

QUARTERLY ECONOMIC BULLETIN

An Economic Summary for Herefordshire

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There is not a house price article this quarter as the data has not been updated. Please contact the Research Team on 01432 383069 for more information. If the information is published before the next quarter, the article will be published electronically at www.herefordshirepartnership.com/qer

Key Points for Herefordshire:

- Current estimate of resident population is 177,800 (page 7).
- Herefordshire has seen an increase in National Insurance Number registrations from overseas nationals since May 2004 (page 8).
- Number of unemployed claimants during July 2007 has decreased from last quarter and this time last year but increased by 32 claimants from last month (page 3).
- Total agricultural labour force has increased by 18% since 2000 (to of 11,000 people in 2006) (page 4).
- Net farm incomes have decreased by 47% from £7,402 per farm in 2004/05 to £3,921 in 2005/06 (page 6).

NEWS

SOURCED FROM LOCAL PRESS

Job Creation

A plan to bring 400 new jobs to the county – many of them in high-tech research and development sectors – has been revealed. Several companies are already lined up as potential tenants of three state-of-the-art business centres being built in Ross-on-Wye, Hereford and Leominster, with £5.9 million worth of funding from regional development agency Advantage West Midlands (AWM). The centres will have space for at least 75 firms to operate across a range of industries, with the emphasis on e-business and research and development.

Since the last issue, the Redundant Buildings Grant Scheme has awarded a grant of £62,500 to Albatross Glass Fibre Products, for the refurbishment of a building on Rotherwas Industrial Estate, which has been empty for 7 years. This will allow the company to relocate from four units to one large unit and enable it to expand and create 9 new jobs.

A grant of £25,000 has been awarded to convert a barn at Tyrrells Frith Farm near Ledbury to provide a reception/recreational centre, tearoom, meeting/conference facility and 2 studios. The new facility will enhance the existing business (Woodside Lodges holiday accommodation) and create up to 6 new jobs.

Ross Labels has been given the go-ahead for a scheme to develop a site next to Ross Spur. The scheme, which will provide a new office block and storage unit for wholesale warehousing and storage, could bring more than 100 jobs to Ross-on-Wye.

NEWS (CONT.)

Job Losses

Leominster based cosmetics manufacturer SLG Beauty is set to relocate to larger premises in Gloucester. The company, which has provided employment in Leominster for 60 years, employs 65 workers. The current workforce will be offered jobs at the new site and free transport to and from the new facility in Gloucester.

Development and Investment

Ross-on-Wye based company Peter Gordon Lawrence (PGL), which specialises in children's adventure holidays, has been sold for £100 million. PGL is set to become part of Holidaybreak PLC, joining brands such as Eurocamp, Superbreak and Explore. PGL is one of the main employers in Ross, with over 150 staff employed at the head office in Alton Court, Penyard Lane. The deal should ensure additional employment opportunities in the future.

Holden Aluminium Technologies Ltd (HAT) has announced its acquisition of automotive product manufacturer Hydro Aluminium Worcester Ltd (HAW). HAT, based in Bromyard supplies products to medical, construction and transport industries, including Aston Martin, BMW, Jaguar and Land Rover.

South Herefordshire software firm Muddy Boots Software have completed a £1.5 million deal to sell its software to Persil manufacturer Unilever. The deal, one of the biggest in the Phocle Green-based firm's history, will create several more jobs around the county.

A new TEN-PIN bowling centre has opened at The Grove Golf Centre, Ford Bridge, near Leominster. The eight-lane bowling alley, which has been built into a hillside, includes a bar, dining area and small dance floor. The venue was designed and built by more than 20 local firms based within a 15-mile radius of The Grove.

Health and Social Care

West Midlands Ambulance Service, will spend £1.6 million on training 130 new paramedics in the next 12 months. The paramedics will be shared across the West Midlands area, with 12 being allocated to the Hereford and Worcester district.

Housing

Over 100 new homes in a canal-side setting are being planned for Hereford. The scheme, for part of Hereford's Holmer trading estate, also includes offices, warehouses and industrial units – with major restoration of a section of the Herefordshire and Gloucestershire Canal.

