Final report

Much more than trees 2:
Measuring the social and economic impact of
The National Forest
2004

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Executive summary and headline indicators

This document represents the Final Report of a project commissioned by the National Forest Company (NFC) to complete a periodic review and update of work undertaken in 2001 on the social and economic impact of The National Forest. This 2004 Study has been completed by the Centre for Economic and Social Regeneration at Staffordshire University. The project aimed to:

- establish a clear view of key trends in the National Forest area;
- provide an improved basis for the periodic future assessment of the socio-economic impact of the Forest over time;
- make a judgement on the impact of the Forest in terms of a range of core social and economic indicators; and,
- contribute to the developing remit and objectives of the NFC, and to deliberations and debate on the revised National Forest Strategy and the future progression of the initiative.

The programme of activity undertaken by the Centre has drawn together evidence from a wide range of sources on the development of The National Forest in terms of its impact on social and economic activity within the defined geographical area. This has sought to describe the changing economic profile of the Forest area and, where possible, to identify the direct and indirect effects of the creation of the National Forest. Information is principally from secondary sources but does include specific survey work on the direct impact of expenditure by the NFC. In assessing the socio-economic impact of The National Forest, the Centre has recognised the limitations of the data available and that the activity of the NFC is only one amongst a number of factors that potentially influence the economic environment and social climate within the Forest area.

The collation and analysis of secondary data sources has been complemented with a survey of 'key decision makers and influencers' in the Forest area. This involved interviews with senior individuals - such as local authority and inward investment agency chief executives - to explore their views on the past, present and future social and economic effects of The National Forest. The Centre has also identified a number of headline indicators which give a broad profile of the socio-economic health of The National Forest (Table 1).

Table 1: Headline indicators

Indicator	Performance
Total number of people living in The National Forest area (2001)	200,047
Percentage change in total population (1991-2001)	+4.5%
Percentage increase or decrease in the number of local jobs (1991-2001)	+4.1%
Proportion of the working age population who are unemployed (March 2003)	1.2%
Proportion of the population who live in wards that rank within the most deprived 10%; and 25% wards in the country (IMD 2000)	5%; 26%
Percentage of households without access to a car (2001)	22.4%
Average property price (2002)	£114,765
Total number of VAT registered businesses in the area per 10,000 population (2001) compared with East Mids (266) and West Mids (258)	297
Day visitors per annum (2002)	4,600,000
Average spend per visitor (2002)	£33.24
Jobs created and safeguarded in forestry, nurseries and contractors and landscaping (1995-2003)	144.5
Jobs safeguarded and created through the National Forest Tender Scheme (1995-2003)	68.3

NB. For details of how the indicators are calculated refer to main report

The profile of The National Forest in 2004

Following the analysis of data series, we have been able to generate summary points on the broad nature of The National Forest area profile.

The following characteristics and trends may be identified:

- a population of 200,047 people, roughly equally split between males and females;
- an age structure similar to England and Wales, though with a slightly smaller 25-44 age group;
- a very small population from black and minority ethnic groups but with some significant concentrations such as in Burton upon Trent;
- an expanding population, increasing marginally more quickly than the national average;
- growing employment rates, above regional and national averages;
- a changing employment structure, with growing numbers of jobs in sectors such as forestry, construction, tourism, finance and services - and declining employment in manufacturing, transport and communications;
- an increasing number of jobs, well above regional averages;
- levels of self-employment in line with regional and national averages;
- an occupational profile oriented towards manual trades, likely to be a reflection of the area's still significant manufacturing and construction sectors;
- falling unemployment, particularly amongst males, to levels below regional and national averages;
- a significant fall in long term unemployment, further below regional and national averages;
- average earnings below regional averages, with male earnings in particular failing to keep pace with earnings growth in recent years;
- pockets of deprivation, particularly in the inner areas of Burton upon Trent and the coalfield communities of North West Leicestershire and South Derbyshire;
- overall levels of benefit dependence below regional averages and declining more quickly than the regional averages;
- health levels similar to regional and national averages, though slightly poorer for males than females;
- real (hidden) unemployment substantially above official figures, but also showing evidence of improvement;
- car ownership and multiple car ownership above regional and national averages;
- growing numbers of businesses with rates per 10,000 population above regional and national averages; and,
- evidence of high levels of public and private investment through regeneration projects and programmes.

The National Forest profile thus emerges as an area that, whilst constrained by some of the characteristics of traditional agricultural or mining communities and their economic and social needs, does not particularly reflect such needs. In general terms – there is little evidence of the widespread socio-economic problems – such as low entrepreneurship, high unemployment, or housing market failure – that are often associated with former coalfield areas. The National Forest has a relatively healthy socio-economic profile, performing well in comparison with the East and West Midlands regional averages. Levels of earnings would possibly be the only area of real concern. There is evidence of pockets of deprivation relating to the decline of traditional industries within the Forest area – including inner areas of Burton upon Trent and particular coalfield communities within South Derbyshire and North West Leicestershire. Moreover, hidden unemployment is evident.

Yet, in general, the picture is relatively positive, particularly in comparison with other former coalfield areas such as South Wales and South Yorkshire. Though the Studies are not always directly comparable, it is apparent that the positive progress found in the 2001 Study has been maintained.

Direct and indirect effects of actions initiated by The National Forest

Aside from establishing the social and economic profile of The National Forest, it is possible, even at this relatively early stage in the development of the actions initiated by the National Forest Company, to tease out some direct and indirect effects. Direct effects refer to outcomes that are directly attributable to The National Forest and the actions of the National Forest Company; indirect effects are outcomes where there is a less demonstrable but nonetheless discernible or arguable relationship between an element of change and the existence of The National Forest. That said, it must be noted that, in many instances, the effects of The National Forest are likely to be one of a range of factors operating at any particular time.

The National Forest has already contributed significantly to:

- the nurturing of a more positive outlook within businesses and communities located within the Forest area, and a vision for its future sustainable regeneration;
- employment creation and safeguarding of jobs in sectors directly related to the NFC's role – including forestry, conservation and tourism;
- employment creation and safeguarding amongst beneficiaries of the National Forest Tender Scheme;
- a growing investment in the local economy via the National Forest Tender Scheme; where,
- from qualitative evidence, it seems clear that National Forest actions have directly supported diversification and contributed to the survival of some farms in the area; and,
- success in securing external funding for particular Forest-related projects from a range of sources.

In addition, there is evidence of less direct effects. These include:

- some limited evidence as yet, on the emergence of a healthier property market in terms of house prices than is likely to have been the case without The National Forest;
- a continued predominance of day visitors, accompanied by a growth in bed nights per annum, probably associated with an increase in holiday and business visits; and,
- a growth in average spend per visitor, arising from an increasing day visitor spend.

Some key viewpoints on The National Forest

Part of the work completed for *Much more than trees 2* involved qualitative survey work with a selection of 'key decision makers and influencers' whose professional activity involves The National Forest in some significant way. This supplementary material provided some useful insights. In essence, the outcomes from this were as follows.

The social and economic impact of The National Forest

- there is a general and wholly expected view that it is early days for isolating the wider social and economic impact of The National Forest;
- however, there are also widely recognised early effects, and positive expectations amongst key player agencies and organisations. In essence, The National Forest is seen as generating a *"unifying vision for what the area could become"* , as well as making good progress in planting against challenging targets that will have an important outcome for community and business development;

- where the planting regime has generated substantive visible change, there tends to be an extremely positive reaction from all sides;

- discussion with community development workers revealed a positive reaction where the planting so far is viewed as raising the profile of the area, and providing leisure related facilities for local needs;

- where there have been substantive works to tackle the scars of former mining land, local communities tend to recognise the improvements;

- it is believed that image and credibility have been important positive outcomes, with an enhanced profile for places within The National Forest;

- there is wide recognition of the Forest development by businesses, and this is revealed in marketing as much as in reflections;

- National Forest Company actions are, it is argued, supporting the viability of the agricultural base within the Forest area, or alternatively easing the diversification route;

- elsewhere within the private sector, there is a recognition that the development schemes linked, for example, to housing, have created an environment in which innovative planting approaches have been fostered;

- local government recognise the social and economic value of The National Forest on various levels – not least as a mechanism for building a visitor economy in areas that have perhaps underachieved in this sector in the past;

- there are also less obvious or overt social and economic effects that would be difficult to identify from data series at any time. For example, the National Forest Company is viewed by many as a catalyst and purveyor of professional support; and,

- regeneration spin-offs are also widely recognised through stimulation as a consequence of The National Forest 'catalyst'.

Future expectations

- The National Forest project represents another facility in the armoury of features that will be used to market and sell its constituent areas;

- as the planting matures, then there is every expectation of greater impacts to be precipitated by the Forest;

- this will help to further eradicate perceptions of the derelict, former mining landscape. More visitors are likely, and it is anticipated that more tourism developments will generate longer stays and overnight visitors; and,

- property agents and developers perceive substantial long-term benefits; increased attractiveness will enhance the housing market, providing a foundation for regeneration.

Actions to sustain the social and economic impact

- The National Forest is widely recognised as a long-term initiative that needs ongoing actions to realise its social and economic potential;

- stronger community involvement was cited as a need by some of those consulted, particularly where the greatest rate of change is occurring;

- the sustainability of effects requires the development of supporting infrastructures, whether in transport, tourism, or other areas; and,

- there is wide acceptance of the need to encourage the development of forest-based visitor activities, in particular attractions that will generate income, in order to maximise the potential of the visitor economy.

Other emergent themes

- those consulted during this phase of the impact research were universally positive about the quality of the National Forest Company and its activities;

- in terms of environmentally friendly business development, the Forest could, according to some commentators, prove to be a "*shop window of how it should be done*"; and,

- there is also the issue of the emergent and strengthening partnership that has been precipitated by the initiative. The National Forest initiative has brought local authorities and others together, and provided a forum within which a solid partnership has evolved.

Some comparisons between the 2001 and 2004 Report findings

In summary, the 2001 Report concluded that The National Forest area revealed: above average population growth; a buoyant housing market; low unemployment; generally below average levels of social deprivation; falling fertility rates and rising death rates but expected inward migration; stable levels of those in the primary school age categories; more manufacturing and fewer service jobs that the national average; and with tourism of growing importance to the local economy (The National Forest: Social and Economic Impact Study, UDRES Report 51, Derby, January 2001, p25).

The 2004 Report has been able to focus on a much wider range of issues and indicators, and to explore the fine detail of The National Forest social and economic profile. Moreover, there are substantial technical constraints in making comparative assessments. However, there is some value in drawing some basic comparisons with the late 1990s position recorded in 2001. These show that many of the trends identified in 2001 have continued, albeit with some positive signs of improvement. The National Forest area: continues to record above-average population growth; maintains its status as a relatively healthy residential property market; remains a low unemployment area in terms of registered claimants; has a slightly above-average growth in younger age categories, and, whilst still focused on manufacturing rather than service trades, has a relatively high service sector employment growth rate, and reveals itself as a growing focus of visitor demand within an expanding tourism and leisure economy.

Conclusion

In the Report we have been able to set out a detailed profile and assessment of The National Forest area and to identify some of its early social and economic effects. A series of robust indicators aligned to government statistical collection and recommendations have been established and, in most cases, presented in the preceding sections.

The establishment of a picture of community and business within The National Forest area will undoubtedly contribute to the developing remit and objectives of the NFC. It will provide a background to future decisions and ultimately a benchmark against which to appraise, assess and evaluate the achievements of The National Forest. Qualitative survey findings have allowed us to report a range of constructive comments that might be considered in future strategy and decision-making, and the debate that will follow the publication of the Report will, we anticipate, generate ideas and implications for future policy. The general view is that The National Forest is well on course to create a major step change for its area and to build from what has clearly been a positive and promising start.

1.0 Introduction and context

1.1 The Final Report

This document represents the final report from a project commissioned by the National Forest Company (NFC) to complete a periodic review and update of work undertaken in 2001 on the social and economic impact of The National Forest. This 2004 Study has been completed by the Centre for Economic and Social Regeneration at Staffordshire University.

In this Section, we outline the Project context and brief as specified by the National Forest Company. In Section 2, we discuss the aims and outcomes of the Project, together with the limitations of the work. Section 3 describes the methodology adopted in the research, including the research approach, selection of indicators and the limitations and challenges of data collection.

Sections 4 to 12 outline and interpret the findings for each of the indicators grouped into themes, as follows: Demographic profile; The workforce; Deprivation; Housing; The economy; Tourism; Forest-related education and training; External funding; and, National Forest Company activity. Section 13 summarises the views of key decision makers in The National Forest who were interviewed as part of the project.

Section 14 provides a summary and explanation of the findings, in terms of the profile and indirect and direct indicators of the impact of The National Forest. Annex 1 contains a map of the Forest area and Annex 2 gives further details of the socio-economic indicators employed in the Study. Annex 3 contains a ward list indicating population proportions within the Forest area. Annex 4 provides details of the survey of key decision makers, including the questionnaire employed and a list of respondents.

1.2 The Project context and brief

The National Forest is one of the Country's most ambitious environmental initiatives exemplifying sustainable development. It is transforming 200 square miles of the Midlands and includes parts of Derbyshire, Leicestershire and Staffordshire. The area encompasses a variety of landscapes including the ancient forests of Needwood and Charnwood and parts of the industrialised Midlands Coalfield and Trent Valley (see Annex 1). The aim of the NFC is to create a mosaic of land uses and activities, framed by 33% woodland cover, that will enhance the environment and economy of the area and improve the quality of life for residents.

In 1994 the Government established the National Forest Company, sponsored by the then Department of the Environment, to implement the Strategy. The Company is now sponsored by the Department of Environment, Food and Rural Affairs. Woodland cover has increased from 6% to 15% of the area and visitor facilities, both new and improved, public access, community participation and other public benefits are growing rapidly year on year.

The Forest aims to fulfil environmental, social and economic objectives, for present and future generations, bringing a wide range of benefits for local people, the UK as a whole and for the world environment:

- To create a diverse landscape and enhance biodiversity.
- To make a significant contribution to the UK's efforts to reduce atmospheric carbon dioxide.
- To create a major resource for tourism, recreation and education.
- To provide a productive alternative use for farmland.
- To make a contribution to the UK's timber needs.
- To stimulate the economy and to create new jobs.

The NFC recognises the importance of assessing the social and economic impact of the Forest on a regular basis. Work was first undertaken in 2001 and a report 'Much more than trees: The Social and Economic Impact of The National Forest' was produced. In April 2003 the Centre for Economic and Social Regeneration was appointed to review and update this work, publishing their findings in 2004.

2.0 Aims and limitations

2.1 Introduction

The programme of activity undertaken by the Centre has drawn together evidence from a wide range of sources on the development of The National Forest in terms of its impact on social and economic activity within the defined geographical area. This has sought to describe the changing economic profile of the Forest area and, where possible, to identify the direct and indirect effects of the creation of the National Forest. Information is principally from secondary sources but does include specific survey work on the direct impact of expenditure by the NFC.

The work has been designed to not only elicit ideas on the regeneration achievements of the initiative but, also to identify the challenges and opportunities that are evident from the impact assessment. In the latter sense, the proposed work has included an element of interpretation and, in conjunction with NFC colleagues, discussions on the implications of emergent trends, identifiable gaps and opportunities that could be within the remit of the Forest initiative.

2.2 Outcomes

At the outset, it was specified that the Project would:

- establish a clear view of key trends in the National Forest area;
- provide an improved basis for the periodic future assessment of the socio-economic impact of the Forest over time;
- make a judgement on the impact of the Forest in terms of a range of core social and economic indicators; and,
- contribute to the developing remit and objectives of the NFC, and to deliberations and debate on the revised National Forest Strategy and the future progression of the initiative.

2.3 Limitations of approach

In assessing the socio-economic impact of The National Forest, the Centre has recognised that the activity of the NFC is only one amongst a number of factors that potentially influence the economic environment and social climate within the Forest area. Such factors take many and diverse forms, for example, national patterns of migration, the impact of other policy initiatives in the former coalfield areas, the effects of Foot and Mouth Disease on the visitor economy, trends in inward investment and the general health of the national economy.

The majority of data available to the Centre was drawn from secondary sources and thus could not always be used to demonstrate the impact of The National Forest, but rather provided a snapshot of the area in terms of, for example, population and employment. That said, it was possible to draw selected conclusions about some of the effects using available indicators. The value of monitoring a socio-economic picture of the Forest area is derived as it becomes possible to consider changes over time and comparisons with other areas.

This socio-economic study is intended to complement the range of other monitoring and evaluation that the NFC undertakes in order to assess the impact and effectiveness of its activities.

3.0 Methodology

3.1 Preliminary work

In this stage of the work the Project Team undertook a review of current approaches and good practice in the monitoring of socio-economic impacts of forestry and other comparable developments. This included an assessment of the strengths of the previous NFC research, assessing its basic conclusions and the degree of replication advisable in terms of its method and approach.

3.2 Selection of indicators

The Project Team reviewed the indicators used in the previous study, assessed developments in monitoring and data availability and made recommendations for indicators to be included in the new study.

In selecting indicators for the 2004 Study, it was understood that the NFC was seeking:

- to demonstrate the impact of its activities wherever possible, but also to create a basis for monitoring the changing socio-economic profile of the Forest area;
- continuity in indicators where applicable in order to permit the identification of trends over time;
- a smaller range of measures, possibly including the identification of a number of 'headline indicators'; and, where possible,
- to reflect established regional and national indicators.

Review of the 2001 Study

The Project Team reviewed the indicators used in the NFC's Social and Economic Impact Study, undertaken in 2001 by the University of Derby. This was the first study of this nature and inevitably uncovered a range of data collection challenges. The 2004 Study has sought to build upon this work and learn from the experiences gained.

