



West Midlands
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West Midlands Regional Economic Assessment Telford & Wrekin

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1 Background

The Regional Integrated Economic Assessment (RIEA) was commissioned from the Observatory by the Regional Forum of Leaders (RFL) in partnership with Advantage West Midlands (AWM), as a joint response to the requirements of the Sub-national Review of Economic Development & Regeneration (SNR).

It was agreed by the RFL that the RIEA contain three distinct elements:

- An overarching regional summary;
- Thematic chapters (Economic Structure and Output, Communities and Connections, The People of the Region);
- Local authority area profiles (for each of the 14 strategic authorities).

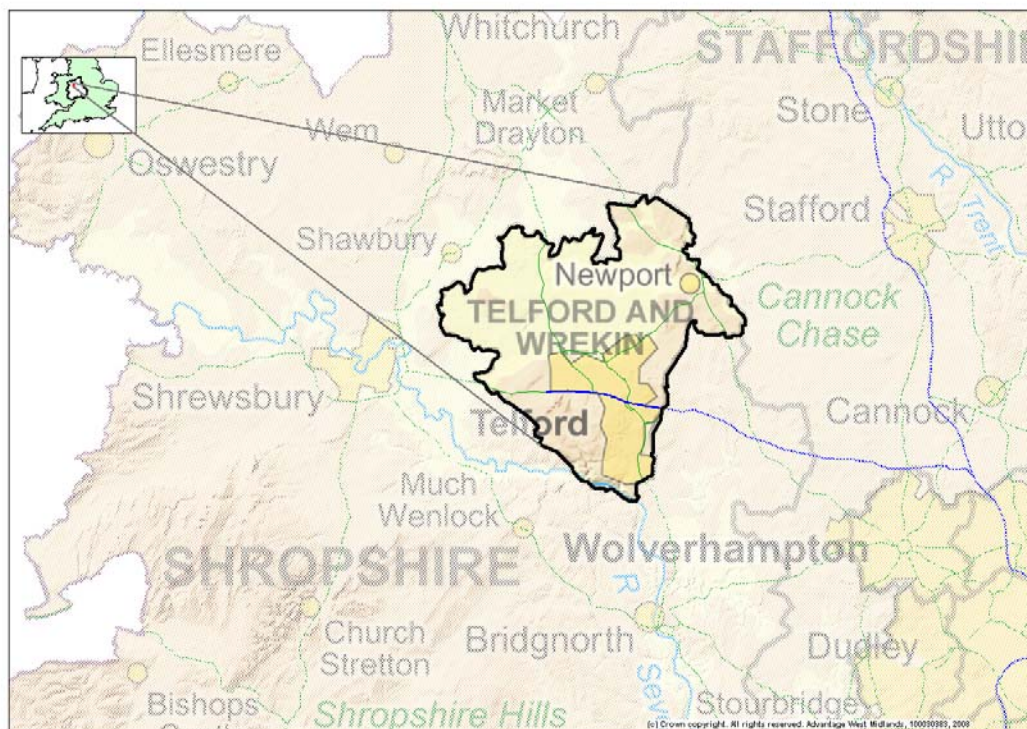
The primary focus of the RIEA is the synthesis of existing data and evidence across the range of themes and local areas. It has been developed by identifying, collating, integrating, analysing and interpreting current information, rather than sourcing new information. The local area profiles incorporate each of the thematic areas, highlighting key characteristics of each area and identifying some of the current issues facing local economies.

The RIEA has been prepared in collaboration with staff from the Region's 14 strategic local authorities. They have supplied much of the evidence which underpins the assessment and have been heavily involved in writing, editing and improving its constituent parts, particularly the local area profiles.

The RIEA constitutes an important **first step** in the longer term iterative development of the evidence base for the single integrated regional strategy. Partners should see the RIEA, and the local area profiles in particular, as a starting point, providing a good foundation for the much more detailed local work required in the preparation of individual Local Economic Assessments as proposed by the SNR.

2 Introduction and Summary

The Borough of Telford & Wrekin is a primary urban area covering 112 square miles but it also has a significant rural area located to the north and west of Telford.¹ It is located in the west of the West Midlands Region and is a regional focus for population and economic growth. Figure 10.1 below shows the boundaries of the Telford and Wrekin Borough, and the main urban area within it.



The borough has an estimated population of around 162,000 (mid-2006), which is growing rapidly and at the fastest rate in the Region as a whole. As a former New Town², Telford and Wrekin has experienced sustained growth for over 40 years. Over this period, there have been significant improvements in its prosperity and physical environment, particularly over the past 20 years.

¹ Rural area covers around 72% of the Borough's total area. Source: Telford & Wrekin Borough Council website.

² The heart of the Borough was designated as a 'New Town' in 1963.

Telford and Wrekin became a unitary authority in 1998, taking over the responsibilities of Wrekin District Council and Shropshire County Council. Telford is the hub of the area's economy and population but the borough also includes several small towns³ that existed before the designation of the New Town. To aid the planning, co-ordination and monitoring of service delivery at a local level, the borough is split into five geographical areas or 'clusters'. These are: Telford Central; North Telford; South Telford; Wellington and Newport.

The overall influence of manufacturing remains strong in the borough, with it and the public services sector forming the boroughs largest employers. Overall, there has also been strong growth in the majority of sectors within knowledge intensive services in the borough.

The positioning of Telford and Wrekin in relation to the major road network can act in its favour. However, related congestion levels are a priority for future economic development of the borough. Telford and Wrekin has seen higher levels of inward investment over the past 10 years than some of the larger Shire counties in the region reflecting both its location and support structures.

The borough has a high quality natural environment and has retained lots of open green space despite a high sustained growth period. It does, however, suffer from pockets of deprivation and is in the top 30% most deprived districts in the Region. The population is generally in good health, and crime levels in the borough are declining overall.

³ These include Wellington, Dawley, Donnington, Madeley, Oakengates, Ironbridge and the market town of Newport.

3 Economic Structure & Output

Output

According to the latest estimate, the total GVA for the Borough of Telford and Wrekin is around £2.6bn in 2005, up from 1.77bn in 1995, with an average annual growth rate of 4.6%. Output from the borough's economy contributed 3.1% of the total regional GVA in 2005. This has decreased marginally from 3.3% in 1995.⁴

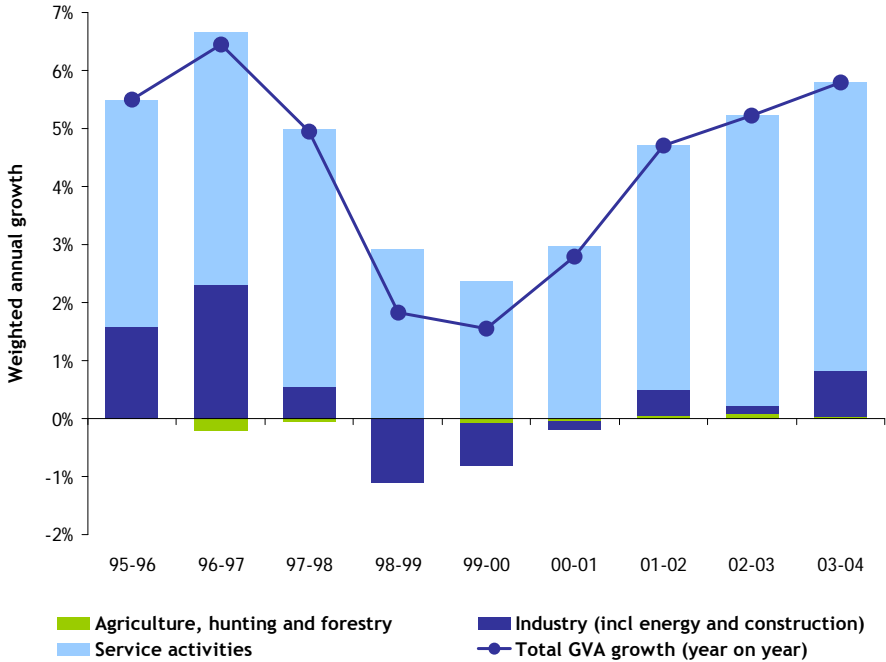
Economies vary considerably in overall size; output from Birmingham at £18bn is estimated to be over 7 times larger than the output of Herefordshire. While, total GVA growth is an important measure of economic strength, it can conceal the key drivers in changing economic performance. GVA per head is the preferred measure, as it enables a more detailed analysis of comparative output performance.

The borough's GVA per head of population has increased steadily over the last eight years, but not as much as the West Midlands Region or England as a whole. The latest estimate of GVA per head in Telford and Wrekin is £16,457 in 2005, up from £16,053 in 2004, representing an increase of 2.5%. This annual rate is below the longer term trend of 3.3% per year since 1995.

In 2005, GVA per head in Telford and Wrekin continues to be above the regional average. In 1995 Telford and Wrekin was in a relatively strong position compared to the West Midlands Region, with a GVA ratio of 1.19. However, since 1995 the lower growth rate in total output has seen this ratio decrease by 15 percentage points to 1.04.

⁴ ONS Regional Accounts

Figure 10.1: GVA growth across major sectors in Telford and Wrekin



Source: ONS Regional Accounts, 2005

GVA growth in Telford & Wrekin is underpinned by a relatively high employment rate, which reached 78%⁵ in 2006. Figure 10.1 highlights that total output growth in the borough has been led by the services sector⁶. The overall influence of manufacturing remains much stronger than in the other areas of the Region. The trend in declining employment in this sector seems to have been reversed, which is not the case at either the regional and national level.