Tourism

A new support fund, set up by the Association for the Promotion of Herefordshire (APH), is being launched to help tourism projects around the County. APH is using the last of its funds to support worthy causes, the criteria for which will be published in September.

Agriculture and Environment

Businesses are counting the cost of flooding across Herefordshire. Local businesses have been contacted by the Herefordshire and Worcestershire branch of the Chamber of Commerce to assess the impact of the severe weather. The impact on small businesses was dramatic, with some having to operate with fewer staff, as people could not get to work. Businesses that distribute products or services had to plan routes out of the county to visit clients in the rest of the country and those that were open saw fewer customers as people stayed at home.

Engineers from Capita Symonds, leading experts in flood alleviation schemes, have been working with Edgar Street Grid (ESG) Herefordshire Ltd to come up with plans to prevent the recent flooding of parts of the area designated for a multi-million pound redevelopment. Options currently under consideration include diverting floodwater from the Yazor brook before it reaches Hereford and creating floodwater storage ponds upstream.

Information for this news article have been sourced from local press, mainly the Hereford Times.

UNEMPLOYMENT

This article shows levels and trends of unemployment in Herefordshire. The Office for National Statistics (ONS) supplies data on numbers and rates of unemployment (% of the working age population claiming unemployment benefits), the age of those who are unemployed and duration of their unemployment. The following is a summary of the key information from **July 2007**. All figures are unadjusted for seasonal variation unless otherwise stated.

In July 2007:

1,405 people were claiming unemployment benefit in Herefordshire, a slight increase from 1,373 during the previous month but down from 1,513 claimants during the last quarter (April 07). The unemployment rate was 1.3%, down from 1.5% in April 07, (West Midlands 3.1% and England 2.3%).

Over two thirds of claimants were male (69%).

Unemployment in Ledbury, Bromyard and Kington was low (61, 48 and 25 claimants respectively), with little change in levels compared to this time last year.

Unemployment in Hereford City has decreased significantly over the year dropping from 750 to 591 claimants. Unemployment in Leominster (134) and Ross-on-Wye (153) has also decreased from the figures recorded this time last year (162 and 164 respectively).

Wards with the highest unemployment were St Martins & Hinton (150 claimants), Belmont (144) and Ross-on-Wye West (101). Numbers of claimants in Belmont and St Martins & Hinton have decreased from July last year, (185 to 144 claimants in Belmont and 192 to 150 in St Martins & Hinton), whereas unemployment in Ross-on-Wye West has remained at similar levels from July 06 (103).

Unemployment claimant figures are released at smaller geographical areas (i.e. below ward level) which allow more detailed mapping of where clusters of unemployment are within Herefordshire.

Higher proportions of unemployment claimants are found in parts of Hereford City, Bromyard, Ross-on-Wye, some areas (SOAs) around Leominster and a SOA which includes the parishes of Blakemere, Moccas, Preston-on-Wye, Peterchurch and Tyberton. The John Kyrle area of Ross-on-Wye has the highest proportion of unemployment claimants (4.4% of all claimants in October 06).

	July 2007			A year ago (July 2006)
	Total	Male	Female	
Herefordshire	1,405	971	434	1,617
	1.3%	1.8%	0.9%	1.6%
West Midlands	3.1%	4.3%	1.7%	3.4%
England	2.3%	3.2%	1.3%	2.6%

Source: Office for National Statistics Monthly Unemployment Claimant Counts, Herefordshire Council Research Team

Age and duration of claimants

The highest proportion of unemployment claimants were those aged between 25 and 49 years who have been unemployed for less than 6 months (38%).

The majority of all claimants have been unemployed for less than 6 months (75%), which is a slight decrease from this time last year (July 2006 – 76%). Consequently there has been a slight increase in unemployment claimants claiming for longer than 6 months..

53% of all claimants are aged between 25 and 49 years.

29% of unemployment claimants were 'Youth unemployment' (those aged under 25 years) which is the same as it was in July 2006 despite small fluctuations throughout the year.

'Click here for the full article' - please note this opens a new window (2.31 MB). Any queries contact the Herefordshire Council Research Team: 01432 383634 or researchteam@herefordshire.gov.uk

AGRICULTURAL CENSUS 2006

The Agricultural Census is carried out every June by DEFRA (Department for Environment, Food and Rural Affairs). This is a sample survey (of between 45,000 and 75,000 holdings) where farmers are required to state what agricultural activity is happening on the land as of June each year. This includes information relating to farm types, land use, crops, livestock and labour.

