Much More Than Trees 3

Socio-Economic Impact of The National Forest

Final Report

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EXECUTIVE SUMMARY

Purpose

The National Forest Company (NFC) commissioned DC Research in January 2010 to deliver a study: The **Socio-Economic Impact of The National Forest: Much More Than Trees 3.**

Much More Than Trees is a periodic review designed to capture the social and economic impact of The National Forest. This forms a major element in continuous tracking of the progress of The National Forest as a sustainable development exemplar, across economic, social and environmental domains. This report is the third review, with the first Much More Than Trees produced in 2000, and the second in 2004.

Approach

Much More Than Trees 3 has focused on a wider range of socio-economic issues and indicators, and taken understanding of the socio-economics of The National Forest a step forward. A key element of this understanding has been the **development of a bespoke statistical geography** for the Forest area, based on lower super output areas, that allows Forest level analysis of deprivation, demographic and some employment data. This has been supplemented by the data which is only available at lower tier local authority level and locally based data recorded by the National Forest Company.

Progress since 2004

In broad terms the **socio economic position of The National Forest continues to improve,** building on the positive progress identified in Much More Than Trees 2 in 2004. The process of **post coalfield regeneration has continued** and there is strong evidence that The National Forest continues to play an important role in the socio economic development of the area.

The economic profile of the area has performed well in relation to regional and national trends, and to comparator areas. **Economic activity rates outperform regional and national averages** and whilst the long term unemployment rate has narrowed significantly in relation to these averages, it remains lower. **Business growth is strong,** evidenced by VAT registrations, with strong growth in the tourism economy and steady growth in the woodland economy. The **impact of the economic down turn** is beginning to be notable in more recent datasets, but economic activity and employment rates suggest the area is **holding its own and maintaining its position** relative to wider trends and comparator areas.

The area has enjoyed **above average population growth** (particularly in the 16 to 29 and the 45+ categories) and has a relatively **healthy property market**, which has improved markedly over the lifetime of the Forest. There have also been **improvements in multiple deprivation**, although pockets remain in some former coalfield areas, such as Coalville and Swadlincote and parts of Burton upon Trent.

There is a growing sense of community engagement, cohesion and pride in the Forest as it matures. **Community and visitors' support for the Forest is strong**, as evidenced in research studies, surveys and activities linked to the Forest's creation and enjoyment. This suggests more active community participation in the area than wider, national trends.

Stakeholder and partner views

Stakeholders and partners in The National Forest have a **confident and forward looking approach**, recognising the Forest's growing economic and social potential. There is a clear **expectation that the best is yet to come in terms of socio-economic benefits**, and this provides a strong platform for future development and cooperative working, and positively positions the Forest to maximise future opportunities and developments.

The process through which the condition and aspirational comparators (Newark & Sherwood, and The New Forest) were chosen for this report highlights the socio-economic progress that has been made by The National Forest over the longer term.

At the beginning of this process, other former coalfield areas were considered as condition comparators, but their performance in terms of the Economic Deprivation Index was significantly below that of the Forest Districts (such areas included Forest of Dean, Northumberland and Copeland). Newark & Sherwood was chosen as a condition comparator as it was the nearest match to The National Forest in terms of topography and broad socio-economic characteristics. The New Forest was chosen as an aspirational comparator as it had a socio-economic profile that The National Forest could realistically aspire towards, as well as being a National Park.

The analysis contained in this report shows that The National Forest matched and outperformed Newark & Sherwood and the New Forest across a number of indicators, notably including population growth and economic activity.

Key trends

A summary of the key socio-economic trends and issues are highlighted under each of the relevant National Forest Sustainable Development Indicator themes:

Demographics and Population

- **Population growth:** Just over 211,000 people lived in The National Forest in 2008, an increase of 3.57% since 2004. This growth rate is higher than regional and national averages. The population is broadly split between males and females in line with comparator patterns.
- **Age bands:** The most significant increases are in the 16-29 age group (9.85%) and those of retirement age and above (9.10%). The population increase is slightly higher than the East Midlands average, and higher than England and the other comparators.
- **Working age population:** Rose by just under 4,000 people from 2004 to 2008, comprising 60.8% of the total population in 2008 compared to 61.1% in 2004.
- With the exception of Lichfield (which only comprises a small corner of The National Forest), **average house prices** for March 2010 range from £162,000 in East Staffordshire to £182,000 in North West Leicestershire. This is comparable to the national average, and is significantly higher than the regional averages.

Deprivation

- From a total Forest population of 211,063, 12.7% (26,898) live in lower super output areas (LSOAs) in the top 25% most deprived LSOAs, and 2.9% (6,146) of the population live in the top 10% most deprived.
- There has been an overall improvement in the relative position since 2004, but deprivation remains a priority issue in parts of the urban areas of Burton upon Trent, Swadlincote and Coalville.

Economic Growth

- From 2004 to 2007 there has been growth in **VAT registrations** in each Forest district except East Staffordshire, with North West Leicestershire showing the highest growth of 19.4%. In broad terms, growth in VAT registrations compares favourably with regional and UK averages.
- The **stock of businesses** has risen across The National Forest districts, with a percentage change that, with the exception of Charnwood, outperforms comparator areas and the regional and England averages. Performance is particularly strong in South Derbyshire and North West Leicestershire.
- The National Forest Company Monitoring Report found that in total **55.5 new Forest-related jobs were created and 12 jobs safeguarded** between 2003/4 and 2009/10. In total there have been 333.5 Forest-related jobs created / safeguarded since 1990/1.

Employment and Earnings

- **Workplace based weekly earnings** in the Forest are in line with national averages, and range from £418 in East Staffordshire, to £501 in Charnwood (although it is likely that a high proportion of workplace earnings are outside The National Forest boundary - for example around the suburbs of Leicester and in Loughborough). **Residence based weekly earnings** followed a similar pattern, with those in Charnwood being the highest (£506, slightly higher than the England average of £496) and East Staffordshire the lowest (£432, significantly below regional and other comparator averages).
- Growth in **annual workplace based earnings** across the six districts is broadly in line with regional and England averages, with Charnwood (£26,278) again having the highest, and East Staffordshire (£22,631) the lowest. **Residence based annual earnings** range from £28,016 for Lichfield (most of which is outside the Forest), to £23,083 in East Staffordshire.
- In terms of **economic activity**, there has been a fall in economic activity rates for all districts except North West Leicestershire (whilst much activity is centred around Coalville, it should be noted that significant activity is clustered around Castle Donington and East Midlands Airport, which is outside The National Forest). However, all the Forest districts out-perform the comparator areas, and the regional and England averages.
- **Employment rates** across the six districts show a fall except North West Leicestershire (where good proportion of employment will occur at Castle Donington and East Midlands Airport) and Lichfield (most of which is outside The National Forest boundary). This performance is broadly comparable to regional and national averages, suggesting such falls are linked to macro economic trends.
- There has been little change in the proportion of **income support claimants** over the past five years (5,375 in August 2009), in line with regional and England averages. However the Forest has a higher percentage than Newark and Sherwood in terms of overall claimants, and nearly twice that of the New Forest.
- The **claimant count** ranged between 1.4% and 1.9% to 2008, rising to 3.6% in 2010 (in line with the economic downturn and recession). This rise is comparable to the other comparator areas and highlights macro economic impacts of the economic downturn rather than any Forest specific trend. Whilst The National Forest had a higher rate than Newark and Sherwood and the New Forest, its rate remains below both regional and national averages.
- The **claimant count rate for those claiming for over 12 months** rose sharply in 2010, in line with wider comparator trends. Whilst The National Forest has a lower

rate than the regional and national averages, the rate went up from 7.4 to 13.7 over this time period, a much higher change.

Investment

- The National Forest Company and partners contribute directly to the local economy through **investing in the creation of the Forest**. This includes woodland planting and management, leisure and tourism infrastructure, biodiversity enhancement, rural diversification and investment in communities. Since Much More Than Trees 2, regeneration funding has shifted from area based programmes to thematic interventions. As a consequence, programmes such as SRB (including programmes in Burton and Swadlincote) have not been succeeded.
- Despite this, over **£40 million was invested in Forest related and regeneration projects** and programmes in the area from 2006/7 to date. This builds upon the £115m reported in the Exemplar of Sustainable Development report up to 2006.
- **Visitor spending** has grown from **£252m in 2003 to £287m in 2008** (14% increase). Over the same time period jobs in tourism have grown by 12% to 4,422.
- There were **8,687,000 visitor days** spent in The National Forest in 2008, up from 7,454,000 in 2003 (a rise of 17%). Average spend per visitor day has dropped slightly from £34 to £33 per day over this period.

Well being

- **Male life expectancy** in the Forest Districts is around 78 years, rising between 1 and 2 years since 2002-4. **Female life expectancy** shows a similar rise over the same time period, with life expectancy being around 82 years. Both male and female life expectancy in the Forest is in line with national trends.

Active Community Participation (and Social Justice)

- The creation of The National Forest contributes to **social justice** through engagement with and involvement of the unemployed, inner city and urban communities, black and minority ethnic communities, disabled groups, single parent families and deprived schools.
- 15% of the 25,000 people participating in the Forest's creation each year and the 35,000 children involved in **environmental education** activity are from socially excluded groups.
- Community perceptions research and citizens panel data, show **significant levels of awareness** of the impact of The National Forest's creation, with residents becoming more aware of the growing Forest in the landscape and making the connection with new public access, recreation and tourism facilities.

Catalytic impacts of The National Forest

Overall **stakeholders are very positive about the current and future potential impacts of The National Forest.** There is a clear consensus that economic partners are increasingly seeing the prospect of the maturing of the Forest as an economic entity in the short to medium term, with a number suggesting that current actions and activity (especially around woodland economy and tourism) will lead to **significantly increased impacts over time as the Forest matures**.

Many stakeholders have noted that plantings are much more visible, with a consensus amongst tourism stakeholders that The National Forest is reaching a point where it is becoming viable in marketing terms as a forest destination – it is **increasingly being seen as an emerging destination**. Therefore destination management will increasingly need to maximise the visitor potential of the Forest, and increasingly act Forest-wide to do so.

Transport, and public transport in particular, was regularly raised by stakeholders as an issue **to be addressed for the area in the medium to long term**. Whilst a developing National Forest is not the sole driver for which decisions on sustainable transport solutions will be prioritised and decided upon (including the National Forest railway line and bus development and promotion), it is important that the National Forest Company continues to be fully engaged in transport policy development across the Forest, and promotes sustainable transport activities where possible.

A number of local authority consultees highlighted **the involvement of the National Forest Company on their strategic partnerships**, particularly Local Strategic Partnerships. This commitment is a significant resource commitment for an organisation the size of National Forest Company given that the Forest is made up of six districts/boroughs, and three counties, and it reflects the importance of local authorities to The National Forest.

Some consultees highlighted the **projected number of new homes** that were to be built in South Derbyshire and Coalville, adding around 60,000 residents to the population of The National Forest. Whilst welcomed, there are concerns about how this growth (and wider growth in out-commuting trends as The National Forest increasingly gets recognised as a great place to live) might impact on jobs and housing affordability in indigenous communities.

1. INTRODUCTION

1.1 The National Forest Company (NFC) commissioned DC Research in January 2010 to deliver a study into the **Socio-Economic Impact of The National Forest: Much More Than Trees 3.**

1.2 Much More Than Trees is a periodic review designed to capture the social and economic impact of The National Forest. This report is the third review, with the first Much More Than Trees review produced in 2001, and the second in 2004.

1.3 In addition to Much More Than Trees, the National Forest Company has produced a set of Sustainable Development Indicators, which summarises progress against 20 social, economic and environmental indicators representing a balanced approach to the sustainable development of The National Forest. Produced in 2007, the indicators will be updated in 2010 using output from this report.

1.4 The specific objectives of Much More Than Trees 3 are to review and update the 2004 report and accompanying Indices of Multiple Deprivation (IMD) report, to include:

- Socio-economic policy changes in the last 5 years, using appropriate data sets that provide the most appropriate information, and the lowest level of geography.
- Stakeholder views on socio-economic progress since 2004, capturing, where possible, partner investment.
- National Forest evidence on tourism and the woodland economy and findings from recent community and business perception surveys.
- Information to update progress against The National Forest's socio-economic sustainable development indicators.

1.5 The study team would like to thank all those who have contributed to the research in terms of their time, and their data, insights and perspectives. The study team would particularly like to thank Simon Evans and Annette McGrath of the National Forest Company for their support, advice and guidance throughout the research.

Structure of the report

1.6 The remainder of this report, produced in June 2010, is structured as follows:

- Section 2 (**Overview of Approach and Methodology**) provides a simple overview of the approach and method used for Much More Than Trees 3. It focuses on the approach taken to defining The National Forest boundary for statistical purposes, the selection of comparator areas (to compare the Forest's progress against), the depth of secondary data analysis and the primary research (consultations and survey), and is supported by a number of Annexes that provide detail on the methodology.

- Section 3 (**The Socio-Economic Context for The National Forest**) examines the wider socio-economic context for The National Forest, the changes that have occurred in the last five years, and the short to medium term future plans as set out in key strategy documents. It also reviews the key changes in the socio-economic policy landscape that have taken place in the last five years (since the last research study), emphasising where The

National Forest contributes (or could potentially contribute) towards key regional, sub regional and local key strategies and plans.

- Section 4 (**Socio-Economic Impact of The National Forest**) is the main analytical reporting section, focussed on the key themes (built around the Sustainable Development Indicators) for the socio-economic impact assessment.

- Section 5 (**Catalytic Impacts of The National Forest**) provides a summary of the findings from the consultations and discussions undertaken with selected socio-economic stakeholders in The National Forest, and addresses cross cutting issues/wider catalytic effects not covered in Section 4. It includes coverage of strategic added value (e.g. strategic leadership; strategic influence; leverage; synergy; and engagement and trust).

- Section 6 (**Conclusions and Recommendations**) summarises the key aspects of socio-economic impact of The National Forest over the last five years and includes recommended areas for action to improve and sustain the socio-economic impact of The National Forest over the next five years.

- The Annexes set out the methods used in more detail, and also contain detailed tables not used in the main body of the report.

2. OVERVIEW OF APPROACH AND METHODOLOGY

This section provides a short overview of the approach and method used for Much More Than Trees 3. It focuses on the approach taken to defining The National Forest boundary for statistical purposes, the selection of comparator areas, the depth of secondary data analysis and the primary research (consultations and survey).

This section is supported by a number of Annexes to the main report that provides further detail on the methodology.

Study Methodology

2.1 The methodology is summarised in Figure 2.1. It is a five stage approach that combines review of a range of existing research (including, but not limited to, Much More Than Trees 2 and the National Forest Company's Sustainable Development Indicators); the development of socio-economic datasets based on a clear definition of The National Forest boundary; an assessment of the Forest against appropriate comparator areas: and selected discussions with a range of socio-economic decision makers.

2.2 An early challenge was the development of a **statistical definition of The National Forest boundary**. Much More Than Trees 2 used a ward-based definition, which dealt with wards that were partially inside The National Forest by proportioning ward populations to determine those within the Forest area. Over the past five years socio-economic monitoring has increasingly focused on reporting indicator performance at the lowest possible level of geography. An early decision was taken by the National Forest Company and DC Research to define The National Forest by Lower Super Output Areas (LSOA), with a 'best fit' judgement being made on an individual LSOA basis in terms of settlement and area as to whether each LSOA should be included in The National Forest (or not) for the purposes of Much More Than Trees 3.

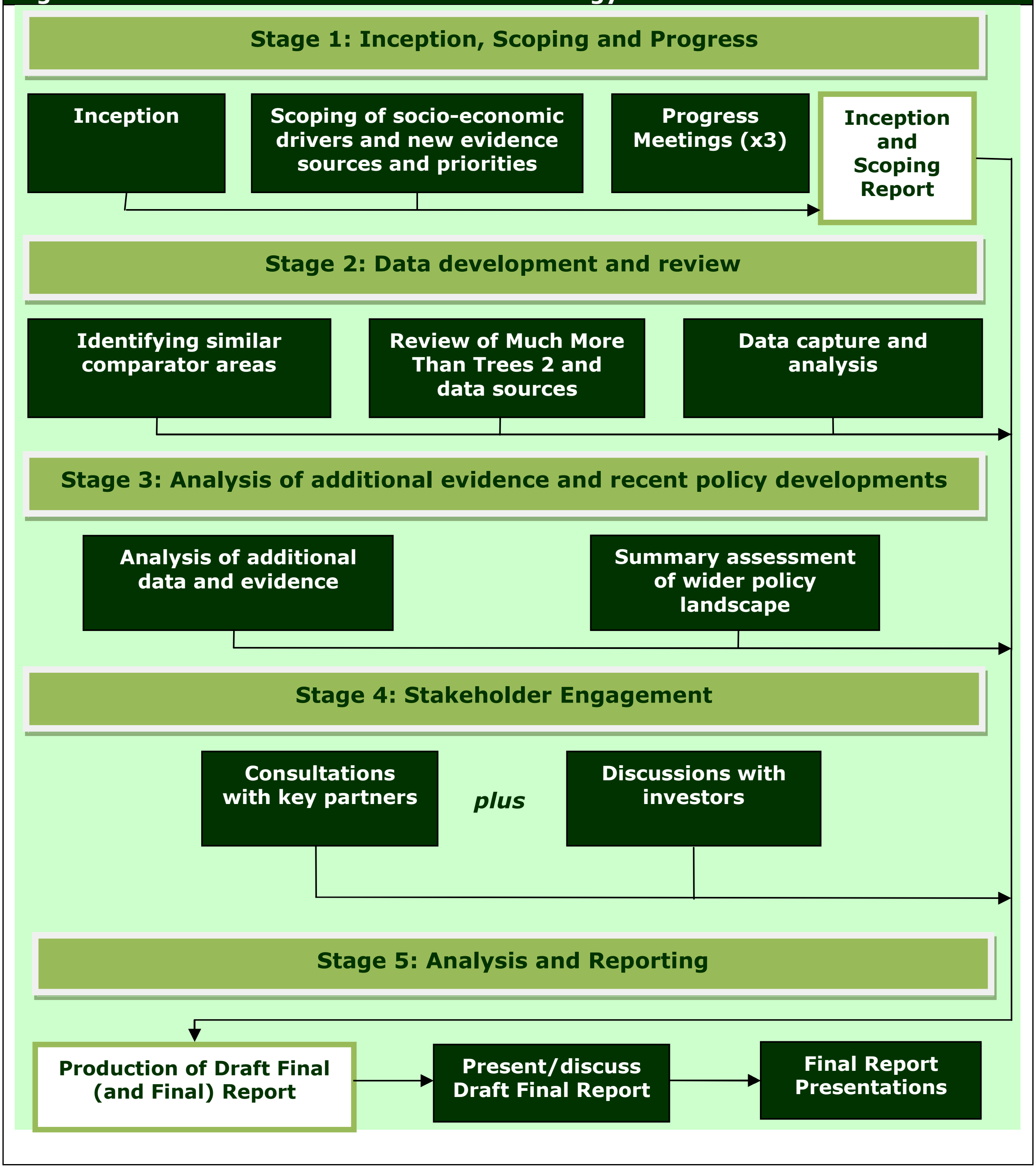
2.3 This process has resulted in a more precise definition of The National Forest for Much More Than Trees 3, with LSOAs being either included or excluded on a case by case basis, and this was done following consultation with research staff at Derbyshire, Leicestershire and Staffordshire County Councils. A full list of included LSOAs is set out in Annex 2, as is a map.

2.4 Where data is not available at LSOA level, district or county level data has been used. Appropriate weight has been considered in analysis of this data when it is appropriate to do so (for example relative weight is attached to North West Leicestershire where many LSOAs are inside The National Forest, compared to Lichfield, where many are outside).

2.5 In terms of **comparator areas** data has been collected and analysed to provide comparison, where appropriate, between The National Forest area, the East and West Midlands, and the national average. In addition, the Forest's performance is assessed against the performance of comparator areas elsewhere. This involved the selection of a '**condition**' comparator (i.e. an area with similar industrial, economic and population characteristics to The National Forest elsewhere in the country), and an '**aspirational**' comparator (i.e. an area that The National Forest could aspire to match, in terms of socio-economic development).

2.6 The district of **Newark and Sherwood** was chosen as the condition comparator, and **The New Forest** was chosen as the aspirational comparator following this process[1].