Productivity

Average labour productivity can be broadly measured using GVA per employee. Recent estimates for GVA per employee in Telford and Wrekin show that it has fallen slightly and has dropped from close to the regional average to 8% below it. In 2005 GVA per employee in Telford and Wrekin was estimated to be around £33,000, almost the same as in 2003. By comparison, GVA per employee for the region grew by just 6.5% over the same period. For these analyses numbers of employees are sourced from the Annual Business Inquiry (ABI/1).

⁵Source: ONS Annual Business Inquiry analysis 2006 Figure is above regional average of 77.1.
⁶ From 1995 to 2004 services rose by 81.7% from £911m to £1,654m

Recent analysis by ONS (Wosnitza & Walker) uses an alternative measure of productivity, GVA per filled job, which makes use of estimates of workforce jobs (WFJ). WFJ is a measure of the total number of jobs in an area. This encompasses not only employee jobs (as estimated by ABI/1) but also self-employment jobs (from the Labour Force Survey (LFS) and Annual Population Survey (APS)), those serving in HM Forces and government-supported trainees. As one might expect, using a WFJ related estimate of productivity, GVA per filled job, produces somewhat different results for Telford and Wrekin as compared with GVA per employee. For 2005, GVA per filled job was around £29,250 - approximately 7% below the regional average of £31,500. There has also been a relative deterioration since 2001 when GVA per filled job for Telford and Wrekin was approximately 5% below the regional average.

Wosnitza & Walker demonstrate how GVA per head can be decomposed into four factors, namely: productivity per filled job; the commuting rate; the activity rate; and the employment rate. This approach is discussed further in the thematic chapter dealing with Business in the regional economy.

One can examine why a given authority's GVA per head lies above or below the regional average by comparing its scores on each of the four factors against the corresponding regional averages. In Telford and Wrekin's case, its productivity, at around 7% below the regional average, depresses its relative GVA per head. However, Telford and Wrekin's employment rate and activity rate are above the regional average. In fact its activity rate is the highest within the region and has strong positive impact on GVA per head. Telford and Wrekin experiences slight net outward commuting, but this is in line with the commuting rate for the region as a whole and so has a negligible impact on its relative GVA per head.

Using GVA per employee as a measure of average labour productivity does not take account of the number of part time and full time workers in an area. Telford and Wrekin has a much lower proportion of part-time employees (27.1%) compared to the regional average (31.2%)⁷. Since 2000 there has however, been some growth in part-time working within the borough. This has largely been attributed to growth in service sector and retail employment which offer job-sharing opportunities and more flexibility in employment.

According to latest employment estimates⁸, manufacturing and the public services sector continue to be the borough's largest employers. Around 1 in 4 (26.6%) employees work in public administration, health and education services and a fifth (21.1%) work in manufacturing.

⁷ ONS: annual business inquiry employee analysis 2006

⁸ Source: ONS Annual Business Inquiry analysis 2006

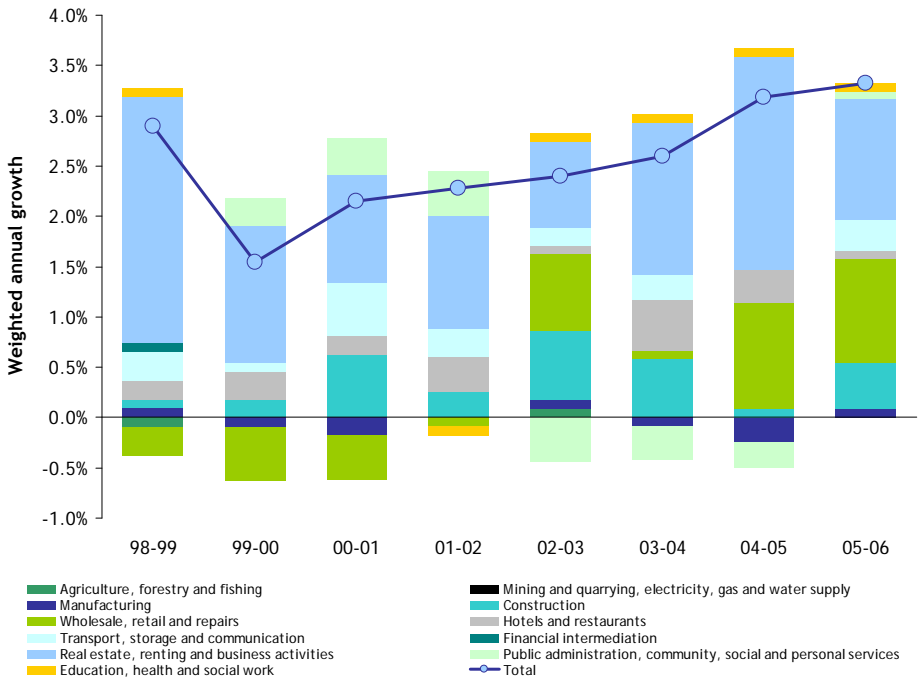
The borough has also experienced a higher level of growth in distribution, hotels and restaurants (see discussion below on enterprise). In 2006, the percentage of employment in this sector (22.2%) has reached a similar level to the Region as a whole (23.7%). Employment growth is in keeping with new VAT registrations in hotels and restaurants. These showed a growth of 28% between 1994 and 2005, although registrations for wholesale and retail activities fell.

Enterprise

The stock of businesses in the borough grew at an average rate of 2.5% per year between 1994 and 2007 compared to 1.4% for the Region as a whole. The business services sector consistently accounted for a large proportion of that growth, although a range of other sectors also contributed. ⁹

Figure 10.2 shows the contribution of each sector to overall business stock growth since 1998.

Figure 10.2: Sector contributions to year on year growth in Telford and Wrekin business stock 1998 - 2006



Source: BERR Small Business Service Analytical Unit

⁹ BERR Small Business Service Analytical Unit

As with GVA the different sizes of sub-regional economies make effective comparisons difficult. As a means of standardising measurements economists use population based measurements; the most widely used is to measure activity as a ratio per 10,000 of the population.

As a measure of business density, the number of businesses per 10,000 of the population provides a comparative indicator. Business density increased across the borough from 212 firms per 10,000 in 1994 to 253 by 2006, over 55 firms per 10,000 lower than the regional average.

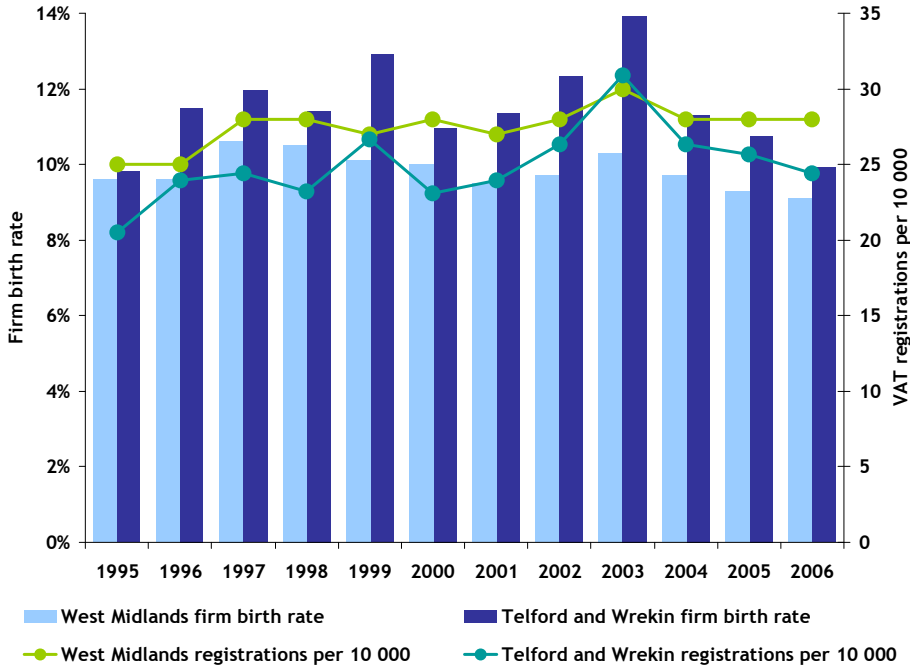
The number of VAT registered businesses in Telford & Wrekin has been steadily increasing since the late 1990s. The stock of businesses in the borough grew at an average rate of 3% per year between 2000 and 2007, compared to 1.6% for the Region as a whole. Manufacturing accounts for around 12% of the business stock but this sector's percentage share of business stock has declined from 2000, at an average rate of 1% per year.

In contrast, faster growth has been in the number of businesses in both the real estate and business services and hotels and restaurants sectors within the borough. Faster growth in the numbers of firms in the real estate and business services sector, which grew at an average rate of 6.9% per year since 1994, has seen the share of this sector rise from 16% in 1994 to 26% in 2007. On the whole the overall changing pattern of new business formation is more diversified than other areas, where real estate has a far greater share of total growth.

In Telford and Wrekin, the rate of VAT registrations per 10,000 of population is lower than the regional average. The available figures from 2007 indicate that the rate was 3 percentage points lower at 31 registrations per 10,000, compared with 34 per 10,000 for the West Midlands Region. The majority of new registrations have been in the real estate, renting and business services sector.