This article uses provisional estimates as of September 2007 for the **June 2006** census data, finalised data to be released by DEFRA in December. In order to ensure that individual farms are not identifiable DEFRA have suppressed certain figures.

Labour

Herefordshire's **total labour force has increased** by 18% since 2000 (from 9,300 in 2000 to 11,000 in 2006). Comparatively, total labour figures have only risen by 0.4% regionally and have decreased by 3.5% nationally.

The highest proportion of agricultural employees were **part-time farmers**, accounting for 30% of the agricultural workforce in Herefordshire and 35% in both the West Midlands region and England.

Casual Labour employees

Note: Casual labour employees include - family and non-family workers who are employed for less than 20 weeks of the year, youth trainees on official schemes and Seasonal Agricultural Workers Scheme (SAWS) workers.

32% of Herefordshire's agricultural labour force are employed as **casual workers** (3,477 people), compared to just 18% of the West Midlands agricultural workforce and 13% of England's. For Herefordshire, this is a 22% increase from last year and a 109% increase since 2000, far greater than the regional and national increases (29% and 2% respectively).



Herefordshire has seen a sharp rise in the number of casual labour employees since 2003, with much larger numbers employed in Herefordshire than in neighbouring authorities.

Land Use

In 2006 there were a total of **5,066 working farm holdings** in Herefordshire with a total farmed area of approximately 182,153 hectares (ha)¹.

The number of farm holdings in Herefordshire has increased steadily since 2000 (4% in total).

In 2006, there has been a 3% increase in holdings that are 'owned' and a 2% decrease in those that are 'rented' compared with 2005.

The majority of Herefordshire farms are quite small; **43% are less than 5 hectares** and a further 20% are between 5 and 20 ha (2,157 and 1,004 holdings respectively). Only 11% of Herefordshire farms are 100 hectares or greater in size (563 holdings). This pattern is similar in Herefordshire's neighbouring authorities, as well as regionally and nationally, all with higher proportions of smaller farms.

The majority of Herefordshire's agricultural holdings (**37%**) are **permanent grass**, which accounts for 43% (78,338 ha) of the total area.

Herefordshire's neighbouring authorities, Shropshire, Gloucestershire and Worcestershire, have similar **land use proportions** to that of Herefordshire. Although Shropshire has slightly more area used for permanent grassland (46%) compared to Herefordshire (43%), Herefordshire is on par with figures for the West Midlands. Worcestershire has more land used for crops and bare fallow (42%) than Herefordshire (38%).

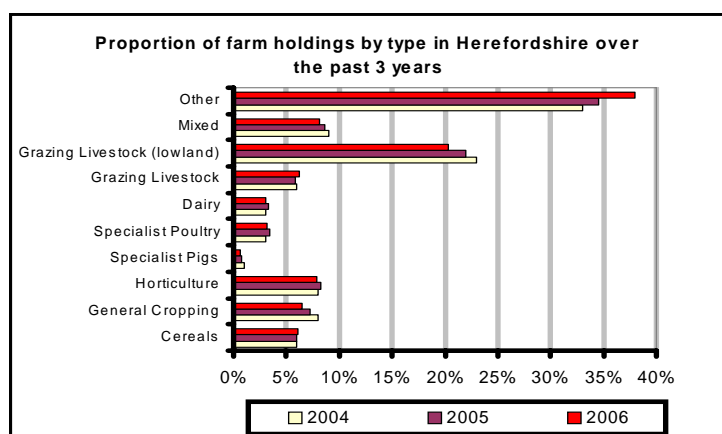
¹ 1 hectare = 2.5 acres

AGRICULTURAL CENSUS (CONT.)

Farm Type

The largest proportion of farms in Herefordshire are classed as 'other' i.e. those that do not fit with mainstream agriculture classifications (e.g. specialist goat) and this has seen a large increase over the last year.

The largest single category of farm type over the last few years has been **grazing livestock (lowland)**, although the proportion has decreased gradually from 24% in 2003 to 20% in 2006. Proportions of general cropping and mixed farm holdings have also seen a continual decrease over the last 3 years.