Developments in monitoring and data availability

In the period following the publication of the 2001 Study, there have been a number of developments in the monitoring of socio-economic impacts, including the following:

- publication of the initial tabulations from the 2001 Census of Population;
- development and adoption of the 'Index of Multiple Deprivation' as the most widely used and accepted measure of deprivation;
- creation of Quality of Life (QoL) and Economic Regeneration (ECR) indicators by the Audit Commission – these are expected to be widely adopted, particularly amongst local authorities; and,
- ongoing and emergent research into forest and rural indicators, particularly following the introduction of the Community Forests, assessing their impact against a range of objectives, by organisations including the Countryside Agency and Forestry Commission.

Many of these developments have sought to standardise the measurement of impacts and enable greater comparability between areas.

The selection of indicators for the 2004 Study

Indicators were selected from a range of sources, including those used in the previous study, those set out in the Audit Commission's Quality of Life and Economic Regeneration publications, as well as various other sources. A range of criteria were used in the selection process, including:

- ease of collection, taking evidence from the 2001 Study;
- the geographical level (for example ward, district, county) at which the data is made available;
- the resources required to collect the data;
- how effectively the indicator describes the socio-economic profile of the Forest area or how well it may show any direct or indirect effect arising from the activities of the National Forest Company;
- comparability with the standardised Audit Commission indicators;
- comparability with the key indicators of the Regional Development Agencies;
- the robustness of the data source and the frequency with which it is updated; and thus,
- the capability of providing comparisons over time.

Following these considerations, a range of recommended measures were selected, together with a number of 'headline' indicators which may be used to give a broad picture of the long term social and economic impact of the Forest. The final list of indicators developed and agreed is listed in Table 2. Further details relating to the indicators selected may be found in Annex 2.

3.3 Data collection and analysis

Following agreement of the indicators to be used, work began on the data collection. This drew together appropriate data and other material in order to derive a picture of trends and achievements within the National Forest area. The majority of the data was drawn from numerous national, regional and locally published sources. Further material was collected by the Project Team from sources, such as Local Authority housing and economic development departments, as well as the National Forest Company itself. Full details of the data sources used for each indicator may be found in Annex 2.

The data was then collated and analysed by the Project Team in terms of a number of themes. Where applicable, comparisons were made with the 2001 Study and with figures for wider areas, such as regional data for the East and West Midlands.

In terms of baselines, whilst the NFC became active in 1995, the Company also uses 1991 as a baseline. This is the date when The National Forest was first conceived.

3.4 Limitations of data

Careful note must be given to the 'indicator purpose and applicability' column in Table 2. This refers to the intended use of the indicator and the motive for its inclusion in the monitoring process. Some of the indicators selected are viewed as providing only a Forest area profile, certainly in the short term, whilst others should reveal either a direct or indirect effect attributable to The National Forest. Over the long term, profile indicators may be interrogated for signs of a National Forest effect. That said, it will always be challenging to discern the effect of a particular initiative from secondary data sources that are ostensibly collected for another or more general purpose.

In this Study, the use of sources principally collected for another purpose introduces a number of limitations. The specification and level at which the variables are monitored is not necessarily that which would ideally be chosen for the task. Many of the data sources, for instance, are available at district level which does not aggregate well to National Forest boundaries, or the data is estimated at levels below district. The robustness of the data and frequency of updating is similarly constrained. In particular, at lower levels the data is sometimes drawn from relatively small sample sizes. These issues are summarised for each indicator in Annex 2.

Table 2: Summary of indicators used in the 2004 study

	Indicator	Headline indicator	Purpose and applicability
	Demographic profile		
1	Total number of people living in the National Forest area categorised by: gender; age bands; ethnicity	ü	Profile
2	Percentage change in total population by age bands	ü	Profile
	The workforce		
3	Proportion of people of working age in employment		Profile
4	Total number of local jobs by sector		Profile
5	Percentage increase or decrease in the number of local jobs	ü	Profile
6	Extent of self employment		Profile
7	Occupational profile		Profile
8	Proportion of the working age population who are unemployed	ü	Profile
9	Average annual earnings for full-timers		Profile
10	Average wages per week		Profile
	Deprivation		
11	Proportion of the population who live in wards that rank within the most deprived 10% and/or 25% wards in the country	ü	Profile
12	Percentage of population of working age who are claiming key benefits		Profile
13	Proportion of the unemployed people claiming benefit who have been out of work for more than one year		Profile
14	Income support claimants as a percentage of population (over 16)		Profile
15	Death rate by cause (Standardised Mortality Ratio)		Profile
16	Real (hidden) unemployment		Profile
17	Extent of car ownership	ü	Profile
	Housing		
18	Average property price	ü	Indirect
19	Housing completions		Indirect
	The economy		
20	GDP/head and growth in GDP/head		Profile
21	Total number of VAT registered businesses in the area per 10,000 population	ü	Profile
22	Percentage increase or decrease in the total number of VAT registered businesses in the area		Profile
23	Business formation and failure rates		Profile
24	Total number of inward investment enquiries dealt with per annum		Indirect
	Tourism (based upon HETB Study)		
25	Day visitors per annum	ü	Indirect
26	Bed nights per annum		Indirect
27	Average spend per visitor	ü	Indirect
28	Employment in tourism		Indirect
	Forest-related education and training		
29	Number of training opportunities in agriculture, environment/conservation, horticulture, forestry, catering and leisure/tourism		Indirect
	External funding		
30	Grant secured		Profile
	National Forest Company activity (based upon NFC Study)		
31	Jobs created and safeguarded in forestry, nurseries and contractors and landscaping	ü	Direct
32	Jobs safeguarded and created through the National Forest Tender Scheme	ü	Direct

The boundary of The National Forest is particularly problematic given that it extends over parts of two regions, three counties and six districts. Where data is only available at higher levels, for example, district or county, it is important to consider the weight attached to, for example, data for an individual District in the overall analysis. In some instances, such as North West Leicestershire, the Forest encompasses the majority of the District, whilst in others, such as Lichfield, it merely takes in parts of a number of outlying wards.

Where possible and feasible, data has been proportioned out according to the principles and calculations discussed below. Unfortunately it is only possible to produce district data for some indicators, due to limitations in the availability of data at local (ward) level and the production of some series as averages or percentages without access to original raw data (often where this is protected). The implication from this is simply that it will be necessary to interpret the data - and subsequent temporal changes - on such a basis in order to identify trends and circumstances that are relevant to The National Forest. For example, figures for average house price range between £100,182 and £146,093. Clearly, this represents a range of house types, styles and locational settings. Producing a Forest average for such a plethora of types would be inappropriate. Instead, the data, and future trends in such series, may be analysed and interpreted in terms of National Forest and other influences.

A key challenge in the collation of the data has been the relationship of the Forest boundary to ward boundaries, given that the majority of data sets use wards as their basis. The Forest boundary does not follow ward boundaries, thus requiring the proportioning of ward populations to determine those within the Forest area. This challenge had been addressed in the 2001 Study, however significant changes to the ward boundaries have taken place in the intervening period. Thus, in many instances the proportions of the Forest population in the border wards have had to be reassessed. This was achieved using detailed maps of the new and old boundaries, calculating the percentage area of urban/residential footprint, and applying this to the total population of the ward. It is important to highlight the fact that this will impact upon both the accuracy of the data and comparability with the 2001 Study. Details of the Forest wards and the proportioning undertaken are included as Annex 3. However, where ward level data is included for 1991, this has been calculated following the methodology employed in the 1991 Study.

It should be noted that the analysis of the 2001 Census by the Office for National Statistics has only recently been completed and there are still some outstanding issues regarding the robustness of the data in certain areas. Any revisions to the Census data could potentially affect the findings of this Study.

3.5 Qualitative data collection

In addition to the collation and analysis of secondary data sources, the Centre undertook a survey of 'key decision makers and influencers' in the Forest area. This involved interviews with senior individuals - such as local authority and inward investment agency chief executives - to explore their views on the past, present and future social and economic effects of The National Forest. A copy of the questionnaire employed may be found at Annex 4, together with a list of respondents.

This survey and analysis, designed to provide an additional attitudinal perspective, was viewed as an essential dimension to the work. It allows views on the achievements of the National Forest initiative, its future effects, and necessary actions to create a sustainable impact, to be elicited from selected key players. A selective list of representative agencies and organisations was generated in conjunction with the National Forest Company. From this, some seventeen interviews were conducted (Annex 4) providing a useful, balanced range of respondents from a mix of origins. In addition, the researchers assembled some less formal qualitative evidence from conversations with those working in and around the Forest.

4.0 Demographic profile

4.1 Population characteristics

Total number of people living in the National Forest area categorised by gender; age bands; ethnicity (Indicator 1)

Table 3: Population by gender (2001)

Gender	National Forest area		West Midlands		East Midlands		England and Wales	
	No.	%	No.	%	No.	%	No.	%
Males	98,549	49.0	2,575,111	48.9	2,048,858	49.1	25,325,926	48.7
Females	102,416	51.0	2,692,197	51.1	2,123,316	50.9	26,715,990	51.3
Total	200,047	100	5,267,308	100	4,172,174	100	52,041,916	100

Source: Census

Some 200,000 people lived in the Forest area in 2001 (Table 3). The population was split almost equally between males and females, closely reflecting regional and national figures.

Table 4: Population by age bands (2001)

Age bands	National Forest area No.	National Forest area %	West Midlands %	East Midlands %	England and Wales %
0-4	12,228	6.1	6.06	5.73	5.95
5-15	28,723	14.4	14.74	14.33	14.21
16-24	4,949	2.5	2.61	2.49	2.51
25-44	26,333	13.2	14.62	14.43	15
45-59	46,156	23.1	21.86	22.35	22.55
60-74	50,146	25.1	24.16	24.59	23.82
75 and over	31,583	15.8	15.96	16.07	15.98

Source: Census

The Forest population also reflects the age structure at regional and national level (Table 4). The under-16 population in 2001 was very marginally greater, as was the 45-59 and 60-74 age bands. The only age band difference of any note was the lower proportion in the 25-44 category.

Table 5: Population by ethnicity (2001)

Ethnicity	National Forest area		West Midlands	East Midlands	England and Wales
	No.	%	%	%	%
White	192,809	96.4	88.7	93.5	90.9
Mixed	1,362	0.7	1.4	1	1.3
Asian or Asian British	4,714	2.4	7.3	4.1	4.6
Black or Black British	652	0.3	2	1	2.3
Chinese or other ethnic group	483	0.2	0.6	0.5	0.9

Source: Census

There are some more significant differences in the ethnicity of the Forest population, particularly in comparison with the West Midlands (Table 5). At nearly 97% in 2001 it was overwhelmingly 'White', with particularly low proportions of 'Asian or Asian British' and 'Black or Black British' groups. Black and minority ethnic groups tend to be concentrated in certain areas with, for instance, a significant population in Burton upon Trent.

4.2 Population change

Percentage change in total population by age bands (Indicator 2)

Table 6: Population change (1991-2001)

Area	1991 Census	2001 Census	% change
National Forest area	**191,395**	**200,047**	**+4.5**
West Midlands	5,150,193	5,297,308	+2.3
East Midlands	3,953,269	4,172,174	+5.5
England and Wales	49,890,278	52,041,916	+4.3

Source: 1991 Census and 2001 Census

The population of the Forest area has grown during the period 1991-2001, showing an increase of 4.5% (Table 6). This is above the West Midlands average and below the East Midlands average, but similar to the national picture where the population has grown by 4.3%. However, it reflects well against some of the northern regions, particularly those closely linked to traditional and declining industries such as coal mining. It should be noted that the 2001 Study used population estimates that projected the area's population in the years between the 1991 Census and 2001 Census.

Table 7: Population change by age bands (1991-2001)

Age bands in Census 1991	National Forest 1991		England and Wales 1991	Age bands in Census 2001	National Forest 2001		England and Wales 2001
	No.	%	%		No.	%	%
0-4	12,791	6.7	6.6	0-4	12,228	6.1	6.0
5-15	26,167	13.7	13.4	5-15	28,723	14.4	14.2
16-17	4,881	2.6	2.5	16-17	4,949	2.5	2.5
18-29	33,749	17.6	18.2	18-29	26,333	13.2	15.0
30-44	41,551	21.7	21.2	30-44	46,156	23.1	22.6
45-pensionable age	37,439	19.6	19.2	45-64	50,146	25.1	23.8
Total retirement age	34,811	18.2	18.7	65 and over	31,583	15.8	16.0

Source: 1991 Census and 2001 Census

It is apparent from Table 7 that the Forest population has altered but not dramatically and very much in line with national trends. The size of the 18-29 age group has fallen by around 4% and the 30-44 has risen by around 2%. The proportion of the population aged 45-pensionable age has risen by almost 6% and slightly above the national trend. However, the total retirement age group has fallen by around 2% in line with England and Wales.

Whilst appearing unremarkable, these figures would compare favourably with other former mining areas. Typically, such areas are characterised by an ageing population as younger members of the community leave in search of work and other opportunities.

5.0 The workforce

5.1 Employment

Proportion of people of working age in employment (Indicator 3)

Table 8: Employment rate (working age) (1999-2001)

Area	Employment rate (working age) %		Employment rate (working age) Males %		Employment rate (working age) Females %	
	1999	2001	1999	2001	1999	2001
Charnwood	81.8	76.0	86.6	81.3	76.4	69.9
Hinckley and Bosworth	86.0	82.5	91.6	85.3	79.6	79.4
North West Leicestershire	77.9	81.8	83.8	87.7	71.3	75.1
South Derbyshire	76.7	82.8	84.6	88.2	68.1	76.7
East Staffordshire	72.9	84.3	79.8	88.8	65.0	79.1
Lichfield	73.1	71.7	77.8	74.5	67.3	68.4
East Midlands	75.9	75.9	80.9	80.8	70.4	70.4
West Midlands	73.5	74.3	78.6	79.1	67.8	68.9
England	74.6	75.0	79.7	80.0	68.9	69.5

Source: LFS

As Table 8 shows, at both national and regional level, employment rates have remained relatively static. In 2001, only Lichfield had an employment rate below regional and national averages.

There were large variations in employment rates between Districts in the Forest area. Charnwood and Hinckley and Bosworth have seen a decrease in rates from 81.8% to 76% and 86% to 82.5%, respectively, whilst Lichfield has seen a smaller fall. The rates for North West Leicestershire, South Derbyshire and, in particular, East Staffordshire (+11.4%) have increased.

The rates for the males and females largely mirror these trends, with the exception of East Staffordshire where employment rates among males and females rose by a large amount compared to the other Districts and the regional and national figures. Excluding Lichfield and females in Charnwood, employment rates were notably above the regional and national averages.

Although only available at district level, data on involvement in the local labour market reveals important characteristics of the Forest area. A combination of factors are apparent that either reduce involvement, such as the scale of retired groups in the area, or account for higher than average participation – such as the traditionally high activity rate amongst working class populations within conventional mining and other industrial communities.

Total number of local jobs by sector (Indicator 4)

Table 9: Local jobs by sector (1991-2001)

Area	Year	Agriculture and fishing	Energy and water	Manufacturing	Construction	Distribution, hotels and restaurants	Transport and communications	Banking, finance and insurance	Public administration, education and health	Other services
Charn-wood	1991	274	160	14816	1897	12203	2457	7139	12535	2171
	2001	266	273	14456	2795	11781	2325	7119	12799	2584
	Change	-2.9	+70.6	-2.4	+47.3	-3.5	-5.4	-0.3	+2.1	+19
Hinckley and Bos	1991	379	974	17170	1111	9103	1282	4197	5025	1617
	2001	378	1006	12002	1586	9128	1393	4830	5350	2898
	Change	-0.3	+3.3	-30.1	+42.8	+0.3	+8.7	+15.1	+6.5	+79.2
North West Leics	1991	395	312	9129	1878	8106	6317	4444	5101	1278
	2001	423	868	9786	3286	9412	6143	5219	4919	1337
	Change	+7.1	+178.2	+7.2	+75.0	+16.1	-2.8	+17.4	-3.6	+4.6
South Derbys	1991	778	254	5197	2104	4561	1220	2102	4760	825
	2001	648	308	4155	1918	4643	1318	3239	4690	916
	Change	-16.7	+21.3	-20.1	-8.8	+1.8	+8.0	+54.1	-1.5	+11.0
East Staffs	1991	550	158	11721	1877	11440	3022	7016	10028	1651
	2001	417	103	12145	2122	13958	2410	7016	12014	1578
	Change	-24.2	-34.8	+3.6	+13.1	+22.0	-20.3	0	+19.8	-4.4
Lichfield	1991	428	213	7540	1830	8602	1396	4877	8939	1672
	2001	372	300	8238	1914	9985	1752	5184	8673	1811
	Change	-13.1	+40.8	+9.3	+4.6	+16.1	+25.5	+6.3	-3.0	+8.3
Nation-al Forest wards	**1991**	**250**	**696**	**28962**	**5797**	**23627**	**6405**	**13120**	**19946**	**3838**
	2001	**303**	**707**	**26182**	**7576**	**25735**	**6087**	**15107**	**21163**	**4753**
	100%	**0.3%**	**0.7%**	**24.3%**	**7.0%**	**23.9%**	**5.7%**	**14.0%**	**19.7%**	**4.4%**
	Change	**+21.2**	**+1.6**	**-9.6**	**+30.7**	**+8.9**	**-5.0**	**+15.1**	**+6.1**	**+23.8**
East Midlands	1991	25135	15180	399161	81573	399990	92021	233204	401690	71369
	2001	24087	17305	358295	88771	420870	97590	249156	423200	76432
	100.2%	1.4%	1.0%	20.4%	5.1%	24.0%	5.6%	14.2%	24.1%	4.4%
	Change	-4.2	+14.0	-10.2	+8.8	+5.22	+6.1	+6.8	+5.4	+7.1
West Midlands	1991	21674	16375	532880	98277	539707	120518	358524	525787	97672
	2001	20514	16502	460040	100392	552259	130283	370891	557228	#
	Change	-5.4	+0.8	-13.7	+2.2	+2.3	+8.1	+3.4	+6.0	#

NB. # Data unavailable Source: ABI

NB. The National Forest wards figure is an average of all of the wards that are either partly or wholly within the National Forest area. It is not possible to proportion the data to a lower level

Table 9 describes the local economy of The National Forest in terms of broad industrial sectors. The nature of employment and the growth and decline of employment in different sectors is an important indicator of how the economic structure of an area is changing.