Evidence suggests that new business formation rates are higher in rural areas due to higher skills levels among residents and an entrepreneurial nature. The VAT registration rate per 10,000 does not reflect possible agglomeration effects from spatial concentrations of existing businesses. Major urban areas tend to have above average VAT registration rates than less densely populated rural areas. Figure 10.3 shows the rate of new registrations as a percentage of the stock at the start of the year; this is a measure of the 'birth rate' of new firms.

Figure 10.3: Comparison of business formation in Telford and Wrekin and the West Midlands region, 1995 to 2006



Source: BERR Small Business Service Analytical Unit

Historically, the borough has a rate of new firm formation, as a percentage of existing stock, higher than the regional average. Between 1995 and 2006 the average business ‘birth rate’ in the borough was 11.5% compared to the regional average of 9.8%.

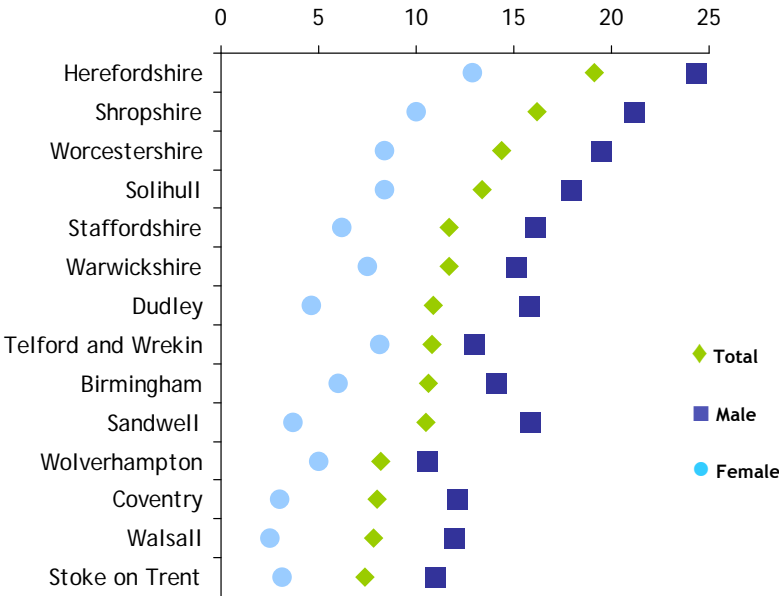
One way around the potential bias of comparing on the basis of just a population base or stock base measures independently is to compare the two together in an ‘enterprise index’. The index measures the borough against the regional averages for VAT registrations per 10,000 and firms’ birth rates. Each is equally weighted 50:50 to give a composite index.

Table 10.1 highlights that the higher birth rates and lower registration rates relative to population balance out, giving a level of enterprise close to the regional average.

Area	1994	1998	2002	2006
West Midlands	100	100	100	100
Telford and Wrekin UA	103	100	113	99

Self employment is also a measure of entrepreneurial activity in an area. Figure 10.4 shows the overall rates of self-employment and the gender breakdown. In Telford & Wrekin the self-employment rate has increased year on year from 8.7% in 2004 to 10.8% in 2006, although it continues to be marginally below the regional average of 11.6%¹⁰. While the rate of self-employment among males is below the regional average, the proportion of women reported as self employed was higher than the region, placing Telford and Wrekin as third highest for female self-employment below the shire counties of Herefordshire and Shropshire.

Figure 10.4: Self-employment rates, as percentages of all employed by gender and local authority area



Source: ONS Annual Population Survey, 2006

Telford & Wrekin Council have taken a quality not quantity innovative approach to social enterprise over the years, with local authority support provided to key initiatives. The Council is currently looking at its future partnership approach to social enterprise. Some high profile initiatives have been in existence for over 15 years such as Fairshare Credit Union and Wrekin Care Co-operative. The more recent well known social enterprises in Telford cover AFC Telford United Football Club and the emerging national pilot sports hub Telford Sports Learning and Enterprise Community. Both these initiatives have won national awards.

¹⁰ Annual Population Survey (Source: National Statistics website www.statistics.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO)

Knowledge Economy

The contribution of knowledge intensive services¹¹ in terms of overall employment has increased within Telford and Wrekin compared to the regional and English average. In 2006 estimated employment in these sectors was just over 33,600 an average increase of around 6% per year between 2000 and 2006 compared to just under 3% per year regionally.¹²

However, the contribution of the knowledge intensive services in terms of the proportion of overall employment in Telford and Wrekin fluctuated between 2003 and 2006, although this may be partly due to sampling errors. The overall share of the workforce employed in this sector have remained below both the regional and National averages. However, by 2006 the gap had narrowed considerably to 2% below the regional average of 44%.

Our analysis estimates that, higher local growth resulted in a level of employment in knowledge intensive services 6,000 more than would have been generated had the region grown at the same rate as the sector nationally.

The significant increase of employees in these sectors is due in part to the increase of employees in management and professional occupations. Overall within the borough there has been strong growth in the majority of sectors within knowledge intensive services.

Investment

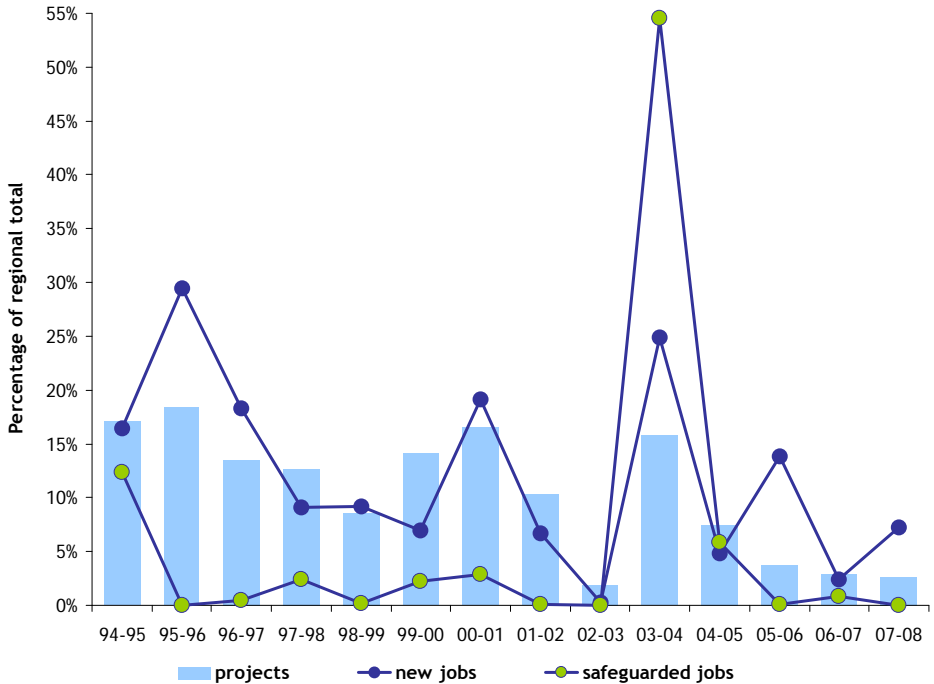
Since 1994, Telford & Wrekin has attracted over 100 inward investment projects. During this time these overseas owned companies created over 8,000 new jobs (both figures similar to that of Warwickshire, a county nearly seven times the size) and safeguarded over 5,000 more. This amounts to 10% of all investments, 13% of new but only 3% of safeguarded jobs in the Region. Telford & Wrekin had had more inward investment projects than Solihull, Worcestershire, Shropshire or Herefordshire. The 'spike' on safeguarded jobs as seen in 2003-04 (Figure 10.5) was the retention of Inland Revenue contracts by Cap Gemini.¹³

¹¹ Total knowledge-intensive services is defined by Eurostat The sectors included are NACE Rev. 1.1 codes 61, 62, 64 to 67, 70 to 74, 80, 85 and 92. These are consistent with SIC 2003 codes

¹² Analysis of data from ONS Annual Business Inquiry Employee Analysis

¹³ Advantage West Midlands

Figure 10.5: Inward Investment Projects and Jobs into Telford and Wrekin, 1994-2008



Source: Advantage West Midlands

Two thirds of inward investment into Telford and Wrekin is made by three countries, Germany, Japan and the United States (in that order). Telford is particularly well known for the number of Japanese companies who choose to invest there and a large social infrastructure has been built up to support this with schooling, retail, social clubs and educational facilities being created to serve the large Japanese community there. Other significant investors are France, Switzerland, Canada and Taiwan.

Some of the major Japanese investors that can be found in Telford and Wrekin include Makita, Oghara, Seiko/Epson, Kiyokuni, Ricoh and Denso

According to the figures¹⁴ for 2007, almost 48% of employment in Telford and Wrekin is within foreign owned companies. The data relates to local units rather than enterprises to avoid the issue of reporting offices affecting the data. This figure is above the regional average of 42% and represents the third highest proportion in the region, marginally behind Solihull and Sandwell.

To deliver sustained growth, the commercial and industrial infrastructure of the borough has continued to expand. Between 2001/02 and 2005/06 an average of 38,630m² of floorspace was developed for commercial and industrial purposes. Over the last five years, the Council has worked with 13 companies, either as new investors or as local expansions.

