required in repair work.

6.18 In common with many areas, the provision of a convenient public transport network to more rural area tends to be restricted to the main trunk routes and in the case of CWAC this is dominated by services to Chester.

Travel to work journeys

6.19 Perhaps unsurprisingly, the most common mode of transport to work across CWAC is by private car (64.4%) and CWAC residents are more likely to travel to work using their car than in England (58.4%), the North West (54.9%) or even in other county locations such as Shropshire (59%) and Northumberland (58.2%)[53].

6.20 If CWAC residents are not travelling to work in their car they are most likely to be working from home (9.2%), walking (8.7%) or travelling in somebody else's car (6.9%). At the time of the last census only 1 in 20 residents of CWAC used public transport.

6.21 Those residents most likely to work from home are in Shakerley, Northwich (23.6%), Tilston, Malpas (21.7%) and Seven Oaks & Marston, Antrobus (21%). The residents most likely to use their car for work live in Sutton Green & Manor (76%) followed by many of the more rural wards. Residents walking to work is most prevalent in the central wards of Chester (College ward 32%). Residents in CWAC most likely to use public transport live in Blacon Lodge (20%), followed by Blacon and Lache Park.

6.22 The location from where workers are most likely to drive to work is Dodleston, Chester (83%). Even in the centre of Chester more than 50% of workers typically drive to work. In City and St Anne's 54% of workers travel by car although 20% arrive by public transport.

6.23 Residents in CWAC do not typically travel an unusually long distance to work. In fact, residents of CWAC are more likely to live within 2km of work than the average for England or the region. If residents do not live within 2km of work, however, they are more likely to live

[53] ONS Census 2001 (6.19 -6.39)

Sustainable Economic Growth *cont.*

more than 20km from work than the average for England or the region. When workers rather than residents are considered, the distances travelled to work in CWAC are typically higher than the average for England or the region.

The Environment

6.24 The performance of CWAC against environmental measures is not strong although it does reflects the large area of the Authority, a relatively decentralised economy and the concentration of industry in Ellesmere Port. CO_2 emissions per head (at 9.3t) are above the average for the North West and for England as a whole. Emissions per head are also reducing more slowly than in the North West or England as a whole[54].

[54] Neighbourhood Statistics / DECC 2008

Section 7

Economic Geography

This chapter considers the economic geography and influences outside the CWAC boundary. This is considered from the perspective of:

- Labour market size
- Earnings
- Commuter patterns

Key Summary

7.1 In economic terms CWAC is not at the centre of its economic geography. The most important economic influences on the economies are the cities of Manchester, Liverpool and to a lesser extent Warrington.

7.2 The City of Chester, whilst an important centre of employment drawing people from Flintshire, elsewhere in CWAC and Wirral in particular, does not offer particularly high wages[55] and in fact on average the residents of the former local authority of Chester earn significantly higher wages by out-commuting.

7.3 In terms of the labour market, the East of CWAC (the former local authority area of Vale Royal) is distinct from the remainder of the Authority with relatively little cross commuting between the two parts of the Authority.

[55] ONS Annual Population Survey, 2009 (points 7.2 – 7.14)

Economic Geography *cont.*

Economic Geography

7.4 In economic terms CWAC lies between the cities of Liverpool and Manchester and these are the dominant economies in North West England. The CWAC boundary straddles the zones of influence of the two cities.

7.5 To the East of CWAC the former Vale Royal area is influenced by the economies of Warrington, Greater Manchester and Cheshire East. The remainder of CWAC however is more closely linked to North Wales and Merseyside.

7.6 CWAC is not at the centre of this economic geography. Across the Authority, on average residents earn more than those working in the area. Out-commuting residents therefore earn more than those remaining and within the North Wales to Greater Manchester corridor the highest earning locations are Liverpool, Manchester and Warrington. Importantly, however, the highest earnings for workers in this area are recorded in Ellesmere Port.

7.7 Despite the possibility of gaining higher earnings elsewhere, CWAC is not an area which records significant out-commuting although the pattern is not consistent across the Authority.

7.8 The former Local Authority area of Vale Royal could be classified as a dormitory location. With a daytime population of only 88% of the resident population, out-commuting is significant. Of those residents out-commuting, they are equally likely (5% of the workforce in each case) to travel to Halton, Warrington, Manchester or the former Local Authority area of Macclesfield. The remainder of CWAC is unlikely to attract the workforce from this area – just 3% travel to the former local authority of Chester.