In 2001, there were some 107,613 jobs in the National Forest wards. Around half of these jobs were in the ‘Manufacturing’ (24.3%) and ‘Distribution, hotels and restaurants’ (23.9%) sectors. There were also substantial numbers in ‘Public administration, education and health’ (19.7%) and ‘Banking, finance and insurance’ (14%). Just 0.3% or 303 jobs were in the ‘Agriculture and fishing’ sector.

Comparison between the National Forest wards and the East Midlands economy as a whole reveals generally similar employment profiles in 2001. The ‘Energy and water’, ‘Distribution, hotels and restaurants’ and ‘Banking, finance and insurance’ sectors were marginally smaller. The ‘Transport and communications’ sector was marginally larger and ‘Construction’ almost 2% larger than the regional average. ‘Other services’ was identical in size.

The larger differences were to be found in ‘Manufacturing’ which was around 4% higher than the East Midlands average and ‘Public administration, education and health’ which was around

4% lower. Notably, the proportion of employment in agriculture was below the East Midlands average.

Employment in agriculture and fishing (which includes forestry) has grown significantly (+21.2%) in sharp contrast to the regional picture where it has fallen by some 5% during the period 1991-2001. Conversely, jobs in 'Transport and communications' have fallen in contrast to the regional picture where it has been growing. 'Manufacturing' employment has also fallen, though slightly less quickly than the regional averages.

The number of jobs in 'Energy and water' has grown slightly during 1991-2001, but well below the East Midlands average of +14%. 'Public administration, education and health' has grown in line with regional averages. 'Distribution, hotels and restaurants' – which includes many jobs in the tourism industry – 'Banking, finance and insurance' and 'Other services' have grown more quickly than the regional average. 'Construction' jobs have grown dramatically over the decade, well ahead of regional averages.

Many of these changes reflect wider patterns of growth in employment in services and a decline in manufacturing. However, the dramatic growth in construction and agricultural employment (though from a low base) are trends unique to the Forest.

Percentage increase or decrease in the number of local jobs (Indicator 5)

Table 10: Change in the number of local jobs (1991-2001)

Area	Change in local jobs %
Charnwood	-2.9
Hinckley and Bosworth	-6.2
North West Leicestershire	7.7
South Derbyshire	6.3
East Staffordshire	1.7
Lichfield	0.8
National Forest wards	**4.1**
East Midlands	0.8
West Midlands	1.2

NB. The National Forest wards figure is an average of all of the wards that are either partly or wholly within the National Forest area. It is not possible to proportion the data to a lower level.

Source: ABI

The number of jobs in the National Forest wards over the period 1991-2001 has increased by 4.1% from 102,641 to 107,613 (Table 10). This was significantly above the averages for both the East and West Midlands. Analysis of the district level figures reveals that this may mask some significant variations within the Forest area. There are a variety of possible explanations for this uneven growth, from the availability of employment sites to proximity to growth areas or major roads.

Extent of self employment (Indicator 6)

Table 11: Levels of self employment (2001)

Area	% in emplt who are self employed	% of males in emplt who are employees	% males in emplt who are self employed	% females in emplt who are employees	% females in emplt who are self employed
Charnwood	9.5	85.7	14.3	96.9	-
Hinckley and Bosworth	14.5	78.1	20.9	93.3	-
North West Leicestershire	13.8	80.5	-	92.4	-
South Derbyshire	-	85.4	-	93.9	-
East Staffordshire	-	90.5	-	92.4	-
Lichfield	-	84.2	-	92.2	-
East Midlands	10.5	85.5	14	93.5	6
West Midlands	9.7	86.3	13.1	94.1	5.2
England	11.2	84.4	15	92.8	6.5

NB. A number of figures are suppressed as they are statistically unreliable. Source: LFS

Although limited in availability, 2001 data on levels of self employment within Forest area Districts (Table 11) show that Hinckley and Bosworth and North West Leicestershire have higher than average levels of self employment, with rates of 14.4% and 13.8% respectively. This compares to an East Midlands rate of 10.5%, West Midlands of 9.7% and an England rate of 11.2%. Charnwood is just below the average at 9.5%. Unfortunately there is no data available for the other Districts for overall comparisons to be made.

Self employment was notably higher amongst males than females nationally, regionally and within The Forest. In general, there were significantly higher levels of females in employment who are employees than males, which reflects national trends of 92.8% for females and 84.4% for males. Many of the Districts demonstrate similar rates to the national rate, except for Charnwood which was higher at 96.9%. For the males, again the rates were similar to the national rates, except for East Staffordshire where the rate was higher at 90.5%.

In general, this is a relatively healthy picture. The area shows few signs of being dominated by the low rates of entrepreneurship that often characterise former coalfield communities. It may also reflect the availability of opportunities for business formation in the Forest's growing sectors, such as construction and tourism.

5.2 Occupational profile

Occupational profile (Indicator 7)

Table 12: Occupational profile (percentage of people aged 16-74) (2001)

Occupational group	National Forest area	West Midlands	East Midlands	England and Wales
All people aged 16-74 in employment	94,869	2,334,567	1,917,728	23,627,754
	%	**%**	**%**	**%**
Managers and senior officials	14.7	14	14.5	15.1
Professional occupations	8.8	10	9.8	11.2
Associate professional and technical occupations	11.1	12	12.1	13.8
Administrative and secretarial occupations	13.3	12.7	12.1	13.3
Skilled trades occupations	13.1	13.3	12.6	11.6
Personal services occupations	6.7	6.7	6.8	6.9
Sales and customer services occupations	6.9	7.4	7.4	7.7
Process; plant and machine operatives	13.3	10.9	11.1	8.5
Elementary occupations	14.3	13	13.7	11.7

Source: Census

Based on 2001 Census tabulations, the number of people aged 16-74 in employment within the Forest area was 94,869 (Table 12). This compares with a figure of 91,931 in the previous report that was based on 1991 Census data. Unfortunately, the data is not strictly comparable as the 1991 calculations use a base of 16-64 years.

In comparison to the regional situation, the Forest area profile is, in 2001, very slightly skewed towards 'Managers and senior officials', but more so orientated towards manual trades, especially 'Process, plant and machine operatives', and 'Elementary occupations'. This is likely to be a reflection of the area's above average employment in the manufacturing and construction sectors and smaller service sector.

Comparison between 1991 and 2001 – again, not strictly possible across occupational types - indicates a shift away from Associate professional and technical occupations, skilled trades, and process operatives. This reflects the dynamics of the Forest area economy, with major industrial change, including job losses in traditional economic activities, over the inter-Censal period.

5.3 Unemployment

Proportion of the working age population who are unemployed (Indicator 8)

Claimant count unemployment data has been examined (Table 13). The 'official measure of unemployment', shows that the unemployment level in Forest area Districts has declined over the period 1996-2003 by around 6%, closely mirroring National trends. The Districts now have unemployment levels below the regional averages, although there is a case for the calculation of more realistic figures (real unemployment – see Section 6.4).

Claimant count unemployment in March 2003 stood at just 1.2%, some 0.5% below the average for England and Wales. This would typically be regarded as a 'transitional' level of unemployment and would be unlikely to go much lower due to the constant movement of people between jobs.

It should be noted that the information for the Claimant counts is provided using the 1991 ward boundaries as the new boundaries have not yet been updated by the Office for National Statistics. To overcome this, the data has been prepared based upon the methodology of the 2001 Study.

Table 13: Claimant count unemployment (1996-2003)

Area	March 1996 %	March 1998 %	March 2000 %	March 2003 %
National Forest area	7.6	4.6	4.1	1.2
East Midlands	7.3	4.3	3.9	1.6
West Midlands	7.8	4.9	4.5	1.9
England and Wales	7.6	4.7	3.9	1.7

Source: Nomisweb

Table 14: Male claimant count unemployment (1996-2003)

Area	March 1996 %	March 1998 %	March 2000 %	March 2003 %
National Forest area	9.9	5.9	5.3	1.7
East Midlands	10.0	5.8	5.2	2.3
West Midlands	10.2	6.4	6.0	3.0
England and Wales	10.4	6.5	5.4	2.6

Source: Nomisweb

Tables 14 and 15 demonstrate that male Claimant count unemployment was around double that of females in 1996. The latest figures, for March 2003, revealed that male and female rates have converged, with a substantial improvement in male unemployment during the period 2000-2003. Male unemployment has fallen by 8.2% and female 3.8% between 1996-2003.

In 1996 Male unemployment was some 0.5% below the national average – this has improved to 0.9% in 2003. Female unemployment stood 0.4% above the national average in 1996, improving to 0.2% below the national average by 2003. It is possible to speculate that substantial progress has been made in creating new opportunities for the predominantly male workforce of the area's former traditional industries. In addition, the growth of sectors such as 'Banking, finance and insurance' and 'Other services' typically creates more opportunities for females.

Table 15: Female claimant count unemployment (1996-2003)

Area	March 1996 %	March 1998 %	March 2000 %	March 2003 %
National Forest area	4.4	2.8	2.4	0.6
East Midlands	3.9	2.3	2.1	0.8
West Midlands	4.2	2.7	2.3	0.9
England and Wales	4.0	2.5	2.1	0.8

Source: Nomisweb

Table 16 describes long term unemployment in the Forest area Districts, which has fallen by 28% between 1996-2003. This decline has broadly followed national trends. However, the position of the area has improved, from 4.5% below the national average in 1996 to 8.6% below in 2003. Additional analysis on this feature is provided in the section on benefit dependence (Section 6.2; Table 23).

Table 16: Workers unemployed for more than 6 months as a percentage of all unemployed (1996-2003)

Area	March 1996 %	March 1998 %	March 2000 %	March 2003 %
National Forest area	51.1	41.1	32.1	23.1
East Midlands	53.4	38.0	35.3	31.0
West Midlands	57.9	46.7	43.0	28.0
England and Wales	55.6	44.1	39.0	31.7

Source: Nomisweb

ONS derived figures for the proportion of the workforce who are unemployed – a standard Audit Commission indicator - are not currently available across the Forest area Districts due to statistical unreliability issues (see Table 17). The Table is included for future comparison purposes on the assumption that more accurate data will be available in the future.

Table 17: Unemployment (1999-2001)

Area	% of workforce unemployed	
	1999	2001
Charnwood	#	7.2
Hinckley and Bosworth	#	#
North West Leicestershire	#	#
South Derbyshire	#	#
East Staffordshire	#	#
Lichfield	#	#
East Midlands	4.2	4.7
West Midlands	5.2	5.4
England	4.6	4.9

NB. # Figures are suppressed as statistically unreliable Source: ONS

5.4 Earnings

Table 18 demonstrates that average annual earnings are marginally higher in the West Midlands than in the East Midlands. Typically males earn more than females in both the East and West Midlands, although the gap has narrowed due to the faster growth of female earnings during 1999-2002. In general, earnings for the Districts in the National Forest area are below the regional averages and significantly lower than the national average. However, figures are not available for areas below district level, and some figures are not available at district level.

Average annual earnings for full timers (Indicator 9)

Table 18: Average annual earnings for full timers (1999-2002)

Area	Male £		Female £		Total £	
	1999	**2002**	**1999**	**2002**	**1999**	**2002**
Charnwood	22,753	24,834	14,519	18,459	17,530	19,144
Hinckley & Bos	19,303	21,718	14,801	16,923	14,617	16,923
NW Leicestershire	21,689	23,532	16,091	16,224	17,153	17,553
South Derbyshire	24,192	21,776	14,000	14,668	17,217	16,130
East Staffordshire	20,959	22,248	15,149	18,731	16,202	18,069
Lichfield	22,679	24,061	15,060	17,018	17,145	17,925
National Forest Districts	**21,929**	**23,028 +4.8%**	**14,937**	**17,014 +12.2%**	**16,644**	**17,624 +5.6%**
East Midlands	20,766	23,609 +12.3%	14,910	17,407 +14.3%	15,731	17,886 +12%
West Midlands	21,575	24,418 +11.6%	15,646	18,354 +14.8%	16,428	18,504 +11.2%

Source: NES

Earnings growth in the National Forest Districts at 5.6% has not kept pace with the regional averages of 11-12% over the period. Female earnings growth was around 2% slower, whilst male growth was some 7% slower. Average annual earnings were above the regional averages in 1999 and below in 2002. A predominance of lower wage rates is often associated with certain sectors, such as agriculture and tourism – both of which are growing in the Forest. On a more positive note, lower wage rates may be attractive to potential inward investors.

Table 18 also shows that the average annual earnings for full-time workers in the National Forest Districts was £17,624 in 2002. Relatively low figures for coalfield heartland communities are reflected in the average annual male earnings in South Derbyshire which have actually fallen by over 11% between 1999 and 2002.

Average wages per week (Indicator 10)

Table 19: Average gross weekly earnings for full timers (2002)

Area	Male £	Female £	Total £
Charnwood	477.60	-	441.10
Hinckley and Bosworth	417.60	-	380.80
North West Leicestershire	452.50	-	407.00
South Derbyshire	-	-	-
East Staffordshire	427.80	-	407.10
Lichfield	-	-	418.50
National Forest Districts	**443.88**	**-**	**410.90**
Derbyshire	456.80	317.50	411.90
Leicestershire	466.70	337.10	422.70
Staffordshire	443.20	351.20	411.20
East Midlands	454.20	334.80	413.00
West Midlands	469.60	353.00	427.30
England and Wales	516.90	385.80	468.10

NB. A number of figures are suppressed as they are statistically unreliable. Source: NES

Despite some gaps in the data for this indicator, average gross weekly earnings for full-timers (Table 19) range from £380-£441 across the Forest Districts, averaging £410.90. This was below the regional averages and significantly below the national average.

Clearly, the need to raise wage levels in The National Forest area will be a key challenge for future policy.

6.0 Deprivation

6.1 Index of Multiple Deprivation 2000

Proportion of the population who live in wards that rank within the most deprived 10% and/or 25% wards in the country (Indicator 11)

The Index of Multiple Deprivation 2000 (IMD2000) is widely regarded as the most accurate and comprehensive measure of deprivation available. The data highlights two wards in the Forest area – Victoria and Waterside - within the 10% most deprived in the Country and 13 within the 25% most deprived. It should be noted that small pockets of deprivation may be overlooked even with ward level data.

Table 20: Forest wards within the 10% and 25% most deprived in the Country (IMD2000)

No.	Ward	District	IMD Score	Rank out of 8414 wards in England	Population in Forest area (1991 Census)
10% most deprived					
1	Victoria	East Staffs	46.07	754	4316
2	Waterside	East Staffs	44.93	821	4335
25% most deprived					
3	Uxbridge	East Staffs	44.42	855	2644
4	Burton	East Staffs	43.30	916	1220
5	Greenhill	NW Leics	40.69	1076	6068
6	Broadway	East Staffs	39.89	1128	3685
7	Eton	East Staffs	38.50	1231	3501
8	Winshill	East Staffs	33.53	1619	6533
9	Oakthorpe and Donisthorpe	NW Leics	32.16	1761	1983
10	Shobnall	East Staffs	31.43	1834	4067
11	Newhall	South Derbys	30.60	1912	6794
12	Bagworth	Hinckley & Bos	30.30	1947	1648
13	Hartshorne	South Derbys	29.64	2030	3505
				Total	**50,299**

NB. Forest population (1991) 191,395 Source: ODPM

Table 20 reveals that in 2000, 5% of The National Forest's population resided in wards that ranked within the 10% most deprived and 26% within the 25% most deprived wards. The concentration of deprivation in the inner wards of Burton upon Trent and the coalfield communities of South Derbyshire and North West Leicestershire is particularly apparent.

Table 21 provides a detailed breakdown of how the IMD score for each ward is composed. Examination of wards which ranked amongst the 2000 most deprived revealed concentrations of:

- income deprivation – people living on low incomes - in Burton upon Trent and parts of North West Leicestershire District;
- employment deprivation – people who want to work but are unable to do so through unemployment, sickness or disability - in Burton upon Trent and parts of North West Leicestershire and South Derbyshire Districts;
- health deprivation – people whose quality of life is impaired by either poor health or disability - in Burton upon Trent and parts of North West Leicestershire and South Derbyshire Districts;

- education deprivation – adults and children who lack qualifications - in Burton upon Trent and parts of North West Leicestershire, South Derbyshire and Hinckley and Bosworth Districts;
- housing deprivation – people living in unsatisfactory housing, and, in the extreme case, homelessness - in Burton upon Trent and small areas of North West Leicestershire and Hinckley and Bosworth Districts;
- access deprivation – people with limited access to essential services, such as post office, food shops, GP or primary school - in the most remote part of all six Districts within the Forest; and,
- evidence of child poverty – children living in families that claim means tested benefits - in Burton upon Trent and parts of North West Leicestershire, South Derbyshire and Hinckley and Bosworth Districts.

