Evidence to Support the Economic Growth Strategy 2022-2027

Shropshire in Context

Evidence Relating to:

- Shropshire's location and key towns and settlements
- Demography, including population growth, age breakdowns and working age population
- Dependency Ratio
- Migration
- Population Projections

Introduction to Shropshire

Shropshire is in the centre of the country in the North West Midlands and shares a border with Wales to the west. There are good transport links to the West Midlands conurbation via the M54 motorway and a regular train service with a direct line to London. The main trunk roads through Shropshire are the A49 and the A5. Shropshire is the second largest inland local authority area behind Wiltshire.

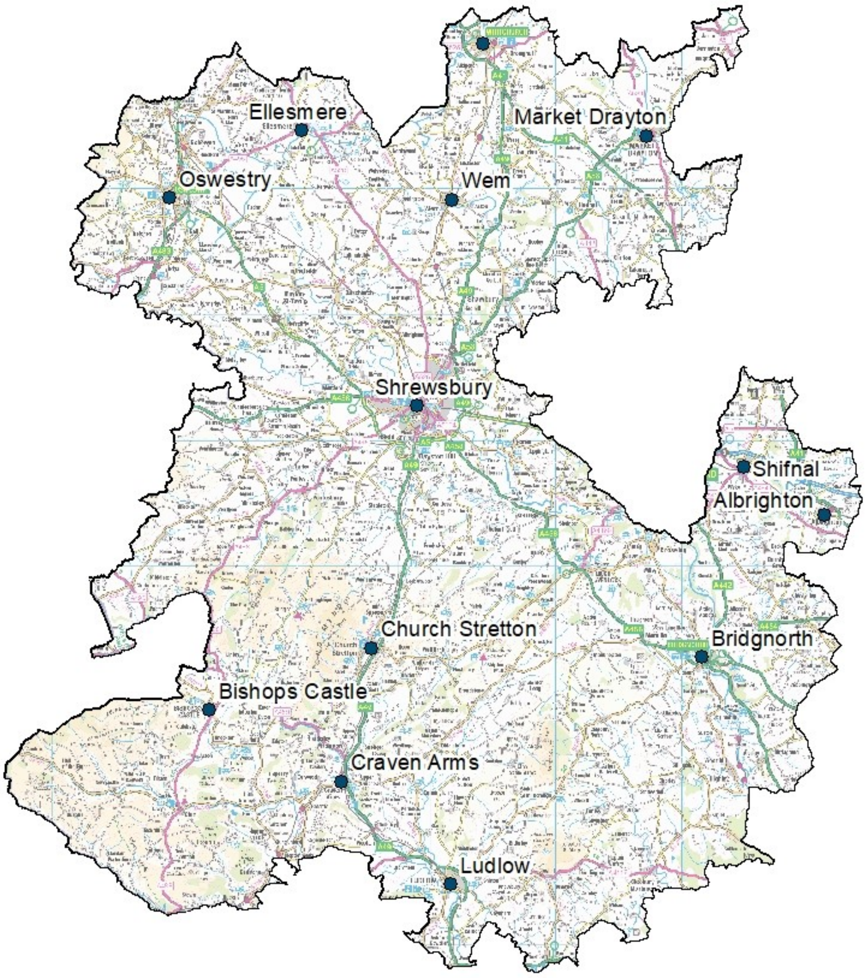
It has a population of 325,400 (2020 mid-year estimates) and is sparsely populated, with just over one person per hectare (4.3 persons per hectare in England). 97.5% of Shropshire's land mass is rural – the 2.5% of land mass that is classified as urban accommodates 42.8% of the population.[1]

Location of Shropshire

Shropshire has vibrant market towns, the largest being Shrewsbury, followed by the main centres of Oswestry, Whitchurch and Market Drayton in the north and Bridgnorth and Ludlow to the south of the county.

[1] Rural Urban Classification

Map of Shropshire



Population of Shropshire's Key Towns, 2020

Shrewsbury	77,100	Broseley	5,700
Oswestry	18,200	Albrighton	5,000
Market Drayton	12,500	Ellesmere	4,900
Bridgnorth	12,400	Church Stretton	4,800
Ludlow	11,000	Highley	3,800
Whitchurch	10,600	Cleobury Mortimer	3,600
Shifnal	9,800	Much Wenlock	3,400
Wem	6,300	Craven Arms	3,000
Pontesbury/Minsterley	5,900	Bishop's Castle	1,600

Source: ONS Mid-Year Estimates 2020 © Crown Copyright 2022

At a more local and neighbourhood level for delivery of planning and other services, Shropshire is divided into 18 Place Plan Areas (PPA's). This geography has been created by Shropshire Council and represents market towns, key settlements and their hinterlands.

Shropshire Place Plans

Population of Shropshire's Place Plan Areas, 2020

Shrewsbury	102,600	Ellesmere	9,000
Oswestry	42,600	Church Stretton	8,500
Bridgnorth	24,600	Cleobury Mortimer	8,200
Market Drayton	23,900	Albrighton	7,600
Wem	16,900	Craven Arms	6,600
Ludlow	16,300	Broseley	5,700
Whitchurch	15,600	Pontesbury/Minsterley	5,300
Bishop's Castle	10,800	Much Wenlock	5,000
Shifnal	9,600	Highley	4,300

Source: ONS Mid-Year Estimates 2020 © Crown Copyright 2022

Demographics

Summary

Population Size: 325,400 in 2020

Shropshire has 47,540 millennials (ages 25-39). The national average for an area this size is 59,951.

Retirement risk is high in Shropshire. The national average for an area this size is 113,126 people 55 or older, while there are 148,392 here.

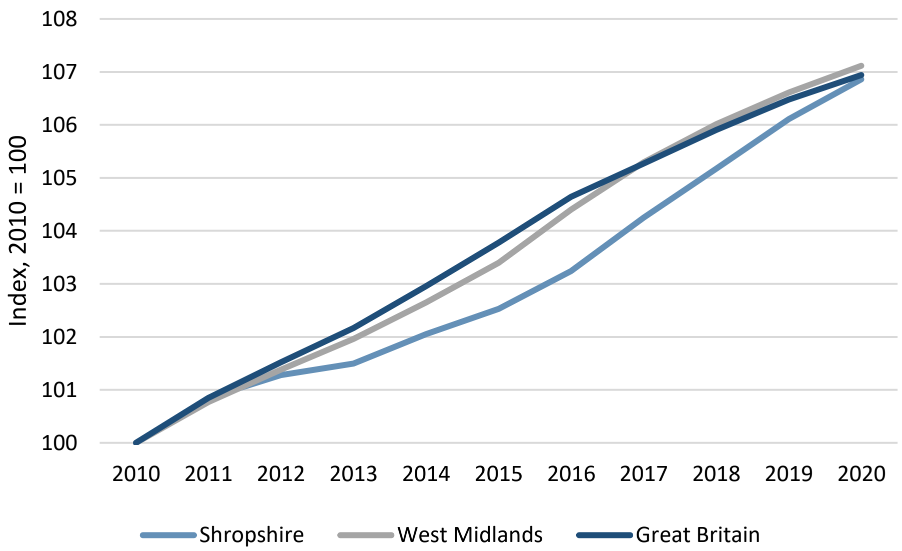
Racial diversity is low in Shropshire. The national average for an area this size is 46,749 racially diverse people, while there are 6,936 here.

Source: EMSI, 2022 based on ONS Mid-Year Estimates 2020

Population Growth

Shropshire's population grew by 6.9% between 2010 and 2020 to 325,400. This is the equivalent of an additional 20,900 people. As show in the chart below, population growth in Shropshire has been like growth nationally (+6.9%) and regionally (+7.1%).

Population Growth, 2010-2020



Source: ONS, Mid-Year Estimates 2020 © Crown Copyright 2022

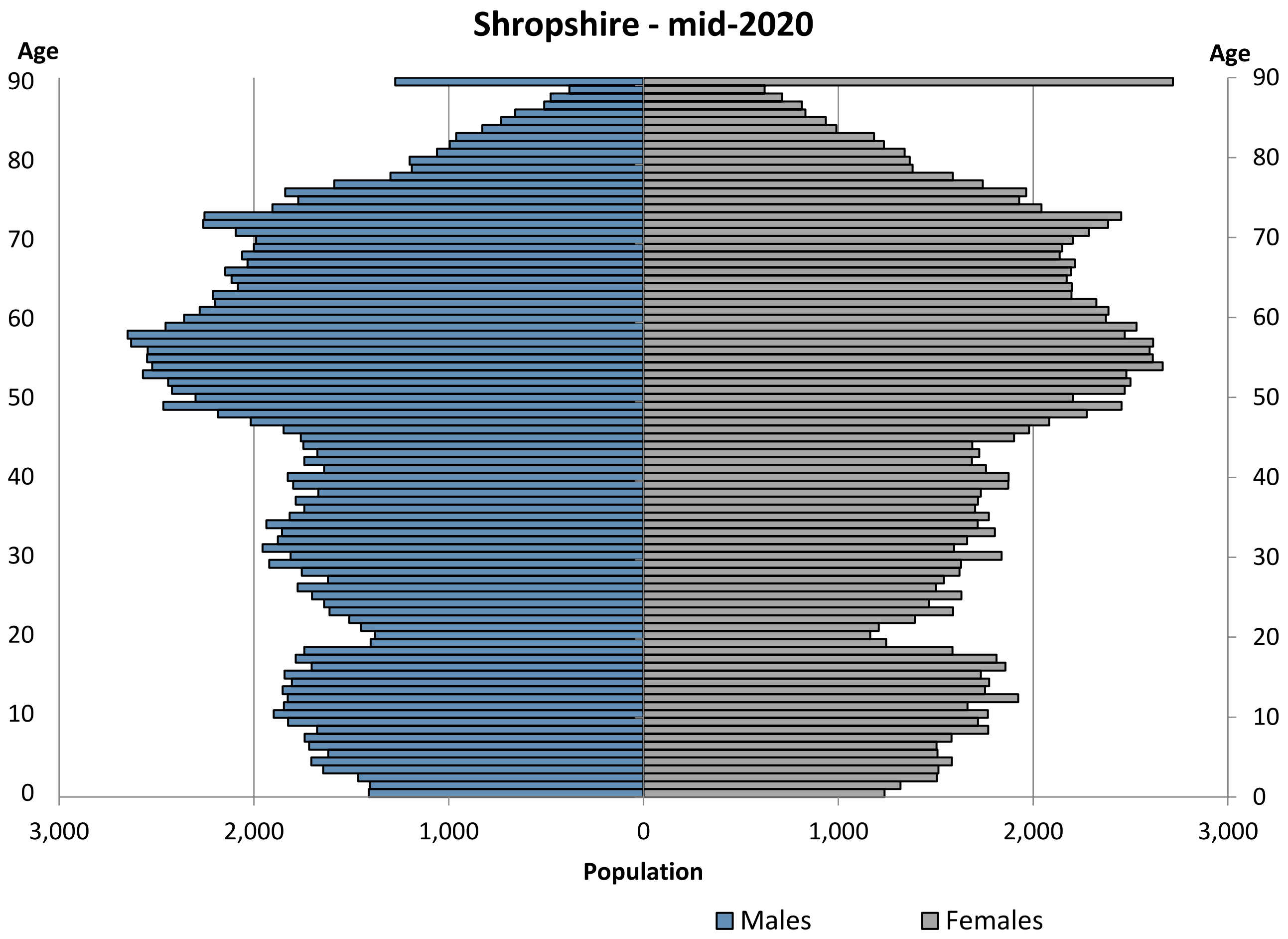
Age Breakdown

The following population pyramid shows the age distribution of the Shropshire population in 2020.

The population is ageing across the country, but this has been particularly acute in Shropshire. Growth in the number of people aged 65 and over has risen more than four times as rapidly as the whole population since 2010 (+30.7%). This is the equivalent of an additional 19,100 people in this age bracket. Over 65s account for over 90% of all population growth over the last 10 years. Consequently, by 2020 25% of the Shropshire population was aged 65 and above compared with 20% in 2010. Nationally, the 65+ age band has grown by 21.8% since 2010 and now accounts for 18.7% of the population.

The median age in Shropshire in 2020 is 48.2 years, compared with 40.5 nationally.

Population Pyramid for Shropshire, 2020

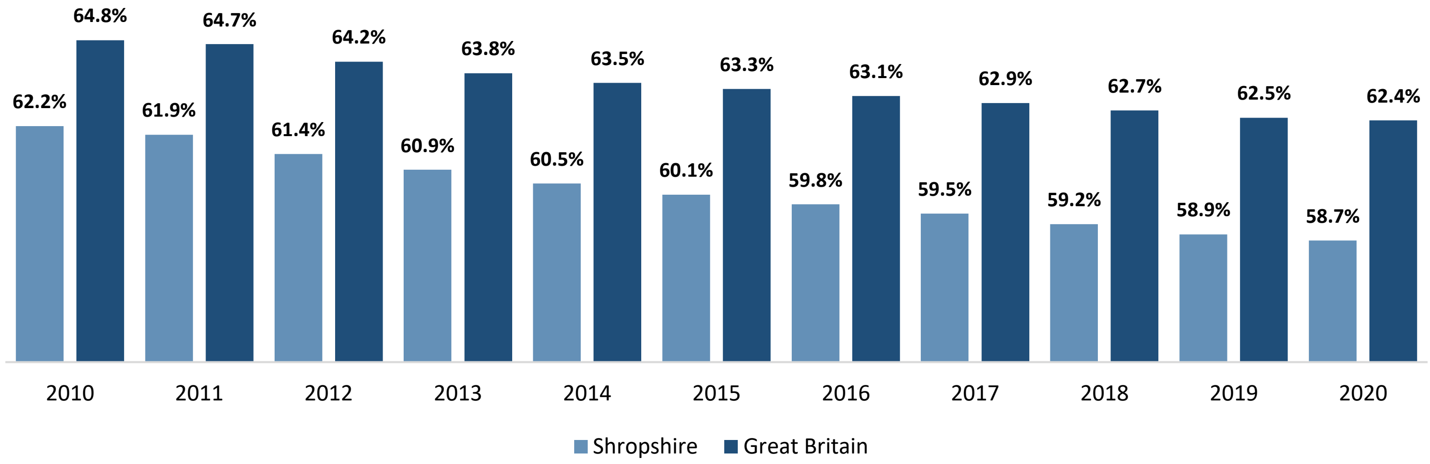


Source: ONS, Mid-Year Estimates 2020 © Crown Copyright 2022

Working Age Population

The shape of the working age population is changing as the state pension age has risen and many people are working longer. However, the proportion of the population which is of traditional working age (16-64) has fallen in each year since 2010, both nationally as well as in Shropshire. By 2020, just 58.7% of the Shropshire population were aged 16-64 compared with 62.2% in 2010. Despite this proportional decline, the absolute number in this age bracket has risen slightly by 1,600 people (+0.9%). Nationally, the working age population accounted for 62.4% of the total in 2020.

Working Age Population as Percentage of the Total Population, 2010-2020



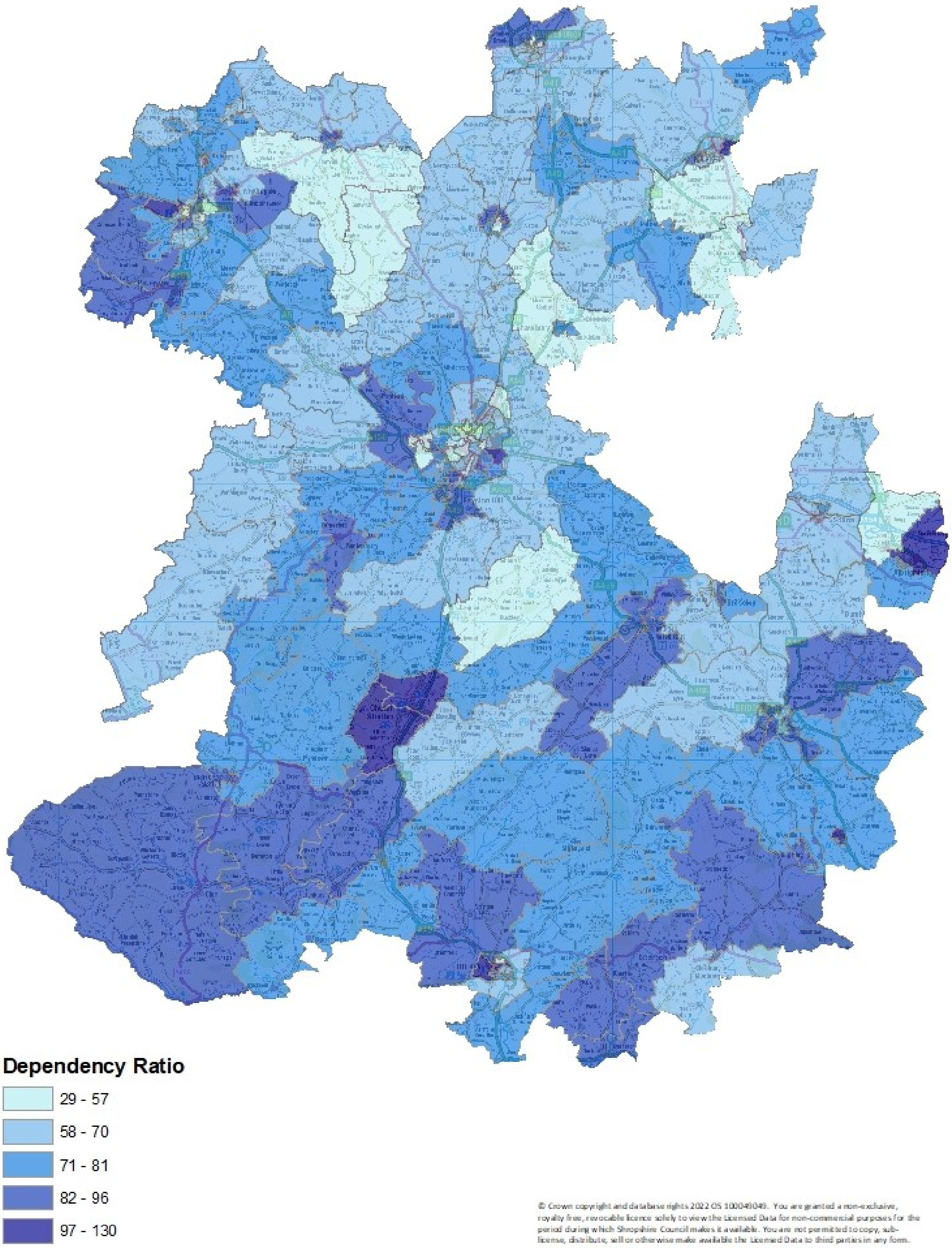
Source: ONS, Mid-Year Estimates 2020 © Crown Copyright 2022

Dependency Ratio

The dependency ratio is a measure of the pressure on the productive working age population (particularly financial) in terms of supporting the needs of the non-productive dependent population. It should be noted that not all people of working age are productive and conversely, not all people aged 0-15 or 65+ are unproductive. At mid-2020, Shropshire had a dependency ration of 70:100 compared with 60:100 nationally. The ratio in Shropshire has risen from 61:100 in 2010, while in Great Britain it has risen from 54:100.

The following map shows the dependency ratio across Shropshire calculated at lower level super output area (LSOA). It shows that the dependency ratio is particularly high in rural parts of the county, especially in the south west.

Dependency Ratio, 2020



Source: ONS Mid-Year Population estimates 2020, © Crown Copyright 2022

Population Projections

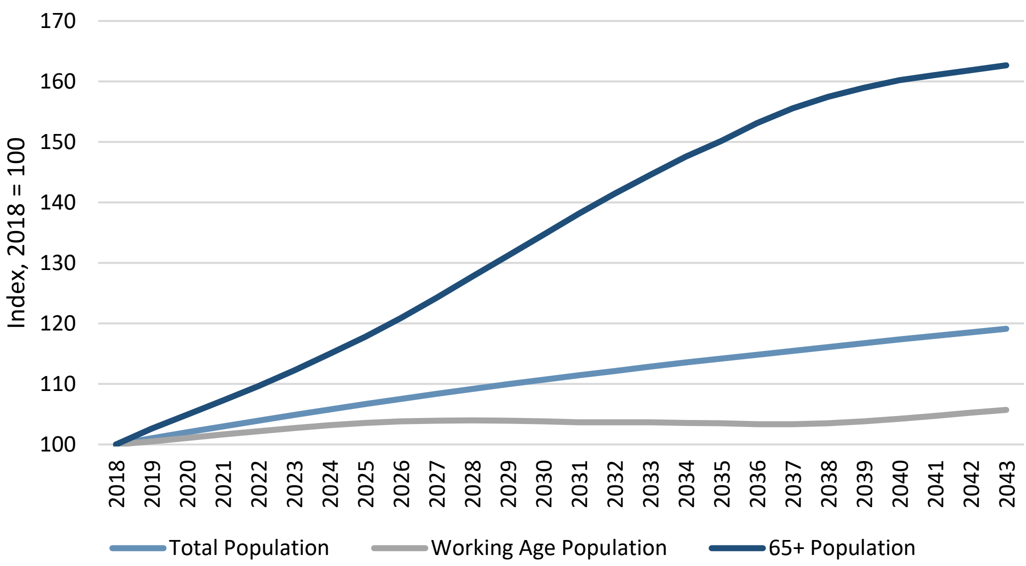
The total population in Shropshire is projected to rise by 19.1% between 2018 and 2043 according to the ONS 2018 based sub-national population projections. This growth compares with national growth of 10.3% and will take the population to 381,400.

Growth in the 16-64 population will be significantly lower, at 5.7% over the same period, such that by 2043, the working age population will account for just 52.5% of the total population.

The 65+ population is projected to increase by 62.7% and by 2043 this age bracket is projected to account for a third of the population.

This means that by 2043, there will be an additional 10,800 people in the 16-64 age bracket and 48,800 more aged 65+. This change will shift the dependency ration up to 90:100.

Shropshire Population Projections, 2018-2043



Source: ONS 2018 Sub-National Population Projections, © Crown Copyright 2022

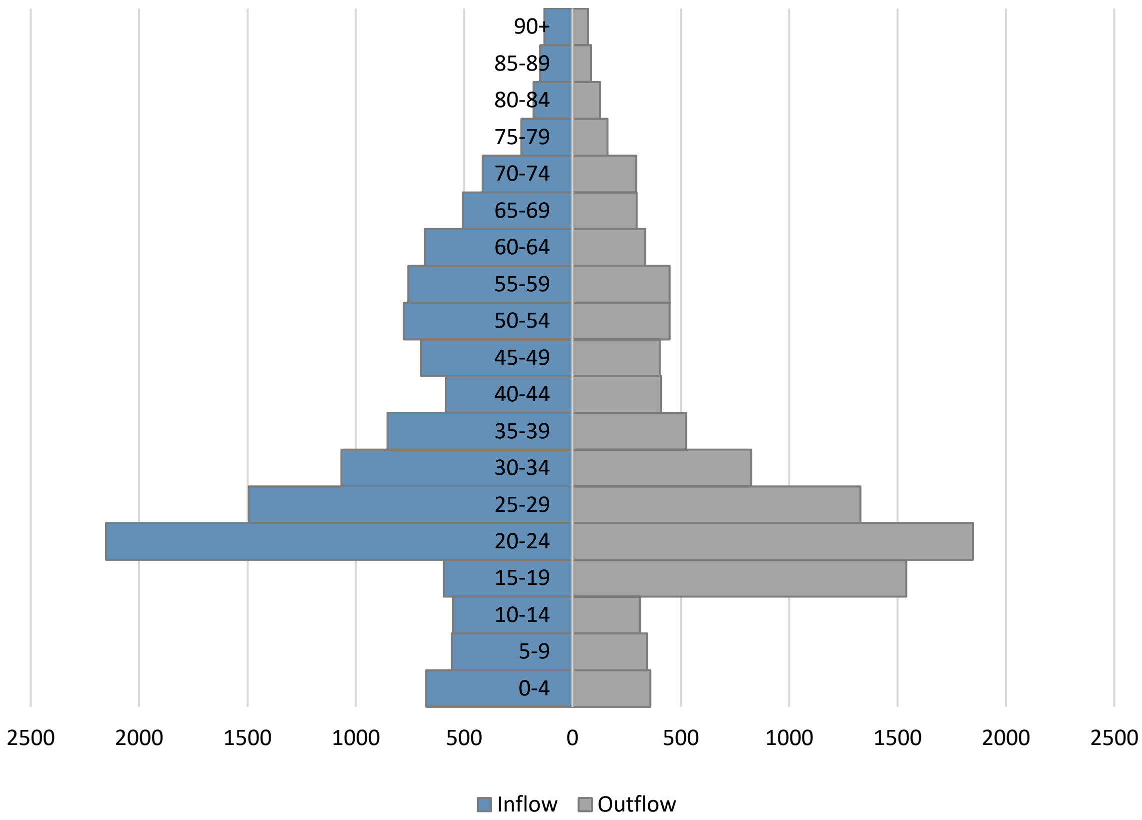
Migration

Between 2016 and 2020, an annual average of 14,000 people moved to Shropshire, while an average of 11,000 moved out, resulting in a net average annual gain of 3,000 people. Shropshire is reliant on internal in-migration for population growth. Net in-migration stood at 15,000 in the five years between 2016 and 2020, while overall population growth was just 11,000. These means that without people moving into the county, the population would be shrinking.

The chart below shows the age structure of in and out migrants in 2020. There is only one group – the 15–19-year-olds- where out-migration exceeds in-migration. This is largely due to school leavers moving to attend university or to pursue opportunities elsewhere. In 2020, approximately 900 young people in this age band were lost.

Those over the age of 65 account for 12.4% of those moving into Shropshire compared with 10.2% of people moving out. Migration patterns therefore contribute to Shropshire's ageing population.

Age Structure of In and Out Migrants, 2020



Source: ONS Internal Migration Statistics by Local Authority 2020, © Crown Copyright 2022

Theme: Supporting Local Businesses

Evidence relating to:

- Business Counts
- Jobs
- Business Start-Ups, Closures and Survival Rates
- Sectors and their Relative Importance
- Employment Projections
- Covid-19 Impact
- GVA and Productivity
- Recruitment & Job Vacancies
- Job Postings
- Chamber of Commerce Quarterly Economic Survey

Businesses and Jobs

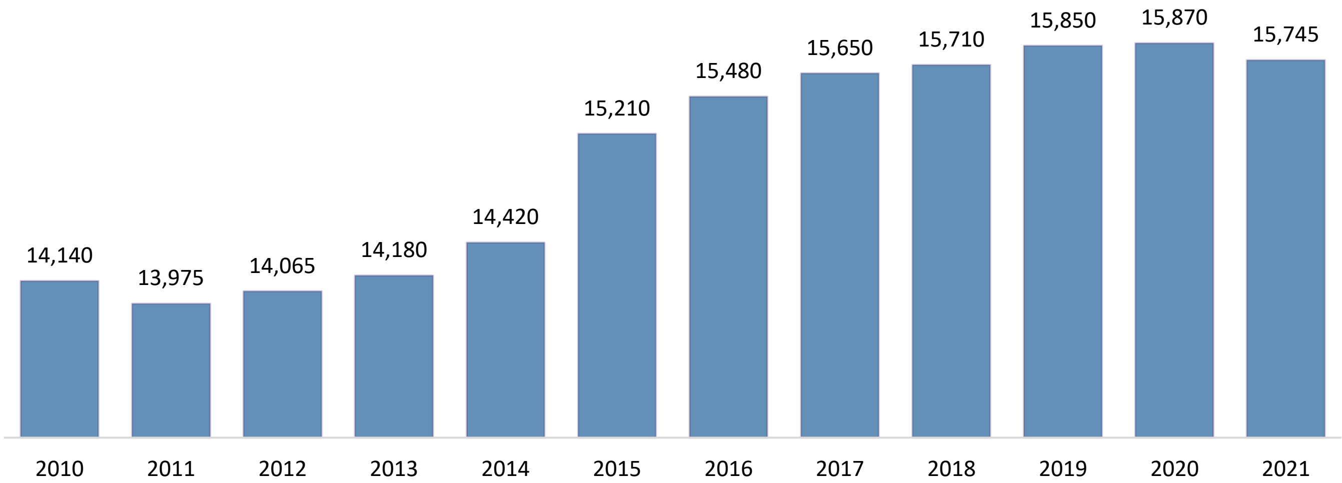
Business Counts

There were 15,745 business enterprises operating in Shropshire in March 2021, which were represented by 17,925 local VAT or PAYE registered units. This is the equivalent of 1.14 units per enterprise. Since 2011, when the number of enterprises dipped by 165 (-1.2%), growth was sustained in each year until 2020, albeit at a relatively slow pace since 2016.

In 2021, the number of enterprises declined by 125 (-0.8%) while the number of local units fell by 100 (-0.6%), reflecting the impact of the Covid-19 pandemic on the local business count. Overall, between 2010 and 2021, the number of business enterprises operating in Shropshire rose by 11.4%, which compares unfavourably with growth of 32.3% nationally and 28% regionally.

It should be noted that Shropshire sole traders who operate below the VAT threshold will be excluded from the figures shown in the chart below.

Number of Business Enterprises in Shropshire, 2010-2021



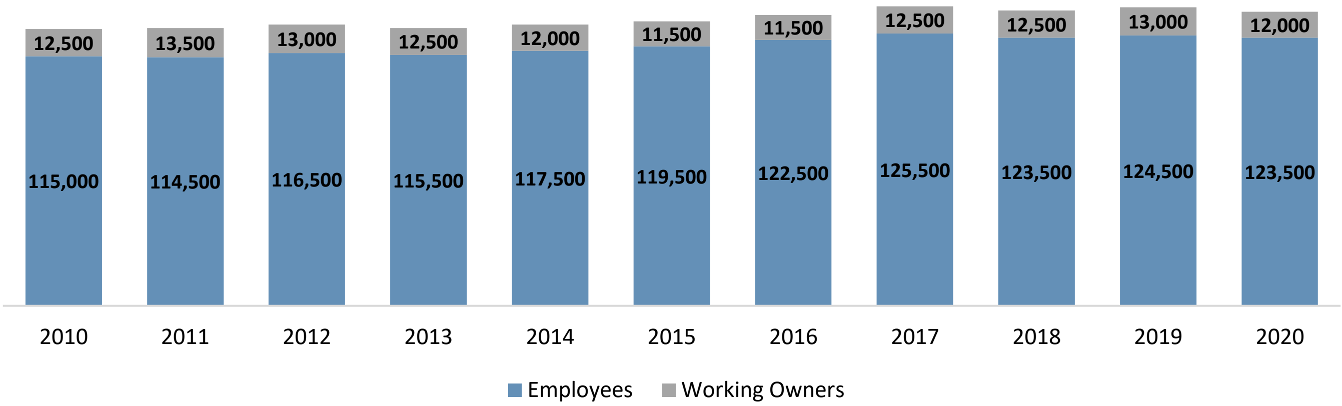
Source: ONS, IDBR 2021, © Crown Copyright 2022

Jobs and Employments

There were 123,500 employee jobs in Shropshire in 2020. While this represents growth of 7.4% since 2010 – the equivalent of 8,500 additional jobs – the number contracted by 1,000 in 2020 (-0.8%) when the economy was impacted by the Covid-19 pandemic. Over the last decade, growth in the number of jobs has risen more slowly than in the West Midlands (+10.9%) or Great Britain (+11.0%).

In additional to employee jobs, there are an additional 12,000 working owners in Shropshire, which includes the self-employed (if they are registered for VAT or PAYE). This means that there are 135,500 employments, of which employee jobs represent 91.1% of the total. Compared with the West Midlands and Great Britain, this proportion is low (97% in the West Midlands and 96.6% in Great Britain) which reflects the high number of sole traders in Shropshire.

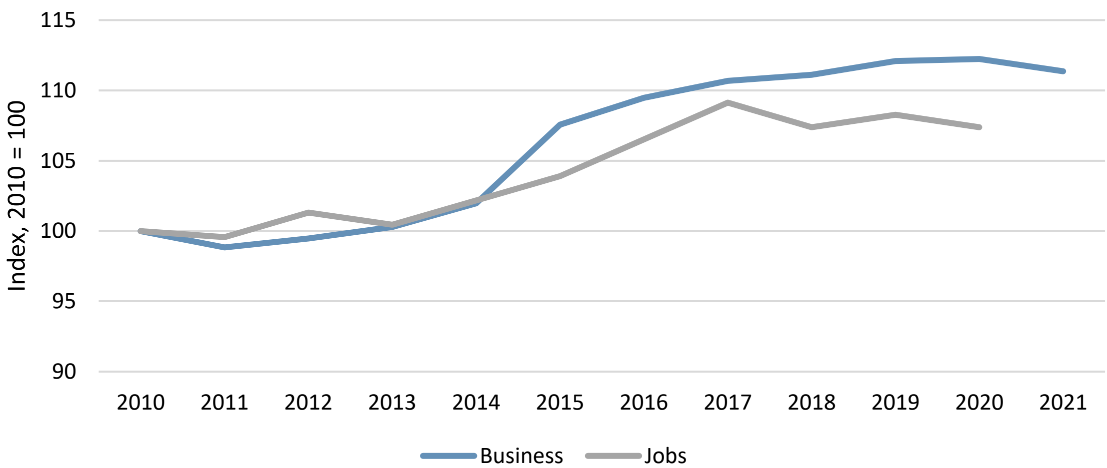
Number of Employees and Working Owners, 2010-2020



Source: ONS, Business Register of Employment Survey (BRES) 2020, © Crown Copyright 2022

The chart below shows that the number of businesses operating in Shropshire has grown more rapidly than the number of jobs since 2010. As a result, the average number of jobs per business has declined.

Growth in the Number of Jobs and Businesses



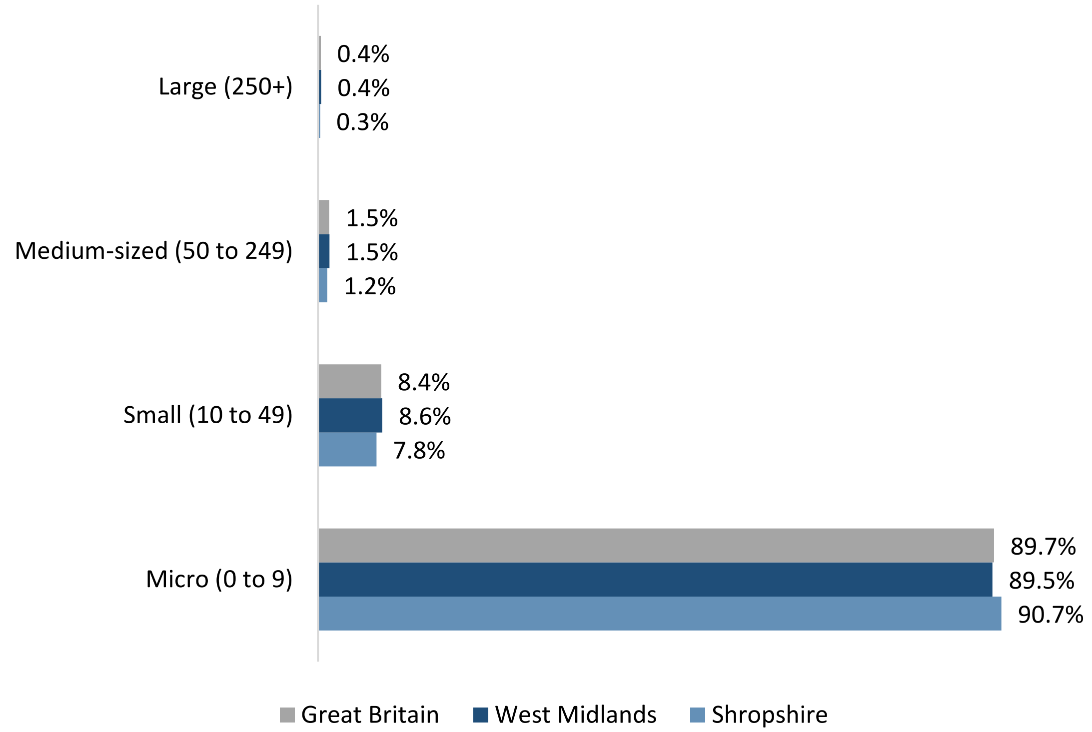
Source: ONS, Business Register of Employment Survey (BRES) 2020, IDBR, 2021, © Crown Copyright 2022

Business Size

The majority of businesses in Shropshire are classified as micro (0-9 employees), with more than three-quarters having four or fewer employees. There are only 45 non-SME enterprises operating within the County (with 250 or more employees), although this number has risen from 40 in 2020 and from 25 in 2010. There are 195 enterprises with between 50 and 249 employees, 1,225 with 10 to 49 employees, leaving 14,280 with a workforce of less than 10.

Large and medium sized enterprises account for 1.9% of all enterprises in the West Midlands and in Great Britain compared with 1.5% in Shropshire.

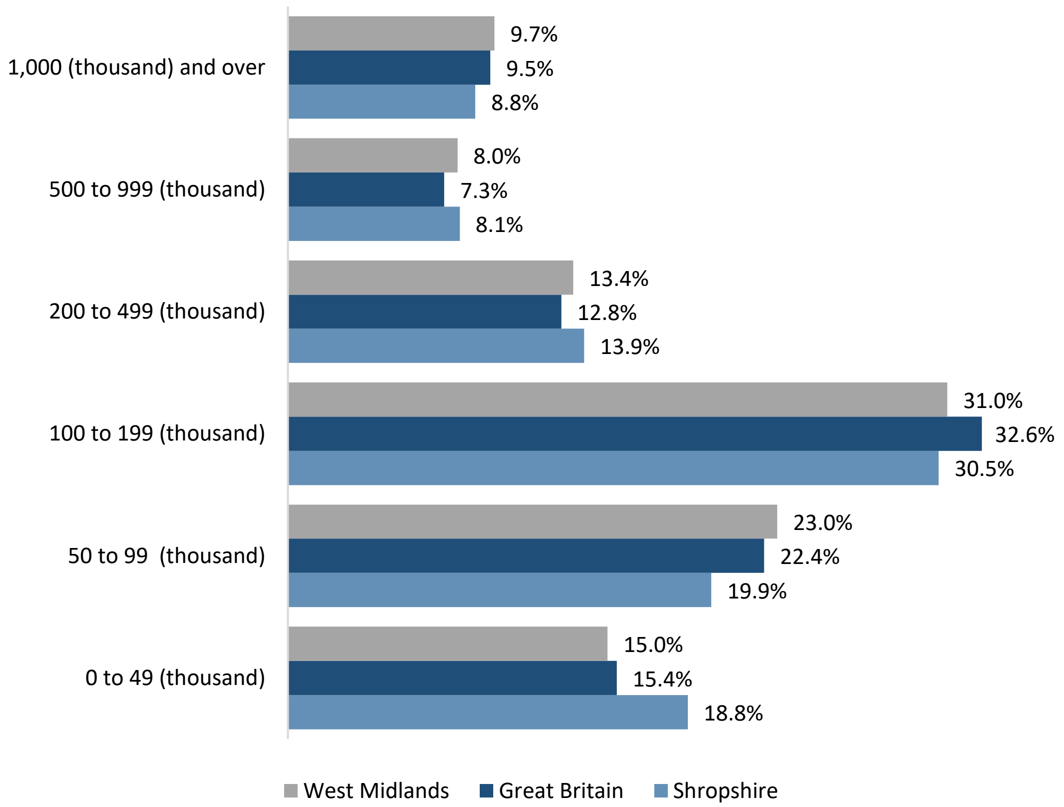
Breakdown of Enterprises by Size, 2021



Source: ONS, IDBR 2021, © Crown Copyright 2022

18.8% of Shropshire enterprises generate turnover of less than £49,000 per annum, which is notably below the VAT threshold. Around half generate a turnover of between £50,000 and £199,000. 8.8% command a turnover of more than £1 million.

Breakdown of Businesses by Turnover, 2021



Source: ONS, IDBR 2021, © Crown Copyright 2022

Business Start-Ups and Closures

Compared with national and regional averages, Shropshire supports a low business start-up rate. This is, however, influenced by the already high levels of self-employment that prevails across the County and compounded by the fact that home-based and micro businesses which are not registered for either VAT or PAYE are excluded from the official data. In addition, the low start-up rate is counterbalanced by a lower-than-average closure rate. Shropshire therefore has a low business churn rate.

1,180 new businesses were established in Shropshire in 2020. With fewer businesses closing this year (1,090), the active business base has increased to 13,745. As a percentage of the total number of active businesses the start-up rate in Shropshire is 8.6% - notably lower than the 12.2% achieved regionally and the 12.0% achieved nationally. However, business closure rates are also lower than national and regional averages, at 7.9% in 2020 compared with 11.9% in the West Midlands and 10.6% in Great Britain. In Shropshire, 18 fewer businesses were set up per 10,000 of the population compared with the national average in 2020, while the number of closures per 10,000 of the population was 15 lower. There were 422 active businesses in Shropshire per 10,000 population in 2020 which is slightly higher than the regional average, but lower than the national average.

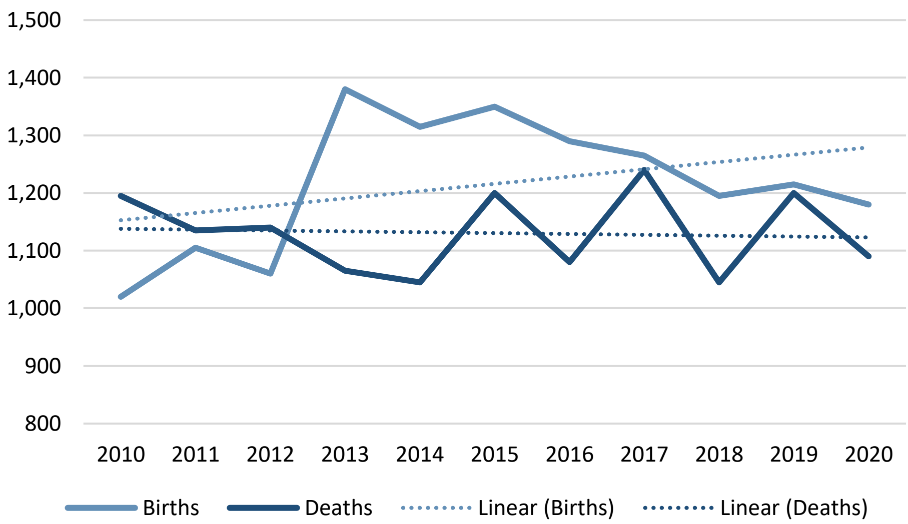
Business Start-Ups and Closures, 2020

	Shropshire	West Midlands	Great Britain
Start-Ups	1,180	19,660	351,350
Closures	1,090	28,795	311,410
Active Businesses	13,745	242,820	2,938,870
Start-Ups as % Active Businesses	8.6%	12.2%	12.0%
Closures as % Active Businesses	7.9%	11.9%	10.6%
Start-Ups per 10,000 population	36	50	54
Closures per 10,000 population	33	48	48
Active Businesses per 10,000 population	422	407	451

Source: ONS, Busines Demography 2020, © Crown Copyright, 2022
Note: Includes businesses registered for either VAT or PAYE only. Data not directly comparable with business counts collected via the IDBR survey

The chart below shows trends in the number of businesses starting and closing in Shropshire in the decade leading up to 2020. At the start of the period, in the aftermath of the recession, more businesses were closing than opening. By 2013, this situation had reversed and there have been a higher number of births than deaths each year ever since. The linear trend lines in the chart below show that over the decade, the number of business starts is on a slight upward trajectory, (albeit downwards since 2015) while the reverse is true for the number of business deaths.

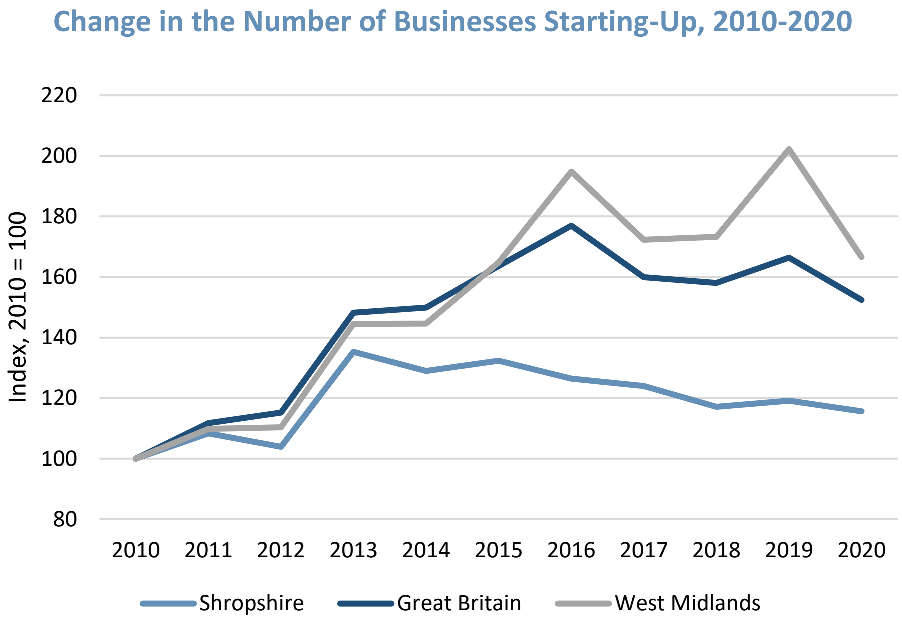
Growth in Business Start-Ups and Closures, 2010-2020



Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

Start-Ups

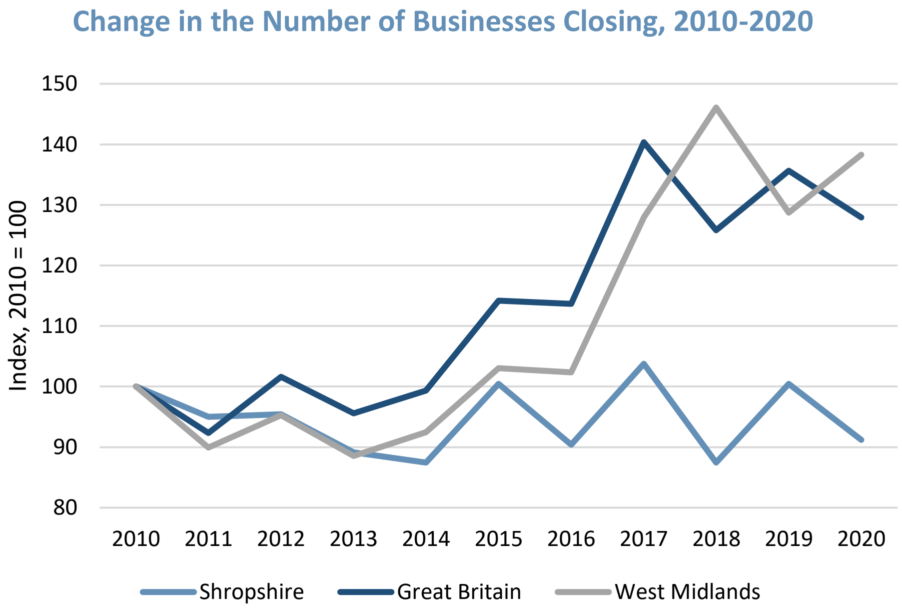
The number of businesses starting up in Shropshire has grown noticeably slower than either regionally or nationally over the last decade, with an increase of 15.7% compared with 66.6% in the West Midlands and 52.4% in Great Britain.



Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

Business Deaths

As shown in the chart above, the linear trend in business closures over the last decade has been slightly downward in Shropshire despite considerable annual fluctuations. The chart below shows how this trend compares with the West Midlands and Great Britain. In 2020, there were 8.8% fewer businesses that ceased trading compared to 2010 in Shropshire. In stark contrast, there has been a notable increase in closures in both the West Midlands (+38.3%) and Great Britain (+27.9%).



Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

Business Survival Rates

Of all businesses which were established in Shropshire in 2015, the majority were still operating a year later (92.6%). By the end of year three, less than two-thirds were still trading, and after five years more than half had ceased operations. Overall, Shropshire businesses which started trading in 2015 showed stronger rates of survival at the one, two-, three-, four- and five-year marks compared with their regional or national counterparts.

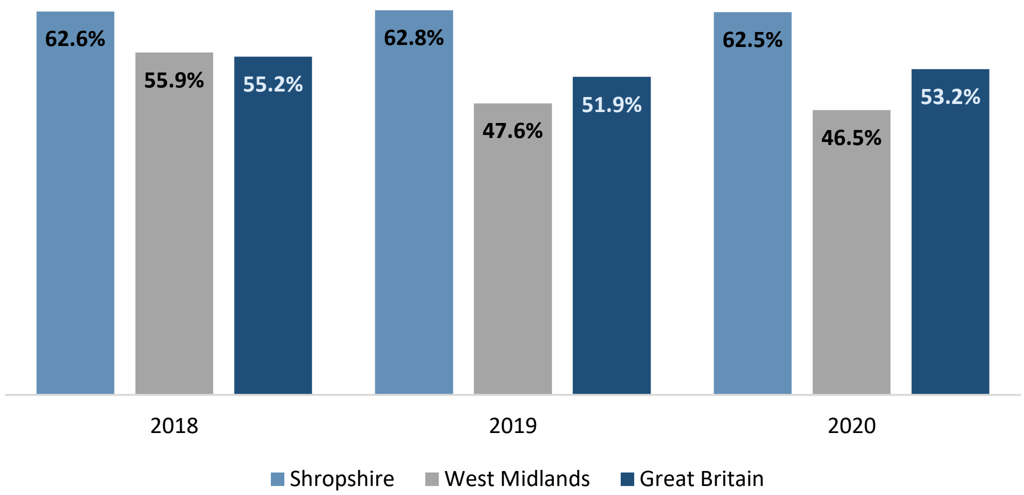
Survival Rates of Businesses Founded in 2015

	% surviving after 1 year	% surviving after 2 years	% surviving after 3 years	% surviving after 4 years	% surviving after 5 years
Shropshire	92.6	76.3	62.6	54.1	47.0
West Midlands	90.9	72.7	55.9	45.2	38.5
Great Britain	89.9	71.4	55.2	45.9	39.5

Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

Looking at three-year survival rates for the last three years (that is for businesses started in 2015, 2016 and 2017) it is clear that Shropshire businesses consistently outperform their regional and national counterparts, with around 63% surviving to the three-year mark for each cohort of businesses.

Three Year Business Survival Rates, 2018-2020



Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

The table below shows the number of new businesses closing in Shropshire in each year. The data suggests that businesses are most vulnerable during their second and third year in operation.