7.9 The economic isolation of the former local authority area of Vale Royal from CWAC is further evidenced by commuter flows into the area. In commuters are likely to come from Cheshire East, Halton and Warrington. Few commuters (less than 1% of the workforce) travel from other areas within CWAC.

7.10 Whilst the former area of Vale Royal is a dormitory location, the reverse is true of Chester. Average wages in the former local authority of Chester are not significantly higher than neighbouring authorities – and they are lower than Flintshire, the former local authority area of Ellesmere Port & Neston and Halton. Despite this, the scale of employment available draws in

Economic Geography *cont.*

significant numbers of commuters. The former local authority area of Chester has a daytime population of 113% of the resident population.

7.11 As residents in the former local authority area of Vale Royal tend to travel north and west to work, so Chester draws in commuters from its west. Wrexham, Denbighshire and Wirral are all significant residential areas for workers in the former local authority area of Chester. The former local authority area of Ellesmere Port & Neston is also important. The most significant commuter location, however, providing 15% of the workforce for the former local authority area of Chester is Flintshire.

7.12 Residents of the former local authority area of Chester are able to earn higher wages in neighbouring labour markets. Of those out-commuting, residents are most likely to work in Flintshire but also travel to Wirral, the former local authority area of Ellesmere Port and Neston, Wrexham, Liverpool and Warrington. All these areas with the exception of Wirral offer higher average workplace earnings than the former local authority area of Chester.

7.13 The former local authority area of Ellesmere Port & Neston is more balanced in terms of commuting with a daytime population of 96% of the resident population. In addition, workplace earnings and resident earnings are more closely aligned.

7.14 Economic linkages between the former local authority area of Ellesmere Port and Neston are most closely tied with the former local authority area of Chester as well as Wirral and Flintshire. These three areas are the most important residential areas for those people in-commuting to the former local authority area of Ellesmere Port and Neston. Out-commuters are also most likely to travel in the reverse direction but Liverpool is also an important destination for out-commuters from the former local authority area of Ellesmere Port and Neston.

Section 8

Local Profiles

This chapter considers the limited amount of up-to-date economic data that is available at a lower level super output area to construct initial profiles for the economic areas of:

- City of Chester
- Ellesmere Port
- Chester & Ellesmere Port Hinterland
- Helsby & Frodsham
- Neston & Parkgate
- Rural corridor
- Weaver Towns
- Weaver Valley

Introduction

8.1 Amion Consulting worked with CWAC Council to develop interpretive geographies for CWAC which best reflected the economic characteristics of the different areas. The eight separate geographic areas which were developed are built up from Lower Level Super Output areas (LSOAs) which will allow a more detailed and consistent level of analysis in the future.

8.2 Census data is compiled using LSOA as geographic areas which can then be aggregated according to need. Data produced by the Office of National Statistics between census dates is based on survey data and sample sizes are not sufficiently large to allow data to be accurately compiled for such small geographic areas. As a result most of the data for these

Local Profiles *cont.*

new economic definitions will be based on the 2001 census until the results of the 2011 census are available.

8.3 Data which is available at a lower geographic level relates to employment, company records and benefit claimants.

City of Chester

8.4 The City of Chester employs 47,500 workers which represents 32% of the total employment within CWAC. Employment in Chester grew by 0.7% in the period 2003-2008[56].

8.5 The strongest growth in employment during the period 2003-2008 has been in 'financial services' and 'other services' which includes property services. By 2008 financial services within Chester City accounted for 24% of all employment. Conversely during the same period employment in manufacturing, 'distribution and hotels', 'transport and communications', and public services declined. The public sector remains the largest employer in the City with 32% of all employment.

8.6 When location quotients for the City are considered, the sectors employing the highest proportion compared to the proportion for England are: 'Libraries, archives, museums and culture' (3.4x); financial services (2.9x); security (2.6x); and 'scientific research and development' (2.5x).

8.7 At the time of the 2001 Census, Chester residents were more likely to be employed in a professional occupation (11%) than the average for England (8%) and were significantly more likely to hold a level 4/5 qualification (27%) compared to England (20%).

8.8 Despite some of its economic strengths, the City of Chester has two LSOAs within the most deprived 5% in England and no LSOAs within the most affluent 5% in England[57].