Figure 2.1: Much More Than Trees 3 Methodology



[1] The process by which these areas were selected and the rationale for selection is set out in Annex 3

Table 2.1: Much More Than Trees 3 Indicator Matrix

Sustainable Development Indicator (Theme)	Data measure (indicator)	Data source(s)	Geographic availability
Deprivation	Proportion of the population who live in wards / LSOAs that rank within the most deprived 10% and/or 25% wards in the country	Economic Deprivation Index (EDI)	Lower Super Output Area (LSOA)
Deprivation	Economic activity numbers and rates for working population	Office for National Statistics (APS)	Local Authority District (LAD)
Deprivation	Proportion of the unemployed people claiming benefit who have been out of work for more than one year (benefits: working age)	NOMIS	LSOA
Deprivation	Income support claimants as % of population (over 16)	NOMIS	LSOA
Deprivation	Life expectancy at birth	Floor Target Index (FTI)	LAD
Deprivation	Real (hidden) unemployment	NOMIS (ILO)	LAD
Deprivation	Extent of car ownership	Census	Ward
Deprivation	Economic Deprivation Index	Communities and Local Government (CLG)	LSOA
Deprivation	Economic Deprivation Index (EDI) Income Domain	CLG	LSOA
Deprivation	EDI Employment Domain	CLG	LSOA
Economic Growth	GDP/head and growth in GDP/head	ONS	LAD
Economic Growth	Total number of VAT registered businesses in the area per 10,000 population	ONS	LAD
Economic Growth	Business stock: formation rates and failure rates	ONS	LAD
Employment	Median gross weekly earnings workplace based (£) and Median gross annual earnings workplace based (£)	NOMIS (ASHE)	LAD
Employment	Median gross weekly earnings residence based (£) and Median gross annual earnings residence based (£)	NOMIS (ASHE)	LAD
Employment	Proportion of people of working age in employment	ONS (APS)	LAD
Employment	Jobs created and safeguarded in forestry, nurseries and contractors and landscaping	NFC	Forest area
Employment	Total number of local jobs by sector	ONS (APS)	LAD

Table 2.1: Much More Than Trees 3 Indicator Matrix			
Sustainable Development Indicator (Theme)	Data measure (indicator)	Data source(s)	Geographic availability
Employment	Percentage increase or decrease in the number of local jobs	NOMIS (ABI)	LAD
Employment	Numbers and percentages who are employees and self-employed, total, males and females	ONS (APS)	LAD
Employment	Proportion of the working age population who are unemployed	ONS (APS)	LAD
Employment	16 to 18 year olds who are not in education training or employment (NEET)	FTI	Upper Tier
Employment	Working age people on out of work benefits	NOMIS	LSOA
(External funding)	Investment and grant secured for the area	Various	
Wellbeing	Adult participation in sport and active recreation	FTI (Active People Survey)	LAD
Active Community	Young people's participation in positive activities	DCSF (TellUs Survey)	Upper Tier
(Demography)	Total number of people living in The National Forest area categorised by: gender; age bands; ethnicity	Mid Year Population Estimates	LSOA
(Demography)	Percentage change in total population by age bands	Mid Year Population Estimates	LSOA
(Housing)	Average property price	CLG/Land Registry	LAD
(Tourism)	Day visitors per annum	STEAM	Forest area
(Tourism)	Bed nights per annum	STEAM	Forest area
(Tourism)	Average spend per visitor	STEAM	Forest area
(Tourism)	Employment in tourism	STEAM	Forest area
Source: DC Research based on dialogue with the National Forest Company, 2010			

- ABI = Annual Business Inquiry
- APS = Annual Population Survey
- ASHE = Annual Survey of Hours and Earnings
- ILO = International Labour Office standard of unemployment

2.7 Table 2.1 above sets out the indicators that were selected for inclusion in the analysis for Much More Than Trees 3. It highlights the Sustainable Development heading, the measure itself, the source and the level of geographic availability. Evidence sources include a mix of national, regional and local datasets and bespoke statistical and survey information undertaken by the National Forest Company.

2.8 As in Much More Than Trees 2, it is important to note that the activity of the NFC is only one amongst a number of factors that can influence the economic environment and social climate within The National Forest. The majority of data contained in this report was drawn from secondary sources, and whilst Forest level analysis is possible with some indicators, it has been necessary to use lower (and occasionally upper) tier local authority analysis on occasion.

2.9 Much More Than Trees 3 provides a snapshot of The National Forest in terms of key indicators, and draws selected conclusions about some of the effects using available indicators. It is intended to complement the range of other monitoring and evaluation that the National Forest Company undertakes in order to assess the impact and effectiveness of its activities.

2.10 Finally, this report includes the views of key stakeholders and decision makers on the socio-economic performance of The National Forest over the past five years. This adds personal perspectives on how performance and impacts have been caused and attributed. It also highlights issues and actions to maintain and develop the socio-economic impact of The National Forest into the future.

3. THE SOCIO-ECONOMIC CONTEXT OF THE NATIONAL FOREST

This section looks at the wider socio-economic context of The National Forest, the changes that have occurred in the last five years, and the short to medium term future plans as set out in key reports and strategy documents. It also considers the changes to the wider policy environment emphasising where The National Forest contributes (or could potentially contribute) towards key regional, sub regional and local strategies and plans.

THE NATIONAL FOREST

3.1 The National Forest idea was conceived in the Government policy document 'Forestry in the Countryside' published by the Countryside Commission in 1987. The concept was to create a vast, new forest for the nation in lowland Britain that demonstrated the principles of multi-purpose forestry. This blends commercial forestry with a range of additional objectives and benefits including economic regeneration, landscape and ecological enhancement, rural diversification and community engagement, and creation of a new recreational and tourism resource.

3.2 The National Forest aims to link the ancient forests of Charnwood and Needwood, and includes the former Leicestershire and South Derbyshire coalfield, urban areas and extensive areas of farmland. It covers parts of two regions (East and West Midlands), three counties (Derbyshire, Leicestershire and Staffordshire) and six boroughs/districts (Charnwood, East Staffordshire, Hinckley and Bosworth, Lichfield, North West Leicestershire, and South Derbyshire).

3.3 The National Forest Company is responsible for creating the Forest in partnership with the public, private and voluntary sectors, and its local communities. It was established by Government in 1995, is a company limited by guarantee, and sponsored by the Department for Environment, Food and Rural Affairs (DEFRA).

3.4 **Much More Than Trees** is a periodic review designed to capture the social and economic impact of The National Forest. This current report is the third review, with the first review produced in 2001, and the second in 2004.

The key messages from the 2004[2] review are summarised as follows:

- *The National Forest profile is of 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.*

[2] Much More Than Trees 2, Staffordshire University for the National Forest Company, 2004

- *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.*

3.5 The National Forest Company also monitors the Forest against a set of **Sustainable Development Indicators**[3], which summarise progress against 20 social, economic and environmental indicators representing a balanced approach to the sustainable development of The National Forest. Originally produced in 2007, the indicators will be updated in 2010.

The National Forest Delivery Plan

3.6 The National Forest Delivery Plan, produced in 2009, is a key document in the context of Much More than Trees 3. It sets out how The National Forest will grow up to 2014 and beyond, and was developed following extensive consultation with residents and partners. This included Citizens Panel and Community Perceptions evidence set out in Section 4.

3.7 The National Forest's Delivery Plan sets out five key themes that are shaping how The National Forest continues to grow. This will ensure that, with partners, the National Forest Company will:

- **Keep creating The National Forest**: a lower but still ambitious Forest creation target of 200 to 250 hectares a year, with more linking up of existing woodlands.
- **Make the most of what we've created**: a focus on quality in all aspects of the Forest, its sites and its attractions, including management of existing woodlands.
- **Communities at the heart**: doing more to ensure that local communities know, love and are involved in their part of the Forest.
- **Telling the story**: communicating more to more people, about the big picture for The National Forest and about local sites.
- **A national showcase**: The National Forest is a test bed for developing new techniques and approaches from which others can learn.

3.8 The main socio-economic elements of the delivery plan are summarised below[4]:

- **Organisational arrangements and funding:** The Delivery Plan highlights the ongoing support for the current leadership provided by the National Forest Company, and DEFRA as its prime funder.
- **Access, Recreation and Sport:** The need to ensure a continuing high quality visitor experience, by maintaining public access, site signage and interpretation facilities; improving the quality and coherence of public access; and taking opportunities to develop new sport and recreation facilities will be key priorities.
- **Community Participation:** A continued approach to inclusive community involvement, which will include an increased emphasis on community development and the investigation of social enterprise opportunities.

[3] Set out in 'The National Forest, an Exemplar of Sustainable Development', The National Forest Company 2007

[4] For more detail on the delivery plan see www.nationalforest.org/document/reports/delivery_plan.pdf

- **Regeneration and Economy**: The local economy will benefit directly through developing leisure and tourism, the woodland economy, and rural diversification opportunities.
- **Agriculture:** Continued involvement of farmers and private landowners in diversification (to woodland, leisure, tourism and biodiversity uses) will remain central to The National Forest's creation.
- **Tourism:** The focus of tourism in The National Forest is to develop a sustainable visitor destination for the long-term, with visitor infrastructure development remaining a high priority.

Report of the EFRA Select Committee: Key Findings

3.9 The Environment, Food and Rural Affairs Committee is appointed by the House of Commons to examine the expenditure, administration, and policy of the Department for Environment, Food and Rural Affairs and its associated bodies.

3.10 In 2009, the Committee conducted an inquiry into how The National Forest had developed over the past 15 years. The Select Committee report was published[5] in March 2010, with key findings relevant to Much More Than Trees 3 including a specific focus on delivering economic benefits, development of wood fuel resources, and delivering social benefits:

Delivering Economic Benefits

- The Committee noted that a founding objective underpinning the Government's decision on where to locate The National Forest was that it should provide an opportunity to use forestry as a regeneration tool, hence the choice of an area containing many former mining communities. The Committee received a lot of evidence that the Forest was succeeding in meeting this objective. It was further noted that increases in house prices in the area indicated the positive impact of initiatives over the past decade, as were headline indicator performance taken from Much More Than Trees 2 and the Sustainable Development Indicators.
- Tourism impacts were also noted (with the industry being worth more than £270m per annum and employing 4,000 people), as were the number of jobs created or safeguarded through forestry, farm diversification and woodland businesses.

Development of Wood Fuel Resources

- The Committee found that there is a potential wood resource to supply up to thirty-two 100 kilowatt systems by 2012 and seventy five systems by 2032. The Company's focus was now on "making the wood fuel and wood products demand and supply develop together". The Committee recommended that the Company publishes, with DEFRA and other partners, a strategy for developing a sustainable market which balances supply and demand for wood fuel within The National Forest.

Delivering Social Benefits

- According to the National Forest Strategy, 10 million people live within an hour's travel of The National Forest, and a high priority for the National Forest Company is to create a "welcoming and accessible recreation resource" for

[5] House of Commons Environment, Food and Rural Affairs Committee: The National Forest Fourth Report of Session 2009–10 House of Commons London: The Stationery Office Limited

such people (including the 211,000 residents of the Forest). The Committee report referred to extensive evidence that this aim is being fulfilled, with 85% of The National Forest's sites being accessible to the public.

- The Committee urged the National Forest Company, in conjunction with its partners, to continue work to extend access to The National Forest to all segments of society, particularly to reflect the diverse make-up of its catchment area, and to work to balance the needs of all types of user.
- The Committee further recommended that improved transport provision, particularly to make facilities more readily accessible by public transport, should be a priority.

3.11 The Committee Report commented on the role of the National Forest Company, finding that it has proved to be a highly effective vehicle for leading the creation of The National Forest, delivering good value for public money. The report notes that the National Forest Company demonstrates how a small, non-bureaucratic body can bring significant impetus to a partnership of organisations working together to deliver national and local strategies.

The National Forest: An Exemplar of Sustainable Development

3.12 The National Forest Company's Sustainable Development reporting provides a 'triple bottom line' aligning monitoring of the Forest's development with broader local and national sustainable development reporting. The 2007 report sets out findings and actions across the environmental, economic and social indicators, with the latter two being highly relevant to Much More Than Trees 3 and summarised in Table 3.1.

Table 3.1: Economy and Social Sustainable Development Actions

The Economy	The Social
The National Forest Company will: ▪ Continue to invest directly and lever in other public funding and private sector sponsorship. ▪ Actively support partners in developing The National Forest as a sustainable leisure and tourism destination. ▪ Continue to build the woodland economy.	The National Forest Company will: ▪ Work with local partners and Government to improve measures of satisfaction, social justice and inclusion, healthy living and well-being. ▪ Continue to push for the widest possible participation in the social and educational benefits of the Forest. ▪ Contribute to strong community and civic leadership to complement environmental and economic developments.

Source: The National Forest: An Exemplar of Sustainable Development, 2007

3.13 The National Forest Company notes that in terms of the economy, the key challenges of reducing inequality in income and employment, and evidencing sustainable economic activity rests with partners. In terms of social action, the National Forest Company will continue to take action to build a collaborative approach to maintain the improvements made since 2000 in terms of deprivation and sustainable development activity.

The Woodland Economy

3.14 The National Forest Company has consistently invested in the development of forestry related economic activity. From 2005/6 to 2007/8 the Woodland Economy Business Programme (WEBS), followed by the National Forest Company

Grants programme in 2008/9, supported woodland and forestry business. It was delivered in the Leicestershire and Derbyshire areas of the Forest and aimed to develop new and existing forest related businesses by offering specialist advice to woodland businesses, capital grants for new developments, woodland skills training, signposting to other business support providers, as well as feasibility studies to local organisations considering installation of wood fuel boilers.

3.15 WEBS was independently evaluated in 2007[6], with the key findings being that the programme, *"not only impacted upon individual businesses but is also seen to have contributed positively towards wider social, economic and physical impacts many of which will only become evident in the longer term"*. WEBS contributed significantly to the development of The National Forest economy by providing a range of business support activities. The findings from this research suggested that most businesses seek support locally and would not tend to seek business support from mainstream providers without significant encouragement.

3.16 WEBS awarded grants of £166,000 to 39 projects. This supported the creation of 5 new businesses, helped to create or safeguard 24.5 jobs, provided training for 78 candidates and provided a total of 23 wood fuel feasibility studies. An evaluation survey of WEBS beneficiaries found that the majority envisaged that their business would grow over the following 12-24 months, with opportunities focusing around the growing public interest and awareness of The National Forest and alternatives to fossil fuels, the growing public desire to buy locally and the growth of the new woodland.

3.17 Current woodland economy related activity comprises of a programme of linked projects:

- **Woodland management:** A programme to support exemplary good practice in woodland management. This will support the growing woodfuel market, maximise nature conversation, embed sustainable approaches to woodland management, and provide advice to woodland owners.
- **Woodfuel installations and chip supply**: WEBS and subsequent National Forest Company grants have enabled forestry businesses to invest in log and woodchip processing equipment. Currently there are four woodfuel installations operating in The National Forest, with a total power output in the order of 300 kilowatts, with prospects for a further five to be operation in the next 12 to 18 months providing an additional 525 to 725 kilowatts.
- **Making Woods Work**: Jointly funded by emda and the National Forest Company and operating in the Leicestershire and Derbyshire areas of the Forest, Making Woods Work is focused on delivering the continued development of the woodland economy across The National Forest. It encourages improved collaboration across related sectors (including tourism, energy, craft, construction, recreation and leisure) and will increase engagement with emda and Business Link/East Midlands Businesses. It will seek to increase the take up of business support and advice and the funding available through the Rural Development Programme for England and business support/development grants.
- **The National Forest Wood Fair**: The Wood Fair and associated trade oriented events are designed to raise awareness of the role that woodlands and timber can play in sustainable development, rural diversification, renewable energy and landscape based tourism. The Wood Fair is a major

[6] WEBS: Research into Impacts and Future Needs, ERS for the WEBS Partnership, 2007.

public event held on an annual basis, with the most recent event (2009) involving 93 exhibitors and attended by 5,000 people.

3.18 In addition to this, the National Forest Company has contributed £150,000 to the Rosliston Workshops (as the next phase of sustainable, woodland-related regeneration at a major forest site), the total cost of which is around £600,000 (the other funders being Derbyshire Economic Partnership and South Derbyshire District Council).

Tourism and the Visitor Economy

3.19 Tourism in The National Forest has become a key economic driver, especially over the last five years. Section 4 of this report sets out tourism performance in terms of visitors, average spend and employment trends and Section 5 details perspectives as to the future impact potential.

3.20 The National Forest Company works in partnership with a range of local authority and destination management organisations, visitor attractions and accommodation providers to provide a focus for tourism development and marketing. As part of this process, a 20-year **Vision and Action Plan for Sustainable Tourism in The National Forest**[7] was produced in 2009.

3.21 The **Vision for Sustainable Tourism** along with supporting strategic objectives, is set out below:

The National Forest will be recognised and enjoyed as one of the top ten high quality sustainable destinations in the country. Its unique offer will be shaped around:

- A high quality, exciting and varied visitor experience in the setting of young and maturing woodlands, within an attractive, coherent landscape.
- Accessibility, inclusivity and value for money.
- Opportunities for enjoyable, exciting learning and recreation within a woodland setting all year round.
- A national exemplar of economic impact through environmental excellence.
- A maturing tourism market with a wide range of quality attractions for a wide range of visitors.
- Day trips for the surrounding populations and short breaks both playing a full part in the tourism offer and economy.
- Professional local businesses and a community that welcome tourism for the wide benefits it brings to the local economy, community and the environment.

3.22 The overall target for the period covered by the Vision is to deliver long-term and sustainable growth in the value of the visitor economy. This is set at around 3% average annual growth in visitor expenditure with concentrated efforts towards growing the proportion of staying visitors. This growth will be supported through an Action Plan organised around the following five strategic objectives:

- To improve the quality of the Forest tourism product to fit the changing needs of potential visitors seeking a wide range of high quality and value for money experiences.

[7] A Vision and Action Plan for Sustainable Tourism in Tne National Forest, The Tourism Company 2009

- To develop and sustain the unique environmental resource of the emerging Forest (the Forest's unique selling point) and supporting infrastructure for the benefit of visitors and residents.
- To improve tourism business performance in The National Forest, enabling future re-investment and new job opportunities.
- To focus marketing initiatives on key target opportunities through effective destination, thematic and tactical campaigns, improved co-ordination and packaging of suppliers.
- To ensure that all tourism stakeholders in and around The National Forest are working effectively together to realise the Vision, informed by good quality, up to date information.

3.23 In addition to the ongoing tourism performance data (summarised in Section 5), there have been some notable visitor research studies commissioned since Much More Than Trees 2 was produced in 2004. Evidence from these reports is highlighted in Section 4.

THE CHANGING POLICY LANDSCAPE

3.24 Since Much More Than Trees 2 was published in 2004 there have been notable changes in the socio-economic policy landscape. The **2007 Local Government and Public Involvement in Health Act** shifted local government performance management from a service to an outcome based framework based upon Local Area Agreements (LAAs).

3.25 The outcomes to be achieved through LAAs are often complex and multifaceted, requiring creative cross-cutting solutions from a range of partners working effectively together towards shared priorities. Another key change was that Non-Departmental Public Bodies (such as Regional Development Agencies (RDA), Big Lottery and Natural England) can choose to bring their funding together with LAA funding locally.

3.26 LAAs are, in effect, delivery plans for an area's Sustainable Community Strategy. They provide the basis for monitoring performance against The **New Performance Framework for Local Authorities and Local Authority Partnerships: Single Set of National Indicators**. The new performance framework means that local authorities are now no longer assessed on the quality of the services they provide, but on the outcomes that they, and their partners, deliver in the local area. Local areas chose 35 indicators which most closely relate to the priorities of the area, and set targets for them, against which performance is judged.

3.27 The National Forest will contribute towards the priorities of Derbyshire, Leicestershire and Staffordshire LAAs through its development and growth and it is important to evidence this contribution to **best position The National Forest as a key socio-economic partner**.

3.28 Table 3.2 summarises the National Indicators contained in the 2010 Local Area Agreements for Derbyshire, Leicestershire and Staffordshire, and provides a summary assessment of the potential contribution of The National Forest by DC Research to these priorities. It should be noted however, that with a change of Government, new performance approaches are likely.