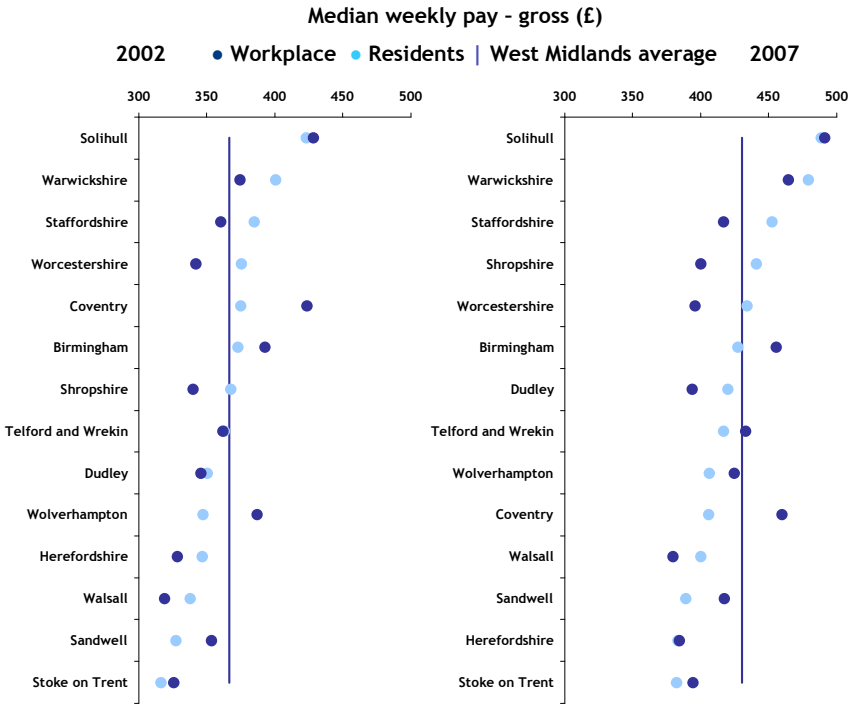
¹⁴ Data provided by ONS. Data is a count of local units taken from the Inter-Departmental Business Register

Earnings and Income

In 2007, the average (median) gross weekly earnings for full-time employees working in Telford & Wrekin were £433.00, compared with £430.00 for the West Midlands Region and £462.00 for England.¹⁵ Telford & Wrekin is one of the five West Midlands authorities where earnings are above the regional average, although 2007 was the first time the borough has exceeded this and the difference is marginal (Figure 10.6). From 2004 to 2007, the average (median) gross weekly earnings have increased by almost 16%, compared to the regional average of around 9%.

Workplace earnings were higher than those of residents in 2007; Telford and Wrekin is ranked mid-table in terms of residents' earnings, with Dudley moving above the borough in 2007.

Figure 10.6: Median weekly earnings by local authority area



Source: Annual Survey of Hours and Earnings

Gross Disposable Household Income (GDHI) per head is a measure of economic welfare. It takes into account not only wages and salaries but other forms of income such as property income, pension income and social benefits. Payments of tax, social contributions, and certain other outgoings are deducted to arrive at disposable income. ONS publishes estimates of GDHI per head down to NUTS3 level.

¹⁵ 2007 Annual Survey of Hours & Earnings, Office for National Statistics (ONS)

The provisional estimate for Telford and Wrekin's GDHI per head for 2006 was £11,826 which was almost 6% below the regional average of £12,546 per head. The provisional data also suggests that the growth of Telford and Wrekin's GDHI per head between 2005 and 2006 was at around 2.8%, marginally lower than the corresponding regional growth rate of 3.0%. In index terms (where UK average GDHI per capita = 100) the index value for Telford and Wrekin in 2006 at 86 has declined markedly from its index value of 95 in 1995. Over the same period the index value for the West Midlands region declined marginally from 92 to 91. Hence while Telford and Wrekin's GDHI was comfortably above the regional average in 1995, it had fallen significantly below by 2006.

4 Communities and Connections

Transport

Transportation and communication infrastructure is an important issue, as it impacts on employment, health, access to services and quality of life. Telford new town was planned around unrestricted car use and thus the majority of the town's transport infrastructure is centred on supporting car users as opposed to public transport, walking and cycling.

This makes future developments of public transport more difficult to achieve than other areas where public transport has long been embedded in the development process.

Fast train links with London and direct trains to Birmingham International Airport are seen as crucial to future development in Telford & Wrekin. Another priority stems from the positioning of Telford & Wrekin in relation to other major road networks, since congestion on the West Midlands motorways currently contributes to location issues for both passenger and freight traffic. The Donnington Rail Freight project, restoring a stretch of railway closed in 1991, will allow freight trains to reach the national network, addressing this block to local growth and investment.

Telford and Wrekin is less dependent on road transport compared to the Region as a whole. There was an estimated 8,300 vehicle kilometres per head in terms of road traffic flow in 2006, representing a 0.5% decrease compared with 8,340 in 2002¹⁶. Both these figures are below the regional average. Considering that the transport infrastructure of the New Town was designed primarily for the car, this relatively low vehicle kilometres per head estimate suggests that residents of Telford only have to travel relatively short distances to access both employment and services.

¹⁶ Source: Department for Transport Road Traffic Statistics for Local Authorities

The nature of Telford & Wrekin's spatial lay-out resulting from its history as a New Town plays a key role in how the working population travel to work. The geography of Telford & Wrekin makes it difficult to deliver a good public transport system linking people to employment. Not surprisingly, the 2005 West Midlands Regional Lifestyle Survey found that more than four in five (74.7%) of the borough's working population travelled to work by car, including those travelling as passengers as well as those driving on their own or with passengers. This was higher than the regional average of 71.3%. In contrast, just 3.1% of Telford & Wrekin's working population travelled to work by bus, less than half the regional average of 6.7%¹⁷. A sustainable transport system has been highlighted as a priority to provide alternatives to travelling by car and improve access to facilities, services and employment. This would help to reduce those travelling to work by car and/or prevent congestion in the future. At the same time it would also be helping to reduce CO₂ emissions, as part of the Council's Climate Change Strategy.

The distances being travelled to work are characterised by a higher proportion (66.7%) of people travelling less than 10km, reflecting the relatively high proportion of residents using local employment opportunities. This figure is also higher than the regional average of around 62%. Apart from those working from home (7.8%), the majority of the remaining residents (14.2%) commuting to work travel between 10km and 30km. This is below the regional average of 19.4%. As people are, overall, travelling relatively short distances, this can be a major factor in traffic congestion. In Telford and Wrekin this is currently not a problem. However, as the borough's population grows over the next 20 years, the Council has highlighted that it is essential that the use of public transport or other sustainable alternatives are encouraged, so that congestion does not become an issue.

In recent years the borough has focused on improving public transport. The number of bus journeys in the Borough has increased year on year since 2000/01. From 2000/2001 to 2006/07 there has been an increase from 5.5 million journeys to 6.306 million¹⁸. The percentage of rural homes within 800 metres of an half hourly or better bus service has increased from 21% in 2001 to 36% in 2005/06.

The improvement of road conditions and road safety are other issues that have been identified to ensure safe and efficient access to employment, education and services as well as to facilitate economic growth. Maintaining existing transport infrastructure presents a particular challenge to the council, since the majority of Telford's transport infrastructure was built over a relatively short period (late 1960s - 1980s) and much of this infrastructure is decaying at the same rate. This means that as opposed to other areas of the West Midlands where capital maintenance and renewal of infrastructure can be effectively programmed over long period Telford significantly disadvantaged by having to 'squeeze' maintenance and renewals into a very short period.

¹⁷ Regional Lifestyle Survey 2005

¹⁸ Telford & Wrekin Local Transport Plan 2001-2006

Housing

Housing affordability in Telford & Wrekin is one of the better ratios in the Region. Although this is below the regional average it still presents problems for many people. The lower quartile house price in the borough is currently just over 6 times the lower quartile income (2007)¹⁹. This ratio is marginally below the regional average (6.86). However, it still means that a proportion of residents, and not just the lowest earners, will not be able to afford to buy a home. There has been a similar decrease (95%) in affordability over the last 10 years compared to the regional average (98%).

The need to provide affordable homes has been recognised; a 2005 update of the Housing Needs Study for the borough suggested a (net) need for 540 affordable homes per annum (2001-2011). Of these 321 units (59%) per annum would need to be socially rented. The most recent (2007) Housing Market Assessment has indicated a need for 1700 affordable (social and intermediate) homes which would require over half of the Regional Spatial Strategy requirement of 1300 homes per year to be affordable. The Council have indicated that this would be very difficult to achieve. It seems likely that housing affordability issues have driven the sharp increase seen recently on the social housing waiting list²⁰.

Between 2000 and 2006, the average price of a house in Telford & Wrekin increased by 115% from £63,171 to £135,721. Although this increase was faster than the average increase for England & Wales, the average price of a house in Telford & Wrekin in 2006 was just under £30,000 lower than the national average. Over the same period, average annual income in the borough rose by 27.4%, whereas house prices more than doubled, meaning despite average house prices being below the national average, affordability issues persisted for local residents.

Information from the 2001 Census relating to housing tenure indicated that owner occupation had increased marginally between 1991 and 2001. At 70% this was similar to the national level. In 2001, however, a higher proportion of households (22.1%) in Telford and Wrekin were living in accommodation rented from a social landlord, compared to England and Wales as a whole (19.1%).

¹⁹ DCLG Ratio of lower quartile house prices to lower quartile earnings by district 2007

²⁰ Choice Based Lettings

The number of new housing completions has been falling in the borough (6.8%) since 2004. This decline is in contrast to growth experienced in the Region as a whole (14.2%)²¹ However, in October 2006, Telford & Wrekin was designated as a 'New Growth Point', to work in partnership with Government to realise the Borough's potential for sustainable housing growth. As a result new housing completions should rise dramatically as new housing developments are built over the next few years. It is now forecast that an additional 13,000 new homes will be built in the Borough over the next 10 years²².