8.9 Residents claiming Job Seekers Allowance in the City of Chester rose by 83% in the period from December 2007 – December 2010 compared to the rate of increase for England of 76%[58].

[56] Annual Business Inquiry, 2008 (points 8.4 – 8.6)
[57] Indices of Multiple Deprivation, 2007
[58] ONS Claimant Count, 2010

Local Profiles *cont.*

Ellesmere Port

8.10 In 2008 there were almost 26,000 people employed in Ellesmere Port representing 17% of employment in CWAC[59]. Employment fell by 12% in Ellesmere Port during the period 2003-2008 representing a steep decline, especially given that this was a period of economic growth for the UK as a whole.

8.11 The sharpest decline in employment during the period was in manufacturing which declined by 37% during the five years. 'Distribution, hotels and restaurants' is now the sector that employs the highest number of people. Manufacturing accounts for 23% of employment in Ellesmere Port whilst 'distribution, hotels and restaurants' accounts for 27% of employment.

8.12 Employment fell in 'transport and communications' (19%) as well as 'distribution, hotels and restaurants' (4%) and public services (2%). Ellesmere Port also recorded no growth in 'other services' employment during the period which was unusual compared to the UK as a whole. The only significant employment sector recording growth in Ellesmere Port during the period was financial services (10%).

8.13 When location quotients for Ellesmere Port are considered, the sectors employing the highest proportion compared to the proportion for England are (perhaps unsurprisingly) refined petroleum products (103x), manufacture of motor vehicles (13x), manufacture of chemicals (9x), manufacture of paper (7x), and civil engineering (5x).

8.14 At the time of the last census, the manufacturing base of Ellesmere Port was reflected in the proportion of the population involved in process work and elementary occupations (23%) compared to the equivalent for England of 17%. Skill levels amongst residents were also lower than the average for England. Just 13% of residents held a level 4/5 qualification compared to 20% for England. At the time of the last census 32% of residents held no qualification (compared to 29% for England)

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[59] Annual Business Inquiry, 2008 (points 8.10 – 8.13)

Local Profiles *cont.*

8.15 Despite some of the economic difficulties faced by Ellesmere Port, the area only registered one LSOA within the most deprived 5% for England. No LSOAs in Ellesmere Port are within the most affluent 5% for England[60].

8.16 Residents claiming Job Seekers Allowance in Ellesmere Port rose by 72% in the period from Dec 2007 – Dec 2010 compared to the rate of increase for England of 76%.

Chester & Ellesmere Port Hinterland

8.17 In 2008 there were almost 18,000 people employed in the Chester and Ellesmere Port hinterland representing 12% of the employment of CWAC. Employment grew by a marginal 0.5% in the Chester and Ellesmere Port hinterland during the period 2003-2008.

8.18 The employment characteristics of this area are changing rapidly. In the period 2003-2008 employment in financial services rose by 21% and now accounts for 51% of employment in the area. This compares to 'distribution, hotels and restaurants' which showed a decline in employment of 29%. Sectors employing smaller proportions of employees also changed significantly. Those in decline included construction (down 21%); manufacturing (down 16%); and public administration (down 9%) but they were counter-balanced by increases in other services (141%) and 'transport and communications' (12%).

8.19 When location quotients for the Chester and Ellesmere Port hinterland are considered, the sectors employing the highest proportion compared to the proportion for England are Information services (17x), financial services (10x), services auxiliary to financial services (6x) and basic metal manufacturing (8x).

8.20 At the time of the last census the proportion of residents in the Chester and Ellesmere Port hinterland that were employed in senior managerial or professional occupations was significantly higher (26%) compared to England (19%) and this was also reflected in the figures for skills with 28% of residents having achieved a level 4/5 qualification compared to an average for England of 20%.

[60] Indices of Multiple Deprivation, 2007 (8.20 – 8.21)

Local Profiles *cont.*

8.21 When the 2007 Indices of Multiple Deprivation are examined for the Chester and Ellesmere Port hinterland, there are no LSOAs within the most deprived or the most affluent 5% of LSOAs in England.

8.22 Residents claiming Job Seekers Allowance in the Chester and Ellesmere Port hinterland rose by 112% in the period from Dec 2007 – Dec 2010 compared to the rate of increase for England of 76%. This dramatic increase should be seen in the context that there were only 212 recorded claimants for the area in December 2010[61].