Table 3.2: Contribution of The National Forest to 2010 LAA National Indicators

NI	Description	Leics	Staffs	Derbys	NF Contribution
1	% of people who believe people from different backgrounds get on well together in their local area	✓		✓	Low
2	% of people who feel that they belong to their neighbourhood	✓			Low
4	% of people who feel they can influence decisions about their locality	✓	✓		Low
6	Participation in regular volunteering	✓	✓		High
7	Environment for a thriving third sector		✓	✓	Medium
8	Adult participation in sport and active recreation	✓	✓	✓	High
54	Services for disabled children			✓	Low
56	Obesity among primary school age children in Year 6	✓	✓	✓	Low
57	Children and young people's participation in sporting opportunities	✓			Low
80	Achievement of Level 3 qualification by the age of 19		✓		Low
110	Young people's participation in positive activities	✓	✓	✓	High
117	16 to 18 year olds who are not in education, employment or training (NEET)	✓	✓	✓	Low
120	All age all cause mortality rate			✓	Low
121	Mortality rate from all circulatory and vascular diseases under 75s	✓	✓		Low
154	Net additional homes provided	✓	✓		Medium
155	Number of affordable homes delivered (gross)	✓	✓	✓	Low
163	Proportion of the working age population qualified to at least Level 2 or higher	✓	✓	✓	Low
165	Proportion of the working age population qualified to at least Level 4 or higher	✓	✓		Low
172	Percentage of small businesses showing employment growth in an area	✓	✓	✓	Medium
175	Access to services and facilities by public transport, walking and cycling		✓	✓	High
185	CO2 reduction from Local Authority operations	✓			Low
186	Per capita reduction in CO2 emissions in the LA area		✓	✓	Low
188	Planning to adapt to climate change	✓		✓	High
195	Improved street and environmental cleanliness – 195a (litter) & 195b (detritus)	✓		✓	Medium
197	Improved local biodiversity		✓		High

Source: DC Research analysis of Leicestershire, Staffordshire and Derbyshire LAAs. Note 'low' = some contribution

3.29 The **Sub National Review of Economic Development and Regeneration** (SNR) was launched in 2007, outlining an increased role for local authorities in the provision of economic development and related activities. RDAs lead the development of a new, single integrated regional strategy, working closely with local authorities and other partners, which will bring together Regional Economic Strategies and Regional Spatial Strategies (again, these structures may change with the change in Government).

3.30 In November 2008 the Government response to public consultation on the SNR was published, and enshrined in legislation as part of the **Local Democracy, Economic Development and Construction Act 2009**. This includes:

- The creation of a **local economic assessment duty** on upper tier and unitary local authorities.
- Mechanisms for local authorities to set-up formal collaborative arrangements on economic development (such as **Multi Area Agreements and Economic Prosperity Boards**).
- Production of the new **integrated regional strategy** (combining economic and spatial planning) to replace regional economic and spatial strategies.

3.31 Leicester and Leicestershire is currently the only sub region covering The National Forest with a Multi Area Agreement. The National Forest can contribute to the following Leicester and Leicestershire MAA Priorities:

- Increased number of businesses surviving beyond three years
- The area is regarded as the centre of excellence for food and drink
- High numbers of leisure and business tourists visit and spend in the sub region
- Everyone aspires to gaining a qualification at NVQ level 1
- A high proportion of the population is qualified to NVQ level 4
- Increased range of social enterprises and volunteering opportunities
- Low carbon and resource efficient physical development
- Improved access to green space for residents in and around Leicester
- Well designed and attractive City, market towns and urban and rural centres.

3.32 Until the new integrated strategies are produced, the regional economic strategies for the East and West Midlands provide a strategic economic development context for The National Forest.

4. NATIONAL FOREST SOCIO-ECONOMIC PERFORMANCE

4.1 Section 4 is the main analytical section of the report, and is focussed on the key themes (built around the Sustainable Development Indicator themes) for the socio-economic impact assessment. Each sub section reports on the key indicators, and provides:

- A time-series presentation for each of the key indicators, showing how these have changed over time – based on a detailed analysis of available key datasets.
- Where appropriate, a comparison of the performance of The National Forest with the selected comparator areas provides an assessment of how the area is performing against relevant other locations.
- The data tables particularly focus on changes since the publication of Much More Than Trees 2 in 2004.

DEMOGRAPHY AND POPULATION

National Forest Population

4.2 Table 4.1 shows that just over 211,000 people lived in The National Forest in 2008, an increase of 3.57% since 2004. The population was broadly split between males and females. In terms of age bands, the most significant increases are in the 16-29 age group (9.85%) and those of retirement age and above (9.10%).

Table 4.1: National Forest Population

	Mid 2004	Mid 2005	Mid 2006	Mid 2007	Mid 2008	Change (2004-8)	% change (2004-8)
All Ages	203,781	205,933	207,472	209,395	211,063	7,282	3.57%
Working Age	124,522	125,938	127,013	128,102	128,413	3,891	3.12%
Male	99,925	101,265	102,192	103,121	103,978	4,053	4.06%
Female	103,856	104,668	105,280	106,274	107,085	3,229	3.11%
0-15	41,411	41,525	41,428	41,349	41,357	-54	-0.13%
16-29	30,767	31,551	32,317	33,297	33,799	3,032	9.85%
30-44	46,753	46,714	46,381	45,945	45,295	-1,458	-3.12%
45-64 Males/45-59 Females	47,002	47,673	48,315	48,860	49,319	2,317	4.93%
65+ Males/60+ Females	37,848	38,470	39,031	39,944	41,293	3,445	9.10%

Source: DC Research calculations based on Mid-Year Population Estimates for Lower Layer Super Output Areas in England and Wales by Broad Age Group and Sex, Office for National Statistics © Crown Copyright 2009

4.3 Table 4.2 compares the change in The National Forest population with the comparator areas, and with regional and national averages. The population increase in The National Forest is slightly higher than the East Midlands average, and higher than England and the other comparators, thus supporting perceptions from stakeholders that the area is increasingly becoming a more attractive place to live and work.

Table 4.2: National Forest Population (Comparisons)

	Mid 2004	Mid 2005	Mid 2006	Mid 2007	Mid 2008	Change (2004-8)	% change (2004-8)
National Forest	203,781	205,933	207,472	209,395	211,063	7,282	3.57%
East Midlands	4,291,400	4,327,500	4,364,200	4,399,600	4,433,000	141,600	3.30%
West Midlands	5,326,700	5,350,700	5,366,700	5,381,800	5,411,100	84,400	1.58%
Newark and Sherwood	110,200	111,000	111,700	112,600	113,300	3,100	2.81%
New Forest	172,200	173,000	173,700	174,700	175,400	3,200	1.86%
England	50,110,700	50,465,600	50,762,900	51,092,000	51,446,200	1,335,500	2.67%

Source: DC Research calculations based on Mid-Year Population Estimates for Lower Layer Super Output Areas in England and Wales by Broad Age Group and Sex, Office for National Statistics © Crown Copyright 2009

Working Age Population

4.4 Tables 4.3 and 4.4 overleaf show comparisons of working age population and of population by gender. Working age population in The National Forest rose by just under 4,000 people from 2004 to 2008, comprising 60.8% of the total population in 2008 compared to 61.1% in 2004. This is in line with regional averages, and is a higher proportion than both Newark and Sherwood and the New Forest.

4.5 Population by gender is broadly comparable over the period 2004 to 2008, and is in line with comparator areas.

Table 4.3: Working Age Populations (Comparisons)

	Mid 2004		Mid 2005		Mid 2006		Mid 2007		Mid 2008		Change (2004-8)
	Number	% of total	Number	% of total	Number	% of total	Number	% of total	Number	% of total	
National Forest	124,522	61.1%	125,938	61.2%	127,013	61.2%	128,102	61.2%	128,413	60.8%	3,891
East Midlands	2,653,300	61.8%	2,681,900	62.0%	2,711,100	62.1%	2,730,400	62.1%	2,742,700	61.9%	89,400
West Midlands	3,249,500	61.0%	3,268,300	61.1%	3,281,800	61.2%	3,285,000	61.0%	3,293,800	60.9%	44,300
Newark and Sherwood	66,100	60.0%	66,600	60.0%	67,100	60.1%	67,400	59.9%	67,600	59.7%	1,500
New Forest	96,500	56.0%	97,000	56.1%	97,100	55.9%	97,100	55.6%	96,900	55.2%	400
England	31,083,100	62.0%	31,383,500	62.2%	31,626,700	62.3%	31,791,700	62.2%	31,937,600	62.1%	854,500

Source: DC Research calculations based on Mid-Year Population Estimates for Lower Layer Super Output Areas in England and Wales by Broad Age Group and Sex, Office for National Statistics © Crown Copyright 2009

Table 4.4: Population by Gender (Comparisons)

		Mid 2004		Mid 2005		Mid 2006		Mid 2007		Mid 2008		Change (2004-8)
		Number	**% of total**	**Number**	**% of total**	**Number**	**% of total**	**Number**	**% of total**	**Number**	**% of total**	**Number**
National Forest	Male	99,925	49.0%	101,265	49.2%	102,192	49.3%	103,121	49.2%	103,978	49.3%	4,053
	Female	103,856	51.0%	104,668	50.8%	105,280	50.7%	106,274	50.8%	107,085	50.7%	3,229
East Midlands	Male	2,114,000	49.3%	2,135,700	49.4%	2,157,300	49.4%	2,172,900	49.4%	2,194,200	49.5%	80,200
	Female	2,177,400	50.7%	2,191,900	50.7%	2,206,900	50.6%	2,226,800	50.6%	2,238,800	50.5%	61,400
West Midlands	Male	2,615,400	49.1%	2,630,600	49.2%	2,639,500	49.2%	2,648,100	49.2%	2,664,100	49.2%	48,700
	Female	2,711,300	50.9%	2,720,100	50.8%	2,727,200	50.8%	2,733,800	50.8%	2,747,000	50.8%	35,700
Newark and Sherwood	Male	53,800	48.8%	54,200	48.8%	54,700	49.0%	55,100	48.9%	55,500	49.0%	1,700
	Female	56,400	51.2%	56,800	51.2%	57,100	51.1%	57,500	51.1%	57,800	51.0%	1,400
New Forest	Male	82,700	48.0%	83,000	48.0%	83,400	48.0%	84,000	48.1%	84,400	48.1%	1,700
	Female	89,500	52.0%	90,000	52.0%	90,300	52.0%	90,700	51.9%	90,900	51.8%	1,400
England	Male	24,563,000	49.0%	24,757,800	49.1%	24,926,400	49.1%	25,114,500	49.2%	25,318,800	49.2%	755,800
	Female	25,547,700	51.0%	25,707,800	50.9%	25,836,600	50.9%	25,977,500	50.8%	26,127,500	50.8%	579,800

Source: DC Research calculations based on Mid-Year Population Estimates for Lower Layer Super Output Areas in England and Wales by Broad Age Group and Sex, Office for National Statistics © Crown Copyright 2009

House Prices

4.6 Table 4.5 shows average house prices in each of The National Forest districts and comparator areas.

Table 4.5: Average House Prices, 2010

	Detached	Semi-Detached	Terraced	Flat/ Maisonette	Overall Average
Charnwood	£265,576	£157,147	£136,078	£117,910	£172,341
East Staffordshire	£261,067	£145,968	£110,364	£108,948	£162,168
Hinckley and Bosworth	£275,391	£159,291	£127,424	£111,010	£180,147
Lichfield	£346,531	£185,215	£183,036	£168,191	£238,796
North West Leicestershire	£255,143	£144,480	£117,779	£129,948	£182,043
South Derbyshire	£239,600	£141,724	£127,046	£157,166	£174,748
Newark and Sherwood	£239,488	£138,702	£115,120	£101,829	£176,393
New Forest	£386,502	£235,547	£211,989	£163,267	£285,873
East Midlands	£197,622	£107,006	£82,933	£89,493	£126,106
West Midlands	£239,389	£124,503	£93,816	£96,083	£135,614
England & Wales	£258,928	£155,738	£125,074	£153,314	£164,288

Source: Land Registry March 2010, Crown Copyright Reserved

4.7 With the exception of Lichfield (which only comprises a small corner of The National Forest), overall average house prices for March 2010 range from £162,000 in East Staffordshire to £182,000 in North West Leicestershire. This is comparable to Newark and Sherwood and the national average, and is significantly higher than the regional averages. However, the average price range for The National Forest is significantly lower than that of The New Forest, where higher house prices are sustained by a vibrant visitor economy and the prevalence of second home ownership.

DEPRIVATION

4.8 The Indices of Deprivation 2004 and 2007 were created to provide the best possible measure of multiple deprivation at a single point in time. The Indices therefore do not facilitate backwards comparison nor do they enable understanding as to how the pattern of deprivation is changing between these fixed points. In order to address and in part overcome these problems, an Economic Deprivation Index (EDI) has been constructed in a consistent manner at Lower Super Output Area level for each year between 1999 and 2005.

Multiple deprivation

4.9 Table 4.6 highlights the LSOAs in The National Forest that are in the top 10% (bold) and 25% LSOAs in England in terms of economic deprivation by rank. From a total Forest population of 211,063, 12.7% (26,898) live in LSOAs in the top 25% most deprived LSOAs, and 2.9% (6,146) of the population live in the top 10% most deprived.

4.10 There are particular deprivation issues in parts of urban East Staffordshire, North West Leicestershire and South Derbyshire, notably:

- **East Staffordshire**: Eton Park and Stapenhill, both with LSOAs in the 10% and 25% most deprived, as well as Anglesey, Shobnall, Horninglow, and Winshill.

- **North West Leicestershire**: Greenhill (with Greenhill North East in the 10% most deprived and Greenhill Centre in the 25% most deprived), and Measham (Measham Centre in the top 25% most deprived).
- **South Derbyshire**: Newhall & Stanton (with Newhall Plummer Road in the 10% most deprived), Hartshorne & Tickhall (with Goseley in the 25% most deprived), and Midway (Midway - Elmsleigh in the top 25% most deprived).

4.11 It is clear that many of these LSOAs have been amongst the most deprived in the Forest since 1999, highlighting pockets of structural economic hardship. Nevertheless a number of these LSOAs have improved their ranking from 1999 to 2005.

Table 4.6: Economic Deprivation Index 2009 (The National Forest LSOAs in the top 10% (BOLD) and top 25% most deprived)

LSOA code	LSOA name	LSOA EDI Rank (1=the most deprived)							
		1999	2000	2001	2002	2003	2004	2005	2008 pop est (all age)
E01025934	**NW Leicestershire 009C**	**2054**	**1646**	**1278**	**2121**	**1374**	**1364**	**1999**	**1,531**
E01029450	**East Staffordshire 014B**	**2978**	**2539**	**2672**	**2921**	**3105**	**3475**	**2628**	**1,526**
E01029427	**East Staffordshire 008B**	**4118**	**3326**	**3920**	**2896**	**2531**	**3249**	**2855**	**1,507**
E01019863	**South Derbyshire 008D**	**2529**	**3579**	**2840**	**3494**	**2783**	**2494**	**3043**	**1,582**
E01025932	NW Leicestershire 009A	3624	3746	3070	2722	3122	3252	3653	1,485
E01029437	East Staffordshire 007D	5381	4009	3912	3446	3591	4012	3671	1,722
E01019842	South Derbyshire 010D	3840	4232	3877	2847	3653	2983	3723	1,718
E01029468	East Staffordshire 010A	2740	1940	2101	2168	2395	3872	3984	1,603
E01029445	East Staffordshire 009A	3191	2830	2695	2138	3590	3498	4033	1,581
E01029453	East Staffordshire 014E	2913	3389	3495	3981	4532	5357	4134	1,507
E01019856	South Derbyshire 007B	6795	6097	6405	5330	5729	7121	5056	1,534
E01025949	NW Leicestershire 012D	7822	7621	8298	8022	7730	7522	6460	1,696
E01019858	South Derbyshire 007D	5511	5273	6671	6205	5528	5233	6643	1,631
E01029426	East Staffordshire 008A	6150	6945	5890	5514	7427	6856	6849	1,490
E01029472	East Staffordshire 010E	6712	6771	7327	6751	7000	7691	6853	1,598
E01029447	East Staffordshire 009C	7256	4955	5115	6669	5769	6721	7303	1,611
E01029409	East Staffordshire 011C	7788	6747	6486	7014	7636	7348	7534	1,576

Source: The Economic Deprivation Index 2009, analysed by DC Research.

Income and employment deprivation

4.12 Tables detailing income and employment deprivation are set out in the Annexes (Tables A4.1 and A4.2). These tables highlight that deprivation remains a priority issue in parts of the urban areas of Burton upon Trent, Swadlincote and Coalville.

Car ownership

4.13 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 4.7, reproduced from Much More Than Trees 2, 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. It will be interesting to see how performance has changed in regard to this indicator following the 2011 Census.

Table 4.7: Extent of Car Ownership in The National Forest (2001)							
	House holds	No car or van		1 car or van		2+ cars or vans	
		No.	%	No.	%	No.	%
National Forest	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: 2001 Census / Much More Than Trees 2 CESR and NFC 2004

ECONOMIC GROWTH

Productivity

4.14 Productivity is commonly measured as Gross Value Added (GVA) per head (which is Gross Domestic Product less taxes (subsidies) on products and services. The lowest level of geographic disaggregation is NUTS 3 (Nomenclature of Units for Territorial Statistics), which in terms of The National Forest amounts to data for South & West Derbyshire, Leicestershire and Rutland and Staffordshire. Clearly whilst this covers The National Forest, there are a range of economic centres of population included in the data that are likely to have impacts on GVA.

4.15 Table 4.8 compares NUTS 3 GVA per head performance against regional, England and UK averages. The performance in Leicestershire & Rutland and Staffordshire is significantly higher than regional averages.

Table 4.8: Headline Gross Value Added (GVA) per head by NUTS 3 area at current basic prices by region (£ per head)				
	2000	2007	Change (00-07)	% change (00-07)
South and West Derbyshire	11 421	15 386	3 965	34.7%
Leicestershire CC and Rutland	12 273	18 072	5 799	47.3%
Staffordshire CC	10 669	14 848	4 179	39.2%
East Midlands	12 828	17 614	4 786	37.3%
West Midlands	12 944	17 044	4 100	31.7%
England	14 686	20 458	5 772	39.3%
United Kingdom	14 677	20 430	5 753	39.2%

Source: Regional Gross Value Added, ONS
1 The headline GVA series for this publication have been calculated using a five-period moving average in order to remove some year-to-year volatility in the unadjusted series
2 Estimates of workplace based GVA allocate income to the region in which commuters work.
3 The GVA for Extra-Regio (defined as off-shore GVA that cannot be assigned to any region) comprises compensation of employees and gross operating surplus which cannot be assigned to regions.

VAT registered businesses

4.16 Table 4.9 sets out the number of VAT registered businesses for the six districts in The National Forest. From 2004 to 2007 there has been growth in each district except East Staffordshire, with North West Leicestershire showing growth of 19.4% (equating to 41 per 10,000 of population). In broad terms, growth in VAT registrations in The National Forest districts compares favourably with regional and England averages.

Table 4.9: Number of VAT Registrations							
	2004	2005	2006	2007	Change (2004-2007)	% change	2007 per 10000 population
South Derbyshire	275	275	285	295	20	7.3%	32.3
Charnwood	435	440	410	465	30	6.9%	28.2
Hinckley and Bosworth	330	365	330	370	40	12.1%	35.4
North West Leicestershire	310	300	330	370	60	19.4%	40.9
East Staffordshire	350	330	325	340	-10	-2.9%	31.4
Lichfield	345	340	370	350	5	1.4%	35.9
Newark and Sherwood	345	330	350	375	30	8.7%	33.3
New Forest	570	555	555	575	5	0.9%	32.9
East Midlands	12,435	12,305	12,375	13,260	825	6.6%	30.1
West Midlands	15,090	14,815	14,785	15,720	630	4.2%	29.2
England	160,695	159,555	159,335	179,905	19,210	12.0%	35.2

Source: ONS, Crown Copyright Reserved, accessed via NOMIS April 2010.
Note: Numbers are rounded to the nearest five in order to avoid disclosure. Consequently, totals may not exactly match the sum of their parts.

4.17 Table 4.10 sets out the number of VAT business de-registrations for the six districts in The National Forest. From 2004 to 2007 there has been a decline (i.e. a reduction in the number of de-registrations) in each district (notably East Staffordshire and Lichfield) except South Derbyshire. This overall decline is far higher in The National Forest districts than both regional and national patterns.

Table 4.10: Number of VAT De-registrations						
	2004	2005	2006	2007	Change (2004-2007)	% change
South Derbyshire	170	185	180	180	10	5.9%
Charnwood	375	375	360	350	-25	-6.7%
Hinckley and Bosworth	285	240	230	260	-25	-8.8%
North West Leicestershire	225	205	215	210	-15	-6.7%
East Staffordshire	285	240	270	220	-65	-22.8%
Lichfield	280	255	265	245	-35	-12.5%
Newark and Sherwood	270	250	240	265	-5	-1.9%
New Forest	455	435	430	455	0	0.0%
East Midlands	9,930	9,475	9,475	9,535	-395	-4.0%
West Midlands	12,345	11,620	12,160	12,050	-295	-2.4%
England	131,335	124,945	126,185	128,800	-2,535	-1.9%

Source: ONS, Crown Copyright Reserved, accessed via NOMIS April 2010.
Note: Numbers are rounded to the nearest five in order to avoid disclosure. Consequently, totals may not exactly match the sum of their parts.