It should be noted that the Index of Multiple Deprivation was published in 2000 and that other indicators reviewed in this Study show some marked improvements, for example, in unemployment levels. However, it is possible to predict that these areas will remain the focus for regeneration activity in the Forest in the future. They also demonstrate a real and continuing role for organisations working in the Forest.

Table 21: Index of Multiple Deprivation ward scores and ranks by domain (IMD2000)

Ward	Index of multiple deprivation		Income domain		Employment domain		Health domain		Education domain		Housing domain		Access domain		Child poverty index	
	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Charnwood																
Bradgate	10.79	6077	13.89	4817	5.98	5910	-0.53	5989	-0.32	5300	-0.16	4730	-0.08	4124	16.55	5472
Nanpantan	4.58	8130	3.81	8369	4.36	7247	-1.45	7973	-0.81	6860	-0.52	5998	0.13	3371	2.26	8387
Outwoods	5.13	8015	5.09	8247	4.15	7410	-1.11	7435	-0.76	6746	-1.70	8170	0.59	2153	4.32	8274
Shepshed East	14.21	4950	14.95	4439	7.39	4785	0.38	5450	0.15	3566	0.04	4030	-0.19	4596	19.74	4744
Shepshed West	11.67	5804	12.01	5571	6.58	5410	-0.41	5560	0.19	3432	-0.56	6129	-0.05	3988	16.57	5461
Thurcaston	5.01	8043	5.13	8242	4.61	7049	-1.01	7270	-0.98	7308	-1.19	7627	0.43	2540	3.75	8319
Woodhouse and Swithland	10.51	6175	11.49	5804	6.32	5630	-0.27	5084	-1.42	8005	-0.54	6053	0.78	1743	16.74	5410
Hinckley and Bosworth																
Bagworth	30.30	1947	22.30	2518	10.80	2926	0.28	3132	0.82	1514	0.97	1201	1.01	1248	39.62	1870
Barlestone, Nailstone and Osbaston	14.09	4989	8.82	7047	5.42	6376	-0.40	5558	1.06	1030	-0.04	4310	-0.06	4047	12.09	6606
Desford and Peckleton	12.03	5688	12.53	5350	5.44	6367	-0.34	5314	0.04	3977	-0.47	5857	0.55	2236	14.19	6063
Groby	4.42	8156	7.49	7596	4.37	7245	-0.96	7179	-0.71	6570	-1.45	7969	-0.14	4358	6.86	7892
Markfield	15.91	4458	12.33	5425	6.40	5550	-0.14	4677	0.62	2029	-0.42	5667	0.74	1821	15.03	5842
Ratby	10.91	6043	11.72	5692	6.09	5810	-0.46	5734	0.01	4067	0.09	3829	-0.34	5267	16.32	5525
Twycross and Shackerstone	11.32	5918	7.87	7437	4.64	7021	-0.91	7059	-1.03	7404	-1.82	8241	1.89	101	9.34	7329
North West Leicestershire																
Appleby	8.67	6858	7.27	7683	5.23	6545	-0.40	5526	-0.65	6433	-0.89	7024	0.94	1404	7.14	7826
Breedon	6.59	7603	7.81	7468	4.50	7145	-0.90	7040	-0.82	6877	-1.00	7283	0.73	1864	12.20	6567
Castle	9.03	6733	11.06	6001	6.73	5281	-0.32	5228	-0.93	7181	-1.17	7591	0.14	3321	4.38	8266
Coalville	29.09	2111	24.77	2079	14.39	1779	0.74	1793	0.60	2077	0.44	2591	-1.42	8069	31.53	2757
Greenhill	40.69	1076	30.51	1311	17.15	1184	0.93	1357	1.10	958	1.04	1047	-0.04	3955	47.71	1155
Holly Hayes	15.35	4622	11.72	5693	7.30	4845	0.08	3845	0.69	1839	-1.18	7601	0.12	3396	9.67	7237
Holywell	12.88	5388	16.07	4070	7.38	4798	-0.42	5612	-0.36	5475	-0.22	4957	-0.10	4194	21.84	4316
Hugglescote	15.72	4515	14.56	4572	8.71	3942	0.20	3437	-0.19	4853	-0.77	6749	0.38	2635	19.14	4877
Ibstock and Heather	24.77	2690	16.72	3885	10.60	3007	0.50	2437	0.89	1356	0.18	3518	0.29	2872	21.05	4463
Ivanhoe	18.99	3758	20.04	2993	10.03	3263	0.41	2724	-0.47	5841	-0.16	4744	-0.13	4316	33.91	2496
Measham	13.43	5212	13.94	4800	7.72	4549	-0.05	4323	-0.26	5088	-0.23	5003	-0.07	4070	19.98	4683
Moira	22.06	3167	19.27	3182	10.34	3115	0.35	2921	0.34	2921	-0.45	5756	0.57	2200	26.59	3510
Oakthorpe and Donisthorpe	32.16	1761	28.94	1494	14.68	1709	0.58	2210	0.86	1436	-0.23	5018	0.15	3293	48.47	1100
Ravenstone	11.85	5744	12.94	5188	6.80	5226	-0.38	5470	-0.37	5502	-1.08	7434	0.67	1977	18.89	4935
Snibston	15.35	4623	15.14	4375	9.51	3539	0.22	3326	-0.27	5127	-0.35	5428	-0.39	5499	22.73	4151
Swannington	17.36	4115	11.22	5923	8.34	4158	0.18	3508	-0.08	4428	0.60	2081	0.63	2068	13.74	6173
Thringstone	19.38	3682	15.16	4372	10.97	2865	0.58	2220	-0.21	4903	-0.38	5571	0.28	2912	24.66	3827

Whitwick	16.63	4279	15.00	4427	8.79	3904	0.09	3802	0.47	2501	-0.78	6771	-0.17	4511	20.16	4637
Worthington	16.76	4252	15.89	4126	8.88	3854	0.28	3142	-0.28	5166	-1.41	7930	0.66	1997	19.94	4693
South Derbyshire																
Gresley	17.36	4117	16.44	3973	8.23	4234	0.22	3331	0.21	3353	-0.38	5567	0.13	3353	22.53	4192
Hartshorne	29.64	2030	24.58	2101	13.67	1938	0.84	1547	0.27	3135	0.14	3619	0.47	2426	46.20	1285
Linton	24.12	2819	18.28	3457	10.43	3079	0.72	1854	0.14	3576	0.54	2251	0.35	2709	29.37	3070
Melbourne	7.68	7204	11.96	5596	6.08	5823	-0.44	5684	-1.11	7554	-1.00	7280	-0.24	4820	11.90	6657
Midway	23.10	2985	21.03	2772	12.11	2406	0.65	2048	0.42	2679	-0.82	6857	-0.51	5963	38.22	2009
Netherseal	26.83	2370	22.44	2486	10.51	3046	0.85	1533	0.52	2334	0.02	4080	0.41	2580	24.13	3928
Newhall	30.60	1912	21.95	2595	13.26	2046	0.93	1360	0.86	1411	0.32	2972	-0.02	3893	31.43	2776
Overseal	17.56	4071	15.56	4235	8.40	4120	0.24	3257	0.40	2718	-0.85	6930	0.19	3162	33.69	2530
Repton	7.03	7444	7.65	7533	4.81	6873	-0.77	6679	-0.69	6525	-1.51	8026	0.77	1751	6.01	8057
Swadlincote	25.22	2624	23.54	2288	12.88	2160	0.80	1656	0.09	3791	-0.45	5785	-0.20	4658	29.43	3056
Ticknall	10.94	6038	9.78	6586	5.38	6419	-0.57	6111	-0.03	4245	-0.15	4700	0.70	1926	13.48	6228
Walton	14.64	4835	11.48	5807	7.11	4980	-0.11	4541	0.34	2930	-0.39	5580	0.57	2205	20.80	4505
Woodville	17.67	4052	15.56	4234	10.95	2871	0.50	2438	-0.44	5730	-0.55	6093	-0.11	4250	20.65	4544
East Staffordshire																
Branston	13.49	5186	9.77	6594	5.84	6020	-0.43	5638	0.35	2902	0.07	3907	0.79	1724	16.19	5550
Broadway	39.89	1128	32.58	1093	15.57	1482	0.63	2086	1.22	738	1.36	600	-0.63	6433	45.53	1341
Burton	43.30	916	31.70	1195	22.77	500	1.14	944	1.01	1115	0.47	2512	-0.55	6139	30.23	2938
Crown	10.50	6184	7.11	7739	4.36	7251	-0.75	6615	-0.22	4947	0.04	3991	1.18	914	9.78	7212
Edgehill	27.77	2250	23.45	2300	13.88	1881	0.69	1948	0.53	2286	0.05	3959	-0.29	5060	39.12	1915
Eton	38.50	1231	34.46	915	15.96	1402	0.85	1530	0.98	1172	0.81	1532	-0.86	7186	53.65	745
Horninglow	25.94	2515	23.79	2243	10.51	3050	0.49	2476	1.02	1099	0.15	3602	-1.57	8179	38.69	1954
Needwood	8.57	6900	8.88	7023	6.44	5517	-0.40	5530	-0.57	6180	-1.08	7432	0.29	2888	12.59	6470
Outwoods	12.49	5532	9.46	6757	6.00	5887	-0.43	5657	0.47	2502	-0.80	6818	0.71	1904	12.83	6403
Shobnall	31.43	1834	27.99	1608	13.50	1976	0.71	1895	0.70	1810	0.78	1598	-0.96	7427	44.59	1418
Stapenhill	9.05	6729	8.43	7219	5.16	6613	-0.49	5848	0.44	2591	-1.10	7465	-0.20	4652	8.44	7563
Stretton	7.48	7289	9.10	6924	3.88	7622	-0.88	6972	0.01	4079	-2.10	8330	0.43	2528	12.05	6617
Tutbury and Hanbury	16.18	4384	15.34	4314	7.27	4874	-0.18	4799	0.12	3687	0.32	2990	0.24	3032	22.92	4118
Uxbridge	44.42	855	40.05	505	16.14	1359	0.69	1939	1.09	970	1.61	381	-0.66	6546	60.10	428
Victoria	46.07	754	39.69	529	18.11	1026	0.86	1517	1.21	762	1.40	561	-1.25	7905	59.08	473
Waterside	44.93	821	37.35	686	18.64	938	1.12	992	1.04	1052	0.87	1404	-0.21	4691	57.30	556
Winshill	33.53	1619	29.11	1474	15.22	1573	0.72	1846	0.68	1877	0.54	2262	-0.14	4393	44.73	1411
Yoxall	6.98	7471	7.12	7735	3.95	7570	-1.07	7383	-1.40	7979	-0.17	4777	0.94	1392	9.12	7378
Lichfield																
Alrewas	7.74	7188	9.14	6907	5.09	6668	-0.70	6517	-0.29	5224	-0.37	5498	0.03	3697	13.85	6149
Mease Valley	14.31	4915	13.01	5159	4.34	7266	-0.37	5443	-0.20	4899	-0.16	4772	1.44	489	18.59	4997

6.2 Benefit dependence

Percentage of population of working age who are claiming key benefits (Indicator 12)

Table 22: Population of working age claiming key benefits (2000)

Area	% of working population claiming key benefits
Charnwood	3.9
Hinckley and Bosworth	3.5
North West Leicestershire	4.8
South Derbyshire	5.5
East Staffordshire	5.4
Lichfield	4.1
National Forest area	**5.1**
East Midlands	5.7
West Midlands	6.5

Source: ONS, Benefits Agency

The proportion of the working population claiming key benefits varies across the Districts within the Forest. A Forest area average of 5.1% in 2000 can be calculated from the absolute figures, revealing that the proportion of key benefit claimants was very marginally higher within the Forest area than in the wider area encompassed by the Districts.

However, the overall average for the Forest area also shows that benefit dependence was lower than both the West Midlands and East Midlands rates, at 6.5% and 5.7% respectively (Table 22). Benefit dependence was highest in South Derbyshire, though this was still below the regional average.

Proportion of the unemployed people claiming benefit who have been out of work for more than a year (Indicator 13)

Table 23: Proportion of unemployed people claiming benefit who have been out of work for more than one year (Average for 2002)

Area	Male %			Female %			Total %		
	1995	**1999**	**2002**	**1995**	**1999**	**2002**	**1995**	**1999**	**2002**
Charn-wood	33.5	19.9	16.7	21.2	12.0	14.4	30.0	17.6	16.1
Hinckley and Bos	28.8	16.1	12.5	19.7	10.4	9	26.0	14.4	11.4
NW Leics	39.3	19.3	16.5	24.5	11.9	9.1	35.7	17.2	14.2
South Derbys	32.4	23.2	14.8	22.7	12.0	9.4	30.0	20.2	13.1
East Staffs	33.4	23.4	11.7	23.8	13.5	6.5	31.1	20.9	10.3
Lichfield	30.5	17.5	14.4	19.4	12.6	9	27.3	16.0	12.8
East Midlands	38.7	23.9	16.9	26.0	15.3	11.2	35.6	21.8	15.5
West Midlands	43.5	28.4	20	30.6	19.1	13.5	40.4	26.2	18.4
England	40.0	26.6	17.6	27.7	18.0	12.0	37.1	24.6	16.2

Source: ONS

A measure of unemployment duration is produced as Table 23. This shows the proportion of unemployment benefit claimants who have been out of work for more than 52 weeks. The figures for 2002 reveal a range of levels across the Forest Districts with a figure of 10.3% in East Staffordshire and 16.1% in Charnwood. However, local factors – such as deliberate policy initiatives to clear the long-term register, or new training opportunities peculiar to a specific area, make interpretation a complex process.

All of the Forest Districts experienced lower long term unemployment than the national and regional averages, for males and females. The proportion of people claiming benefit who have been out of work for more than a year has fallen dramatically between 1995 and 2002. Nationally and regionally the rate has more than halved, which has been reflected in all of the Forest Districts. The national rate has fallen from 37.1% to 16.2%. East Staffordshire demonstrates the most significant decrease, with the 2002 figure a third of the 1995 figure.

Overall, females were less likely to be out of work for more than 12 months, but the rates have still dropped in all of the Forest Districts. The rate of male long term unemployment has fallen significantly in all of the areas, with male and female rates converging so that there was a much smaller gap between the rates.

Income support claimants as a percentage of population (over 16) (Indicator 14)

Table 24: Income support claimants as a percentage of population (over 16) (1998-2000)

Area	**% of income support claimants**	
	1998	**2000**
Charnwood	4.5	3.6
Hinckley and Bosworth	4.0	3.8
North West Leicestershire	4.7	4.8
South Derbyshire	4.7	5.4
East Staffordshire	5.6	5.6
Lichfield	4.4	4.2
National Forest area	**5.0**	**4.6**
East Midlands	6.2	6.1
West Midlands	7.2	7.1

Source: ONS

Claimant data (Table 24) for 2000 shows that amongst the over-16 population within the Forest area, around 4.6% were dependent on Income Support benefit, with variations across the Districts between 3.6 and 5.6%. The percentage of claimants has fallen in the National Forest area between 1998 and 2000, although this masks a variety of shifts within individual Districts. Increased benefit dependence in North West Leicestershire and South Derbyshire was countered by declines in Charnwood, Lichfield and Hinckley and Bosworth Districts. Generally, dependence in the Forest area remained significantly below regional averages.

Overall, benefit dependence in the Forest was below average and declining more quickly than the regional averages. Performance was variable across the Districts, with particular challenges in North West Leicestershire, South Derbyshire and East Staffordshire.

6.3 Health

Death rate by cause (Standardised Mortality Ratio) (Indicator 15)

Table 25: Standardised Mortality Ratio by gender (2002)

Area	Male	Female	Total
Charnwood	90	92	91
Hinckley and Bosworth	89	95	92
North West Leicestershire	93	103	98
South Derbyshire	102	104	103
East Staffordshire	105	102	103
Lichfield	105	108	107
National Forest Districts	**97**	**101**	**99**
East Midlands	100	102	101
West Midlands	103	101	102

NB. UK=100 Source: ONS

Standardised Mortality Ratio data is expressed as an index, with 100 as the national average. Rates varied across the Forest area Districts (Table 25) between 91 and 107, with slightly wider variations (92-108 as against 90-105) for females. Male health was generally poorer than female health, which could be linked to past employment patterns. Charnwood and Hinckley and Bosworth Districts demonstrated the poorest health, particularly amongst males. In general, rates were close to the regional and national averages. If Lichfield, which has particularly high levels of health, is excluded the average is reduced to 97.

6.4 Real (hidden) unemployment

Real (hidden) unemployment (Indicator 16)

Real unemployment provides an alternative perspective on unused capacity in the local labour market. The conventionally reported unemployment rate reflects a ‘claimant count’ and, it is argued, under represents the ‘real’ level of unemployment. The notion of ‘real unemployment’ aims to adjust and extend these figures to provide a fuller picture. It includes estimates for those who are unable to claim benefit (unemployed people identified by the Labour Force Survey), and makes allowance for those on government schemes, those pushed into early retirement, and those who claim sickness benefits but who are likely to be available for work. In this way it seeks to provide a more realistic indicator of the proportion of people seeking and/or available for work.

The data for National Forest Districts typically reflects the former coalfield status of much of the area (Table 26). In such socio-economic environments, past industrial, employment, health and political factors have led to a larger than average level of long-term unemployment and registrations for incapacity benefit and this reflects itself in the data set. For example, Districts with a former coal production base and thus remnant coalfield communities, such as South Derbyshire and North West Leicestershire, recorded ‘real unemployment’ rates that were up to four times the official claimant count figure.