Just less than 1% of Telford & Wrekin's housing stock is new build homes which is a slight increase since 2002/03²³. Although this is only a small amount of growth, it exceeds the regional average of 0.6%. Affordable housing as a percentage of new housing completions fell in Telford & Wrekin between 2002/03 and 2003/04 from 16.2% to 15% but rose to 18% in 2004/05. Telford & Wrekin is still, however, some 7% behind the regional figure (23.1%).

Future allocations²⁴ however are very positive for the area, incorporating some affordable provision on the back of private developments and some wholly affordable schemes too.

Land Use

To protect the green and open nature of the borough, development on previously developed land (PDL) has been promoted in preference to the development of Greenfield land. The use of PDL for housing in Telford & Wrekin has been steadily increasing over the past few years and led to an annual average of 70% between 2001 and 2006. In 2006/07 a higher proportion of new dwellings were built on PDL in Telford & Wrekin than the Region as a whole²⁵. In that year, around 87% of new homes were on PDL compared to the regional average of 84%.

As the amount of employment land available continues to decrease, further sites will need to be found for sustained growth within the borough. As already noted above, an average of 38,630m² of floorspace was developed for commercial and industrial purposes between 2001/02 and 2005/06. In common with housing developments in the borough a high proportion of development has been on PDL, at an annual average of 79% between 1999 and 2006.

²¹ Source: DCLG 2006

²² NPG and RSS Target

²³ Source CLG 2008.

²⁴ Housing Corporation, 2008

²⁵ Regional Housing Land Availability Survey, 2007

Telford and Wrekin has a higher proportion of greenspace (72%) than developed land. It is the Council's intention to limit the development of Greenfield land wherever practicable to conserve the open nature of the borough²⁶.

Connections

The number of people who work in Telford & Wrekin is slightly less than the number of people who live there who are in employment. Data from ONS from 2005²⁷ shows that the workplace based workforce of Telford & Wrekin was 1% smaller than the residence based workforce. This indicates a very small net out-commute which is in contrast with the figures from the Census 2001 data explored below.

The 2001 Census provides a more detailed breakdown of travel to work patterns. In Telford & Wrekin there was a higher level of net in-commuting of around 5,679 people.²⁸ The majority of these people were from neighbouring areas. Over a third (2,111) of the net in flow was from the Bridgnorth district. Other significant in flows were from the Shrewsbury & Atcham and North Shropshire districts. There were around 1,987 more people commuting to Telford & Wrekin from Shrewsbury & Atcham than in the opposite direction and around and 1,138 people from North Shropshire. A further significant net in flow (618 people) was from South Staffordshire. On the other hand, there were significant net out flows of workers to Birmingham, Wolverhampton and Sandwell.

Migration figures for 2006 indicate that there was a net loss of 600 people²⁹ moving from Telford & Wrekin to other areas within England and Wales. A high proportion of migrants moved to neighbouring areas, mainly to Shropshire, but also to Staffordshire, as well as to Birmingham and Wolverhampton. The highest proportions of In-migration to Telford & Wrekin were also from these areas. It is projected that there will be an on-going in-migration of families and children into the borough as the local housing stock grows.

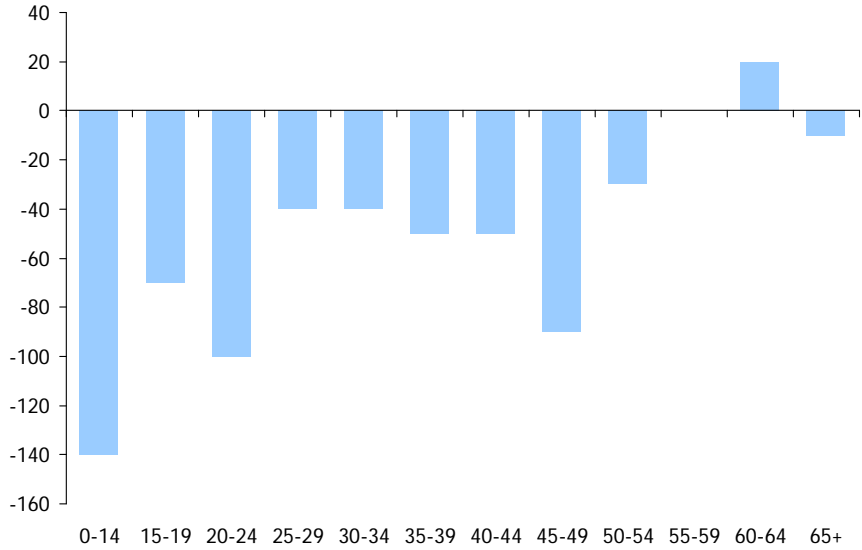
²⁶ Land Use Change Statistics, Defra, 2006

²⁷ Regional economic indicators, May 2008, with a focus on differences in sub-regional economic performances http://www.statistics.gov.uk/elmr/05_08/

²⁸ Information from the census indicated that there were 13,177 people working outside the borough but a total of 18,856 working in the borough from other locations.

²⁹ Patient Register data. A total of 5,300 people moved into Telford & Wrekin and 5,930 moved out to other areas of the UK.

Figure 10.7: Net Migration levels between Telford & Wrekin and the rest of the UK



Source: ONS internal migration statistics year ending June 2006

Figure 10.7 illustrates the net flow of migrants from Telford & Wrekin by age group. It is evident that during 2006 most losses were in the youngest age groups, reflecting the migration of families with young children out of the borough. There is more limited outflow of people in the older age groups. The only net gain (of 20 people) was in the 60-64 age group.

The number of National Insurance Number registrations³⁰ (NINo) is used as an indicator of international migration. During the financial year 2006-07, there were 1,370 registrations in Telford & Wrekin. The majority (60%) of workers came from the A8 states. Of these registrations, most (49%) came from Poland followed by Slovakia (6%), Czech Republic (2%), Latvia (1%) and Lithuania (1%). Relatively few, (1% from Bulgaria and 1% from Romania) originated from the new A2 states. The proportion originating from A8 states is larger compared to either the regional proportion (52%) or UK figure (45%). Other significant proportions of international migrants came from India and Ghana, each accounting for 7% of registrations

³⁰ National Insurance Recording System (NIRS)

Environmental Resources

In 2005, carbon dioxide emissions from Telford & Wrekin were estimated as 8,100kg per person, compared with 7,400kg per person across the Region as a whole³¹. Emissions from Telford & Wrekin are amongst the highest in the Region. These have however, decreased by around 6% since 2004. At 25%, transport emissions are much lower than the regional average of 31%. Domestic emissions accounted for 29%, and those from industrial and commercial sources 46%, both of which are above the regional averages. The remaining 1% of emissions related to land use change.

The proportion of waste that is either recycled or composted in the borough has risen dramatically from 8.4% in 2000/01 to 30.5% in 2005/06³². This 2005/2006 rate puts Telford and Wrekin in DEFRA's top ten highest recycling and composting unitary and metropolitan councils in the country.

The West Midlands Regional Lifestyle survey (2005) found that nine out of ten households in the borough recycle some of their waste. This recycling is done mostly through the Council's kerbside collection service but only 64.2% in Telford & Wrekin used this service, compared to 75% in the Region. The 2007 Community Panel survey showed that 91% recycle more than they did 2 years ago (i.e. when the WMRLS was undertaken) and 84% were satisfied with kerbside recycling. In 2007 a green apple gold award was allocated to the Council for their approach to educating and engaging members of the public about their recycling and waste collections.

Deprivation

Telford and Wrekin is in the top 30% most deprived districts in the West Midlands Region. The borough has 6 lower level super output areas (LSOAs)³³ in the top 10% most deprived nationally, representing around 6% of the population of the borough living in these areas, located in Woodside (2), Malinslee (2), College and Brookside. A further 17 LSOAs are in the top 10-20% most deprived nationally, representing around 16% of the total LSOAs in borough and 16% of the population. The most deprived LSOA in the Borough is located in Woodside and the least deprived LSOA is located in Priorslee.

³¹ Source: End User Local and Regional Estimates of Carbon Emissions

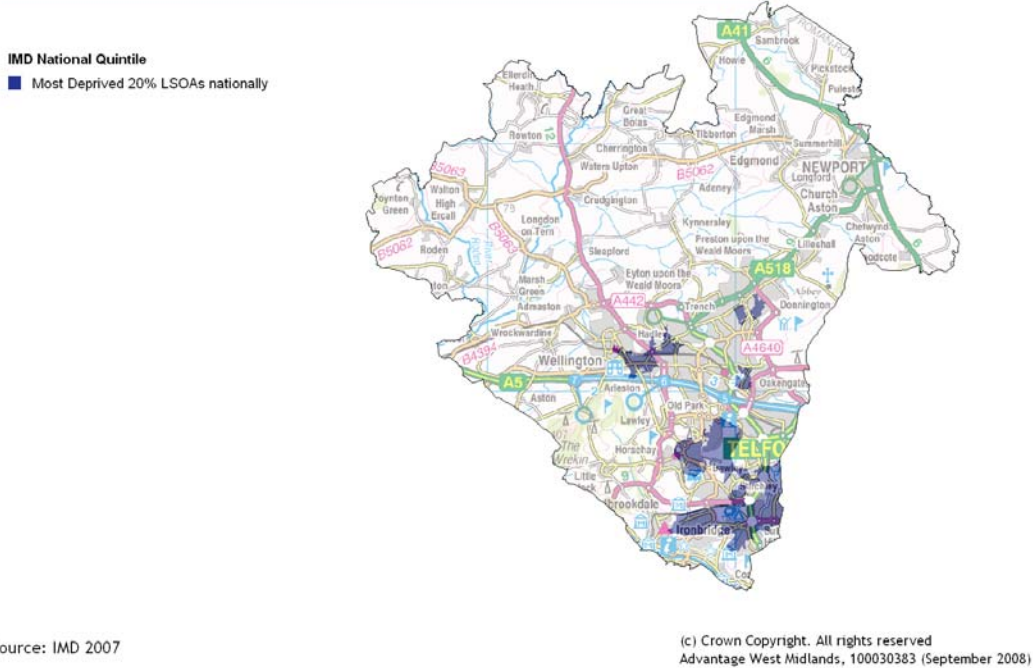
³² Defra, Municipal Waste Statistics 2007 -

<http://www.defra.gov.uk/environment/statistics/wastats/archive/mwb200607a.xls>

³³ LSOAs are small areas (population of about 1500) which are increasingly used for local area statistics.