4.18 Table 4.11 shows the total stock of VAT registered businesses from 2004 to 2007. This suggests that the stock of businesses has risen across The National Forest districts, with a percentage change that, with the exception of Charnwood, outperforms the comparator areas, and the regional and England averages. Performance is particularly strong in South Derbyshire and North West Leicestershire.

Table 4.11: Stock of VAT Registered Businesses at end of year						
	2004	2005	2006	2007	Change (2004-2007)	% change
South Derbyshire	2,645	2,735	2,840	2,955	310	11.7%
Charnwood	4,775	4,840	4,890	5,010	235	4.9%
Hinckley and Bosworth	3,530	3,655	3,755	3,865	335	9.5%
North West Leicestershire	3,210	3,305	3,420	3,575	365	11.4%
East Staffordshire	3,570	3,660	3,715	3,835	265	7.4%
Lichfield	3,705	3,790	3,895	4,000	295	8.0%
Newark and Sherwood	3,745	3,825	3,935	4,045	300	8.0%
New Forest	6,505	6,620	6,745	6,865	360	5.5%
East Midlands	129,685	132,515	135,420	139,145	9,460	7.3%
West Midlands	157,585	160,780	163,405	167,075	9,490	6.0%
England	1,616,825	1,651,435	1,684,590	1,735,690	118,865	7.4%

Source: ONS, Crown Copyright Reserved, accessed via NOMIS April 2010.
Note: Numbers are rounded to the nearest five in order to avoid disclosure. Consequently, totals may not exactly match the sum of their parts.

EMPLOYMENT AND EARNINGS

4.19 It is useful to compare workplace and resident-based earnings for The National Forest area, as it highlights differences in wages for jobs (jobs based in the Forest districts) compared to jobs held by Forest residents (who live in the Forest districts but might work outside).

Weekly and annual pay

4.20 Table 4.12 shows the median weekly pay for The National Forest districts by workplace. Weekly earnings are highest in Charnwood, although it is likely that a high proportion of workplace earnings are outside The National Forest boundary (for example around the suburbs of Leicester and in Loughborough). South Derbyshire had the highest earnings in 2004 of all The National Forest districts, but earnings have grown by only 1.7% on the period up to 2009, now placing the district behind all bar East Staffordshire.

Table 4.12: Median Weekly Pay (Gross) - Full Time Workers (Workplace Analysis)								
	2004 (£)	2005 (£)	2006 (£)	2007 (£)	2008 (£)	2009 (£)	change (04-09)	% change (2004-9)
South Derbyshire	424.2	445.2	465.1	471.7	495.3	431.5	7.3	1.7%
Charnwood	408.5	434.6	449.3	461.7	498.2	500.6	92.1	22.5%
Hinckley and Bosworth	378.8	398.9	420.8	432.9	465.0	453.4	74.6	19.7%
North West Leicestershire	389.6	375.8	435.1	401.9	478.7	438.3	48.7	12.5%
East Staffordshire	404.5	387.7	403.4	416.6	449.5	417.8	13.3	3.3%
Lichfield	406.3	393.6	420.7	394.0	469.9	474.4	68.1	16.8%
Newark and Sherwood	326.2	378.0	385.8	398.8	417.9	426.1	99.9	30.6%
New Forest	374.4	405.6	401.3	428.4	440.0	459.4	85.0	22.7%
East Midlands	383.6	405.2	419.1	421.6	445.1	456.6	73.0	19.0%
West Midlands	392.0	402.4	412.5	430.1	448.9	456.4	64.4	16.4%
England	425.0	436.0	449.8	463.6	483.9	495.2	70.2	16.5%

Source: ASHE, accessed via Nomis April 2010.
Note: In 2006 there were a number of methodological changes made. For further details go to http://www.nomisweb.co.uk/articles/341.aspx.

4.21 Table 4.13 shows the median annual pay for The National Forest districts by workplace. Growth in annual earnings across the six districts are broadly in line with the comparator areas, and with regional and England averages, with

Charnwood again having the highest median annual pay, and East Staffordshire the lowest.

Table 4.13: Median Annual Pay (Gross) - Full Time Workers (Workplace Analysis)

	2004 (£)	2005 (£)	2006 (£)	2007 (£)	2008 (£)	2009 (£)	Change (04-09)	% change (2004-9)
South Derbyshire	21,249	23,164	24,425	26,423	26,649	24,725	3,476	16.4%
Charnwood	21,958	22,857	23,953	24,006	25,337	26,278	4,320	19.7%
Hinckley and Bosworth	20,181	21,609	21,661	22,753	24,057	23,034	2,853	14.1%
North West Leicestershire	20,773	19,915	21,672	21,791	#	24,174	3,401	16.4%
East Staffordshire	21,814	20,801	21,211	21,681	23,236	22,631	817	3.7%
Lichfield	21,446	21,770	22,048	19,713	23,067	24,571	3,125	14.6%
Newark and Sherwood	18,535	18,316	20,830	#	21,919	21,532	2,997	16.2%
New Forest	20,297	19,893	21,607	22,450	22,842	23,713	3,416	16.8%
East Midlands	20,691	21,494	21,946	22,222	23,271	24,319	3,628	17.5%
West Midlands	20,765	21,447	22,000	22,543	23,849	23,961	3,196	15.4%
England	22,418	23,280	23,729	24,480	25,549	26,138	3,720	16.6%

Source: ASHE, accessed via Nomis April 2010.
These figures are suppressed as statistically unreliable.
Note: In 2006 there were a number of methodological changes made.
For further details go to : http://www.nomisweb.co.uk/articles/341.aspx

4.22 Tables 4.14 and 4.15 set out weekly and annual earnings for the six The National Forest districts by residence. Residence based earnings are slightly higher than the workplace earnings for both weekly and annual pay, but exhibiting the same broad patterns.

Table 4.14: Median Weekly Pay (Gross) - Full Time Workers (Resident Analysis)

	2004 (£)	2005 (£)	2006 (£)	2007 (£)	2008 (£)	2009 (£)	change (04-09)	% change (2004-9)
South Derbyshire	411.4	419.7	422.9	442.8	497.0	474.6	63.2	15.4%
Charnwood	392.3	415.4	461.6	451.8	473.1	505.9	113.6	29.0%
Hinckley and Bosworth	440.9	456.8	452.4	440.6	464.3	452.8	11.9	2.7%
North West Leicestershire	405.4	419.2	447.4	422.3	507.1	464.9	59.5	14.7%
East Staffordshire	401.4	408.0	415.7	412.6	449.5	431.7	30.3	7.5%
Lichfield	456.8	459.5	482.1	461.2	505.3	551.7	94.9	20.8%
Newark and Sherwood	388.1	418.2	406.0	409.9	435.6	449.7	61.6	15.9%
New Forest	415.3	433.8	439.5	459.7	451.4	487.9	72.6	17.5%
East Midlands	391.6	412.2	423.1	430.0	450.2	460.5	68.9	17.6%
West Midlands	392.9	404.7	416.2	431.1	449.8	457.4	64.5	16.4%
England	425.9	437.3	450.4	464.0	484.5	496.0	70.1	16.5%

Source: ASHE, accessed via Nomis April 2010.
Note: In 2006 there were a number of methodological changes made. For further details go to http://www.nomisweb.co.uk/articles/341.aspx.

Table 4.15: Median Annual Pay (Gross) - Full Time Workers (Resident Analysis)								
	2004 (£)	2005 (£)	2006 (£)	2007 (£)	2008 (£)	2009 (£)	change (04-09)	% change (2004-9)
South Derbyshire	23,566	23,003	23,046	#	25,945	24,318	752	3.2%
Charnwood	20,952	22,696	24,093	23,507	25,094	25,598	4,646	22.2%
Hinckley and Bosworth	22,192	23,466	24,167	22,994	24,270	26,248	4,056	18.3%
North West Leicestershire	21,274	22,069	22,501	23,422	25,753	25,944	4,670	22.0%
East Staffordshire	21,726	21,564	21,729	21,584	23,041	23,083	1,357	6.2%
Lichfield	23,481	24,386	24,726	23,726	25,577	28,016	4,535	19.3%
Newark and Sherwood	19,403	21,024	22,903	21,099	21,768	#	N/A	N/A
New Forest	23,113	22,046	23,013	23,928	24,866	25,934	2,821	12.2%
East Midlands	20,935	21,950	22,187	22,544	23,724	24,533	3,598	17.2%
West Midlands	20,795	21,570	22,110	22,559	23,820	23,948	3,153	15.2%
England	22,438	23,313	23,757	24,500	25,558	26,148	3,710	16.5%

Source: ASHE, accessed via Nomis April 2010. # These figures are suppressed as statistically unreliable.
Note: In 2006 there were a number of methodological changes made.
For further details go to : http://www.nomisweb.co.uk/articles/341.aspx

Economic activity rate

4.23 Table 4.16 sets out the economic activity rate for the six National Forest districts. The economic activity rate is the number of people in employment or unemployed as a percentage of the total working age population. There has been a fall in economic activity rates for all bar North West Leicestershire (which has both a high rate, and shows an increase of 4.2 percentage points from 2005/6 to 2008/9). Despite this overall fall, the six districts still out-perform the comparator areas and the regional and England averages.

4.24 Whilst the performance of North West Leicestershire is notable, and that much activity is centred around Coalville, it should be noted that significant activity is clustered around Castle Donington and East Midlands Airport, which is outside The National Forest.

Table 4.16: Economic Activity Rate					
	Jul 2005-Jun 2006	Jul 2006-Jun 2007	Jul 2007-Jun 2008	Jul 2008-Jun 2009	change (2005-6 to 2008-9)
South Derbyshire	89.5	80.2	83.7	83.7	-5.8
Charnwood	84.2	83.5	85.1	82.2	-2.0
Hinckley and Bosworth	85.2	82.2	81.0	82.8	-2.4
North West Leicestershire	83.2	84.6	78.8	87.4	4.2
East Staffordshire	81.7	81.0	84.3	81.2	-0.5
Lichfield	80.1	87.3	83.1	89.4	9.3
Newark and Sherwood	82.0	82.8	81.5	78.9	-3.1
New Forest	81.1	80.3	81.6	80.0	-1.1
East Midlands	80.3	80.2	80.3	80.9	0.6
West Midlands	76.9	77.2	77.4	77.3	0.4
England	78.5	78.7	78.8	79.0	0.5

Source: ONS Annual Population Survey accessed via NOMIS, April 2010

Employment rates

4.25 The employment rate for all six districts in The National Forest, set out in Table 4.17, shows a fall in each of the districts except North West Leicestershire (and again a good proportion of employment will occur at Castle Donington and East

Midlands Airport) and Lichfield (most of which is outside The National Forest boundary). Again, this performance is broadly comparable to regional and national averages, suggesting such falls are linked to macro economic trends rather than The National Forest specific issues.

Table 4.17: Employment Rate

	Jul 2005-Jun 2006	Jul 2006-Jun 2007	Jul 2007-Jun 2008	Jul 2008-Jun 2009	change (2005-6 to 2008-9)
South Derbyshire	82.7	76.3	81.2	77.8	-4.9
Charnwood	81.1	78.7	80.9	78.1	-3.0
Hinckley and Bosworth	81.7	79.2	78.6	78.1	-3.6
North West Leicestershire	81.0	80.3	73.5	81.7	0.7
East Staffordshire	78.6	76.2	81.0	76.7	-1.9
Lichfield	76.8	85.4	79.7	84.9	8.1
Newark and Sherwood	80.2	77.9	74.1	76.6	-3.6
New Forest	78.1	75.6	79.4	74.6	-3.5
East Midlands	76.2	76.2	75.9	75.2	-1.0
West Midlands	72.7	72.7	72.4	70.5	-2.2
England	74.3	74.4	74.5	73.4	-0.9

Source: ONS Annual Population Survey accessed via NOMIS, April 2010

4.26 Tables 4.18 and 4.19 set out the percentage of the population that are of working age who employees, and also the percentage who are self employed.

4.27 The National Forest districts outperformed regional and national averages in terms of the percentage who are employees, although there were falls in South Derbyshire, Charnwood and Lichfield from 2005/6 to 2008/9. Again, North West Leicestershire performed particularly well over this time period, with all districts having a percentage above regional and national averages.

Table 4.18: % of working age who are employees

	Jul 2005-Jun 2006	Jul 2006-Jun 2007	Jul 2007-Jun 2008	Jul 2008-Jun 2009	change (2005-6 to 2008-9)
South Derbyshire	75.5	64.1	72.1	71.4	-4.1
Charnwood	72.1	69.6	70.1	68.9	-3.2
Hinckley and Bosworth	68.9	70.0	69.9	70.5	1.6
North West Leicestershire	67.9	69.7	67.9	71.9	4.0
East Staffordshire	66.0	66.8	68.1	67.9	1.9
Lichfield	68.1	68.9	67.7	64.4	-3.7
Newark and Sherwood	60.4	61.6	63.3	69.5	9.1
New Forest	68.2	61.7	67.3	65.7	-2.5
East Midlands	66.6	66.7	66.6	66.9	0.3
West Midlands	64.1	63.8	63.6	62.2	-1.9
England	64.5	64.4	64.5	63.7	-0.8

Source: ONS Annual Population Survey accessed via NOMIS, April 2010

4.28 The percentage of working age population who were self employed dropped in a number of districts (with the exception of Lichfield, which has a very high level of self employment – double that of regional and England averages – although most of the district is outside The National Forest). It is interesting to note that Newark and Sherwood has dropped from 19.8% to 6.4% over the period 2005 to 2009.

Table 4.19: % of working age who are self employed					
	Jul 2005-Jun 2006	Jul 2006-Jun 2007	Jul 2007-Jun 2008	Jul 2008-Jun 2009	change (2005-6 to 2008-9)
South Derbyshire	6.0	11.5	8.5	6.3	0.3
Charnwood	9.0	8.8	10.7	8.9	-0.1
Hinckley and Bosworth	12.9	9.2	8.7	7.7	-5.2
North West Leicestershire	12.1	9.6	5.6	8.6	-3.5
East Staffordshire	11.0	9.3	11.9	8.8	-2.2
Lichfield	8.7	15.7	12.0	18.9	10.2
Newark and Sherwood	19.8	14.8	8.6	6.4	-13.4
New Forest	9.9	13.1	12.1	8.6	-1.3
East Midlands	9.3	9.1	8.8	7.9	-1.4
West Midlands	8.2	8.3	8.4	8.0	-0.2
England	9.4	9.5	9.6	9.3	-0.1
Source: ONS Annual Population Survey accessed via NOMIS, April 2010					

4.29 Annex 4 provides more detailed information on the male/female splits for economic activity and employment rates, and percentages of working age population who are employees and self employed across each of the six districts (Tables A4.3 to A4.6).

Occupational profile

4.30 In common with national trends, the districts are well represented in terms of managers and senior officials, skilled trades occupations and process, plant and machine operatives. Interestingly, North West Leicestershire and East Staffordshire are well represented in terms of elementary occupations (such as farm workers, labourers, kitchen assistants and bar staff etc.), and Hinckley and Bosworth and North West Leicestershire are also well represented in terms of personal service occupations (which are likely to include a range of tourism related roles). Table A4.7 in the Annexes shows the occupational profile of the six National Forest districts for 2008/9 as a percentage of the number of working age people in employment. This corresponds well with National Forest Company generated data on employment growth in tourism and the woodland economy (see paragraphs 4.42 to 4.44).

4.31 In terms of jobs by industrial sector, those with the largest rises are Transport, Storage and Communication; Real Estate, Renting and Business Activities; and Education. The most significant sector to show a fall in jobs was Manufacturing, which fell in each of The National Forest districts from 2001 to 2008 with the exception of North West Leicestershire. Table A4.8 in the Annexes shows the occupational profile of the six National Forest districts for 2008/9 as a percentage of the number of working age people in employment.

Claimant rate unemployment

4.32 Tables 4.20 and 4.21 show the Claimant Count rates for The National Forest from 2005 to 2010. Table 4.20 highlights that Claimant Count performance for The National Forest fluctuated between 1.4% and 1.9% to 2008, rising by around 2% in 2009 to 2010. This is in line with the other comparator areas and highlights macro economic impacts of the economic downturn rather than any Forest specific trend. Whilst The National Forest had a higher rate than Newark and Sherwood and the New Forest, its rate is below both regional and national averages.

Table 4.20: Claimant Count Rate (total claimants as proportion of resident working age population estimates)							
	March 2005	March 2006	March 2007	March 2008	March 2009	March 2010	Change (2005-2008)
National Forest	1.4	1.9	1.8	1.4	3.9	3.6	2.2
Newark and Sherwood	1.6	1.8	1.8	1.4	3.0	3.0	1.4
New Forest	0.8	1.0	1.0	0.8	2.2	2.4	1.6
East Midlands	2.1	2.4	2.4	2.0	4.0	4.1	2
West Midlands	2.7	3.4	3.4	3.0	5.3	5.4	2.7
England	2.3	2.6	2.5	2.2	4.0	4.2	1.9

Source: DC Research analysis of LSOA level data from ONS Crown Copyright Reserved, accessed via NOMIS April 2010
Note: Rates from 2009 onwards are calculated using the mid-2008 resident working age population

4.33 Claimant Count data is a very up to date dataset, and therefore the impact of the economic downturn will be included in Tables 4.20 and 4.21. Table 4.20 shows that the jump in Claimant Count rate from 2008 to 2010 is significant across all comparator areas. Despite this, it is clear that The National Forest has developed into a more robust and diverse economy in comparison to recessions in the early 1980s and 1990s.

4.34 Table 4.21 shows that those that have claimed for more than 12 months rose sharply in 2010, in line with wider comparator trends. Whilst The National Forest has a lower rate than the regional and national averages, the rate went up from 7.4 to 13.7 over this time period, a much higher change than these averages.

Table 4.21: Claimant Count Rate (Claiming for over 12 months)							
	March 2005	March 2006	March 2007	March 2008	March 2009	March 2010	Change (2005-2008)
National Forest	7.4	8.3	11.8	7.7	3.8	13.7	6.3
Newark and Sherwood	6.9	9.3	13.6	8.9	3.7	12.1	5.2
New Forest	6.5	7.9	7.3	6.6	3.9	12.2	5.7
East Midlands	13.9	14.2	16.6	13.2	7.7	15.9	2
West Midlands	13.4	13.4	15.5	11.9	6.9	17.4	4
England	16.0	16.7	20.5	16.9	9.7	19.4	3.4

Source: DC Research analysis of LSOA level data from ONS Crown Copyright Reserved, accessed via NOMIS April 2010
Note: Proportion of resident working age population estimates. Percentage given is that of particular age/duration as a proportion of all age/durations within that particular gender.

Young people not in education, employment or training (NEET)

4.35 Table 4.22 shows performance by upper tier local authority area for National Indicator (NI) 117, showing the rate of 16 to 18 year olds who are not in education, employment or training (NEET). Like NI 110, 117 is an important indicator for The National Forest as it is a priority for each of the three Local Area Agreements covering the Forest area. The data shows that there has been a reduction in the proportion of NEET for all areas.

Table 4.22: % of 16 to 18 year olds who are not in education, training or employment (NEET)					
	2005	2006	2007	2008	change (2005-2008)
Derbyshire	8.2	7.1	6.5	6.7	-1.5
Leicestershire	6.4	5.5	4.6	4.4	-2.0
Staffordshire	7.4	7.6	5.8	5.3	-2.1
East Midlands	7.0	6.4	5.6	5.4	-1.6
West Midlands	10.0	8.9	7.1	7.0	-3.0
England	10.9	7.7	6.7	6.7	-4.2
Source: DCSF - Client Caseload Information System (CCIS) maintained by local authorities/connexions providers.					

Income Support Claimants

4.36 The last two tables in terms of employment present data on Income Support Claimants in The National Forest. This, like other indicators such as Claimant Count, population and deprivation, is a very useful indicator for the Forest, as it is available at the LSOA level, allowing a Forest level analysis as opposed to looking at data at the level of the six districts.

4.37 Table 4.23 shows that there has been little change in the proportion of Income Support Claimants in The National Forest over the past five years, in line with regional and England averages. However the Forest has a higher percentage than Newark and Sherwood of overall claimants, and nearly twice that of the New Forest.

Table 4.23: Proportion of Income Support Claimants (as % of 16+ population)							
	August 2004	August 2005	August 2006	August 2007	August 2008	August 2009	change (04-9)
National Forest	3.4%	3.3%	3.3%	3.2%	3.2%	3.2%	-0.2%
Newark and Sherwood	2.9%	2.8%	2.7%	2.7%	2.8%	2.6%	-0.3%
New Forest	1.9%	1.8%	1.8%	1.8%	1.8%	1.7%	-0.2%
East Midlands	3.1%	3.0%	3.0%	3.0%	3.0%	2.8%	-0.3%
West Midlands	3.8%	3.7%	3.6%	3.6%	3.6%	3.4%	-0.4%
England	3.7%	3.6%	3.5%	3.5%	3.5%	3.2%	-0.5%
Source: DC Research analysis of LSOA level National Forest data/ONS accessed via NOMIS April 2010 **Note**: 1. National Forest rates are calculated on 16+ population, other areas are calculated on working age population 2. 2009 rates are based on 2008 mid year population estimates.							