Number of Shropshire Businesses Closing per Year

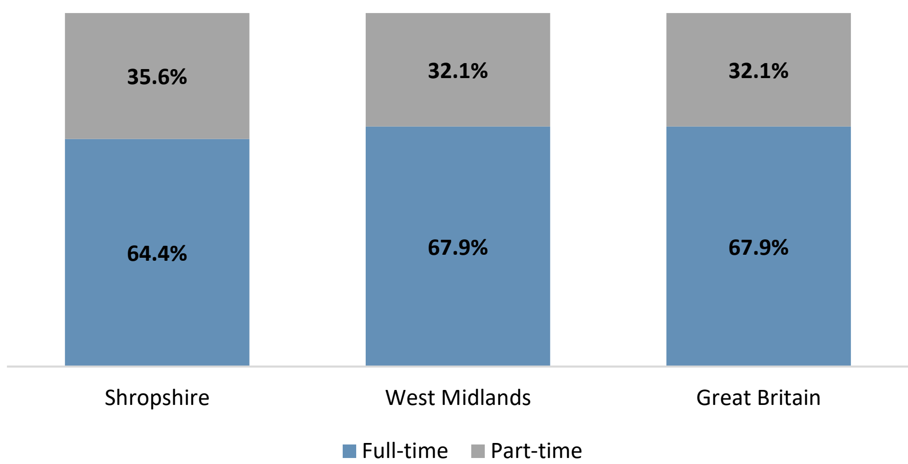
	Number Set Up	Number Closing in year 1	Number Closing in year 2	Number Closing in year 3	Number Closing in year 4	Number Closing in year 5
Businesses set up in 2015	1,350	100	220	185	115	95
Businesses set up in 2016	1,290	100	220	160	105	-
Businesses set up in 2017	1,265	130	175	170	-	-
Businesses set up in 2018	1,195	110	160	-	-	-
Businesses set up in 2019	1,215	105	-	-	-	-

Source: ONS, Busines Demography 2020, © Crown Copyright, 2022

Employment Status

Shropshire supports a higher penetration of part-time employment than is the case regionally or nationally as shown in the chart below. Prevalence of part-time work can be an indicator of under-employment. However, it should be noted that as people approach retirement or pass traditional retirement age but wish/need to carry on working, the tendency to reduce the number of hours worked per week increases.

Breakdown of Employee Jobs by Full-Time and Part-Time, 2020



Source: ONS, Business Register of Employment Survey (BRES) 2020, © Crown Copyright 2022

Sectors

The rural nature of Shropshire's economy is reflected in the breakdown of enterprises and employment by sector. A fifth of all enterprises registered for VAT or PAYE are classified as agricultural. This compares with 4.6% of enterprises nationally. Shropshire is also over-represented by businesses in wholesale, motor trades, accommodation and food services and public administration, but only slightly.

In contrast, Shropshire has comparatively fewer information and communication, finance and insurance, professional, scientific, and technical and business administration and support businesses.

Breakdown of Business Enterprises by Sector, 2021

	Shropshire	West Midlands	Great Britain
Agriculture, forestry & fishing	20.0%	5.3%	4.6%
Mining, quarrying & utilities	0.5%	0.5%	0.5%
Manufacturing	5.3%	6.7%	5.0%
Construction	11.7%	12.2%	13.0%
Motor trades	3.5%	3.6%	2.8%
Wholesale	4.1%	4.5%	3.9%
Retail	6.2%	8.1%	8.0%
Transport & storage (inc postal)	2.9%	7.2%	5.0%
Accommodation & food services	6.3%	5.9%	6.1%
Information & communication	4.1%	5.6%	7.8%
Financial & insurance	1.4%	1.6%	2.2%
Property	3.5%	3.7%	3.8%
Professional, scientific & technical	13.0%	13.8%	16.6%
Business administration & support services	6.8%	9.4%	8.5%
Public administration & defence	0.7%	0.3%	0.3%
Education	1.3%	1.7%	1.7%
Health	3.2%	4.1%	3.8%
Arts, entertainment, recreation & other services	5.5%	5.8%	6.4%
Total	100.0%	100.0%	100.0%

Source: ONS, IDBR 2021, © Crown Copyright 2022

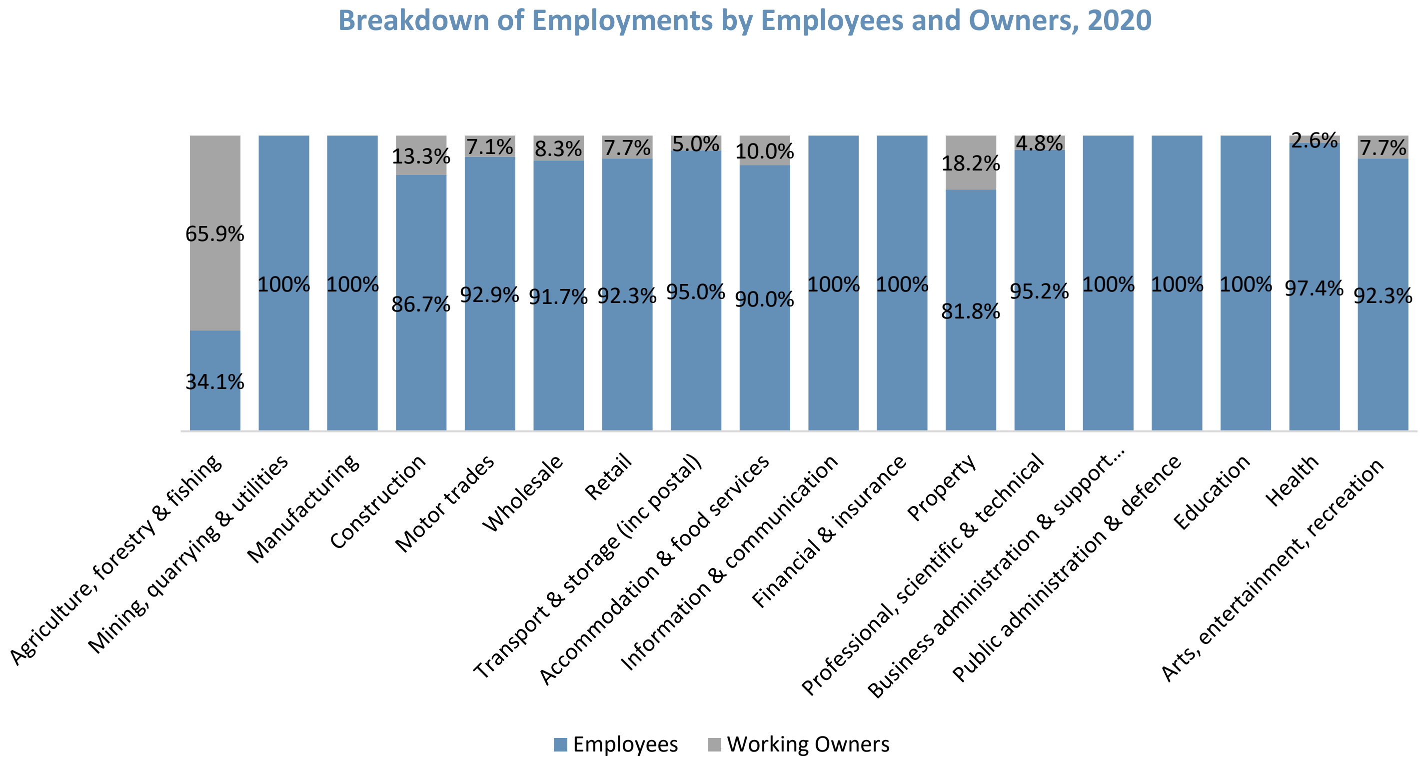
The top five broad employment sectors in Shropshire are health, retail, manufacturing, agriculture and education, with these together representing just under half of all employment.

Breakdown of Business Employments by Sector, 2020

	Shropshire	West Midlands	Great Britain
Agriculture, forestry & fishing	8.1%	1.8%	1.6%
Mining, quarrying & utilities	1.2%	1.2%	1.3%
Manufacturing	8.5%	10.6%	7.7%
Construction	5.5%	4.5%	4.9%
Motor trades	2.6%	2.3%	1.8%
Wholesale	4.4%	4.7%	3.7%
Retail	9.6%	9.0%	9.3%
Transport & storage (inc postal)	3.7%	6.0%	5.0%
Accommodation & food services	7.4%	6.1%	7.1%
Information & communication	2.0%	2.8%	4.3%
Financial & insurance	1.1%	2.4%	3.4%
Property	2.0%	1.7%	1.9%
Professional, scientific & technical	7.7%	7.0%	8.8%
Business administration & support services	5.5%	9.5%	8.6%
Public administration & defence	7.7%	3.7%	4.4%
Education	8.1%	8.8%	8.6%
Health	14.4%	13.4%	13.2%
Arts, entertainment, recreation & other services	4.8%	4.5%	4.3%
Total	100.0%	100.0%	100.0%

Source: ONS, IDBR 2021, © Crown Copyright 2022

Most sectors are made up mainly of employees, but there are sectors where working proprietors or sole traders make up a significant proportion of all employment. One in six of all working owners/sole traders are in the agricultural sector, and they represent almost two-thirds of all employment in the agriculture industry. Other sectors where the representation of sole traders is high are construction, accommodation and food services and property.

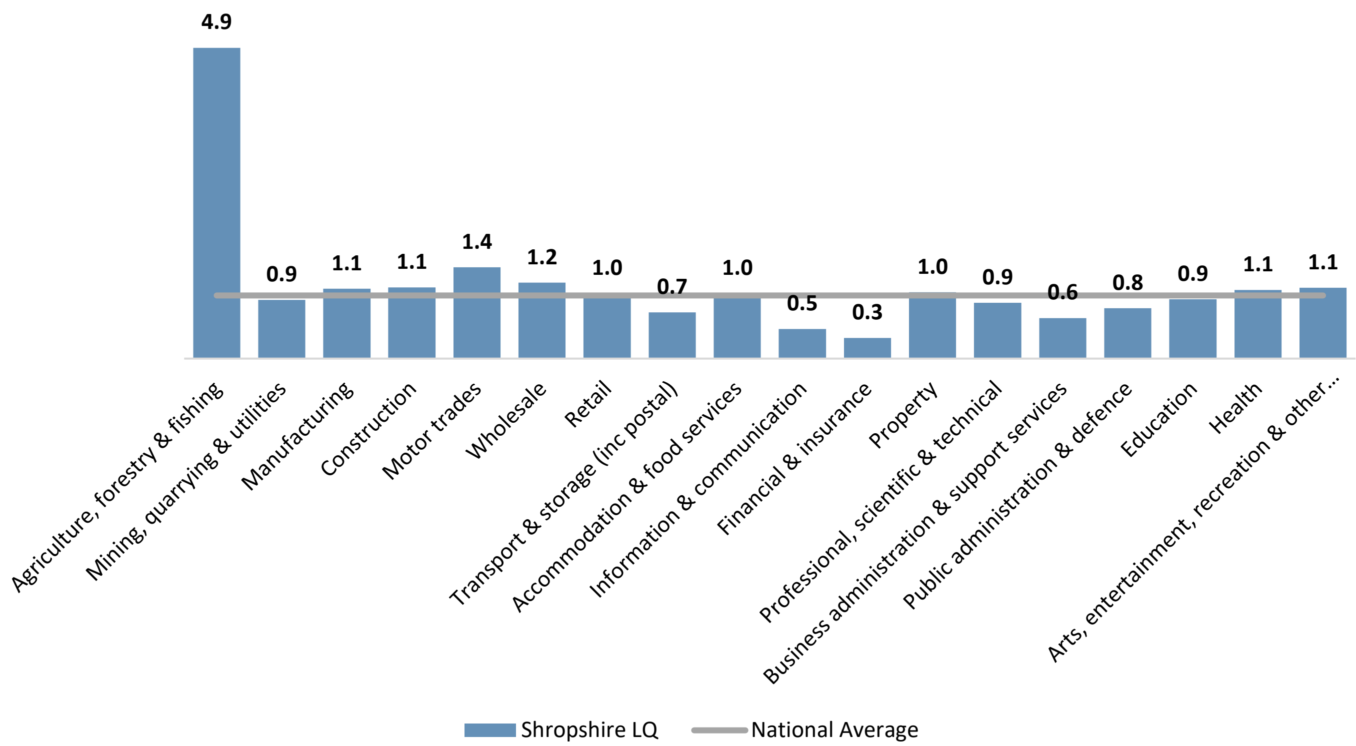


Source: ONS, Business Register of Employment Survey (BRES) 2020, © Crown Copyright 2022

The chart below shows the relative importance of each sector according to a location quotient (LQ). A LQ of 1 shows that the sector has the same comparative importance in Shropshire in terms of employment as it does nationally. Any sector which shows an LQ of over 1 is over-represented in Shropshire while conversely, sectors with an LQ of below 1 are under-represented.

The dependence on the land-based sector is clear, with an LQ of 4.9. Manufacturing, construction, motor trades, wholesale, health and arts and recreation are also over-represented, but for these sectors, employment levels are more closely aligned with national averages. The sectors which are the most significantly under-represented are finance and insurance, information and communication and business administration and support services.

Sector Significance by Location Quotient, 2020



Source: ONS, Business Register of Employment Survey (BRES) 2020, © Crown Copyright 2022

The table below shows the average size of businesses in each sector by considering how many enterprises are operating and the employment levels that are associated with these enterprises. It is evident that some of the largest employment sectors include some of the County's largest employers. Health, for example, accounts for 14.4% of employment but just 3.2% of enterprises. Similarly, education represents 8.1% of employment but just 1.3% of organisations. These two sectors, along with public administration and defence, have the highest average number of employees per enterprise.

At the other end of the scale, agriculture accounts for 20% of enterprises but just 8.1% of employment; professional, scientific and technical accounts for 13% of enterprises and 7.7% of employment, while construction accounts for 11.7% of enterprises but just 5.5% of employment.

Average employment per enterprise across all sectors is 8.6 (the equivalent of 7.8 employees). As well as health, education and public administration and defence, manufacturing, mining, quarrying and utilities, retail, transport and accommodation and food services businesses have an average head count of more than 10.

Average Size of Businesses by Sector, 2020/21

	Employment	Number of Enterprises	Average Employment per Enterprise
Agriculture, forestry & fishing	11,000	3,150	3.5
Mining, quarrying & utilities	1,625	85	19.1
Manufacturing	11,500	830	13.9
Construction	7,500	1,850	4.1
Motor trades	3,500	555	6.3
Wholesale	6,000	650	9.2
Retail	13.000	975	13.3
Transport & storage (inc postal)	5,000	455	11.0
Accommodation & food services	10,000	995	10.1
Information & communication	2,750	640	4.3
Financial & insurance	1,500	225	6.7
Property	2,750	545	5.0
Professional, scientific & technical	10,500	2,040	5.1
Business administration & support services	7,500	1,065	7.0
Public administration & defence	4,750	115	41.3
Education	11,000	205	53.7
Health	19,500	510	38.3
Arts, entertainment, recreation & other services	6,500	860	7.6
Total	135,500	15,745	8.6

Source: ONS, IDBR 2021, ONS BRES 2020 © Crown Copyright 2022

Since 2020, the sectors which have created the most additional employment in Shropshire are:

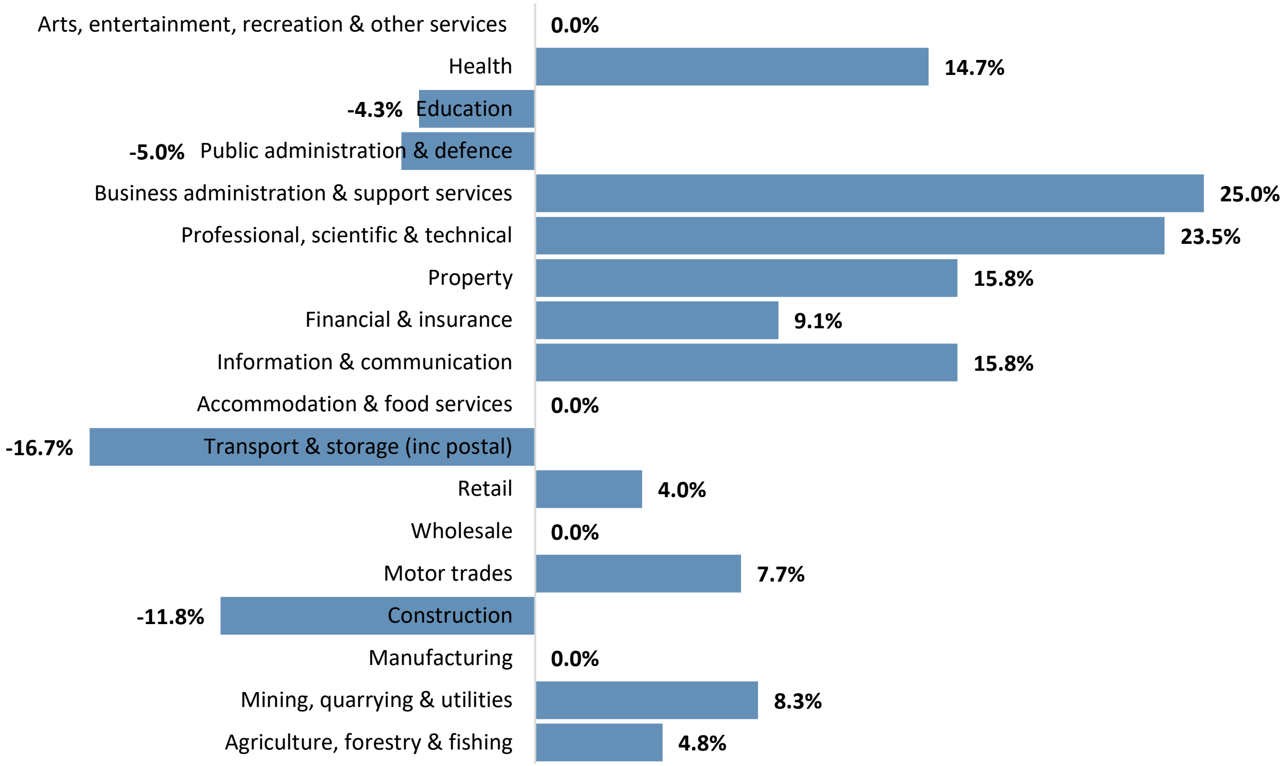
- Health: +2,500 employments
- Professional, scientific and technical: + 2,000 employments
- Business administration and support services: +1,500 employments

Sectors which have contracted include:

- Construction: -1,000 employments
- Transport & Storage: -1,000 employments
- Education: -500 employments
- Public Administration & Defence: -250 employments

The following chart shows the change in employment levels across all broad industrial sectors in Shropshire over the decade to 2020. In percentage terms, the decline in employment has been greatest in transport and storage and construction. Highest growth has been in professional, scientific and technical and business administration and support.

Change in Employment by Sector between 2010 and 2020



Source: ONS, Business Register of Employment Survey (BRES) 2020, © Crown Copyright 2022

Impact of Covid-19 on Sectors

The chart above looks at long term trends in sector development in Shropshire. Looking at the change that has occurred in employment and business counts since 2019 highlights sectors that have been particularly impacted by the Covid-19 pandemic and consequent trading restrictions that were imposed in 2020 and 2021 to protect public health.

The data shows that in employment terms, there was significant growth in employment in the professional, scientific and technical sector and within business administration and support despite there being a small dip in the number of enterprises operating between 2019 and 2021 in the case of the former. Both sectors made strong use of the Coronavirus Job Retention Scheme (CJRS) which should have helped protect jobs.

Other sectors to have achieved employment growth between 2019 and 2020 include retail; information & communication; education; health; and arts, entertainment and recreation.

The sectors where the business count has fallen most between 2019 and 2021 are agriculture (although employment does not appear to have been impacted so a fall in business counts may be due to consolidation rather than busines failure) and education.

The table also shows the percentage of sector employments which were furloughed in May 2021 when furlough levels were still very high. Not surprisingly, use of the CJRS was highest in the accommodation and food sector.

Impact of Covid-19 by Sector

<table>
<tr><th></th><th>% Employment Change 2019/20</th><th>% Change in Enterprises 2019/21</th><th>% of Employments furloughed (May 2021)</th></tr>
<tr><td>Agriculture, forestry & fishing</td><td>0.0%</td><td>-6.4%</td><td rowspan="2">2.8%</td></tr>
<tr><td>Mining, quarrying & utilities</td><td>0.0%</td><td>+13.3%</td></tr>
<tr><td>Manufacturing</td><td>-8.0%</td><td>-0.6%</td><td>8.6%</td></tr>
<tr><td>Construction</td><td>-11.8%</td><td>+2.8%</td><td>7.2%</td></tr>
<tr><td>Motor trades</td><td>-6.7%</td><td>+2.8%</td><td rowspan="3">6.7%</td></tr>
<tr><td>Wholesale</td><td>0.0%</td><td>0.0%</td></tr>
<tr><td>Retail</td><td>+4.0%</td><td>0.0%</td></tr>
<tr><td>Transport & storage (inc postal)</td><td>-0.0%</td><td>+2.2%</td><td>6.1%</td></tr>
<tr><td>Accommodation & food services</td><td>-23.1%</td><td>+2.6%</td><td>20.6%</td></tr>
<tr><td>Information & communication</td><td>+10.0%</td><td>-1.5%</td><td rowspan="3">7.4%</td></tr>
<tr><td>Financial & insurance</td><td>0.0%</td><td>+7.1%</td></tr>
<tr><td>Property</td><td>-15.4%</td><td>+3.8%</td></tr>
<tr><td>Professional, scientific & technical</td><td>+16.7%</td><td>-0.7%</td><td>8.7%</td></tr>
<tr><td>Business administration & support services</td><td>+25.0%</td><td>+3.4%</td><td>12.7%</td></tr>
<tr><td>Public administration & defence</td><td>-5.0%</td><td>+9.5%</td><td>1.6%</td></tr>
<tr><td>Education</td><td>+4.8%</td><td>-8.9%</td><td>4.7%</td></tr>
<tr><td>Health</td><td>+2.6%</td><td>-1.9%</td><td>1.5%</td></tr>
<tr><td>Arts, entertainment, recreation & other services</td><td>+8.3%</td><td>-1.1%</td><td>6.7%</td></tr>
<tr><td>Total</td><td>-1.5%</td><td>-0.7%</td><td>8.0%</td></tr>
</table>

Source: ONS, IDBR 2021, ONS BRES 2020, HMRC © Crown Copyright 2022

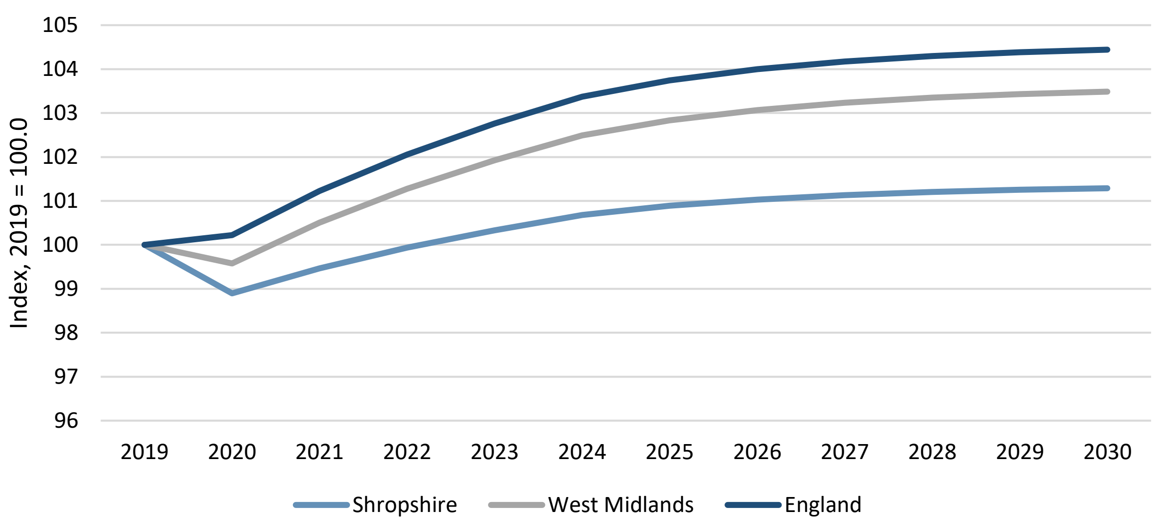
Note: Employment % change reflects one year. Enterprise change reflects two years

RAG rating = Green= better than Shropshire average, Amber = similar to the Shropshire average. Red = Worse that the Shropshire average

Job Projections

The Shropshire employment base is expected to rise slowly over the next decade, with an additional 1,745 jobs being created between 2019 and 2030. This represents growth of 1.3%. National and regional growth is expected to exceed employment growth in Shropshire, at +4.4% and +3.5% respectively over the 2019-2030 timeframe.

Projected Growth in Employments, 2019-2030



Source: EMSI Burning Glass

According to employment projections modelled by EMSI, the sector which is projected to achieve the highest level of growth between 2019 and 2030 is accommodation and food services. The sector is expected to grow by a fifth, which will involve the creation of 2,538 jobs.

Other sectors projected to record double digit growth include mining and quarrying (+29.3%, but from a very low base), transport & storage (+14.0%), finance & insurance (+13.6%) and real estate activities (+16.8%).

In contrast, significant numbers of jobs look set to be lost in agriculture (-492), wholesale, retail and motor trades (-244), education (-1,091) and human health and social care (-973).

Change in Employment by Sector, 2019-2030

	2019 – 2030 Change	2019-2030 % Change
Agriculture, Forestry and Fishing	(492)	(5.6%)
Mining and Quarrying	75	29.3%
Manufacturing	161	1.3%
Electricity, Gas, Steam and Air Conditioning Supply	(20)	(10.8%)
Water Supply; Sewerage, Waste Management and Remediation Activities	56	4.4%
Construction	350	3.8%
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	(244)	(1.1%)
Transportation and Storage	702	14.0%
Accommodation and Food Service Activities	2,538	20.1%
Information and Communication	12	0.4%
Financial and Insurance Activities	204	13.6%
Real Estate Activities	591	16.8%
Professional, Scientific and Technical Activities	(63)	(0.7%)
Administrative and Support Service Activities	59	1.0%
Public Administration and Defence; Compulsory Social Security	110	2.2%
Education	(1,091)	(10.9%)
Human Health and Social Work Activities	(973)	(5.1%)
Arts, Entertainment and Recreation	(67)	(2.2%)
Other Service Activities	(164)	(5.4%)

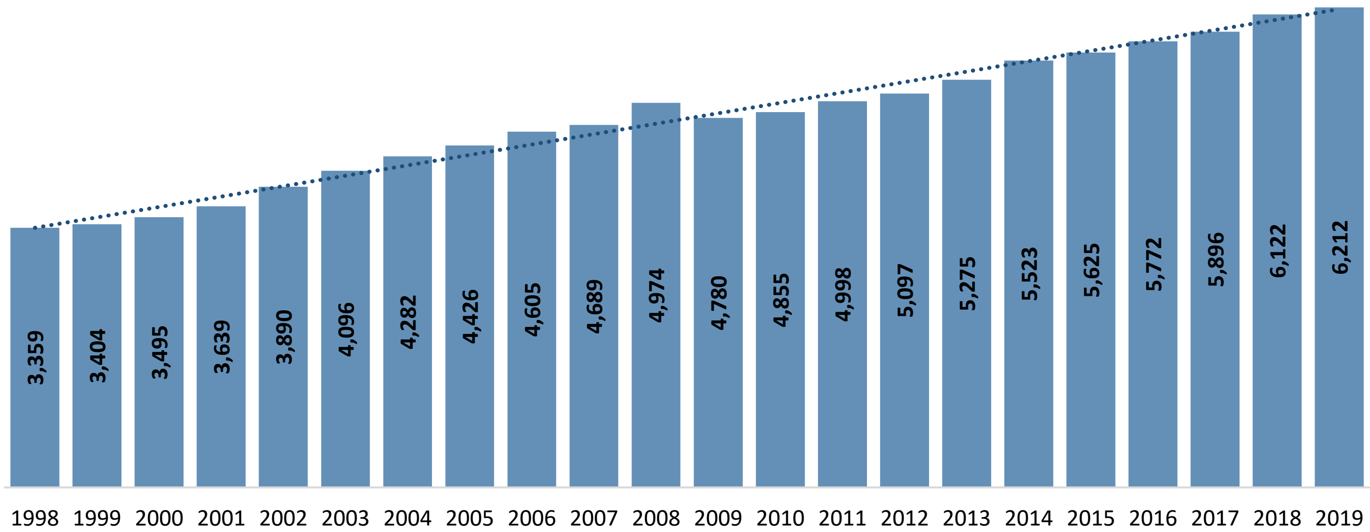
Source: EMSI Burning Glass

Gross Value Added[2]

Productivity in Shropshire is comparatively low and has been negatively impacted by the mix of sectors which dominate employment and low workplace earnings. The lack of corporate headquarters located in the county also has an adverse effect, as GVA generation is often attributed entirely to the HQ base rather than being split pro rata to branches. High levels of out-commuting, especially amongst top earners, also suppresses the value of Shropshire GVA (and particularly GVA per capita).

The following chart shows medium term trends in GVA generation in Shropshire. Overall, the trajectory has been upwards since 1998, albeit with a notably dip in 2009 when the country was in recession. Thereafter, GVA has increased in each year, reaching £6,212 million in 2019. The impact of the Covid-19 pandemic on GVA has yet to be captured within official ONS data, with the release of the 2020 data subject to delay.

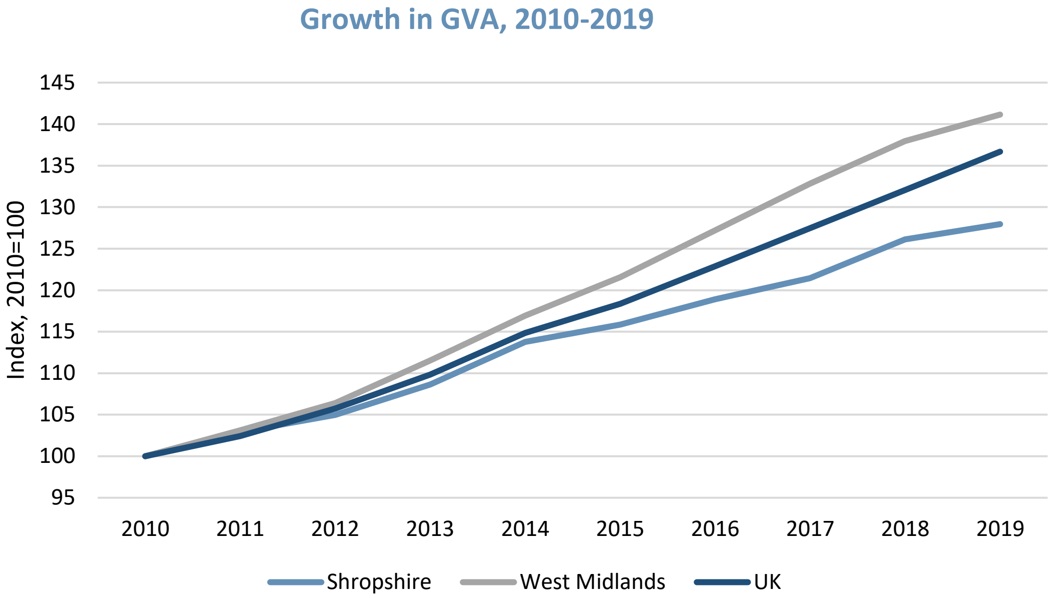
GVA in Shropshire, 1998-2019



Source: ONS, Headline GVA at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

Taking 2010 as the base year, the following chart shows that GVA generation in Shropshire has not kept pace with the West Midlands or the United Kingdom. Between 2010 and 2019, headline GVA advanced by 28% compared with growth of 41.1% regionally and 36.7% nationally. GVA in Shropshire has grown more slowly than GVA in the West Midlands in each year since 2010. Compared with both the West Midlands and the United Kingdom, annual growth has decelerated in Shropshire since 2015.

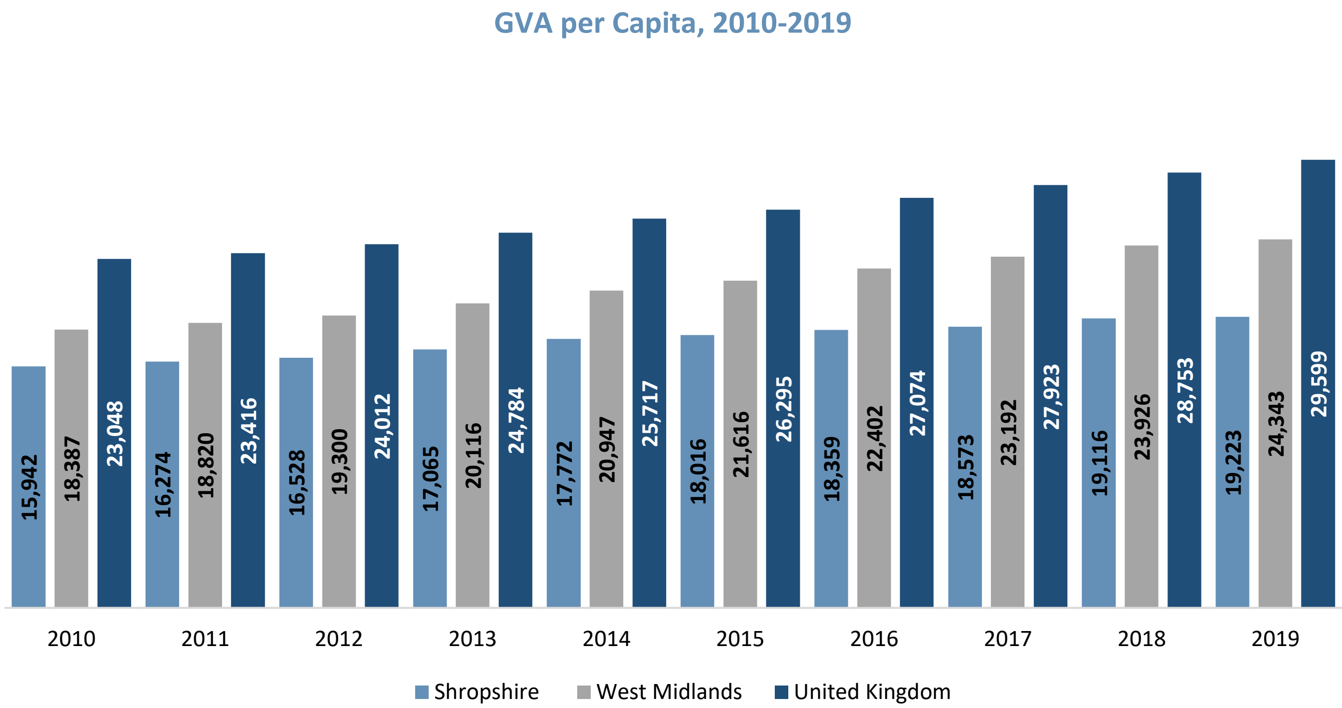
[2] Gross value added (GVA) is a means of measuring the contribution to the economy by producers or sectors. It is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used in production



Source: ONS, Headline GVA at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

Per Capita GVA

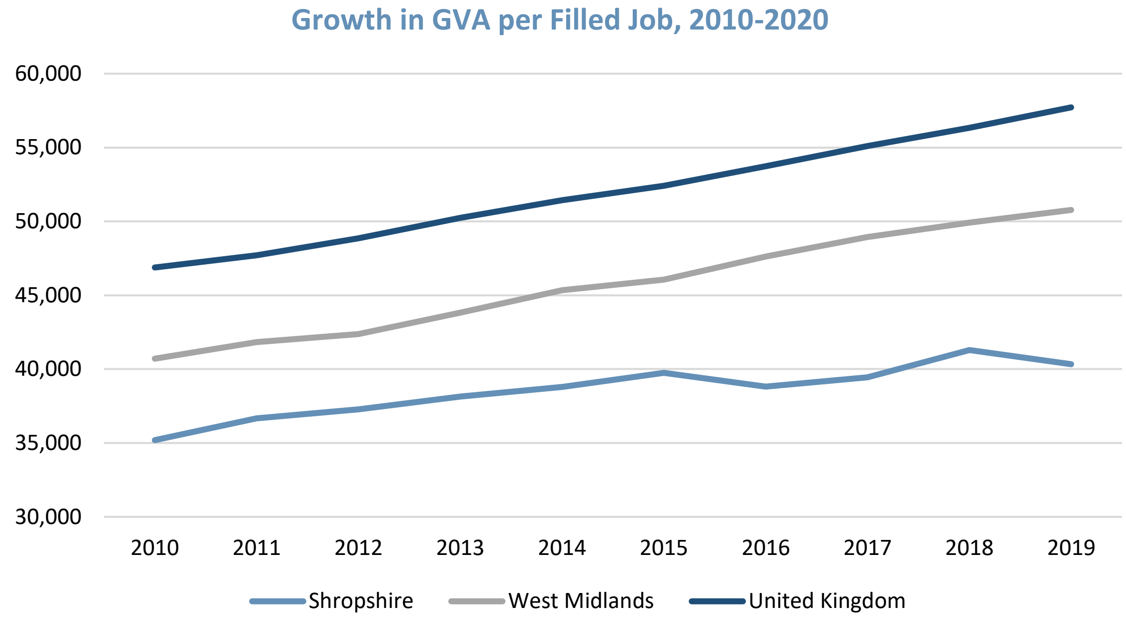
GVA per head of population in Shropshire rose by £3,281 between 2010 and 2019 to £19,223. This constitutes a 20.6% rise, which compares with growth of 32.4% regionally and 28.4% nationally. As illustrated in the chart below, per capita GVA is notably lower in Shropshire than in the West Midlands or the United Kingdom - £5,120 lower than in the West Midlands (21.0% lower) and £10,376 lower than in the UK (35.1% lower). GVA per capita in Shropshire is impacted by net out-commuting (especially amongst the highest earners) and by the high dependency ratio in the county, which means there are comparatively fewer people of working age than there are regionally or nationally.



Source: ONS, GVA per Capita at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

GVA per Filled Job

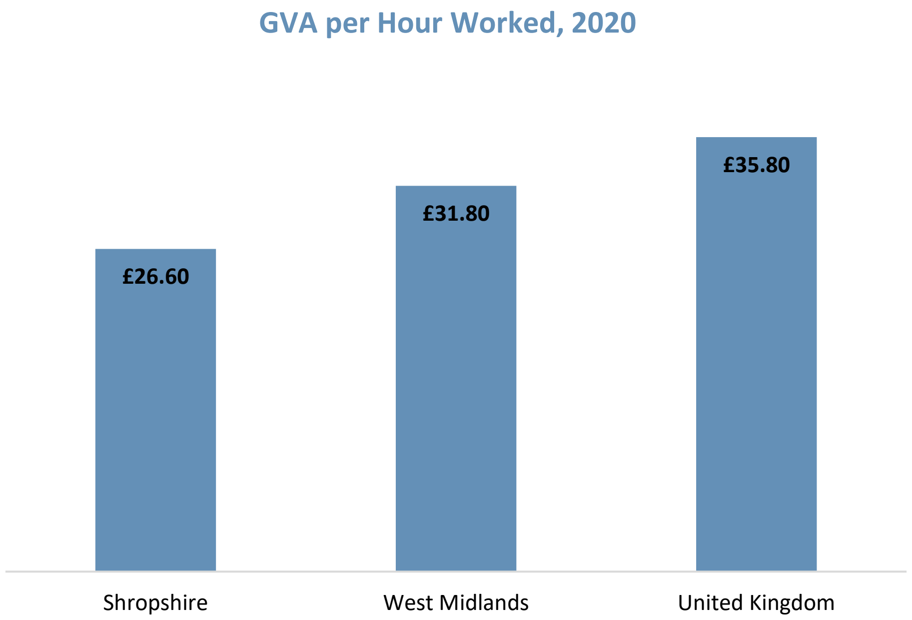
GVA per filled job stood at £40,341 in Shropshire in 2019, which is 20.5% less than in the West Midlands and 30.1% less than in the UK. The gap between the Shropshire and regional and national averages has widened since 2020, with the GVA value in Shropshire rising by 14.6% compared with growth of 24.7% in the West Midlands and 23.1% in the UK.



Source: ONS, GVA per Filled Job at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

GVA per Hour Worked

GVA per hour worked is an indicator of productivity, and the productivity gap between Shropshire and the national average is demonstrated by the official statistics. In Shropshire, GVA of £26.60 per hour worked was generated in 2019 – this is £9.20 or 25.7% less than in the national average and £5.20 (16.4%) less than in the West Midlands. The gap has widened since 2010, with GVA per hour worked rising by 14.2% in Shropshire compared with growth of 23.9% in the West Midlands and 19.9% nationally.



Source: ONS, GVA per Hour Worked at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

GVA by Sector

The following table shows the distribution of GVA generation in Shropshire across key industrial sectors. The highest generator of GVA is real estate activities, which accounted for 17.5% of all Shropshire GVA in 2019. Manufacturing is the only other sector to contribute more than 10% to overall GVA.

GVA by Sector, 2019

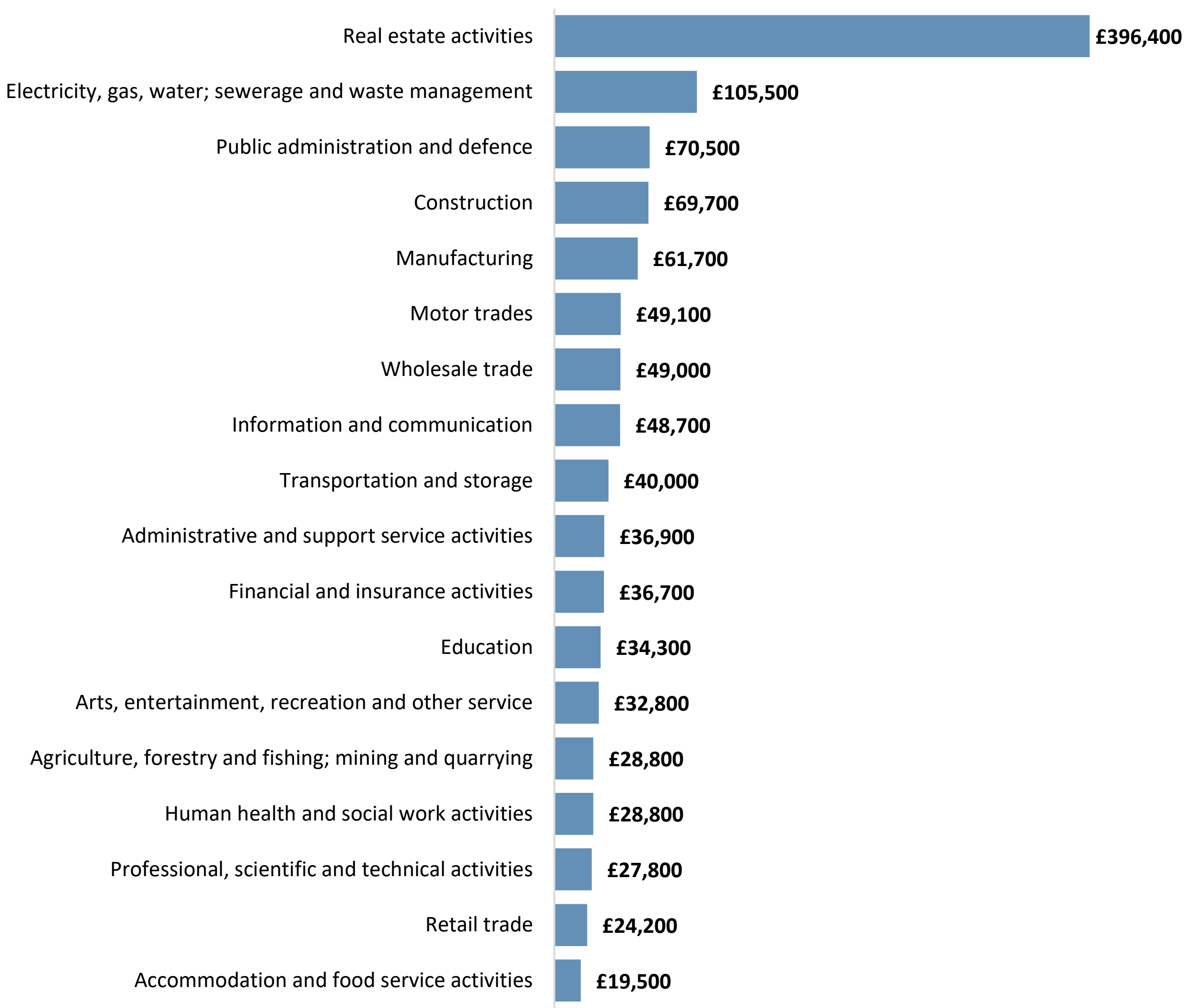
	GVA Million	% of GVA
Agriculture, forestry and fishing; mining and quarrying	326	5.2%
Manufacturing	710	11.4%
Electricity, gas, water; sewerage and waste management	144	2.3%
Construction	523	8.4%
Motor trades	172	2.8%
Wholesale trade	294	4.7%
Retail trade	314	5.1%
Transportation and storage	200	3.2%
Accommodation and food service activities	195	3.1%
Information and communication	134	2.2%
Financial and insurance activities	55	0.9%
Real estate activities	1,090	17.5%
Professional, scientific and technical activities	292	4.7%
Administrative and support service activities	277	4.5%
Public administration and defence	335	5.4%
Education	377	6.1%
Human health and social work activities	561	9.0%
Arts, entertainment, recreation and other service	213	3.4%
Total	6212.0	100.0%

Source: ONS, GVA by Sector at Current Prices, Unsmoothed, (Balanced Approach), 2019, © Crown Copyright 2022

The following chart shows the disparity between sectors when it comes to GVA generation. Looking at GVA generated per employment, real estate and utilities emerge as highly productive sectors, generating approximately £396,400 and £105,500 per employment respectively. Also generating higher than average GVA per job are public administration & defence, construction, manufacturing, motor trades, wholesale and information and communication.

At the other end of the scale, the lowest GVA generators in terms of employment are accommodation and food services and retail trade.

GVA per Employment, 2019



Source: ONS, GVA by Sector at Current Prices, Unsmoothed, (Balanced Approach), 2019, BRES Employment data 2020 © Crown Copyright 2022

The sectors which have seen strongest growth in GVA since 2010 include:

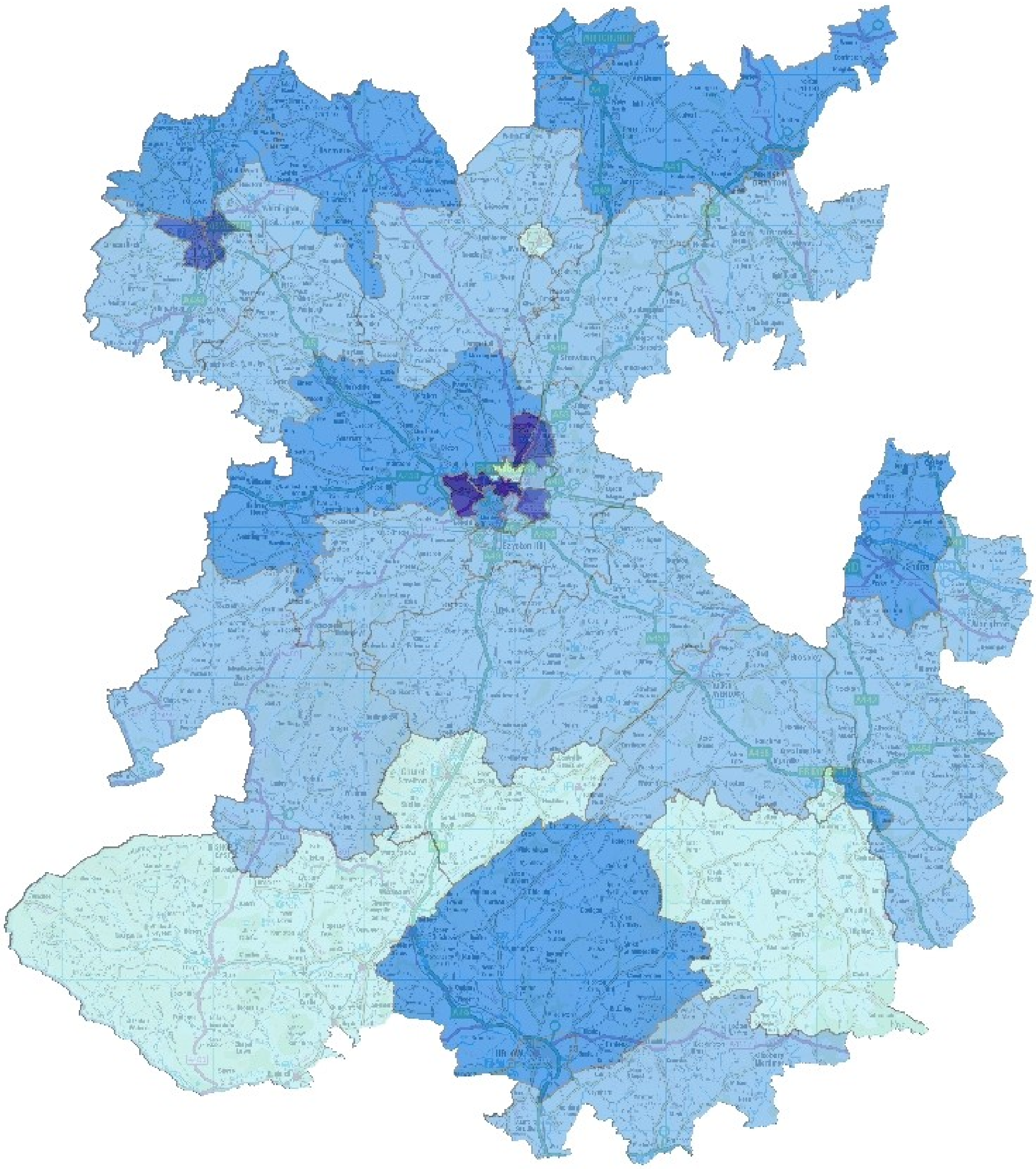
- Construction: +106.7%
- Accommodation & Food Services: +80.6%
- Business Administration & Support Services: 74.2%
- Professional, Scientific & Technical: +70.8%

The poorest performing sectors in terms of GVA generation include:

- Finance & Insurance: -62.1%
- Retail: +4.0%
- Health & Social Care: +7.1%
- Public Administration & Defence: +8.4%

The following map shows GVA generation in Shropshire at Mid Super Output Level. It shows that Shrewsbury and Oswestry are where GVA generation is primarily concentrated, which reflects the higher level of employment in these areas.

GVA by MSOA, 2019



GVA 2019 £ Million

- 53.4 - 91.6
- 91.7 - 143.6
- 143.7 - 202.1
- 202.2 - 259.1
- 259.2 - 374.3

Source: ONS GVA at Small Geographies, 2019, © Crown Copyright 2022

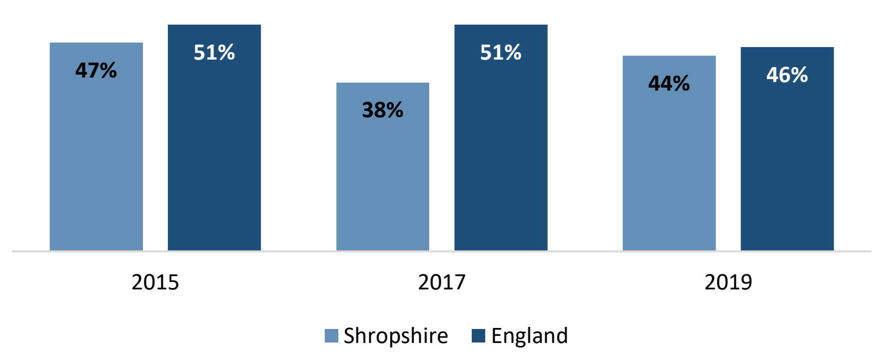
Recruitment, Job Vacancies and Job Postings

Recruitment Trends

Unfortunately, the latest Employer Skills Survey (2019) was undertaken pre-pandemic, so data relating to this survey should be treated with caution as trends and business priorities may have changed over the last two years.