Figure 10.8: Telford & Wrekin LSOAs by Index of Multiple Deprivation Quintiles

Indices of Multiple Deprivation, 2007 - Telford & Wrekin



Looking specifically at the individual domains which make up the Indices of Deprivation, the borough’s worst performing domain is Education, Skills and Training. A total of 21 LSOAs are in the 10% most deprived nationally, with 5 of these located in Woodside, making it the most deprived district in the borough. A further 15 LSOAs are in the next 10% most deprived nationally.

The second worst performing domain relates to crime. There are 15 LSOAs in the 10% most deprived nationally in this domain, with Malinslee (3 LSOAs) being the most deprived. Another 14 LSOAs are in the next 10% most deprived nationally.

With regard to income deprivation, Telford & Wrekin is in the most deprived 25% nationally. A total of 24,240 people, (15.3% of the population) in the borough are income deprived, with 12 LSOAs in the 10% most deprived nationally and a further 14 LSOAs in the next 10% most deprived nationally.

Telford and Wrekin does not perform well in most of the other domains. The only exception is the Living Environment domain in which there are no LSOAs in the most deprived 20% nationally.

Environment

One of Telford & Wrekin's major achievements is that it has retained a high quality natural environment during its sustained growth period since being designated as a New Town. Local people regard the rural feel of the Borough as one of the best features of the area.³⁴ Consequently the Council has made it a key priority to conserve the high quality natural environment of the Borough and protect it from housing and commercial development where practicable. Thirty eight percent of the urban area of Telford is open space and designated as Green Network. These key areas of open space will continue to be enhanced to fulfil their maximum potential to contribute to sustainable and healthy communities

Despite being a large urban area, Telford & Wrekin has a rich, diverse natural environment. This includes four Local Nature Reserves, eight Sites of Special Scientific Interest, the Wrekin (a designated area of outstanding natural beauty (AONB)) and numerous County Wildlife Sites.³⁵ The Council also works in partnership with others (e.g. Shropshire Wildlife Trust) to promote biodiversity. In 2007, the borough received the Green Apple Award for the creation of wild flower areas

In respect of the local living environment, clean streets, parks and open spaces that are free of litter, graffiti and other environmental degradation has a major impact on the quality of life in local neighbourhoods. Reducing unacceptable amounts of litter forms a key part of the Government's Cleaner, Safer, Greener Communities programme. The figures for 2005/06 indicate that only 4.2% of the surveyed areas in Telford & Wrekin had unacceptable levels of litter, which was significantly below the regional average of 16.7%. The borough was the second best out of the 14 authorities of the Region, with only Sandwell having a marginally better score (4.0%). Furthermore, the percentage of land areas in Telford & Wrekin below acceptable levels of cleanliness has seen a 26.9% decrease between 2003/04 and 2005/06³⁶.

Telford & Wrekin does not currently have any designated Air Quality Management Areas. However, the borough is about to begin a new period of very rapid housing and economic growth (as a Housing Growth Point), and there will be a need to ensure sustainable development respects the local environment.³⁷ The Council, with partners, has recently published a Climate Change Strategy. This proposes that the Borough should be looking to reduce annual CO₂ emissions by 20% by 2026, and that the Council itself should reduce emissions by 10% by 2010/11. Addressing the issue of air quality is therefore a key priority if the Borough is going to meet these targets.

³⁴ LAA document Story of Place Telford & Wrekin Borough Council January 2008

³⁵ Source: Telford & Wrekin Borough Council website

³⁶ Best Value Performance Indicators, www.bvpi.gov.uk

³⁷ LAA document Story of Place Telford & Wrekin Borough Council January 2008

In terms of deprivation, Telford & Wrekin has no LSOAs in the Living Environment Domain, in either of the sub domains. Information from the Borough Council indicates that high proportions of residents living within each of the geographical 'clusters' are satisfied with their local area as a good place to live. Scores ranged between 63% (Telford South) and 89% (Newport).³⁸

³⁸ BVPI Satisfaction Survey 2006.

5 The people of Telford & Wrekin

Demographics

The current population estimate for Telford & Wrekin is 161,900³⁹⁴⁰. It has grown by 15% since 1991, amounting to an increase of 20,600 people. This growth rate is one of the fastest in the Region. The average annual rate of growth between 1991 and 2001 was 1.2%. However, since 2001 the rate of population growth has slowed, with an average annual rate of growth of 0.4%.

The Borough's population has a younger age profile than the regional average. In 2006, estimates showed that there are more people of working age, at 62.8% marginally higher than the regional average (61.2%). Within the borough, only around 19% of the population is over retirement age. The proportions of the population in the older age groups (70+) are lower than the regional averages. There are more persons under 25, around 32.9%, which is above the regional average (31.8%), despite any students living away from home being excluded from the borough's population and recorded at their term time address. There is a higher proportion of the population who are aged between 30 and 49, with the largest differences in the 35-39 and 44-45 age groups. These percentages are above the regional averages for these age groups.

Between 1991 and 2001, changes in the age structure of the borough's population resulted in an increase of 11,300 (13%) people in the workforce, increasing at an average annual rate of 1.2%. This rate of growth was significantly above the regional average of 0.2%. Numbers in the workforce continued to increase between 2001 and 2006. A further 1,800 people are now of working age, representing an increase of around 2% at an annual growth rate of 0.4%.

³⁹ Source: 2006 mid-year estimate, Office for National Statistics (ONS)

⁴⁰ Telford & Wrekin have disputed the ONS's population projections and mid year estimates for many years now and the inadequacies of the ONS's population models in terms on accurately counting Telford & Wrekin's population are accepted. As a result Telford & Wrekin commissioned Prof. Les Worrall of the University of Wolverhampton to produce a way of accurately estimating the population of the borough. Those estimates show that ONS's projections systematically undercount the borough's population, which is (mid year 2007) in the region of 165,500.

By 2026, the population of Telford & Wrekin is projected⁴¹ to increase by around 12%, faster than the regional rate of 6%⁴². In addition to this growth in population the overall age profile will 'age', as is the case with the rest of the UK. In 2026, 10,300 of the population will be aged over 65, representing an increase of 45%. It should also be noted that people aged 85 and over will have increased by 112% in the borough by 2026, from 2,500 to 5,300.

This will inevitably have an impact in many ways, for example the provision of health and care services and the demand for housing of different types. It should also be noted that growth in the borough's population aged 0 to 15 is reliant on the on-going in-migration of families and children as the local housing stock grows. Without this housing led population flow, the number of children in the borough will fall.

According to latest estimate⁴³, the majority of people (91.8%) are from white British ethnic groups, which is higher than the regional average (84.1%). Approximately 6% of the population are from black and minority ethnic groups, representing a modest increase on the Census 2001 figure of 5%.

Worklessness

In Telford & Wrekin levels of worklessness are around the same as for the Region as a whole. In 2006/07 around 13.0% of the working age people in the borough are in receipt of out-of-work benefits, compared with the regional average of 13.4%⁴⁴. This level has remained constant since 2004. The proportions of the working age populations who are economically inactive are also similar. Of Telford & Wrekin's working age population 22% are economically inactive, compared to 22.9% regionally.

The highest proportion of those people claiming benefits (48%) are on incapacity benefits, which is similar to the average regional figure (47%). Other significant proportions of those claiming benefits are either job seekers (15%), lone parents receiving income support (16%) or disabled (8%).

⁴¹ This growth is the projected growth from 2006 to 2026

⁴² ONS Population projections are trend based, taking account of historic patterns of migration and natural change. However, they do not take future agreed house building targets (as set out in the RSS) into account. This may mean that they paint a misleading picture of the scale of future growth and how the population structure will change. Nevertheless, they are the only consistent source for future population trends.

⁴³ Source: ONS 2005 mid-year population estimates (experimental)

⁴⁴ Source: DWP working age client group benefits, ONS mid-year population estimates, August 2006 – May 2007

Telford & Wrekin is part of the Birmingham, Coventry & Black Country City Region City Strategy Pathfinder and is therefore eligible for funding to target long-term worklessness. The original plan was to develop 2 Neighbourhood and Skills Plans (NESPS) for Malinslee and Donnington wards. With the current focus on worklessness, a further 5 Neighbourhood and Skills Plans (NESPS) have been developed in the following deprived wards; Brookside, Cuckoo Oak, Hadley & Leegomery, Madeley and Woodside⁴⁵. The programme aims to deliver an integrated employment and skills approach to engage or re-engage those furthest from the labour market, including the long-term unemployed and those on welfare benefits.