4.38 Table 4.24 presents the number of Income Support Claimants for The National Forest and each of the comparator areas. In August 2009 there were 5,375 people claiming Income Support in The National Forest.

Table 4.24: Number of Income Support Claimants						
	August 2004	August 2005	August 2006	August 2007	August 2008	August 2009
National Forest	5,515	5,365	5,495	5,430	5,460	5,375
Newark and Sherwood	3,220	3,140	3,030	3,080	3,150	2,990
New Forest	3,250	3,120	3,180	3,230	3,160	3,020
East Midlands	133,180	129,830	129,720	130,910	132,130	124,620
West Midlands	201,980	197,560	195,640	196,020	196,470	183,210
England	1,836,860	1,795,930	1,789,920	1,785,550	1,775,270	1,648,240
Source: DC Research analysis of LSOA level National Forest data/ONS accessed via NOMIS April 2010						

INVESTMENT

4.39 Since Much More Than Trees 2, regeneration funding has shifted from area based programmes to thematic interventions. As a consequence, programmes such as Single Regeneration Budget (including programmes in Burton and Swadlincote) have not been succeeded.

4.40 The 2007 Sustainable Development report highlighted that around £115m was invested between 1995 and 2006 in Forest related projects and regeneration projects and programmes in the area. Table 4.25 updates this information, suggesting that an additional £40.4 million has been invested since 2006. It is notable that a significant proportion of this investment has been in visitor related projects.

Table 4.25: Forest Related Investment and Regeneration

Area of Investment	Key Organisations/Sources	Total
Environmental Improvement Grants	North West Leicestershire District Council, Leicestershire County Council, British Trust for Conservation Volunteers (BTCV)	£761,000
Cycle Trails	National Forest Company (NFC), Leicestershire Economic Partnership (LSEP), SUSTRANS	£1,930,000
Visitor Information Points	Emda, Advantage West Midlands	£1,441,000
Woodfuel and Woodland Management	NFC, Heart of the National Forest Foundation (HNFF)	£200,000
Woodland Business Investment	Rosliston Forestry Centre, South Derbyshire District Council, Derby & Derbyshire Economic Partnership (DDEP)	£825,000
Other visitor related investment	NFC, LSEP, HNFF, National Memorial Arboretum, North West Leicestershire District Council, Youth Hostel Association, Rolls Royce, Charnwood Borough Council	£14,475,700
Forestry Specific Investment	NFC, Green Infrastructure funding, Forestry Commission	£18,537,930
Community Grants	Leicestershire County Council, Leicestershire Rural Partnership	£476,460
Forestry Related Training Schemes	NFC, DDEP and partners	£363,900
Development related planting contributions to The National Forest since 1994*	Developers	£1,185,650
Other Business Investment	DDEP and partners	£228,000
Total		**£40,424,640**

Source: DC Research survey, 24 responses received from 30 requests for information
Note: * A conservative estimate of the previously unrecorded value of development-related landscaping and woodland planting secured in the Forest is £1,185,650. This includes developer contributions towards on-site landscaping and Section 106 funding towards off-site Forest projects. Not previously counted in MMTT2 or 2007 SD report.

4.41 In addition to the investment set out above, there has been significant investment in private sector development and housing activity, as well as significant commercial development activity.

NATIONAL FOREST ECONOMIC MONITORING

National Forest Company Jobs Survey

4.42 For previous iterations of Much More Than Trees, the National Forest Company has conducted in-house research into new jobs that have been created, specifically linked with new Forest projects. In 2009 Tender Scheme winners, forest contractors and advisors and tree nurseries were contacted, plus other relevant organisations such as the British Trust for Conservation Volunteers (BTCV), the Woodland Trust and Conker's Visitor Centre.

4.43 The National Forest Company Monitoring Report found that in total **55.5 new jobs were created and 12 jobs safeguarded between 2003/4 and 2009/10**. Given that this data is based in part on a survey that received responses from just 27% eligible businesses and partner organisations, it is reasonable to conclude that the true number of woodland economy jobs created is likely to be higher.

4.44 Table 4.26 shows that since 1990/1, a total of 333[8] jobs have been created/safeguarded directly related to the Forest's creation. This represents an increase of 25.2% since Much More Than Trees 2 in 2004. The survey also reported the following observations by Tender Scheme winners and forestry contractors and advisors:

Tender Scheme Winners (TSWs):

- Two TSW's and five of their staff have attended in-house training courses by The National Forest Rural Training Project, including chainsaw certification, use of strimmers and chippers, pruning, timber-framing, green-wood working, pesticide certificates and stone walling.
- Of the 27 TSW's that replied, nine felt that their original business had improved and seven had created or diversified into new business ventures, as a result of winning the Tender Scheme (TS).

Forestry Contractors and Advisors (FCAs):

- A number of FCAs mentioned that although they had not directly created any new jobs in their company, they had provided work for several contractors, therefore potentially creating the need for new positions in those companies. Furthermore eight of the 24 FCAs that replied to the survey recognised that their involvement with The National Forest had allowed them to create and diversify into new business.
- Four of the FCAs received woodland-related training as a result of the Forest's development (although more than four people have had training, as several FCA's mentioned that they had had training, but did not specify the numbers of trainees). This included National Proficiency Tests Council Units for chainsaw felling use, training through WEBS (chainsaw, and brushcutter/clearing saw), and various ecological training courses.
- Seven FCAs also felt that they had seen an improvement in their original business activity as a direct result of their involvement with the TS/CLS and National Forest as a whole.

[8] This includes 106 tourism related jobs which are also included in tourism employment figures as set out in Table 4.30.

Table 4.26: The number of jobs created/safeguarded by responding organizations						
	2000/1 report		**2003/4 report**		**2009/10 report**	
Organisation	New jobs	safeguarded	New jobs	safeguarded	New jobs	safeguarded
Jobs from the Woodland Economy						
Tender Scheme	44	14.5	27	25	9.5	2
Forest Contractors / Advisors	22.2	4	19.5	1	4.25	2
Forestry Commission	-	-	-	-	1	-
WEBS	-	-	-	-	24.5	-
BTCV	-	-	1	-	-	1
Woodland Trust	-	-	1.5	-	-	-
NFC	-	-	18.5	-	0.7	-
Staffordshire Wildlife Trust	-	-	-	-	0.2	-
Groundwork	-	-	-	-	-	1
Local Colleges	3	-	-	-	-	-
Subtotal	**69.2**	**18.5**	**67.5**	**26**	**40.15**	**6**
Jobs from the tourism sector						
Conkers	-	-	46.5	15	-	-
Rosliston	-	-	23.5	-	3.5	6
NF YHA	-	-	-	-	8.5	-
NF Camping & Caravan Club	-	-	-	-	3	-
Subtotal	**-**	**-**	**70**	**15**	**15**	**6**
Totals	**69.2**	**18.5**	**137.5**	**41**	**55.15**	**12**
TOTAL jobs created / safeguarded 1990/1 to 2009/10	**333.35**					

Source: National Forest Company Socio-Economic Monitoring Report, February 2010
Note: No new jobs were created by responding tree nurseries

4.45 In addition to the numbers set out in the table, a recent economic impact survey conducted for the National Memorial Arboretum estimated that the Arboretum supports an additional 60 jobs in the local economy as a result of its activities.

TOURISM AND THE VISITOR ECONOMY

Volume and Value of Tourism

4.46 The National Forest Company has commissioned annual volume and value of tourism studies since 2003, with the latest relating to 2008. This includes statistics on tourism employment, visitor spending, visitor numbers and the extent of tourism accommodation in the area, and allows an analysis of visitor trends and the economic impact of tourism over time.

4.47 Volume and value research is undertaken by Global Tourism Solutions (UK) Ltd (GTS) using its Scarborough Tourism Economic Activity Monitor (STEAM) model. This is the model used across many regions including the East Midlands, allowing trend comparisons with other tourism destinations. The STEAM model quantifies the economic impact of tourism from both day and overnight visitors, and provides information on overall visitor numbers, spending and jobs created.

4.48 In terms of its approach, the STEAM model uses monthly data on accommodation bed stocks and occupancy rates, visitor footfall at visitor attractions, attendance at tourism events and Tourist Information Centre visitor figures. This information is collected by tourism destination management partnerships in the Leicestershire and Derbyshire parts of the Forest and by GTS in the Staffordshire area. The model uses postcode data to determine the destination area, so only venues inside The National Forest are included.

4.49 Much More Than Trees 2 used Heart of England Tourist Board economic impact research to model impacts from 1997 to 2002. Whilst the STEAM data used here might not be directly comparable, four indicators are presented below which capture similar trends in tourism and visitor economy performance.

4.50 Table 4.27 sets out visitors to The National Forest by accommodation type.

Table 4.27: Tourist Days (thousands)

Year	2003	2008	% change
Serviced Accommodation	373.4	361.2	-3%
Non-Serviced Accommodation	93.8	180.6	92%
SFR	735.6	720.3	-2%
Day Visitors	6,251.4	7,424.5	19%
Total	**7,454.3**	**8,686.5**	**17%**

Source: DC Research analysis of GTS Ltd / NFC STEAM data

4.51 Table 4.27 shows that the overall number of visitor days to The National Forest has increased by 17% from 2003 to 2008. Over the same period there has been a fall in serviced accommodation and a large rise in non serviced accommodation. This change coincides with notable developments highlighted elsewhere in this report (such as the Youth Hostel Association, Rosliston log cabins and the Caravan and Camping Club site), and also the perception that The National Forest is currently seen as a day visit destination serving local and regional markets.

4.52 In total there were just under 8.7 million visitor days spent in The National Forest in 2008, an increase of well over a million since 2003.

4.53 Table 4.28 shows revenue by category of visitor, with patterns similar to visitor days. In total, visitors contributed revenue in The National Forest of £287.1m in 2008, up from £252.1m in 2003, with by far the largest segment being the day visitor market.

Table 4.28: Tourist Revenue by Category of Visitor (£ millions)

Year	2003	2008	% change
Serviced Accommodation	48.3	37.7	-22%
Non-Serviced Accommodation	3.6	7.9	118%
SFR	26.9	27.4	2%
Day Visitors	173.3	214.1	24%
Total	**252.1**	**287.1**	**14%**

Source: DC Research analysis of GTS Ltd / NFC STEAM data

4.54 Table 4.29 below shows average spend per visitor day to The National Forest.

Table 4.29: Average Spend Per Visitor Day

Year	2003		2008	
	Spend £	Spend / Visitor	Spend £	Spend / Visitor
Serviced Accommodation	48,318,430	£129	37,704,090	£104
Non-Serviced Accommodation	3,595,741	£38	7,852,784	£43
SFR	26,911,652	£37	27,425,485	£38
Day Visitors	173,253,042	£28	214,138,215	£29
Total	**252,078,864**	**£34**	**287,120,574**	**£33**

Source: DC Research analysis of GTS Ltd / NFC STEAM data

4.55 The STEAM data estimates that in 2008 day visitors to The National Forest on average spent around £29 per day, whilst staying visitors spent £104 in serviced accommodation, and £43 in non serviced accommodation. Staying visitors actually spent less per visitor day in 2008 than in 2003, and the overall average spend for all visitor types fell slightly from £34 per day in 2003 to £33 in 2008.

4.56 Table 4.30 shows estimates of total employment supported by tourism by sector in The National Forest. According to STEAM, there were 4,422 full time equivalent jobs supported by tourism in The National Forest in 2008, a 12% rise from 3,959 jobs in 2003. Most of these jobs related to the retail and food and drink sectors.

Table 4.30: Sectors in which Employment is supported (FTEs)

Direct employment / Year	2003	2008	% change
Accommodation	449	455	1%
Food & Drink	877	995	14%
Recreation	421	482	15%
Shopping	1,124	1,289	15%
Transport	213	242	14%
Total Direct Employment	3,083	3,463	12%
Indirect Employment	876	959	9%
Total	**3,959**	**4,422**	**12%**

Source: DC Research analysis of GTS Ltd / NFC STEAM data

Visitor Surveys and Conversion Research

4.57 The value and quality of the Forest's tourism experience has been captured through visitor surveys at a number of tourism attractions. The National Forest Visitor Survey (2007) measured the impact of gateway installations at five tourism attractions (Conkers, Snibston Discovery Park, Ferrers Centre for Arts and Crafts, Sence Valley Forest Park and Rosliston Forestry Centre) on visitors' perceptions and awareness of The National Forest.

4.58 Around 40 gateways have been installed across the Forest, over a three-year period, ranging from The National Forest branded interpretation panels to touch-screen kiosks, sculptures, shelters with interpretation, benches, leaflet units and catering tables. 610 surveys were completed prior to the installation of gateways, and 740 post installation.

4.59 Key socio-economic findings from the 2007 Visitor Survey include:

- The majority of visitors were from areas within or surrounding The National Forest, including Derbyshire (22%), Leicestershire (30%), Staffordshire (13%), the West Midlands (7%) and Nottinghamshire (7%).
- Visitors were predominantly local residents (41%) or on a day trip from home (47%).
- Although predominantly a day visitor destination, a higher proportion of visitors stayed overnight in 2007 (10%; as compared to 4% in 2001).
- A high proportion of visitors were repeat visitors (92%), with 30% visiting on a monthly, weekly or daily basis.
- Most visits were by family groups (61%) and average party size ranged from three to four people. Solitary visitors were relatively rare (6%).
- Most respondents were visiting the attraction because of previous local knowledge of the site (52%) or due to a recommendation by friends and family (25%).
- The most popular activities were walking (75%), visiting attractions (57%), eating and drinking out (43%), visiting woodlands (24%) and wildlife/conservation (19%).
- Most visitors arrived by car (93%, which is in line with 2001 results). Only 1% arrived by public transport, 2% by cycle and 2% on foot.
- Overall enjoyment and satisfaction levels were very high (91%).

4.60 In addition, a separate survey (which received 97 replies) was undertaken at Willesley Wood in 2008, a 42 ha community woodland owned by the Woodland Trust. This aimed to investigate visitors' usage and experience of a local woodland and to provide an interesting comparison to The National Forest Visitor Survey sites.

4.61 Key socio-economic findings from the Willesley Wood Survey include:

- Visitors are mainly from Leicestershire (61%), Derbyshire (31%) and Staffordshire (5%), with the vast majority of people (80%) visiting the site over 20 times a year.
- Willesley attracts mainly solitary visitors (43%) or couples visiting without children (33%), with 60% of visitors visiting daily and 28% weekly.
- The main reasons for visiting include dog walking (64%) and short walks (23%).

- 100% of the respondents stated that they had heard of The National Forest, indicating very high levels of local awareness.

National Forest and Beyond Conversion Research[9]

4.62 In December 2009, The Research Solution was commissioned by the National Forest Company to undertake a campaign evaluation based on their National Forest & Beyond Visitor Guide 2009. The evaluation, based on a sample of 332 survey responses from visitors who had requested The National Forest Visitor Guide, noted that:

- The West Midlands accounted for 13% of visitors who had or intended to visit, with the East Midlands supplying 8%. Almost half (49%) lived within 100 miles from The National Forest.
- Competitor destinations included Wales, Chester, the New Forest, The Cotswolds, Norfolk, Oxford, Torquay and York.
- The main purpose of a visit by respondents who had visited/would be visiting The National Forest included; walking (56%), visiting woodlands (55%) and visiting a historic/heritage site (50%).
- The average length of stay for those that took a short break was 3.9 nights (up from 2.6 nights in 2007). The busiest months are April to June.

WELL BEING

Adult participation in sport

4.63 Table 4.31 shows performance by upper tier local authority area for Adult participation in 30 minutes of moderate intensity sport. This is an important indicator for The National Forest as National Indicator NI 8 (Adult Participation in Active Recreation) is a priority for each of the three Local Area Agreements covering the Forest area. There has generally been no statistically significant change across all locations over recent years.

Table 4.31: Adult participation in 30 minutes, moderate intensity sport

	APS1 (Oct 2005-Oct 2006)	APS2 (Oct 2007-Oct 2008)	APS3 (Oct 2008-Oct 2009)	Statistically significant change from APS 2
	%	%	%	
Charnwood	16.1%	21.1%	16.7%	No Change
East Staffordshire	15.5%	15.7%	14.3%	No Change
Hinckley & Bosworth	15.8%	15.0%	18.3%	No Change
Lichfield	17.4%	14.5%	18.7%	No Change
North West Leicestershire	15.9%	18.6%	15.2%	No Change
South Derbyshire	17.0%	13.6%	12.9%	No Change
New Forest	14.2%	14.3%	16.6%	No Change
Newark & Sherwood	14.1%	15.6%	15.3%	No Change
West Midlands	14.1%	14.5%	15.2%	Increase
East Midlands	14.8%	16.8%	16.6%	No Change
National (overall)	15.5%	16.4%	16.6%	No Change

Source: Source: Sport England's Active People Survey 3 sessions a week (at least 12 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)
Note: This highlights data for 3x30 participation in sport (three sessions a week, moderate intensity, 30 minutes). This is a different measure of participation than the NI8 or KPI1 participation indicators, which are 3x30 sport and active recreation (three days a week, moderate intensity, 30 minutes).

[9] National Forest Campaign Evaluation, The Research Solution for The NFC, 2009.

Life expectancy at birth

4.64 Table 4.32 shows that male life expectancy in the six National Forest Districts is around 78 years, rising at between 1 and 2 years since 2002-4. Table 4.33 for female life expectancy shows a similar rise over the same time period, to around 82. This is in line with regional and national averages, although both male and female life expectancy is higher in the New Forest.

Table 4.32: Male life expectancy at birth

	2002-4	2003-5	2004-6	2005-7	2006-8	change (2002-4 to 2006-8)
South Derbyshire	76.9	77.3	77.9	77.9	78.0	1.1
Charnwood	77.3	77.3	77.9	78.4	79.0	1.7
Hinckley and Bosworth	78.1	78.6	79.0	79.5	79.6	1.5
North West Leicestershire	77.0	77.0	77.3	77.8	77.9	0.9
East Staffordshire	76.0	76.3	76.8	76.9	77.0	1.0
Lichfield	76.3	76.8	78.0	78.4	78.7	2.4
Newark and Sherwood	76.7	77.2	77.8	77.8	77.5	0.8
New Forest	79.2	79.5	80.0	80.4	80.6	1.4
East Midlands	76.5	76.9	77.3	77.6	77.8	1.3
West Midlands	75.9	76.2	76.6	76.9	77.2	1.3
England	76.5	76.9	77.3	77.7	77.9	1.4

Source: Floor Target Interactive, April 2010.

Table 4.33: Female life expectancy at birth

	2002-4	2003-5	2004-6	2005-7	2006-8	change (2002-4 to 2006-8)
South Derbyshire	80.6	80.9	81.6	82.0	81.8	1.2
Charnwood	81.6	81.4	81.8	82.7	82.8	1.2
Hinckley and Bosworth	81.5	81.3	81.4	82.0	82.9	1.4
North West Leicestershire	80.6	80.7	81.3	81.3	81.9	1.3
East Staffordshire	80.6	80.6	80.8	80.8	81.2	0.6
Lichfield	80.0	80.3	80.9	81.6	81.5	1.5
Newark and Sherwood	81.0	81.4	81.3	81.1	81.5	0.5
New Forest	83.4	83.6	84.1	84.1	84.5	1.1
East Midlands	80.7	80.9	81.3	81.6	81.8	1.1
West Midlands	80.6	80.8	81.1	81.4	81.6	1.0
England	80.9	81.1	81.6	81.8	82.0	1.1

Source: Floor Target Interactive, April 2010.

ACTIVE COMMUNITY PARTICIPATION (INCL SOCIAL JUSTICE)

4.64 The National Forest's sustainable development indicators provide a key source of data for aspects of Much More Than Trees 3, particularly in terms of evidence on diversity, accessibility, health and well being. In terms of **Social Justice (Inclusion)**, whilst there is not yet a specific indicator, the National Forest Company promotes social inclusion through involvement in The National Forest's creation and the enjoyment of its attractions.

4.65 The creation of The National Forest contributes to social justice through engagement with and involvement of:

- The **unemployed** in midweek conservation projects (run by the British Trust for Conservation Volunteers); and intermediate labour market trainees.