However, the 2019 survey suggested that 44% of Shropshire employers had recruited to at least one post within the last year compared with 46% of employers nationally. The proportion recruiting in Shropshire had risen compared with 2017 but was lower than it had been 2015.

Proportion of Employers having Recruited over the Last Year, 2015-2019



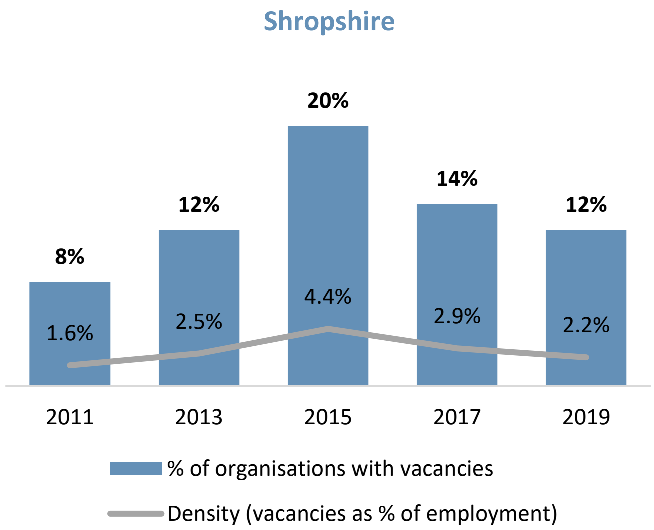
Source: Employer Skills Survey, 2015, 2017 & 2019

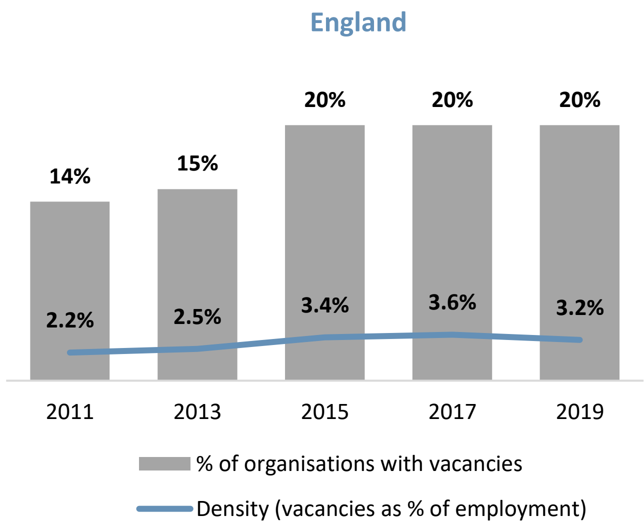
Volume of Job Vacancies

The proportion of employers reporting at least one current job vacancy is captured as part of the biennial Employer Skills Survey. The survey conducted in 2015 found that a fifth of Shropshire employers had at least one vacancy, this fell to 14% and then to 12% in the subsequent surveys in 2017 and 2019. In England meanwhile, the proportion remained at 20% across the three surveys in 2015, 2017 and 2019.

Meanwhile, the density of job vacancies (vacancies as a proportion of employment) fell from 4.4% in Shropshire in 2015 to 2.2% in 2019. This equates with over 2,700 vacancies. The density level is lower than the national average (3.2% in 2019). Higher levels of job vacancies can indicate a more buoyant labour market and can be considered a positive indicator of economic health provided that suitable personnel are available to fill the vacancies.

Proportion of Businesses with Job Vacancies and Density of Job Vacancies, 2011-2019





Source: Employer Skills Survey, 2011, 2013, 2015, 2017 & 2019

Vacancies by Occupation

The most common occupations for which employers were reporting vacancies in 2019 were elementary positions (30% of employers who had a vacancy) and caring, leisure and other service occupations (18% of all employers with a vacancy). For both these occupations, the proportion of businesses reporting a vacancy was higher than the national average.

In contrast, considerably fewer Shropshire employers who had at least one vacancy were reporting a vacancy for sales and customer service staff, at 5% compared with 13% for England. Shropshire employers were also less likely to have vacancies for professionals, associate professionals, administrative staff and skilled trades workers.

33% of employers with vacancies had vacant positions classified as high skill, which compares with 35% nationally. The proportion has risen in Shropshire from 21% in 2015. 23% of employers said they had vacancies which were service-intensive in 2019 (27% in England) while 38% had labour-intensive vacancies (25%).

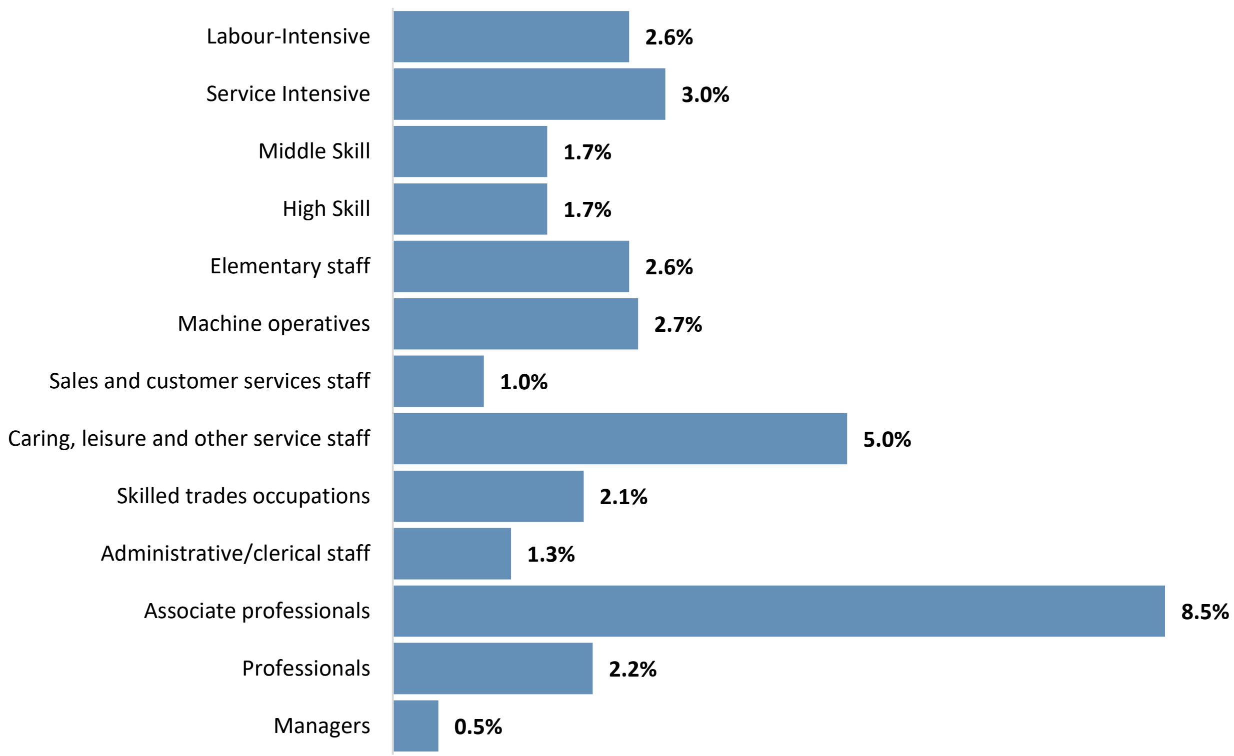
Percentage of Employers with Vacancies by Occupation, 2019

	Shropshire	England
Managers	10%	6%
Professionals	11%	15%
Associate Professionals	13%	18%
Administrative/Clerical Staff	10%	15%
Skilled Trades	15%	17%
Caring, Leisure & Other Service	18%	14%
Sales & Customer Services	5%	13%
Machine Operatives	9%	7%
Elementary Staff	30%	19%
Unclassified Staff	0%	2%
High Skill	33%	35%
Middle Skill	24%	30%
Service-Intensive	23%	27%
Labour Intensive	38%	25%

Source: Employer Skills Survey, 2019
Note: Includes only employers with at least one vacancy. Numbers do not add up to 100% as some establishments have vacancies across multiple occupations

Vacancy density by occupation (the proportion of jobs within an occupation which are vacant) shows that there are most vacancies within the associate professional classification and within care and leisure occupations. Proportionally, there are fewer vacancies for managers, reflecting lower levels of churn and fewer local employment opportunities.

Vacancy Density by Occupation, 2019



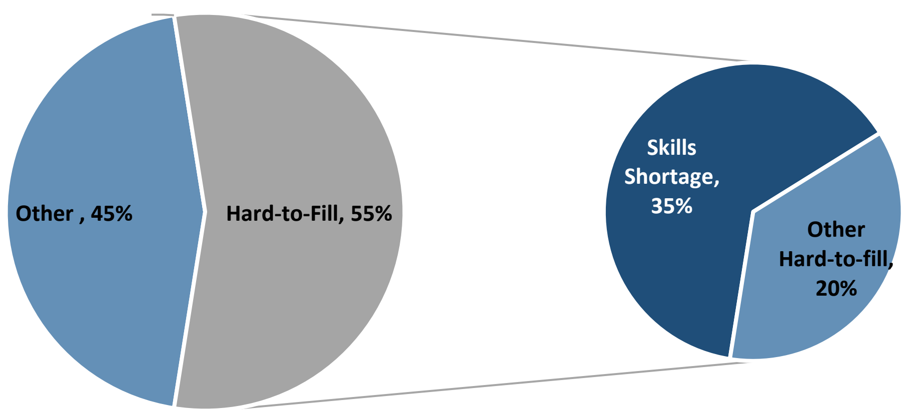
Source: Employer Skills Survey, 2019

Hard-to-Fill Vacancies

6% of employers in 2019 said that they had a hard-to-fill vacancy (8% nationally), while 4% said that they had at least one vacancy that was hard-to-fill due to a skills shortage (6% nationally).

Of all vacancies in Shropshire, 55% were recorded as hard-to-fill in 2019. This compares with 44% nationally. 35% were hard to fill for reasons relating to skills (skills shortage vacancies or SSVs) – again this proportion is higher than the national average of 32%. However, as a proportion of all hard-to fill vacancies, SSVs represented 64% of the total, while in England they represented 73%.

Types of Vacancy in Shropshire, 2019



Source: Employer Skills Survey, 2019

The main reasons that Shropshire employers claim to have job vacancies that they struggle to fill differ discernibly from England as a whole. The main reasons in Shropshire include the low number of applicants generally (36% compared with 18% in England) and not enough people being interested in this type of work (26% compared with 21% in England).

The most common reason nationally was a low number of applicants with the required skills (39% compared with 22% in Shropshire). Shropshire employers were also significantly more likely to report a low number of applicants with the right attitude and the job being in a remote location/poor public transport.

Reasons why Vacancies are Hard-to-Fill, 2019

	Shropshire	England
Low number of applicants with the required skills	22%	39%
Lack of work experience the company demands	17%	17%
Not enough people interested in this type of job	26%	21%
Low number of applicants with the required attitude, motivation or personality	22%	14%
Lack of qualifications the company demands	6%	13%
Low number of applicants generally	36%	18%
Poor terms and conditions (e.g. pay) offered for the post	12%	14%
Job entails shift work/unsociable hours	11%	10%
Remote location/poor public transport	16%	10%
Too much competition from other employers	6%	7%
Other	7%	17%

Source: Employer Skills Survey, 2019

Just 8% of Shropshire employers with hard-to-fill vacancies did not consider the vacancies that they had did not impact their business. This compares with 6% in England. Employers in Shropshire were more likely to consider the impact to be an increased workload for other staff to be the only impact than their national counterparts.

Implications of Hard-to-Fill and Skills Shortage Vacancies, 2019

	Shropshire		England	
	All hard-to-fill	SSVs	All hard-to-fill	SSVs
Increased workload for other staff	82%	86%	82%	84%
Difficulties meeting customer services objectives	45%	42%	46%	50%
Increased operating costs	46%	42%	43%	45%
Lose business or orders to competitors	37%	20%	37%	41%
Delay developing new products or services	27%	32%	35%	39%
Difficulties meeting quality standards	37%	33%	33%	36%
Difficulties introducing new work practices	23%	27%	32%	36%
Outsource work	23%	20%	30%	33%
Withdraw from offering products or services	22%	18%	24%	25%
Difficulties introducing technological change	11%	12%	22%	24%
None	8%	6%	6%	6%
Any Impact	92%	94%	93%	94%
Increased workload only	18%	25%	12%	9%

Source: Employer Skills Survey, 2019

The majority of employers undertook at least one action to overcome difficulties in recruiting to hard-to-fill vacancies. The most common actions were increasing spend on advertising and recruitment and using new recruitment methods or channels.

Actions taken to Fill Hard-to-Fill Vacancies, 2019

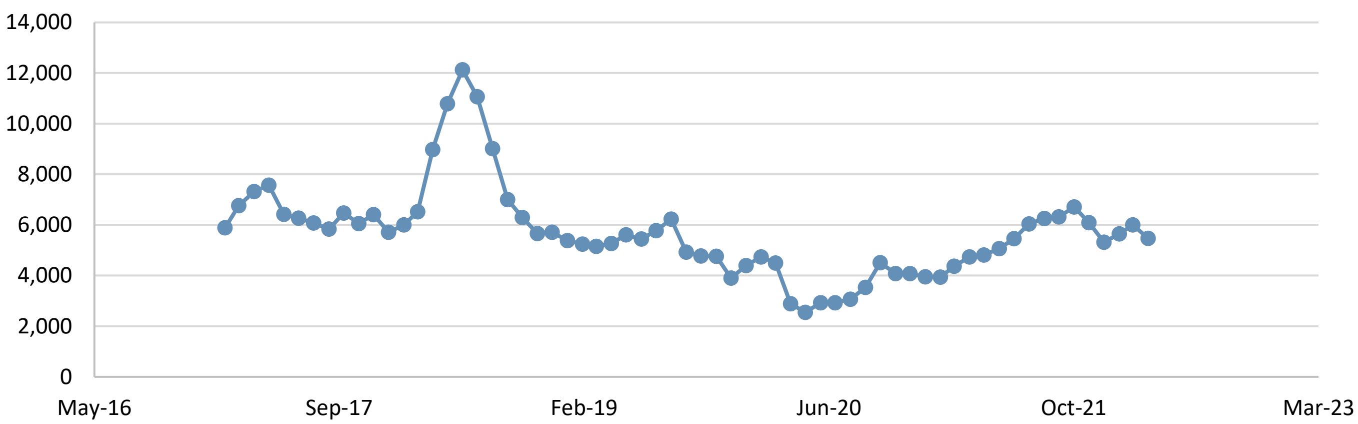
	Shropshire	England
Increasing advertising/recruitment spend	40%	36%
Using new recruitment methods or channels	40%	35%
Redefine existing jobs	16%	13%
Bringing in contractors	5%	8%
Increasing/expanding trainee programme	4%	8%
Increasing training given to existing workforce	5%	7%
Being prepared to offer training to less well qualified recruits	11%	6%
Increasing salaries	3%	5%
Recruiting workers who are non-UK nationals	3%	3%
Making the job more attractive (better T&Cs, working hours etc)	8%	3%
Other	2%	8%
Nothing	13%	11%

Source: Employer Skills Survey, 2019

Job Postings

The chart below shows that job postings peaked in June 2018 at over 12,000, since when they fell to between 5,000 and 6,000 unique postings a month until the start of the pandemic, when they plummeted. Postings rose consistently from the beginning of 2021 and continued to climb throughout the year, reaching 6,710 in November. They have since fallen back slightly, standing at 5,468 in April 2022.

Unique Job Postings: Shropshire



Source: EMSI Burning Glass

There are an average of three postings for each unique job, meaning that in April 2022, there were approximately 16,404 job advertisements. Posting intensity of 3:1 is average compared with the region and nationally. Overall, between May 2021 and April 2022 there were 81,045 postings in total, of which 27,907 were unique.

The table below shows that more than 6 times as many unique job postings are for jobs based in Shrewsbury than in any other Shropshire location. This is the equivalent of 57% of all unique postings. It should be noted though that as the County town, Shrewsbury may appear in advertisements for positions that are actually located outside the town itself. Oswestry featured in more than 2,200 unique postings, while the total for Ludlow was approaching 2,000.

Based on posting intensity, it appears that vacancies in Church Stretton are harder to fill than vacancies in Bridgnorth, Shifnal, Bishop’s Castle, Ellesmere and Craven Arms. This may be impacted by the types of vacancies occurring in each town.

Top 10 Locations Posting, May 2021-April 2022

	Number of Unique Postings	Posting Intensity
Shrewsbury	15,925	3:1
Oswestry	2,244	3:1
Ludlow	1,966	3:1
Market Drayton	1,774	3:1
Bridgnorth	1,462	2:1
Shifnal	665	2:1
Ellesmere	540	2:1
Bishop's Castle	531	2.1
Church Stretton	406	4:1
Craven Arms	251	2:1

Source: EMSI Burning Glass

Care workers/home carers and nurses were the two most commonly advertised occupations between May 2021 and April 2022. Both of these occupations, as well as nursing auxiliaries and assistants had a higher than average posting intensity, suggesting that jobs in these occupational classifications are harder to fill. In contrast, job vacancies in bookkeeping and sales appear less challenging to fill.

Top 10 Posted Occupations, May 2021-April 2022

	Number of Unique Postings	Posting Intensity
Care Workers and Home Carers	1,752	5:1
Nurses	1,403	7:1
Other Administrative Occupations	1,012	3:1
Sales Related Occupations	912	2:1
Customer Service Occupations	692	3:1
Kitchen & Catering Assistants	574	2:1
Cleaners & Domestics	554	3:1
Bookkeepers, Payroll Managers & Wages Clerks	438	2.1
Chefs	422	3:1
Nursing Auxiliaries & Assistants	406	5:1

Source: EMSI Burning Glass

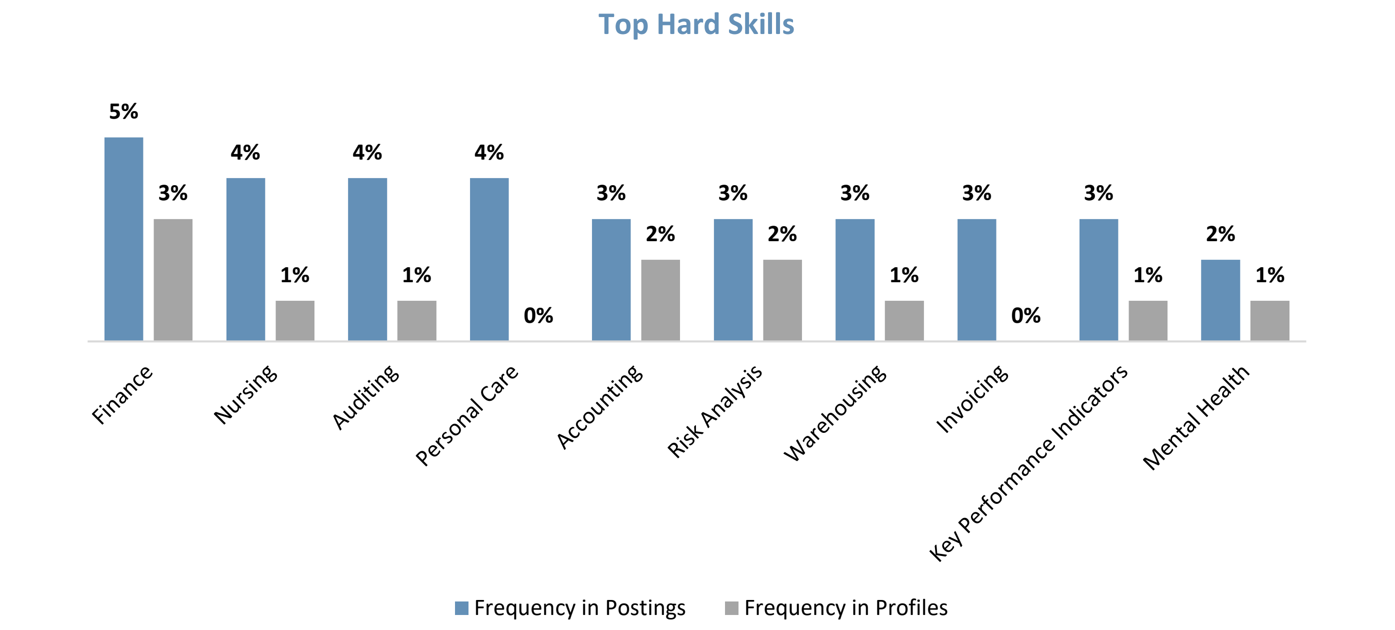
Support worker was the most common job title advertised between May 2021 and April 2022. The job titles with the highest posting intensity were for nurses (both staff nurses and registered general nurses).

Top 10 Posted Job Titles, May 2021-April 2022

	Number of Unique Postings	Posting Intensity
Support Workers	643	3:1
Care Assistants	295	4:1
Health Care Assistants	255	5:1
Registered General Nurses	224	11:1
Cleaners	215	2:1
Warehouse Operatives	194	2:1
Production Operatives	185	3:1
Administrators	174	2.1
Registered Nurses	153	4:1
Staff Nurses	146	10:1

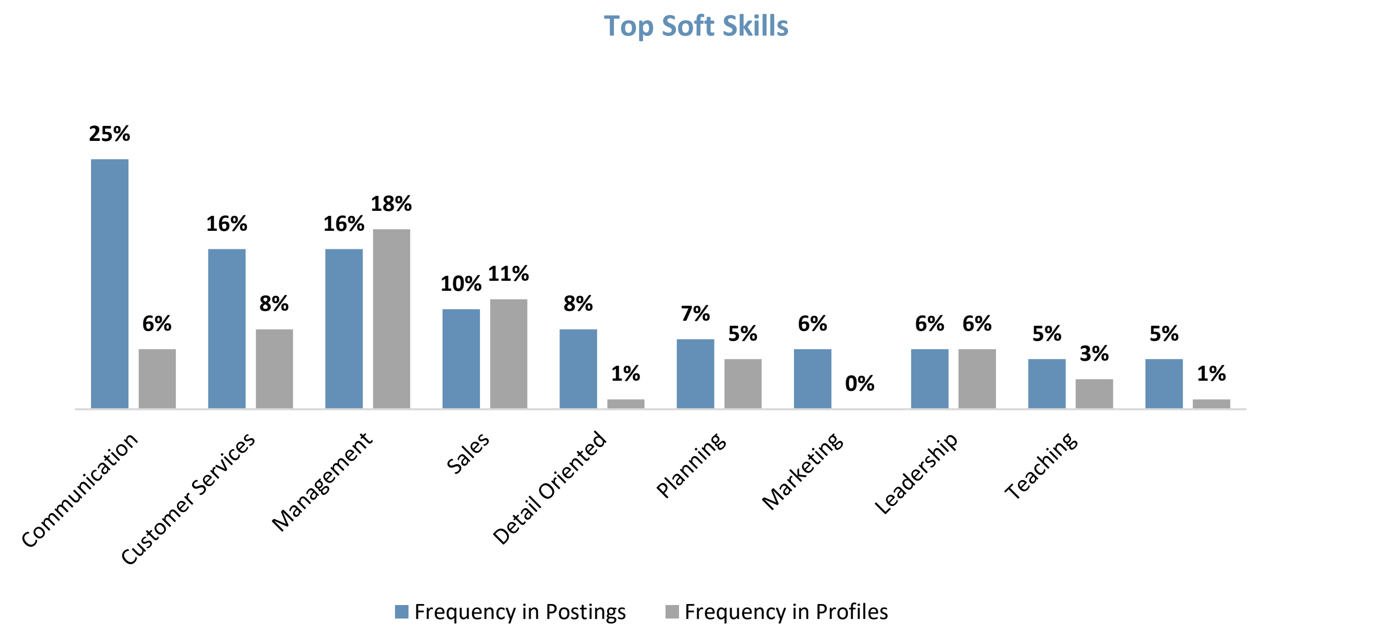
Source: EMSI Burning Glass

The following chart shows the frequency with which the leading "hard" skills are mentioned in job posting in comparison with the frequency in which they are mentioned in job seeker profiles that have been posted on job vacancy web sites. In each case, a higher proportion of jobs were seeking a specific "hard" skill than the proportion of worker profiles seeking employment, indicating a level of skills mismatch.



Source: EMSI Burning Glass

Similarly, for soft skills, recruiter requirements tended to surpass the skills included on potential candidates' profiles, with the exceptions of management skills, which slightly more people professed to have than was needed, leadership and sales skills, where demand and supply appear to be aligned. It appears that those seeking employment underestimate the importance of skills such as communication, customer service, enthusiasm, and attention to detail.



Source: EMSI Burning Glass

Business Activity and Confidence

The Chamber of Commerce Quarterly Economic Survey (QES) is recognised as a key economic indicator by the Government, the Bank of England and independent economists. Its results represent an up-to-date snapshot of current operating conditions and business confidence across the nation.

The results of the latest Shropshire survey (including Telford & Wrekin) can be found here:

Quarterly Economic Survey - Shropshire Chamber (shropshire-chamber.co.uk)

Theme: Employment & Skills

Evidence relating to:

- Labour Force & Economic Activity
- Employment & Self-Employment
- Self-Employment Income Support Scheme
- Commuting & Travel to Work
- Unemployment & Benefit Claimants
- Coronavirus Job Retention Scheme
- Qualifications & Occupations
- Skills Gaps
- Apprenticeships & Training
- Average Earnings

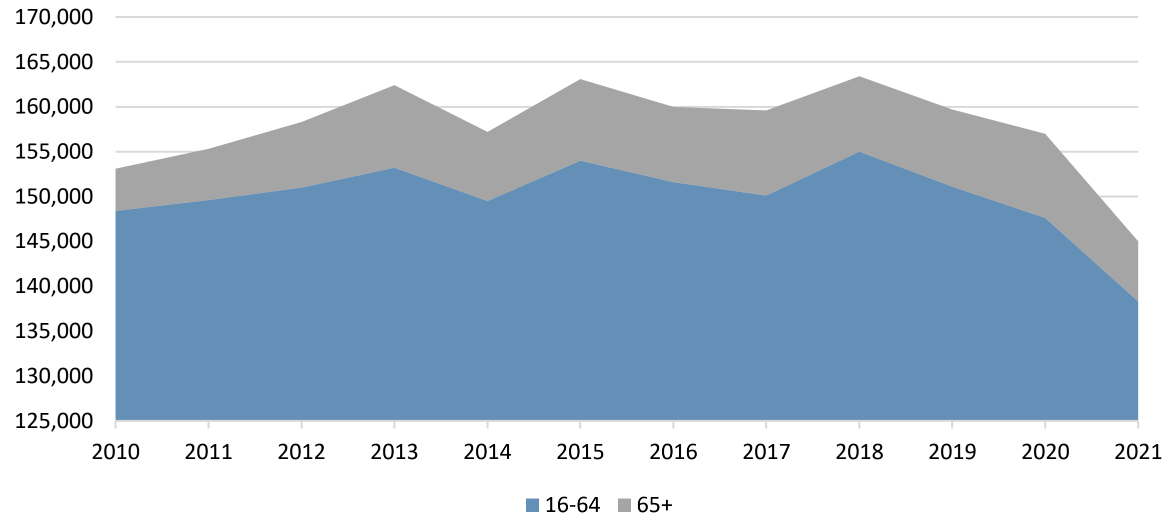
Employment & Skills

Economic Activity/Labour Force

According to the Annual Population Survey, there were 145,000 economically active people[3] in Shropshire in 2021, which is the equivalent of 57.5% of the population aged 16 and over. The size of the labour force fluctuates on an annual basis, but the trend was broadly upwards until 2018. Since then, numbers have declined in each year, falling by a total of 18,400 since the 2018 peak (a reduction of a tenth in the potential workforce). Over the last two years, this reduction will have been heavily influenced by the Covid-19 pandemic.

The following chart illustrates the development of Shropshire's labour supply since 2010. It is evident that a significant proportion of the labour force is above traditional retirement age, although numbers of those aged both 16-64 and 65+ have declined over the last year. The proportion of the labour force that is aged 65 and above has risen from 3.1% in 2010 to 4.6% in 2021.

Development of the Shropshire Labour Force: 2010-2020



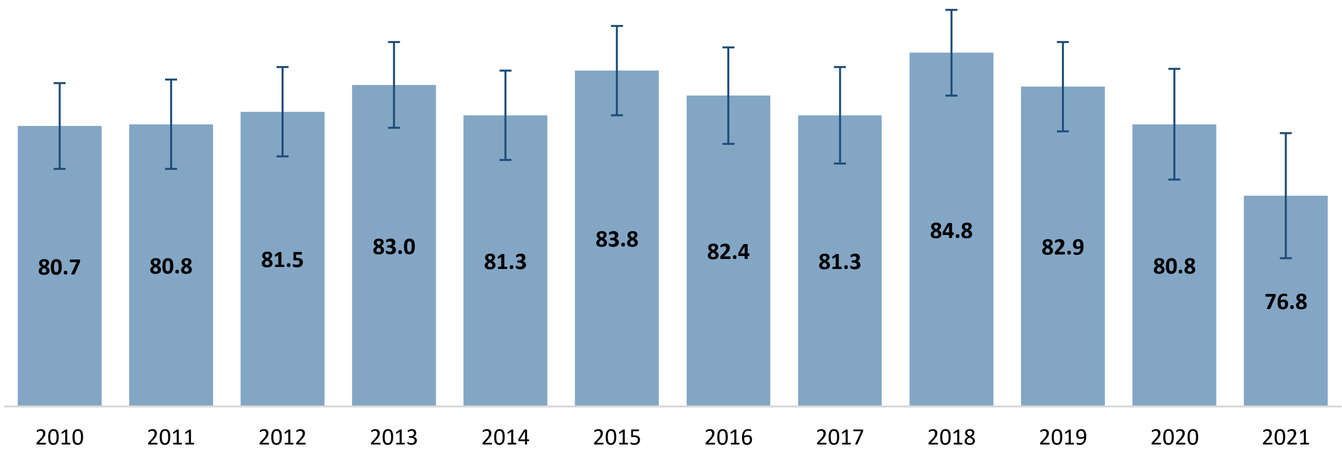
Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

Although changes to state pension age mean that the age structure of the labour force is changing, the 16-64 age group remains the mainstay of the workforce, accounting for 95.4% of all those who are economically active. The following chart shows the rate of economic activity for those aged 16-64 between 2010 and 2021 and includes confidence intervals.

It is evident that despite annual fluctuations, the rate has remained consistently well above 80% until 2020, when it slipped to 80.8% and 2021 when it slipped further to 76.8%. With a confidence interval of 3.5%, this means that the maximum rate is very likely to be 80.3% with the lowest rate 73.3%. Rates over the last two years have been clearly impacted by the Covid-19 pandemic; however, the very stark impact in Shropshire has not been replicated in the same way regionally and nationally. The drop in the economic activity rate in Shropshire between 2019 and 2021 of 6.1% compares with a decrease of 0.5% nationally and a very modest increase of 0.1% in the West Midlands.

[3] The labour force/those who are considered to be economically active comprises those who are in employment and those who are unemployed but who are seeking work and who are available to start work.

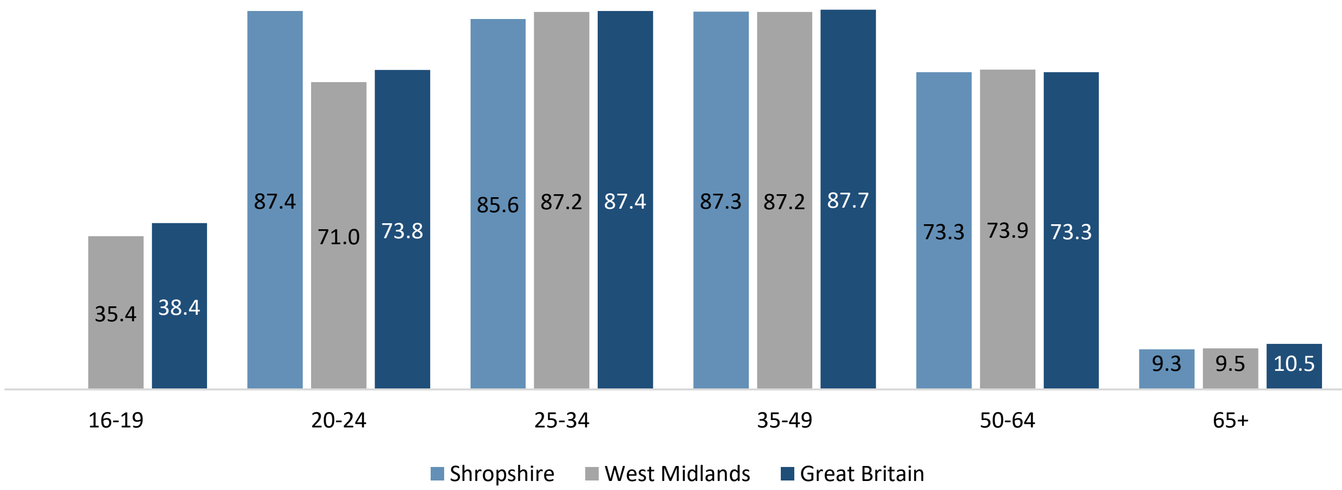
Shropshire Economic Activity Rates, 16-64 Population, 2010-2021



Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

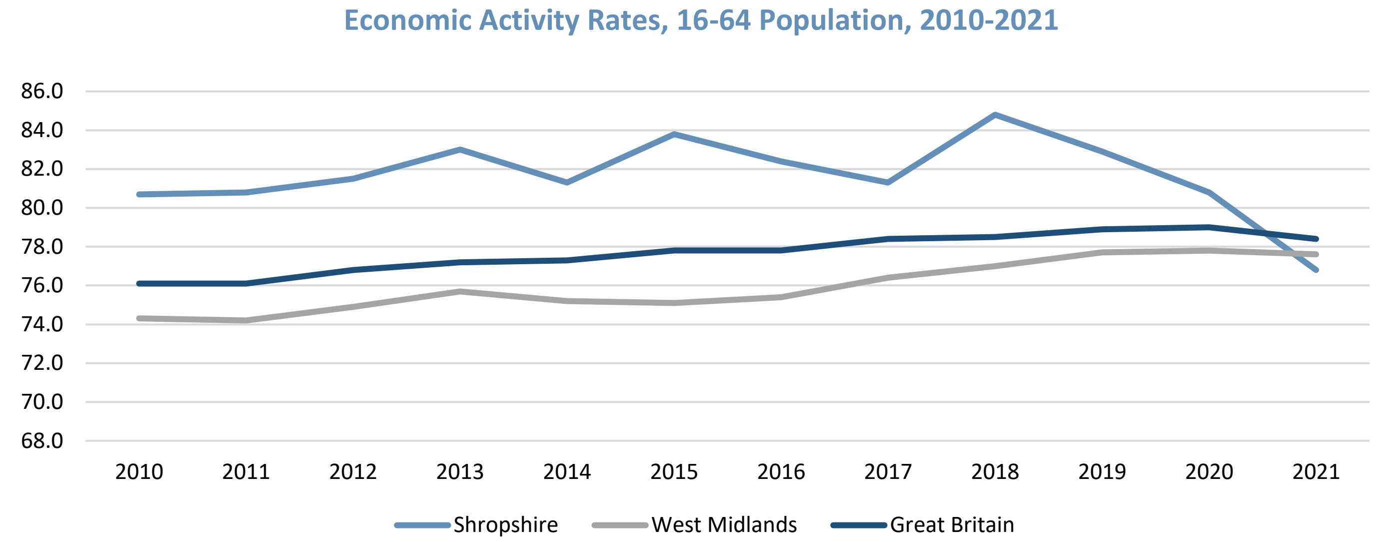
Economic activity is high amongst 35–49-year-olds, at 87.3% in Shropshire in 2021 (87.2% in the West Midlands and 87.7% in Great Britain). The rate is notably higher in the 20-24 age bracket in Shropshire than it is either regionally or nationally (in part due to lower numbers in higher education who are resident in Shropshire). The reverse is true amongst 25–34-year-olds and amongst those aged 50 and over although the difference is marginal. Data relating to the proportion of 16-19 year olds who are economically active has been suppressed as the sample size is too small to give a sufficiently reliable confidence interval. It should be noted that this data relates to 2021 and rates of participation may be influenced by the prevailing economic conditions brought about by the pandemic.

Economic Activity Rates by Age, 2021



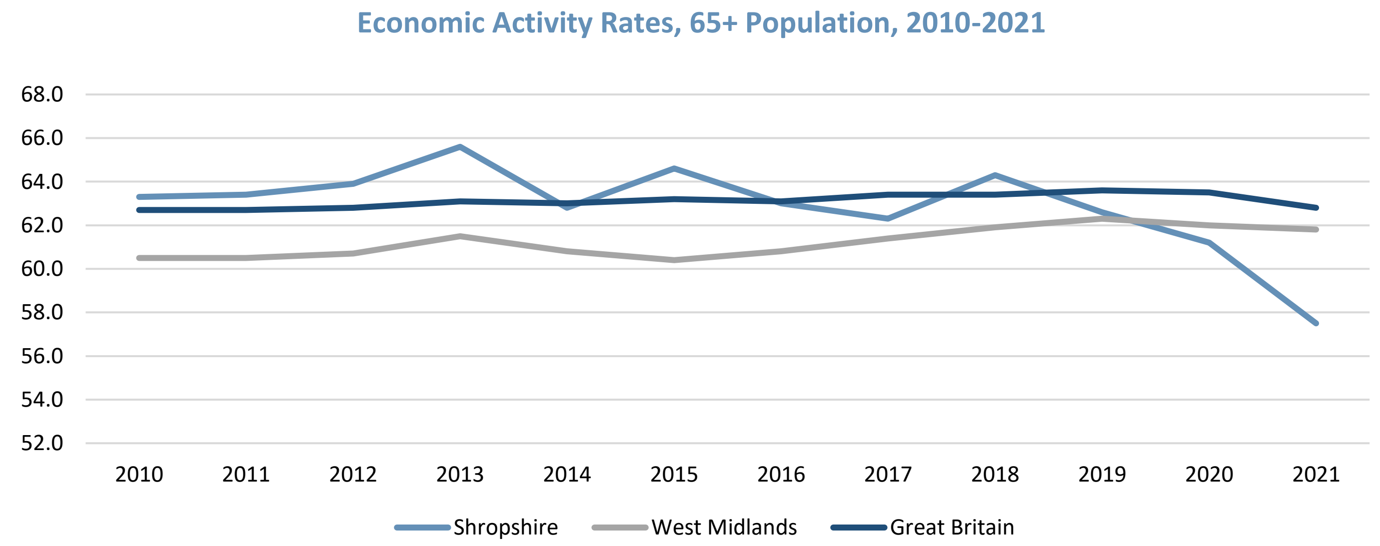
Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022
Note: Proportion of 16–19-year-olds who are economically active in Shropshire suppressed due to low sample size

The rate of labour market participation in Shropshire has traditionally been very high amongst the 16-64 population, with the proportion of this age bracket who are economically active consistently exceeding regional or national averages. However, the decline in the rate from 82.9% in 2019 to 76.8% in 2021 means that the rate is now marginally lower than the national and regional rates. While the Shropshire rate is subject to a wider confidence interval (3.5% compared with 0.9% for the West Midlands and 0.2% for Great Britain in 2021) it seems clear that the number and percentage of 16–64-year-olds who are economically active has fallen in a way that has not occurred in the West Midlands and Great Britain.



Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

When the total labour force is taken into consideration (that is everybody aged 16 and above that is economically active), activity rates have typically been more in line with the national average and somewhat above the regional level. However, as the chart below shows, the sharp decline in the rate since 2019 in Shropshire means that the rate is now appreciably lower in Shropshire than in either the West Midlands or Great Britain. Again, the confidence interval for Shropshire is wider at 3.1% than in the West Midlands or Great Britain (0.8% and 0.2% respectively).



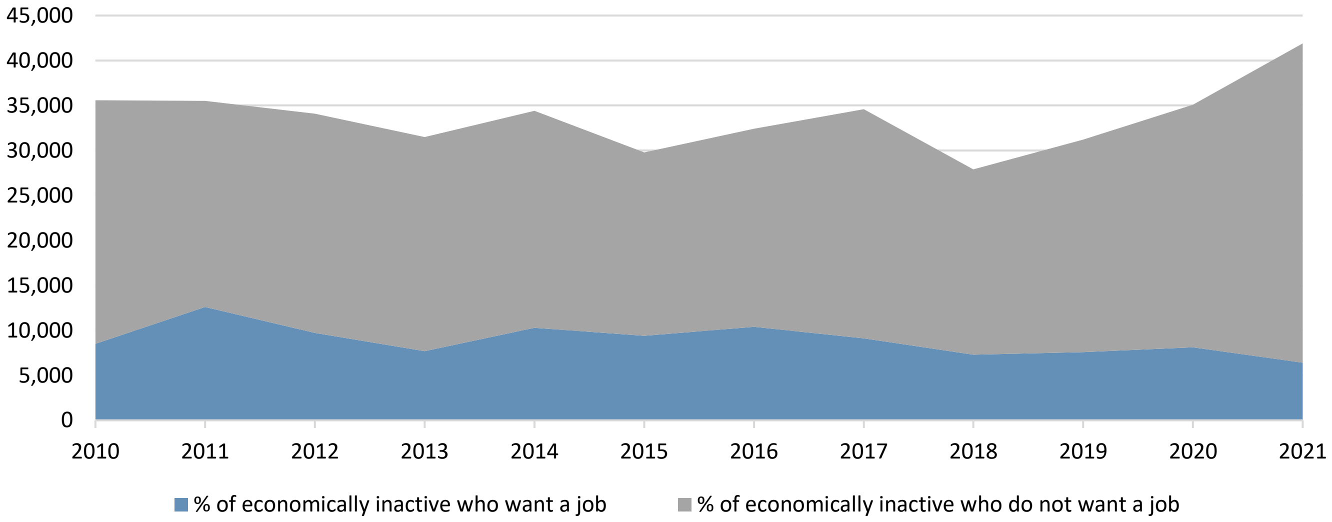
Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

Economic Inactivity

There were 41,900 Shropshire residents aged 16-64 who were not part of the labour force in 2021 according to the Annual Population Survey. The main reasons for being economically inactive are retirement, studying, ill health or raising a family/looking after a home. An increased tendency for women to continue working while raising a family and the trend towards later retirement meant that at the beginning of the 2010s, the number of economically inactive people was in decline. However, the trend has been starkly reversed over the last two years, with the number of economically inactive 16–64-year-olds rising by 12,000 or by 50% since 2018. The economically inactive now represent 23.2% of the age cohort (22.4% in the West Midlands and 21.6% in Great Britain).

Of those that are economically inactive, there is a minority that would like to work, at 6,400 in 2021, which is the equivalent of 15.2% of the total. The number wanting a job has declined form 8,100 in 2020 (-1,700, or -21%) while the number who do not want a job has risen to 35,500 (+8,500 or +31%).

Trends in Economic Inactivity, 2010-2021

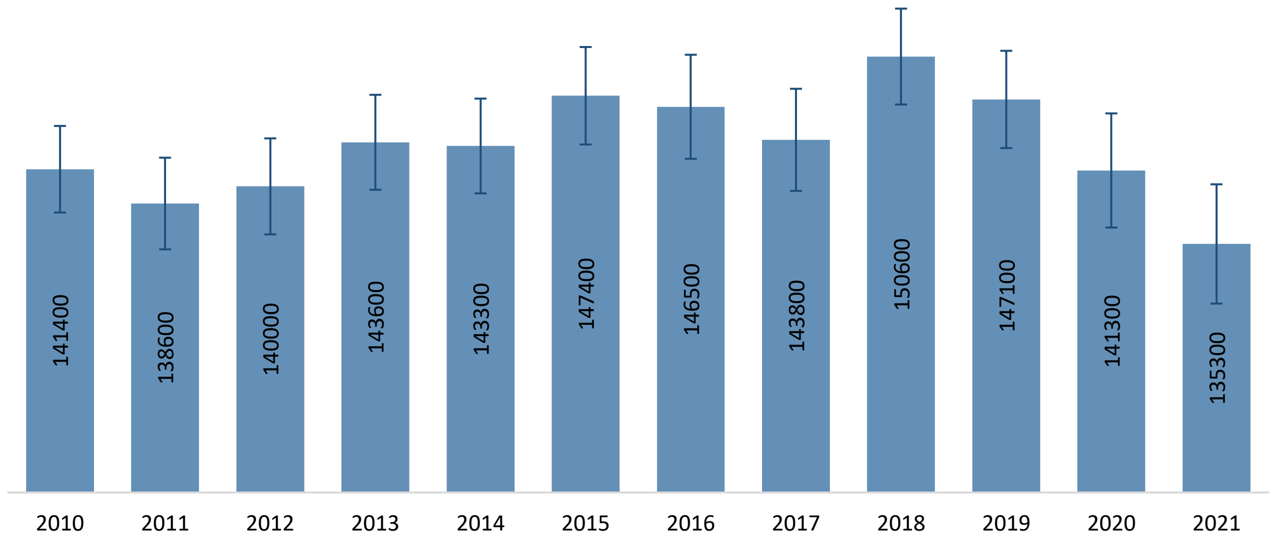


Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

Employment

Trends in employment in Shropshire reflect trends in economic activity, with the number in employment in decline since 2018. In 2021, 135,300 were in employment, which represents a decline of 15,300 (-10.2%). The employment rate over the same period fell from 82.3% to 75.1%.

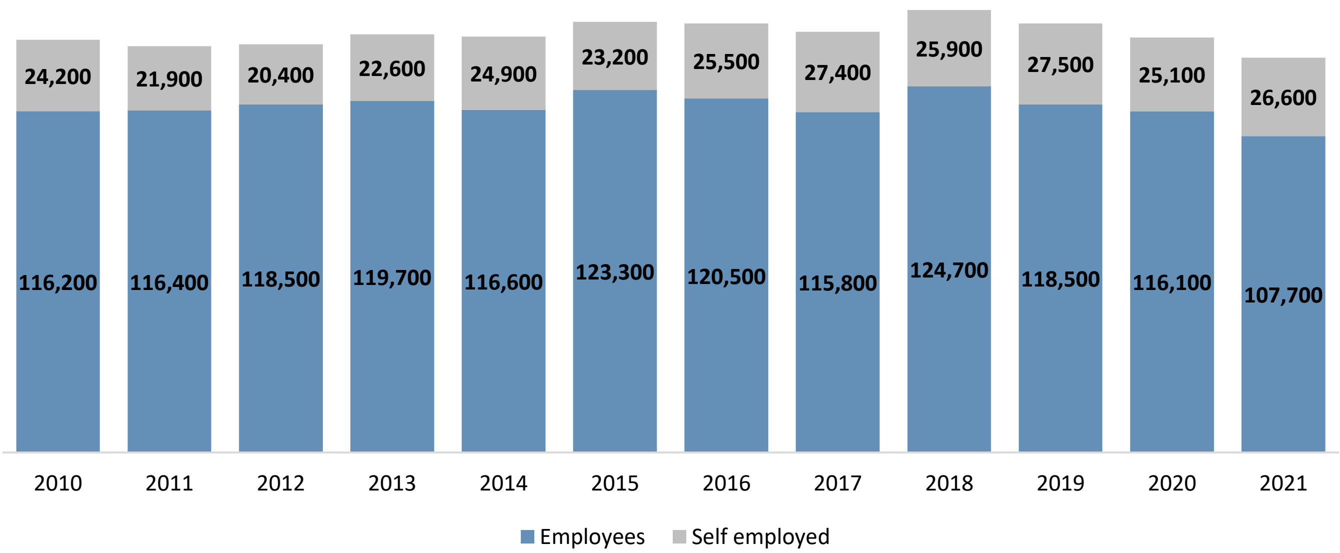
Levels of Employment in Shropshire, 2010 - 2021



Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

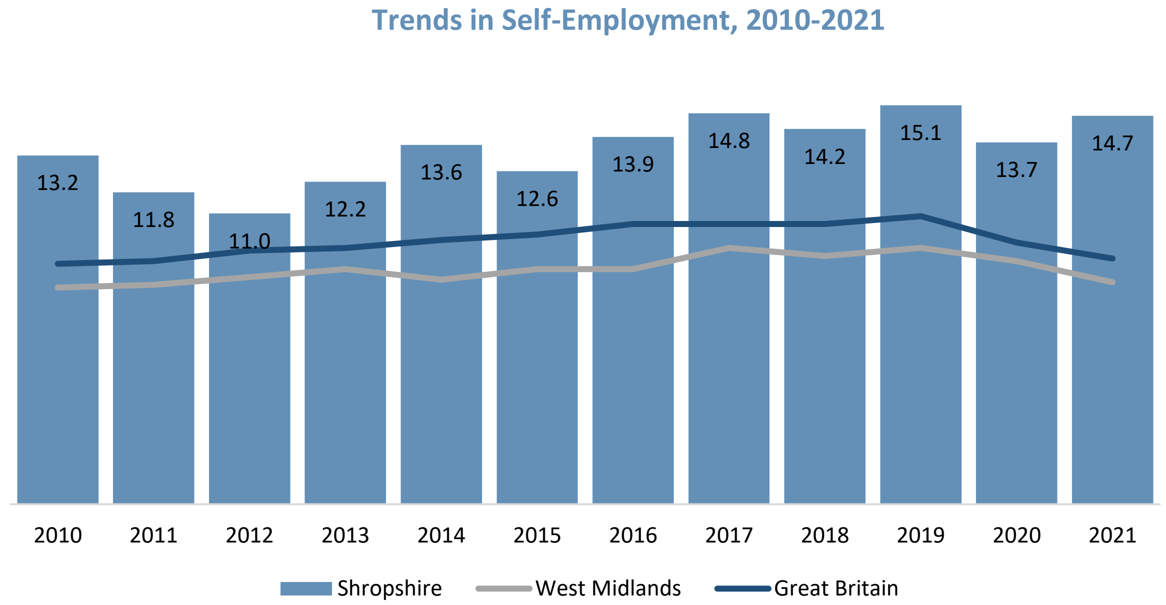
The majority of Shropshire residents in employment are employees, although self-employment in the county is significant, representing 14.7% in 2021. This equates with 26,600 self-employed people. As the following chart shows, while the number in self-employment has fallen slightly since the peak in 2017, since 2018 when overall employment levels peaked, the number self-employed has edged upwards (+700 people or +2.7%). In comparison, the decline in the number of employees has been acute (17,000 fewer employees, or a decline of 13.6%). This suggests that a proportion of workers may have become self-employed amid employment uncertainties during the pandemic.

Number of Employees vs Number Self-Employed in Shropshire, 2010 - 2021



Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

While the proportion attributable to self-employment has fluctuated somewhat over the last decade, it has consistently accounted for a higher proportion of those in employment than in either the West Midlands or Great Britain.



Source: ONS Annual Population Survey 2021, Year ending December, © Crown Copyright 2022

Home working in Shropshire is more common than in many places – at the time of the 2011 Census, 20,252 people said that their main work base was home, which is more than 1 in six people who were in employment at the time. This compares with about a tenth of the workforce in the West Midlands and England who were primarily working from home at this time. Working from home has become more commonplace because of the pandemic, when all workers were instructed to work from home if possible during the national and local lockdowns. Once the 2021 Census results are released, it is expected that a very high proportion of people will have reported that their home is their main place of work.