Skills

Skills levels in Telford & Wrekin, as measured by qualifications are lower than the regional average. At the lower end of the achievement scale, a smaller proportion of the working age population (14.8%) have no qualifications, compared to the regional average of 17.5% (Figure 10.9). However, the proportion of the working age population with higher level qualifications (20.9%) was below the regional average of 23.9%, and has fallen by 2% since 2005⁴⁶. This possibly reflects the concentration of semi- and unskilled occupations in the borough.

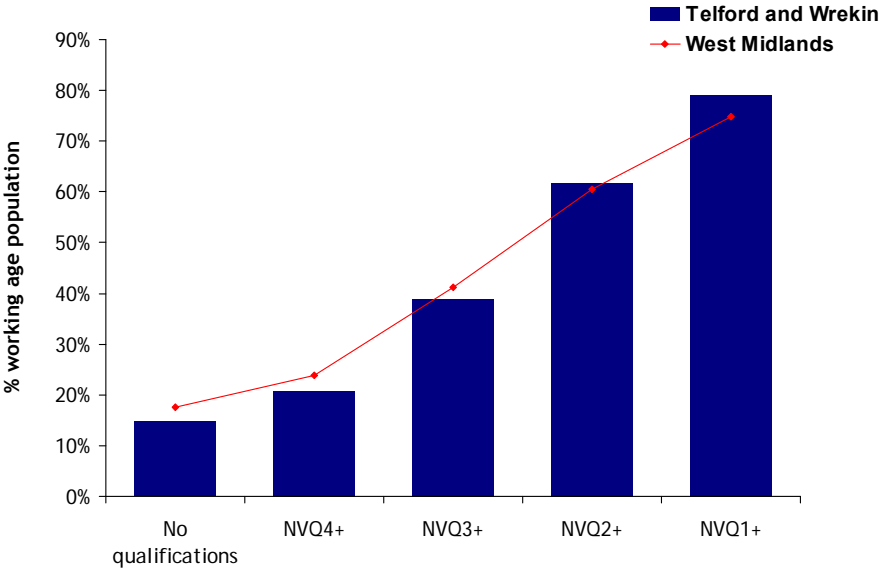
In terms of the working population, over a third (35.6%) had no qualification in English and 40% had no qualification in Maths in 2005.⁴⁷ These rates are both higher than the regional averages of 32.7% for English and 37.1% for Maths. With regards to increasing skills, the percentage of the borough's workforce receiving job-based training has increased marginally (0.8%) to 17.2% in 2004/2005, compared to 16.4% in 2001/2002. This rate is above the regional rate of 14.6%.in 2004/2005. However, as already discussed above, there continues to be significant pockets of deprivation in education, skills and training within the borough, particularly in Woodside, which is the most deprived district.

⁴⁵ TELFORD & WREKIN COUNCIL CITY STRATEGY – WORKLESSNESS PROGRESS REPORT (May 2008)

⁴⁶ Source: Annual Population Survey, 2006

⁴⁷ Source: West Midlands Regional Lifestyle Survey (2005)

Figure 10.9: Working age qualification levels for Telford and Wrekin and the West Midlands region, 2006



Source: Annual Population Survey, 2006

Educational attainment within schools in Telford & Wrekin has been rising. For example, attainment at Key Stage 4 has continued to increase from 2001. In 2007 40.8% of the Borough’s 16 year olds achieved five or more A* - C GCSE passes compared to 39.4% in 2006, (including Maths & English). There is also a consistently higher percentage of 3 and 4 year olds in education than either the regional or national averages.

As discussed in the worklessness section, 7 of the most deprived wards in Telford and Wrekin have Neighbourhood and Skills Plans (NESPS)⁴⁸. The funding and delivery of the plans aims to provide individual tailored support packages to assist with learning and the achievement of qualifications, securing employment and ongoing support. Funding initiatives such as this should help to improve the skills levels amongst some of the most deprived areas.

⁴⁸ TELFORD & WREKIN COUNCIL CITY STRATEGY – WORKLESSNESS PROGRESS REPORT (May 2008)

Health

In general, the health of the population in Telford & Wrekin is good. People in the borough generally live longer than the average person in the Region as whole. Life expectancy is 77.6 years for males and 80.8 for females, compared with 76.2 years and 80.8 years respectively in the Region. However, there are several pockets of poor health in the borough. Five LSOAs are within the 10% most health deprived areas in England⁴⁹. These are located in Telford Central and Telford South. The most deprived LSOA was in Woodside located in Telford South. A further 20 LSOAs are within the 10-20% most health deprived areas in England, with the majority of these located in Telford South. Reducing health inequalities between deprived and more affluent areas is therefore a key to improving the overall health and well-being profile of the Borough. However, with a growing and ageing population and the rising costs of care, there is also an increasing need for provision of adult social care and health services.

Premature mortality rates in the Borough usually relate to cancer and circulatory diseases. These rates both declined between 1998-2000 and 2003-2005. The rate for cancer fell by 17.9% to 125.8 per 100,000 population and the rate for circulatory disease fell by 28% to 105.8 per 100,000 population, although this figure remains above the national rate. Similarly, death rates from heart disease and stroke are significantly higher than the national rate. Infant mortality rates showed a significant decrease in the borough between 1998-2000 and 2002-2004, (7.5 to 4.4 respectively). In 2003-2005 there was a slight increase to 4.8, which was similar to the national rate⁵⁰.

Adult Obesity in Telford & Wrekin is slightly higher than the regional rate (18.7% and 15.8% respectively). Just over a fifth of males aged 18+ were estimated as clinically obese compared to the West Midlands rate of 16%. Similarly, Telford & Wrekin also has a higher proportion of females (17.2%) classified as obese than in the Region (15.6%) as a whole³⁶. Overall, it is estimated that 78,000 people (aged 16+) in the borough are either overweight or obese. This is equivalent to nearly 60% of the aged 16+ population. The prevalence of adult obesity is greater in the more deprived neighbourhoods of the borough. However, as elsewhere this issue needs to be addressed to control the future pressures on the health services.

In 2006, information from the weighing and measuring programme of reception and year 6 pupils in the borough's schools found that 11.9% of reception children and 19.4% of year 6 children were classified as obese. The percentage relating to reception children was below the national average (12.5%) but the percentage relating to year 6 children was marginally above the national average (19.1%).

⁴⁹ IMD 2007, CLG

⁵⁰ State of the Borough report, October 2007

Alcohol misuse is a problem which impacts not only on health but on other issues such as domestic violence, criminality and homelessness. Although Telford & Wrekin figures (2005) on binge drinking are slightly lower than the regional average, over 34% of males are classified as binge drinkers compared to 16.4% of females. This represents a total of around 30,000 individuals. Around three quarters of respondents to the Community Panel Survey (2006) in the borough cited underage drinking as the second biggest concern in their neighbourhood. Telford & Wrekin Safer & Stronger Communities Partnership (SSCP) has developed an alcohol strategy⁵¹ in response to growing concern about alcohol misuse. The overall responsibility for the delivery of the Strategy will be with the Drug and Alcohol Action Team, within the Safer & Stronger Communities Thematic Partnership, and the overall vision for the strategy is "To promote safe, sensible drinking in Telford & Wrekin and to reduce the harm caused by alcohol misuse".

In Telford & Wrekin over a quarter (26.1%) of the population aged 18+ smokes. This is 4 points higher than the average regional rate of 21.9%. The 2005 West Midlands Regional Lifestyle Survey found that 57.3% of smokers in Telford & Wrekin would like to give up, which is similar to the regional rate of 58.5%.

Drug misuse is also a serious issue for the borough, particularly as there is a growing number of 'new' cases, especially amongst children. Recent research estimates that there are 760 opiate and crack users aged 15-64 within Telford & Wrekin and 810 non-opiate and crack users. During 2006/07, 681 people were treated for drug misuse within the borough, with 243 of these (36%) being 'new' cases. In 2006/07, 102 children (under 18) were treated for drug misuse and 87% of these individuals were 'new' cases.

In 2005, 20.6% of the adult population of residents in the Borough were participating in the recommended weekly level of physical activity set by the Government⁵². The main reason for not undertaking more physical exercise was attributed to lack of time (36.7%)⁵³. Family commitments, illness or disability and the cost of facilities were seen as obstacles by around a fifth of residents.

Over the next 20 years in view of Telford & Wrekin's ageing population, one of the main challenges will be helping vulnerable people to live safely and independently in their own homes. The number of pensioners and vulnerable people living on low incomes in the borough is already a real concern, as this has an adverse affect on their health and welfare. In common with other areas of the Region, there needs to be an ongoing improvement of the range of alternative services to provide care and reduce the dependency on traditional residential services.

⁵¹ 'Safe, Sensible & Social, Telford & Wrekin Prevention of Alcohol Misuse and Harm Reduction Strategy', March 2008

⁵² Active People Survey 2005

⁵³ West Midlands Regional Lifestyle Survey 2005

Crime

Overall, crime levels in Telford & Wrekin declined by 22.4% between 2004/05 and 2007/08. In 2006 there were 8.4 notifiable offences per 100 people in Telford & Wrekin, which was lower than the Region as a whole (9.5 per 100 people). The borough had the 6th best score out of the 14 authorities in the Region. The highest proportion of offences related to criminal damage, including arson (2.4 per 100 people)⁵⁴.