Helsby & Frodsham

8.23 In 2008 there were 4,871 employees registered as working within the Helsby and Frodsham area. This represented 3% of employment in CWAC. Employment declined by 5% in the period 2003-2008[62] in Helsby and Frodsham against the backdrop of strong economic performance in the UK as a whole.

8.24 The most important sector in Helsby and Frodsham in terms of employment is financial services (employing 33% of the workforce in 2010) although employment in financial services declined by 9% during the period 2003-2008. Declines were also recorded in ‘transport and communication’ (-54%); public administration (-8%); ‘distribution, hotels and restaurants’ (-5%). Growth was recorded in ‘other services (14%) and construction (60%) although these sectors together made up just 11% of total employment in 2008.

8.25 When location quotients for Helsby and Frodsham are considered, the sectors employing the highest proportion compared to the proportion for England are: electrical equipment (9x); services to buildings and landscape (6x); architecture (4x); veterinary services (3x) and accommodation services (3x).

8.26 At the time of the last census the proportion of residents in Helsby and Frodsham that were employed in senior managerial or professional occupations was significantly higher (26%) compared to England (19%) and this was also reflected in the figures for skills with 29% of

[61] ONS Claimant Count, 2010
[62] Annual Business Inquiry, 2008 (points 8.23 – 8.25)

Local Profiles *cont.*

residents having achieved a level 4/5 qualification compared to an average for England of 20%.

8.27 When the 2007 Indices of Multiple Deprivation are examined for Helsby and Frodsham, there are no LSOAs within the most deprived or the most affluent 5% of LSOAs in England. There is a significant skewing of areas into the upper 50% of LSOAs for England.

8.28 Residents claiming Job Seekers Allowance in Helsby and Frodsham rose by 116% in the period from Dec 2007 – Dec 2010 compared to the rate of increase for England of 76%. This dramatic increase should be seen in the context that there were only 186 recorded claimants for the area in December 2010[63].

Neston & Parkgate

8.29 In 2008 there were 3,995 employees registered as working within the Parkgate and Neston area. This represented just under 3% of employment in CWAC. Employment declined by a 5% in the period 2003-2008[64] in Neston and Parkgate against the backdrop of strong economic performance in the UK as a whole.

8.30 The most important sector in Parkgate and Neston in terms of employment is public administration (employing 31% of the workforce in 2010). Employment in public administration remained stable in the period 2003-2008 but falls in employment were recorded in manufacturing (-36%) and financial services (31%). Some of this decline was offset by strong employment growth (13%) in 'distribution, hotels and restaurants' which resulted in the sector accounting for 30% of employment by 2008.

8.31 When location quotients for Parkgate and Neston are considered, the sectors employing the highest proportion compared to the proportion for England are printing and recorded media (7x), residential care (5x) and veterinary services (2x).

8.32 At the time of the last census the proportion of residents in Neston and Parkgate that were employed in senior managerial or professional occupations was significantly higher (24%) compared to England (19%) and this was also reflected in the figures for skills with 27% of

[63] ONS Claimant Count, 2010
[64] Annual Business Inquiry, 2008 (8.29 – 8.31)

Local Profiles *cont.*

residents having achieved a level 4/5 qualification compared to an average for England of 20%.

8.33 When the 2007 Indices of Multiple Deprivation are examined for Neston and Parkgate, there are no LSOAs within the most deprived LSOAs in England. There is a significant skewing of areas into the upper 50% of LSOAs for England and one LSOA is within the 5% most affluent locations in England.

8.34 Residents claiming Job Seekers Allowance in Neston and Parkgate rose by 62% during the period from December 2007 – December 2010 compared to the rate of increase for England of 76%[65]. This relatively resilient performance should also be recognised in the context that the total claimant count in December 2010 was just 229.

Rural corridor

8.35 In 2008 there were 7,685 employees registered as working within the area defined as the rural corridor. This represented 5% of the employment in CWAC. Employment increased by 1.6% in the period 2003-2008[66] compared to a decline for CWAC as a whole.

8.36 Despite the rural nature of the area, agriculture (excluding farm employment) only accounts for 5% of employment whilst the most important sector in terms of employment is ‘distribution, hotels and restaurants’. Despite employment in the sector declining by 14% in the period 2003-2008 the sector accounted for a quarter of all employment in the area. During this period even the rural corridor registered employment growth in financial services (41%) and ‘other services (33%). Employment in public administration and manufacturing both declined between 2003 and 2008.