- **Inner city and urban communities** through free trees schemes; environmental education visits; and Tree for All schools work (run with the Woodland Trust, Forestry Commission and other partners).
- **Black and minority ethnic communities** (BME) through healthy walking; environmental education activity; inner city schools tree planting; and community events (BME communities account for 3% of the Forest's population, with significant concentrations in Burton upon Trent).
- **Disabled groups** through arts projects; healthy walking; and planning of all abilities Forest trails.
- **Single parent families** through involvement in healthy walking.
- **Deprived rural schools** through the Forest Songs project (run with Children's Music Workshop, and more recently VIVA).

Environmental Education

4.66 The National Forest Company estimate that 15% of the 25,000 people participating in the Forest's creation each year and 35,000 children and adults involved in environmental education activity are from socially excluded groups (2010 NFC figures).

4.67 In terms of sustainable development education, the National Forest Company's contribution comprises the promotion of environmental education and lifelong learning and, in terms of sustainable development, measures environmental education activity involving children and adults.

Environmental Education for Schools

- From 1995 to 2006 over 200,000 children experienced Forest-related environmental education visits to Conkers Discovery Centre (Heart of The National Forest Foundation) and Rosliston Forestry Centre (South Derbyshire District Council and Forestry Commission).
- Following the opening of Conkers and expansion of activities at Rosliston these centres have involved over 30,000 children each year since 2001.
- From 2000 to 2006, 372 schools were involved in growing trees from seed, the Tree for All scheme, community tree planting, the Forest Songs project, arts projects and Forest-related events. This includes 75 inner city schools from Birmingham, Leicester, Derby and Nottingham.
- Between 2004 – 2006 over 12,500 children were involved in activities run by Severn Trent Water at their Cropston reservoir centre; and in 2006, 2,500 children experienced activities at Snibston Discovery Park (Leicester County Council).

Figures from "The National Forest: An exemplar of sustainable development (2007).

4.68 Activity in terms of lifelong learning for adults includes:

- Practical conservation training by the British Trust for Conservation Volunteers (BTCV).
- Volunteer healthy walks leader training at Rosliston Forestry Centre.
- Adult and teacher environmental education courses run by Severn Trent, and adult participation in events run by Snibston Discovery Park.

4.69 More recently, BTCV, Heart of The National Forest Foundation and the National Forest Company have been developing the Heart of The National Forest Training project which involves 16 students and the creation of a project coordinator post.

4.70 Table 4.34 shows performance by upper tier local authority area for National Indicator (NI) 110, Young People's participation in positive activities. This is an important indicator for The National Forest given the focus on volunteering, and that NI 110 is a priority for each of the three Local Area Agreements covering the Forest area.

4.71 The data shows that participation has reduced across all geographic areas – with two of the three upper tier authorities exhibiting slightly higher decreases than regional and national trends. National Forest community and educational involvement activity demonstrate an important counter balance to these wider trends.

Table 4.34: Young People's Participation in Positive Activities (NI 110)

Local Authority	Tellus3 (new weighting) (2008-9)	Tellus4 (2009-10)	Change (ppts)
Derbyshire	68.9%	64.6%	-4.3
Leicestershire	69.7%	68.3%	-1.4
Staffordshire	70.5%	64.8%	-5.7
East Midlands	68.1%	64.3%	-3.8
West Midlands	68.0%	63.4%	-4.6
England	68.2%	65.8%	-2.4

Source: DCSF TellUs3 and TellUs4 Surveys

The views of the communities in The National Forest

4.72 Recent work[10] commissioned by the National Forest Company and delivered by Alison Millward Associates gathered **community perceptions** about the creation of The National Forest from 200 residents from urban, rural and former coalfield communities in the Forest. The research was designed to gather perceptions on how the Forest has changed the area, and impacts on daily life.

4.73 Key findings are summarised below:

- Residents were delighted with The National Forest's creation; they appreciate the environmental transformation of the area, that has wiped away the pollution and dereliction of the past.
- Most respondents felt that the Forest had greatly benefitted their local area, making it a more attractive place to live; creating more places to visit and things to do; creating better places for walking; increasing local wildlife; improving facilities for children; bringing more tourists into the area; and helping to increase house prices. There was universal agreement that the new woodlands had improved the landscape for the better.
- Residents felt a deep sense of pride in the area as they watched it improve, and felt rewarded that they had helped to plant trees that are contributing to the Forest's creation. Several people described their emotional attachment, as they watched the trees grow that they had personally planted 5 - 10 years ago.

[10] Community Perceptions of The National Forest (2008) Alison Millward Associates and The National Forest

- People value being able to readily access the footpath system into the woodlands; use of woodlands was highly localised to areas within easy walking distance of homes.
- The vast majority of people, young and old, felt totally safe using the woodlands and commented on the friendliness of people that they meet when using the footpaths. Most people felt safe enough to use the woodlands on their own.
- Most people visited the new woodlands for walking, walking the dog, the scenery, taking the children out, watching wildlife, and cycling.
- A large amount of respondents rated the standard of tree care, path maintenance, information boards, car parks and personal safety as good (57%) or very good (27%).
- Over 75% of those interviewed rated the new recreation and visitor attractions as very good or excellent.
- Almost all respondents felt that it was either important or very important to create major new green spaces in new housing estates.
- When asked to provide their views on any negative effects, a small minority mentioned concerns such as increased visitor numbers in the area, leading to traffic congestion and an anticipated increase in the amount of litter.
- There was widespread support for the National Forest Company and the Forest as a whole; but the community also wanted to know more about the long-term strategy, the involvement of new and future generations and how the landscape will be protected in the future.

Alison Millward and the National Forest Company, 2009.

4.74 In addition to the community perceptions research, local **Citizens Panels** (2008) have contained three Forest related questions within surveys undertaken by East Staffordshire, South Derbyshire and Charnwood Panels, surveying a total of 995 residents across the three districts/boroughs.

4.75 Table 4.35 suggests a significant level of awareness as to the impact of The National Forest's creation and the local environment.

Table 4.35: Do you think that The National Forest has improved the local environment?

Panel	No of responses	Yes	No
South Derbyshire	459	85.2%	10.2%
East Staffordshire	430	82.8%	8.3%
Charnwood	106	91.5%	7.5%

Source: East Staffordshire, South Derbyshire and Charnwood Citizens Panels, 2008
Note: n=995, percentages do not add up due to some instances of non response or multiple options being selected

4.76 Table 4.36 suggests that residents are becoming more aware of the growing Forest in the landscape and making the connection with new public access, recreation and tourism facilities, and evidence of more local wildlife resulting from the Forest's creation. It is also noticeable that relatively high proportions of people are seeing the effects of more local green space being created associated with new development.

Table 4.36: In what ways has The National Forest improved the local environment?			
Panel	South Derbyshire	East Staffordshire	Charnwood
Expanding woodland landscape	81.7%	68.3%	78.3%
New places for walking	74.8%	63.4%	74.5%
New recreation/tourism attractions	55.3%	48.1%	53.8%
More local wildlife	68.4%	53.2%	65.1%
New green space near to housing	44.3%	42.7%	60.4%
Other (comments included greener/healthier environment, better place to live, improved views).	6.7%	7.5%	9.4%
Source: East Staffordshire, South Derbyshire and Charnwood Citizens Panels, 2009 **Note**: n=995, percentages do not add up due to some instances of non response or multiple options being selected			

4.77 Finally, Table 4.37 highlights a desire from residents to engage with the Forest in a range of ways. The interest in Health Walks is notable, although interest is significantly higher in Charnwood in comparison to the other two Panel areas (which include Burton and Swadlincote as significant settlements), with a corresponding higher proportion of residents choosing not to be involved.

Table 4.37: How would you like to get involved in The National Forest in the future?			
Panel	South Derbyshire	East Staffordshire	Charnwood
Tree Planting	16%	13.7%	29.2%
Conservation volunteering	10.9%	10.2%	18.9%
Health Walks	30.4%	22.3%	43.4%
Forest Events (eg. Wood Fair)	19.8%	33.6%	55.7%
Other (eg. school visits, walking groups, sports events)	3.7%	9.9%	8.5%
Not want to be involved	39.7%	32.3%	22.6%
Source: East Staffordshire, South Derbyshire and Charnwood Citizens Panels, 2009 **Note**: n=995, percentages do not add up due to some instances of non response or multiple options being selected			

Growing Places: A study of social change in The National Forest[11]

4.78 The 'Growing Places' study, which took place over six months in 2005, aimed to describe processes of social change brought about by the Forest, with a view to helping the Forestry Commission and the National Forest Company in pioneering a re-imagining of forested places as engines for sustainable development in the UK. The research revealed that the Forest is a significant driver of social change, highlighting ways in which this innovative and progressive model of social forestry is resulting not only in the growth of trees, but also in the growth of communities.

4.79 It was found that The National Forest is closely associated with improving environmental and economic conditions, and these positive perceptions of place feed into a growing trust and support for the 'institutional' Forest (National Forest Company and partner organisations), a willingness to be associated with the Forest brand and an optimistic, forward-looking vision for the area.

[11] Morris, J. and Urry, J. (2006). Growing Places: a study of social change in The National Forest, Forest Research, Farnham. Http://www.forestresearch.gov.uk/fr/INFD-6XCHWF

4.80 The research found linkages between the Forest and the area's changing economy. In particular, 'Growing Places' presents an analysis of the Forest as a catalyst for new networks of co-operation between economic and political actors.

4.81 Furthermore, the research argues that social interactions are the dominant feature of Forest experiences. It found strong linkages between landscape change and developing social capital in the Forest, with forested places providing the setting for the reconfiguration of social networks and new forms of 'connectedness'. It also argues that an increase in access is leading to a significant and positive transformation of the relationship between farmers and the wider community.

Summary of Key Indicators

4.82 Finally, a summary of the key indicators for Much More Than Trees 3 is set out in Table 4.38.

Table 4.38: Summary of Much More Than Trees 3 Key Indicators

SDI heading (Theme)	Data measure (indicator)	Result
Active Community	Young people's participation in positive activities	Range from 64.6% to 68.3%*
Deprivation	Proportion of the population who live in wards / LSOAs that rank within the most deprived 10% and/or 25% wards in the country	Most 10% deprived = 2.9% Most 25% deprived = 12.7%
Deprivation	Economic activity numbers and rates for working population	Range from 81.2% to 89.4%*
Deprivation	Proportion of the unemployed people claiming benefit who have been out of work for more than one year (benefits: working age)	13.7%
Deprivation	Income support claimants as % of population (over 16)	3.2% (5,375 in total)
Economic Growth	Total number of VAT registered businesses in the area per 10,000 population	Range from 28.2 to 40.9 VAT registrations per 10,000 population*
Employment	Median gross weekly earnings workplace based (£) and Median gross annual earnings workplace based (£)	Workplace: Range from £418 to £501* Residence: Range from £432 to £506*
Employment	Median gross weekly earnings residence based (£) and Median gross annual earnings residence based (£)	Workplace: Range from £22,631 to £26,278* Residence: Range from £23,083 to £28,016*
Employment	Proportion of people of working age in employment	Range from 64% to 71%*
Employment	Jobs created and safeguarded in forestry, leisure and Forest-related landscaping	55.5 new jobs created and 12 safeguarded between 2003/4 and 2009/10
Employment	Proportion of the working age population who are unemployed	3.6%
Wellbeing	Life expectancy at birth	Male: range from 77.0 to 79.6* Female range from 81.2 to 82.9*
(Demography)	Total number of people living in The National Forest area	211,063
(Demography)	Percentage change in total population by age bands	+3.57% (2004 to 2008)
(External funding)	Investment and Grant secured	£40.4 million (2007-2010)
(Housing)	Average property price	Range from £162,000 to £182,000*
(Tourism)	Visitors per annum	8,687,000
(Tourism)	Average spend per visitor	£33
(Tourism)	Employment in tourism	4,422 jobs

Source: DC Research, 2010
Note: *This data is only available at district level

5. CATALYTIC IMPACTS OF THE NATIONAL FOREST

Section 5 provides a summary of the findings from the consultations undertaken to support Much More Than Trees 3. It provides an assessment of the wider catalytic impacts of The National Forest, including coverage of strategic added value (e.g. strategic leadership; strategic influence; leverage; synergy; and engagement and trust).

This section captures drivers for progress made since 2004 from economic, tourism, local authority and land management perspectives to understand how the socio-economic changes since 2004 (as set out in previous sections) can be attributed to the development of The National Forest.

Awareness and understanding

5.1 A number of local authority consultees highlighted the involvement of the National Forest Company on their own strategic partnerships, particularly Local Strategic Partnerships. This is a significant resource commitment for an organisation the size of National Forest Company given that the Forest is made up of six districts/boroughs, and three counties, and it reflects the importance of local authorities to The National Forest.

5.2 Whilst all local authorities are clearly engaged and supportive of The National Forest and the National Forest Company, there is a core that is engaged very directly across a range of socio-economic issues and agendas. At the district/borough level, it is those local authorities with the greatest proportion of their area inside The National Forest (namely East Staffordshire, North West Leicestershire and South Derbyshire) that are the most engaged, and also those that exhibit a willingness to take cross border working further on a Forest wide basis.

5.3 For example South Derbyshire District Council uses The National Forest as their main visitor brand in tourism terms, as it is regarded as being more communicable. Furthermore, East Staffordshire is increasingly keen for Burton upon Trent to build on its position as the largest town in the Forest, and North West Leicestershire have developed the 'Our Place' initiative, which seeks to improve design guidance for new homes and neighbourhoods that are aligned with National Forest Company sustainable development principles. These examples demonstrate strong synergy between local authority and National Forest Company thinking.

Socio-economic achievements of The National Forest

5.4 There is a clear consensus that economic partners are increasingly seeing the prospect of the maturity of the Forest as an economic entity in the short to medium term, with a number suggesting that current actions and activity (especially around woodland economy and tourism) will lead to significantly increased impacts over time as the Forest matures.

5.5 A number of stakeholders commented that The National Forest faces an ongoing challenge in engaging with its urban communities, and there are a number of facets to this issue. Firstly, land prices in urban areas limit the opportunity to develop woodland as a low cost land use option, which results in forest related development being contingent on local authorities (either through their own land, or through planning related conditions).

5.6 Anecdotally, some stakeholders suggest that communities are beginning to appreciate the identity of the Forest, but are often more likely to recognise particular locations rather than The National Forest as a whole. This process is beginning to be influenced by the perceptions of incomers to the area.

5.7 A few local authority stakeholders noted that increased engagement from communities often tends to coincide with specific community based planting schemes, with young families in particular benefiting in this regard.

5.8 It is clear that there is more to do to encourage residents in the urban settlements of Burton, Coalville and Swadlincote in particular to discover the Forest, building on the suitability of many of its woodlands and connected facilities in terms of providing for young families. The National Forest Company promotional leaflet produced in 2010 and posted to every household in the Forest will help to further raise awareness alongside the Company's media, tourism and website promotional activity.

5.9 In addition to woodland economy and tourism businesses, SME business networks are beginning to appreciate the value of The National Forest as a brand. For example Lets Go Local (http://www.letsgolocal.co.uk/), a business networking facility based in Ashby De La Zouch, covers over 600 businesses largely around The National Forest, and is encouraging members to make more of their locational association with the Forest.

5.10 A number of stakeholders made reference to the overall viability of the area, especially in the 'Heart of the Forest', where the transformation over the lifetime of the Forest to date has been radical. Relevant stakeholders note that the area has benefited from the creation of the Forest, with areas in the core of the Forest that would otherwise have been unattractive being enhanced and increasingly sellable, with estate agents increasingly marketing property (especially in rural areas) as 'within The National Forest'. The Forest is increasingly benefiting from a rural demand for housing from out commuters to Birmingham to the west, and Derby, Nottingham and Leicester to the east.

5.11 In terms of land values, there is no stakeholder evidence to suggest that The National Forest has an inflationary impact, with the National Forest Company having a track record of being prudent in this regard. It is the case however that many of the opportunities to develop woodland on the least valuable land have been taken, and The National Forest, as a consequence, is increasingly being developed on land for which there are other commercial alternatives. Put simply, as The National Forest grows, there is less available land to buy to convert to woodland.

5.12 However there is little suggestion that commercial and residential property trends in urban settlements are influenced by the creation and development of the Forest.

Investment

5.13 Whilst investment in specific projects has continued in The National Forest, there has been a drop off in terms of programme based funding (compared to the previous investment from programmes such as Single Regeneration Budget and European funding) since Much More Than Trees 2. As a consequence, investment is either linked to the mainstream priorities of local authorities and other service providers, or is linked to specific developments (such as Conkers, Rosliston, National Memorial Arboretum etc.) or thematic priorities (such as WEBS and Making Woods Work in the context of the woodland economy).

5.14 There are also a number of tourism investments (notably the Gateways project which was funded by emda and Advantage West Midlands and provided a series of gateways into the Forest). This reflects a more targeted approach by the National Forest Company to securing external funding and demonstrates its strong strategic leadership role, which is valued by partner organisations.

5.15 Stakeholders are very supportive of Forest related investments and programmes, with WEBS/Making Woods Work being seen as especially effective and innovative. Over and above local authority and National Forest Company investment, sub regional partnerships in the East Midlands (namely Derby & Derbyshire Economic Partnership (DDEP) and Leicester Shire Economic Partnership (LSEP) have tended to be funding channels for emda resources, and are typically brokered by local authorities, although from 2009 funding for economic investment has been routed through new sub national structures.

5.16 Since Much More Than Trees 2, there have been some highly prominent investments made in terms of increasing the capacity of The National Forest around key attractions and facilities. However it should be noted that the investments detailed below are those that have a reasonable causal link to the creation and development of The National Forest. This excludes recent investments in facilities such as Sharpe's Pottery in Swadlincote, the revived FA Academy and the Bass Brewery Visitor Centre, and only investments where The National Forest is the economic driver, or at the very least a key player, have been included in the analysis contained in Section 4 above. These investments demonstrate the increasingly strategic influence of the National Forest Company in working with partners to access wider funding sources.

Rosliston

5.17 Rosliston Forestry Centre, originally established in 1993, employs 12 staff and also engages a number of local suppliers and contractors as the site continues to develop. Rosliston has received funding since Much More Than Trees 2 from a range of partners (notably National Forest Company, Forestry Commission, Derbyshire Economic Partnership[12], the Lottery and South Derbyshire District Council) and others to develop facilities at the site. This includes six small business units, log cabins, an auditorium and the suite of 'Get Active in the Forest' facilities.

5.18 The business units, which are currently being constructed, represent a pilot for The National Forest, and a number of stakeholders are interested to see whether woodland related businesses take up some or all of the available space.

National Forest Caravan & Camping Club

5.19 The National Forest Caravan & Camping Club facility at Moira was opened in September 2007, and is situated adjacent to the Youth Hostel and Conkers. The site has 90 pitches and comprises of a mix of hard and grass standing. The site was developed as part of the same partnership approach that led to the development of Conkers and the Youth Hostel within the Heart of The National Forest.

5.20 The Caravan and Camping Club is open to non members, and reports good levels of occupancy in the three years since opening. It benefits from events at Conkers, and works closely with the Youth Hostel, the National Forest Company and the Heart of The National Forest Foundation (HNFF).

[12] Derby and Derbyshire Economic Partnership up to 2009.

Youth Hostel Association (YHA)

5.21 The Youth Hostel was opened in December 2007, and was the result of a proactive partnership approach led by National Forest Company and Heart of The National Forest Foundation (HNFF), underpinned by a desire to provide group accommodation facilities to compliment the Conkers development. Since opening, the Hostel achieved its three year target in the first full year, and provides for a core market of weekends and school holidays, the education market and young families.

5.22 YHA employs 12 staff (nine of whom come from local communities) equating to 8.5 full-time equivalents, and is open every day as a cafe (with wifi), providing meeting and function facilities (ranging from children's parties to activity days for local schools) in addition to accommodation.

National Memorial Arboretum

5.23 The National Memorial Arboretum (NMA) was conceived as a millennium project, established in 1997 and opened to the public in 2001. The NMA comprises 150 acres of trees and memorials devoted to the concept of Remembrance, with visitor numbers having grown from 130,000 in 2007 to 295,000 in 2008. There is an interesting distinction between the NMA as an arboretum and The National Forest as a managed working forest. As such it will develop into 'profile woodland' in the context of the wider Forest.

5.24 NMA represents a key visitor asset to the Forest in terms of links to Lichfield, providing visitor facilities in an important outlying part of The National Forest, and as such it is important that it is fully engaged in any key attraction approach to tourism.

There is recognition that a number of the visitor economy related developments (notably Conkers, the Youth Hostel and the Caravan and Camping Club) have represented supply led 'leaps of faith' amongst a core of The National Forest stakeholders that to date have delivered against (and often beyond) original expectations. Ongoing 'opportunity spotting' is a key role for the National Forest Company and its core of key partners.