All of the Districts revealed real unemployment levels substantially above the claimant count figures. However, for both males and females, they remained below the regional and national levels. An improvement in the level of real unemployment over the period 1997-2002 was evident in all Districts.

Table 26: Claimant count and real unemployment estimates for Local Authority Districts within the National Forest area (January 2002)

Area	Claimant count %			Real unemployment %			Change 97-02 %
	Male	Female	Total	Male	Female	Total	
Charnwood	3.1	1.5	2.4	4.2	5.7	4.9	0 to -2
Hinckley and Bosworth	2.2	1.2	1.8	3.6	5.2	4.4	0 to -2
North West Leicestershire	2.4	1.4	2.0	7.0	8.5	7.6	0 to -2
South Derbyshire	2.3	1.3	1.9	7.6	8.9	8.2	0 to -2
East Staffordshire	3.3	1.8	2.6	8.7	7.9	8.3	-2 to -4
Lichfield	2.6	1.5	2.1	6.6	7.7	7.1	0 to -2
Median %	**2.7**	**1.5**	**2.1**	**6.3**	**7.3**	**6.8**	**NA**
East Midlands	4.2	1.8	3.2	8.8	8.8	8.8	NA
West Midlands	5.3	2.1	3.9	11.1	9.0	10.2	NA
Great Britain	4.7	1.9	3.5	10.2	8.6	9.5	NA

Source: CRESR

6.5 Car ownership

Extent of car ownership (Indicator 17)

Table 27: Car ownership within the Forest (2001)

Area	Total households No.	No car or van		1 car or van		2+ cars or vans	
		No.	%	No.	%	No.	%
National Forest area	81,100	18,159	22.4	34,919	43	28,540	35.2
East Midlands	1,732,482	420,165	24.3	770,028	44.4	542,289	31.3
West Midlands	2,153,672	576,484	26.8	923,743	42.9	653,445	30.3
England and Wales	21,660,475	5,802,183	26.8	9,486,366	43.8	6,371,926	29.4

Source: Census

Car ownership is a widely used indicator of wealth. In rural areas with typically more limited public transport services, it is also a crucial factor in determining accessibility and conversely isolation. Table 27 reveals that car ownership and multiple car ownership in the Forest was above both regional and national averages in 2001. Despite this, 22.4%, or over 18,000 households, in The National Forest had no access to a car or van.

7.0 Housing

7.1 House values

Average property price (Indicator 18)

Table 28: Average property price (2002)

Area	Detached £	Semi-detached £	Terraced £	Flat £	Overall £
Charnwood	182,834	96,990	77,915	72,269	114,450
Hinckley and Bosworth	172,359	91,123	70,982	67,738	112,080
North West Leicestershire	155,451	83,606	67,846	58,176	111,540
South Derbyshire	141,923	78,154	67,747	113,968	104,246
East Staffordshire	160,040	81,508	53,524	63,112	100,182
Lichfield	213,857	105,327	94,506	87,558	146,093
National Forest Districts	**171,077**	**89,451**	**72,087**	**77,137**	**114,765**
East Midlands	153,785	82,653	65,991	79,752	102,455
West Midlands	187,712	95,721	74,321	83,504	111,306

Source: Land Registry

An average property price for the six Districts has been calculated, producing an overall figure of £114,765 (Table 28). This was significantly higher than the East Midlands average of £102,455 and marginally higher than the West Midlands average of £111,306 in 2002.

It should be noted that Lichfield had significantly higher property prices than the other Districts within The National Forest. As Lichfield has only two wards within the Forest area, these figures distort the overall averages. If Lichfield is removed from the calculations the overall average for the Forest Districts was £108,500, which is lower than the West Midlands average but still greater than the corresponding value for the East Midlands.

The 2001 Study found average house prices in the second quarter of 2000 to be £73,031 overall, slightly above the East Midlands at £72,132 and below the West Midlands at £80,300. This compares with a range of £100,182 - £146,093 amongst Districts in the Forest area in 2002. Whilst it should be noted that the 2001 Study used a base of postcode areas and thus is not directly comparable, it does indicates that average property prices have continued to follow the earlier trend. Prices have risen in line with regional trends, possibly having widened the advantage over the East Midlands average and narrowed the gap with the West Midlands. This indicates a relatively healthy residential property market and little evidence of the abandoned housing and market failure found in some more remote former coalfield communities.

The impact of The National Forest on the housing market in the area is further discussed in Section 13.

7.2 Housing completions

Housing completions (Indicator 19)

Table 29: Housing completions (1995-2003)

National Forest area (by District)	1995	1997	1999	2002-03 (01/04/02 – 31/03/03)
Charnwood	559	758	365	267
East Staffordshire	1551	1190	1580	130
Hinckley and Bosworth	69	41	64	166
Lichfield	0	53	12	16
North West Leicestershire	399	365	575	382
South Derbyshire	477	115	383	331
Total	**3055**	**2522**	**2979**	**1292**

Source: Local Authority planning departments

In Table 29, housing completions are recorded by District, focusing only on those undertaken within the Forest area. A change of measuring period has been introduced to bring the Study's indicators into line with those of the Audit Commission. However, this does not prohibit comparisons being made.

The data for housing completions shows some fluctuations across the Districts. Hinckley and Bosworth, for example has experienced a large growth in completions, whereas East Staffordshire and North West Leicestershire have seen a decline. Overall, the level of completions has declined significantly from 3055 in 1995 to 1292 in 2002/03.

The wide range of factors influencing the rate of housing completions, other than the impact of the NFC, should be noted. These include, for example, the state of the housing market nationally, land availability and land ownership issues. Given, the surprisingly large fluctuations in the level of completions over time, a good case could be made for more detailed investigation of the trends and factors determining the rate of construction within The National Forest.

8.0 The economy

8.1 Gross Domestic Product (Gross Value Added)

GDP per head and growth in GDP per head (Indicator 20)

Gross Domestic Product (GDP) per head – until recently the conventional measure of productivity, is now more usually measured as Gross Value Added per head (GVA) which amounts to GDP less taxes (subsidies) on products and services.

Recent data on GVA per head is not currently available for levels of disaggregation below NUTS2 (Nomenclature of Units for Territorial Statistics, where NUTS2 involves 37 areas within the UK), although NUTS3 level data (133 areas) are due to be published in December 2003 (National Statistics, 31 October 2003). NUTS2 level data is not produced as it covers groups of counties – Shropshire and Staffordshire; Derbyshire and Nottinghamshire; and Leicestershire, Rutland and Lincolnshire) and does not map on to The National Forest area.

This indicator is included in the expectation of better quality data being available in the future.

8.2 Business stock

Total number of VAT registered businesses in the area per 10,000 population (Indicator 21)

Table 30: Change in stock of VAT registered enterprises (1995-2002)

Area	1995	2000	2001	2002	2001 Businesses per 10,000 population
Charnwood	4140	4040	3995	3975	260
Hinckley and Bosworth	3130	3305	3330	3370	333
North West Leicestershire	2530	2625	2685	2790	314
South Derbyshire	1975	2040	2080	2095	255
East Staffordshire	3020	3150	3145	3235	303
Lichfield	2955	3025	2975	3010	319
National Forest Districts	**17,750**	**18,185**	**18,210**	**18,475**	**297**
West Midlands	136,595	136,490	136,755	137,735	258
East Midlands	110,755	110,970	111,120	111,900	266
England	1,361,145	1,410,410	1,416,525	1,428,175	288

Source: Business Start ups and Closures: VAT Registrations and De-Registrations 1994 - 2001 Small Business Service

The total number of VAT registered businesses has grown steadily in the National Forest Districts from 17,750 in 1995 to 18,475 in 2002 (Table 30). The growth in enterprises has been particularly rapid in the Districts of Hinckley and Bosworth and North West Leicestershire, whilst in Charnwood there has been a notable decline in numbers between 1995 and 2002. However, it should be noted that this is District level data and the characteristics of the included and excluded areas may differ significantly. In Charnwood, for example, the area of the District within the Forest is predominantly rural, with a low population density and little commercial activity.

The number of businesses per 10,000 population compares favourably with the rates for the East and West Midlands and England as a whole. There were 297 businesses per 10,000 population in the Forest Districts, compared to 258 in the West Midlands, 266 in the East Midlands and 288 in England.

Percentage increase or decrease in the total number of VAT registered businesses in the area (Indicator 22)

Table 31: Percentage change in stock of VAT registered enterprises (2001-2002)

Area	% change in number of VAT registered businesses
Charnwood	-0.5
Hinckley and Bosworth	1.2
North West Leicestershire	3.9
South Derbyshire	0.7
East Staffordshire	2.9
Lichfield	1.2
East Midlands	0.7
West Midlands	0.7

Source: ONS

Business development within the Forest area is also represented by data on VAT registrations and deregistrations (Table 31). The most recent data for the National Forest Districts showed a predominantly healthy picture, with five of the six Districts equalling or exceeding the regional averages. However, once again performance ranges, from a decline of -0.5% in Charnwood through to a growth of +3.9% in North West Leicestershire.

Given that this is District level data it is useful to consider the influence of activities outside of the Forest boundaries in Districts such as North West Leicestershire, Hinckley and Bosworth and Lichfield. More typically of coalfield communities, there is a lower rate of business formation in areas such as South Derbyshire.

Business formation and failure rates (Indicator 23)

Table 32: Business stock: formation rates and failure rates (1995-2001)

Area	Formation rates %		Failure rates %	
	1995	**2001**	**1995**	**2001**
Charnwood	9.3	9.3	10.7	9.6
Hinckley and Bosworth	10.1	9.9	10.4	8.7
NW Leicestershire	9.1	11.5	9.7	7.8
South Derbyshire	9.4	9.6	10.9	8.9
East Staffordshire	8.8	11.0	8.9	8.1
Lichfield	9.0	10.4	10.3	9.2
East Midlands	9.7	10.4	10.3	9.6
West Midlands	9.7	10.4	10.7	9.7
England	10.5	10.9	11.1	10.0

Source: Business Start ups and Closures: VAT Registrations and De-Registrations 1994 - 2001 Small Business Service

Closer examination of business formation and failure rates during the period 1995-2001 shows a healthy picture (Table 32). Formation rates were generally rising, with Districts such as North West Leicestershire, East Staffordshire and Lichfield outperforming regional and national averages. By contrast, formation rates have slowed in Hinckley and Bosworth, though only marginally. Failure rates have also improved during 1995-2001 and compare favourably with regional and national averages. Business failures have declined in all six Districts.

Clearly, the health of the national economy is a key determinant of business health, with greater numbers of businesses established during times of prosperity. However, the business stock is also influenced by local economic conditions and the quality of support services. The indicators drawn from VAT registrations point to a relatively healthy and growing local economy in The National Forest.

8.3 Inward investment

Total number of inward investment enquiries dealt with per annum (Indicator 24)

Table 33: Inward investment enquiries (2002-2003)

National Forest area (by District)	Number of enquiries (01/04/02 – 31/03/03)
Charnwood	7
East Staffordshire	50
Hinckley and Bosworth	72
Lichfield	0
North West Leicestershire	334
South Derbyshire	93
Total	**556**

Source: Local Authority Economic Development Departments and Instaffs

This is a new measure that will provide an important baseline for future years as local authorities increasingly adopt the Audit Commission indicators for economic regeneration. Whilst listed by District, the data in Table 33 refers to enquires relating to properties within the Forest area.

Inward investment enquiries provide an indication of local economic development potential, in particular, the health of the commercial property market within the Forest. A rising number of enquiries may be attributed to growing interest by potential investors. Clearly, a dominant factor in this will be the relationship between the number of enquiries and the number of sites and premises that are available.

9.0 Tourism

The volume and value of tourism activity in The National Forest has been measured periodically since 1997. This section is based upon economic impact studies undertaken by the Heart of England Tourist Board (HETB) on behalf of the NFC, including the provisional findings of the most recent study which relates to 2002. It is important to note that for a variety of methodological reasons, the HETB states that the 2002 data is not directly comparable with earlier studies. It is also believed that the change may lie behind the apparent fall in visitor numbers and that in real terms the level of visitors is higher than estimated. Clearly, this is an issue that requires further investigation.

9.1 Visitor numbers

Day visitors per annum (Indicator 25)

Table 34: Day visitors per annum (1997-2002)

Visitor type	1997	1999	2002
Overnight visitors	311,149 (6%)	347,000 (6%)	334,000 (7%)
Day visitors	**5,074,538 (94%)**	**5,350,000 (94%)**	**4,600,000 (93%)**
Total	5,385,687	5,697,000	4,934,000

Source: HETB

The HETB found that approximately 5.1 million day visitors came to the Forest in 1997, rising to 5.4 million in 1999 (Table 34). However, day visitor numbers fell in 2002 to 4.6 million There are a number of external factors that may have contributed to this, such as the outbreak of Foot and Mouth Disease and the impact of September 11 on international travel.

The Forest has seen some growth in overnight visitors but a slight decline in 2002. However, these changes may be explained by the substantive methodological changes introduced in 2002. Whilst the majority of income generated is from day visits the proportionate spend by overnight visitors is much higher and it is this category that provides the potentially greatest benefit to the local economy. This is an issue raised and discussed in Section 13.0.

9.2 Economic impact

Bed nights per annum (Indicator 26)

Table 35: Bed nights per annum (1997-2002)

Purpose of visit	1997	1999	2002
Holiday	354,559 (40%)	323,000 (34%)	528,000 (53%)
Business	75,662 (9%)	93,000 (9%)	71,000 (7%)
Visiting friends and relatives	375,755 (42%)	467,000 (46%)	360,000 (36%)
Other	80,264 (9%)	118,000 (11%)	35,000 (4%)
Total	**886,240**	**1,002,000**	**994,000**

Source: HETB

Table 35 shows an increase in bed nights over the period 1997-1999, followed by a slight fall in 2002. The growth appears to be largely attributable to the expansion of holiday visits to the Forest area. From the available data it is difficult to confidently identify trends in the overnight visitor market.

Average spend per visitor (Indicator 27)

Table 36: Average spend per visitor (1997-2002)

Visitor type	1997		1999		2002	
	Spend £	Spend / Visitor £	Spend £	Spend / visitor £	Spend £	Spend / visitor £
Overnight visitors	27,987,232	89.95	28,290,000	81.53	40,000,000	119.76
Day visitors	78,300,698	15.43	99,830,000	18.66	124,000,000	26.96
Total	**106,287,930**	**19.74**	**128,120,000**	**22.48**	**164,000,000**	**33.24**

Source: HETB

In 2002, the HETB estimated that day visitors to The National Forest spent, on average, £27 whilst overnight visitors averaged £120 per trip (Table 36). Over the period 1997-1999, there was a declining average overnight visitor spend and a growing day visitor spend. Under the 2002 methodology, overnight visitor spend has increased sharply and day visitor spend remained constant. Average spend per visitor has risen from £19.74 in 1997, to £33.24 in 2002. Total visitor spend in the Forest has risen steadily to £164 million per annum in 2002.

Employment in tourism (Indicator 28)

Table 37: Employment in tourism (1997-2002) (full time equivalent)

Sector	1997	2002
Accommodation	450 (17%)	274 (11%)
Retail	600 (22%)	630 (23%)
Catering	1,100 (41%)	1070 (40%)
Entertainment	400 (15%)	329 (12%)
Transport	150 (6%)	155 (6%)
Arising from non-trip spend	NA	227 (8%)
Total	**2,700**	**2,685**

Source: HETB

In 2002, the HETB state that there were 2,685 people (full time equivalent) directly employed in tourism in The National Forest (Table 37). The total number of jobs supported, including part time, is 4513. The majority of the jobs were to be found in either the catering (40%) or retail (23%) sectors.

It is useful to note the less tangible benefits of tourism to an area. It is widely accepted that tourism development and destination marketing enhance the image and can influence the perceptions of an area. This may then generate spin-offs in terms of, for example, house values and inward investment. The development of tourism facilities may also create greater leisure opportunities for the resident population.

Other work by the Centre for Economic and Social Regeneration, has established the particular importance of tourism to the regeneration of rural areas. It is a growing sector that integrates well with 'rural life' – offering opportunities for diversification and the re-use of farm buildings. In addition, there are low barriers to business start-up and opportunities for individuals at a range of skill levels.

The tourism economy of The National Forest has developed more rapidly than originally envisaged. The most recent figures indicate that growth, especially in terms of expenditure and jobs supported is being sustained.

Whilst there has been some increase in overnight stays, the percentage of visitors staying overnight in the area remains relatively low at 7%. A study of visitors to the Cannock Chase Area of Outstanding Natural Beauty in 2000 found that 8% of visitors were staying overnight. The 1998 UK Tourism Survey revealed that nationally, around 0.3% of all domestic trips involved an overnight stay.

The Forestry Commission undertakes a programme of visitor monitoring at a selected number of their woodland sites in England, Wales and Scotland. In 2001, this revealed almost that almost half of the visitors surveyed lived locally (within 15 miles of the site), a third were holidaymakers (staying overnight) and the remainder were on a day trip from home. The provision of more good quality overnight accommodation represents an ongoing challenge for the NFC and partners if the economic benefits of tourism are to be maximised.