Self-Employment Income Support Scheme (SEISS)

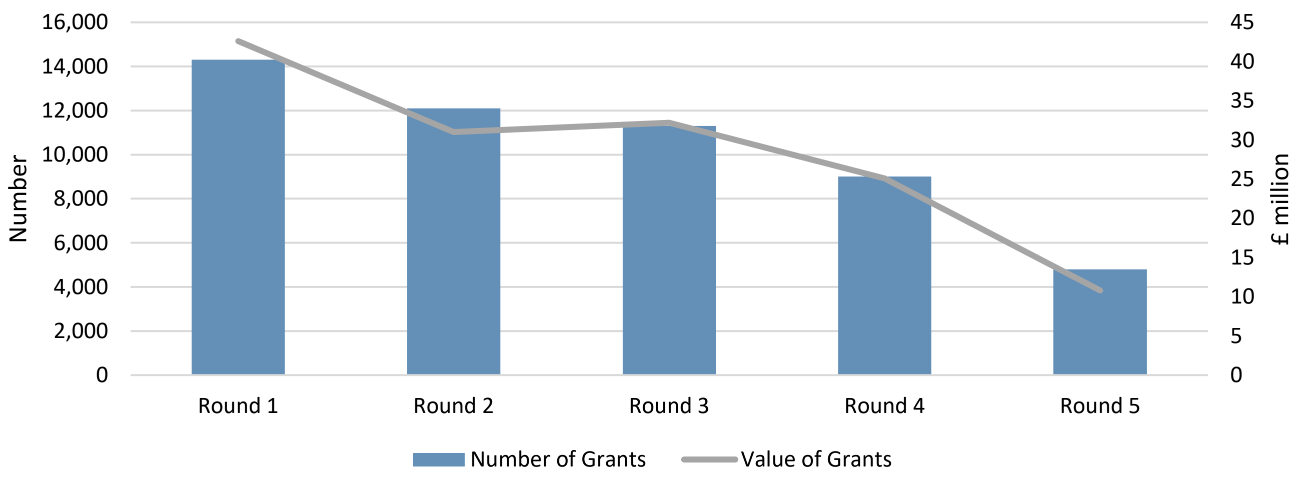
The Government implemented five rounds of grants aimed at supporting the country's self-employed workers, running from April 2020 to October 2021. The five rounds took place according to the following schedule:

- Round 1: to mid-July 2020
- Round 2: to end October 2020
- Round 3: to 29th January 2021
- Round 4: to 30th April 2021
- Round 5: to end September 2021

The following chart shows the number and value of grants awarded in each round in Shropshire. Overall, across the five rounds:

- 51,500 grants awarded
- 15,700 applicants (81% of those eligible)
- £141.7 million in total
- Average number of grants per applicant: 3.3
- Average value of support per applicant: £9,025

Self-Employment Income Support Scheme Grants

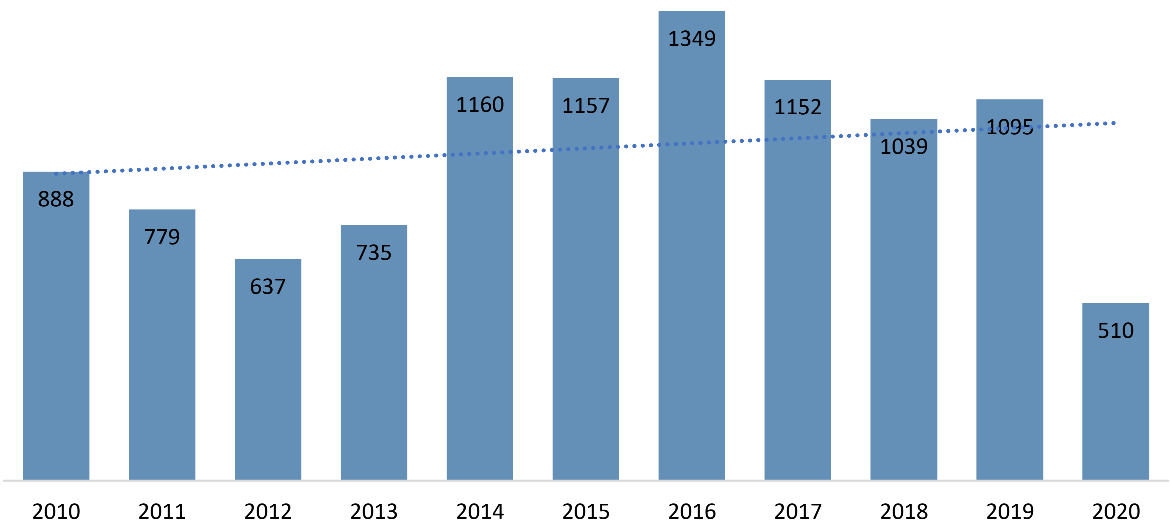


Source: HMRC

Migrant Workers

Adult overseas nationals entering the UK are allocated a National Insurance Number (NINo). Between 2010 and 2020, more than 10,000 NIN0's were issued in Shropshire, which is an average annual 955. Overall, since 2010, the trend has been upwards, but the number issued in 2020 halved in comparison with the number issued in 2019. Both Brexit and the global COVID-19 pandemic are likely to have influenced this drop.

NIN0 Allocations in Shropshire, 2010-2020



Source: DWP NINo's to Overseas Nationals

Commuting & Travel to Work

Travel to work data provided by the 2011 Census is now more than a decade out-of-date, and the 2021 origin and destination of the workforce statistics are unlikely to be published by ONS until late 2022/early 2023. While the data relating to 2021 should provide some useful indication on how work patterns have changed over the last 10 years, the timing of the latest Census (March 2021) during the country's third national lockdown will undoubtedly skew the data and make it more challenging to identify true changes in how and where the population works.

Key points for the 2011 Census relating to commuting and travel to work include:

- Much higher usage of cars as the main means of travelling to work, and conversely less use of public transport
- Higher levels of home working – roughly one in six workers compared to one in ten in the West Midlands and England
- Longer average commute, and more people travelling substantial distances to their place of employment compared with national norms, especially for the most highly qualified resident workers
- Relatively high levels of employment self-containment – 70.5% of Shropshire residents who worked were employed within the county (origin self-containment), and 73.8% of Shropshire jobs were filled by residents of the county (destination self-containment).
- More resident workers than jobs, leading to net out-commuting of 5,313 people.
- However, a significant reduction in the level of net out-commuting since the 2001 Census, due to only a slight rise in the number of out-commuters compared with a substantial increase in the number of in-commuters
- A significant proportion of cross-boundary commuting is with Telford & Wrekin

More information of commuting patterns as shown by the 2011 and 2001 Census can be found by following the link below.

commuting-patterns-and-travel-to-work.pdf (shropshire.gov.uk)

Unemployment

The Annual Population Survey suggests that 2.2% of the Shropshire population aged 16-64 was unemployed in the year ending December 2021. This compares with 5.2% in the West Midlands and 4.5% in Great Britain. It also represents a significant reduction from the previous year when the Shropshire rate stood at 4.3%. However, it should be noted that the Shropshire sample size in 2021 was below the threshold for which ONS will report a confidence interval, and as such, the data cannot be judged to be robust.

Benefit Claimants

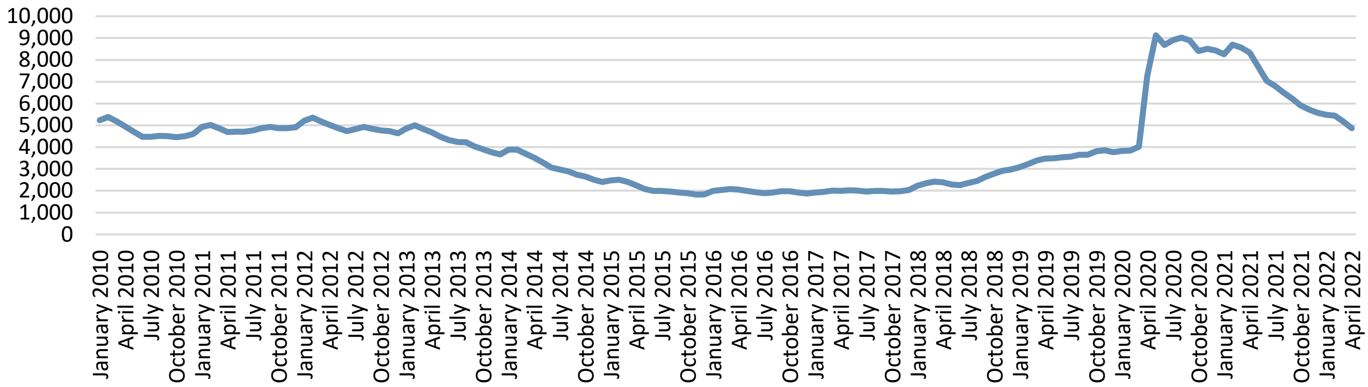
Claimant Count

The Covid-19 pandemic has had a marked impact on the number of people claiming out-of-work benefits. Numbers on the claimant count[4] rose particularly sharply in May and June 2020 when the country was in its first national lockdown. Subsequently, the trend has been downwards, especially over the last year.

In April 2022, there were 4,870 people on the claimant count in Shropshire, which represents a decline of 41.5% over the same month in 2021. Despite this, the count remains elevated compared with pre-pandemic norms, with the number 21.4% higher in April 2022 than it was in March 2020. In the West Midlands, the increase in claimants over the same period was 30.4% while nationally it was 30.5%.

Generally, rural locations which have historically had low levels of claimants saw numbers rise more rapidly than urban localities. However, numbers have fallen more rapidly in rural areas.

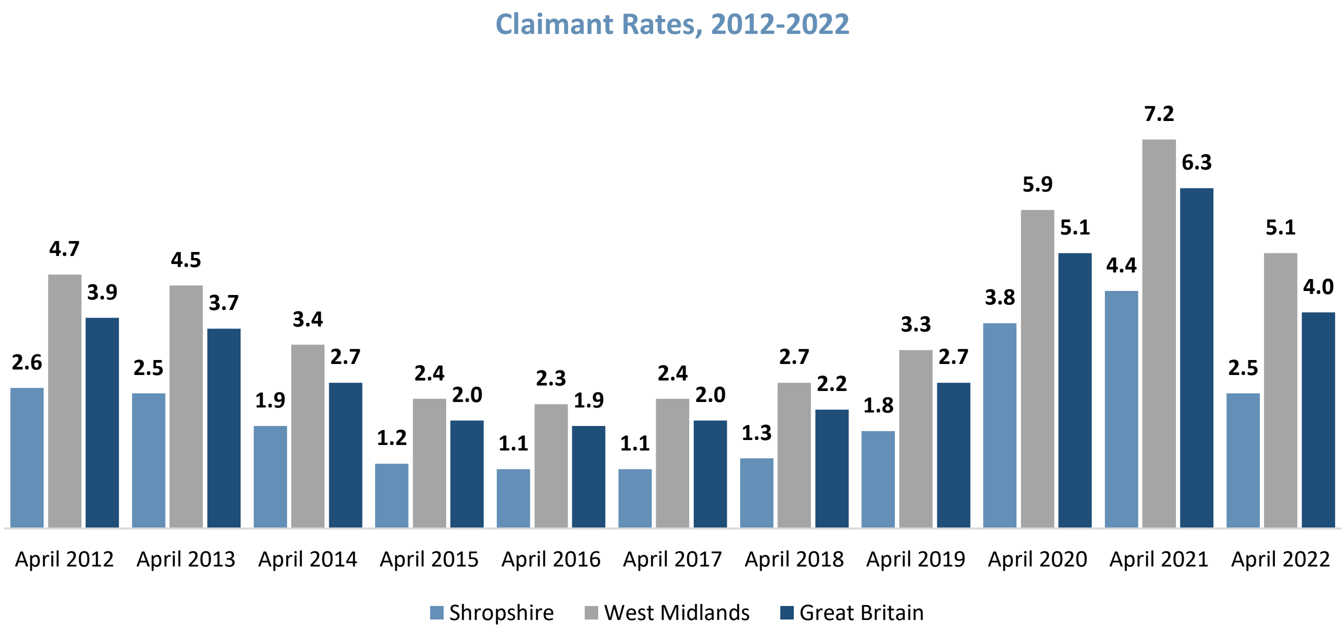
Number on the Shropshire Claimant Count



Source: ONS/DWP

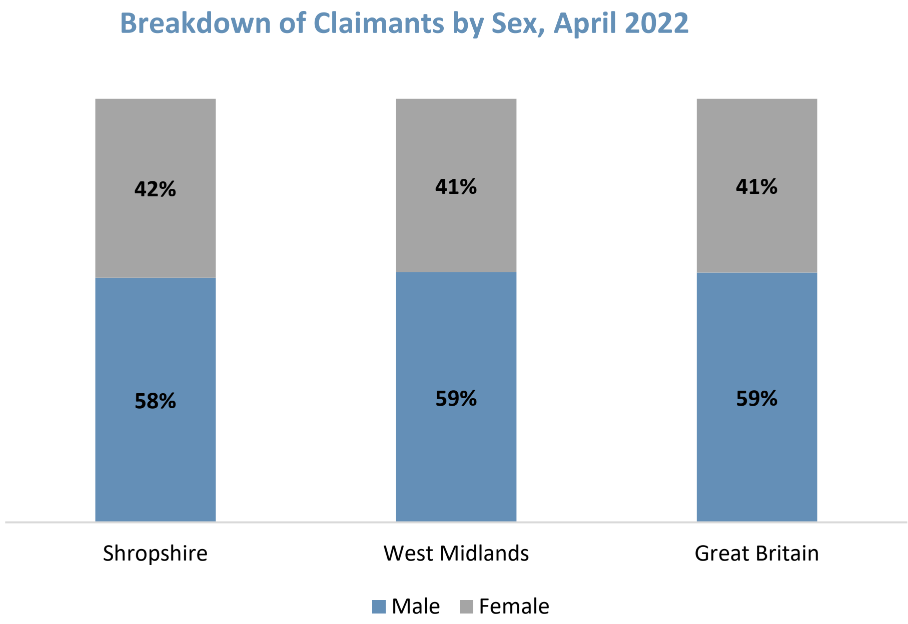
The following chart shows the proportion of the adult population which was on the claimant count every April since 2012. It shows that Shropshire's rate is consistently lower than the rates in the West Midlands and Great Britain. Standing at 2.5% in April 2022, this compares favourably with 4.4% in 2021, but is higher than the 2019 rate of 1.8%. The claimant rate in Shropshire has been as low as 1.1% in Shropshire (April 2016 and 2017).

[4] Those who are claiming benefit for the principal reason of being out of work and who are actively seeking employment



Source: ONS/DWP

Nationally, 58% of all claimants are male. This proportion is the similar in the West Midlands and Great Britain.

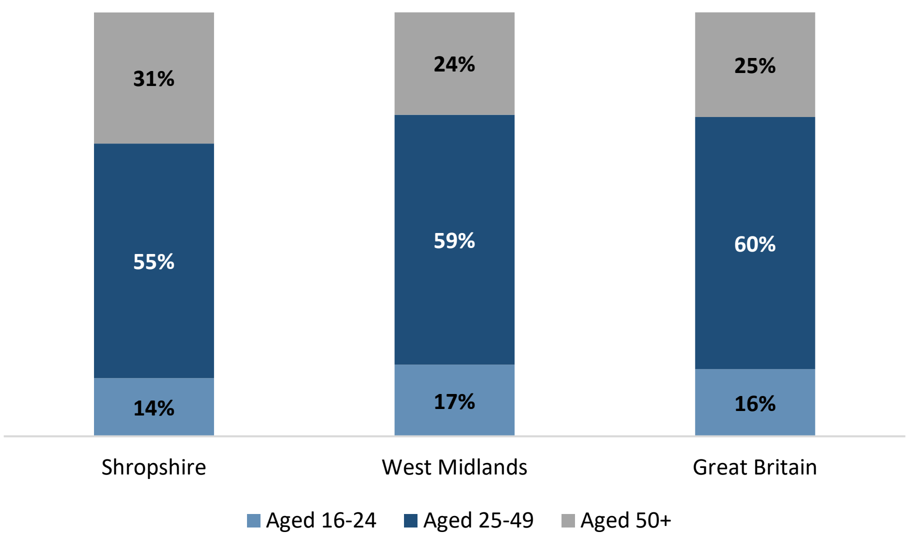


Source: ONS/DWP

2.9% of male adults are on the claimant count compared with 2.2% of females.

14% of all claimants in Shropshire are below the age of 25, which is a marginally lower proportion than in the West Midlands (17%) and Great Britain (16%). 25–49-year-olds also account for a smaller share of the total than they do regionally or nationally, but still account for the majority (55% in Shropshire compared with 59% in the West Midlands and 60% in Great Britain). This means that over 50s account for a disproportionately high share of all claimants in Shropshire, at 31% compared with 24% in the West Midlands and 25% in Great Britain.

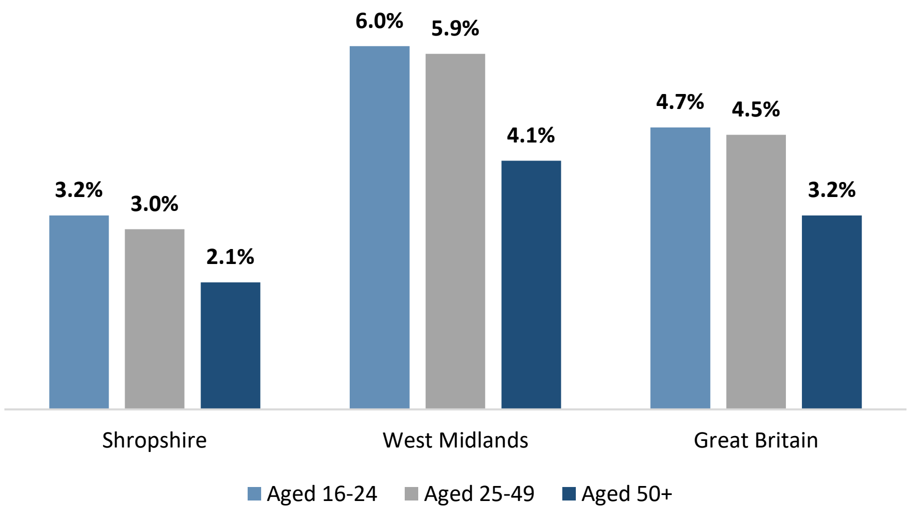
Breakdown of Claimants by Age, April 2022



Source: ONS/DWP

Analysing claimant rates by age band shows that as a proportion of the cohort, there are more young claimants than there are in older age brackets. In April 2022, 3.2% of all Shropshire 16–24-year-olds claimed compared with 6.0% in the West Midlands and 4.7% in Great Britain. The proportion of 16–24-year-olds claiming has more than halved since its peak of 8.8% in July 2020. The rates amongst the 25-49 and 50+ ages are also lower in Shropshire than in the West Midlands or Great Britain.

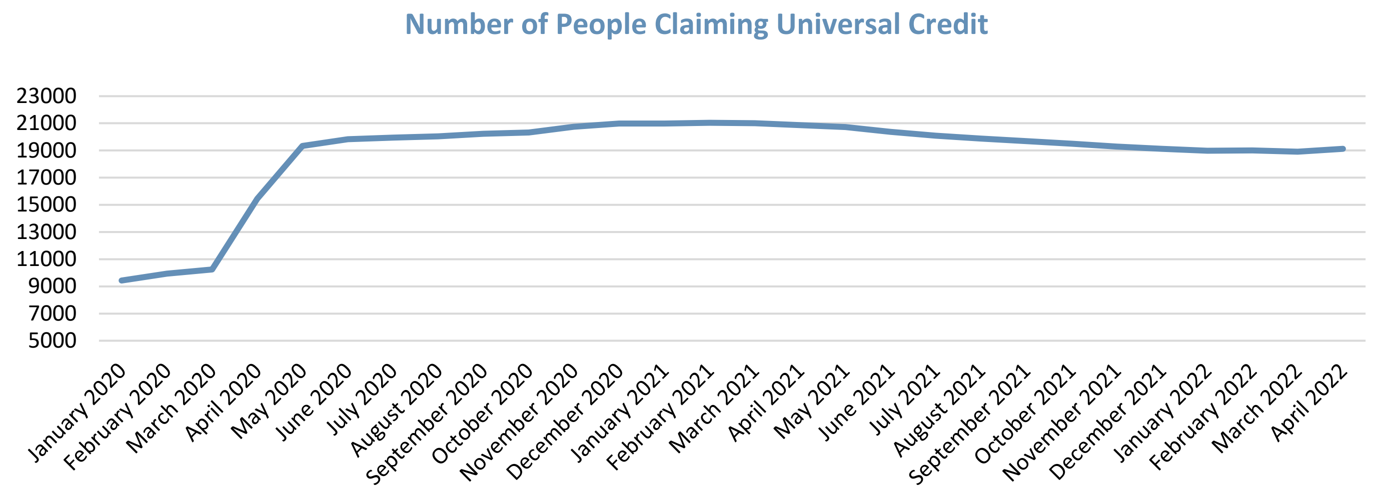
Claimant Rates by Age, April 2022



Source: ONS/DWP

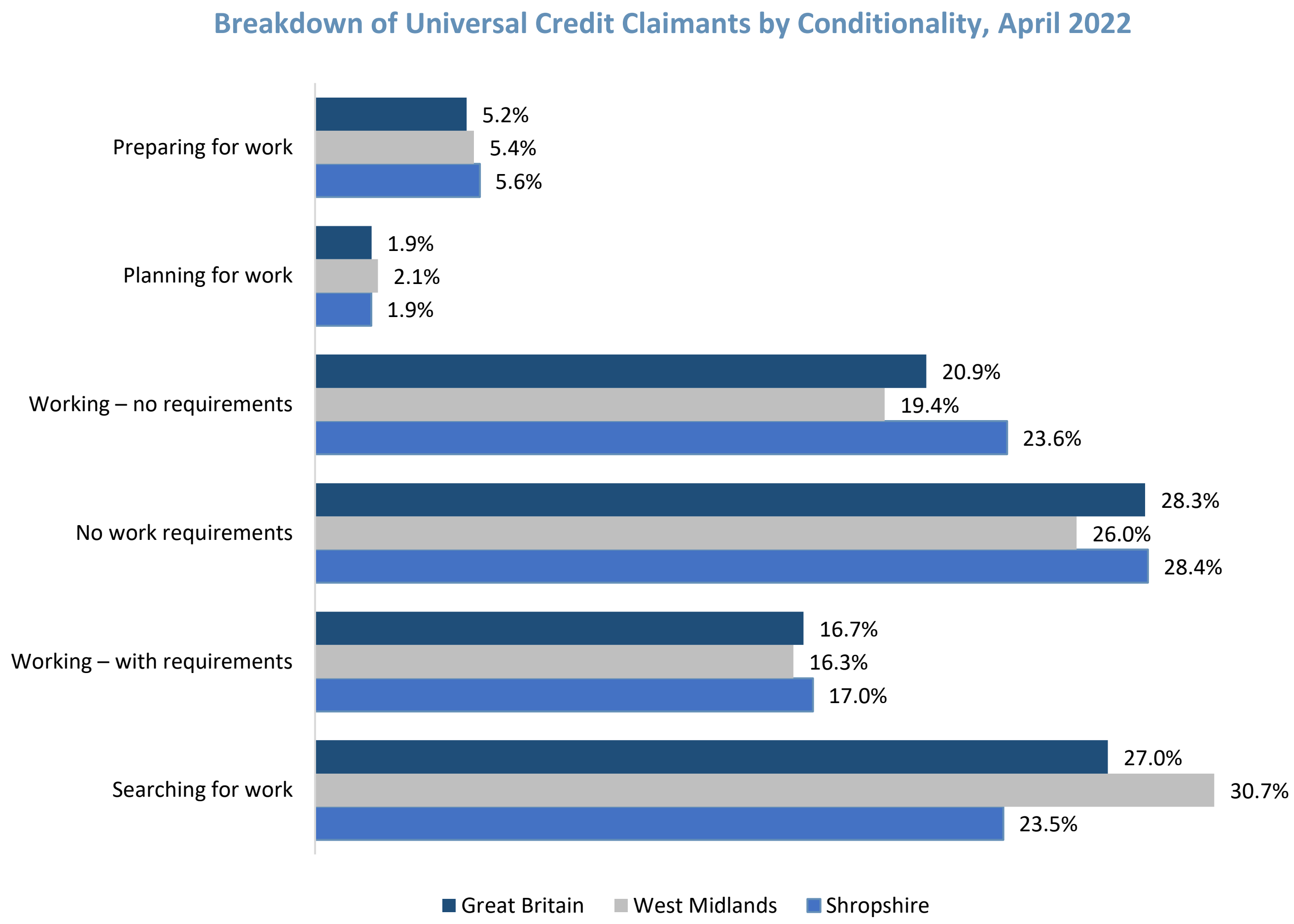
Universal Credit

The number of people claiming universal credit in Shropshire rose steeply at the start of the pandemic, more than doubling between January 2020 and August 2020. The number peaked at 21,021 in March 2021. Whilst it has fallen back slightly in recent months, the decline in universal credit recipients has been slow, as illustrated in the chart below. In April 2022, there were 19,129 claimants – 8,880 more than in March 2020 (86.6% higher).



Source: DWP

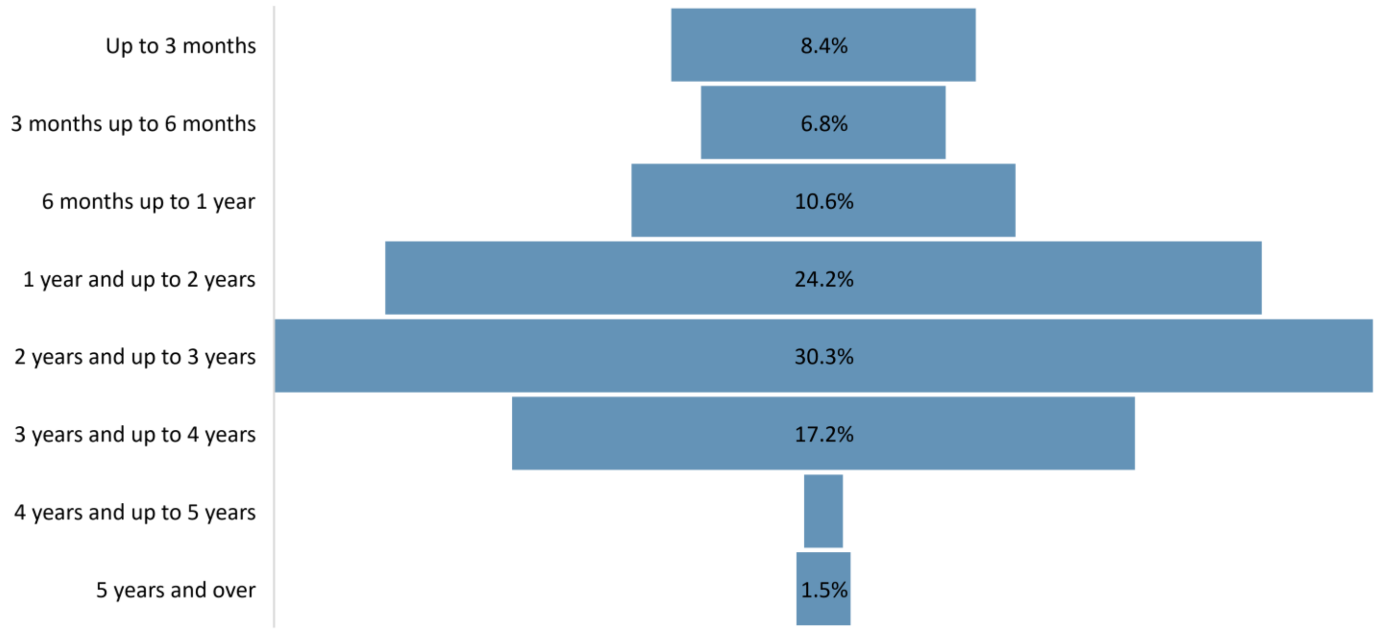
The chart below shows that 23.5% of Shropshire universal credit claimants were searching for work in April 2022. This is a lower proportion than in the West Midlands (30.7%) or Great Britain (27.0%). A further 5.6% were preparing for work while 1.9% were planning for work. Just over 40% were working (23.6% with no requirements and 17.0% with requirements), while 28.4% were not required to work or seek employment.



Source: DWP

The data shows that only a minority of claimants had been claiming for four years of more. More than half (54.5%) had been claiming for between one and three years and as such many will have started claiming during the pandemic. More than a quarter of claimants had been claiming for less than a year.

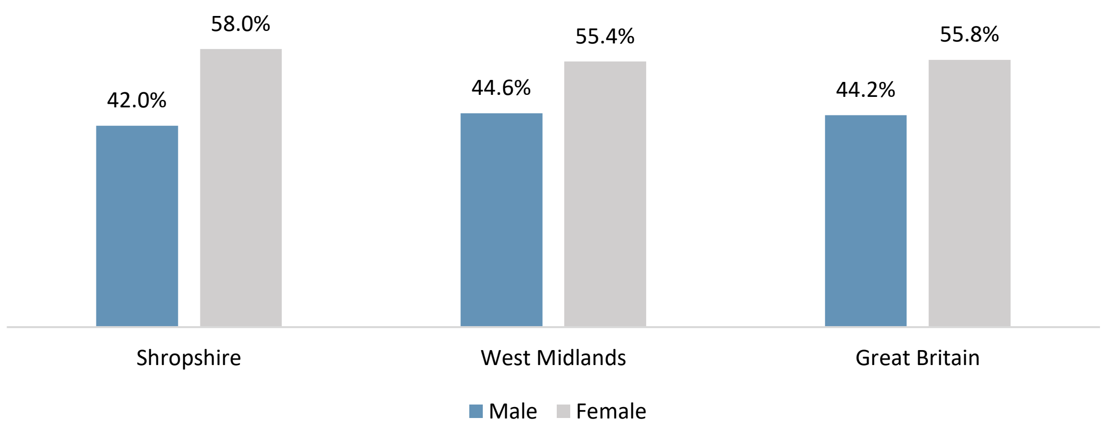
Length of Time Claiming, April 2022



Source: DWP

Unlike the claimant count, where the majority of claimants are male, there are more women claiming universal credit than men, at 58% of the total in Shropshire. This proportion is higher than it is in the West Midlands (55.4%) or Great Britain (55.8%).

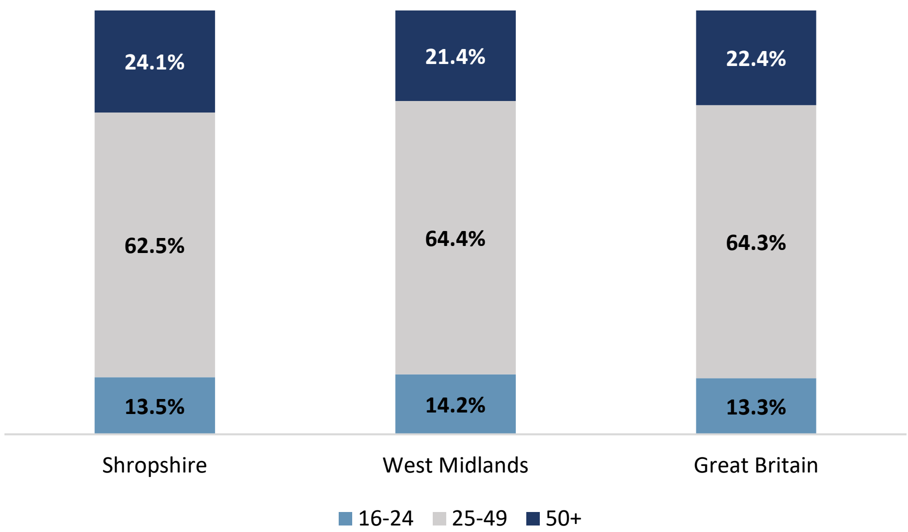
Breakdown of Universal Credit Claimants by Gender, April 2022



Source: DWP

The age profile of universal credit claimants in Shropshire is similar to regional and national averages, although a lightly lower proportion if attributable to the 25-49 age band. There are relatively more younger claimants in the West Midlands and Great Britain and more claimants aged 50+ in Shropshire.

Breakdown of Universal Credit Claimants by Age, April 2022



Source: DWP

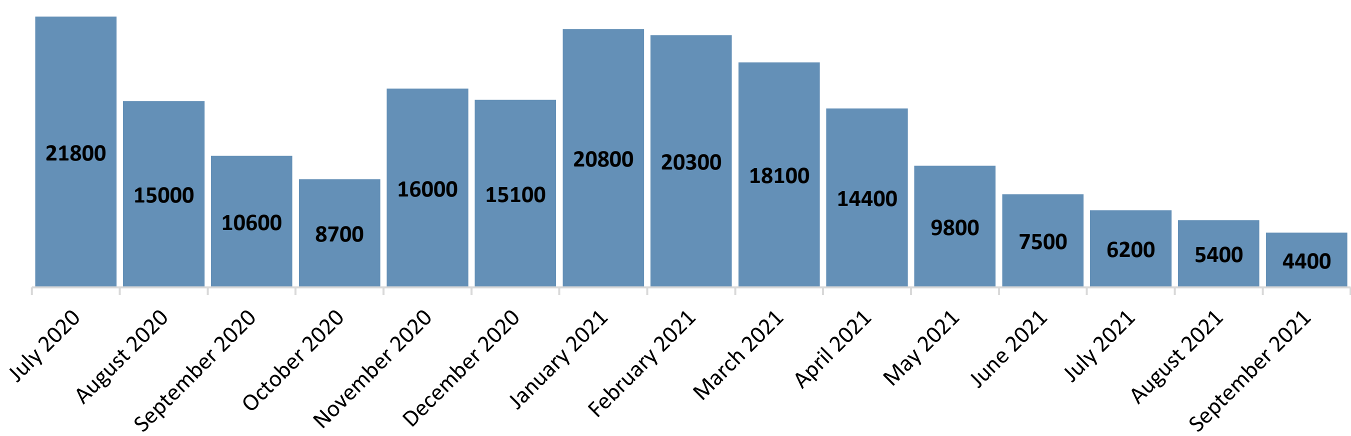
There were 15,957 households in Shropshire in February 2022 on universal credit. Of these, 47.3% of households contained at least one child.

Coronavirus Job Retention Scheme

The Government introduced the Coronavirus Job Retention Scheme at the start of the first national lockdown to protect jobs while non-essential businesses were unable to trade.

51,300 Shropshire employments were furloughed at some point between April 2020 up to September 2021 when the CJRS ended. At any one point, the number of employments that were furloughed was likely to have been highest at the start of the pandemic when lockdown rules were particularly strict. HMRC only began to issue monthly data in July 2020, and in this month, 21,800 employments in Shropshire were furloughed, which is the equivalent of 15% of all employments. The number on the CJRS fell between August 2020 and October, when the country began to open, rose again in November during the second national lockdown and increased again at the start of 2021 when the third national lockdown was initiated. Since the beginning of 2021, numbers have declined each month, although 4% of all eligible employments were still furloughed when the scheme closed.

Number of Shropshire Employments Furloughed by Month

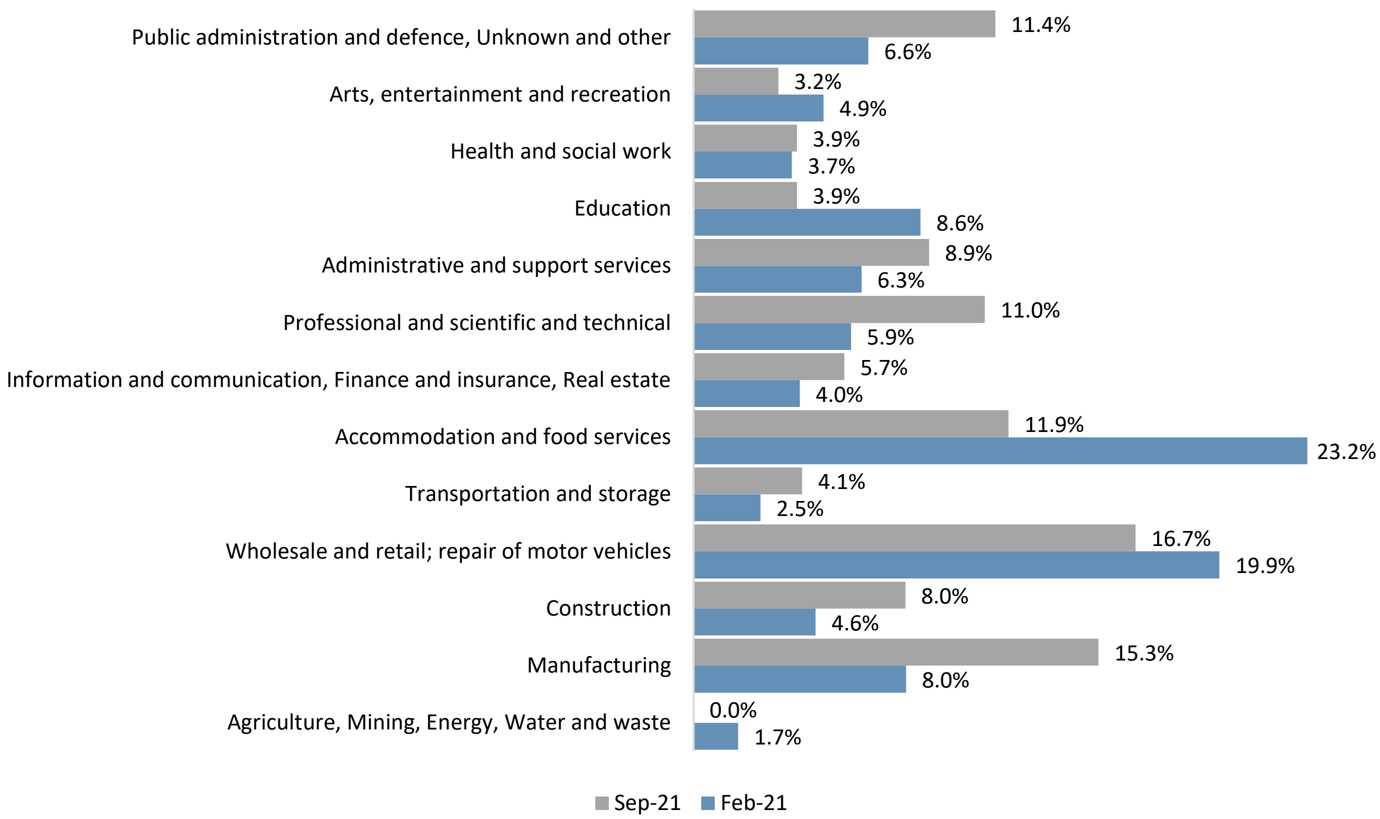


Source: HMRC

In January 2021, more than 3,000 businesses located in Shropshire had at least one employee on the CJRS. This number had fallen to less than 1,400 by September 2021 (Source: Beauhurst business directory, 2022).

From February 2021, HMRC began to report the number of employments furloughed according to sector. This shows that in February, when the country was in lockdown, the most impacted sector was the accommodation and food services sector, which accounted for 23.2% of all furloughed employments. Wholesale, retail and the sale and repair of motor vehicles also accounted for a significant proportion of total furloughs. By September, when the CRJS was about to end, around a fifth of remaining furloughs were in the wholesale, retail and motor trades sector, while the proportion attributable to the accommodation and food services sector had fallen to 11.9%. In September 2021, manufacturing accounted for 15.3% of remaining furloughs.

Breakdown of Furloughs by Sector, February & September 2021



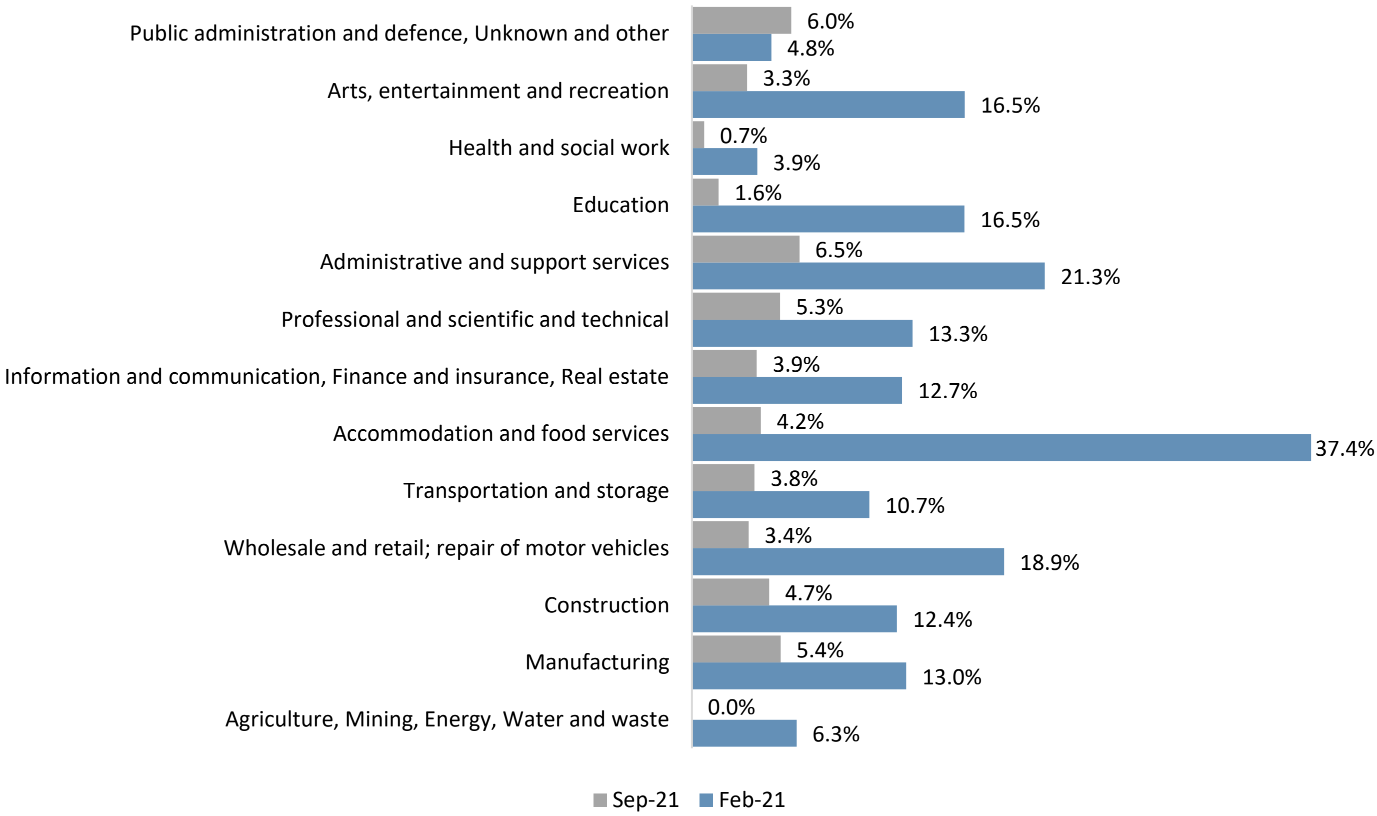
Source: HMRC

The following chart shows the proportion of employments in each sector which were furloughed in February and September 2021. Across all sectors (except public administration and defence and other service sectors), the proportion fell significantly between February and September as the CJRS was being wound up.

In February, significantly more than a third of jobs in the accommodation & food services sector were furloughed – this proportion had fallen to less than 5% at the end of September. In February, more than a fifth of administration jobs were furloughed, as well as more than 15% in education, arts, entertainment & leisure and wholesale, retail and motor trades.

By September, the highest proportion of jobs were furloughed in public administration, defence and other services, ahead of administration & support services, manufacturing and construction.

Proportion of Eligible Employments Furloughed by Sector, February & September 2021



Source: HMRC

Note: Shropshire-based employments by sector used to calculate percentages. HMRC data relates to the home postcode of the person furloughed, so not all Shropshire residents that were furloughed will work within the local authority boundary.

Qualifications and Occupations

Qualifications

41.5% of Shropshire residents aged 16-64 are qualified to at least NVQ level 4. This is the equivalent of 74,900 people. The proportion qualified to this level is slightly higher than the regional average, but is somewhat lower than the national percentage of 43.5%. Relatively few Shropshire residents have no qualifications at all – just 8,300 people, which is the equivalent of 4.6% of the 16-64 population. This compares favourably with 6.6% nationally and 7.7% in the West Midlands.

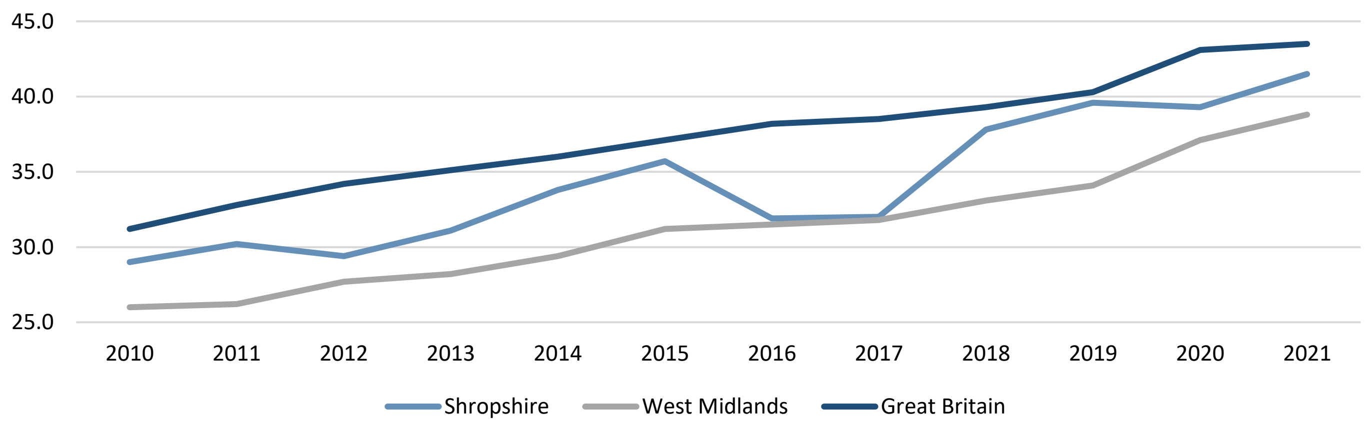
Highest Level of Qualification Held, 2021

	Shropshire	West Midlands	Great Britain
NVQ Level 4+	41.5%	38.8%	43.5%
NVQ Level 3	19.2%	18.4%	18.0%
NVQ Level 2	16.1%	18.0%	16.7%
NVQ Level 1	10.9%	9.7%	9.4%
Other Qualification	7.7%	7.4%	5.9%
No Qualifications	4.6%	7.7%	6.6%

Source: Annual Population Survey, year ending December 2021, © Crown Copyright 2022

The proportion of the population qualified to NVQ level 4 or above has risen steadily across the country over the last decade. The same is true in Shropshire, albeit with some annual fluctuations that have been more pronounced than has been the case either regionally or nationally. The proportion in Shropshire rose from 29.0% in 2010 to 41.5% in 2021, which is the equivalent of an additional 21,600 educated to this level.

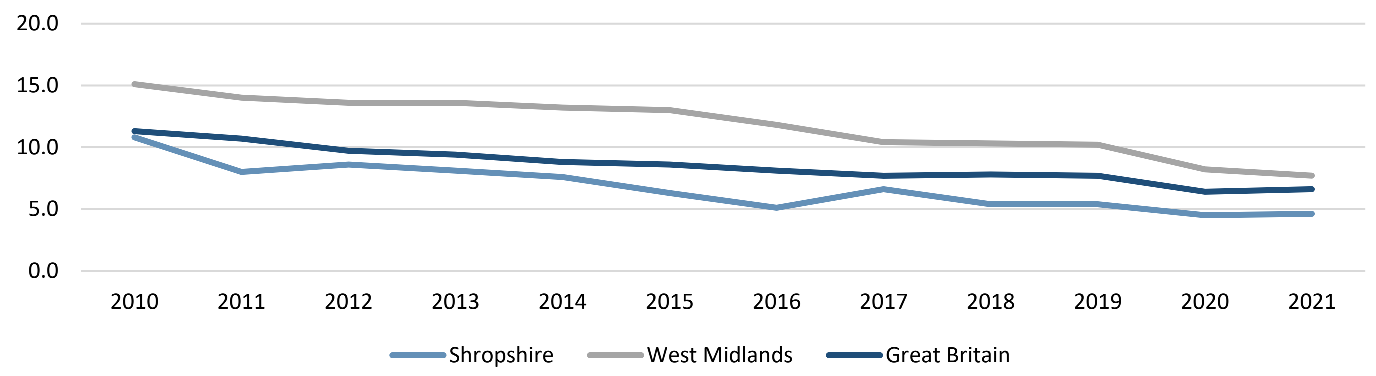
Growth in the Proportion of the Population with NVQ Level 4+ Qualifications, 2010-2021



Source: Annual Population Survey, year ending December 2021, © Crown Copyright 2022

The number of Shropshire residents aged 16 to 64 with no formal qualifications fell by 11,500, or by 58.1% between 2010 and 2021 to 8,300 people. Over the same period, the proportion of the population with no qualifications declined from 10.8% to 4.6%.

Decline in the Proportion of the Population with No Qualifications, 2010-2021



Source: Annual Population Survey, year ending December 2020, © Crown Copyright 2022

Occupations

Approaching half of the resident workforce in Shropshire is employed in standard occupational classifications (SOC) 1-3, which is a comparable proportion to the national average and slightly higher than the regional average. The proportion employed in SOC 4-7 and SOC 8-9 is also very similar in Shropshire to the national average.