Conkers and Heart of The National Forest Foundation

5.25 The role of the Heart of The National Forest Foundation (HNFF) is important in this context of supply led development. HNFF's vision is to create a vibrant heart in the midst of The National Forest transforming dereliction and creating environmental, educational and recreational facilities for people to enjoy in perpetuity. This has included, with partners, the creation of Conkers, as well as a partnership role in the development of woodland and visitor facilities such as the Youth Hostel and the Caravan and Camping Club.

5.26 The Foundation was formed by a partnership of private sector individuals with East Midlands Development Agency, Leicestershire County Council, the National Forest Company, North West Leicestershire District Council and the Ashby Woulds Regeneration Forum.

Future socio-economic impacts

5.27 Stakeholders and partners in The National Forest have a confident and forward looking approach, recognising the Forest's growing economic and social potential. There is a clear expectation that the best is yet to come in terms of socio-economic benefits, and this provides a strong platform for future development and cooperative working, and positively positions the Forest to maximise future opportunities and developments.

5.28 Many stakeholders have noted that plantings are much more visible, with a consensus amongst tourism stakeholders that The National Forest is reaching a point where it is becoming viable in marketing terms as a forest destination – it is increasingly being seen as an emerging destination. Therefore destination management will increasingly need to maximise the visitor potential of the Forest, and increasingly act Forest-wide to do so.

5.29 There is consensus that the Destination Management Partnerships in Leicester and Leicestershire (Leicestershire Promotions) and Derbyshire have to date been more engaged with The National Forest related developments than Staffordshire, and a number of consultees have suggested that this has led to an eastwards leaning focus to tourism in The National Forest over the last five years.

5.30 A number of tourism stakeholders made reference to a need to better link together attractions, and to include significant attractions near to, but outside, The National Forest boundary. Leicestershire Promotions' recent approach (http://www.stayplayexplore.co.uk, linking Snibston and Conkers with Twycross Zoo, National Space Centre and Bosworth Battlefield) was cited as being a step in the right direction in this regard, although from a Forest perspective it would be beneficial to broaden this out to encompass Forest based and adjacent attractions in Derbyshire and Staffordshire.

5.31 A number of economic development and tourism related stakeholders have highlighted that the current accommodation base in The National Forest is low, and could currently present a barrier to any strategic approach to grow the proportion of overnight stays into the medium term.

5.32 Tourism information is an area where The National Forest has benefitted from collaboration, with Forest related branding being used from 2005 by East Staffordshire, North West Leicestershire and South Derbyshire, and the whole Forest benefitting from the Tourism Gateways project. Many stakeholders are encouraged at the willingness of partners to investigate the adoption of a more holistic approach to locality branding in this regard. This demonstrates strong synergy in strategic thinking between the National Forest Company and partner organisations.

5.33 Similarly to tourism, many stakeholders are clear that economic benefit and impact will increase significantly from woodland related activity as the Forest matures in the short to medium term. For example, developments at Staunton Harold (e.g. The Gardener's Bothy), a growth in forestry contracting capacity (including farmers diversifying as a result of the Tender Scheme), and the growing availability of chipping and timber from early thinning operations will grow the employment base and support small businesses into the medium term. The strategic leadership role of the National Forest Company in developing the woodland economy is recognised by partner organisations.

5.34 Some consultees highlighted the projected number of new homes that were to be built in Burton upon Trent, South Derbyshire and Coalville, adding around 60,000 residents to the population of The National Forest. Whilst welcomed, there are concerns about how this growth (and wider growth in out-commuting as The National Forest increasingly gets recognised as a great place to live) might impact on jobs and housing affordability in indigenous communities.

5.35 A number of local authorities also use The National Forest as part of their approach to marketing their area (and specifically their development sites) in terms of inward investment.

Strengths and Opportunities

5.36 There are a range of key strengths and opportunities in terms of the socio-economics of The National Forest that have been highlighted through the consultations undertaken as part of Much More Than Trees 3. These include:

- National Forest Company very good at working with a range of funders and delivering.
- Almost a 'free good' in that The National Forest is accessible to all and very inclusive.
- Central location, visitor catchment and accessibility.
- Commitment from a strong core of Local Authorities, and cross border.
- Growing capacity (trees, accommodation and bedspace) beginning to create a critical mass.
- It is the right time to be doing environment/health/ green approaches. Raising awareness of The National Forest with local business communities.
- Reinforce National Forest Company relationships with tourism businesses - opportunity to support any destination management approach.
- The development of a consistent National Forest brand is a key opportunity.
- The National Forest could be a major influence upon future built environment ('place shaping'), and influence both developers and consumers.
- The National Forest Tourism partnership brand gives core local authorities a level of national recognition.
- Partnership work across The National Forest could extend towards coordinated approaches to inward investment.
- Potential to continue to grow The National Forest as a destination as the physical product matures.
- National Forest brand developing and working well.
- National Forest Company has a wide range of interests, and adds value to local authority work.
- An established organisation with a developing brand. It enables other organisations to achieve their priorities.
- The National Forest is a natural resource, and will continue to get better over time (especially in the next 10 years).
- The National Forest provides focus to the area, and is providing economic opportunities for local people.
- Potential growth in terms of tourism and economic development.
- A really strong tourist destination for the future.
- An attractive environment is good for inward investment. This must be balanced with jobs created in the Forest.
- Business growth in line with The National Forest (i.e. Wood Fair etc).
- Climate change, with National Forest Company being a 'green exemplar'.
- Engagement with the wider rural economy, and improve reputation and access to resources for The National Forest.
- Expand remit of National Forest Company to become a brand in its own right and begin to self sustain.
- Opportunity to have a more diverse economy.
- Put itself in the family market place at a national level.

Barriers and Threats

5.37 There are also a number of specific barriers and challenges that partners in The National Forest will need to make progress against to maximise socio-economic benefit. These include:

- Lack of National Forest Company resource and staff capacity. Very small team and a very big area, and are therefore necessarily careful when taking the lead.
- The National Forest is still a fledgling forest, and is still developing.
- Slight resentment from some younger farmers who want to grow their business, and see The National Forest as a threat to their ability to grow their business as a farm.
- Long term nature of the initiative can make it hard work to keep people engaged with the long term vision.
- Lack of understanding about The National Forest outside the East and West Midlands.
- Linkages across the forest and formal forms of engagement with National Forest Company.
- Lack of clarity around 'place' - i.e. the recognised administrative status of The National Forest boundary.
- Different levels of commitment across the local authorities.
- Trees are not quite there yet in tourism terms.
- Urban parts of The National Forest 'not pretty'.
- Remaining misunderstanding as to The National Forest objective - many farmers do not engage.
- Governance is not locally based (Secretary of State makes appointments to the National Forest Company Board, and thus some see this as not locally accountable).
- Lack of consistent application of The National Forest brand across The National Forest
- Growth of National Forest creates new issues - land availability increasingly difficult (easy hits and diminishing returns).
- Public transport infrastructure (with improvements needed in terms of rail access in particular).
- Sustaining Public Sector support.
- Having the resources to deliver The National Forest 'dream' (i.e. planting & thinning to create a quality environment over and above planting targets).
- Towns tending to be less well engaged than rural communities.
- Balance of forestry development over competing land use - increasing demands for food security.
- Slowing of the pace of the growth of The National Forest.
- The National Forest becoming a commuter destination.
- Attractions and places competing and not collaborating.
- Relative priority of The National Forest to its key partners. Could be vulnerable as a 'nice to have'.
- Funding, especially risk around the DEFRA block grant and public sector support to tourism
- Securing the ongoing commitment of local authorities and key stakeholders.

Conclusion

5.38 The findings from discussions with consultees highlight the wider catalytic impacts of The National Forest and the role of the National Forest Company in providing strategic leadership and influence to help drive forward new initiatives. There is evidence of strong synergy between the Company and partner organisations in their future aspirations for the Forest area and how its socio-economic potential can be maximized.

5.39 The National Forest Company is seen as a trusted partner with a strong track record of successful delivery. It is also seen as a key player in continuing to invest in the area and in working with the public, private and voluntary sectors, landowners and local communities to help them access additional outside funding. This significantly benefits and adds value to the wider economy and the quality of life of the Forest's communities.

6. CONCLUSION AND RECOMMENDATIONS

This final section of Much More Than Trees 3 summarises the key aspects of socio-economic impact of The National Forest over the last five years. It includes recommended areas for action to improve and sustain the socio-economic impact of The National Forest over the next five years.

Summary of key points and progress since 2004

6.1 In broad terms the **socio economic position of The National Forest continues to improve**, building on the positive progress identified in Much More Than Trees 2 in 2004. The process of **post coalfield regeneration has continued** and there is strong evidence that The National Forest continues to play an important role in the socio economic development of the area.

6.2 The economic profile of the area has performed well in relation to regional and national trends, and to comparator areas. **Economic activity rates outperform regional and national averages** and whilst the long term unemployment rate has narrowed significantly in relation to these averages, it remains lower. **Business growth is strong**, evidenced by VAT registrations, with strong growth in the tourism economy and steady growth in the woodland economy. The **impact of the economic down turn** is beginning to be notable in more recent datasets, but economic activity and employment rates suggest the area is **holding its own and maintaining its position** relative to wider trends and comparator areas.

6.3 The area has enjoyed **above average population growth** (particularly in the 45+ categories) and has a relatively **healthy property market**, which has improved markedly over the lifetime of the Forest. There have also been **improvements in multiple deprivation**, although pockets remain in some former coalfield areas, such as Coalville and Swadlincote and parts of Burton upon Trent.

6.4 There is a growing sense of community engagement, cohesion and pride in the Forest as it matures. **Community and visitors' support for the Forest is strong**, as evidenced in research studies, surveys and activities linked to the Forest's creation and enjoyment. This suggests more active community participation in the area than wider, national trends.

6.5 Stakeholders and partners in The National Forest have a **confident and forward looking approach**, recognising the Forest's growing economic and social potential. There is a clear **expectation that the best is yet to come in terms of socio-economic benefits**, and this provides a strong platform for future development and cooperative working, and positively positions the Forest to maximise future opportunities and developments.

6.6 Overall **stakeholders are very positive about the current and future potential impacts of The National Forest.** There is a clear consensus that economic partners are increasingly seeing the prospect of the maturing of the Forest as an economic entity in the short to medium term, with a number suggesting that current actions and activity (especially around woodland economy and tourism) will lead to **significantly increased impacts over time as the Forest matures**.

6.7 Many stakeholders have noted that perceptions of plantings are much more visible, with a consensus amongst tourism stakeholders that The National Forest is reaching a point where it is becoming viable in marketing terms as a forest destination – it is **increasingly being seen as an emerging destination**. Therefore destination management will increasingly need to maximise the visitor potential of the Forest, and increasingly act Forest wide to do so.

RECOMMENDATIONS

Statistical recommendations

6.8 Much More Than Trees as an exercise is carried out around every five years, and as a consequence there is often a high degree of change and evolution in datasets and statistical approaches that can create issues of comparability with past reports. Whilst much of this is unavoidable, **The National Forest (and its partners and stakeholders) would benefit from having its geography firmly established in socio-economic terms in its own right,** as this would negate the need for bespoke geographies to be created either on a ward basis (Much More Than Trees 2) or on a lower super output area basis (Much More Than Trees 3).

6.9 Whilst it will remain the case that many indicators will be available at The National Forest level, it would be worthwhile for the National Forest Company to consider approaching the County Observatories (in the first instance) and the NOMIS/Office for National Statistics to test whether a more formal statistical definition for The National Forest area is feasible.

Actions to maximise existing and future impacts

6.10 From stakeholder discussions held as part of Much More Than Trees, there are some areas where the National Forest Company, and partners, might consider taking action to maximise potential future impacts.

6.11 A number of local authority partners felt that it would be necessary to **segment The National Forest's stakeholder base** on occasion to set priorities and take decisions, especially in instances of Forest-wide collaboration. One suggestion is a 'Chief Executive's' group comprising of the six districts/boroughs and the National Forest Company, meeting on a task and finish basis, as current consultation was often too mixed to enable senior decision makers to fully engage and influence debates. This would support pan Forest case making, as well as support joint tourism and economic development priority setting and investment decision making.

6.12 This issue has been raised with other similar stakeholders and has been broadly supported, suggesting that there is merit in the development of such an approach, although its success would be entirely contingent upon ensuring senior commitment from (at least) a core of Forest local authorities.

6.13 This process has already begun to be achieved in terms of tourism development and further progress can continue to embed The National Forest in wider socio-economic agendas. For example, a number of consultees **likened the administrative challenges of working towards a pan Forest approach to that of a National Park**, and continuing to develop a collaborative approach to design guidance, building standards and urban green space policy on a 'pan Forest' basis would be an immediate benefit. This allows The National Forest to benefit from a collective approach in communicating standards and expectations to developers.

6.14 **Transport, and public transport in particular**, was regularly raised by stakeholders as an issue **to be addressed for the area in the medium to long term**, and whilst a developing National Forest is not the sole driver for which decisions on sustainable transport solutions will be prioritised and decided upon (including the National Forest railway line and bus development and promotion), it is important that the National Forest Company continues to be fully engaged in transport policy development across the Forest, and promotes sustainable transport activities where possible.

6.15 At the regional (and strategic sub regional level), economic arguments and initiatives are likely to gain more support if a **'pan Forest'** case is made for prioritisation based on mainstream economic development priorities. In the current economic climate, it is likely that without evidence of clear contribution to priorities and collaboration across all the Forest district and borough local authorities, opportunities for economic development investment will be limited.

6.16 In parallel, there is some desire for a **focussed 'key attractions' group** among some economic development and tourism stakeholders at a Forest level (and in its hinterland), and some support for **formal destination management at the Forest wide level at some point in the medium term** to maximise the potential visitor economy benefits of a maturing National Forest.

ANNEX 1: LIST OF CONSULTEES

Table A1.1: Consultees

Name	Organisation
Nigel Russell	Advantage West Midlands
Angus Hancock	Cameron Forestry
Geoff Parker	Charnwood Borough Council
Martin Tincknell	Charnwood Borough Council
Jim Oribine	Derby Destination Management Partnership (Visit Peak District & Derbyshire)
Melanie Cave	Derbyshire County Council
Brenda Smithurst	Derbyshire Economic Partnership
Andy O'Brien	East Staffordshire Borough Council
Richard Tulloch	EMDA
Charles Meynell	Fisher German Estate Agents
Mike Ballantyne	Heart of The National Forest Foundation
Lindsay Orton	Hinckley and Bosworth Borough Council
David Friesner	Leicester Shire Promotions
Robert Raburn	Leicestershire County Council
Matthew Kempson	Leicestershire County Council / Leicestershire Rural Partnership
Peter and Dawn White	National Forest Camping and Caravanning Club
Steve Brindle (Regional Manager)	National Forest YHA
Charlie Bagot-Jewitt	National Memorial Arboretum
Steve Bambrick	North West Leicestershire District Council
Debbie Chesterman	Rosliston Forestry Centre
Richard Beldon	Small Business Network
Stuart Batchelor	South Derbyshire District Council
Mike Roylance	South Derbyshire District Council
Jonathan Vining	Staffordshire County Council
Penny Wilkinson	The National Forest Company
Clive Keble	The National Forest Company

ANNEX 2: DEFINING THE BOUNDARY OF THE NATIONAL FOREST

The National Forest Company and DC Research defined The National Forest by Lower Super Output Areas (LSOA), with a 'best fit' judgment being made on an individual LSOA basis in terms of settlement and area as to whether each LSOA should be included in The National Forest (or not).

This detailed process has resulted in a more precise definition of The National Forest for Much More Than Trees 3, with LSOAs being either included or excluded on a case by case basis, and this was done following consultation with research staff at Derbyshire, Leicestershire and Staffordshire County Councils.

The starting point for the analysis was the full and partial ward list used in Much More Than Trees 2. All LSOAs contained in 'full wards' were included as part of The National Forest, and all those wards excluded for that report were also excluded. The study team then took the 'partial wards' from Much More Than Trees 2, and included or excluded LSOAs in the analysis on a case by case basis, on the basis of a geographic and settlement based best fit with the official boundary of The National Forest.

As a result, the list of LSOAs set out in the Tables below represent the best possible statistical definition of The National Forest using LSOAs as building blocks.

Table A2.1: Derbyshire			
District	**Ward Name**	**Lower Super Output Area Name**	**LSOA Code**
South Derbyshire	Church Gresley	Church Gresley - Castle Road	South Derbyshire 010A
		Church Gresley -Maurice Lea Park	South Derbyshire 010B
		Old Church Gresley	South Derbyshire 010C
	Hartshorne & Ticknall	Goseley	South Derbyshire 010D
		Ticknall and Hartshorne	South Derbyshire 006A
		Cathedrals	South Derbyshire 007A
	Linton	Drakelow/Rosliston	South Derbyshire 011A
		Linton	South Derbyshire 011B
		Castle/Coton Park	South Derbyshire 011C
	Melbourne	Staunton Harold	South Derbyshire 006D
	Midway	Midway -Wellwood	South Derbyshire 007B
		Midway - Springwood	South Derbyshire 007C
		Midway - Elsmleigh	South Derbyshire 007D
		Midway - Lower	South Derbyshire 007E
		Midway - West	South Derbyshire 008A
	Newhall & Stanton	Newhall - Woods Lane	South Derbyshire 008B
		Stanton and Newhall	South Derbyshire 008C
		Newhall - Plummer Road	South Derbyshire 008D
		Newhall - Oversetts	South Derbyshire 008E
		Newhall - Meadow Road	South Derbyshire 008F
	Repton	Newton Solney/Bretby	South Derbyshire 005A
	Seales	Netherseal	South Derbyshire 011D
		Coton in the Elms/Walton on Trent	South Derbyshire 011E
		Overseal/Walton on Trent	South Derbyshire 011F
	Swadlincote	Swadlincote - Darklands	South Derbyshire 009A
		Swadlincote - Centre	South Derbyshire 009B
		Swadlincote -West	South Derbyshire 009C
		Swadlincote -Westfield Park	South Derbyshire 009D
	Woodville	Woodville Woodlands	South Derbyshire 010E
		Swadlincote Woodlands	South Derbyshire 010F
		Woodville	South Derbyshire 010G

Source: DC Research analysis of The National Forest Boundary, 2010

Table A2.2: Leicestershire			
District	**Ward Name**	**Lower Super Output Area Name**	**LSOA Code**
Charnwood	Forest Bradgate	Bradgate and Beacon	Charnwood 016A
	Loughborough Outwoods	Loughborough Outwoods West	Charnwood 010B
	Shepshed East	Shepshed South	Charnwood 006A
	Shepshed West	Shepshed South West	Charnwood 005A
Hinckley & Bosworth	Groby	Groby North	Hinckley and Bosworth 002C
	Markfield	Markfield West	Hinckley and Bosworth 001A
		Markfield East	Hinckley and Bosworth 001B
		Fieldhead	Hinckley and Bosworth 001C
		Stanton Under Bardon & Copt Oak	Hinckley and Bosworth 001D
	Ratby	Bagworth & Thornton	Hinckley and Bosworth 001E
		Ratby North	Hinckley and Bosworth 003C
	Twycross and Witherley with Sheepy	Witherley	Hinckley and Bosworth 008D
		Twycross & Sheepy	Hinckley and Bosworth 004E
North West Leicestershire	Ashby Castle	Ashby Castle South	North West Leicestershire 006A
		Ashby Castle North	North West Leicestershire 003A
	Ashby Holywell	Ashby Holywell West	North West Leicestershire 003B
		Ashby Holywell East	North West Leicestershire 003C
		Ashby Holywell Centre	North West Leicestershire 003D
	Ashby Ivanhoe	Willesley	North West Leicestershire 006B
		Ashby Ivanhoe East	North West Leicestershire 006C
		Ashby Ivanhoe West, Shellbrook and Willesley	North West Leicestershire 006D
	Bardon	Bardon	North West Leicestershire 011A
	Coalville	Coalville Stephenson Way	North West Leicestershire 010A
		Coalville Centre	North West Leicestershire 010B
		Coalville Belvoir Road	North West Leicestershire 010C
	Greenhill	Greenhill Centre	North West Leicestershire 009A
		Greenhill East	North West Leicestershire 009B
		Greenhill North East	North West Leicestershire 009C
		Greenhill Castle Rock	North West Leicestershire 009D
		Coalville Community Hospital	North West Leicestershire 009E
	Hugglescote	Hugglescote Centre	North West Leicestershire 011B
		Donington le Heath	North West Leicestershire 013A