Differences between Herefordshire and other areas are:

- Herefordshire's **'other' farm holdings** have **increased** from 35% in 2005 to 38% in 2006, although is still lower than the regional and national figures.
- Herefordshire has a **higher amount of horticulture holdings** (8%) than other neighbouring authorities like Shropshire (3%), and regionally and nationally, both 5%.
- Herefordshire has **slightly higher proportions of general cropping holdings** (6%) than other areas, 4% regionally and nationally.
- Herefordshire has lower **proportions of dairy holdings** (3%), compared to 6% across England and 10% in Shropshire.
- Herefordshire has a slightly **higher proportion of mixed holdings** (8%) compared to other areas, which range between 5% and 7%.

Crop Areas

38% of Herefordshire's agricultural land area is used for **crops and bare fallow**. This is the second largest type of land use in Herefordshire, after permanent grassland.

54% of Herefordshire's agricultural cropping land is used for cereals. **Wheat** accounts for the **single largest proportion** (37%) of the total land used for cropping in 2006. This has been the case since 2000. The next largest proportions of land are used for **potatoes** and **oilseed rape** (accounting for 9% and 8% of the cropping land respectively).

There has been little change in the area of land used for **potatoes** in Herefordshire, a slight **increase** of 3% since 2001. 9% of Herefordshire's agricultural cropping land is used for potatoes, which is much higher than neighbouring authorities (between 0.3% to 1.5%), the West Midlands (1.7%) and England (1.1%).

There has been a 6% **decrease** in the area of land used for **horticulture** since 2001. The proportion of crop area in Herefordshire used for horticulture was approximately 8% in 2006. Comparatively 4% of land regionally and nationally was used for horticulture, and 8% in Worcestershire.

The area of land used for **small fruit** (fruit such as strawberries, blackberries and wine grapes) has **increased** by 61% since 2001. Herefordshire now has 2% of agricultural cropping land used for small fruits. The West Midlands has 0.5% of land used for small fruit and England has just 0.2%.

Livestock

Unfortunately, the majority of livestock data was suppressed in the most recent Census Survey, only publishing numbers of pigs, sheep and goats, most likely to preserve anonymity of particular farms where there are small numbers.

The **largest numbers of livestock holdings farm sheep**, with 1,946 holdings farming a total of 665,515 sheep.

'Click here for the full article' - please note this opens a new window (64.0 KB). Any queries contact the Herefordshire Council Research Team: 01432 383634 or researchteam@herefordshire.gov.uk

FARM BUSINESS STUDY 2005/06

The Farm Business Survey is undertaken each year by DEFRA (Department for Environment, Food and Rural Affairs) and collects full management accounting data on the agricultural activities of farm businesses and limited information about non-agricultural activity.

Latest results use **2005/06 accounting year** data and are published as 'Farm Accounts in England 2005/06'. There were 61,700 farms included in this study, covering farms that occupy a farmer for at least half of their time, although these account for slightly less than half the total number of farms, however they account for 90% of land area farmed and 96% of agricultural production.

The Farm Business Study use a number of ways to measure farm income:

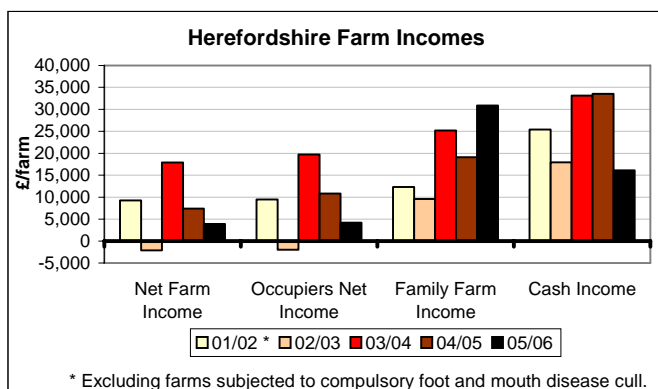
- **Net Farm Income**
- **Occupier's Net Farm Income**
- **Family Farm Incomes**
- **Cash Incomes**

For more information about what these measures are, please see the full article available on Herefordshire Partnership's website (details at the bottom of this page).