Breakdown of Resident Workforce by Occupational Classification, 2021

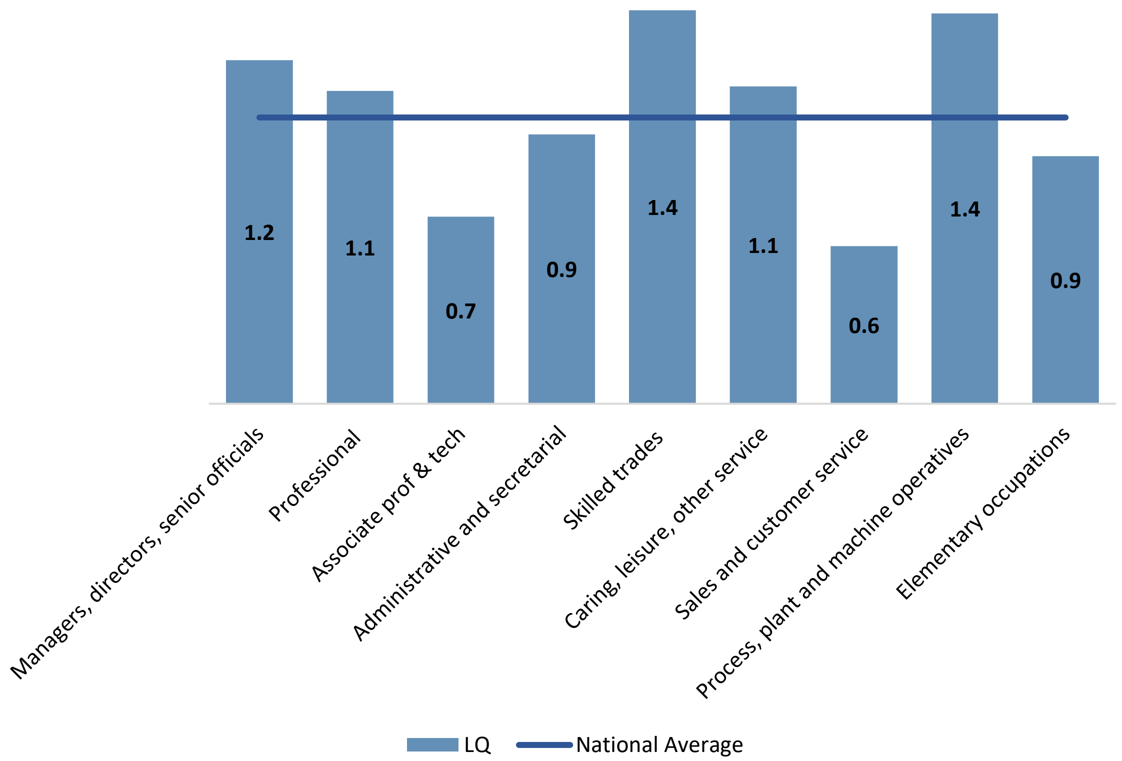
	Shropshire	West Midlands	Great Britain
Managers, Directors & Senior Officials	12.6%	9.6%	10.5%
Professional Occupations	25.9%	22.6%	23.7%
Associate Professional & Technical Occupations	10.0%	14.0%	15.3%
SOC 1-3	**48.5%**	**46.2%**	**49.5%**
Administrative & Secretarial Occupations	9.6%	10.2%	10.2%
Skilled Trades Occupations	12.1%	8.9%	8.8%
Caring, Leisure & Other Service Occupations	10.2%	9.7%	9.2%
Sales & Customer Service Occupations	3.8%	6.6%	6.9%
SOC 4-7	**35.7%**	**35.4%**	**35.1%**
Process, Plant & Machine Operatives	7.5%	7.1%	5.5%
Elementary Occupations	8.3%	11.1%	9.6%
SOC 8-9	**15.8%**	**18.2%**	**15.1%**
Total	100.0%	100.0%	100.0%

Source: Annual Population Survey, year ending December 2021, © Crown Copyright 2022

The following chart shows the relative importance of different occupations to Shropshire compared to the national average using location quotients. Although the proportion employed in a SOC 1-3 capacity is similar in Shropshire compared to Great Britain, there are relatively more managers, directors and senior officials and relatively few employed in associate professional and technical occupations.

Shropshire supports proportionately more skilled trades occupations and those working as process, plant and machine operatives and fewer in sales and customer service.

Occupational Significance by Location Quotient, 2021



Source: Annual Population Survey, year ending December 2021, © Crown Copyright 2022

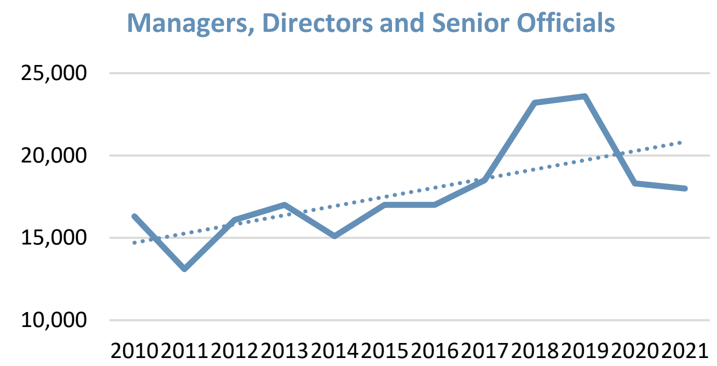
Since 2010, the number of Shropshire residents employed in SOC 1-3 professions has risen by 13,300. Meanwhile, the number employed in SOC 4-7 and SOC 8-9 occupations has fallen by 12,300 and 4,600 respectively.

Change in Resident Workforce by Occupation, 2010-2021

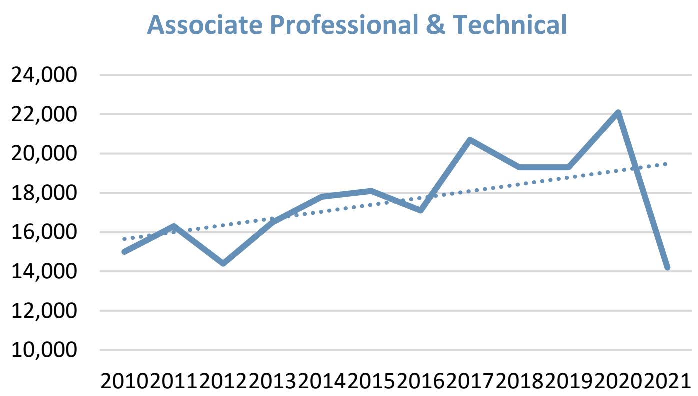
	Shropshire
Managers, Directors & Senior Officials	+1,700
Professional Occupations	+12,400
Associate Professional & Technical Occupations	-800
SOC 1-3	**+13,300**
Administrative & Secretarial Occupations	-3,400
Skilled Trades Occupations	-5,700
Caring, Leisure & Other Service Occupations	+2,300
Sales & Customer Service Occupations	-5,500
SOC 4-7	**-12,300**
Process, Plant & Machine Operatives	-700
Elementary Occupations	-3,900
SOC 8-9	**-4,600**
Total	-3,600

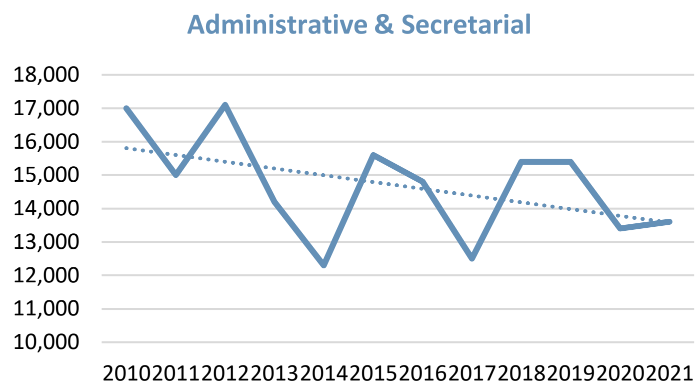
Source: Annual Population Survey, year ending September 2021, © Crown Copyright 2022

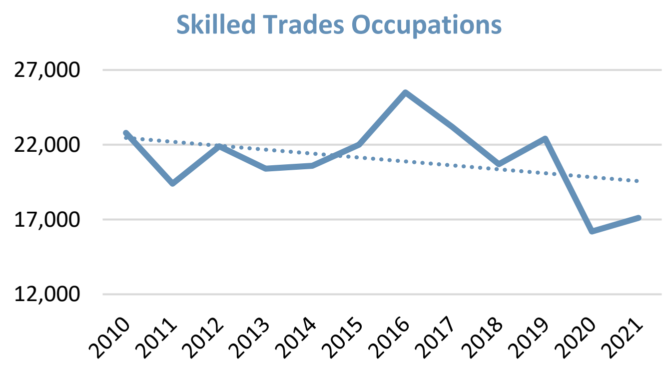
Overall growth and decline can disguise annual fluctuations in the numbers employed in each profession. The following charts show yearly trends for each occupation with a smoothed trend line. This shows that the strongest upward trends are in managers, directors and senior officials, associate, professional and technical (despite a steep decline in 2021) with a more moderate upward shift for professional occupations and caring and leisure. All other occupations are showing a downward trend.

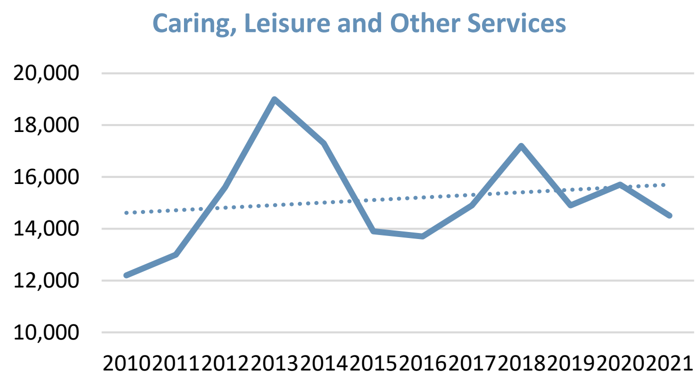

Managers, Directors and Senior Officials
25,000
20,000
15,000
10,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

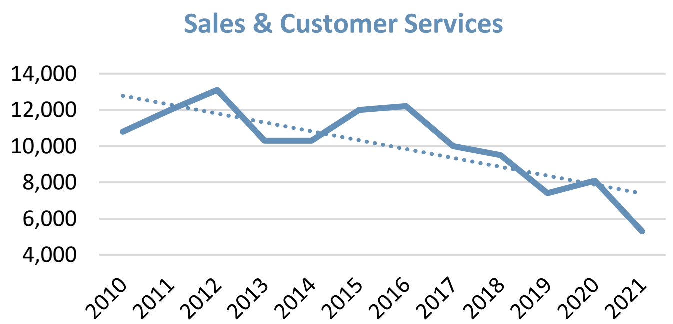

Professional Occupations
40,000
35,000
30,000
25,000
20,000
15,000
10,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

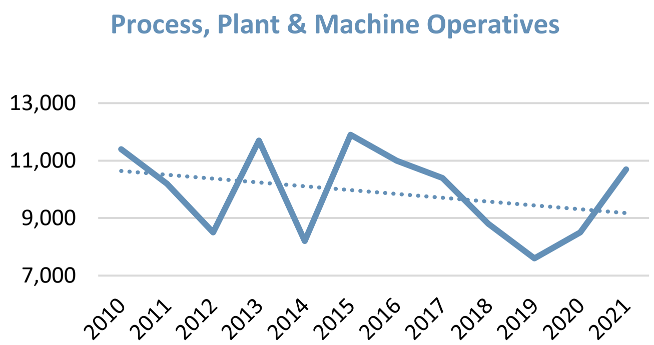

Associate Professional & Technical
24,000
22,000
20,000
18,000
16,000
14,000
12,000
10,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

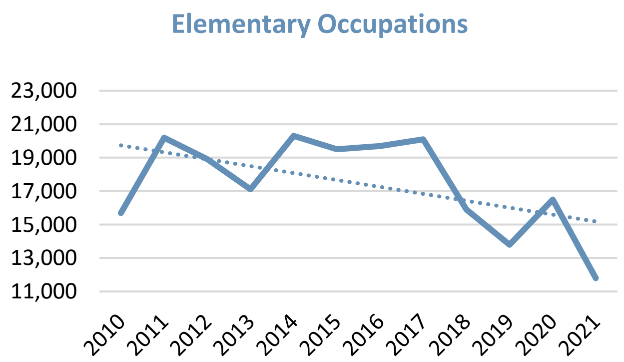

Administrative & Secretarial
18,000
17,000
16,000
15,000
14,000
13,000
12,000
11,000
10,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021


Skilled Trades Occupations
27,000
22,000
17,000
12,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021


Caring, Leisure and Other Services
20,000
18,000
16,000
14,000
12,000
10,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

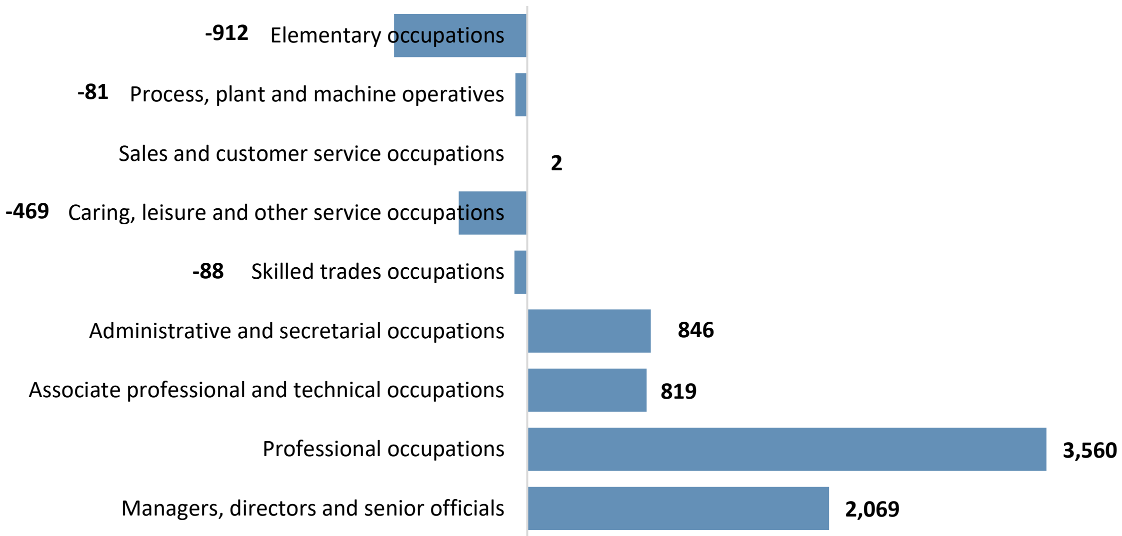

Sales & Customer Services
14,000
12,000
10,000
8,000
6,000
4,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021


Process, Plant & Machine Operatives
13,000
11,000
9,000
7,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021


Elementary Occupations
23,000
21,000
19,000
17,000
15,000
13,000
11,000
2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021

Although out-dated, it is interesting to consider Census 2011 data showing the difference between resident workers and those employed within Shropshire by occupational classification. It is evident that in 2011, there was a significant over-supply of SOC 1-3 occupations within the resident population. In contrast Shropshire was more reliant on in-commuters to fulfil demand in elementary occupations and in caring and leisure.

Difference between the Resident and Workplace Population by Occupation, 2011



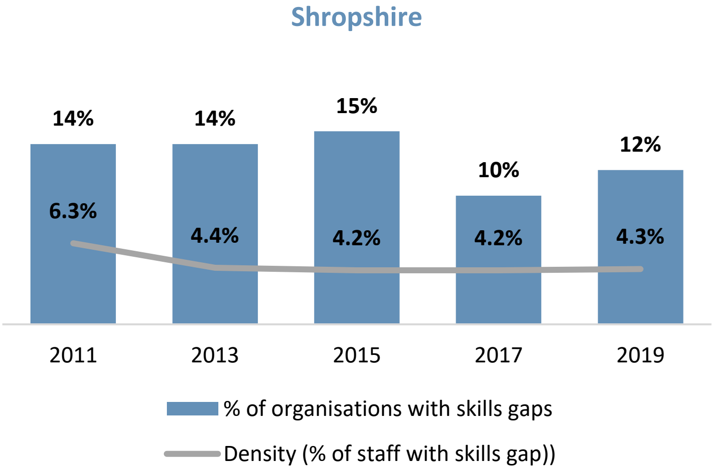
Source: ONS 2011 Census, © Crown Copyright 2022

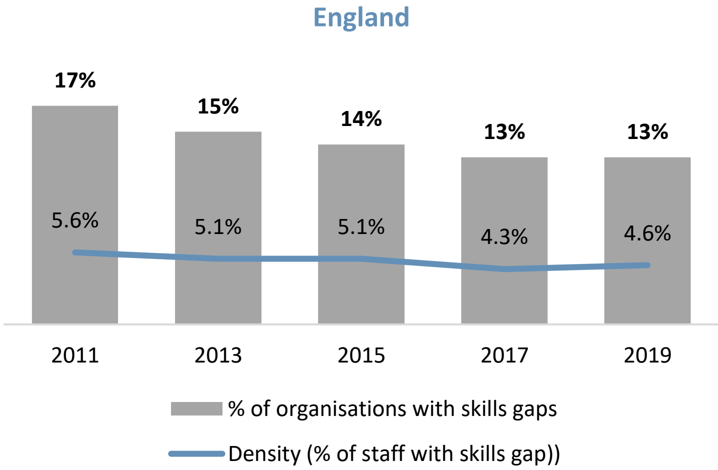
Skills Gaps

The prevalence of skills gaps is captured by the biennial Employer Skills Survey, the latest of which took place in 2019. At this time, the proportion of employers reporting at least one member of staff who was not fully proficient in the role for which they were employed stood at 12% compared with 13% in England. Since 2011, the proportion of Shropshire employers who claim to have a fully proficient workforce has ranged from 85% to 90%.

As a proportion of total staff, those who have a skills gap has been just over 4% in Shropshire since 2013. This proportion is very slightly higher in England.

Incidence and Density of Skills Gaps, 2011-2019





Source: Employer Skills Survey, 2019

The following tables show the types of skills that employers which have skills shortage vacancies require. Specialist skills and knowledge was the top technical skill in both Shropshire and England, while the ability to manage own time and prioritise was the top soft skill that was needed.

Technical/Practical Skills Shortages, 2019

	Shropshire	England
Specialist skills or knowledge	64%	68%
Solving complex problems	56%	44%
Knowledge of products and services	37%	44%
Knowledge of how your organisation works	32%	35%
Reading & understanding instructions, guidelines, manuals or reports	17%	31%
More complex numerical or statistical skills & understanding	38%	29%
Basic numerical skills and understanding	24%	26%
Writing instructions, guidelines, manuals or reports	28%	26%
Adapting to new equipment or materials	26%	24%
Manual dexterity	21%	21%
Computer literacy/basic IT skills	20%	21%
Advanced or specialist IT skills	15%	21%
Communicating in a foreign language	28%	14%
None of the above	15%	7%
Complex analytical skills	62%	52%
Operational skills	45%	51%
Digital skills	27%	32%
Basic skills	34%	36%

Source: Employer Skills Survey, 2019

Soft/People Skills Shortages, 2019

	Shropshire	England
Ability to manage own time and prioritise	65%	51%
Customer handling skills	44%	39%
Team working	38%	37%
Managing own feelings & feelings of others	42%	36%
Managing or motivating other staff	48%	34%
Persuading or influencing others	38%	30%
Sales skills	29%	25%
Instructing, teaching or training people	34%	25%
Setting objectives for others and planning human, financial or other resources	43%	24%
Making speeches or presentations	19%	16%
None of the above	23%	21%
Management & leadership	60%	49%
Sales & customer skills	46%	45%
Self-management skills	74%	58%

Source: Employer Skills Survey, 2019

63% of Shropshire employers expected to need to upskill their workforce over the next year, with legislative or regulatory requirements and the introduction of new technology or equipment the top two reasons.

Reasons for Expected Need for New Skills over Next 12 Months, 2019

	Shropshire	England
New legislative or regulatory requirements	46%	42%
The introduction of new technology or equipment	41%	41%
The development of new products & services	37%	35%
The introduction of new working practices	35%	35%
Increased competitive pressure	25%	22%
The UK's decision to leave the EU	17%	18%
General training/professional development	1%	2%
Other	1%	1%
None of the above	35%	30%
Any need for upskilling	63%	64%

Source: Employer Skills Survey, 2019

Employers were significantly more likely to consider managerial positions to be in need of new skills, with 62% of employers in Shropshire considering this profession most likely to be impacted. This compares to less than 10% for all other occupations.

Occupations that will be most affected by New Skills Needs, 2019

	Shropshire	England
Managers, directors & senior officials	52%	44%
Professionals	7%	8%
Associate Professionals	1%	4%
Administrative/Clerical Staff	5%	9%
Skilled Trades	8%	8%
Caring, Leisure & Other Service	2%	4%
Sales & Customer Services	3%	7%
Machine Operatives	3%	3%
Elementary Staff	5%	3%
Unknown	14%	10%

Source: Employer Skills Survey, 2019

The following table shows the main skills that employers expect their workforce to need developing over the next year.

Technical/Practical Skills that will Need Developing, 2019

	Shropshire	England
Specialist skills or knowledge	53%	50%
Knowledge of products and services	49%	48%
Adapting to new equipment or materials	55%	45%
Solving complex problems	37%	38%
Reading & understanding instructions, guidelines, manuals or reports	33%	30%
Knowledge of how your organisation works	20%	30%
Computer literacy/basic IT skills	40%	30%
Writing instructions, guidelines, manuals or reports	26%	23%
More complex numerical or statistical skills & understanding	12%	18%
Basic numerical skills & understanding	13%	16%
Manual dexterity	13%	14%
Communicating in a foreign language	10%	9%
None of the above	9%	11%
Complex analytical skills	44%	44%
Operational skills	52%	52%
Digital skills	51%	47%

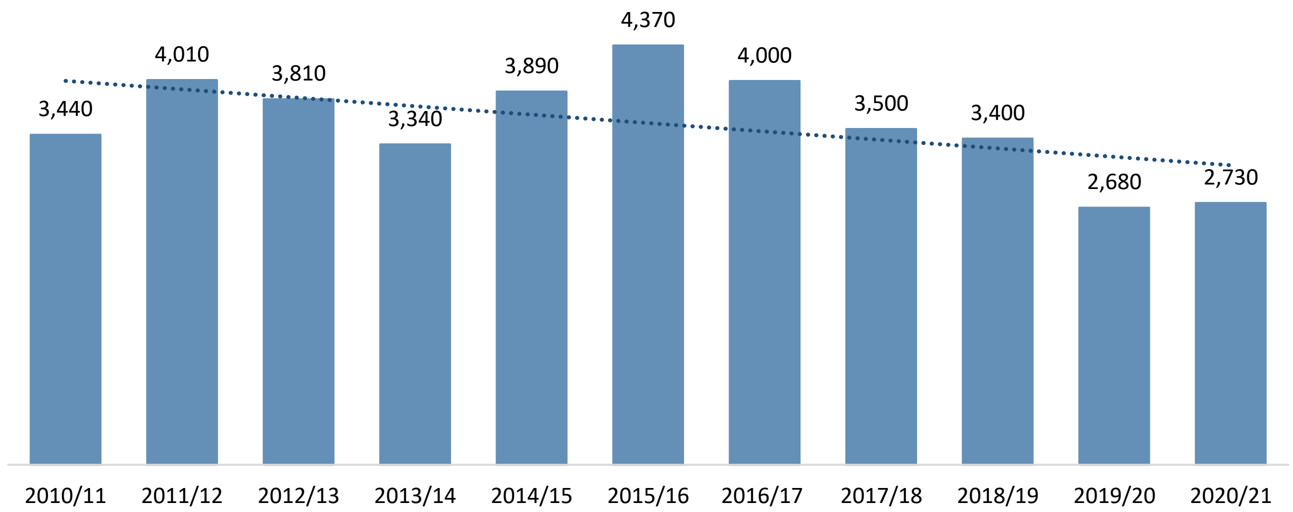
Source: Employer Skills Survey, 2019

Apprenticeships & Training

Apprenticeships

The number of apprenticeship starts in Shropshire has fallen since it peaked in 2015/16 albeit with a very slight increase in 2020/21 in comparison with the previous year.

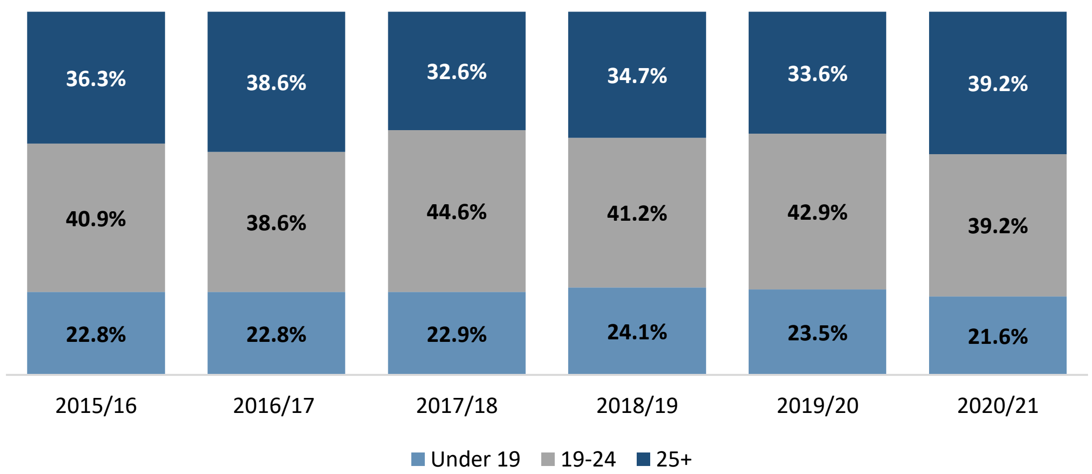
Number of Apprenticeship Starts, 2010/11 – 2020/21



Source: FE Apprenticeship Statistics

In 2020/21, 22% of apprenticeship starts were aged under 19, 39% were between 19 and 24 and a further 39% were 25 and above. The number of starts across all three age cohorts has declined since 2015/16. The number of under 19s starting an apprenticeship has fallen by 41% to 590. Starts by those aged 19-24 have fallen by 40.2% to 1,070. The same number of 25+ apprentices started in 2020/21, which represents a 32.7% decline since 2015/16.

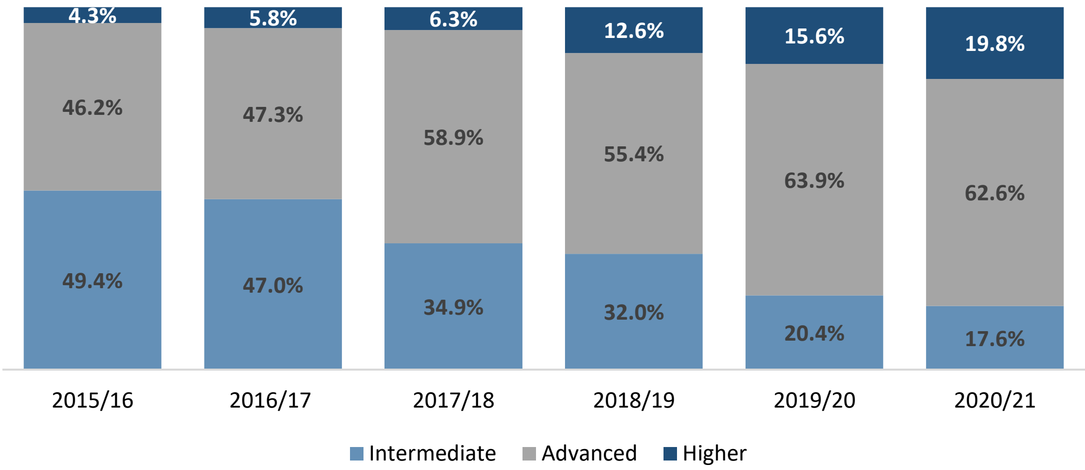
Breakdown of Apprenticeship Starts by Age, 2015/16 – 2020/21



Source: FE Apprenticeship Statistics

Looking at apprenticeship starts by level, there has been a very sharp decline in the number starting intermediary apprenticeships. Representing almost half of the total in 2015/16, numbers had fallen by more than three-quarters to 480 by 2020/21, which is just 17.6% of the total. The number of people starting advanced apprenticeships has also fallen, but much less dramatically (-15%) – these now account for 62.6% of all starts compared with 46.2% in 2015/16. Meanwhile, there has been a very sharp rise in the number taking higher apprenticeships – accounting for less than 5% of apprenticeship starts in 2015/16, these accounted for just under a fifth in 2020/21 with starts having jumped up from 190 to 540 (+184%).

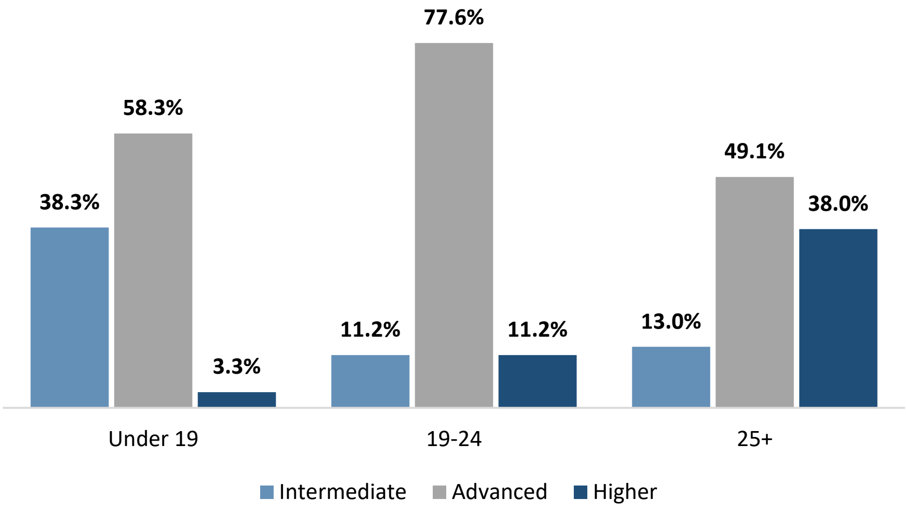
Breakdown of Apprenticeship Starts by Level, 2015/16 – 2020/21



Source: FE Apprenticeship Statistics

As shown in the chart below, the older the starter, the more likely they are to embark on a higher level apprenticeship, with 38% of this age cohort starting a higher level in 2020/21 compared with 11.2% of all 19-24 year old starts and just 3.3% for those age below the age of 19. Conversely, under 19s starting an apprenticeship are more likely to be starting an intermediate course than their older counterparts.

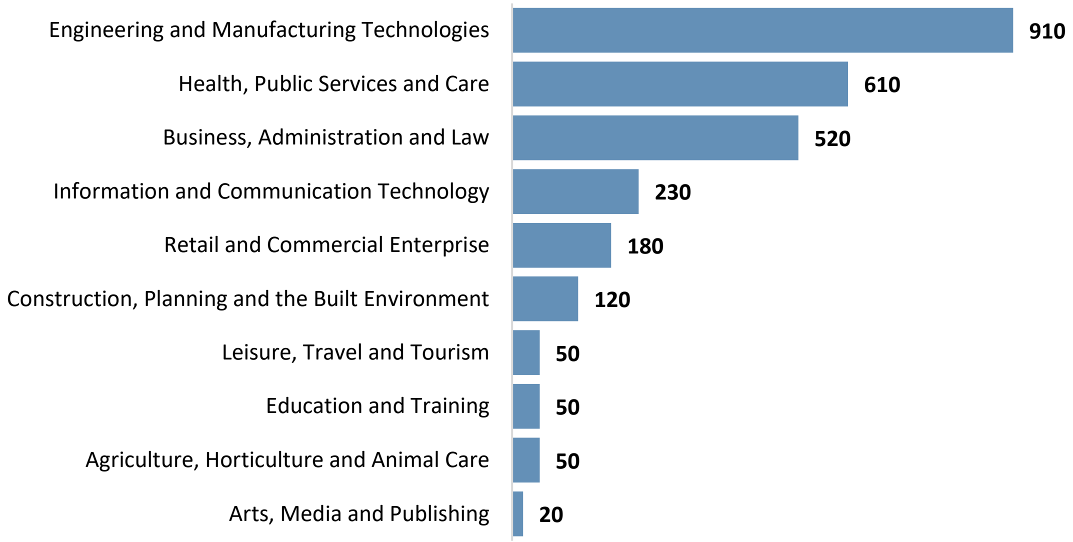
Breakdown of Apprenticeship Starts by Level and Age, 2020/21



Source: FE Apprenticeship Statistics

Around a third of apprenticeship starts in 2020/21 were in engineering and manufacturing. Significant numbers were also in health, public services and care as well as in business, administration and law.

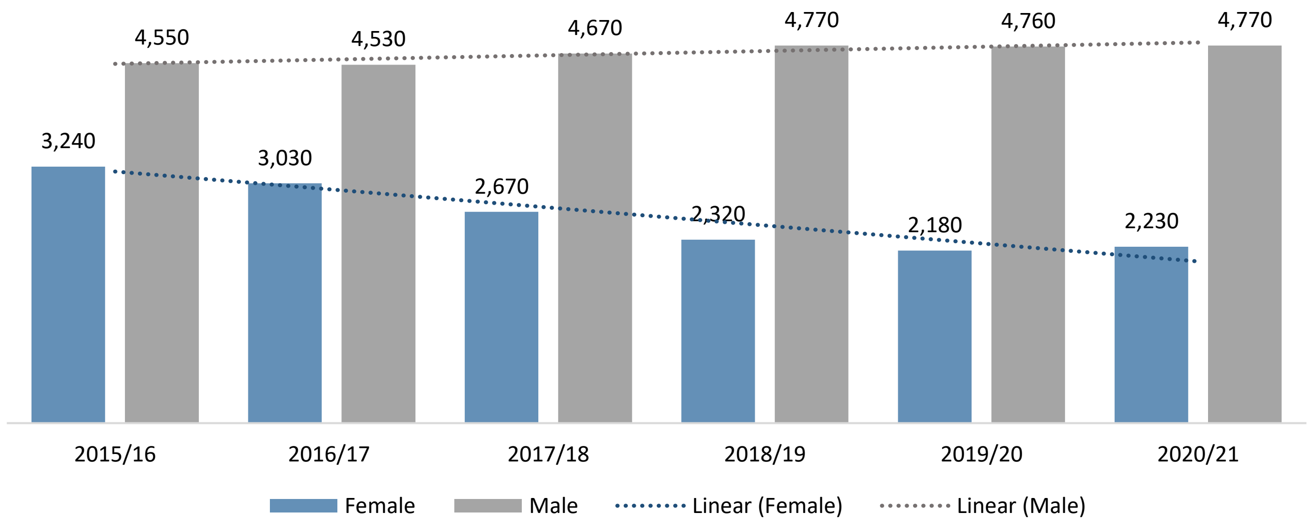
Breakdown of Apprenticeship Starts by Sector, 2020/21



Source: FE Apprenticeship Statistics

Data is also available on participation on apprenticeship schemes. Overall participation stood at 7,010 in 2020/21, of which 2,230 were female and 4,770 were male. Overall, participation has fallen by 10% since 2015/16 (compared with a decline of 37.7% in apprenticeship starts over the same period). However, as the chart below shows, whilst participation amongst males has remained broadly stable, there has been a notable decline in participation levels amongst females (-31.2%). This means that females now account for just 31.8% of all those participating compared with 41.6% in 2015/16.

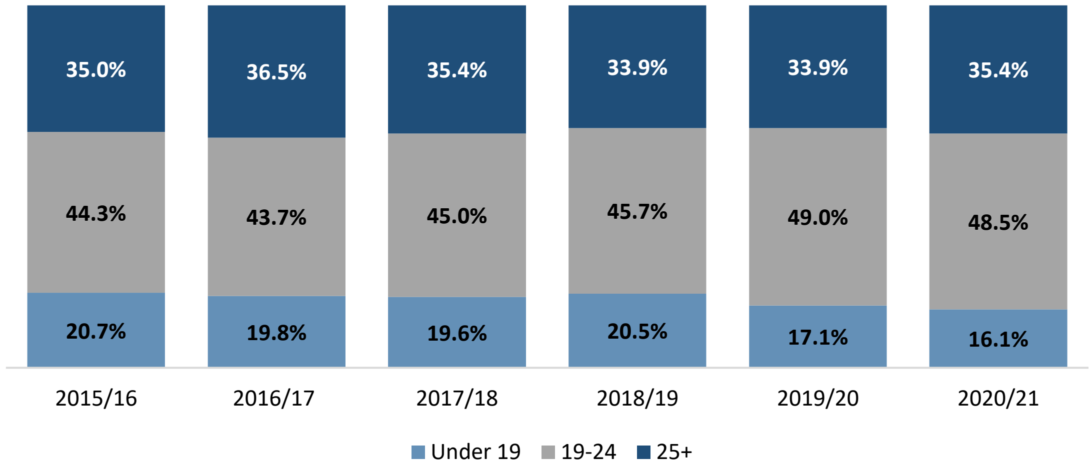
Participation in Apprenticeships, 2015/16 – 2020/21



Source: FE Apprenticeship Statistics

The proportion of those participating in an apprenticeship who are below the age of 19 has fallen from over a fifth of the total in 2015/16 to 16.1% in 2020/21. Not surprisingly, this age band makes up a smaller proportion of all participants than all starts. Those aged 19 to 24 make up the largest proportion of participants (48.5% of participants compared with 39.2% of starts). The remining 35.4% of participants are aged 25 and above. This compares with 39.2% of starts.

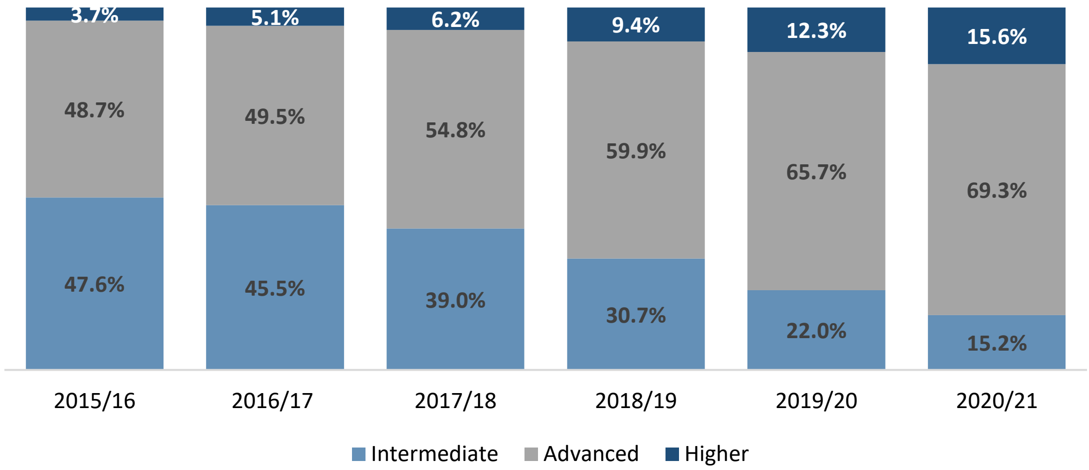
Breakdown of Apprenticeship Participation by Age, 2015/16 – 2020/21



Source: FE Apprenticeship Statistics

Just 15.2% of all those participating in an apprenticeship in 2020/21 were enrolled on an intermediate course compared with 47.6% in 2015/16. This reflects the sharp decline in the number of intermediary apprenticeship starts. The proportion participating in higher apprenticeships likewise reflects the sharp rise in starts for this classification, and they now account for 15.6% of participants compared with just 3.7% in 2015/16. The majority of apprentices are on advanced courses, at 69.3% of the total in 2020/21.

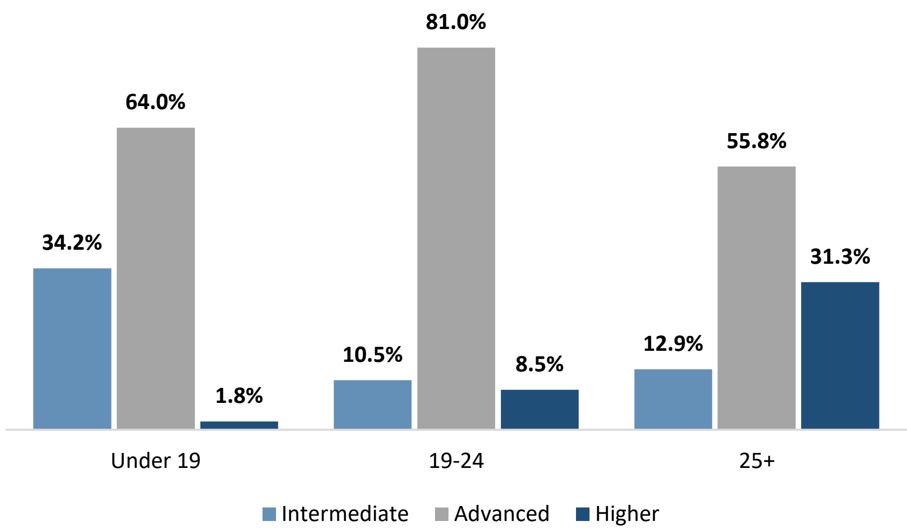
Breakdown of Apprenticeship Participation by Level, 2015/16 – 2020/21



Source: FE Apprenticeship Statistics

Almost one in three people undertaking an apprenticeship who are aged 25 and above are enrolled on a higher level course. This compares with just 8.5% of those aged 19-24 and less than 2% of the under 19 cohort. A third of under 19s are participating in an intermediate apprenticeship.

Breakdown of Apprenticeship Starts by Level and Age, 2020/21



Source: FE Apprenticeship Statistics

In 2020/21, there were 1,360 apprenticeship achievements, of which 320 were for intermediate courses, 900 for advanced courses and 140 for the successful completion of higher level apprenticeships.

Training

Shropshire employers were slightly less likely to offer training to their employees than their national counterparts in 2019, although 29% did offer a combination of both off and on the job training.

Types of Training Offered, 2019

Source: Employer Skills Survey, 2019

The main reason given for not training were that all staff are fully proficient (77% of all non-trainers). Shropshire employers were twice as likely to say that no training is available in relevant subjects than their national counterparts (12% compared with 6%).

Earnings

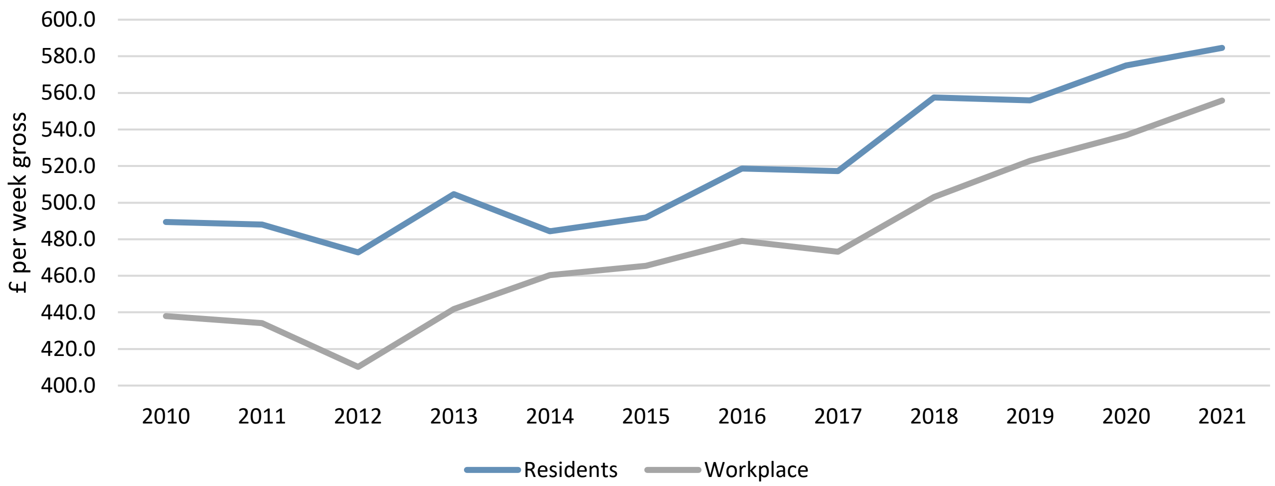
Shropshire supports a relatively low wage economy, with workplace earnings lower than national and regional averages. This arises from Shropshire's traditional reliance on jobs in comparatively unproductive and low paid sectors, including agriculture, tourism and food and drink.

The chart below shows median gross weekly earnings for people who work in Shropshire but who do not necessarily live there (workplace earnings) alongside earnings for people who live in Shropshire but who do not necessarily work there (residents' earnings), The latter have been consistently higher than the former over the last decade and are pushed up by the relatively high level of out-commuting amongst the highest earners. However, the gap has closed in recent years which may be indicative of:

- lower levels of out-commuting amongst top earners
- lower levels of in-commuting for low paid employment
- the presence of better paid employment within the county

or a combination of all three factors.

Comparison between Workplace and Residents Earnings, 2010-2021



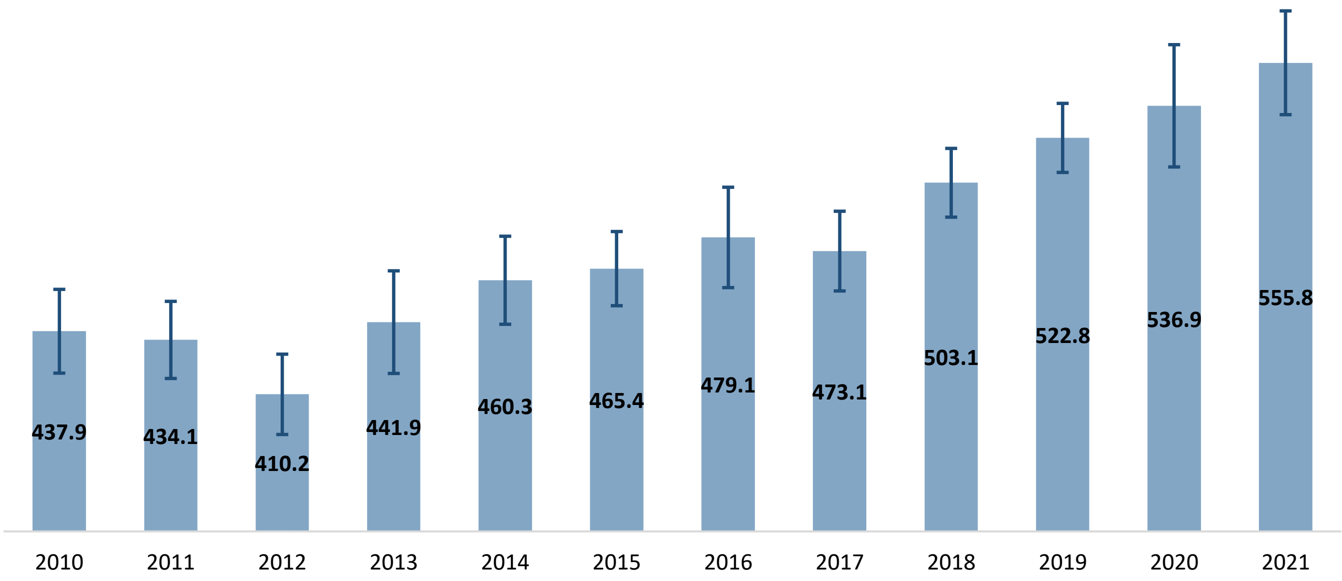
Source: ONS Annual Survey of Hours and Earnings, 2021, © Crown Copyright 2022

Workplace Earnings

Gross weekly median earnings for people working in Shropshire in 2021 stood at £555.80 per week. This represents an increase of £18.90 compared with 2020 which is a rise of 3.5%. Since 2010, wages have risen by £117.90 per week (+26.9%), which represents an average annual rise of 2.4%. Weekly earnings in the West Midlands in 2021 stood at £585.00, which is £29.20, or 5.3% higher than in Shropshire. Nationally, the £612.80 average weekly earnings is £57.00 higher than earnings commanded in Shropshire (+10.3% higher).

In annual salary terms, the median for Shropshire in 2021 was £27,837.

Workplace Earnings in Shropshire, 2010-2021

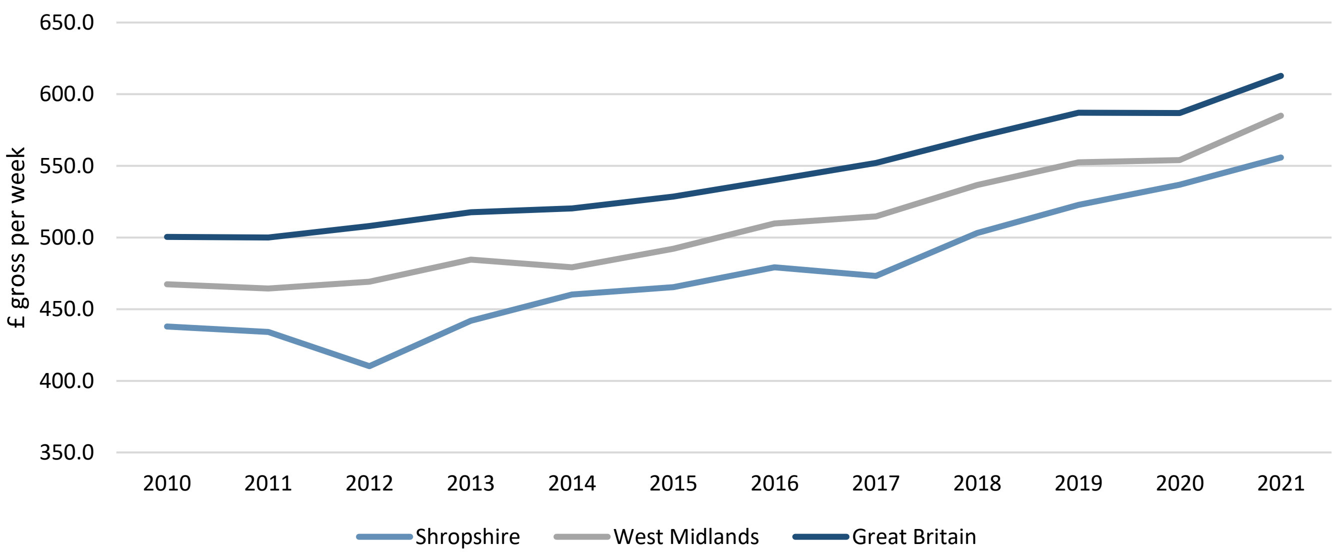


Source: ONS Annual Survey of Hours and Earnings, Workplace 2021, © Crown Copyright 2022

Note: Taking a confidence interval of 4.1% in 2021 into account, weekly gross workplace earnings in Shropshire were between £533.01 and £578.59.

Workplace wages in Shropshire have risen marginally quicker than they have either regionally or nationally since 2010 and as such the differential between local, regional, and national wages has narrowed slightly. In the West Midlands, wages rose by 25.2% between 2010 and 2021, while in Great Britain they rose by 22.5%. This compares with 26.9% growth in Shropshire.