8.37 When location quotients for the rural corridor are considered, the sectors employing the highest proportion compared to the proportion for England are forestry and logging (47x), veterinary service (6x), specialised construction (3x), management consulting (3x).

8.38 At the time of the last census the proportion of residents in the rural corridor that were employed in senior managerial or professional occupations was significantly higher (28%) compared to England (19%) and this was also reflected in the figures for skills with 30% of

[65] ONS Claimant Count, 2010
[66] Annual Business Inquiry, 2008 (points 8.35 – 8.38)

Local Profiles *cont.*

residents having achieved a level 4/5 qualification compared to an average for England of 20%.

8.39 When the 2007 Indices of Multiple Deprivation are examined for the rural corridor, there are no LSOAs within the lowest 50% of deprivation across all the LSOAs in England. There are 2 LSOAs within the most affluent 5% LSOAs for England.

8.40 Residents claiming Job Seekers Allowance in the rural corridor rose by 96% in the period from Dec 2007 – Dec 2010 compared to the rate of increase for England of 76%. This dramatic increase should be seen in the context that the total claimant count in December 2010 was just 222[67].

Weaver Towns

8.41 In 2008 there were 24,825 employees registered as working within the area defined as the Weaver Towns. This represented 17% of the employment of CWAC and as such is the third most significant concentrations of employment after Chester and Ellesmere Port. Unlike Chester and Ellesmere Port which suffered declines in employment, employment in the Weaver Towns increased by 2.1% in the period 2003-2008[68].

8.42 The growth in employment in the Weaver Towns in the period 2003-2008 was due to the growth of the service sector. During this period there was growth in employment in financial services (5%), public administration (23%) and ‘other services’ (3%). Conversely, the sector ‘distribution, hotels and restaurants’ declined by 8% although this sector remains the most important sector in terms of employment recording 27% of employment in 2010. In addition, manufacturing, construction and ‘transport and communication’ all registered declines in employment during the period.

8.43 When location quotients for the Weaver Towns are considered, the sectors employing the highest proportion compared to the proportion for England are chemical manufacture (10x), mining and quarrying (8%), manufacture of rubber and plastics (6x) and other manufacturing (2x).

[67] ONS Claimant Count, 2010
[68] Annual Business Inquiry, 2010 (8.41 – 8.43)

Local Profiles *cont.*

8.44 At the time of the last census the proportion of residents employed in 'process, plant and machine operating' work was 9% and in elementary occupations the proportion was 14%. These categories combined make up 23% of the workforce, the highest proportion in CWAC and a high rate when compared to the overall proportion for England of 17%. In terms of skills, at the time of the last census the Weaver Towns had a lower proportion of skills per resident than that for England as a whole. In the Weaver Towns, 33% of residents held no qualifications (29% England) and just 14% held 4/5 level qualifications (20% England).

8.45 When the 2007 Indices of Multiple Deprivation are examined for the Weaver Towns, there is a wide variation in the split of LSOAs. There is one LSOA in the most deprived 5% LSOAs in England and one LSOA in the most affluent 5% of LSOAs in England.

8.46 Residents claiming Job Seekers Allowance in the Weaver Towns rose by 78% during the period from December 2007 – December 2010 compared to the rate of increase for England of 76%. This increase whilst in line with the increase experienced across England, resulted in 1,505 residents claiming Job Seekers Allowance in December 2010[69].

Weaver Valley

8.47 In 2008 there were 16,536 employees registered as working within the area defined as the Weaver Valley. This represented 11% of the employment of CWAC. In terms of employment generation, the area was the strongest performing areas of CWAC in the period 2003-2008 generating employment growth of 14%[70].

8.48 The growth in employment in the Weaver Valley in the period 2003-2008 was due to the growth of the service sector. During this period there was growth in employment in financial services (53%), 'distribution, hotels and restaurants' (26%) public administration (5%) and 'other services' (18%). The sector 'distribution, hotels and restaurants' remains the most important sector in terms of employment recording 29% of employment in 2010. Conversely,

[69] ONS Claimant Count, 2010
[70] Annual Business Inquiry, 2008 (points 8.47 – 8.49)

Local Profiles *cont.*

manufacturing, construction and 'transport and communication' all registered declines in employment during the same period.

8.49 When location quotients for the Weaver Valley are considered, the sectors employing the highest proportion compared to the proportion for England are: food manufacturing (5x); civil engineering (5x); chemical manufacturing (5x); veterinary services (4x) and financial services (3x).