Herefordshire's average (mean) farm incomes have generally fluctuated over the last 5 years, but were generally lower in 2005/06 than the previous year, except for family farm income which has seen an increase.

Individual farm income types:

There has been a 47% decrease in Herefordshire's average **net farm income** from £7,402 per farm in 2004/05 to £3,921 in 2005/06. Compared to £13,649 in the West Midlands (30% decrease from 2004/05) and £21,137 for England.



Herefordshire experienced a 61% decrease in average **occupier's net farm income** over the last year, from £10,796 in 2004/05 to £4,174 in 2005/06.

Herefordshire's average **family farm income** experienced a 61% increase in the past year (from £19,127 in 2004/05 to £30,881 in 2005/06). Now comparing favourably with the picture regionally and nationally (£30,859 in England and £30,859 in the West Midlands).

Average **Cash incomes** tend to be higher than other income measures. Cash incomes in Herefordshire fell to £16,128 in 2005/06 compared to £37,235 in the West Midlands and £45,264 in England.

Average Net Farm Income by Farm Type for England

Specialist poultry farms experienced the largest **increase** in net farm income of approx. £44,300 since 2003/04, whilst **dairy** farms experienced an increase of approx. £3,500.

Largest **decreases** since 2003/04 were seen in **general cropping** farms (£30,100 less) and **grazing livestock (lowland)** farms (£22,300 less).

Non-Agricultural Income and Diversification

In 2005/06, **50%** of farms in England had some form of **diversified activity** (non-agricultural activity of an entrepreneurial nature which uses farm resources).

For the 23,000 farms which let out buildings, the income from this (£312m) is nearly 40% of their total farm income. For food processing and retailing this proportion is approx. half (£66m of £137m).

'Click here for the full article' - please note this opens a new window (45.2 KB). Any queries contact the Herefordshire Council Research Team: 01432 383634 or researchteam@herefordshire.gov.uk

HEREFORDSHIRE POPULATION ESTIMATES

The Office for National Statistics (ONS) publishes official estimates of population for local authority districts in England and Wales annually. A recent review of the international migration component of local population change has resulted in a new methodology for the **2006 mid-year estimates**, which were published in August 2007. At the same time, ONS revised the estimates for the years **mid-2002 to mid-2005**, using the new methodology.

This article considers the impact of the revisions on Herefordshire's population estimates before looking at the current population structure in the county, along with changes between 2001 and 2006. It also summarises the implications for other population datasets, and planned future publications.

The most important point to note is that the **changes to the methodology render all previous mid-year estimates obsolete**. The consequence of this is that **a consistent time series of Herefordshire's population now only exists from 2001 onwards**.

Effects of the Revisions

The population estimates are still based on the concept of 'usual residence', i.e. people are counted where they usually live. As the estimates are based on the Census this is self-defined to a certain extent, but rules are applied to particular groups of the population - e.g. students are counted at their term-time address, and a person is only counted as an international migrant if they change their country of residence for at least a year.

The mid-2006 estimate of Herefordshire's resident population is 177,800.

The revised Herefordshire estimate for mid-2005 is 177,300, which is 1,500 people (0.8%) lower than the original estimate of 178,800.

The revisions suggest that the rate of growth in the county has been lower than previously thought: an average annual growth since 2001 of 0.3% rather than 0.6%.

Current Profile of Herefordshire's Population

The county has an older age profile than England and Wales as a whole, with higher proportions of the population in all age groups from 45 upwards, and lower proportions in the younger age groups. The largest differences are in the 16-29 year-old age groups, although these can partly be explained by the point made above with regard to students being counted at their term-time address.

2006 mid-year estimates of population

Age group	Herefordshire		England & Wales
	Number	% of total	% of total
Under 16	32,000	18.0%	19.0%
16 to 29	24,000	13.4%	18.3%
30 to 44	34,800	19.6%	22.0%
45 to 64*/59**	44,600	25.1%	21.9%
65*/60** to 74	24,900	14.0%	11.0%
75 to 84	12,800	7.2%	5.7%
85 and over	4,800	2.7%	2.1%
Total	177,800	100.0%	100.0%

* males; ** females. **Source:** ONS © Crown copyright

Trends Since 2001

Herefordshire's population increased by 2,900 people (1.7%) between 2001 and 2006, slightly below the national increase (2.6%). The working age population increased by 1.2% (1,200 people) over the same period, although, again, this is lower than the increase nationally (3.7%).