Growth in Workplace Earnings, 2010 – 2021

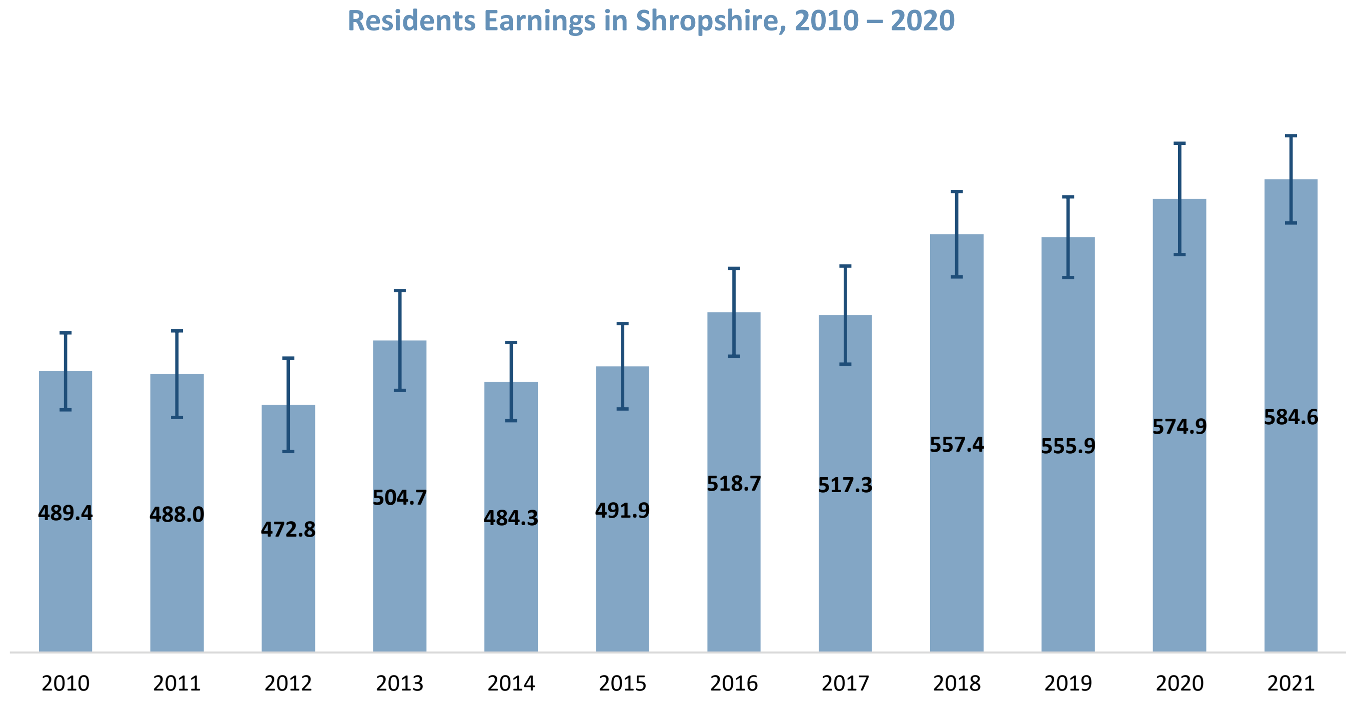


Source: ONS Annual Survey of Hours and Earnings, Workplace 2021, © Crown Copyright 2022

Residents Earnings

Gross weekly median earnings for workers living in Shropshire in 2021 was £584.60. This represents an increase of £9.70 compared with 2020 which is a rise of 1.7%. Since 2010, wages have risen by £95.20 (+19.5%) which represents an average annual rise of 1.8%. Weekly earnings in the West Midlands in 2021 stood at £581.80, which is £2.80 or -0.5% less than in Shropshire. Nationally, the £613.10 average weekly wage is £28.50 higher than earnings commanded in Shropshire (+4.9% higher)

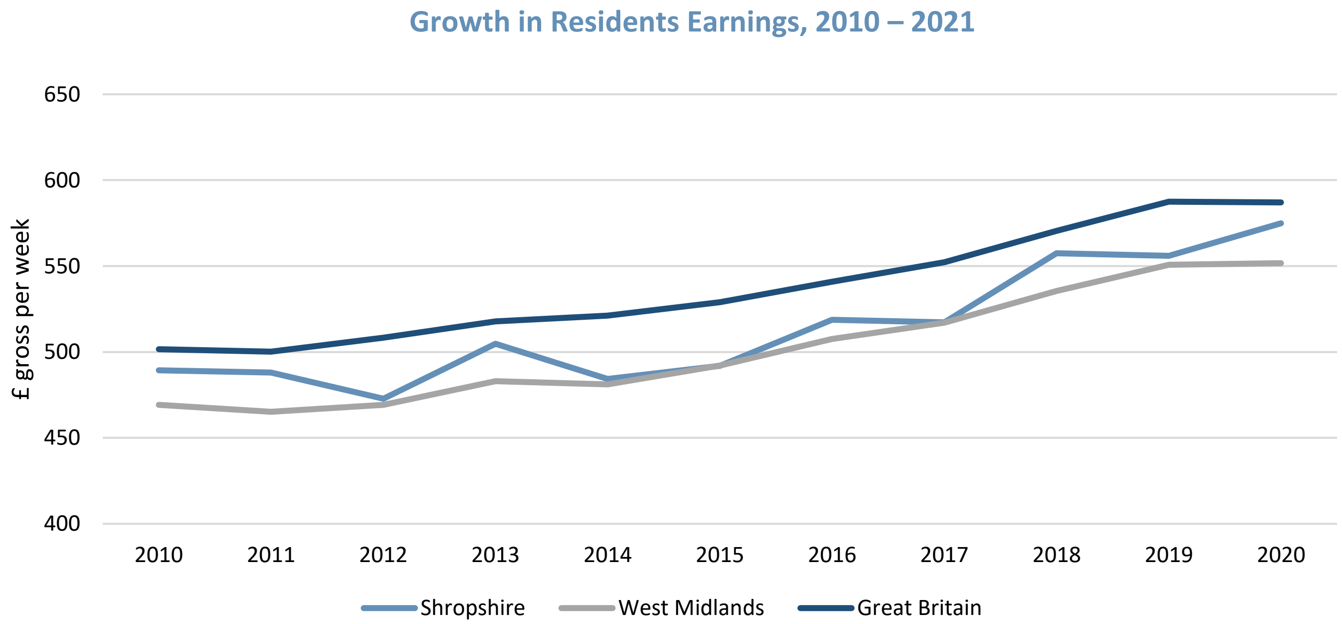
In annual salary terms, the median for Shropshire in 2021 was £29,558.



Source: ONS Annual Survey of Hours and Earnings, Residents 2021, © Crown Copyright 2022

Note: Taking a confidence interval of 3.7% in 2021 into account, weekly gross residents' earnings in Shropshire were between £562.23 and £606.23.

Residents' wages in Shropshire have risen marginally slower than they have either regionally or nationally since 2010 and as such the differential between local and regional and national wages has widened very slightly. In the West Midlands, wages rose by 24.0% between 2010 and 2021, while in Great Britain they rose by 22.2%. This compares with 19.5% growth in Shropshire.



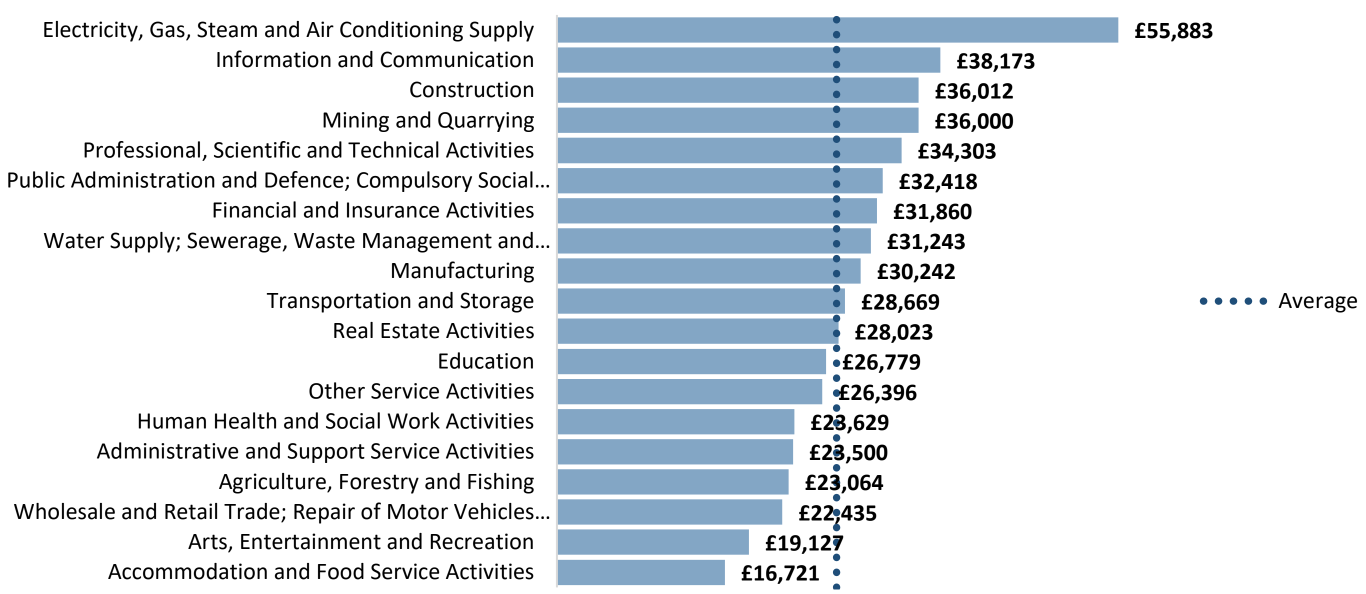
Source: ONS Annual Survey of Hours and Earnings, Residents 2021, © Crown Copyright 2022

Average Wages by Industrial Sector

Shropshire is predominantly a low wage economy, with most jobs in sectors which command lower than average earnings.

The following chart shows average annual wage levels according to broad industrial classifications for Shropshire and how these compare with the average workplace annual wage for Shropshire of £27,837 (2021 figure). It shows the best paid employment is within electricity, gas, steam and air conditioning supply and information and communication, while the lowest paid employment is in arts, entertainment and recreation and accommodation and food services.

Average Wages by Sector, 2021

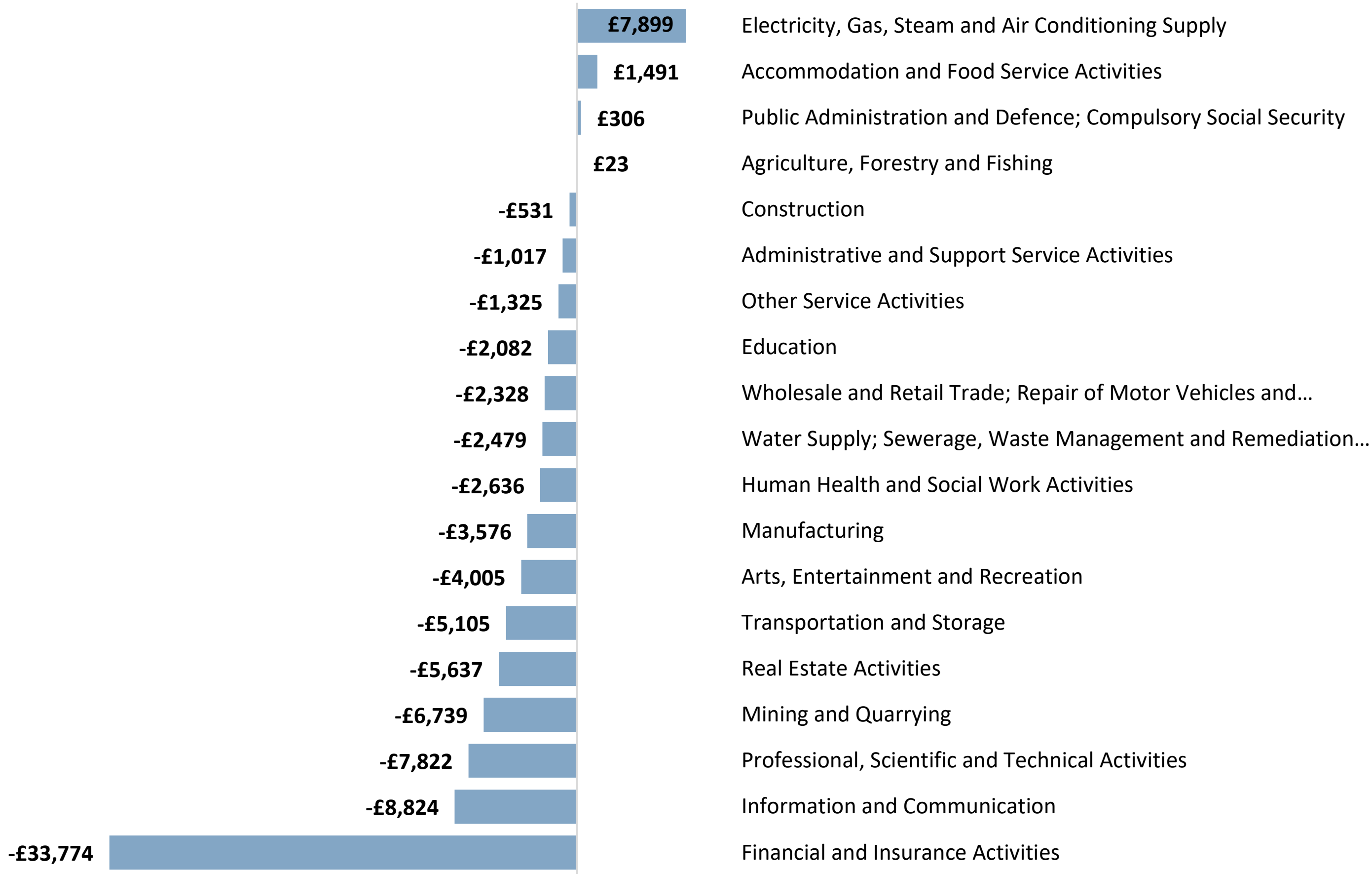


Source: EMSI Burning Glass/ASHE

Despite the wage disparity between jobs in Shropshire and the national average, there are a few sectors in Shropshire where annual wages are higher than they are nationally. As the following chart shows, this is particularly the case for electricity, gas, steam and air conditioning supply, where Shropshire wages are £7,899 (16.5%) higher than they are nationally. Workers in accommodation and food services are also paid notably more in Shropshire than their national counterparts (+9.8% or £1,491). Wages in agriculture and public administration were also higher in Shropshire than in England in 2021, albeit only marginally so.

At the other end of the scale, average salaries in Shropshire fall well below the national average in the financial and insurance sector (£33,774 or 51.4%) less). They are also significantly lower than average in information and communication, professional, scientific & technical, mining & quarrying, real estate activities, transport & storage, arts, entertainment and recreation, manufacturing, human health and social work, water supply, wholesale & retail and education.

Difference between Shropshire and England Salary Levels by Sector, 2021



Source: EMSI Burning Glass

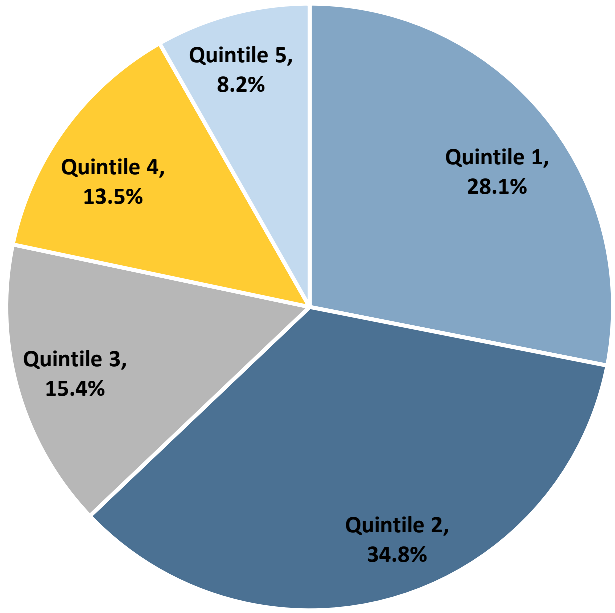
Average salaries by sector range from £16,721 (accommodation & food services) to £55,883 (electricity, gas, steam & air conditioning supply). Dividing the sectors into quintiles based on salary levels, shows the following breakdown:

Salary Quintile	Sector
1	Accommodation and Food Service Activities
1	Arts, Entertainment and Recreation
1	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles
1	Other Service Activities
2	Agriculture, Forestry and Fishing
2	Administrative and Support Service Activities
2	Human Health and Social Work Activities
2	Education
3	Real Estate Activities
3	Transportation and Storage
3	Manufacturing
3	Water Supply; Sewerage; Waste Management and Remediation Activities
4	**Financial and Insurance Activities**
4	Public Administration and Defence; Compulsory Social Security
4	Professional, Scientific and Technical Activities
4	Mining and Quarrying
5	Construction
5	Information and Communication
5	Electricity, Gas, Steam and Air Conditioning Supply

Note: Quintile 1 = lowest paid, Quintile 5 = highest paid

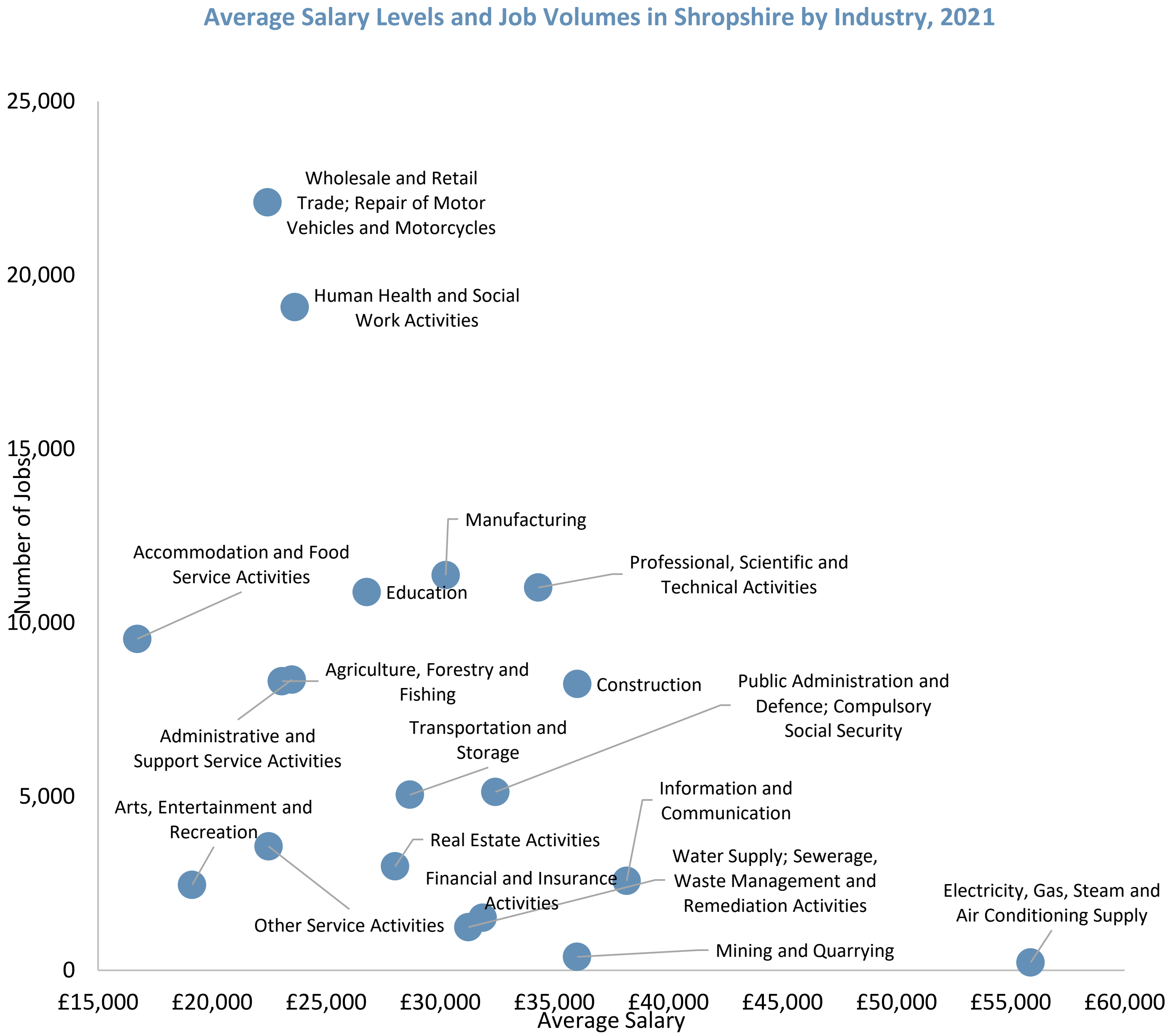
Based on employment levels in the above sectors, it is evident that the majority of Shropshire workers are employed in the bottom two quintiles according to salary levels. 28.1% of all employment is in quintile 1, with an additional 34.8% in quintile 2. In contrast, just 8.2% of employment is within the top quintile in terms of salary level.

Breakdown of Employment Levels by Salary Quintile, 2021



Source: EMSI/Shropshire Council Calculations

The following chart also illustrates that most Shropshire employment is in lower paid sectors, with comparatively few people working in the highest paid industries.



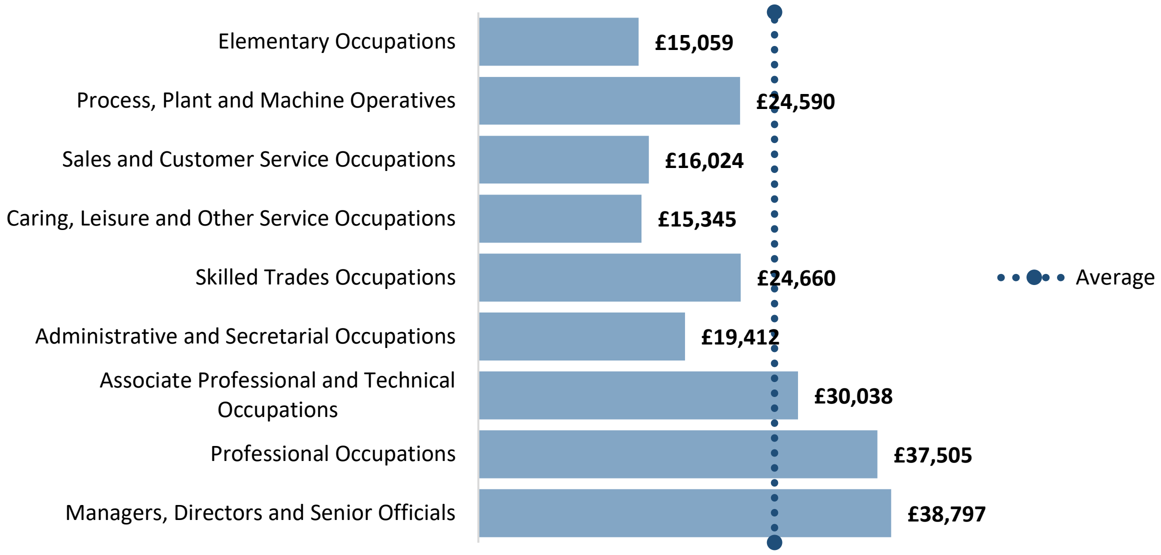
Source: EMSI Burning Glass

Average Wages by Occupation

The following chart shows average annual wage levels according to broad occupational classifications for Shropshire and how these compare with the average workplace annual wage for Shropshire of £27,837 (in 2021). It is evident that only those working in SOC 1-3 occupations (managers, directors and senior officials; professional occupations; associate professional & technical occupation) command salaries above the average for Shropshire.

The lowest paid employment is in elementary occupations, with jobs in sales and customer service and caring, leisure and other service occupations also relatively low paid.

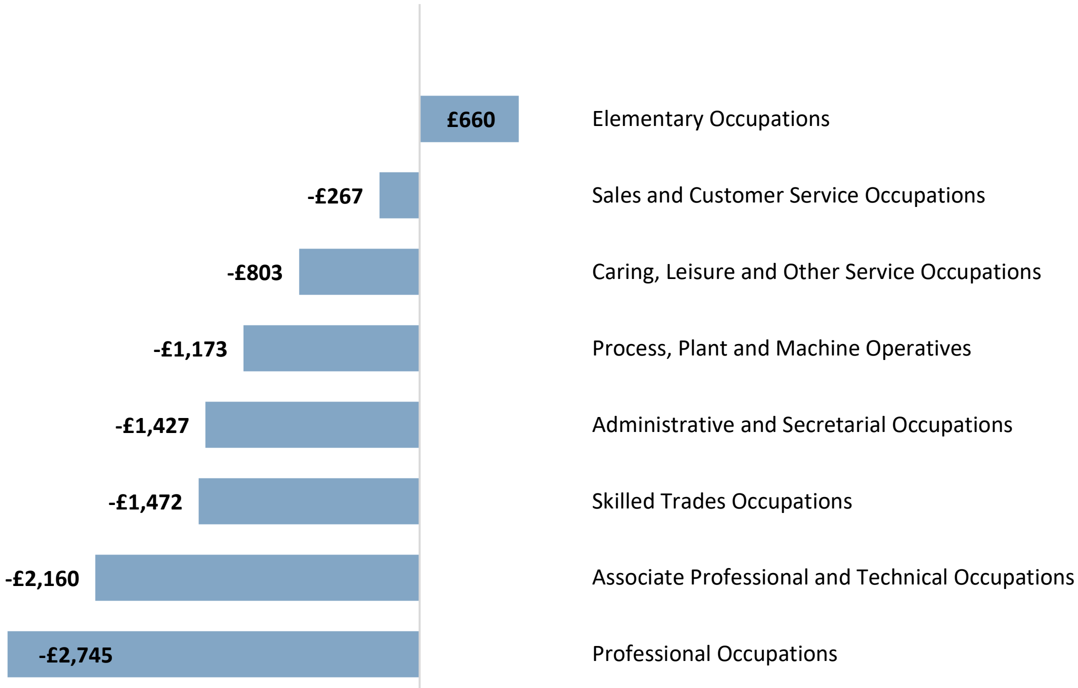
Average Wages by Occupation, 2021



Source: EMSI Burning Glass/ASHE

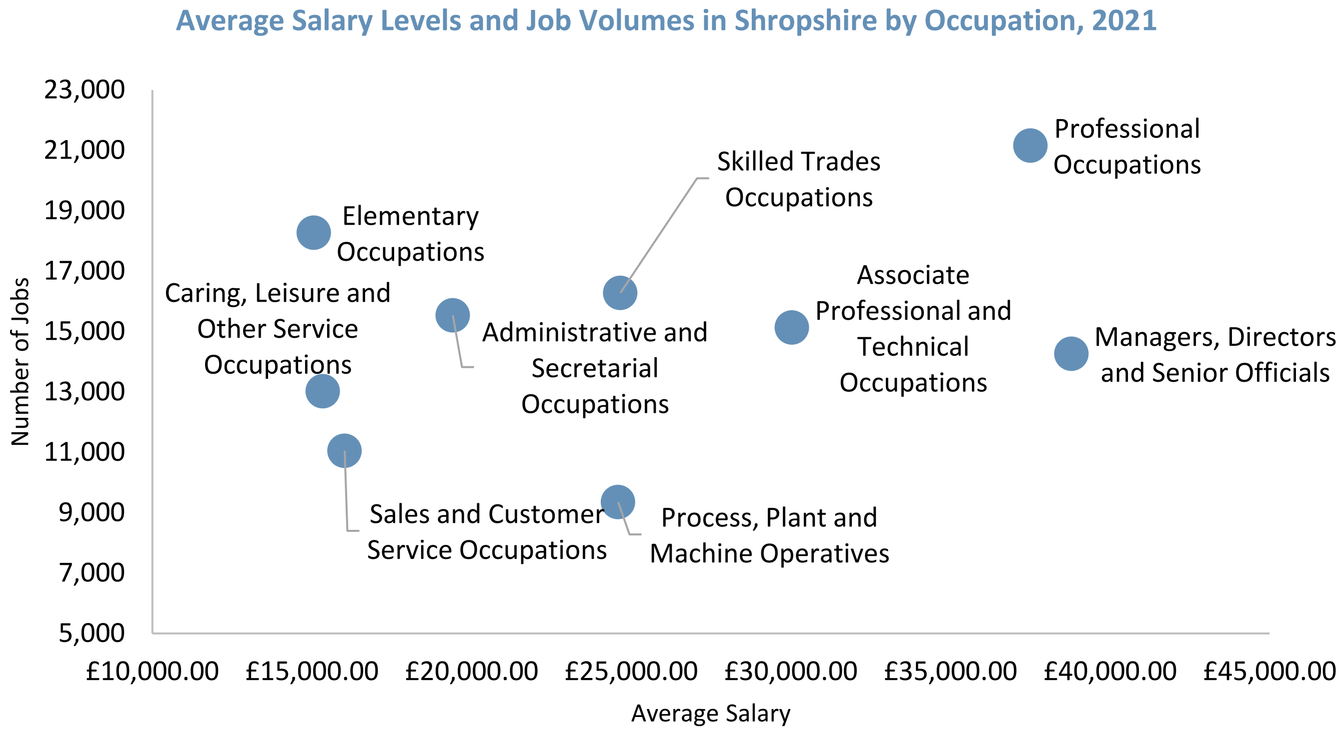
Across all occupational classifications except elementary occupations, salary levels in Shropshire were lower than the national average in 2021. This is most pronounced amongst the best paid occupations (SOC 1-3) and least pronounced amongst the lowest paid occupations. This reflects the lower difference between median earnings for the worst paid 10% of workers in Shropshire and the national average compared to the top quintile of earners, who earn notably less than their national counterparts.

Difference between Shropshire and England Salary Levels by Sector, 2021



Source: EMSI Burning Glass

The following chart shows the volume of Shropshire jobs according to their occupational classification against the average salary that they command. It shows that the two occupations that are greatest in volume in Shropshire – elementary occupations and professional occupations – are at opposite ends of the pay scale.



Source: EMSI Burning Glass

The median advertised salary for jobs located in Shropshire for the year ending April 2022 was £25,000.

Theme: Strategic Locations

Evidence relating to:

- **Housing & Households**
- **Housing Affordability**
- **Housing Completions**
- **Visitor Economy**
- **Town Centre Vibrancy**

Housing & Households

There were 129,674 households in Shropshire at the time of the 2011 Census, with a household population of 298,183. The remaining 7,946 people (2.6% of the total) lived in communal establishments.

A concealed family is one living in a multi-family household, for example a young couple living with parents and can be an indicator of unmet housing needs. There were 1,135 such households in Shropshire in 2011 (1.3% of all households).

Occupancy ratings provide a measure of whether a household's accommodation is overcrowded or underoccupied. An occupancy rating of -1 or less implies that a household has fewer bedrooms than required. Across Shropshire, there were 2,923 households living in overcrowded conditions (based on the number of bedrooms), which equates with 2.3% of the total.

4,128 households in 2011 were without central heating (3.2% of the total).

Shropshire Households and Household Characteristics, 2011

Number of Households	129,674
Concealed Households	1,135
Dwellings	135,544
Household Spaces	135,645
Vacant Household Spaces	730
Average Number of Rooms	6.0
Average Number of Bedrooms	2.9
Shared Dwellings	28
Occupancy (-1 or less bedrooms)	2,932
Without Central Heating	4,128

Source: ONS Census 2011, © Crown Copyright 2022

The following table shows the household population and the number of households by Shropshire place plan area.

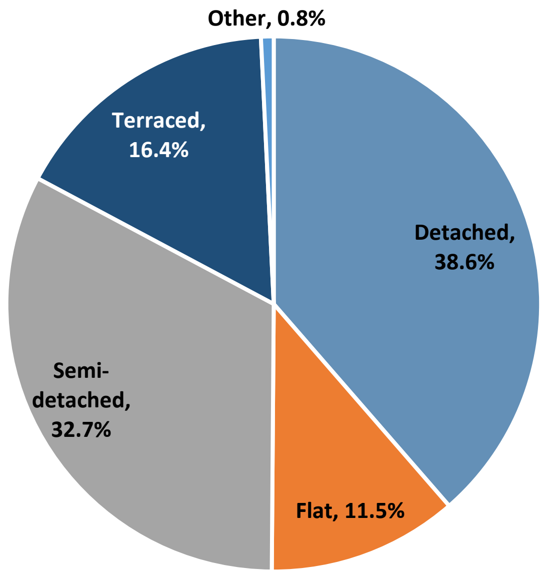
Household and Dwellings by Place Plan Area, 2011

	Household Population	Communal Establishment Population	Households	Household Spaces	Dwellings	Average Household Size
Albrighton	7,060	704	2,990	3,135	3,134	2.36
Bishops Castle	10,506	235	4,627	5,045	5,043	2.27
Bridgnorth	23,296	395	10,258	10,778	10,771	2.27
Broseley	5,583	26	2,419	2,529	2,529	2.31
Church Stretton	7,664	493	3,411	3,676	3,676	2.25
Cleobury Mortimer	7,658	151	3,182	3,391	3,391	2.41
Craven Arms	6,502	42	2,819	3,017	3,017	2.31
Ellesmere	7,961	289	3,403	3,558	3,557	2.34
Highley	4,123	-	1,808	1,910	1,910	2.28
Ludlow	16,079	191	7,423	7,912	7,898	2.17
Market Drayton	21,146	981	8,869	9,232	9,222	2.38
Much Wenlock	4,824	68	2,139	2,260	2,260	2.26
Oswestry	39,448	1,161	17,047	17,797	17,796	2.31
Minsterley & Pontesbury	4,894	110	2,052	2,126	2,126	2.38
Shifnal	7,700	42	3,420	3,549	3,549	2.25
Shrewsbury	93,818	2,356	41,110	42,474	42,442	2.28
Wem	15,320	475	6,450	6,761	6,761	2.38
Whitchurch	14,601	227	6,247	6,495	6,490	2.34
Total	298,183	7,946	129,674	135,645	135,572	2.30

Source: ONS Census 2011, © Crown Copyright 2022

A high proportion of housing in Shropshire is detached or semi-detached, representing 38.6% and 32.7% of the total respectively in 2011. There are comparatively few flats (11.5%).

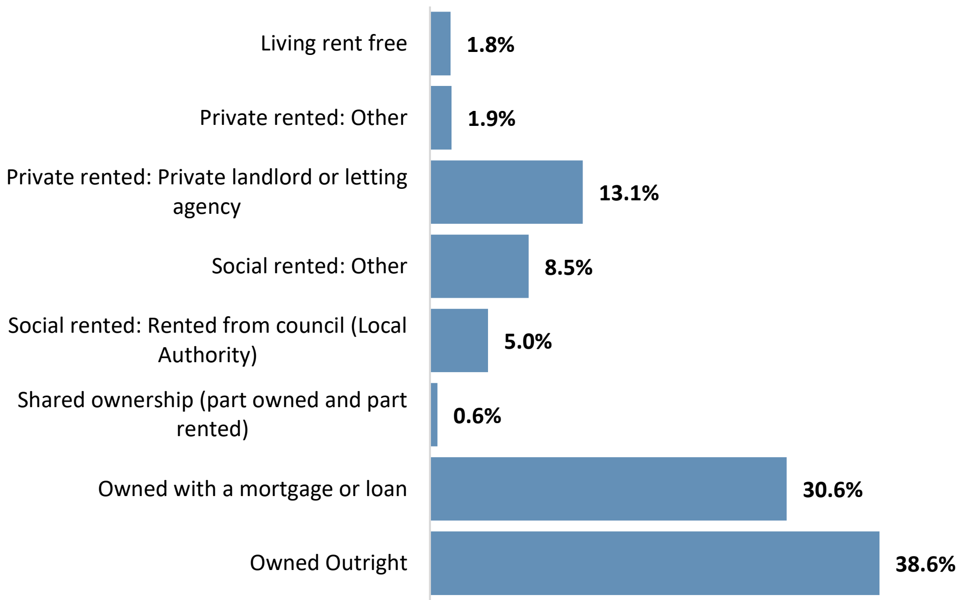
Breakdown of Shropshire Housing by Type



Source: ONS Census 2011, © Crown Copyright 2022

A high proportion of housing in Shropshire is owner occupied – 38.6% is owned outright and 30.6% with a mortgage or loan. 13.1% is rented privately and 13.5% is social rented.

Breakdown of Shropshire Housing by Tenure

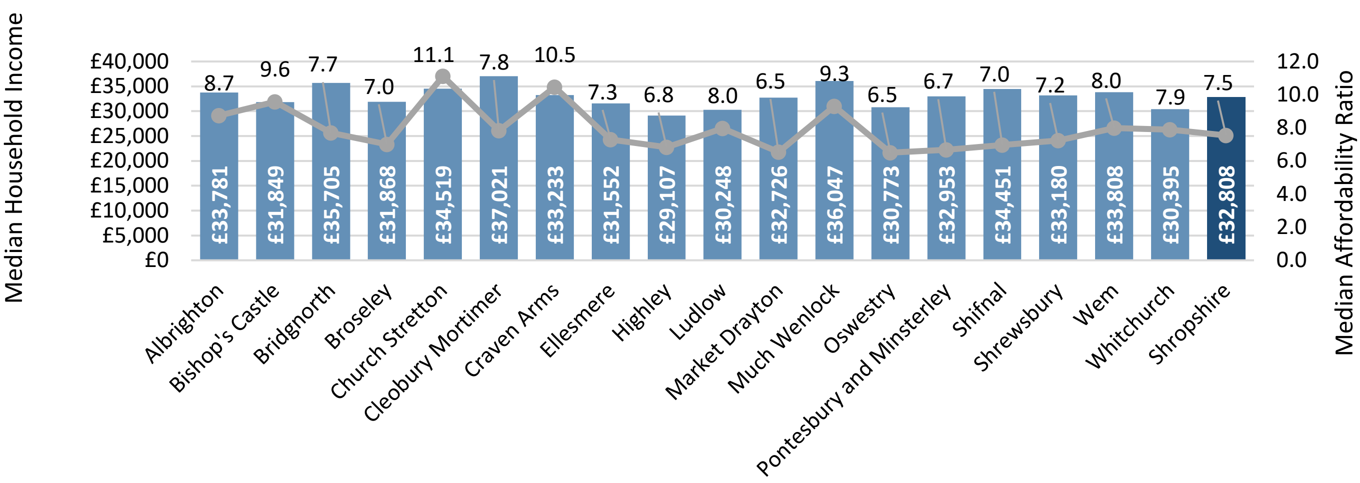


Source: ONS Census 2011, © Crown Copyright 2022

Housing Affordability

Housing affordability is generally measured using “affordability ratios” which examine household income levels against average housing costs. The higher the ratio, the less affordable housing is. In Shropshire in 2021, the median gross household income stood at £32,808, which generated an affordability ratio of 7.5, meaning that the average (median) cost of a house is 7.5 times higher than average (median) income. At a place plan level, median household incomes range from £29,107 (Highley) to £37,021 (Cleobury Mortimer). Meanwhile, median affordability ratios ranged from less than 7 in Highley, Market Drayton, Oswestry and Pontesbury and Minsterley to over 10 in Church Stretton and Craven Arms.

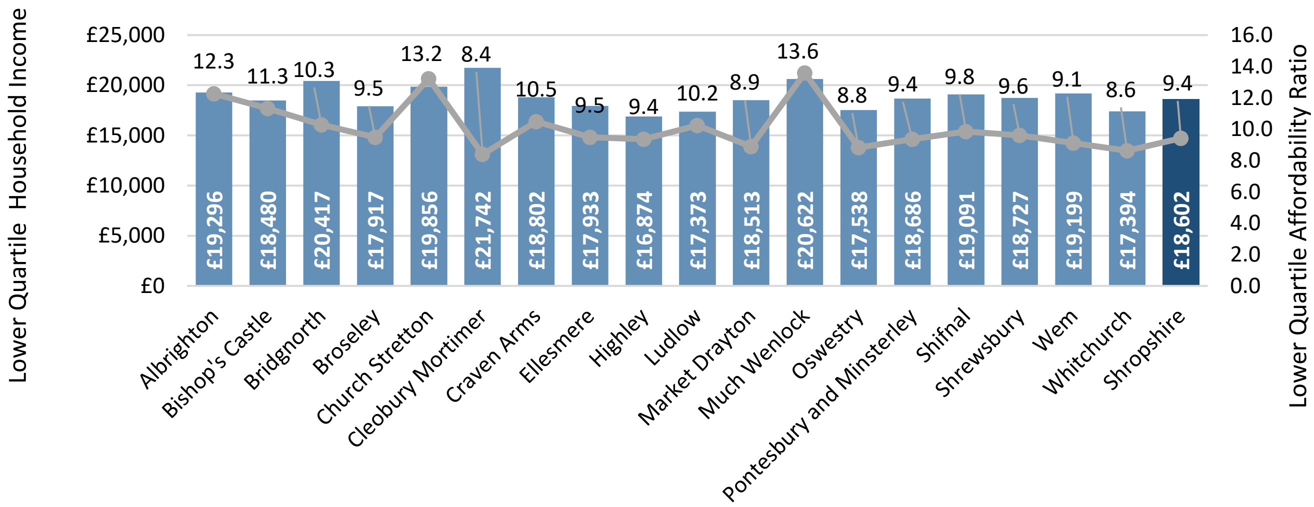
Median Level Affordability by Shropshire Place Plan Area



Source: CACI Paycheck Gross Household Income Data, 2021.
Housing costs were calculated using HM Land Registry Price Paid Data.

Using lower quartile household income in relation to lower quartile house prices gives a better indication of how affordable housing is for those on lower income levels. Lower quartile median gross household income stood at £18,602 in 2021, with a lower quartile housing affordability ratio of 9.4. Across the place plan areas, these ratios are particularly high in Church Stretton and Much Wenlock.

Lower Quartile Level Affordability by Shropshire Place Plan Area



Source: CACI Paycheck Gross Household Income Data, 2021.
Housing costs were calculated using HM Land Registry Price Paid Data.
The following table shows the household income required to afford to buy or rent a range of different homes. It shows that rented accommodation is more affordable than buying, especially social housing. However, there are still more than 40,000 households across Shropshire whose income is insufficient to cover social rental costs and almost half of all households cannot afford median private rental costs. Less than 20% of households can afford to purchase a property of median value, and only a third can afford the lower quartile price.

Income Needed for Accommodation by Tenure

Shropshire	Gross Household Income Required to Afford	Total Households	Households		% of Total Households	
			Can Afford	Cannot Afford	Can Afford	Cannot Afford
Median Price to Buy	£63,579	144,654	23,554	121,100	16.3%	83.7%
LQ Price to Buy	£45,087	144,654	47,929	96,725	33.1%	66.9%
Mean House Price to Buy	£74,321	144,654	17,044	127,610	11.8%	88.2%
Starter Home to Buy	£59,457	144,654	28,032	116,622	19.4%	80.6%
Median Private Rent	£30,000	144,654	78,511	66,143	54.3%	45.7%
Lower Quartile Rent	£25,200	144,654	91,017	53,637	62.9%	37.1%
Mean Private Rent	£31,440	144,654	67,500	77,154	46.7%	53.3%
Social Rent	£18,947	144,654	104,282	40,372	72.1%	27.9%
Affordable Rent	£22,445	144,654	91,017	53,637	62.9%	37.1%

Source: HM Land Registry Price Index

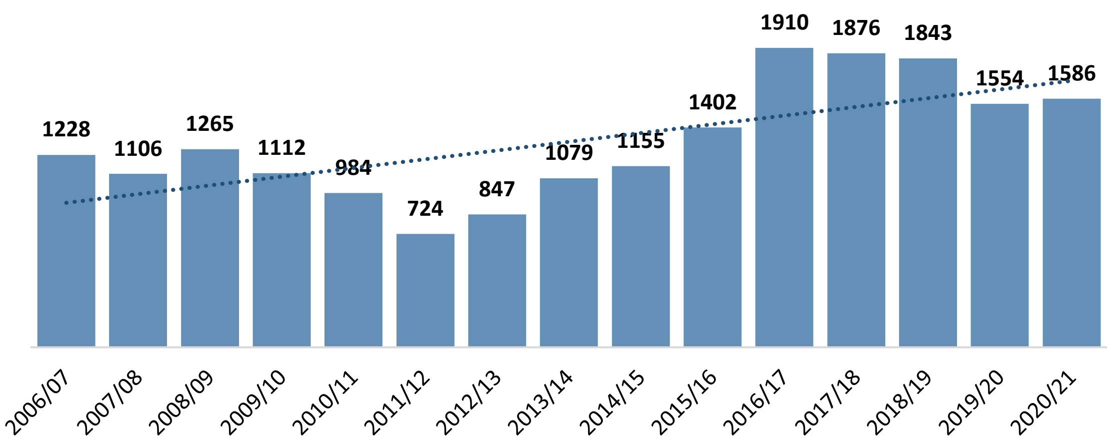
Housing Completions

Shropshire experienced unprecedented levels of housebuilding in the years 2016-17, 2017-18 and 2018-19 and this has led to unprecedented levels of estimated net migration during the same period in Shropshire. Based on historic trends this level of housing growth is unlikely to be sustained annually into the future.

The chart below shows that housebuilding has decreased during 2019-20 and 2020-21 compared to the previous three years. The Covid 19 pandemic and lockdown measures is likely to have impacted on these recent housebuilding trends.

The Pre-Submission Draft of the Shropshire Local Plan 2016 to 2038 sets out a housing requirement of around 30,800 dwellings during 2016 to 2038 (about 1,400 annually). If this planned requirement is accepted by the Planning Inspector, it would indicate that since 2015-16, housebuilding levels in Shropshire have remained above proposed levels.

Annual Housing Completions



Source: Planning Monitoring Data

For more information on housing in Shropshire, please follow the links below.

[Strategic Housing Market Assessment Part 1]

[Strategic Housing Market Assessment Part 2]

Visitor Economy

12.70 tourism trips were made to Shropshire in 2019[5.]. This represents a decrease of 0.41 million trips compared with 2018, which is the equivalent of a 3.1% decline. Total visitor spend on these trips was £430 million. Spend fell by £40.9 million between 2018 and 2019 (-8.7%). Undoubtedly, the tourism sector will have been severely impacted by the Covid-19 pandemic in 2020 and 2021.

Shropshire Visitor Economy: Key Metrics, 2019

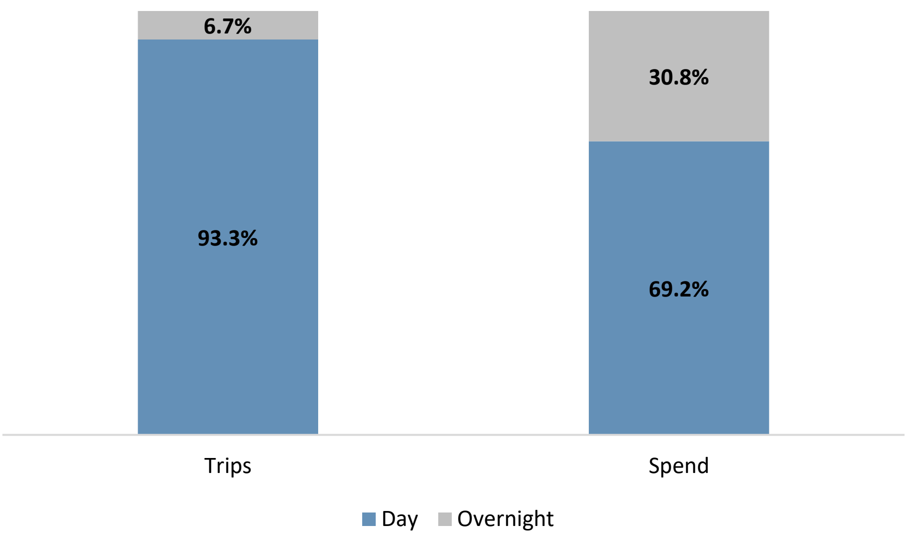
	Day	Overnight	Total
Trips	11.84	0.85	12.70
Spend (£ mn)	£297.0	£132.0	£430.0

Source: Visit Britain

More than nine out of 10 trips made to Shropshire are day trips. However, trips involving at least one overnight stay account for a much higher share of spend, at 30.8%. Average spend on a staying visit is more than six times higher than on a day trip. Even for a visit involving just one night away, spend is more than twice as high.

Across both day and overnight visits, the average spend is £35.92 (2018). This has fallen by £3.30 since 2016 (+8.4%), primarily due to a notably rise in the volume of day trips to Shropshire.

Breakdown of Tourism Visits and Spend by Type of Trip, 2019



Source: Visit Britain

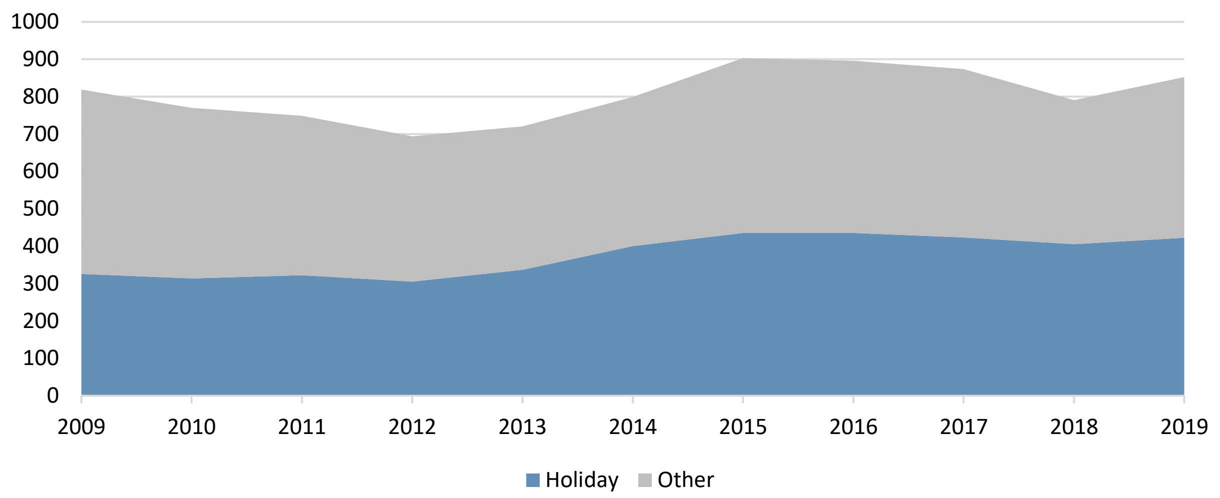
Overnight Visits

The total number of overnight trips to Shropshire in 2019 stood at 852,000. This represents an increase of 62,000 visits compared with the previous year (+7.8%). The number of overnight visits has however declined compared with the peak (2015). Holiday trips (i.e. those taken for leisure that involve staying in commercial accommodation) account for around half of all trips (423,000 trips in 2019).

The number of trips for holiday purposes has risen by 29.7% since 2009, while the volume of other overnight trips taken has declined by 12.9%.

[5] [1]*Based on rolling three-year average (2018 figure reflects average of 2016, 2017 and 2018)*

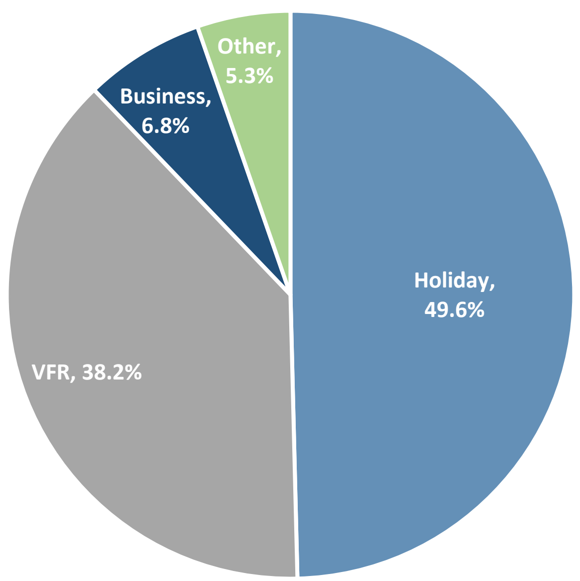
Growth in Overnight Trips to Shropshire, 2009-2019



Source: Visit Britain

A substantial number of trips made to Shropshire are to visit friends and relatives (VFR), with these accounting for almost four out of every 10 trips. 6.8% of trips are for business purposes.

Breakdown of Tourism Overnight Trips by Purpose, 2019



Source: Visit Britain

The total number of nights associated with tourism visits was more than 2.5 million in 2018, with the average length of stay 3 nights. Those visiting on holiday or friends and relatives stay longer than business travellers (3.1 nights on average compared with 1.9).