8.50 At the time of the last census the proportion of residents in the Weaver Valley that were employed in senior managerial or professional occupations was higher (24%) compared to England (19%) and this was also reflected in the figures for skills with 23% of residents having achieved a level 4/5 qualification compared to an average for England of 20%.

8.51 When the 2007 Indices of Multiple Deprivation are examined for the Weaver Valley, there are no LSOAs within the lowest 5% of deprivation across all the LSOAs in England. There are 3 LSOAs within the most affluent 5% LSOAs for England.

8.52 Residents claiming Job Seekers Allowance in the rural corridor rose by 85% in the period from December 2007 – December 2010 compared to the rate of increase for England of 76%. This increase which is faster than the substantial rise for England as a whole should also be seen in absolute terms where the claimant count stood at 723 in December 2010[71].

[71] ONS Claimant Count, 2010

Appendix 1

Consultees

Internal consultees

Phill Bamford, LDF Programme Manager

Christopher Capes, Team Leader, Rural Agenda and Market Towns

Tony Clark, Team Leader, Special Projects, Ellesmere Port

Karl Connolly, Senior Manager, Special Projects

Lisa Conway, Senior Manager, Employment, Skills and Learning

Catherine Fox, Team Leader, Special Projects, Weaver Valley

Francis Lee, External Funding and Partnerships Manager

Neil Massingham, Principal, Children's Services

Jamie Matthews, Transport Strategy

Melissa Parsons, Senior Regeneration Officer, Mersey Dee Alliance

Iain Paton, Economic Development Manager

Martin Peace, Senior Economic Development Officer

Filip Prevc, Policy Manager

Caroline Thomas, Senior Officer, Employment Strategies

David Tonks, Team Manager, Housing Strategy

Christine Troughton, Principal Manager, Children's Services

Peter Webb, Project Co-ordinator, Chester Renaissance Programme

External consultees

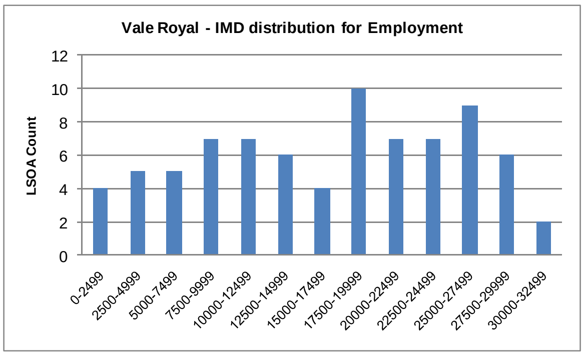
Simon Adderley, University of Chester

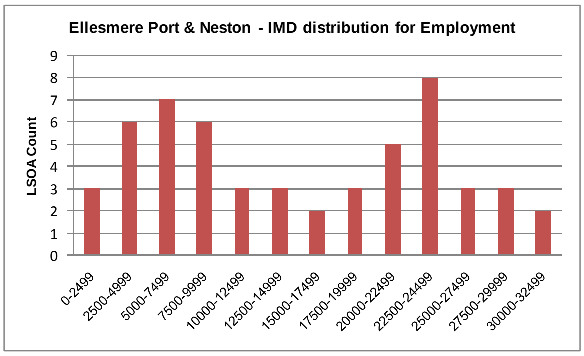
Rob Hindle, Rural Innovation

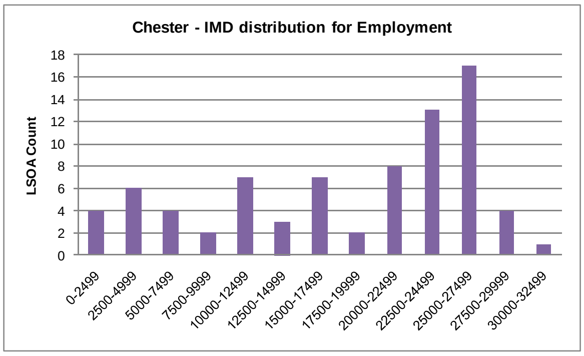
Appendix 2

Indices of Multiple Deprivation

Further charts for the individual deprivation measures of income and employment showing LSOA distribution across each of the former Local Authority areas for CWAC are shown below. In each case the charts illustrate the number of LSOAs within each ranking banding for LSOAs in England.







Appendix 2

Indices of Multiple Deprivation