10.0 Forest-related education and training

10.1 Courses

Number of training opportunities in agriculture, environment/conservation, horticulture, forestry, catering and leisure/tourism (Indicator 29)

Table 38: Forestry, environmental and tourism related training courses available in Further Education colleges in, or close to, the National Forest area (2003-2004)

College	Agri-cult-ural	Environ-mental/ conservation	Horticulture	Forestry	Catering	Leisure and Tourism
Derby Coll (B-roomfield Coll)	3 (6)	4 (5)	10 (5)	3 (4)	3 (0)	1 (0)
SE Derbyshire Colleges	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (3)
Loughborough College	0 (0)	2 (5)	2 (0)	0 (0)	10 (0)	7 (5)
Stephenson College	0 (1)	3 (2)	0 (4)	1 (5)	0 (8)	2 (6)
N Warks and Hinckley Coll	0 (0)	0 (0)	0 (11)	0 (0)	4 (14)	0 (7)
Brooksby Agri College	2 (6)	3 (7)	16 (9)	8 (2)	0 (0)	0 (1)
Burton on Trent College	0 (0)	0 (0)	0 (0)	0 (0)	4 (5)	4 (2)
Tamworth and Lichfield Coll	0 (n/k)	2 (n/k)	0 (n/k)	0 (n/k)	3 (n/k)	5 (n/k)
Rodbaston College	3 (3)	7 (6)	6 (0)	0 (0)	0 (0)	0 (1)
Stafford College	0 (0)	0 (0)	0 (0)	0 (0)	5 (8)	6 (4)
Total	**8 (16)**	**21 (25)**	**34 (29)**	**12 (11)**	**29 (35)**	**28 (29)**

NB. Data from 2001 Study shown in brackets. This excludes Tamworth and Lichfield College.

Source: Information supplied by ten Further Education colleges in Derbyshire, Leicestershire and Staffordshire

Table 38 reveals that there has been an overall decrease in the number of courses related to and offered in, or proximate to, the National Forest area - from 145 in 2000/01 to 132 in 2002/03. The number of agriculture courses on offer halved to eight and environmental and conservation courses dropped slightly to 21. Catering also saw a drop from 35 to 29 courses. There was a slight increase in the number of horticulture courses. Forestry and leisure and tourism courses remained at similar levels to 2000/01.

11.0 External funding

Grant secured (Indicator 30)

11.1 Regeneration programmes

The National Forest area benefits from a number of major Government investment programmes. Typically, these have been initiated as a response to the decline of traditional industries, including mining and agriculture.

Table 39 highlights a number of these programmes that have particular relevance to The National Forest. The programmes are managed by two partnerships: the Burton Community Partnership and the North West Leicestershire and South Derbyshire Coalfields Regeneration Partnership. In the case of the Coalfields Partnership, the boundaries of the SRB area, Rural Development Area and Leicestershire and South Derbyshire Coalfields Area are co-terminus.

Each programme has secured a sizeable grant from a principal public sector funder, in most cases the relevant regional development agency. This grant has then been matched, with other public, private and voluntary/community sector monies, enabling a far larger investment to be undertaken. All of the programmes indicated in Table 39 operated during the period 1999-2002, although the figures shown are for the lifetime of the programme which is typically longer.

These programmes have built upon the positive benefits of earlier work increasing the impact of the regeneration effort begun under:

- Burton SRB 2 and Objective 2 programmes;
- Swadlincote SRB 2 programme;
- Coalville SRB 2 programme; and
- RECHAR 2 programme 1995–1999.

These programmes included a number of projects that were directly related to the creation of The National Forest, including Burton Washlands, Swadlincote Woodlands, Ashby Woulds, The Heart of The National Forest and Coalville/Snibston.

The 2001 Study estimated that these programmes resulted in funding of £32.5m for the area which attracted leverage of £96m. The RECHAR programme alone created over 500 jobs. Whilst external funding streams have become more complex and the extent of some of the problems is diminishing, The National Forest remains an important catalyst. The following analysis highlights the link between it and a number of regeneration programmes and shows how substantial funding has come to the area from sources such as the lottery, landfill tax credits and the coalfield/rural programme.

Table 39: Key external funding programme operating during (1999-2002)

Programme	Funding secured (Lifetime) £ '000s	Total value of programme (Lifetime) £ '000s	Key impacts
Burton Community Partnership			
Burton – Investing in Inclusion (SRB6)	6,525 (7 years)	22,881	Enhancing employability; Improving the local environment; Building community and institutional capacity.
Leicestershire and South Derbyshire Coalfields Regeneration Partnership			
[SRB5 & 6 merged]			
NW Leics and S Derbys – Action for Social Inclusion in Rural Communities (SRB5)	600 (5 years)	2,160	Establishing a series of one-stop shops, together with a mobile outreach service providing local residents with access to the Internet; Developing a multi-agency programme to address the needs of excluded and isolated young people.
Making the Links, NW Leics & S Derbys (SRB6)	800 (4 years)	2,883	Enhancing employment, skills and employability; Improving health, reducing crime and promoting community involvement.
NW Leicestershire and South Derbyshire Rural Priority Area 99-02 (EMDA)	1,681 (3 years)	11,600	Diversification and development of the economic base; Strengthening of local service functions; Enhancing the local environment; Strengthening and improving local skills/training.
Leics & S Derbys Rural Priority Area Foot &Mouth Programme 2001-04 (EMDA)	827 (3 years)	2,355	Further assistance to the Coalfield Area to alleviate the impact of the Foot and Mouth crisis.

The Programmes are typically broadly based, seeking to achieve a range of economic, social and environmental objectives and outputs. Table 40 takes the Rural Priority Area Rural Development Programme operated by the Leicestershire and South Derbyshire Coalfields Regeneration Partnership as a case study. This Programme is focused around a number of 'Drivers of Change': Learning and skills; Enterprise and innovation; ICT revolution; Climate for investment; and, Sustainable communities. The data contained in Table 40 was gathered in 2002-2003 as part of the monitoring and evaluation of the coalfield programme and represents the whole programme and not just The National Forest element.

Table 40: Rural Development Programme outputs (2002-2003)

Code	Output label	Target
1	No of advice schemes	50
2	No of businesses advised	68
3	No of people advised	3098
4	No of start-up businesses advised	6
5	No of counselling sessions	340
6	No of existing businesses expanded	4
7	No of additional enquiries	50
8	No of businesses coming into the area	*
9	No of new business start-ups	7
10	No of product development/marketing initiatives	194
11	*	*
12	Amount of inward investment per annum	*
13	*	*
14	Area of land developed for open space	5025
15	*	*
16	No of additional community groups or trusts	49
17	No of people using new/improved facilities	3569
18	No of people using new/improved facilities	10
19	No of childcare places created	90
20	No of community facilities established/created	11.88
21	No of community facilities improved	12
22	No of community participants	1849
23	No of community services established/created	24
24	No of community services improved	152
25	No of people in identified priority group assisted	860.4
26	Study reports-general	6
27	No of networks created/established	15
28	No of networks improved	*
29	No of officers/workers/posts	84
30	No of projects generated	1
31	*	*
32	No of full time job opportunities created	85
33	No of target population obtaining jobs	26
34	No of jobs secured	31.6
35	*	*
36	*	*
37	No of additional visitors	3950
38	No of attractions built or upgraded	2
39	No of pitches provided	*
40	*	*
41	*	*
42	*	*
43	No of training places created	427
44	No of people attending seminars/conferences	173
45	No of people trained, obtaining qualifications	65
46	No of seminars/conferences	27
47	No of training weeks provided on formal training courses	1104
48	No of training places provided	399
49	*	208
50	No of new vehicles provided	0.5
51	No of additional vehicles or enhanced vehicles provided	194
52	No of new routes approved	1.6
53	*	4
54	*	120
55	No of target population provided with transport to facilities or services	120

NB. * Data not available Source: Meridien Pure

11.2 Regeneration projects

Within the regeneration programmes outlined in Section 11.1, a number of projects have been developed which have a particular relevance to The National Forest. The Forest has also attracted a number of discrete funding awards for specific projects. Table 41 includes some case studies, together with examples of awards from other external funding sources. The list is not intended to be comprehensive, rather to give an indication of the level and range of activity in the Forest area. It includes selected awards with particular relevance to the work and aims of the NFC. Table 41 lists awards made to projects during the period 1999-2002. A small number of awards that were made prior to 1999 are also included because they were omitted from the 2001 Study. It should be noted that the grant secured may be spent over several years and that in many instances it has been matched by other funds to meet the full cost of the project.

Table 41: Key external funding awards (1999-2002)

Project	Funding secured £ '000s	Funding programme	Key impacts
Programmes			
Burton – Investing in Inclusion			
Enhancing the Washlands and Town Centre Area	347	Burton Community P'ship SRB6	Enhanced community woodland/ riverside frontage; Rangers; Promotional activity.
Open Space Development	226	Burton Community P'ship SRB6	Environmental improvements and amenity provision; Rangers.
Leicestershire and South Derbyshire Coalfields Regeneration Partnership			
Land acquisition, site development and tourism enhancement	165	Rural development area/foot and mouth programme	Creation and improvement of forest sites and facilities, creation of demonstration projects, support for rural diversification and training.
Funding sources			
Aggregates Levy Sustainability Fund			
Central Rivers Initiative	187 235	Via Countryside Agency	Integrated land management and improvement in the Trent and Tame valleys. New footbridge over River Tame.
British Trust for Conservation Volunteers			
National Forest Project	100	Landfill Tax, sponsorship and local authority	Establishment of BTCV team in The National Forest and operational programme for 3 years.
Business in the Community			
Ibstock Community Enterprises (ICE)	100	Better Towns Competition	Support for village based enterprise trust.
Corporate sponsorship to the NFC			
Various (1999-2003)	665	Private sector sponsors	Land acquisition and development and support for education and community involvement programmes.

English Partnerships			
National Forest sites 1998-2002	683	English Environment Fund	Environmental improvement schemes for contaminated, derelict and under-used land; and to revive areas around former coalfield sites.
Thornborough Road, Coalville	247	EP Grant-in-Aid (EMDA)	Part of the National Coalfields Programme.
Rawdon	2,877	EP Grant-in-Aid (EMDA)	Development of the National Forest Millennium Discovery Centre at the former Rawdon Colliery.
Environment Agency			
*Croxall and Kelham Bridge	55	Capital grants	Site development for conservation and floodplain management.
Heritage Lottery Fund			
*The National Forest – Heritage in the Making	478	Landscape and heritage	The LandShapes project will record the cultural and physical history of The National Forest as the new landscape is emerging.
Sharpe's Resource Centre	997	Historic buildings and sites	The best surviving pottery in Swadlincote has been restored and brought back into use as arts resources and community space - raising cultural and heritage awareness in the community.
Swadlincote Urban Parks – Restoration Plan and work to the Maurice Lea Memorial Park	41	Countryside and nature Conservation	Feasibility study for three Swadlincote Parks and restoration of Maurice Lea Memorial Park.
Grace Dieu Priory Ruins Restoration	340	Historic sites and buildings	The remains of Grace Dieu Priory will be conserved. The site will be opened to the public, becoming a tourist attraction and allowing people to learn about the area's history.
Highways Agency			
A38, M42/A42 and M1	80	Capital works	Increased roadside planting.
Landfill Tax Credit Scheme			
Various forest sites and projects	412	Nature conservation and sustainability	Site purchase and development, woodland research and composting projects.
Leicestershire County Council (specific grants, does not include extensive funding for and administration of other programmes)			
Forest sites	30	Shire Grants	Site acquisition and development.
Various	212	Shire Grants	Environmental and community projects throughout the Forest area.

Local Heritage Initiative			
Three projects involving National Forest sites (St Bride's Project Group, Ibstock Grange History Project and The Melbourne Clearance Areas)	23	Heritage Lottery Fund	Projects involve the investigation, interpretation, restoration and promotion of archaeological and historical features.
Millennium Commission			
Conkers additional awards	450	Millennium Fund	Improvements to existing facility.
National Memorial Arboretum (Alrewas)	1,883	Millennium Project	A place of remembrance and memorial to those who lost their lives in conflicts in the twentieth century.
Donisthorpe Miners Welfare	1,600	Coalfield Landmarks, EMDA and others	New premises including a large function room, bar and restaurant, health and fitness suite, training room and crèche.
Moira Village Hall	493	Millennium Commission Landmarks	Construction of a new village hall/access centre including training, education, childcare, advice sessions, healthy living as well as social facilities. Also funded by EMDA and Landfill Tax.
Coton in the Elms Village Hall	185	Coalfield Landmarks and EMDA	Improvement of community facilities serving the coalfield community. Also supported by district and parish councils.
Sports Lottery			
Hood Park Leisure Centre, Ashby	1,594		Redevelopment of leisure centre, including two new indoor swimming pools.
Measham Leisure Centre	832		Indoor recreation centre.
Oakthorpe Sports & Leisure Centre	409		New pavilion and floodlit Multi Use Games Area.
Walking the Way to Health			
E. Staffs Walking for Health and S. Derbys. STEPS	60	New Opportunities Fund	Healthy living programmes utilising forest sites (total programme value £115,000).

Other			
Ashby Canal Restoration (2 Phases)	3,000	EMDA, RECHAR, HLF, NFC, LCC	Restoration of Ashby Canal.

NB1: all figures rounded
NB2: * denotes an award to the NFC
NB3: Whilst every effort has been taken to eliminate double counting of grants in the above lists, it is possible given the nature of the project funding packages

The example projects included in Table 41 alone indicate an investment of some £19,006,000.

12.0 National Forest Company activity

The NFC has invested over £21m (including £4.2m through the Forestry Commission (FC) Woodland Grant Scheme) in the area since 1995 through the unique National Forest Tender Scheme (NFTS). This has enabled the creation of 145 new forest sites covering 2676 Hectares. The principal outcome of this investment is the landscape change that is necessary for the creation of The Forest, but it also brings about social and economic benefits. A new forest-related economy is being created and many farms in the area are diversifying into tourism and related activities. The NFC and FC have also invested over £2.0m in land acquisition and development. There is therefore a direct economic impact of the Forest in terms of job creation and safeguarding through these activities

This section is based upon an employment impact survey undertaken by the NFC in 2003 in order to monitor the effects of their investment amongst the Company's partners, contractors and suppliers. In addition to the main findings, the survey revealed that the employees of organisations successful under the Tender Scheme had undertaken significant amounts of training in order to enhance both forestry-related and more general skills. Further, around a quarter of the organisations responding to the survey felt that their business had improved as a result of their involvement with the National Forest – the Tender Scheme had either:

- released funds locked-up in land that was subsequently re-invested into their original business;
- created new opportunities via the improvement and re-use or conversion of agricultural buildings and land; or,
- enhanced the beauty, and both environmental and amenity value of their land to visitors and locals alike, therefore attracting tourism and improving their business.

12.1 Forest related investment in the local economy

Jobs created and safeguarded in forestry, nurseries and contractors and landscaping (Indicator 31)

Table 43: Employment creation as a result of investment in The Forest(1995-2003)

Partner/supplier	Direct jobs	Indirect jobs	Safeguarded
Forest companies	17.5	2	1+
Tree nurseries	-	21	-
Woodland Trust	1.5	-	-
Rosliston Forestry Centre	21.5 (+6-10 casual)	-	-
Conkers	46.5	-	15
BTCV	1	-	-
NFC	18.5	-	-
Total	**106.5 (+6-10 casual)**	**22**	**16+**

Source: NFC

Table 43 reveals that during the period 1995-2003 the activity of the Company has directly created over 100 jobs, indirectly created a further 22 and safeguarded more than 16.

12.2 National Forest Tender Scheme

Jobs safeguarded and created through the National Forest Tender Scheme (Indicator 32)

Table 44: Employment creation as a result of the NFC Tender Scheme (1995-2003)

Programme	Direct jobs	Indirect jobs	Safeguarded
Tender Scheme	27	25+	16.3

Source: NFC

The NFC has also monitored the specific employment impact of the National Forest Tender Scheme. Table 44 reveals that between 1995 and 2003 the Scheme led to the creation of 27 jobs directly and more than 25 indirectly. It also safeguarded a further 16.3 positions.

13.0 The views of key decision makers

13.1 Introduction

In parallel with the extensive data collection and collation completed as the major element of the *Much more than trees* impact research, a selective qualitative consultation exercise was conducted by the consultants. This focused on 'key decision makers and influencers' in the Forest area, and involved interviews with senior individuals - such as local authority chief executives and managers of hotel chains. This was designed to explore their views on the past and future social and economic effects of The National Forest. A copy of the questionnaire employed may be found at Annex Four, together with a list of respondents.

The questionnaire addressed key issues such as awareness and understanding of the objectives of The National Forest; perspectives on the progress that has been made to date; expectation for the future (by 2010); and, sought views on the measures necessary to sustain the socio-economic impact of the Forest in the future.

13.2 The social and economic achievements of the Forest

There is a general and wholly expected view that it is still early days for isolating the wider social and economic impact of The National Forest. However, there are also widely recognised early effects, and positive expectations amongst key player agencies and organisations. In essence, The National Forest is seen as generating a *"unifying vision for what the area could become"* (Peter Williams, Leicestershire County Council), as well as making good progress in planting against challenging targets that will have an important outcome for community and business development.

Clearly, planting has been more intense in some parts of the Forest area than others. This is unavoidable during the course of the programme. Where the planting regime has generated substantive visible change, there tends to be an extremely positive reaction from all sides. In community terms, discussion with community development workers in North West Leicestershire revealed a positive reaction where the planting so far is viewed as raising the profile of the area, and providing leisure related facilities for local needs. Where there have been substantive works to tackle the scars of former mining land, local communities tend to recognise the improvements. The Forest as a catalyst emerges here as elsewhere in the consultations, with a recognition of its role in providing an *"impetus to move restoration in a positive way"*, and also, to *"tackle disability access"* (Rachel Elliott, Ibstock Community Enterprise).