Table A2.2: Leicestershire			
		Ellistown & Battleflat	North West Leicestershire 013B
	Ibstock and Heather	Ibstock East & Battram	North West Leicestershire 013C
		Ibstock South West & Heather	North West Leicestershire 013D
		Ibstock North West	North West Leicestershire 013E
		Ibstock Centre	North West Leicestershire 013F
	Measham	Measham South	North West Leicestershire 012B
		Measham North	North West Leicestershire 012C
		Measham Centre	North West Leicestershire 012D
	Moira	Norris Hill, Ashby Woulds & Albert Village	North West Leicestershire 008A
		Moira Central & Norris Hill South	North West Leicestershire 008B
		Blackfordby & Norris Hill North	North West Leicestershire 008C
	Oakthorpe and Donisthorpe	Donisthorpe North & Oakthorpe West	North West Leicestershire 008D
		Donisthorpe South & Oakthorpe East	North West Leicestershire 008E
	Ravenstone and Packington	Normanton & Packington	North West Leicestershire 005A
	Ravenstone and Packington	Ravenstone Centre & Sinope	North West Leicestershire 005B
	Snibston	Snibston East	North West Leicestershire 010D
		Snibston North West	North West Leicestershire 011C
		Snibston South West	North West Leicestershire 011D
	Thringstone	Thringstone Centre	North West Leicestershire 004A
		Thringstone South	North West Leicestershire 004B
		Thringstone East	North West Leicestershire 004C
	Valley	Coleorton, Farm Town, Lount & Staunton Harold	North West Leicestershire 005D
		Swannigton & Peggs Green	North West Leicestershire 004D
	Whitwick	Whitwick East	North West Leicestershire 007A
		Whitwick South	North West Leicestershire 007B
		Whitwick Centre	North West Leicestershire 007C
		Whitwick West	North West Leicestershire 007D

Source: DC Research analysis of The National Forest Boundary, 2010

Table A2.3: Staffordshire		
District	**Ward Name**	**Lower Super Output Area Code**
East Staffordshire	Anglesey	East Staffordshire 011A
		East Staffordshire 011B
		East Staffordshire 011C
		East Staffordshire 011D
	Branston	East Staffordshire 013A
		East Staffordshire 013B
		East Staffordshire 013C
		East Staffordshire 013D
		East Staffordshire 013E
	Crown	East Staffordshire 006C
	Eton Park	East Staffordshire 008A
		East Staffordshire 008B
		East Staffordshire 008D
	Horninglow	East Staffordshire 007A
		East Staffordshire 007B
		East Staffordshire 007C
		East Staffordshire 007D
		East Staffordshire 007E
	Needwood	East Staffordshire 015A
		East Staffordshire 015B
		East Staffordshire 015C
		East Staffordshire 015D
	Shobnall	East Staffordshire 009A
		East Staffordshire 009B
		East Staffordshire 009C
		East Staffordshire 009D
	Stapenhill	East Staffordshire 014A
		East Staffordshire 014B
		East Staffordshire 014C
		East Staffordshire 014D
		East Staffordshire 014E
	Stretton	East Staffordshire 005D
	Tutbury and Outwoods	East Staffordshire 004F
	Winshill	East Staffordshire 010A
		East Staffordshire 010B
		East Staffordshire 010C
		East Staffordshire 010D
		East Staffordshire 010E
	Yoxall	East Staffordshire 006E
		East Staffordshire 006F
Lichfield	Alrewas and Fradley	Lichfield 002A
		Lichfield 002B
Source: DC Research analysis of The National Forest Boundary, 2010 **Note**: Staffordshire have not allocated names to lower super output areas		

Figure A2.1: LSOA Definition of The National Forest

Source: National Forest Company, based on DC Research analysis of LSOAs and The National Forest boundary

ANNEX 3: SELECTING COMPARATOR AREAS

The Forest's performance is assessed against the performance of comparator areas elsewhere. This involved the selection of a '**condition**' comparator (i.e. an area with similar industrial, economic and population characteristics to The National Forest elsewhere in the country), and an '**aspirational**' comparator (i.e. an area that The National Forest could aspire to match in terms of socio-economic development).

Options for comparator areas were considered from a long list of forestry; leisure based economic activity; and former coalfield areas. From this long list, the National Forest Company and DC Research selected Newark and Sherwood as a 'condition' comparator, and the New Forest as an aspirational comparator.

The New Forest

The New Forest local authority district in Hampshire covers most of the New Forest National Park (created in 2005). It has a total area of 753 square kilometres, and a population of over 175,000 people (making it one of the largest lower tier authorities in England).

In terms of settlements, there are a range of small towns inside and around the Forest, which is bordered by Bournemouth, Christchurch and Southampton.

Newark & Sherwood

Newark & Sherwood is a local authority district in the east of Nottinghamshire. It has a total area of 651.3 square kilometres, and a population of 113,000. Key urban settlements include Newark, Ollerton and Southwell, although the district is predominantly rural, with significant forestry plantations.

Table A3.1: EDI Ranking of shortlisted comparator areas, National Forest and local authority districts

Rank of district level population-weighted average rank on EDI		1999	2000	2001	2002	2003	2004	2005
Newark and Sherwood		142	134	132	138	147	154	154
New Forest		262	262	258	263	270	258	268
The National Forest	Charnwood	264	252	254	261	258	273	276
	East Staffordshire	178	176	176	186	199	208	209
	Hinckley and Bosworth	276	269	270	275	268	276	283
	Lichfield	246	239	231	234	235	235	240
	North West Leicestershire	205	196	203	206	214	213	220
	South Derbyshire	207	198	189	198	215	222	222

Source: 2008 Economic Deprivation Index, analysed by DC Research.

ANNEX 4: ADDITIONAL DATA TABLES

Table A4.1: Economic deprivation index 2009, income domain (The National Forest LSOA in the top 10% (BOLD), and top 25% most deprived)

LSOA code	LSOA name	LSOA EDI Rank (1=the most deprived)						
		1999	2000	2001	2002	2003	2004	2005
E01025934	**North West Leicestershire 009C**	**1664**	**1545**	**1153**	**1560**	**1111**	**1216**	**1932**
E01029450	**East Staffordshire 014B**	**2781**	**2557**	**2850**	**2604**	**2741**	**3207**	**2606**
E01025932	**North West Leicestershire 009A**	**2740**	**2997**	**2259**	**2499**	**2201**	**2815**	**2847**
E01029468	**East Staffordshire 010A**	**1846**	**1583**	**1319**	**1657**	**1621**	**3019**	**2848**
E01019863	**South Derbyshire 008D**	**2558**	**3517**	**3071**	**4168**	**3127**	**2689**	**2998**
E01019842	South Derbyshire 010D	3658	3658	3386	2882	2692	2596	3322
E01029437	East Staffordshire 007D	4553	3568	3777	2613	3252	3811	3676
E01029453	East Staffordshire 014E	2749	3079	3385	3725	3861	4443	3806
E01029427	East Staffordshire 008B	4284	3743	5463	4042	3544	4133	3894
E01029445	East Staffordshire 009A	2556	2343	1710	1492	2508	2522	3954
E01019858	South Derbyshire 007D	5120	4820	6412	5826	5238	4183	5482
E01019856	South Derbyshire 007B	7293	7045	7925	5987	6869	7767	5603
E01029472	East Staffordshire 010E	5290	4963	6313	5461	5232	5737	5849
E01029426	East Staffordshire 008A	5762	6052	4653	5315	6628	6197	6012
E01029408	East Staffordshire 011B	6163	6021	5047	5973	6043	6961	6965
E01025949	North West Leicestershire 012D	8075	7965	8229	8061	7674	7022	7018
E01029409	East Staffordshire 011C	8311	6801	7041	7733	9161	7607	7407
E01029447	East Staffordshire 009C	7545	5433	5837	6934	6474	6314	7772
E01019844	South Derbyshire 007A	10117	9693	10458	11487	9471	9173	8065

Source: The Economic Deprivation Index 2009, analysed by DC Research.

Table A4.2: Economic deprivation index 2009 – employment domain (The National Forest LSOA in the top 10% (BOLD) and top 25% most deprived)

LSOA code	LSOA name	LSOA EDI Rank (1=the most deprived)						
		1999	2000	2001	2002	2003	2004	2005
E01029427	**East Staffordshire 008B**	**4004**	**3045**	**2793**	**2167**	**1967**	**2643**	**2192**
E01025934	**North West Leicestershire 009C**	**2885**	**2134**	**1834**	**3228**	**2058**	**1909**	**2338**
E01029450	**East Staffordshire 014B**	**3310**	**2708**	**2732**	**3438**	**3672**	**3833**	**2847**
E01019863	**South Derbyshire 008D**	**2788**	**3697**	**2794**	**3016**	**2674**	**2543**	**3220**
E01029437	East Staffordshire 007D	6289	4564	4058	4665	3987	4237	3748
E01029445	East Staffordshire 009A	4073	3608	4492	3413	5105	4877	4172
E01019842	South Derbyshire 010D	4125	4923	4430	2982	4937	3611	4236
E01029453	East Staffordshire 014E	3230	3830	3727	4301	5205	6398	4491
E01019856	South Derbyshire 007B	6311	5238	5154	4683	4765	6412	4500
E01025932	North West Leicestershire 009A	4873	4735	4312	3191	4554	3896	4762
E01029468	East Staffordshire 010A	4254	2735	3642	3167	3832	4972	5610
E01025949	North West Leicestershire 012D	7627	7263	8416	8037	7726	8005	5831
E01029447	East Staffordshire 009C	6999	4530	4478	6371	5139	6986	6724
E01019877	South Derbyshire 009B	10898	13633	11456	9104	9931	7636	6792
E01029436	East Staffordshire 007C	4595	5289	5176	5511	6597	6471	7080
E01019838	South Derbyshire 010C	8591	7619	7915	7186	7578	7195	7138
E01029409	East Staffordshire 011C	7332	6685	5956	6332	6294	6996	7542
E01029426	East Staffordshire 008A	6536	7969	7402	5688	8258	7414	7628
E01029452	East Staffordshire 014D	5467	6870	6611	7367	10034	8305	7811
E01029472	East Staffordshire 010E	8504	9198	8551	8288	9240	10215	7844
E01019858	South Derbyshire 007D	5857	5750	6913	6544	5772	6498	7889

Source: The Economic Deprivation Index 2009, analysed by DC Research.

Table A4.3: Economic activity rate (male/female)										
	Jul 2005-Jun 2006		Jul 2006-Jun 2007		Jul 2007-Jun 2008		Jul 2008-Jun 2009		change (2005-6 to 2008-9)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
South Derbyshire	90.5	88.4	82.1	78.1	85.3	81.8	91.2	75.3	0.7	-13.1
Charnwood	86.5	81.6	85.7	80.9	90.9	78.4	84.9	79.1	-1.6	-2.5
Hinckley and Bosworth	91.7	78.0	88.7	75.0	85.7	75.8	87.0	78.2	-4.7	0.2
North West Leicestershire	85.4	80.7	85.9	83.1	78.6	78.9	88.2	86.4	2.8	5.7
East Staffordshire	84.2	78.8	86.2	75.2	88.6	79.5	84.2	77.7	0.0	-1.1
Lichfield	85.7	73.7	86.6	88.1	86.4	79.4	93.7	84.5	8.0	10.8
Newark and Sherwood	85.6	78.1	91.6	73.3	83.2	79.7	78.9	78.9	-6.7	0.8
New Forest	90.7	70.8	88.6	71.4	89.6	72.9	86.2	73.2	-4.5	2.4
East Midlands	84.9	75.3	84.1	76.0	84.1	76.2	84.7	76.6	-0.2	1.3
West Midlands	82.5	70.9	83.0	71.0	82.3	71.9	82.3	71.9	-0.2	1.0
England	83.6	73.0	83.7	73.2	83.4	73.7	83.7	74.0	0.1	1.0
Source: ONS - Annual Population Survey accessed via NOMIS, April 2010										

Table A4.4: Employment rate (male/female)										
	Jul 2005-Jun 2006		Jul 2006-Jun 2007		Jul 2007-Jun 2008		Jul 2008-Jun 2009		change (2005-6 to 2008-9)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
South Derbyshire	82.1	83.4	76.9	75.5	80.7	81.8	83.7	71.1	1.6	-12.3
Charnwood	83.0	78.8	79.3	77.9	88.3	72.2	82.7	72.8	-0.3	-6.0
Hinckley and Bosworth	86.8	76.2	85.4	72.3	81.8	75.0	79.4	76.7	-7.4	0.5
North West Leicestershire	83.3	78.5	82.6	77.8	74.4	72.5	82.6	80.6	-0.7	2.1
East Staffordshire	81.3	75.7	81.5	70.2	86.2	75.2	79.4	73.8	-1.9	-1.9
Lichfield	81.7	71.2	84.1	86.9	82.8	76.2	89.6	79.6	7.9	8.4
Newark and Sherwood	82.2	78.1	88.0	66.9	75.3	72.9	77.9	75.1	-4.3	-3.0
New Forest	86.7	68.9	84.8	65.7	87.5	70.8	79.4	69.4	-7.3	0.5
East Midlands	80.1	72.0	80.1	71.9	79.4	72.0	78.2	71.8	-1.9	-0.2
West Midlands	77.5	67.4	77.7	67.1	76.6	67.7	74.3	66.3	-3.2	-1.1
England	78.8	69.4	78.9	69.5	78.8	69.9	77.2	69.3	-1.6	-0.1
Source: ONS - Annual Population Survey accessed via NOMIS, April 2010										

Table A4.5: % of working age who are employees (male/female)

	Jul 2005-Jun 2006		Jul 2006-Jun 2007		Jul 2007-Jun 2008		Jul 2008-Jun 2009		change (2005-6 to 2008-9)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
South Derbyshire	75.3	75.8	66.5	61.4	70.1	74.4	75.5	66.8	0.2	-9.0
Charnwood	70.9	73.4	66.8	72.8	72.2	67.8	72.7	64.4	1.8	-9.0
Hinckley and Bosworth	67.9	69.9	71.9	67.8	71.3	68.3	70.0	71.0	2.1	1.1
North West Leicestershire	63.7	72.6	66.9	72.8	66.7	69.3	71.0	73.0	7.3	0.4
East Staffordshire	65.9	66.1	69.9	63.4	66.3	70.2	65.4	70.8	-0.5	4.7
Lichfield	68.8	67.3	58.0	81.3	63.4	72.5	59.9	69.6	-8.9	2.3
Newark and Sherwood	52.2	69.2	65.3	57.5	59.6	67.4	67.1	72.2	14.9	3.0
New Forest	72.1	64.0	63.4	60.0	70.4	64.0	69.9	61.0	-2.2	-3.0
East Midlands	66.6	66.6	67.0	66.3	66.6	66.7	66.4	67.4	-0.2	0.8
West Midlands	65.1	62.9	65.3	62.3	63.7	63.5	62.3	62.1	-2.8	-0.8
England	65.0	63.9	65.0	63.9	64.9	64.2	63.9	63.5	-1.1	-0.4

Source: ONS - Annual Population Survey accessed via NOMIS, April 2010

Table A4.6: % of working age who are self employed (male/female)

	Jul 2005-Jun 2006		Jul 2006-Jun 2007		Jul 2007-Jun 2008		Jul 2008-Jun 2009		change (2005-6 to 2008-9)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
South Derbyshire	*	*	*	*	*	*	*	*	n/a	n/a
Charnwood	12.1	*	12.5	*	16.2	*	9.4	8.4	-2.7	n/a
Hinckley and Bosworth	18.9	*	13.5	*	10.5	*	*	*	n/a	n/a
North West Leicestershire	18.5	*	13.6	*	*	*	10.5	*	-8.0	n/a
East Staffordshire	13.4	*	11.6	*	19.0	*	14.0	*	0.6	n/a
Lichfield	12.9	*	24.6	*	19.4	*	29.7	*	16.8	n/a
Newark and Sherwood	30.0	8.9	20.8	8.2	13.2	*	10.8	!	-19.2	n/a
New Forest	14.6		20.5	*	17.1	6.7	9.4	7.7	-5.2	7.7
East Midlands	13.3	5.0	12.6	5.1	12.4	4.8	11.4	4.0	-1.9	-1.0
West Midlands	11.9	4.1	12.0	4.3	12.5	3.9	11.6	4.0	-0.3	-0.1
England	13.4	5.1	13.5	5.2	13.5	5.3	12.9	5.3	-0.5	0.2

Source: ONS - Annual Population Survey accessed via NOMIS, April 2010
***** Estimate and confidence interval unreliable since the group sample size is small
! Estimate and confidence interval not available since the group sample size is zero or disclosive

Table A4.7: Occupational Profile (2008/9 - % of working age people in employment)											
	South Derbyshire	Charnwood	Hinckley and Bosworth	North West Leicestershire	East Staffordshire	Lichfield	Newark and Sherwood	New Forest	East Midlands	West Midlands	England
1: managers and senior officials	16.7	16.9	18.5	16.6	18.0	16.9	14.1	18.3	16.0	14.7	16.0
2: professional occupations	13.1	13.7	11.5	8.9	11.6	16.6	7.6	14.3	11.6	12.9	13.4
3: associate prof & tech occupations	13.7	11.1	13.3	9.5	8.8	13.6	9.2	10.3	12.4	12.7	14.8
4: administrative and secretarial occupations	6.6	12.1	8.5	10.8	9.8	10.3	12.4	12.5	10.5	11.0	11.3
5: skilled trades occupations	16.5	11.2	9.5	12.2	8.5	14.7	13.4	8.8	11.5	11.3	10.4
6: personal service occupations	6.1	8.2	15.2	11.7	8.9	6.7	10.3	9.4	8.8	8.6	8.3
7: sales and customer service occupations	8.7	5.9	8.4	*	5.8	*	8.1	5.8	7.5	7.3	7.4
8: process, plant and machine operatives	11.5	9.6	7.2	10.3	12.0	7.5	9.0	6.7	8.7	8.6	6.8
9: elementary occupations	7.1	11.3	7.8	14.2	16.7	8.6	16.0	13.3	12.9	12.6	11.2

Source: ONS - Annual Population Survey accessed via NOMIS, April 2010
* Estimate and confidence interval unreliable since the group sample size is small (3-9).

Table A4.8: Local Jobs by Sector (2001 – 2008)

Area	Year	A	D	F	F	H	I	J	K	L	M	N	O	Total
South Derbyshire	2001	274	14,455	2,782	9,157	2,556	2,329	941	6,430	2,635	6,629	3,526	2,619	**54,624**
	2008	395	10,563	3,498	11,804	3,208	1,831	746	9,801	1,728	9,445	4,539	3,207	**61,487**
	Change	121	-3,892	716	2,647	652	-498	-195	3,371	-907	2,816	1,013	588	**6,863**
Charnwood	2001	372	11,998	1,579	6,793	2,287	1,397	670	4,179	1,329	1,800	2,234	2,913	**38,575**
	2008	388	8,119	1,679	6,715	2,886	2,474	776	5,229	732	3,021	3,061	2,201	**38,465**
	Change	16	-3,879	100	-78	599	1,077	106	1,050	-597	1,221	827	-712	**-110**
Hinckley and Bosworth	2001	446	9,784	3,420	6,177	3,485	6,228	1,101	4,855	1,478	1,739	1,711	1,336	**42,542**
	2008	493	8,240	3,337	7,879	3,039	8,475	639	8,703	975	3,114	3,004	1,675	**50,458**
	Change	47	-1,544	-83	1,702	-446	2,247	-462	3,848	-503	1,375	1,293	339	**7,916**
North West Leicestershire	2001	636	4,155	1,915	2,898	1,695	1,315	876	2,224	434	2,266	1,977	916	**21,511**
	2008	502	7,684	1,952	3,691	1,892	1,711	148	3,577	#	2,969	2,608	1,103	**28,347**
	Change	-134	3,529	37	793	197	396	-728	1,353	#	703	631	187	**6,836**
East Staffordshire	2001	418	12,248	2,123	10,150	3,716	2,406	752	6,244	1,506	4,973	5,479	1,577	**51,695**
	2008	490	11,509	2,356	9,590	2,987	3,454	718	9,041	1,592	4,052	6,969	2,202	**54,996**
	Change	72	-739	233	-560	-729	1,048	-34	2,797	86	-921	1,490	625	**3,301**
Lichfield	2001	373	8,231	1,916	6,787	3,114	1,738	870	4,325	1,120	2,942	4,585	1,819	**38,115**
	2008	713	5,099	2,257	6,201	2,735	2,871	663	7,528	1,414	3,392	4,295	2,488	**39,992**
	Change	340	-3,132	341	-586	-379	1,133	-207	3,203	294	450	-290	669	**1,877**

Source: ABI accessed via NOMIS, May 2010, Crown Copyright, # Data suppressed

Key:

- A : Agriculture, hunting and forestry
- D : Manufacturing
- F : Construction
- G : Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
- H : Hotels and restaurants
- I : Transport, storage and communication
- J : Financial intermediation
- K : Real estate, renting and business activities
- L : Public administration and defence; compulsory social security
- M : Education
- N : Health and social work
- O : Other community, social and personal service activities