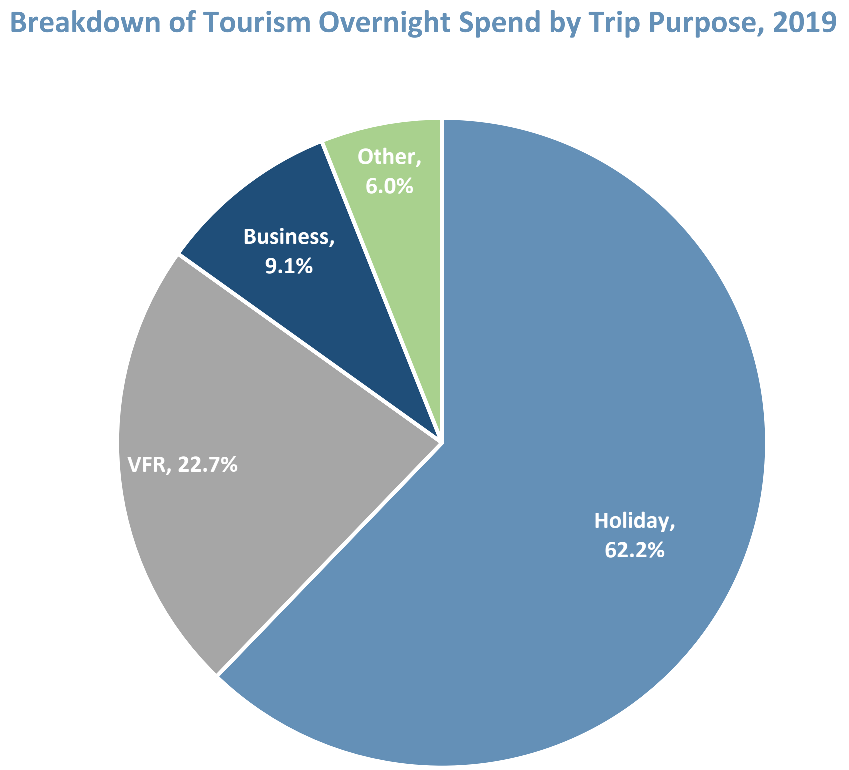
Consumer spend on overnight visits to Shropshire rose by 35% in the 10 years to 2019 to reach £132 million. This is the equivalent of £155.32 per trip (£52.18 per night). Spend on holidays spent in commercial accommodation have risen more quickly than spend on trips overall (+61% to £82 million).

Spend per trip is also higher for holidays than for trips overall at £194.79, which is the equivalent of £62.64 per person per night.

Spend per trip for business purposes is highest (£205.71) while spend on VFR trips is notably lower (£92.12).

Source: Visit Britain

62.2% of all overnight spend in Shropshire was attributable to holiday visits in 2019. VFR contributed 22.7% while business travel accounted for 9.1%.



Source: Visit Britain

The following table shows total spend, spend per person per overnight trip, and spend per night depending on what type of trip is being taken.

Spend on Overnight Trips by Trip Purpose, 2019

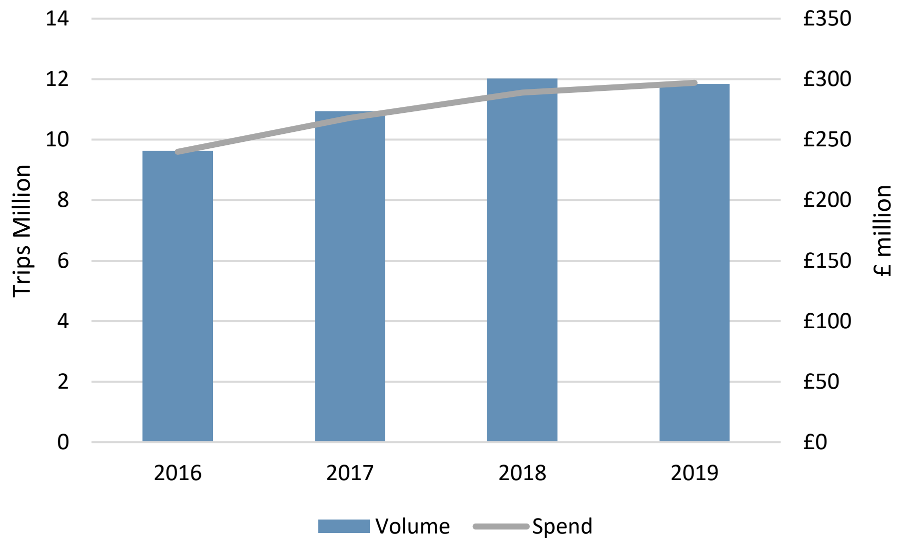
	Total Spend	Spend per Trip	Spend per Night
Holidays	£182 million	£194.79	£62.64
VFR	£30 million	£92.12	£30.10
Business	£12 million	£205.71	£108.76
Other	£8 million	£176.47	£69.77
All Trips	£132 million	£155.32	£52.18

Source: Visit Britain

Day Visits

The number of tourism day visits to Shropshire in 2019 stood at 11.84 million, which is a slight decline of 180,000 over the previous year (-1.5%). Tourism day visits are defined as any irregular visit not involving an overnight stay which lasts at least three hours. Since 2016, the volume of visits has risen by 22.9%. Over the 2016-2019 period, spend on day trips has increased by a similar proportion (+23.8%) to reach £297 million. Average spend per trip is £25.08 per person.

Growth in Days Visits and Associated Spend, 2016-2019



Source: Visit Britain

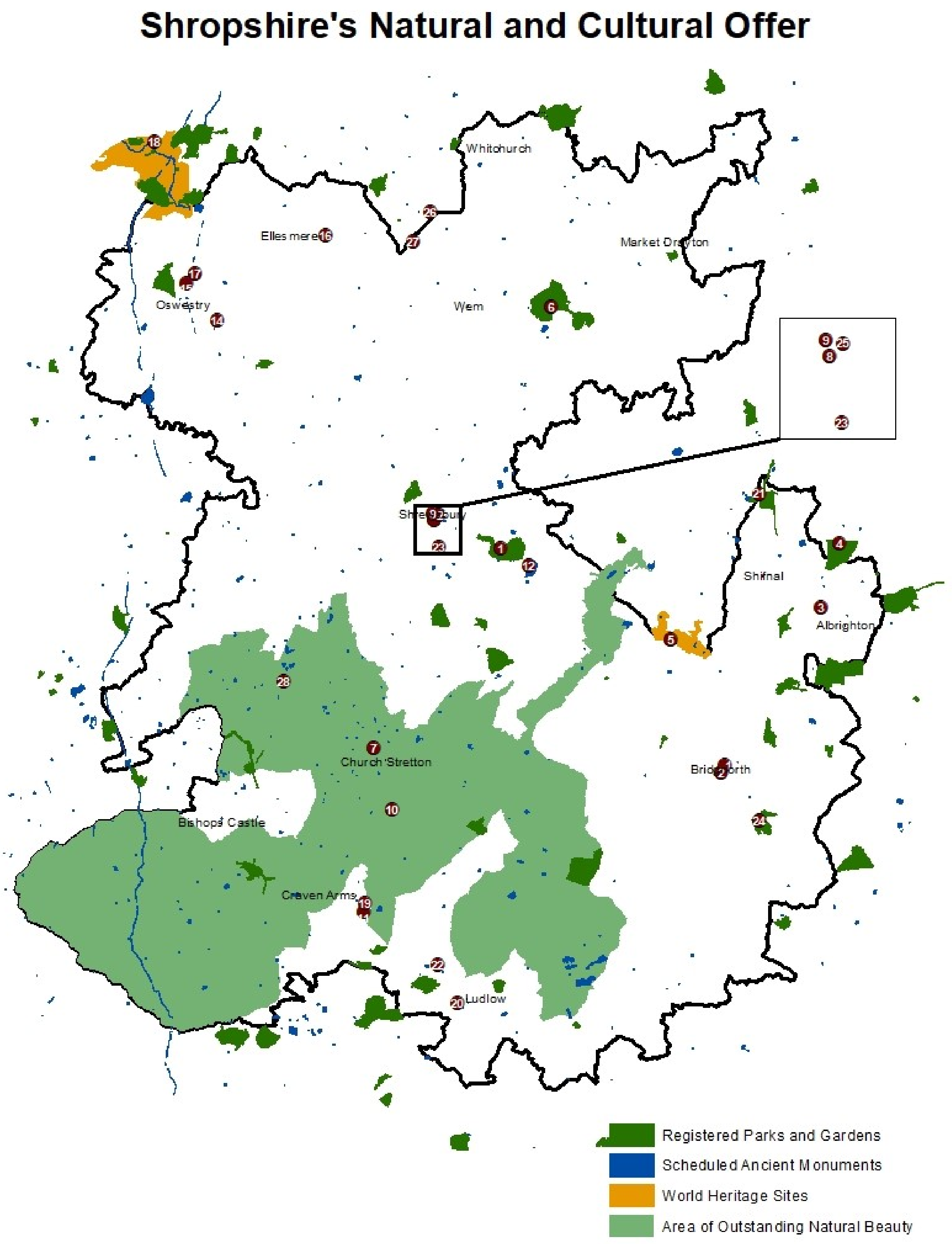
Shropshire's Natural and Cultural Heritage Offer

Shropshire is rightfully recognised as an exceptionally historic and beautiful county. 23% of the county is designated as an Area of Outstanding Natural Beauty (the Shropshire Hills) and Shropshire is the only county in England to contain part of two World Heritage Sites (Ironbridge and the Pontcysyllte Aqueduct).

It has the third highest number of listed buildings (6,906) and Registered Parks and Gardens (30), and the fourth highest number of Conservation Areas (127) in the country. The county has 80km of canals that link the Midlands with mid and north-east Wales, 14 internationally important wetland sites, 7 Special Areas of Conservation (of European significance), 107 Sites of Special Scientific Interest, and more varied geology than anywhere else in Britain.

These fantastic outdoor assets are not just important for heritage and wildlife; they bring in over £100 million annually to the local economy, employ at least 2,200 people, and make a significant contribution to improving mental and physical health and wellbeing.

The following map shows the location of some of these assets, as well as Shropshire's key visitor attractions and museums.



For key, please see next page

1 = Attingham Park

2 = Severn Valley Railway

3 = RAF Museum Cosford

4 = Weston Park

5 = Ironbridge Gorge Museums Trust

6 = Hawkstone Park Follies

7 = Carding Mill Valley and the Long Mynd

8 = Shrewsbury Museum & Art Gallery

9 = Theatre Severn

10 = Acton Scott Historic Working Farm

11 = Stokesay Castle

12 = Wroxeter Roman City

13 = Bridgnorth Cliff Railway

14 = British Ironworks Centre

15 = Oswestry Hill Fort

16 = The Mere

17 = Park Hall Farm

18 = Pontcysyllte Aqueduct

19 = Shropshire Hills Discovery Centre

20 = Ludlow Castle

21 = Lilleshall Sports Centre

22 = Ludlow Race Course

23 = Shrewsbury Town Football Club

24 = Dudmaston Hall

25 = Shrewsbury Castle

26 = Fenn’s, Whixall and Bettisfield Mosses National Nature Reserve

27 = Wem Moss National Nature Reserve

28 = Stiperstones National Nature Reserve

Town Centre Vibrancy

Shropshire Council undertakes an annual survey of town centre businesses to assess:

- The range and diversity of the retail offer
- The number and types of non-retail businesses operating
- The number and location of vacant properties
- Distinctive characteristics within the town, for example a strong tourism offer or a high penetration of "low end" traders
- The amount, location and type of domestic residences in the centre of the town
- Change over time and the identification of emerging trends

The research also helps to monitor how towns have adapted to the Covid-19 pandemic and the extent to which they are recovering.

The following towns are part of the survey:

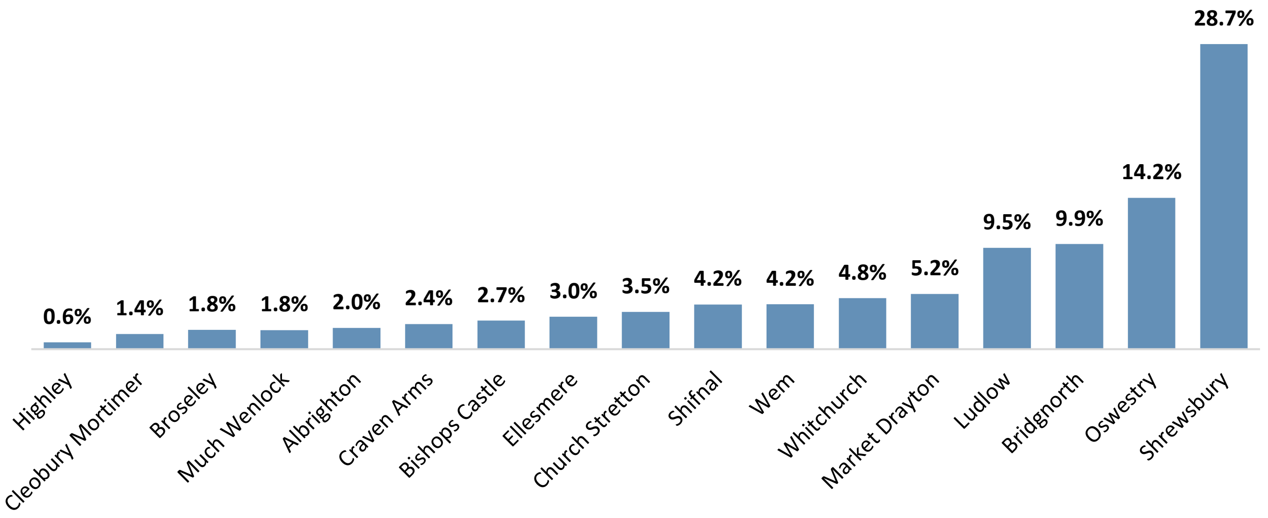
- Albrighton
- Bishop's Castle
- Bridgnorth
- Broseley
- Church Stretton
- Cleobury Mortimer
- Craven Arms
- Ellesmere
- Highley
- Ludlow
- Market Drayton
- Much Wenlock
- Oswestry
- Shifnal
- Shrewsbury
- Wem
- Whitchurch

The research was first undertaken in 2019. The audit work was repeated in September 2020 following the first national lockdown to monitor change over the previous year. Non-essential retail and hospitality businesses were able to trade at this time (albeit with strict social distancing measures in place). The third survey took place in September/October 2021. At this time, no pandemic restrictions were in place.

Key Results

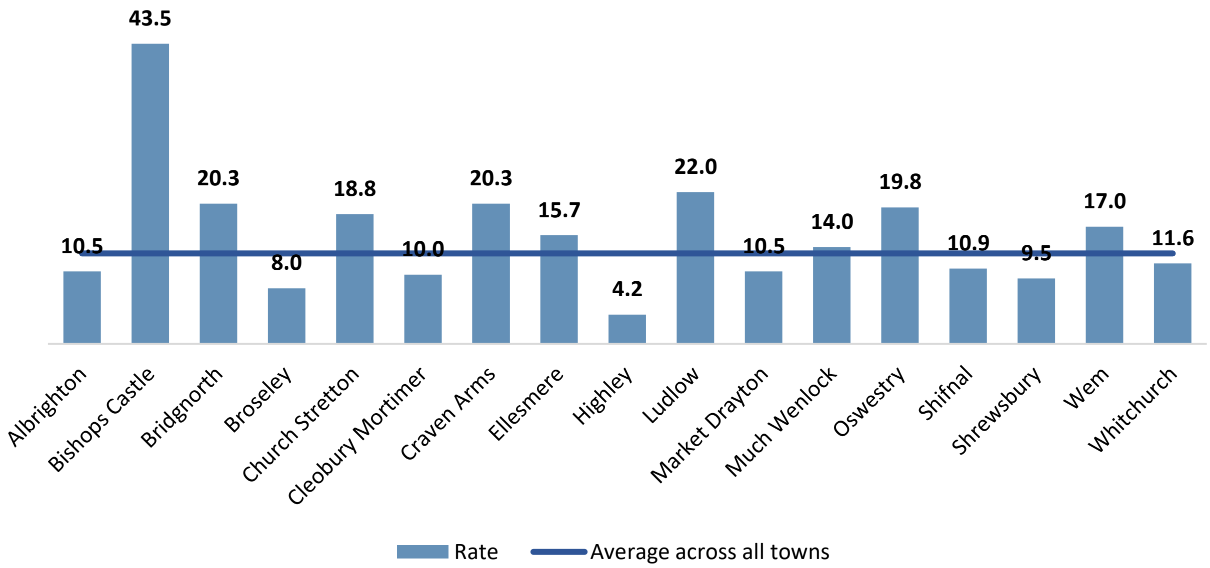
There are 2,542 commercial premises in the Shropshire's town centres listed above, of which around 11% had changed hands or had been subject to a change in use since the survey was undertaken in 2020. This represents significantly less churn than was in evidence in 2020, when 15% of all businesses had changed since 2019.

There has been a reduction in the number of premises classed as commercial (60 fewer businesses) – this is primarily due to the closure of the Pride Hill Centre, which has reduced commercial capacity in Shrewsbury. Across the county, some formerly commercial premises are now residential. Despite the contraction in commercial space in Shrewsbury, almost 29% of all outlets are in the county town. Oswestry is the second largest centre, with 14% of businesses. Accounting for almost one in ten outlets are Ludlow and Bridgnorth.



Source: Shropshire Council Retail Audit

Bishop's Castle has the highest number of commercial outlets per head of population – more than twice as many as any other (reflecting its relative remoteness and significant hinterland). Highley has the fewest commercial outlets per head of population. Shrewsbury has lower than average number of commercial outlets per head of population despite being the largest shopping destination.



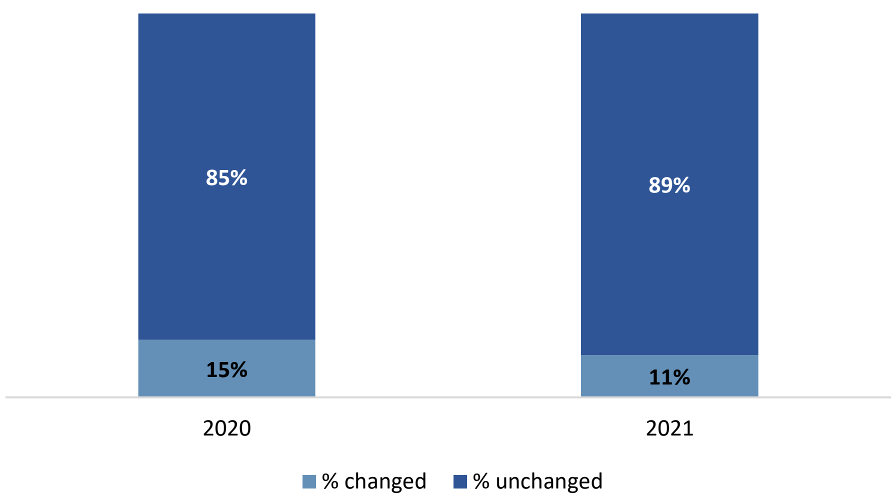
Source: Shropshire Council Retail Audit

385 commercial units across Shropshire changed hands or use (or were rebranded) between 2019 and 2020, which was the equivalent of a churn rate of 15%. This rate reduced to 11% between 2020 and 2021, when 275 businesses had changed hands or use. 29% fewer stores changed in 2021 compared to 2020 (110 fewer).

Levels of churn decreased in all towns in 2021 except in Highley (where there was no change at all in businesses operating in 2020) and in Church Stretton and Craven Arms (where churn was the same in 2020 and 2021). 2021 churn was highest in Highley and Market Drayton and lowest in Cleobury Mortimer, Broseley and Much Wenlock. Market Drayton has seen high churn rates in both 2020 and 2021. However, other towns where significant change was recorded in 2020 have much lower levels of churn in 2021. These include Wem, Shifnal and Cleobury Mortimer.

Churn was high in Bridgnorth in 2020, but was more in line with the county average in 2021. Likewise, churn in Shrewsbury was reduced, although the rate is still higher than the average across all Shropshire towns. Larger towns (especially Shrewsbury) have been more impacted by the closure of national chains.

Percentage of Premises Changing Hands or Use, 2020 & 2021



Source: Shropshire Council Retail Audit

Churn by Town, 2021

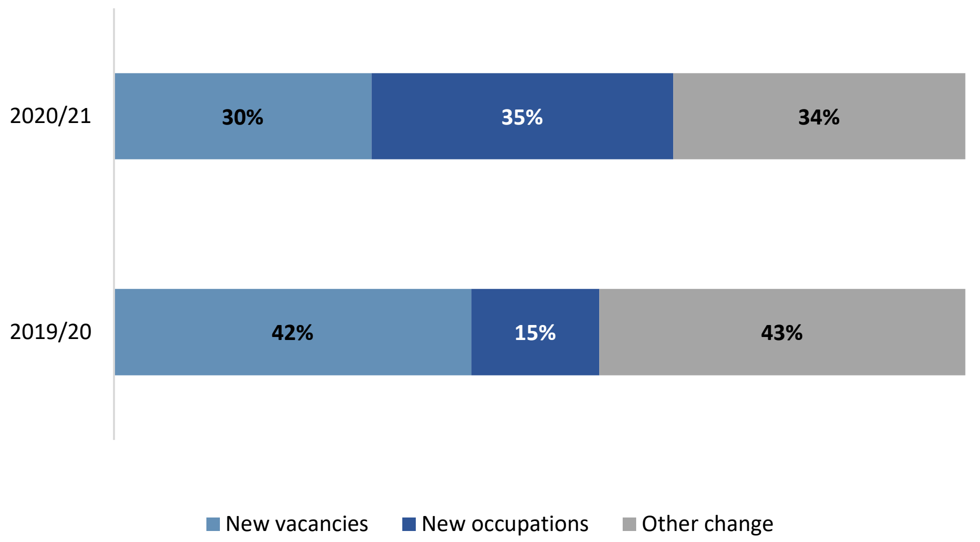
Less than 5% Churn	***6-9% Churn***	***10-13% Churn***	***14% and above Churn***
Cleobury Mortimer (3%)	*Albrighton (6%)*	*Craven Arms (10%)*	*Market Drayton (15%)*
Much Wenlock (4%)	*Shifnal (6%)*	*Ellesmere (10%)*	*Highley (25%)*
Broseley (4%)	*Bishop's Castle (7%)*	*Ludlow (10%)*	
	Church Stretton (7%)	*Oswestry (10%)*	
	Wem (7%)	*Bridgnorth (11%)*	
		Whitchurch (11%)	
		Shrewsbury (13%)	

Source: Shropshire Council Retail Audit

In 2020, 42% of all change across Shropshire was premises becoming vacant, with just 15% of previously vacant premises becoming filled. In 2021, however, 35% of all change was previously vacant premises becoming filled. This suggests a level of renewed confidence on the high streets, although the number of vacancies being filled only exceeded the number of new vacancies occurring by a relatively small margin (82 new vacant premises in 2021 versus 98 that have been filled).

In summary, therefore, positive change (businesses opening in either previously vacant or occupied premises) accounted for 69% of the total in 2021 (albeit some of the change may be rebranding only) compared with 58% in 2020.

Breakdown of Town Centre Change, 2021

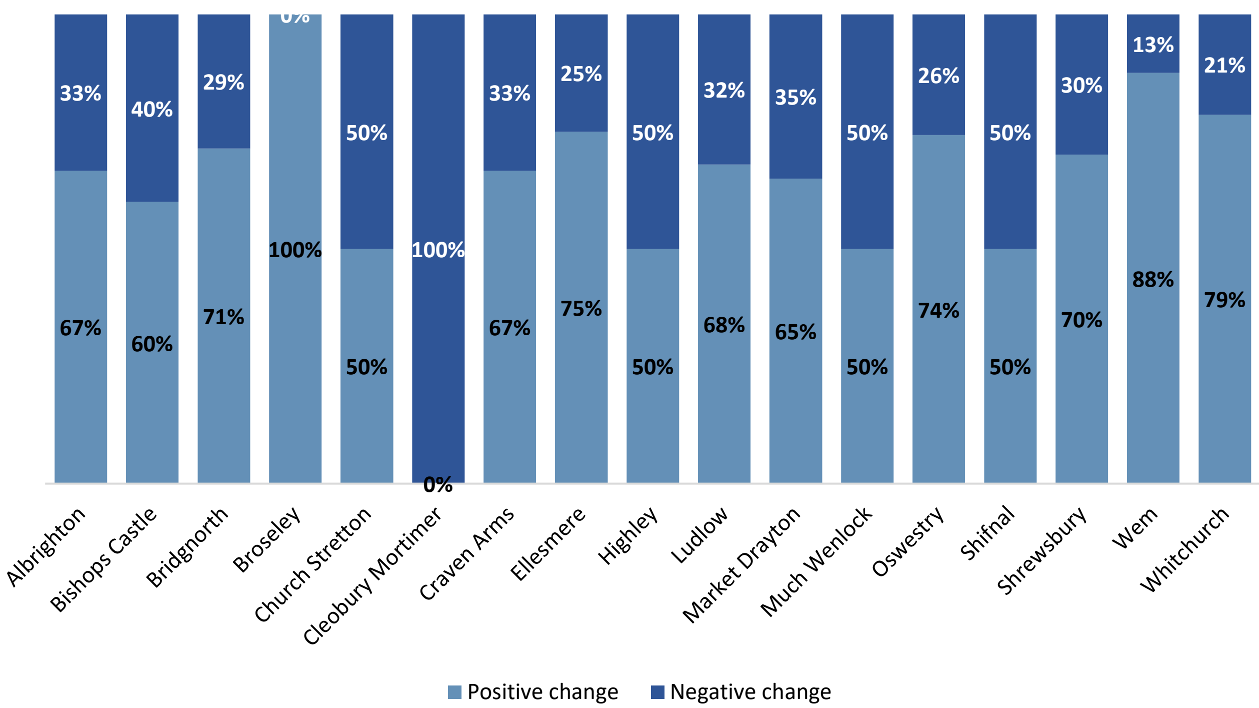


Source: Shropshire Council Retail Audit

Business churn in most towns in 2021 was more positive than negative. The main exception to this is Cleobury Mortimer, where the only changes were stores closing, and Church Stretton and Much Wenlock where change was half negative and half positive (in both these towns though there was comparatively little change).

Above average levels of positive change were recorded in Bridgnorth, Broseley, Ellesmere, Oswestry, Shrewsbury, Wem and Whitchurch.

Positive vs Negative Change by Town, 2021

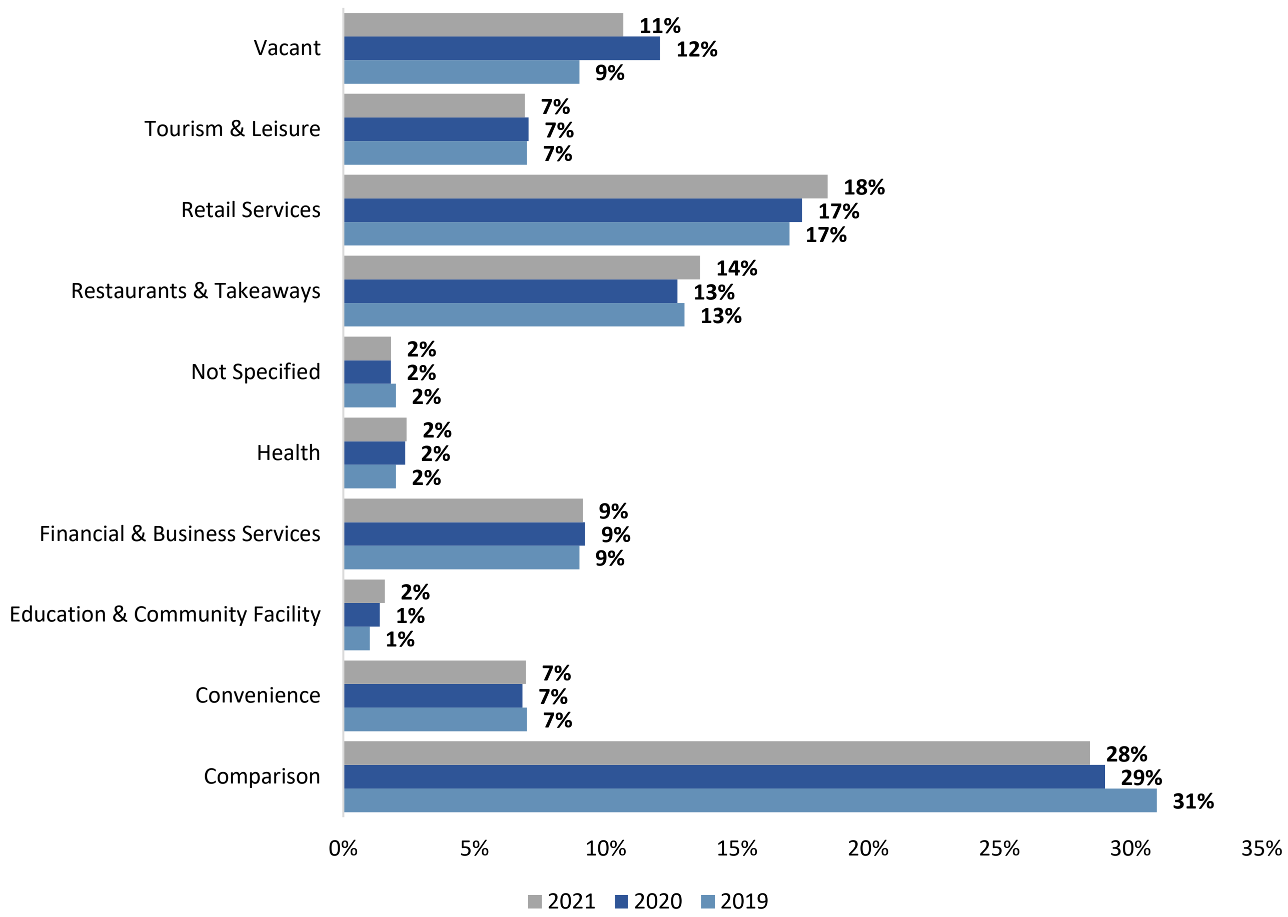


Source: Shropshire Council Retail Audit

The comparison retail sector has been particularly impacted by lower levels of activity on the high street, with its share of overall commercial units declining from 31% in 2019 to 28% by 2021. Other sectors, which have either been classified as "essential" throughout the pandemic, or those where it is less easy to substitute an on-line alternative (retail services, which includes hairdressers for example) have been relatively unscathed. Retail services increased their share of units from 17% to 18%.

The restaurant sector appears to have withstood lockdown relatively well, and there is evidence of new activity in this sector in 2021 with several new restaurants and cafes opening. Between 2020 and 2021, there was a net increase of 14 new restaurants/takeaways and 14 new retail service providers across the Shropshire market towns.

Breakdown of Commercial Units by Type, 2019-2021



Source: Shropshire Council Retail Audit

Vacant Premises

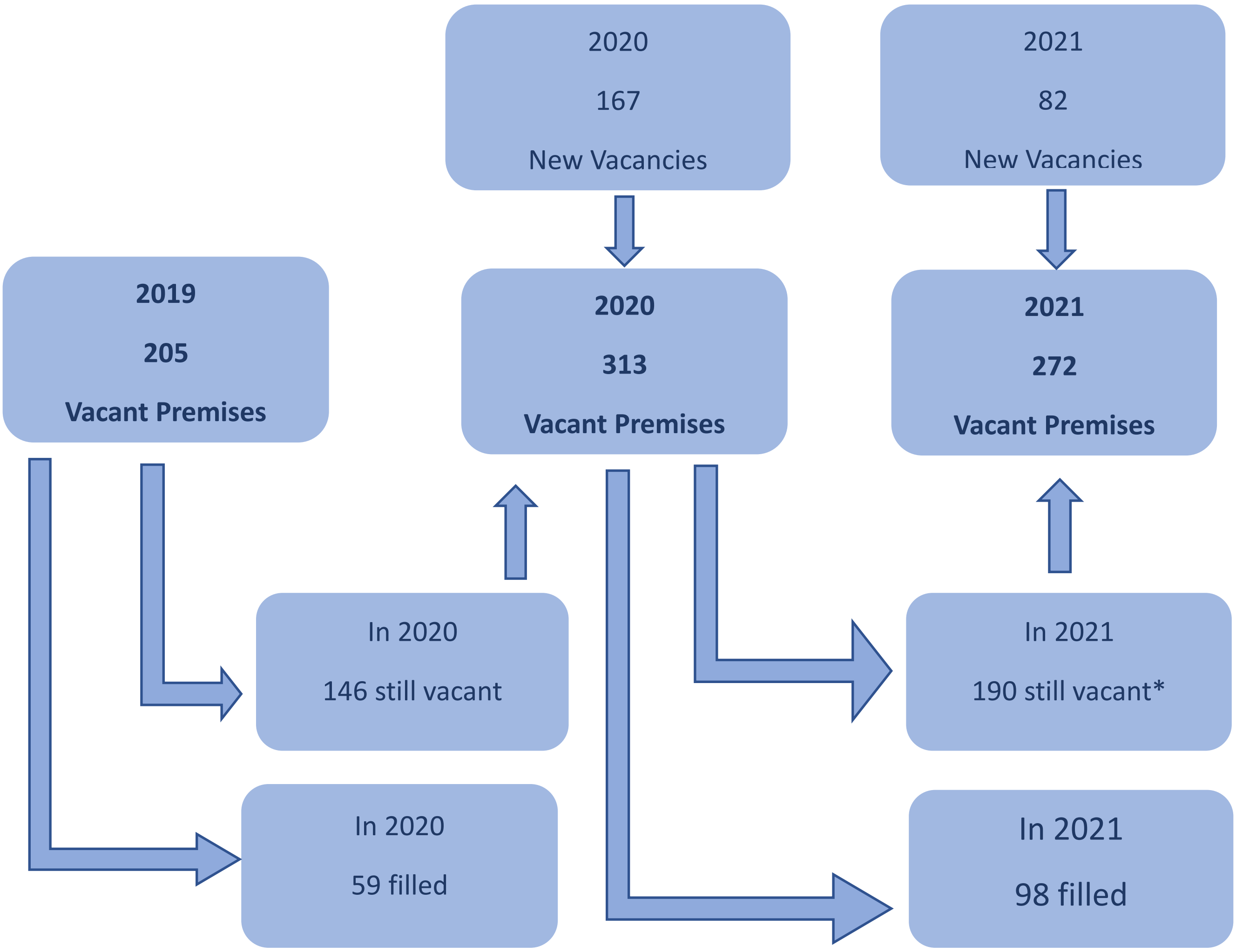
Around 82 premises across the surveyed Shropshire towns have become vacant over the last year. This is around half as many as there were in 2020. A third of new vacancies have been in Shrewsbury – in no other town were there more than nine new vacancies.

In 2021, 98 premises which were vacant in 2020 had been filled; this represents an increase of 39 (+66%) compared with the 59 2019 vacancies that were filled in 2020. 42% of these new occupations were in Shrewsbury.

New vacancies represented 30% of all vacancies in 2021, meaning that seven out of ten vacant units have been unoccupied for at least a year.

Overall, there were 272 vacant units in 2021, down by 41 units compared with 2020. Despite this positive change, there were still 67 more empty premises in 2021 than there were in 2019 pre-pandemic. The number of new vacancies in most towns was lower in 2021 than it had been in 2020.

Trends in Vacancies, 2019-2021

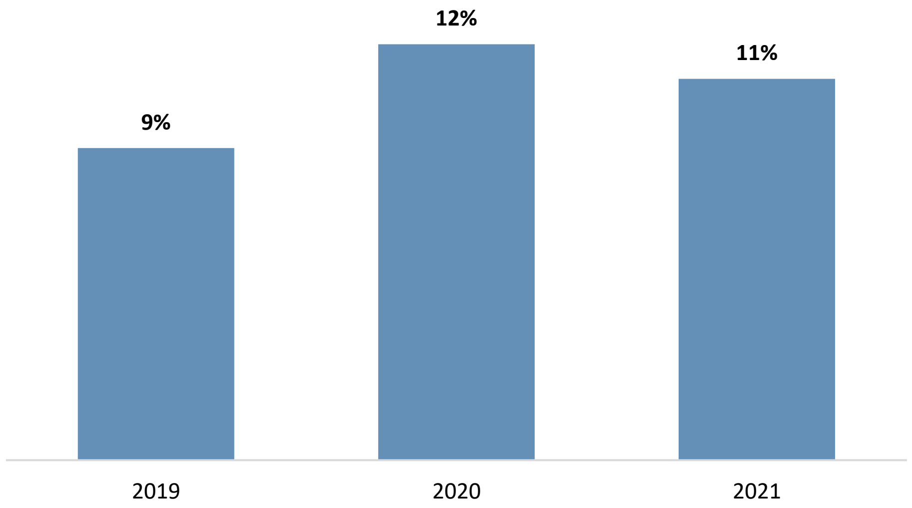


Source: Shropshire Council Retail Audit

Note: Figures may not correlate with those reported previously due to the closure of the Pride Hill Centre in Shrewsbury and also due to considerable change in the configuration of units in the Darwin Centre.

The vacancy rate across all Shropshire towns surveyed rose significantly in 2020 during the height of the Covid-19 pandemic and as a result of the first national lockdown, with 12% of all commercial premises empty, compared with 9% in 2019. There has been a level of recovery in 2021, with the vacancy rate falling back slightly to 11%.

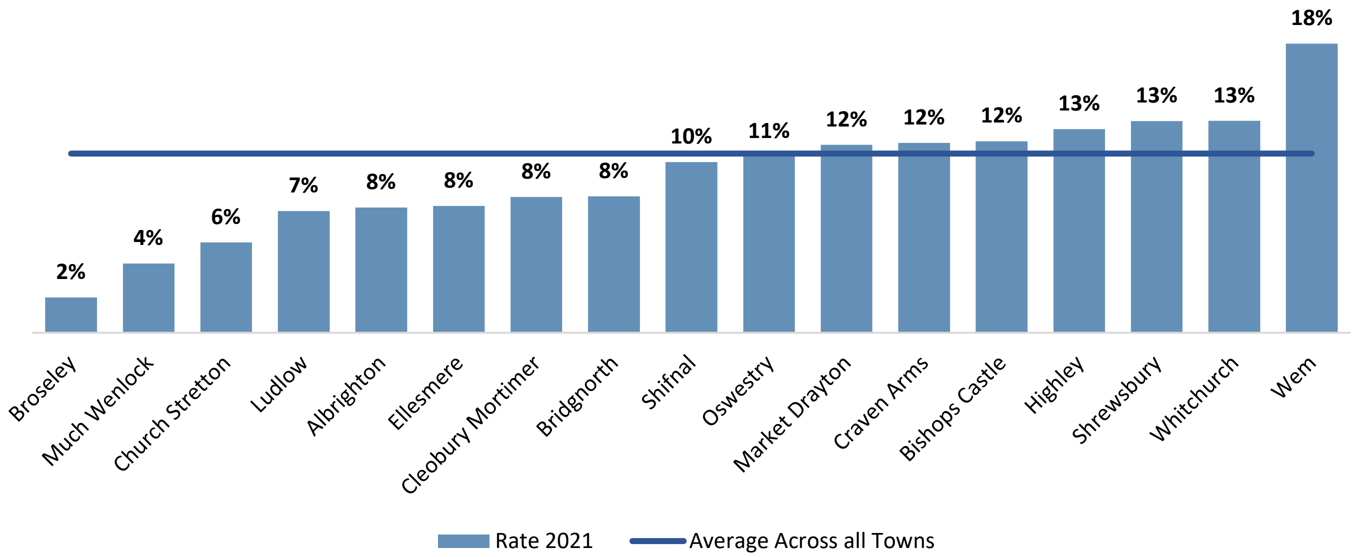
Vacancy Rates, 2019-2020



Source: Shropshire Council Retail Audit

Vacancy rates are higher than average in seven of the towns surveyed – they are significantly higher than elsewhere in Wem (18%) and also stand at 13% in Shrewsbury, Whitchurch and Highley. At the other end of the scale, vacancy rates are lowest in Broseley, Much Wenlock and Church Stretton, and are less than 10% in Ludlow, Albrighton. Ellesmere, Cleobury Mortimer and Bridgnorth.

Vacancy Rates by Town, 2021



Source: Shropshire Council Retail Audit

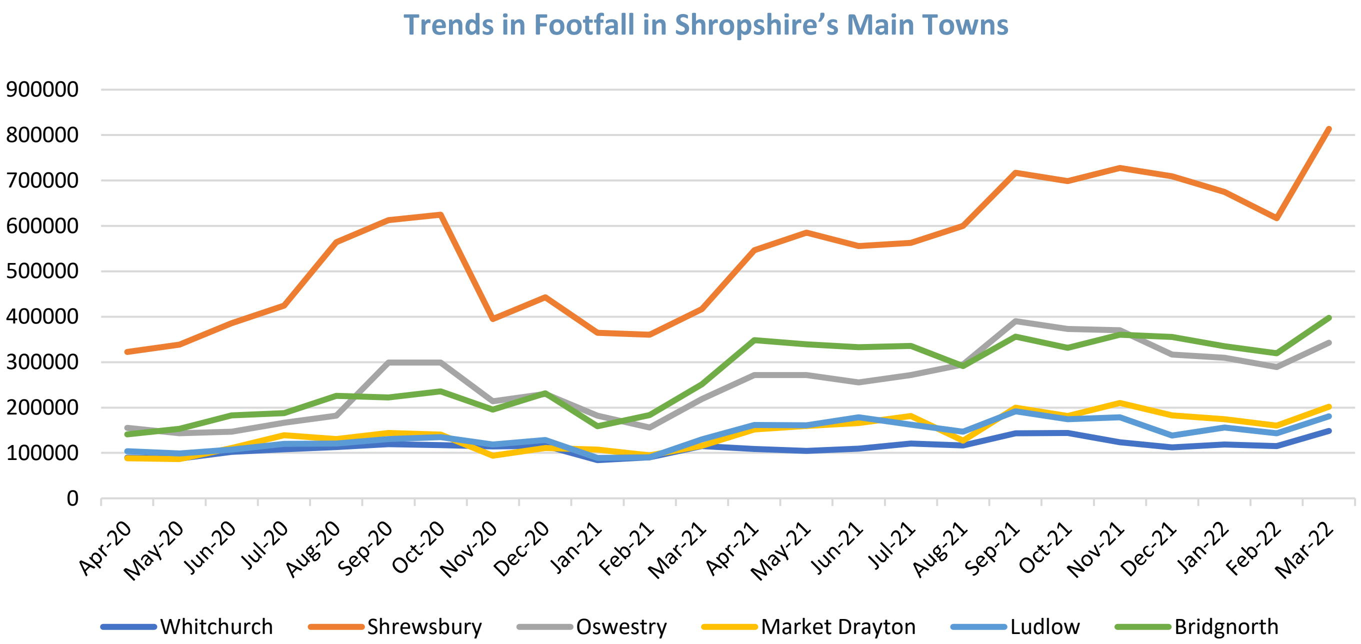
For more information on Shropshire Council's town centre audits, please visit the following web page:

[Shropshire Retail Surveys | Shropshire Council]

Footfall

The health of town centres can also be measured by visitor levels and footfall. This data is captured by Town and Place AI using GPS technology.

The following chart shows monthly footfall for Shropshire's main towns since April 2020.



Source: Town & Place AI

Footfall has been significantly higher in the first quarter of 2022 compared with the same period in 2021, which will in part be attributable to suppressed footfall at the beginning of 2021 due to Covid-19 restrictions.

- Bridgnorth: +150.5%
- Shrewsbury: +84.4%
- Ludlow: +77.3%
- Oswestry: +69.1%
- Market Drayton: +68.9%
- Whitchurch: +31.9%

Core Value: Health & Well-Being

Evidence Relating to:

- **Deprivation**
- **Happiness and Life Satisfaction**
- **Mental Health, Loneliness and Isolation**

Deprivation

Shropshire is a comparatively affluent county, with low levels of unemployment, poverty and crime. However, there are pockets of deprivation, where people are more likely to lack qualifications, be unemployed and/or to claim benefits.

Deprivation is most commonly measured using The Indices of Multiple Deprivation, the latest version of which was undertaken in 2019. This provides a set of relative measures of deprivation for small areas (Lower-layer Super Output Areas) across England, based on seven different domains of deprivation:

- Income Deprivation
- Employment Deprivation
- Education, Skills and Training Deprivation
- Health Deprivation and Disability
- Crime
- Barriers to Housing and Services
- Living Environment Deprivation

The Index of Multiple Deprivation 2019 combines information from the seven domains to produce an overall relative measure of deprivation.

It is important to note that not all deprived people live in areas with high levels of deprivation and, conversely, not everyone living in a highly deprived area is deprived.

In 2019 Shropshire ranked as the **174th** most deprived local authority in England out of a total of **317** lower tier authorities (rank of average score) where a rank of 1 = more deprivation. This compares to a rank of 185 out of 326 local authorities in 2015 and indicates that relatively overall deprivation in Shropshire has increased slightly when comparing it against all LSOAs within England.

An estimated 5% of the Shropshire population live in the 20% most deprived areas of England, while more than half live in the least deprived 50% of the country.

More details on the IMD and each of its domains and sub-domains can be found be following the link below.

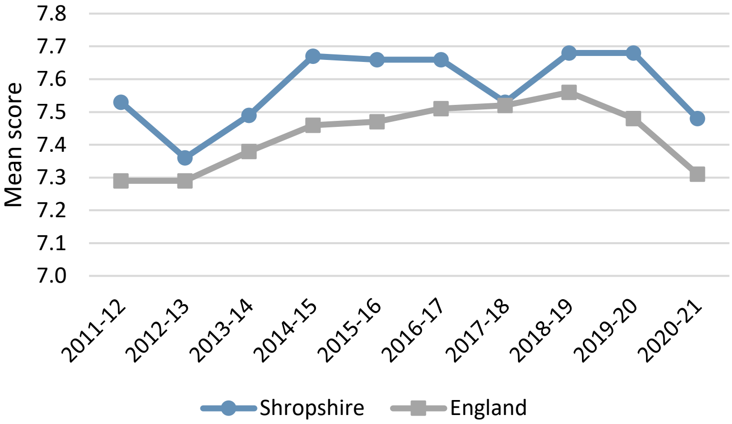
Index of Multiple Deprivation (IMD) - 2019 | Shropshire Council

Happiness & Life Satisfaction

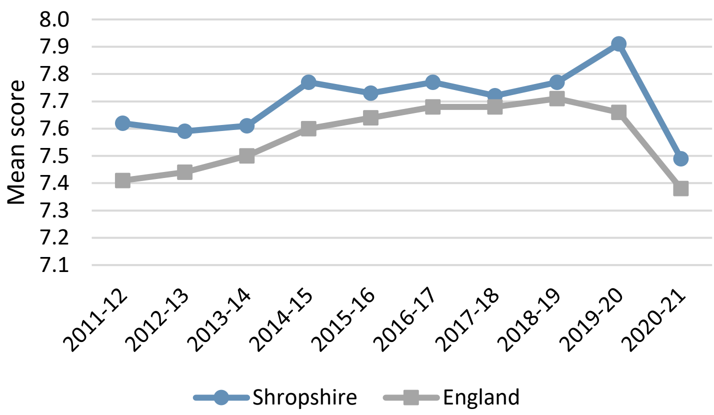
ONS conducts an annual personal well-being survey which askes respondents to rate their level of happiness, life satisfaction, feelings that what they do is worthwhile and levels of anxiety. The following charts show the average score against each criteria for Shropshire and for England.

The data shows that Shropshire residents have persistently rated their levels of happiness, satisfaction and feelings that things are worthwhile at a marginally higher level than their national counterparts, although against all three criteria, the scores have dipped over the last year. In relation to feelings of anxiety, the Shropshire score was almost identical to the national average (3.29 against 3.31), but rose notably in 2020/21.

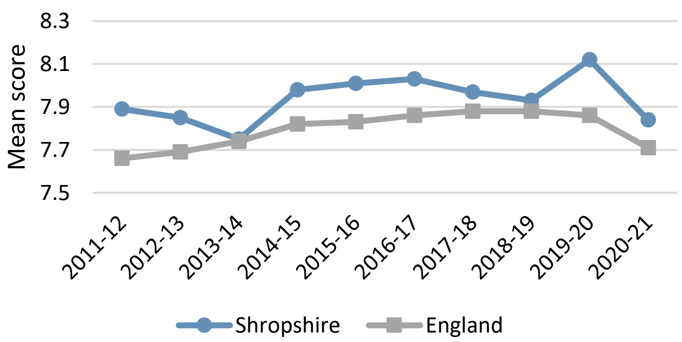
Levels of Happiness



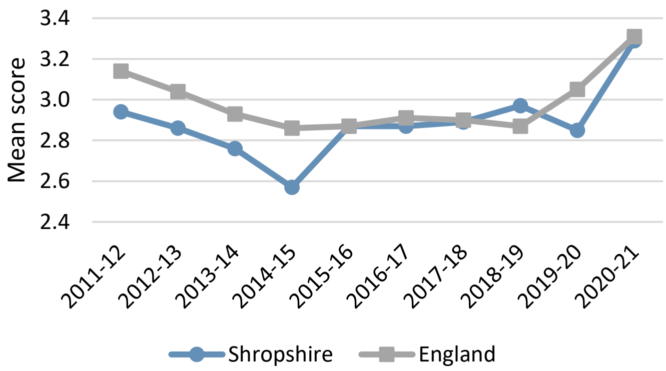
Levels of Life Satisfaction



Feeling Things are Worthwhile



Feelings of Anxiety



Source: ONS Personal Well-Being Survey

Mental Health and Loneliness

The Small Area Mental Health Index (SAMHI) is a composite annual measure of population mental health for each Lower Super Output Area (LSOA) in England.

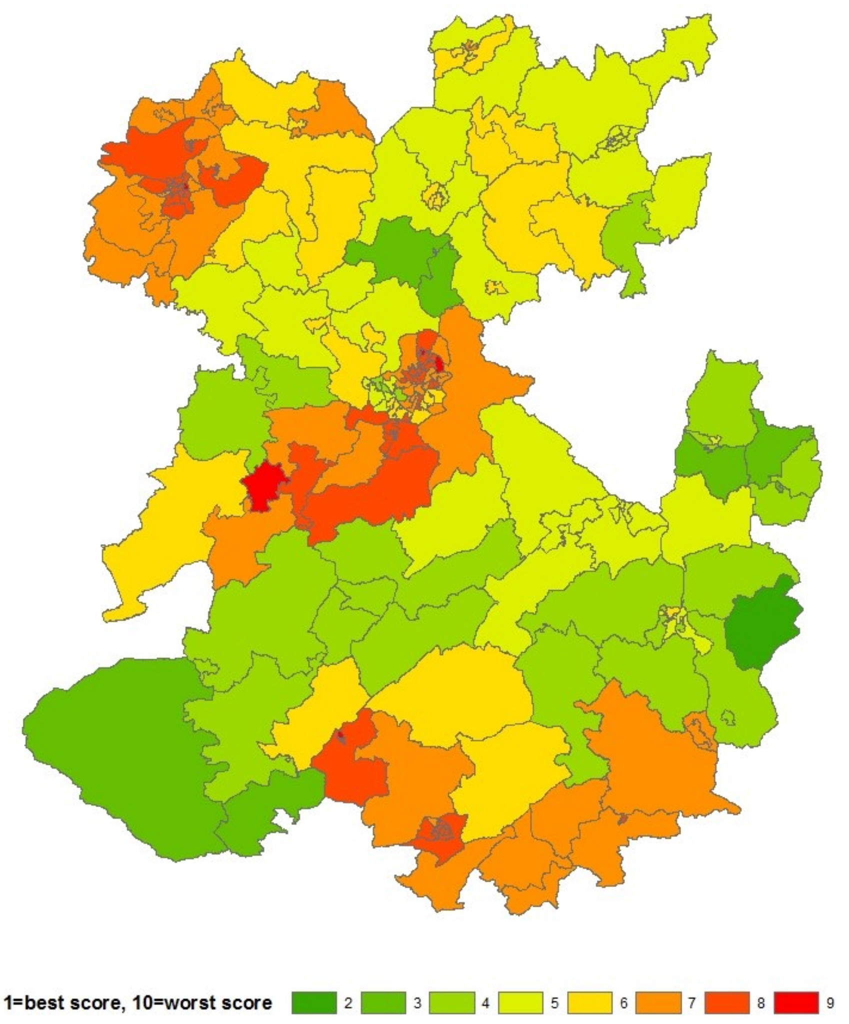
The SAMHI combines data on mental health from multiple sources into a single index including:

- NHS-Mental health related hospital attendances
- GP Patient Survey – Q34 Best describe your own health state today
- Prescribing data – Antidepressants
- QOF – depression
- DWP – Incapacity benefit and Employment support allowance for mental illness

A higher score indicates that an area is experiencing high levels of mental health need.