In general, there is an emergent view that a *"good job has been done with (rather than to) communities"* (David Friesner, Leicestershire Promotions). That said, continued detailed involvement with communities is widely perceived to be an important quest for the National Forest Company.

It is believed that image and credibility have been important positive outcomes, with an enhanced profile for places within The National Forest. The Leicestershire Economic Partnership have identified the environment as a key selling point, and this is substantially led by the presence of The National Forest in the area. The National Forest represents an element that will be used to market and sell its constituent areas. That said, outside commentators rarely recognise the multi-purpose nature of the Forest (Peter Williams), and there is a continuous marketing job to be done.

There is wide recognition of the Forest development by businesses, and this is revealed in marketing as much as in reflections. For example, promotional material for the Express by Holiday Inn, Burton-upon-Trent hotel describes its setting as "in the Heart of the New National Forest." Similarly, Fisher German view their involvement with The National Forest as a marketing plus point.

Informal consultations with Chapmans Plant Centre in Rosliston, near Swadlincote, located adjacent to the Rosliston Forest Park, revealed the synergy between this established land-based nursery business – and the Forest initiatives. The Plant Centre and the Forest attraction will provide each other with customers.

National Forest Company actions are, it is argued, supporting the viability of the agricultural base within the Forest area, or alternatively easing the diversification route. As rural property agents Fisher German suggest, the Tender Scheme has enabled farm businesses to plant up and retain land, freeing up capital value for reinvestment or supporting diversification schemes. During the consultations, Fallowell & Partners were also able to cite examples of farms that had been afforded enhanced viability by participation in the Scheme. On these bases, the Scheme is not only supporting planting but it is also supporting local economic survival.

Elsewhere within the private sector, there is a recognition that the development schemes linked, for example, to housing, have created an environment in which innovative planting approaches have been fostered. Ian Biddulph, Group Planning and Environment Director at Wilson Bowden Plc recognises the corporate social responsibility of major local developers in responding to the opportunities that development schemes provide. That said, there is a recognition that once planting matures an attractive landscape will become a potential enhancing influence. This will undoubtedly spill over into inward investment and enhance the viability of development schemes as the landscape changes.

Local government also recognise the social and economic value of The National Forest on various levels – not least as a mechanism for building a visitor economy in areas that have perhaps underachieved in this sector in the past. Inevitably, it is particularly in the tourism arena where tourism and marketing professionals, as well as many others, recognise the step change precipitated by the Forest. Not surprisingly, professionals recognise both the tourism effects and the ongoing development challenges. As South Derbyshire Economic Development specialist David Soanes notes,

"The National Forest has had a substantial, positive impact on tourism within South Derbyshire."

David Friesner echoes such sentiments for other areas within the Forest with the view that, *"The National Forest has clearly put tourism on the map, in particular around North West Leicestershire, identified a new industry, and has been a catalyst for the development of the tourist infrastructure, in, for example, bed and breakfast establishments and barn conversions."*

Those in other parts of The National Forest widely concur with this view that the enhanced potential of the visitor economy is a major and immediately discernible outcome from the initial period of National Forest development.

There are also less obvious or overt social and economic effects that would be difficult to identify from data series at any time. For example, the initiative is viewed by many as a catalyst and purveyor of professional support. John Oakes, said that,

"National Forest Company involvement in the Made in Swadlincote Partnership significantly enhanced our bidding credibility and the outcome of the scheme."

Regeneration spin-offs are also widely recognised through stimulation as a consequence of The National Forest 'catalyst'. Investment in Swadlincote is seen as a phenomenon that might not have been so extensive in the absence of the Forest initiative and vision (David Soanes, South Derbyshire District Council). More directly, North West Leicestershire District Council view The National Forest initiative as a major catalyst for the levering in of external funding. As Regeneration Manager, Steve Dibnah noted, The National Forest has been *"able to provide a future vision for the heart of North West Leicestershire that has enabled us to access central government and European funding".* However, as others argue, the Forest is a 'soft' benefit and it is still hard to compete with areas that have access to wider arrays of external funding and hence more opportunities to create regeneration conditions.

13.3 Future expectations

The National Forest project represents another facility in the armoury of features that will be used to market and sell its constituent areas. For example, as John de Kanter of InStaffs (UK) Limited argues, *"inward investment is more and more about lifestyle – an amenity of this scale and intensity must have a substantial effect."* Such views are repeated and reinforced across the Forest area.

As the planting matures, then there is every expectation of greater impacts to be precipitated by the Forest. This will help to further lessen negative perceptions of the derelict, former mining landscape. More visitors are likely, and it is anticipated that more tourism developments will generate longer stays and overnight visitors. However, whilst the Forest is viewed as a key tourism stimulant there is a note of caution. New stand alone attractions must be developed and encouraged, and there is a need to parallel planting with improved access and activity opportunities if a stream of visitor income is to be generated (David Friesner). As Nick Hodgson, Chief Executive at Derbyshire County Council, said,

"The National Forest will inevitably prove to be an important tourist destination as long as there is sufficient development around and within it."

Property agents perceive substantial long-term benefits. As Mike Fallowell suggested, *"The National Forest will contribute to making the area a better place to live"*; increased attractiveness will enhance the housing market, providing a foundation for regeneration. That said, there are challenges anticipated for private land acquisition, particularly in locations outside of the former coal mining areas – such as Charnwood and Needwood – where there appears to have been less interest in involvement. Moreover, the spectre of rising house prices and thus local economic prosperity is seen as a mixed blessing for some communities, where such potential trends are viewed as detrimental to the low income segments of the former mining communities.

13.4 Actions to sustain the social and economic impact

Part of the survey work focused on awareness. In such terms, there was a good level of understanding of the general aims and ethos of The National Forest, but not particularly wide awareness of its precise objectives. As emerges from the consultations, perhaps there is a continuing need to more actively market the achievements so far, and to engage more widely and fully. The results of the present research provide an opportunity in this regard.

Of course, the Forest is widely recognised as a long-term action. As Russell Eales of the Express by Holiday Inn said during the consultations,

"The National Forest project is a long-term investment that will pay great dividends for the next generation,"

"it's the kids and education that are the essential building block for the future."

This all partly links to the question of The National Forest effect and its concern for the local communities. John Oakes (Made in Swadlincote Partnership) reinforced this view when he said that,

"it is more than just an imposed treescape – it has set out to integrate itself with the aspirations of the community."

Stronger community involvement was also cited by some of those consulted. Some held the view that whilst there is a recognised need for strong community participation by The National Forest Company, and real efforts being made, there doesn't appear to be a clear understanding of how best to make that happen. As Rachel Elliott stated, *"engagement targets are soft but vital."*

Of course, sustainability of effects requires the development of supporting infrastructures, something that is not necessarily within the control of The National Forest Company. A number of those consulted referred to the transport theme – the need to solve transport problems, and especially to assess the needs for visitor development and car-based access.

In addition, there is wide acceptance of the need to encourage the development of forest-based visitor activities in order to enhance economic developments by providing attractions that generate income.

Forest development issues were cited by some – in particular the need to sustain planting occurring within the Tender Scheme beyond the initial ten years. More generally, there is a recognition of the need to manage and control the woodland when it reaches its maturity. Indeed, the question of sustainable management – in particular the costs involved - is something of a concern for many of those consulted during the work.

Several respondents stressed the need, no doubt part of The National Forest Company forward strategy, to consider forest-based product markets and to further explore commercial markets for timber outputs.

13.5 Other emergent themes

Whilst not the focus of the consultation, those consulted during this phase of the impact research were universally positive about the quality of the National Forest Company and its activities. For example, in John Oakes' view,

"the enthusiasm of individuals within The National Forest Company has been a major factor in its success – a corporate strategy needs to be supported by enthusiastic and committed people."

Again, Charles Meynell of Fisher German, holds the view that,

"prudent land purchases by The National Forest Company have helped to maintain land prices and to sustain and mirror the national and regional trend."

In terms of environmentally friendly business development, the Forest could, according to some commentators, prove to be a "*shop window of how it should be done*".

Finally, there is the issue of the emergent and strengthening partnership that has been precipitated by the initiative. The National Forest initiative has brought local authorities and others together, and provided a forum within which a solid partnership has evolved. This theme, a real positive, emerged during discussion with a number of the senior local authority representatives in the survey.

13.6 Suggestions

Much of the consultation work generated particularly positive feedback on the challenges and achievements of The National Forest by late 2003. That said, there were rejoinders and some, albeit positive, notes of caution expressed and these are reported in the spirit of constructiveness within which they were offered.

Some respondents mentioned the issue of signage. This, it was felt, raises expectations too much at present. Instead of 'Welcome to The National Forest' in places where there is no visible effects, it might be prudent to say 'Welcome to The National Forest - working towards the forest of the future'. That said, this is, of course, less of an issue where there are signs of planting growth.

Others referred to the need for stronger communications and a raised profile – accepting that this is probably a resourcing issue but suggesting that the National Forest Company could offer more lectures, and perhaps generate more literature proactively focused on delivering the message. There was a suggestion that targeting could be focused on schools and education. In essence, there was a feeling that stronger marketing to increase the brand and raise awareness would be beneficial.

Part of this strengthening could involve additional actions to foster community partnership. The community could also be further encouraged, perhaps with stronger community ownership and involvement through 'community champions'.

Whilst there was a widely held view that the planting strategy and performance had been very successful, some reflected on a need to push for wider economic investment opportunities outside of timber – a fully developed cycle and footpath network is still needed and whilst much has been done, this remains a challenge for the Forest. Visitor income in the future will largely depend on such infrastructure developments.

A number of respondents mentioned the need to sustain the impact by avoiding any regionalisation of activity. According to this line of thought, The National Forest needs to be able to coordinate across the regions, in particular as perspectives differ. There is also a view, held at senior level within some local authorities, that whilst the Forest has been a significant and positive force, it will only achieve a sustainable economic and social effect if it is able to operate as a sub-region and surmount the multi-authority constraint imposed by the vicissitudes of thirteen governmental and associated partners.

14.0 Summary

14.1 Introduction

In this final section, we reflect on the material presented in the preceding Report. Following a brief review of data quality and robustness issues – and some comments on the future comparability and monitoring capability that should follow from the project, we summarise and discuss some of the key outcomes from the work in the light of the objectives of *Much more than trees 2*.

It is important to note that the following conclusions are drawn in the light of the limitations expressed in Sections 2.3 and 3.4. Whilst constraining the statements that may be made, efforts have been made to overcome any data limitations. That said, for a number of reasons, comparability with the 2001 Study is not directly possible in many cases. This follows from a number of factors linked to calculation methods, data availability, and definitional changes - issues that have been identified and discussed in preceding sections. In addition, the emergence of recommended standard indicators provides an opportunity to set in process a genuinely durable baseline approach.

14.2 Revisiting the objectives

As initially set out in Section 2.2, the objectives of the project are encapsulated in the following. The work has been designed to:

- establish a clear view of key trends in the National Forest area - this has been completed through the development of profile indicators (Table 2) that are comparable with other areas in terms of interpreting change over time;

- provide an improved basis for the periodic future assessment of the socio-economic impact of the Forest over time - the profile indicators enable this improvement;

- make a judgement on the impact of the Forest in terms of a range of core social and economic indicators - profile measures assist this process and are supplemented with direct and indirect impact analysis; and,

- contribute to the developing remit and objectives of the NFC, and to deliberations and debate on the revised National Forest Strategy and the future progression of the initiative - whilst the work as a whole will support this task, later in this section, suggestions and recommendations are drawn from the analyses and consultations conducted during the research period.

14.3 The profile of The National Forest in 2004

Following the analysis of data series in previous Sections, we have been able to generate summary points on the broad nature of The National Forest area profile.

The following characteristics and trends may be identified:

- a population of 200,047 people, roughly equally split between males and females;
- an age structure similar to England and Wales, though with a slightly smaller 25-44 age group;
- a very small population from black and minority ethnic groups but with some significant concentrations such as in Burton upon Trent;
- an expanding population, increasing marginally more quickly than the national average;
- growing employment rates, above regional and national averages;

- a changing employment structure, with growing numbers of jobs in sectors such as forestry, construction, tourism, finance and services - and declining employment in manufacturing, transport and communications;
- an increasing number of jobs, well above regional averages;
- levels of self-employment in line with regional and national averages;
- an occupational profile oriented towards manual trades, likely to be a reflection of the area's still significant manufacturing and construction sectors;
- falling unemployment, particularly amongst males, to levels below regional and national averages;
- a significant fall in long term unemployment, further below regional and national averages;
- average earnings below regional averages, with male earnings in particular failing to keep pace with earnings growth in recent years;
- pockets of deprivation, particularly in the inner areas of Burton upon Trent and the coalfield communities of North West Leicestershire and South Derbyshire;
- overall levels of benefit dependence below regional averages and declining more quickly than the regional averages;
- health levels similar to regional and national averages, though slightly poorer for males than females;
- real (hidden) unemployment substantially above official figures, but also showing evidence of improvement;
- car ownership and multiple car ownership above regional and national averages;
- growing numbers of businesses with rates per 10,000 population above regional and national averages; and,
- evidence of high levels of public and private investment through regeneration projects and programmes.

The National Forest profile thus emerges as an area that, whilst constrained by some of the characteristics of traditional agricultural or mining communities and their economic and social needs, does not particularly reflect such needs. In general terms – there is little evidence of the widespread socio-economic problems – such as low entrepreneurship, high unemployment, or housing market failure – that are often associated with former coalfield areas. The National Forest has a relatively healthy socio-economic profile, performing well in comparison with the East and West Midlands regional averages. Levels of earnings would possibly be the only area of real concern. There is evidence of pockets of deprivation relating to the decline of traditional industries within the Forest area – including inner areas of Burton upon Trent and particular coalfield communities within South Derbyshire and North West Leicestershire. Moreover, hidden unemployment is evident.

Yet, in general, the picture is relatively positive, particularly in comparison with other former coalfield areas such as South Wales and South Yorkshire. Though the Studies are not always directly comparable, it is apparent that the positive progress found in the 2001 Study has been maintained.

14.4 Direct and indirect effects of actions initiated by The National Forest

Aside from establishing the social and economic profile of The National Forest, it is possible, even at this relatively early stage in the development of the actions initiated by the National Forest Company, to tease out some direct and indirect effects. Direct effects refer to outcomes that are directly attributable to The National Forest and the actions of the National Forest Company; indirect effects are outcomes where there is a less demonstrable but nonetheless discernible or arguable relationship between an element of change and the existence of The National Forest. That said, it must be noted that, in many instances, the effects of The National Forest are likely to be one of a range of factors operating at any particular time.

The National Forest has already contributed significantly to:

- the nurturing of a more positive outlook within businesses and communities located within the Forest area, and a vision for its future sustainable regeneration;
- employment creation and safeguarding of jobs in sectors directly related to the NFC's role – including forestry, conservation and tourism;
- employment creation and safeguarding amongst beneficiaries of the National Forest Tender Scheme;
- a growing investment in the local economy via the National Forest Tender Scheme; where,
- from qualitative evidence, it seems clear that National Forest actions have directly supported diversification and contributed to the survival of some farms in the area; and,
- success in securing external funding for particular Forest-related projects from a range of sources.

In addition, there is evidence of less direct effects. These include:

- some limited evidence as yet, on the emergence of a healthier property market in terms of house prices than is likely to have been the case without The National Forest;
- a continued predominance of day visitors, accompanied by a growth in bed nights per annum, probably associated with an increase in holiday and business visits; and,
- a growth in average spend per visitor, arising from an increasing day visitor spend.

14.5 Some key viewpoints on The National Forest

Part of the work completed for the *Much more than trees 2* involved qualitative survey work with a selection of 'key decision makers and influencers' whose professional activity involves The National Forest in some significant way. This supplementary material provided some useful insights. In essence, the outcomes from this were as follows.

The social and economic impact of The National Forest

- there is a general and wholly expected view that it is early days for isolating the wider social and economic impact of The National Forest;
- however, there are also widely recognised early effects, and positive expectations amongst key player agencies and organisations. In essence, The National Forest is seen as generating a *"unifying vision for what the area could become"* , as well as making good progress in planting against challenging targets that will have an important outcome for community and business development;
- where the planting regime has generated substantive visible change, there tends to be an extremely positive reaction from all sides;
- discussion with community development workers revealed a positive reaction where the planting so far is viewed as raising the profile of the area, and providing leisure related facilities for local needs;
- where there have been substantive works to tackle the scars of former mining land, local communities tend to recognise the improvements;

- it is believed that image and credibility have been important positive outcomes, with an enhanced profile for places within The National Forest;

- there is wide recognition of the Forest development by businesses, and this is revealed in marketing as much as in reflections;

- National Forest Company actions are, it is argued, supporting the viability of the agricultural base within the Forest area, or alternatively easing the diversification route;

- elsewhere within the private sector, there is a recognition that the development schemes linked, for example, to housing, have created an environment in which innovative planting approaches have been fostered;

- local government recognise the social and economic value of The National Forest on various levels – not least as a mechanism for building a visitor economy in areas that have perhaps underachieved in this sector in the past;

- there are also less obvious or overt social and economic effects that would be difficult to identify from data series at any time. For example, the National Forest Company is viewed by many as a catalyst and purveyor of professional support; and,

- regeneration spinoffs are also widely recognised through stimulation as a consequence of The National Forest 'catalyst'.