In Telford & Wrekin, there were only 1.7 notifiable offences per 100 population relating to violence against the person, which was also below the regional figure of 2.0 per 100 population. Within the borough, alcohol is a very significant factor in violent crime, including domestic violence and reflects local concerns about drunk and disorderly behaviour. Domestic violence accounts for almost a quarter of all recorded violent crime in the borough. The violent crime rate per 1000 population has however, decreased by 31.8% between 2003/04 and 2005/06. This is significantly better than the average regional decrease of only 5.8%⁵⁵.

In the past 2 years, the year-on-year incidence of domestic burglaries has fallen. Between 2004/05 and 2005/06 there has been the significant decrease of 26.9% per 1000 population. Similarly, the rate of vehicle crime has decreased by 20% per 1000 population since 2003/04. In contrast, there has been a considerable increase of racially aggravated crime (assault or injury) per 1000 population. Since 2002/2003 this has risen by 200%⁴¹.

⁵⁴ Notifiable Offences Recorded by the Police, 2006/2007

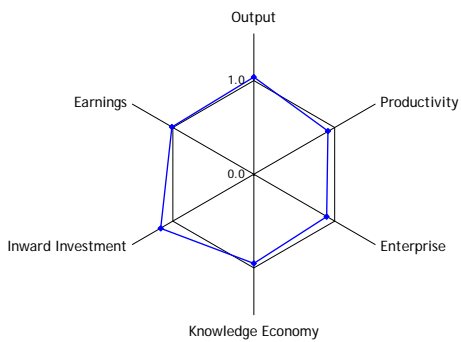
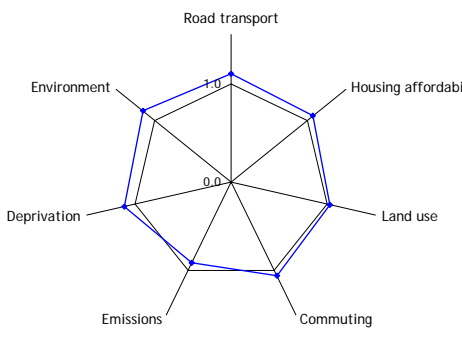
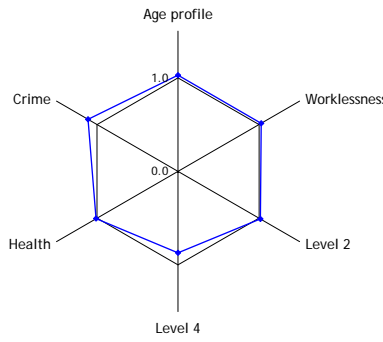
⁵⁵ Source: State of the Borough report, October 2007

6 Conclusion

This local area profile forms part of the Regional Integrated Economic Assessment (RIEA). The primary focus of the RIEA is the synthesis of existing data and evidence across the range of themes and local areas. The RIEA constitutes an important **first step** in the longer term iterative development of the evidence base for the single integrated regional strategy.

More detail about the range of thematic areas covered in this profile can be found in the thematic chapters which form part of the RIEA. These cover the position at regional level and make comparisons between different parts of the region. The overarching regional summary section of the RIEA draws together the key messages relating to each of the themes to provide an overall assessment of the state of the regional economy and the issues which impact upon it.

A summary of some of the key findings from the local area profile can be found overleaf. This incorporates a series of radar charts which are explained on the following pages.

Economic Structure & Output	Communities & Connections	The People of Telford and Wrekin
<p>Key business indicators for Telford & Wrekin</p>  <p style="text-align: right; font-size: small;">West Midlands Regional Observatory 2008</p>	<p>Key place indicators for Telford & Wrekin</p>  <p style="text-align: right; font-size: small;">West Midlands Regional Observatory 2008</p>	<p>Key people indicators for Telford & Wrekin</p>  <p style="text-align: right; font-size: small;">West Midlands Regional Observatory 2008</p>
<ul style="list-style-type: none"> • GVA per head for Telford and Wrekin increased from £12,122 in 1995 to £16,457 in 2005, an average annual increase of 3.1%, significantly below the regional growth of 4.5%. • GVA per employee stood at £32,979 in 2005, compared to a regional average of £35,696. • In Telford and Wrekin, the rate of VAT registrations per 10,000 is lower than the regional average. Latest estimates are 31 registrations per 10,000, compared with 34 per 10,000 for the West Midlands Region. • In 2006 estimated employment in knowledge-intensive sectors within Telford and Wrekin was just over 35,500 an average increase of around 6% per year between 2000 and 2006 compared to just under 3% per year regionally. • 48% of employees in Telford and Wrekin work for a firm with overseas owners, which is the third highest rate in the region. • Median wages in Telford and Wrekin stood at £433 per week in 2007, slightly higher than for the region as a whole. 	<ul style="list-style-type: none"> • There was an estimated 8,300 vehicle kilometres per head in terms of road traffic flow in 2006, representing a 0.5% decrease compared with 8,340 in 2002; • The lower quartile house price in the borough is currently just over 6 times the lower quartile income (2007). This ratio is marginally below the regional average (6.86); • In 2006/07, around 87% of new homes in Telford & Wrekin were built on previously developed land compared to the regional average of 84%; • Data from ONS from 2005 shows that the workplace based workforce of Telford & Wrekin was 1% smaller than the residence based workforce. This indicates a very small net out-commute; • In 2005, CO₂ emissions from Telford & Wrekin were estimated as 8,100kg per person, compared with 7,400kg per person across the Region as a whole; • The borough has 6 lower level super output areas (LSOAs) in the top 10% most deprived nationally, representing 5.6% of the total LSOAs in Telford & Wrekin. 	<ul style="list-style-type: none"> • The population of Telford & Wrekin is younger than the regional population: there are more people of working age and fewer older people than is the case regionally. • Rates of worklessness in Telford & Wrekin are around the regional average, but there are pockets within the borough where concentrations of worklessness exist. • Skills levels in Telford & Wrekin are lower than the regional average. While a relatively low proportion has no qualifications, the proportion of people with higher level qualifications is also low. • The health of the population of Telford & Wrekin is generally good and life expectancy is higher than the Region as a whole. There are however pockets of poor health within the borough • Recorded crime levels are declining, in line with regional trends. Rates in Telford & Wrekin are slightly below the regional average.

Appendix A - Using Radar Charts

A radar chart, also known as a spider chart or star chart because of its appearance, plots the values of each indicator along a separate axis. Each axis starts from the same point in the centre of the chart and ends on the outer ring.

Radar charts are useful when you want to look at several different indicators all related to one item. In our analysis the factors are all related to the regional figure for the West Midlands Region for each indicator.

In our analysis we use a radar chart to present data about a particular broad theme for each local authority area. In the report charts, all the variables have been measured relative to the regional average. A rating of more than 1 indicates the local area is performing better than the region as a whole, while a rating of below 1 indicates the local area is performing worse than the regional as a whole⁵⁶. This means that for some indicators (denoted by an asterisk in the list below), a high value of the indicator will lead to a rating below 1 and a low value will mean a rating above 1.

Reading along the axes, if the indicator for the local authority is below 1 the point on the chart will be inside the middle ring. If the indicator for the local authority is above 1 the point on the chart will be outside the middle ring.

The resulting radar chart will graphically show areas of relative strength and relative weakness, as well as depicting general overall performance. The charts use the following indicators:

Business

Output - Gross Value Added per Head (2005, ONS Regional Accounts)

Productivity - Gross Value Added per Employee (2005, ONS Regional Accounts and Annual Business Inquiry)

Enterprise - VAT registrations per 1000 population (2006, BERR Small Business Service Analytical Unit)

Knowledge Economy - Percentage of workforce employed in knowledge intensive services (2006, ONS Annual Business Inquiry)

Inward Investment - Proportion of employees working in foreign-owned businesses (2006, ONS Inter-Departmental Business Register)

Earnings - Median earnings of people working in the area (2007, ONS Annual Survey of Hours and Earnings)

⁵⁶ Except for indicators where there it is not clear whether a high or low value is better, in which case figures above 1 represent a higher value and below 1 a lower value. This relates to the indicators of Inward Investment, Commuting & Age Profile.

Place

Road Transport - Total road traffic flow per head of population* (2007, DfT Road Traffic Statistics)

Housing - Housing affordability index (ratio of lower quartile house price to lower quartile income)* (2007, DCLG)

Land use - Percentage of housing completions on previously developed land (2006/07, DCLG)

Commuting - Net commuting as percentage of the total workforce (2006/07, ONS Annual Population Survey)

Emissions - Carbon dioxide emissions per head of population* (2005, DEFRA Local and Regional Estimates of Carbon Emissions - End User Basis)

Deprivation - Percentage of LSOAs in the area which are **not** in the 10% most deprived nationally (2007, DCLG Index of Multiple Deprivation)

Environment - Percentage of surveyed areas with acceptable levels of litter and detritus (2005/06, DCLG BVPI Local Street and Environmental Cleanliness Indicator)

People

Age profile - Proportion of the population who are of working age (2006, ONS Mid-year Population Estimates)

Worklessness - Percentage of the working age population who are on out-of-work benefits* (2006-07, DWP Working Age Client Group)

Level 2 - Percentage of the working age population qualified to at least level 2 (2006, ONS Annual Population Survey)

Level 4 - Percentage of the working age population qualified to at least level 4 (2006, ONS Annual Population Survey)

Health - All age, all cause mortality rate* (2006, National Centre for Health Outcomes Development)

Crime - Notifiable offences recorded by the police per head of population* (2006/07, Home Office Notifiable Offences Statistics)

* Low values for this indicator are >1 and high values are <1

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