The following map shows the national decile to which each Shropshire LSOA falls. It is clear that there are parts of central and north west Shropshire where mental health problems are particularly acute.

Small Area Mental Health Index, 2019

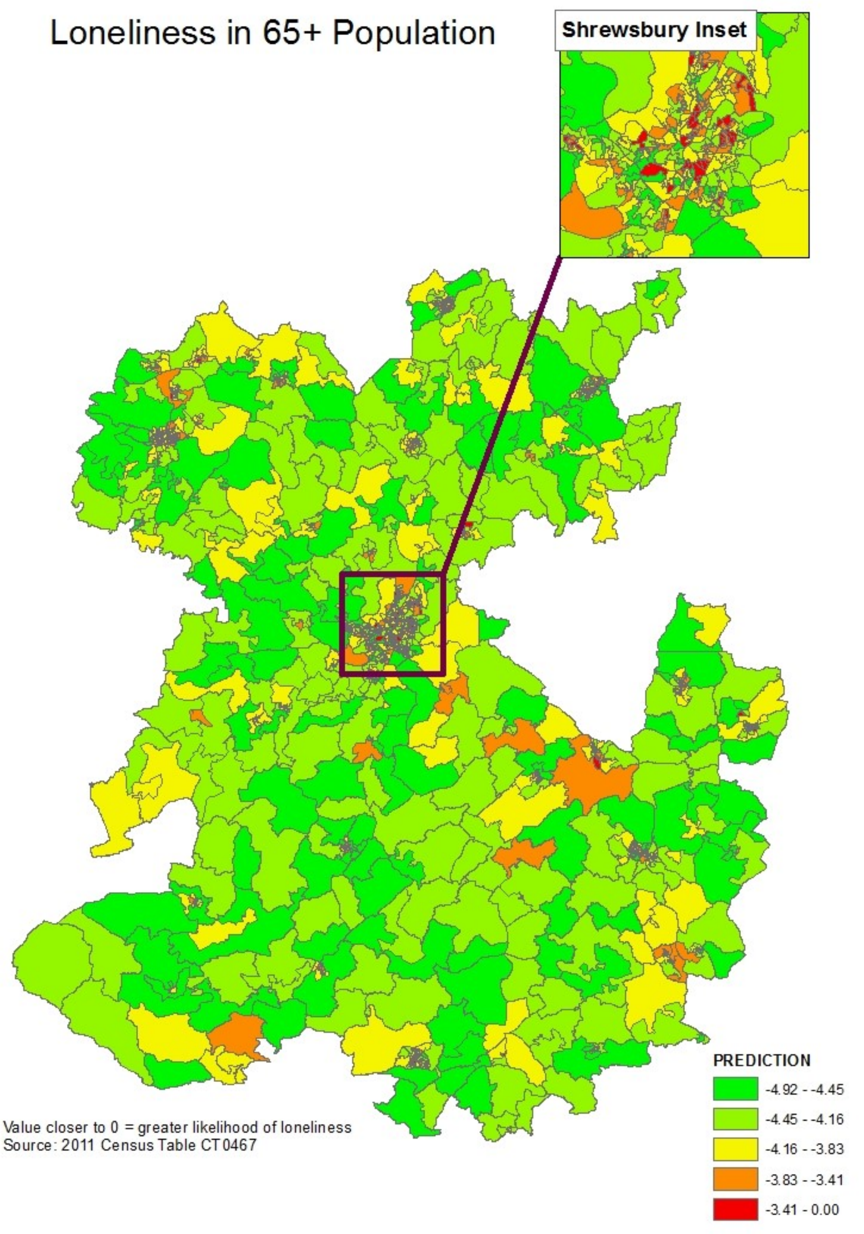


Although feeling lonely isn't in itself a mental health problem, the two are strongly linked, with some research suggesting that loneliness is associated with an increased risk of certain mental health problems, including depression, anxiety, low self-esteem, sleep problems and increased stress. Research has also shown that enforced isolation during parts of the Covid-19 pandemic has led to increased feelings of loneliness.

According to an ONS survey of UK adults which took place nine months into Covid-19 restrictions (late November 2020), one in four (24%) adults in the UK said that they had feelings of loneliness in the previous two weeks.

Young people, the unemployed, full-time students and single parents are all more likely to be lonely, according to each wave of the survey which has been tracking the mental health of the nation since March 2020.

The following map, based on data from the 2011 Census, predicts areas where the 65+ population are most likely to experience loneliness. Perhaps surprisingly, urban locations appear more vulnerable than rural localities.



Core Value: Inclusivity

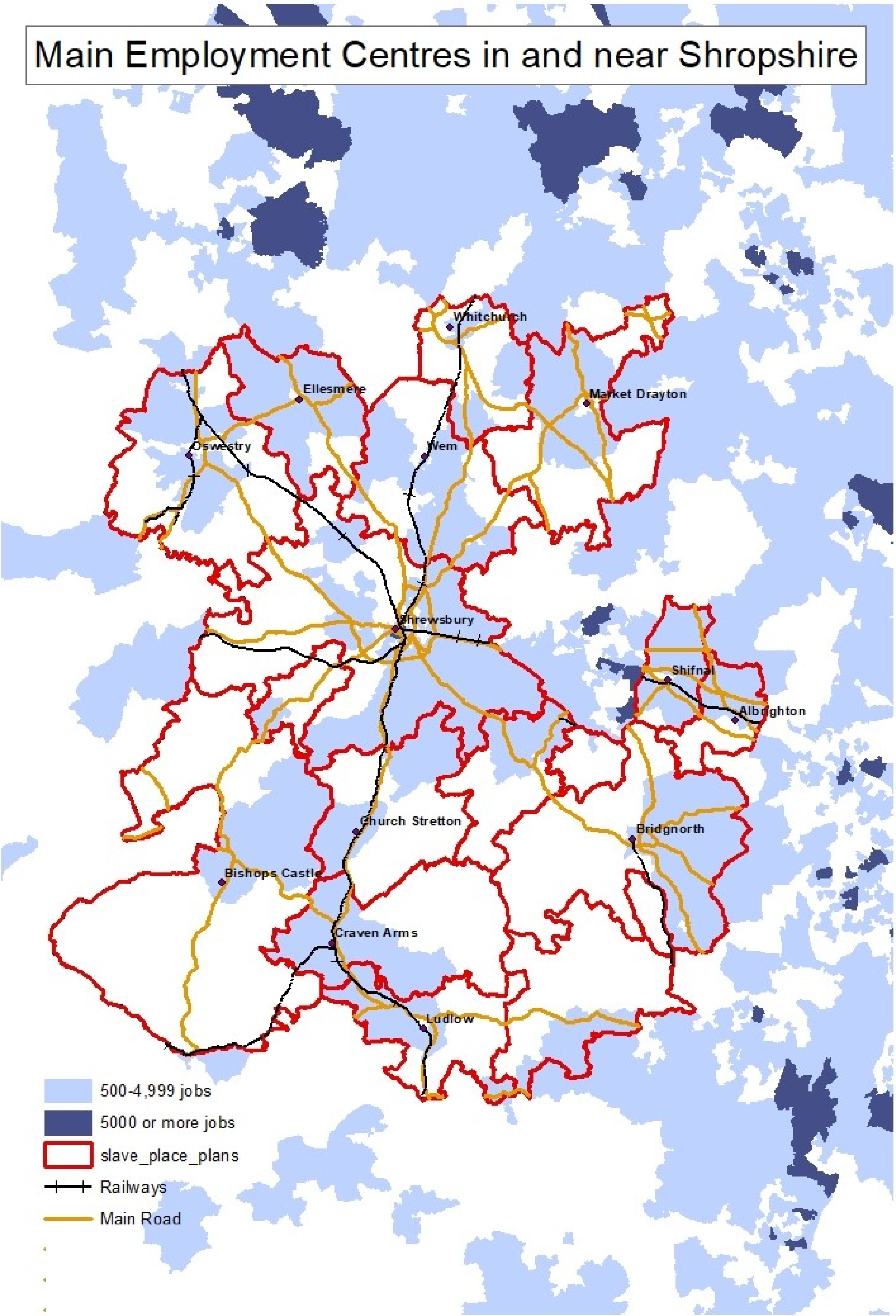
Evidence Relating to:

- Access to Employment
- Access to Health Care
- Access to Education
- Access to Retail & Town Centre
- Digital Connectivity
- Transport Infrastructure

Access to Employment & Services

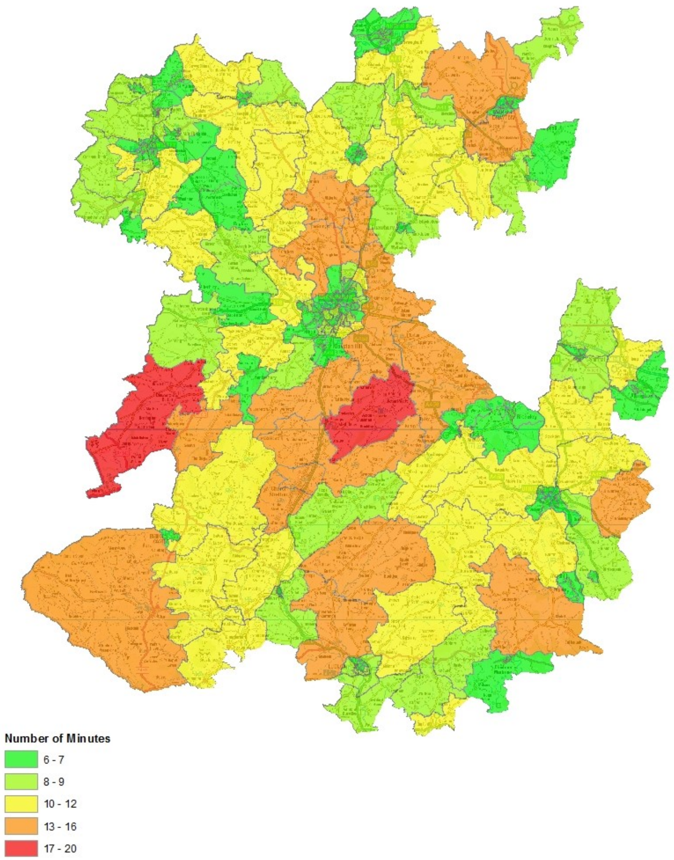
Employment

The map below shows the main employment centres in relation to Shropshire, with the dark blue hot spots indicating a location with at least 5,000 jobs (per LSOA). The only location in Shropshire with such a high density of employment is Shrewsbury town centre.

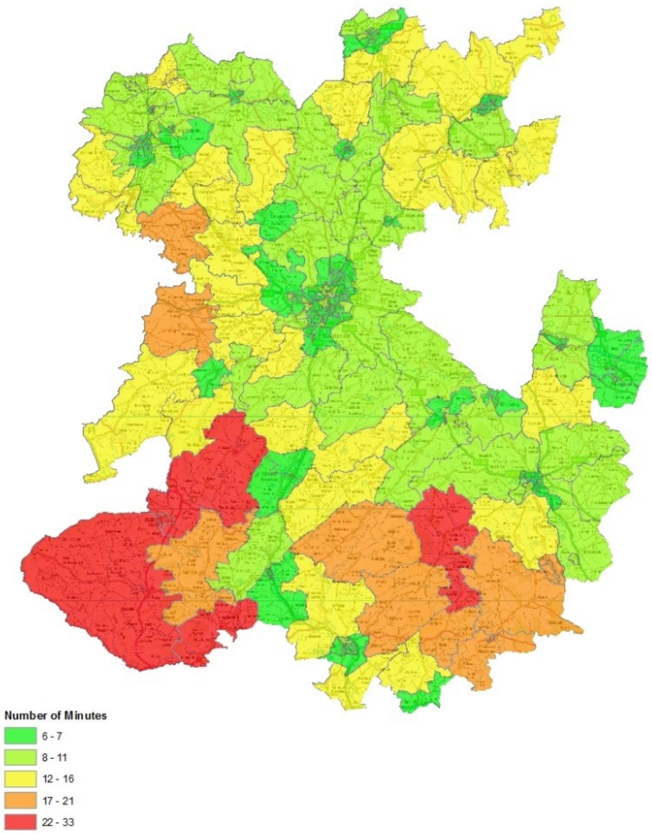


The maps below show how long it takes by car for Shropshire residents to access employment sites with 100-499 jobs, 500-4,999 jobs and 5,000+ jobs. It is evident that those living in central Shropshire, especially those in Shrewsbury and immediate environs, have much easier access to employment than their more rural counterparts. Access to larger employment hubs is particularly challenging in the South West of the county.

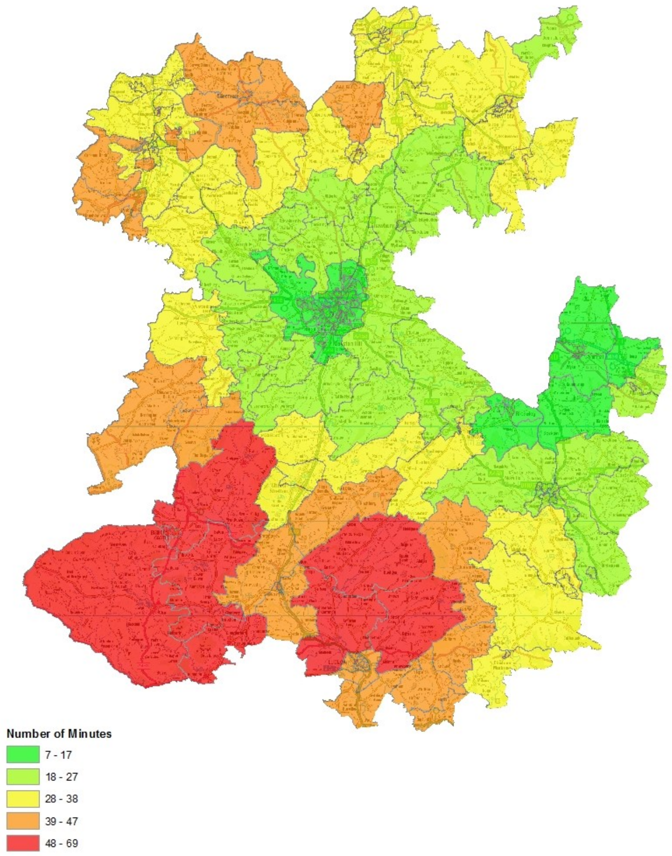
Average Minimum Journey Time
Employment Centre with 100-499 Jobs



Average Minimum Journey Time
Employment Centre with 500-4999 Jobs



Average Minimum Journey Time
Employment Centre with 5000+ Jobs



Source: Department for Transport Journey Time Statistics, 2019

The average journey time by car for Shropshire residents to reach an employment centre with 100-499 jobs is 9 minutes. This rises to 10 minutes to reach an employment centre with 500-4,999 jobs and to 27 minutes to reach an employment centre with more than 5,000 jobs.

On average, journey times are equitable with other rural areas – however the central part of Shropshire has much easier access to large employment centres, particularly in comparison with the south.

The place plan area with the longest journey to an employment centre with 100-499 jobs is Church Stretton (14 minutes). In contrast, the journey time from Broseley, Oswestry and Whitchurch (7 minutes) is on a par with the average for urban areas.

The place plan area with the longest average journey time to an employment centre with more than 5,000 jobs is Bishop's Castle (54 minutes). It is also more than 40 minutes in Craven Arms, Ellesmere and Ludlow.

The two place plan areas with significantly shorter journey times to 5,000+ employment centres are Shrewsbury and Shifnal (both on a par with the average for all urban).

Average Drive Times to Employment Centres by Shropshire Place Plan Area

	Drive time to employment centres (minutes)		
Place Plan Area	100-499 Jobs	500-4,999 Jobs	5,000+ Jobs
Albrighton	8	7	19
Bishop's Castle	13	23	54
Bridgnorth	9	10	23
Broseley	7	7	16
Church Stretton	14	10	31
Cleobury Mortimer	9	20	33
Craven Arms	10	11	47
Ellesmere	9	9	44
Highley	8	18	33
Ludlow	8	9	46
Market Drayton	9	9	31
Much Wenlock	9	9	27
Oswestry	7	9	37
Pontesbury/Minsterley	9	10	28
Shifnal	8	8	14
Shrewsbury	8	8	14
Wem	9	8	31
Whitchurch	7	8	35
Shropshire Average	**9**	**10**	**27**
All Rural	10	10	25
All Urban	7	7	14
England	7	8	16

Source: Department for Transport, 2019

The following tables illustrate the challenge in accessing significant employment centres without access to a car or other motor vehicle. In Shropshire, it takes an average of more than hour to cycle to an employment centre with at least 5,000 jobs, which is twice as long as the national average. Using public transport or walking takes an average of 52 minutes compared with the average of 31 minutes in England.

Average Cycle Times to Employment Centres by Shropshire Place Plan Area

	Cycle time to employment centres (minutes)		
Place Plan Area	100-499 Jobs	500-4,999 Jobs	5,000+ Jobs
Albrighton	11	9	53
Bishop's Castle	23	47	111
Bridgnorth	14	16	59
Broseley	8	9	29
Church Stretton	28	16	78
Cleobury Mortimer	13	41	78
Craven Arms	18	20	119
Ellesmere	14	14	102
Highley	11	41	79
Ludlow	11	14	118
Market Drayton	13	16	87
Much Wenlock	14	13	57
Oswestry	9	14	110
Pontesbury/Minsterley	14	17	56
Shifnal	10	9	31
Shrewsbury	12	10	22
Wem	15	13	66
Whitchurch	10	11	84
Shropshire Average	**13**	**15**	**65**
All Rural	14	16	58
All Urban	8	9	24
England	9	10	30

Source: Department for Transport, 2019

Average Walking/Public Transport Times to Employment Centres by Shropshire Place Plan Area

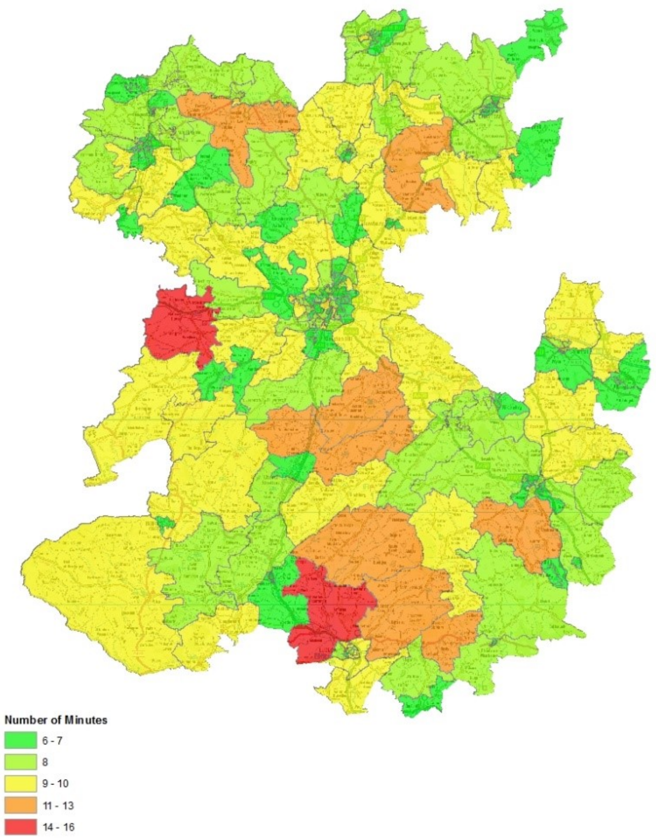
	Walking/public transport time to employment centres (minutes)		
Place Plan Area	100-499 Jobs	500-4,999 Jobs	5,000+ Jobs
Albrighton	18	12	48
Bishop's Castle	34	51	91
Bridgnorth	23	25	67
Broseley	9	11	41
Church Stretton	33	21	51
Cleobury Mortimer	21	48	64
Craven Arms	20	22	68
Ellesmere	20	20	87
Highley	15	34	63
Ludlow	16	18	64
Market Drayton	22	35	85
Much Wenlock	16	13	66
Oswestry	11	16	63
Pontesbury/Minsterley	17	17	46
Shifnal	15	12	42
Shrewsbury	14	11	24
Wem	18	21	50
Whitchurch	12	15	59
Shropshire Average	**17**	**19**	**52**
All Rural	18	20	55
All Urban	7	10	26
England	9	11	31

Source: Department for Transport, 2019

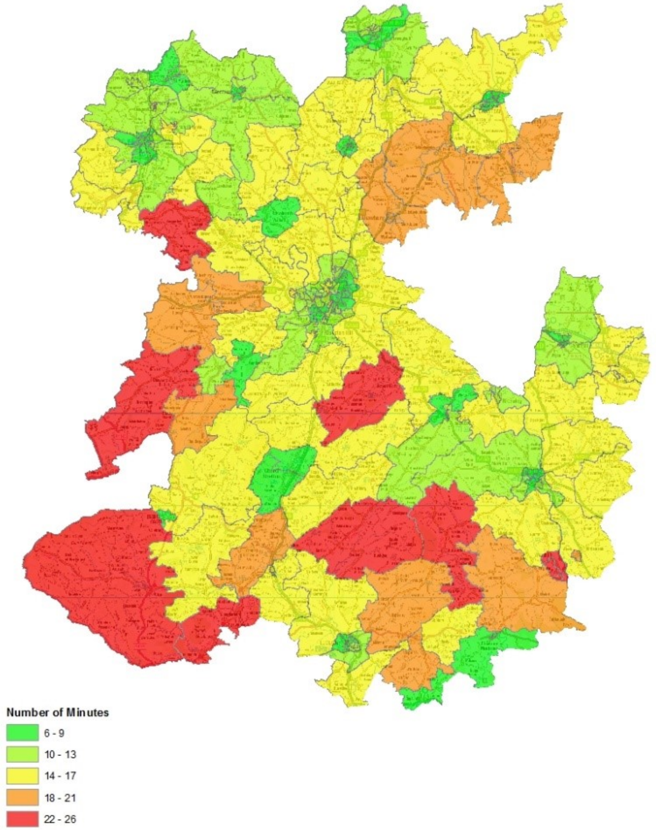
Education

The maps below show how long it takes by car for Shropshire residents to access a primary school, a secondary school and further education. It is evident that those living in central Shropshire, especially those in Shrewsbury and immediate environs, have much easier access to educational facilities than their more rural counterparts. Access is particularly challenging in the South West of the county with regard to access to secondary and further education.

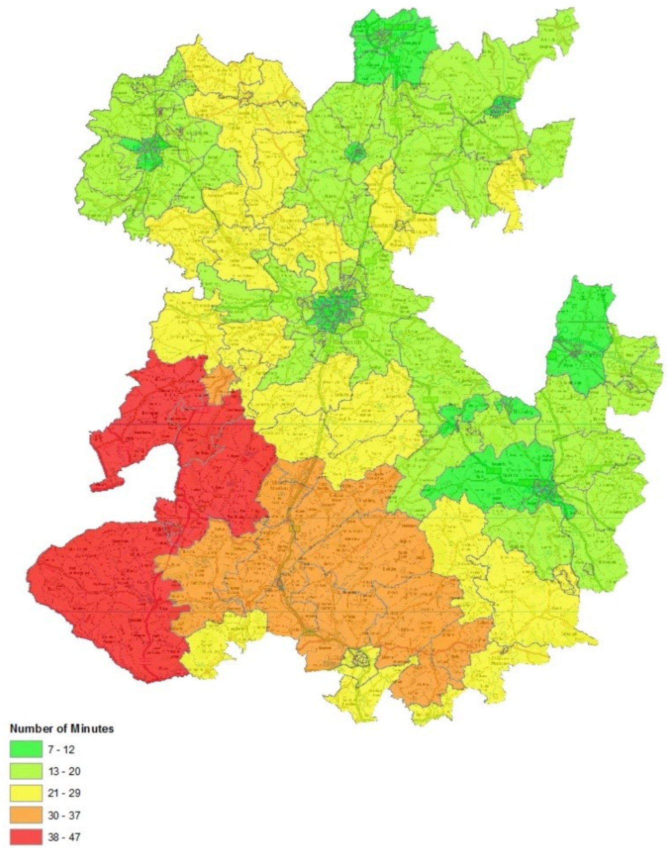
Average Minimum Journey Time
Primary School



Average Minimum Journey Time
Secondary School



Average Minimum Journey Time
Further Education



Source: Department for Transport Journey Time Statistics, 2019

The following tables show the length of time it takes Shropshire residents to reach their nearest primary school, secondary school and higher education.

Due to the number of primary schools across the county, journey times for Shropshire residents are on average not much longer than the national average, especially by car at an average of 8 minutes against 7 minutes nationally.

Average Journey Times to a Primary School by Shropshire Place Plan Area

	Average Journey Time (Minutes)		
	Public Transport/ On foot	Cycling	By Car
Albrighton	19	12	8
Bishop's Castle	17	13	12
Bridgnorth	15	11	8
Broseley	10	9	8
Church Stretton	24	16	10
Cleobury Mortimer	12	10	9
Craven Arms	18	14	9
Ellesmere	16	11	9
Highley	16	12	9
Ludlow	14	11	9
Market Drayton	14	10	8
Much Wenlock	14	11	8
Oswestry	10	9	7
Pontesbury & Minsterley	13	10	10
Shifnal	10	9	8
Shrewsbury	10	10	8
Wem	15	11	8
Whitchurch	13	10	8
Shropshire	**13**	**10**	**8**
Urban	8	8	7
Rural	13	10	8
England	9	9	7

Source: Department for Transport, 2019

The differential between Shropshire and national journey times to secondary education is greater than for primary schools although the difference is marginal by car. Walking or public transport takes significantly longer in Shropshire than in England.

Average Journey Times to a Secondary School by Shropshire Place Plan Area

	Average Journey Time (Minutes)		
	Public Transport/ On foot	Cycling	By Car
Albrighton	32	36	16
Bishop's Castle	55	39	20
Bridgnorth	34	22	13
Broseley	27	20	12
Church Stretton	33	28	14
Cleobury Mortimer	29	19	11
Craven Arms	33	47	18
Ellesmere	26	18	11
Highley	38	40	20
Ludlow	27	21	12
Market Drayton	47	23	13
Much Wenlock	19	17	11
Oswestry	23	19	11
Pontesbury & Minsterley	21	17	11
Shifnal	20	13	9
Shrewsbury	23	17	11
Wem	29	24	13
Whitchurch	26	20	11
Shropshire	**28**	**21**	**12**
Urban	16	12	9
Rural	31	25	14
England	18	14	10

Source: Department for Transport, 2019

The average journey time by car to access further education is 17 minutes compared with 11 minutes for England. Walking or using public transport is also significantly longer, at 37 minutes (21 minutes for England).

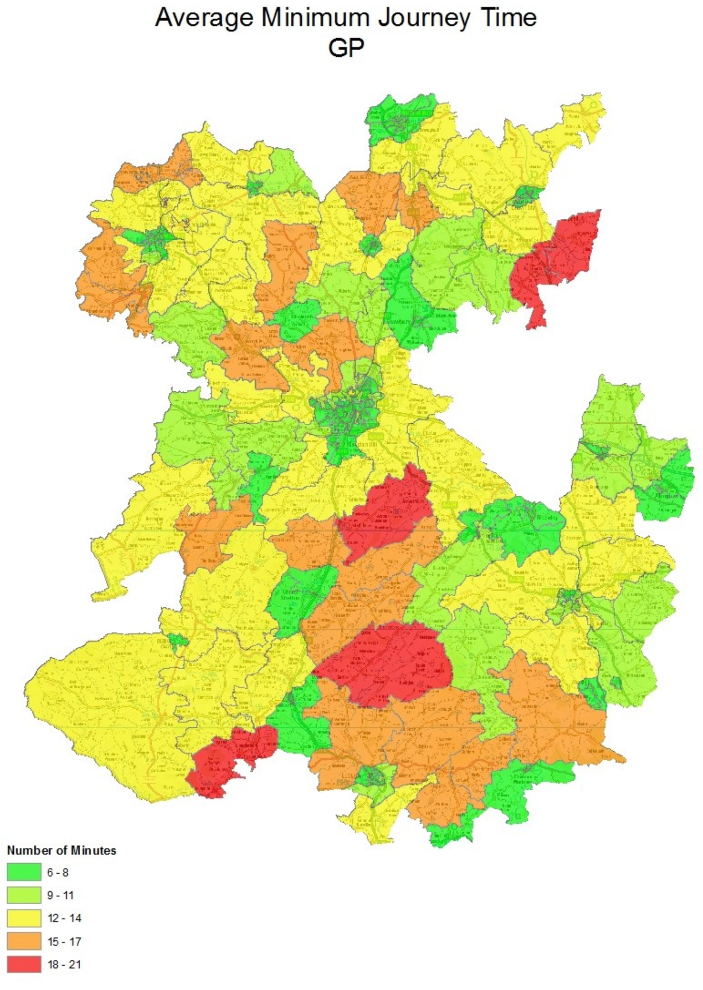
Average Journey Times to a Further Education by Shropshire Place Plan Area

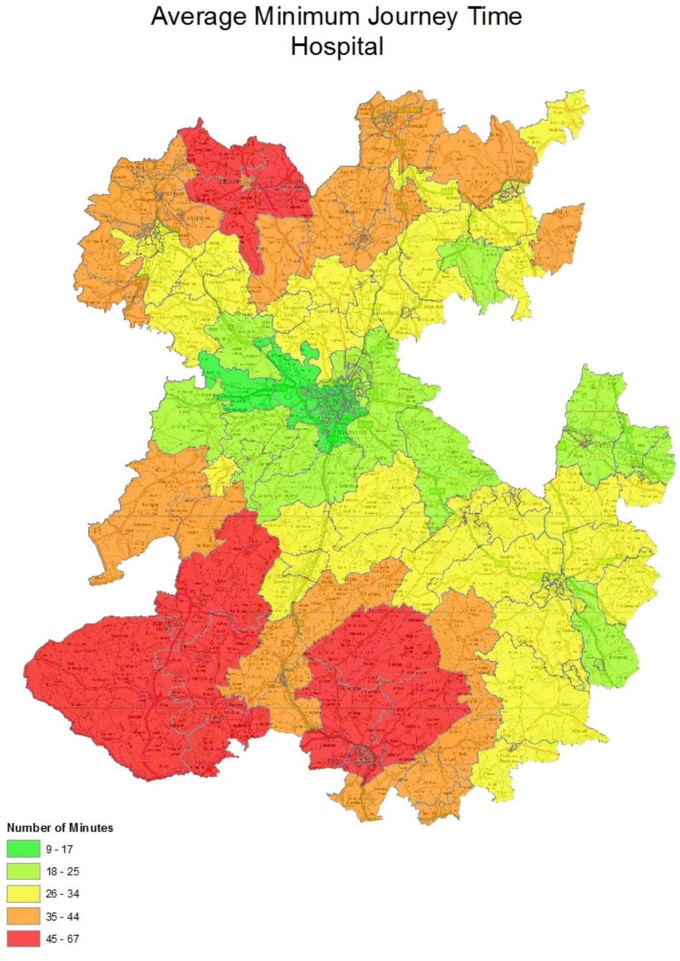
	Average Journey Time		
	Public Transport/ On foot	Cycling	By Car
Albrighton	29	35	16
Bishop's Castle	86	81	37
Bridgnorth	34	23	13
Broseley	27	20	12
Church Stretton	48	59	26
Cleobury Mortimer	58	63	26
Craven Arms	54	73	34
Ellesmere	61	58	24
Highley	35	41	21
Ludlow	52	64	28
Market Drayton	51	26	14
Much Wenlock	20	17	11
Oswestry	31	26	13
Pontesbury & Minsterley	44	55	27
Shifnal	19	13	9
Shrewsbury	28	22	14
Wem	33	27	14
Whitchurch	27	20	11
Shropshire	**37**	**33**	**17**
Urban	18	14	10
Rural	37	32	16
England	21	17	11

Source: Department for Transport, 2019

Health Care

The maps below show how long it takes by car for Shropshire residents to access a GP and a hospital. It is evident that those living in central Shropshire, especially those in Shrewsbury and immediate environs, have much easier access to hospital facilities and that there are areas in the North of the County and in the South West where access is challenging. Access to a GP is easiest in Shrewsbury and the other main market towns.





Source: Department for Transport Journey Time Statistics, 2019

The average journey time to a GP for Shropshire residents is 10 minutes by car; this compares with an average of 8 minutes for England. Public transport or walking takes an average of 20 minutes in Shropshire (13 minutes in England) while cycling takes 15 minutes (11 minutes in England).

Average Journey Times to a GP by Shropshire Place Plan Area

	Average Journey Time		
	Public Transport/ On foot	Cycling	By Car
Albrighton	17	11	8
Bishop's Castle	35	25	14
Bridgnorth	21	14	10
Broseley	10	9	7
Church Stretton	24	20	11
Cleobury Mortimer	27	18	11
Craven Arms	22	22	12
Ellesmere	20	16	10
Highley	17	13	9
Ludlow	18	15	9
Market Drayton	37	18	11
Much Wenlock	12	12	8
Oswestry	19	18	11
Pontesbury & Minsterley	17	15	10
Shifnal	16	11	8
Shrewsbury	15	12	9
Wem	21	14	9
Whitchurch	17	14	9
Shropshire	**20**	**15**	**10**
Urban	11	10	8
Rural	23	18	11
England	13	11	8

Source: Department for Transport, 2019

It takes just under half an hour on average for Shropshire residents to access their nearest hospital, which compares with 20 minutes nationally. Public transport (or walking) takes over an hour, as does cycling.

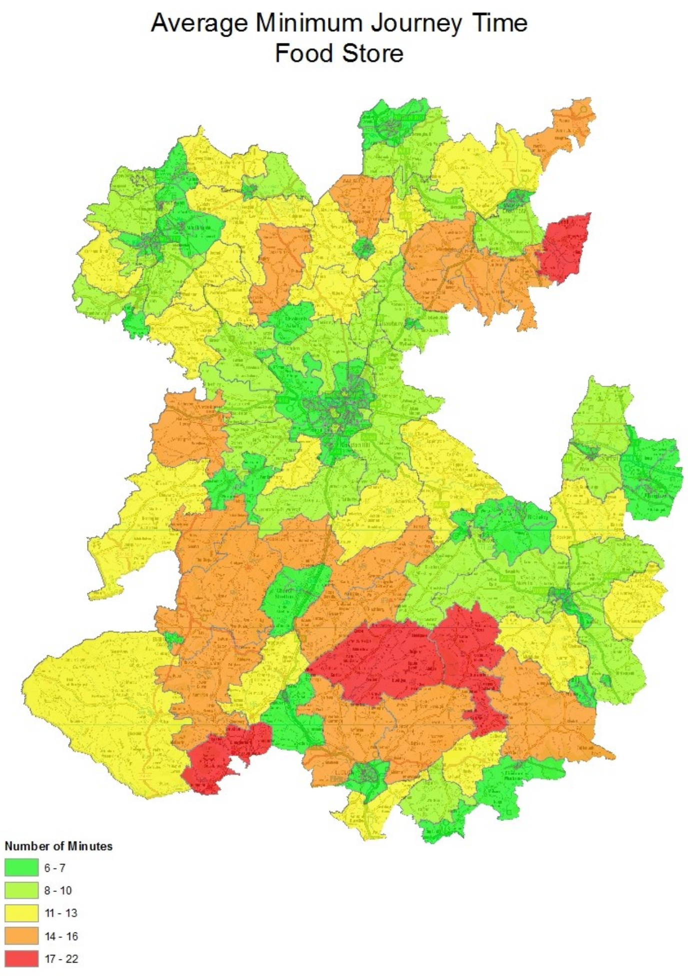
Average Journey Times to a Hospital by Shropshire Place Plan Area

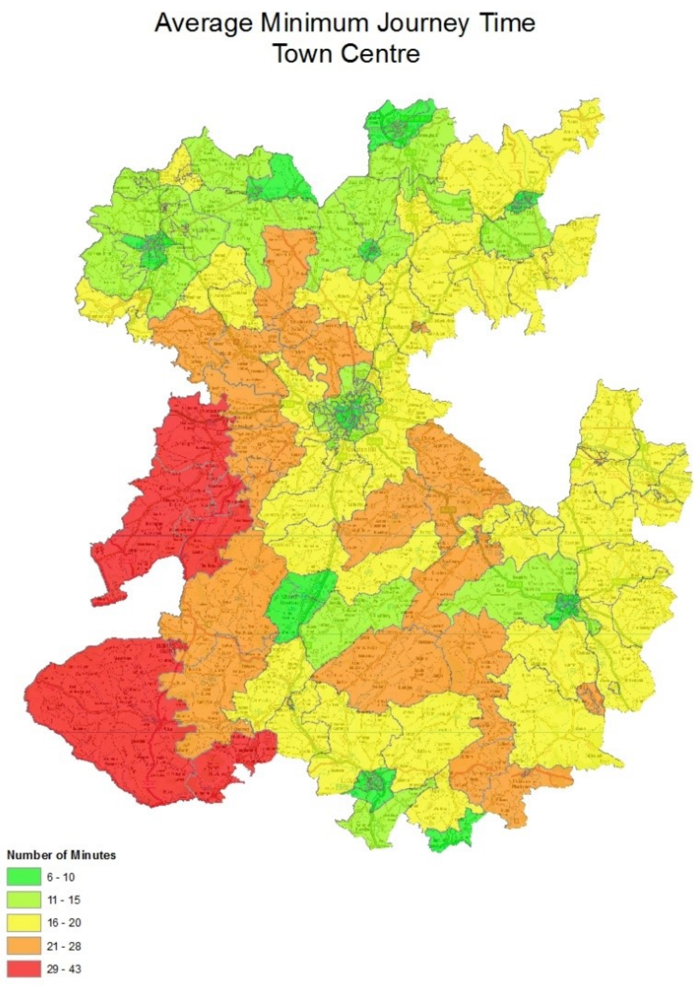
	Average Journey Time		
	Public Transport/ On foot	Cycling	By Car
Albrighton	56	67	24
Bishop's Castle	89	110	53
Bridgnorth	70	83	30
Broseley	91	62	29
Church Stretton	71	87	31
Cleobury Mortimer	54	71	30
Craven Arms	79	120	46
Ellesmere	89	108	44
Highley	56	79	33
Ludlow	61	117	46
Market Drayton	91	91	31
Much Wenlock	82	73	31
Oswestry	70	103	35
Pontesbury & Minsterley	35	49	24
Shifnal	52	55	22
Shrewsbury	38	28	17
Wem	69	79	36
Whitchurch	79	102	38
Shropshire	**61**	**71**	**29**
Urban	36	31	18
Rural	66	67	29
England	41	38	20

Source: Department for Transport, 2019

Retail Services

The following maps show how long it takes by car for Shropshire residents to access a food store and a town centre. It takes longer to access a town centre for those living in the west of the County than those in central or eastern locations.





Source: Department for Transport Journey Time Statistics, 2019

It takes slightly longer for Shropshire residents to get to a food store by car (8 minutes) than for their national counterparts (7 minutes). By other means of transport the differential is substantial.

Average Journey Times to a Food Store by Shropshire Place Plan Area

	Average Journey Time		
	Public Transport/ On foot	Cycling	By Car
Albrighton	12	9	7
Bishop's Castle	33	24	13
Bridgnorth	22	14	9
Broseley	8	8	7
Church Stretton	22	17	10
Cleobury Mortimer	25	16	10
Craven Arms	21	22	12
Ellesmere	19	15	9
Highley	16	12	8
Ludlow	13	11	8
Market Drayton	34	17	10
Much Wenlock	12	12	8
Oswestry	12	11	8
Pontesbury & Minsterley	12	10	7
Shifnal	12	9	7
Shrewsbury	9	9	7
Wem	20	14	9
Whitchurch	12	11	8
Shropshire	**16**	**12**	**8**
Urban	7	8	7
Rural	17	14	9
England	9	9	7

Source: Department for Transport 2019

It takes an average of 14 minutes to reach the nearest town centre by car in Shropshire compared with 11 minutes in England. It takes about twice as long using alternative means of transport (29 minutes by public transport or by walking and 26 minutes by cycling).

Average Journey Times to a Town Centre by Shropshire Place Plan Area

	Average Journey Time		
	Public Transport/ On foot	Cycling	By Car
Albrighton	39	54	19
Bishop's Castle	71	82	36
Bridgnorth	33	23	13
Broseley	30	36	19
Church Stretton	26	22	12
Cleobury Mortimer	44	47	22
Craven Arms	35	49	20
Ellesmere	22	18	11
Highley	36	42	21
Ludlow	20	15	10
Market Drayton	44	21	12
Much Wenlock	43	51	20
Oswestry	21	21	12
Pontesbury & Minsterley	45	56	27
Shifnal	33	30	16
Shrewsbury	24	21	14
Wem	26	23	12
Whitchurch	17	14	9
Shropshire	**29**	**26**	**14**
Urban	17	14	10
Rural	35	33	16
England	20	17	11

Source: Department for Transport 2019

Digital Connectivity

87% of premises in Shropshire have access to broadband with downloads speeds of at least 30 Mbit/s (superfast) which compares with 96% of premises in England. Coverage is superior in urban localities (97% of premises covered compared with 70% in rural locations). 6% of premises in Shropshire are still not capable of achieving speeds of 10 Mbit/s against just 1% of premises across England. 16% of premises in rural locations in Shropshire are unable to access broadband speeds of at least 10 Mbit/s compared with 1% of premises in the urban parts of the county.

23% of Shropshire premises can access ultrafast broadband (speeds of 100 Mbit/s or over) compared with 66% of premises in England. While 38% of premises across the nation are Gigabit capable, just 11% are in Shropshire.

Access to Fixed Broadband, 2021

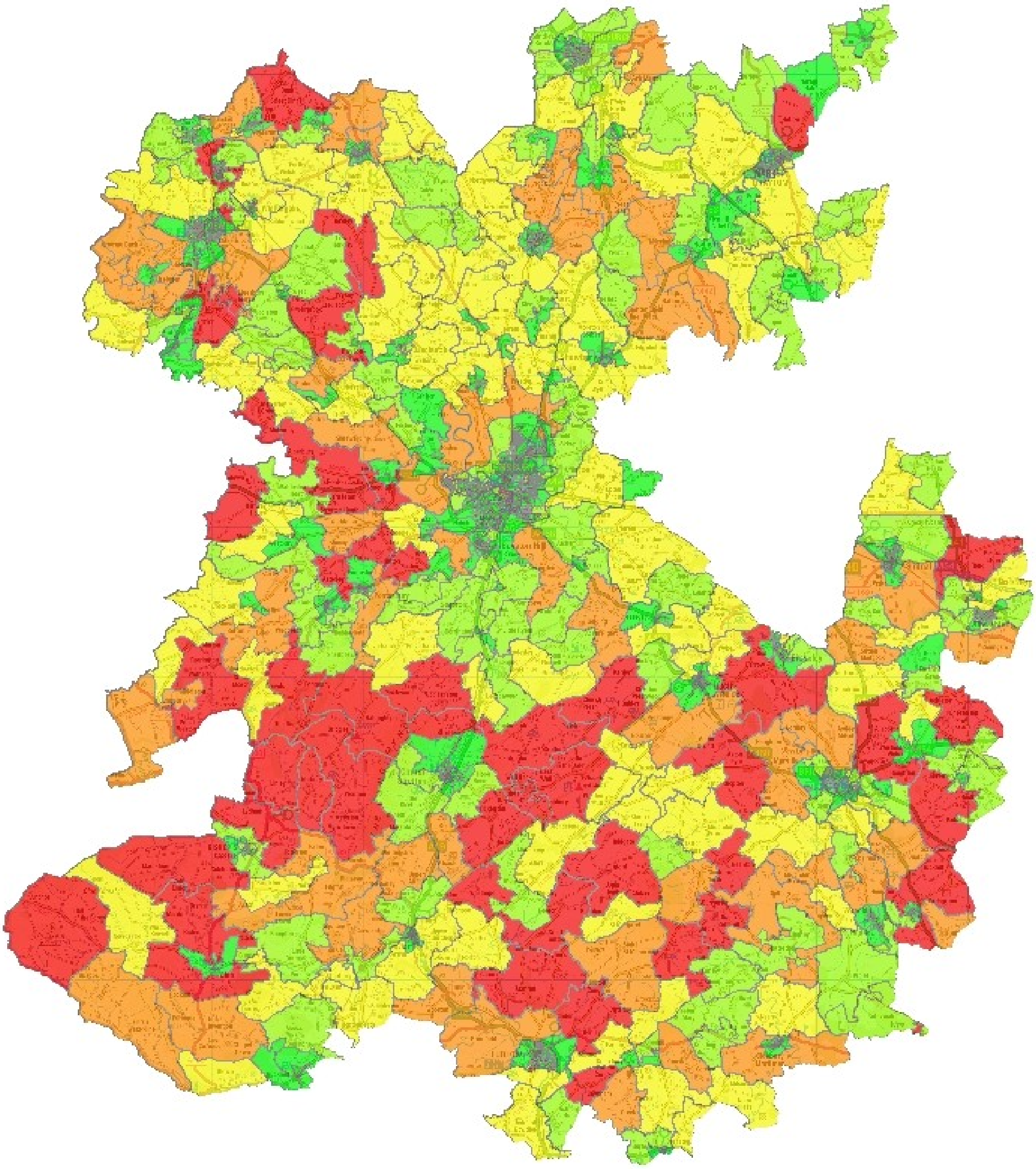
	Shropshire	England
<10 Mbit/s	6%	1%
>= 10 Mbit/s	94%	99%
>= 30 Mbit/s	87%	96%
>= 100 Mbit/s	23%	66%
>=300 Mbit/s	17%	64%
Gigabit Capable	11%	38%
Full Fibre	11%	23%

Source: Ofcom Connected Nations, May 2021

The proportion of Shropshire premises which are able to access superfast broadband speeds has risen from 85% in January 2019, while the proportion of premises unable to access speeds of at least 10 Mbit/s has fallen from 7%.

The following maps show the proportion of premises across Shropshire which have access to superfast and ultrafast broadband.

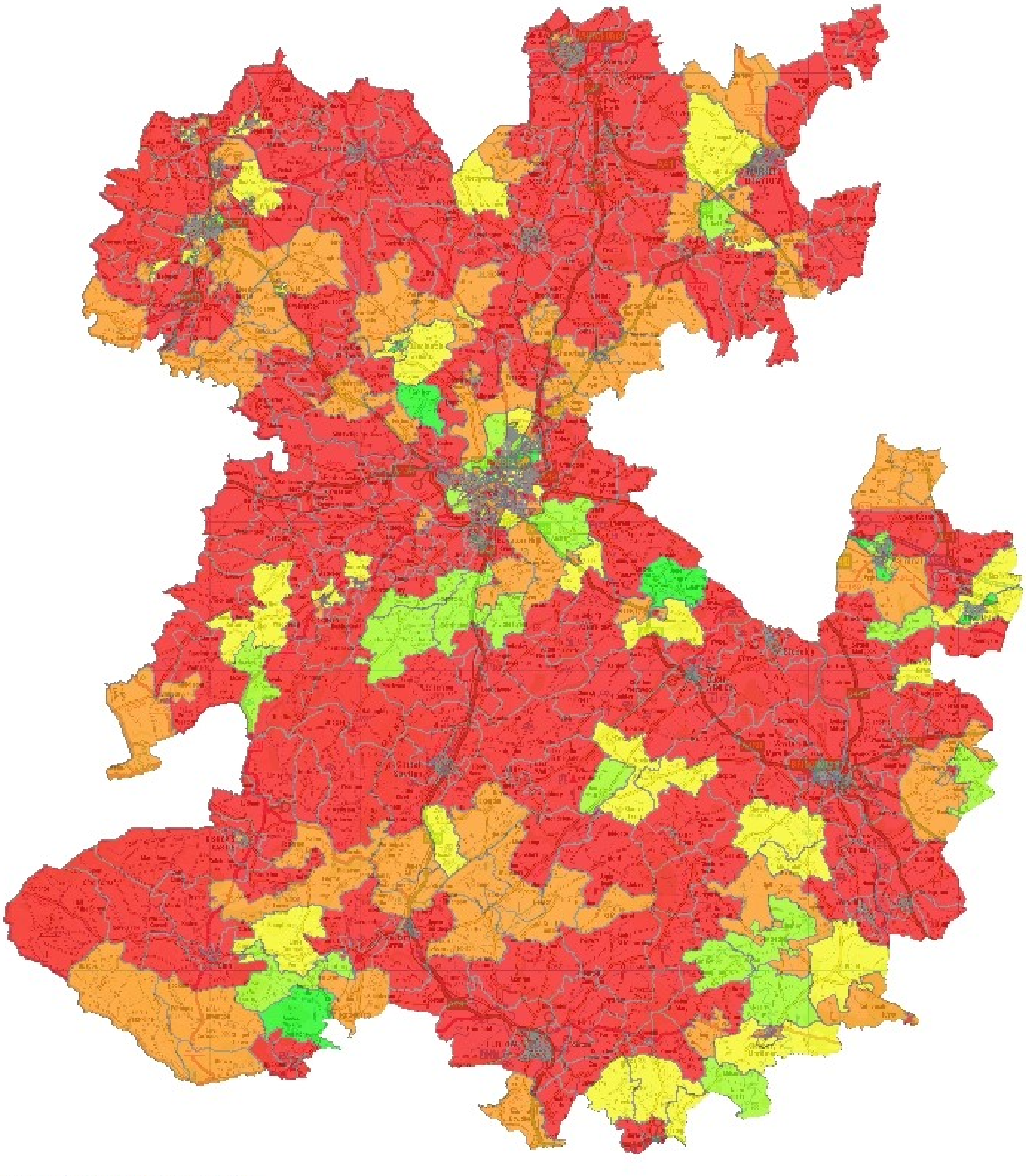
Percentage of Premises with Access to Superfast Broadband, 2021



SFBB availability (% premises)

- 0.0 - 21.3
- 21.4 - 48.4
- 48.5 - 70.4
- 70.5 - 90.0
- 90.1 - 100.0

Percentage of Premises with Access to Ultrafast Broadband, 2021



UFBB availability (% premises)

- 0.0 - 8.2
- 8.3 - 26.9
- 27.0 - 52.2
- 52.3 - 78.0
- 78.1 - 100.0

Transport Links

Shropshire has strong transport links to the West Midlands conurbation via the M54 motorway. The main trunk roads through Shropshire are the A49 and the A5. Shrewsbury is the main rail hub in Shropshire, with lines to Manchester, Wales, and eastwards to Birmingham and on to London. The map below shows the main road and rail links in the County.

Main Road and Rail Links in Shropshire