Future expectations

- The National Forest project represents another facility in the armoury of features that will be used to market and sell its constituent areas;

- as the planting matures, then there is every expectation of greater impacts to be precipitated by the Forest;

- this will help to further eradicate perceptions of the derelict, former mining landscape. More visitors are likely, and it is anticipated that more tourism developments will generate longer stays and overnight visitors; and,

- property agents and developers perceive substantial long-term benefits; increased attractiveness will enhance the housing market, providing a foundation for regeneration.

Actions to sustain the social and economic impact

- The National Forest is widely recognised as a long-term initiative that needs ongoing actions to realise its social and economic potential;

- stronger community involvement was cited as a need by some of those consulted, particularly where the greatest rate of change is occurring;

- the sustainability of effects requires the development of supporting infrastructures, whether in transport, tourism, or other areas; and,

- there is wide acceptance of the need to encourage the development of forest-based visitor activities, in particular attractions that will generate income, in order to maximise the potential of the visitor economy.

Other emergent themes

- those consulted during this phase of the impact research were universally positive about the quality of the National Forest Company and its activities;
- in terms of environmentally friendly business development, the Forest could, according to some commentators, prove to be a "shop window of how it should be done"; and,
- there is also the issue of the emergent and strengthening partnership that has been precipitated by the initiative. The National Forest initiative has brought local authorities and others together, and provided a forum within which a solid partnership has evolved.

14.6 Some comparisons between the 2001 and 2004 Report findings

In summary, the 2001 Report concluded that The National Forest area revealed: above average population growth; a buoyant housing market; low unemployment; generally below average levels of social deprivation; falling fertility rates and rising death rates but expected inward migration; stable levels of those in the primary school age categories; more manufacturing and fewer service jobs that the national average; and with tourism of growing importance to the local economy (The National Forest: Social and Economic Impact Study, UDRES Report 51, Derby, January 2001, p25).

The 2004 Report has been able to focus on a much wider range of issues and indicators, and to explore the fine detail of The National Forest social and economic profile. Moreover, there are substantial technical constraints in making comparative assessments. However, there is some value in drawing some basic comparisons with the late 1990s position recorded in 2001.

These show that many of the trends identified in 2001 have continued, albeit with some positive signs of improvement. The National Forest area: continues to record above-average population growth; maintains its status as a relatively healthy residential property market; remains a low unemployment area in terms of registered claimants; has a slightly above-average growth in younger age categories, and, whilst still focused on manufacturing rather than service trades, has a relatively high service sector employment growth rate, and reveals itself as a growing focus of visitor demand within an expanding tourism and leisure economy.

14.7 Conclusion

In this Report we have been able to set out a detailed profile and assessment of The National Forest area and to identify some of its early social and economic effects. A series of robust indicators aligned to government statistical collection and recommendations have been established and, in most cases, presented in the preceding sections.

The establishment of a picture of community and business within The National Forest area will undoubtedly contribute to the developing remit and objectives of the NFC. It will provide a background to future decisions and ultimately a benchmark against which to appraise, assess and evaluate the achievements of The National Forest. Qualitative survey findings have allowed us to report a range of constructive comments that might be considered in future strategy and decision-making, and the debate that will follow the publication of the Report will, we anticipate, generate ideas and implications for future policy. The general view is that The National Forest is well on course to create a major step change for its area and to build from what has clearly been a positive and promising start.

Annex

One	Maps of The National Forest area
Two	Socio-economic indicators
Three	Ward list and proportioning
Four	Questionnaire and respondents
Five	The Centre for Economic and Social Regeneration

Annex One: Maps of The National Forest area

(Map 1 Location of The National Forest)

(Map 2 Administrative Boundaries)

(Map 3 Ward Boundaries)

Annex Two: Socio-economic indicators

	Indicator	Audit Commission designation	Available at ward level	Robustness/ frequency updated	Survey required to collect data	Indicator purpose and applicability	Headline indicator	Year of data
	Demographic profile							
1	Total number of people living in the National Forest area categorised by: gender; age bands; ethnicity	ECR10a	ü	High 10 years (Census)	û	Profile	ü	2001
2	Percentage change in total population by age bands	ECR10c	ü	High 10 years (Census)	û	Profile	ü	2001
	The workforce							
3	Proportion of people of working age in employment	QoL1	û District	Medium Quarterly (LFS)	û	Profile	û	2001
4	Total number of local jobs by sector	ECR3	û District	Medium Annual (ABI)	û	Profile	û	2001
5	Percentage increase or decrease in the number of local jobs	QoL5	û District	Medium Annual (ABI)	û	Profile	ü	2001
6	Extent of self employment		û District	Medium Quarterly (LFS)	û	Profile	û	2001
7	Occupational profile		ü	High 10 years (Census)	û	Profile	û	2001
8	Proportion of the working age population who are unemployed	ECR2a	û District	Medium Quarterly (LFS)	û	Profile	ü	2001
9	Average annual earnings for full-timers	ECR4a	û District	Medium Annual (NES)	û	Profile	û	2002
10	Average wages per week		û District	Medium Annual (NES)	û	Profile	û	2002

	Indicator	Audit Commission designation	Available at ward level	Robustness/ frequency updated	Survey required to collect data	Indicator purpose and applicability	Headline indicator	Year of data
	Deprivation							
11	Proportion of the population who live in wards that rank within the most deprived 10% and/or 25% wards in the country	QoL6a QoL6b	ü	High Periodic (ODPM)	û	Profile	ü	2000
12	Percentage of population of working age who are claiming key benefits	QoL7	ü	Medium Annual (ONS/Benefits Ag)	û	Profile	û	2000
13	Proportion of the unemployed people claiming benefit who have been out of work for more than one year	QoL2	û District	High Monthly (Claimant Count)	û	Profile	û	2002
14	Income support claimants as % of population (over 16)		û District	Medium Annual (ONS)	û	Profile	û	2000
15	Death rate by cause (Standardised Mortality Ratio)	QoL10	û District	Medium Annual (ONS)	û	Profile	û	2002
16	Real (hidden) unemployment		û District	Medium Periodic (CRESR)	û	Profile	û	2002
17	Extent of car ownership		ü	High 10 years (Census)	û	Profile	ü	2001
	Housing							
18	Average property price	ECR8a	û District	High Quarterly (Land Registry)	û	Indirect	ü	2002
19	Housing completions		û District	Medium Annual (Local Authority)	ü	Indirect	û	2002-2003
	The economy							
20	GDP/head and growth in GDP/head		û District	Medium Periodic (ONS)	û	Profile	û	

	Indicator	Audit Commission designation	Available at ward level	Robustness/ frequency updated	Survey required to collect data	Indicator purpose and applicability	Headline indicator	Year of data
21	Total number of VAT registered businesses in the area per 10,000 population	ECR7a	û District	High Annual (VAT registrations)	û	Profile	Headline	2002
22	Percentage increase or decrease in the total number of VAT registered businesses in the area	QoL4	û District	High Annual (VAT registrations)	û	Profile	û	2001-2002
23	Business stock: formation rates and failure rates		û District	High Annual (VAT registrations)	û	Profile	û	2001
24	Total number of inward investment enquiries dealt with per annum	ECR18a	û District	Low Annual (Local Authority)	ü	Indirect	û	2002-2003
	Tourism							
25	Day visitors per annum	ECR15a	û Forest area	Medium Periodic (HETB)	ü	Indirect	ü	2002
26	Bed nights per annum	ECR15b	û Forest area	Medium Periodic (HETB)	ü	Indirect	û	2002
27	Average spend per visitor	ECR15c	û Forest area	Medium Periodic (HETB)	ü	Indirect	ü	2002
28	Employment in tourism		û Forest area	Medium Periodic (HETB)	ü	Indirect	û	2002
	Forest-related education and training							
29	Number of training opportunities – courses at FE colleges – in agriculture, environment/conservation, horticulture, forestry, catering and leisure/tourism		û 10 relevant FE Colleges	High Annual (FE Colleges)	ü	Indirect	û	2003-2004
	External funding							
30	Grant secured		û	Low Ad hoc (Local Authorities)	ü	N/A	û	1999-2002

	Indicator	Audit Commission designation	Available at ward level	Robustness/ frequency updated	Survey required to collect data	Indicator purpose and applicability	Headline indicator	Year of data
	National Forest Company activity							
31	Jobs created and safeguarded in forestry, nurseries and contractors and landscaping		û Forest area	High Periodic (NFC)	ü	Direct	Headline	2003
32	Jobs safeguarded and created through the National Forest Tender Scheme		û Forest area	High Annual (NFC)	û	Direct	Headline	2003

Annex Three: Ward list and proportioning

National Forest ward	Total population (2001 Census)	Estimated % of ward population in National Forest	Estimated National Forest population
Charnwood			
Forest Bradgate (part)	3046	100	3046
Loughborough Nanpantan (part)	5402	0	0
Loughborough Outwoods (part)	5556	5	278
Shepshed East (part)	6416	5	321
Shepshed West (part)	6466	5	323
Total			**3,968**
East Staffordshire			
Anglesey	5835	100	5835
Branston	7040	100	7040
Brizlincote	5087	100	5087
Burton (part)	2127	100	2127
Crown (part)	2532	10	253
Eton Park (part)	5378	75	4034
Horninglow	7828	100	7828
Needwood	5386	100	5386
Shobnall	6130	100	6130
Stapenhill	7900	100	7900
Stretton (part)	7763	25	1941
Tutbury and Outwoods (part)	5260	15	789
Winshill	8115	100	8115
Yoxall (part)	2490	95	2366
Total			**64,831**
Hinckley and Bosworth			
Barlestone, Nailstone and Osbaston (part)	3258	5	163
Cadeby, Carlton and Market Bosworth with Shackerstone (part)	3189	0	0
Groby (part)	6747	20	1349
Markfield, Stanton and Fieldhead	5661	100	5661
Newbold Verdon with Desford and Peckleton (part)	7946	0	0
Ratby, Bagworth and Thornton (part)	5698	70	3989
Total			**11,162**
Lichfield			
Alrewas and Fradley (part)	4686	60	2812
Mease and Tame (part)	3383	10	338
Total			**3,150**
North West Leicestershire			
Appleby (part)	2091	15	314
Ashby Castle	2632	100	2632
Ashby Holywell	4420	100	4420
Ashby Ivanhoe	4526	100	4526
Bardon	2225	100	2225

Breedon (part)	2376	0	0
Coalville	4496	100	4496
Greenhill	6891	100	6891
Hugglescote	4189	100	4189
Ibstock and Heather	6709	100	6709
Measham	4849	100	4849
Moira	4676	100	4676
Oakthorpe and Donisthorpe	2336	100	2336
Ravenstone and Packington	2381	100	2381
Snibston	5055	100	5055
Thringstone	4325	100	4325
Valley (part)	4013	85	3411
Whitwick	6490	100	6490
Total			**69,925**
South Derbyshire			
Church Gresley	4805	100	4805
Hartshorne and Ticknall (part)	4647	100	4647
Linton	4700	100	4700
Melbourne (part)	4599	50	2300
Midway	7229	100	7229
Newhall and Stanton	6963	100	6963
Repton (part)	4635	5	232
Seales	4723	100	4723
Swadlincote	6522	100	6522
Woodville	4890	100	4890
Total			**47,011**
Total			**200,047**

NB. Estimated percentage of ward population in National Forest rounded to nearest 5%

Annex Four: Respondents and questionnaire

The following individuals were interviewed as part of the qualitative analysis and the consultation team is grateful for their involvement.

John de Kanter	Chief Executive	InStaffs (UK) Limited
Tony Joynson	Inward Investment Coordinator	InStaffs (UK) Limited
Nick Hodgson	Chief Executive	Derbyshire County Council
Russell Eales	Group IT Manager	Express by Holiday Inn
John Oake	Chair	Made in Swadlincote
David Soanes	Economic Development Manager	South Derbyshire District Council
Heather Bell	Economic Development Assistant	South Derbyshire District Council
Charles Meynell	Partner	Fisher German
David Friesner	Head of Tourism Development	Leicestershire Promotions
Mike Fallowell	Managing Director	Fallowell & Partners
Paul Lees	Senior Assistant Surveyor	Fallowell & Partners
William Saunders	Chief Executive	East Staffordshire Borough Council
Rachel Elliott	Community Projects Manager	Ibstock Community Enterprise
Stephanie Dearing	General Manager	Royal Hotel, Ashby de la Zouche
Peter Williams	Group Environmental Manager	Leicestershire County Council
Ian Biddulph	Group Planning and Environment Director	Wilson Bowden plc
Steve Dibnah	Regeneration Manager	North West Leicestershire District Council

Much more than trees: Measuring the social and economic impact of The National Forest

Questionnaire for use with qualitative survey respondents
To be conducted in a face-to-face or telephone interview

Date:	
Interviewer:	
Questionnaire no:	
Organisation name:	
Organisation tel no:	
Name of respondent:	
Position of respondent:	

Introduction

The *Centre for Economic and Social Regeneration* at Staffordshire University is currently assessing the socio-economic impact of The National Forest on behalf of the National Forest Company. This is the second such study commissioned, following previous work in 2001, and will be published early next year.

The study aims to add a further dimension to the overall monitoring of the environmental impact of The National Forest. It involves two parts: a quantitative study of key indicators of the population, workforce and local economy, such as house values, levels of unemployment and numbers of tourists; together with a survey of 'key decision' makers in the Forest area. The latter element involves collecting views on the past and future social and economic effects of The National Forest.

The study forms part of the Company's assessment of the progress of The National Forest and provides an opportunity to influence future activities. The general results and recommendations of the work will be made available as part of the Centre's work for the Company.

The following questions relate to your organisation's views and experience of The National Forest. Would you be happy for your views to be quoted in the report and any associated publications OR would you prefer your responses to be kept confidential?

A. Awareness and understanding

i) What is your understanding of the objectives of The National Forest?

ii) What has been your involvement to date?

- Partner
- Funder
- Project manager
- Other – please state:

The aim of the NFC is to create a mosaic of land uses and activities, framed by 33% woodland cover that will enhance both the environment and the economy. The Forest aims to fulfil environmental, social and economic objectives, for present and future generations, bringing a wide range of benefits for local people, the UK as a whole and for the world environment:

- *To create a diverse landscape and enhance biodiversity.*
- *To make a significant contribution to the UK's efforts to reduce atmospheric carbon dioxide.*
- *To create a major resource for tourism, recreation and education.*
- *To provide a productive alternative use for farmland.*
- *To make a contribution to the UK's timber needs.*
- *To stimulate the economy and to create new jobs.*

B. Achievements to date

What has been the progress made to date, from the perspective of your organisation?

Generally:

Prompts:

- Business development
- Tourism
- Inward investment
- Employment/unemployment
- Infrastructure
- Physical landscape
- Image/external perceptions
- Local communities
- Housing

C. Future achievements

What do you think The National Forest will achieve in the future (by say 2010)?

Generally:

Prompts:

- Business development
- Tourism
- Inward investment
- Employment/unemployment
- Infrastructure
- Physical landscape
- Image/external perceptions
- Local communities
- Housing

D. The future

What is necessary, do you feel, to sustain over time the socio-economic impact of The National Forest?

E. Would you like to add anything else?

CESR/17/10/03

Centre for Economic and Social Regeneration, Staffordshire University,
K168 The Octagon, Beaconside, Stafford ST18 0AD Fax: 01785 353-551 Email: r.m.ball@staffs.ac.uk

Thank you for your assistance

Annex Five: The Centre for Economic and Social Regeneration

The Centre for Economic and Social Regeneration is a rapidly growing consultancy with a range of clients including regional development agencies, local authorities, regeneration organisations and European partners. The Centre is seeking to bring a new approach to regeneration consultancy, offering innovative solutions to the challenges faced by disadvantaged communities and changing local economies.

The Centre is a self-funded research and consultancy organisation based within Staffordshire University, built around extensive experience in the area of regeneration that has been developed over twenty-five years. It was established to enhance the University's role in regeneration and has successfully built a reputation for high quality work amongst the major agencies and organisations involved in local and regional regeneration, both in the West Midlands region and beyond.

The Centre is able to offer:

- a successful track record of research and consultancy on many aspects of local economic development, including a range of recent work on economic and social regeneration;
- experience of work completed at all stages of the regeneration process, from creative project initiation to retrospective policy evaluation;
- the ability to offer creative insights into regeneration needs;
- a breadth of experience that cuts across sectors and issues in regeneration, and that covers both urban and rural perspectives;
- expertise in the evaluation of partnerships and the delivery of community-based projects;
- an extensive network of consultancy and research activity, involving regeneration practitioners as well as consultants and researchers in various parts of the UK and other European regions, and, as a consequence, the ability to create project teams in a variety of regeneration fields;
- substantial experience of working in partnership with regeneration actors and agencies in various UK and other European regions;
- highly qualified Centre staff principally trained in city and regional economics, regeneration and planning; and associates with wide experience of urban and rural issues at all levels;
- an awareness of and expertise in wider concepts and approaches, including regeneration activity in a variety of other European regions; and,
- expertise in all aspects of economic and social development, including the preparation of business plans, external funding applications, project appraisals, programme evaluation, strategy development, and project development.

The Centre has particularly specialised in evaluation, project and strategy development, securing external funding, the facilitation of policy and planning developments, partnership development and survey design and completion, in both urban and rural regeneration contexts. It also stages an annual programme of conferences aimed at regeneration practitioners.

The Centre supports the delivery of a practically orientated MSc Programme in Local Economic Regeneration, as well as research students investigating regeneration issues.

If you would like to learn more about how the Centre could help you, contact us at the following address:

Centre for Economic and Social Regeneration

K168 The Octagon	Tel: 01785 353 472
Beaconside	Fax: 01785 353 551
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