The most dramatic percentage change was in the number of very elderly; an increase of 800 people aged 85+ represented a 20.0% increase, in comparison with just 10.2% nationally.

Implications for Other Population Data

ONS plan to publish estimates of the **mid-2006 population of Lower Super Output Areas (LSOAs)** at the beginning of October 2007. These will replace the Research Team's current mid-2004 estimates for wards and parishes.

The current **Herefordshire population forecasts** are based on the original 2005 mid-year estimates, and these can still be used for the time being. The Research Team will produce updated forecasts after ONS publish their 2006-based national population projections later in the autumn of 2007.

'Click here for the full article' - please note this opens a new window (58.4 KB). Any queries contact the Herefordshire Council Research Team: 01432 260498 or researchteam@herefordshire.gov.uk

SEASONAL & MIGRANT WORKERS

Information on migrant workers comes data sources such as National Insurance Number (NINo) registrations which is summarised in the following article. It should, however, be noted that they *provide inflow data only, as there is no requirement to de-register if a person leaves the UK*. Neither source includes people migrating for the purpose of studying and for various other reasons.

Seasonal workers in Herefordshire are defined for this article, as those working on farms over the growing season. Many are recruited through the SAWS scheme (students from outside the EEA), thus providing a useful source of data. Seasonal workers are also recruited in other ways. Some are included in WRS figures, but it is not possible to separate them out.

Introduction

In May 2004, ten new countries were admitted into the European Union (EU): Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia. The UK government has imposed legislation pertaining to a sub-set of these states (excluding Malta and Cyprus), known as the Accession 8 (A8), with the purpose of regulating access to labour markets and to provisionally restrict access to benefits, through the Worker Registration Scheme (WRS).

Two more countries, Romania and Bulgaria, joined in January 2007, with further restrictions placed on workers from these countries.

National Insurance number allocations

Annual registrations approximately doubled (104% increase) for the UK as a whole over the past five years, but in Herefordshire, they increased eight-fold from 270 registrations in 2002-03 to 2,120 in 2006-07 (685% increase). Regionally, registrations have increased at a similar rate as nationally (105% increase).

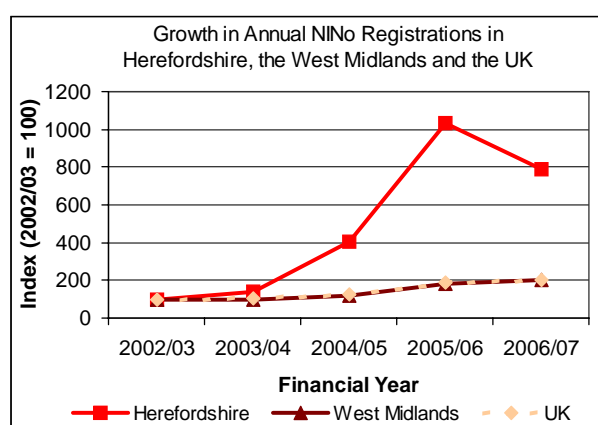
Herefordshire's escalation in annual registrations between 2003 and 2006 was followed by a downtrend in 2006-07 of 24% from the previous year.

During the last financial year (2006-07) the majority (85%) of workers that registered in Herefordshire were from A8 states, of which the largest proportion (58%) came from Poland, followed by Slovakia and Lithuania, each accounting for 9% of registrations.

Corresponding proportions of A8 nationals registering in the West Midlands and the United Kingdom as a whole are 52% and 45%, respectively, of which the majority were from Poland.

Comparing the change regionally and nationally in the number of NINo registrations, in the two years immediately following accession (May 2004) with the two years preceding accession, yields an approximate 1.5-fold increase (50%). By comparison, Herefordshire has seen a 6-fold increase in NINo registrations post accession (508%).

Of all authorities within the UK, Herefordshire experienced the 2nd largest increase in NINo registrations from non-UK countries during the 2 years immediately after accession. This represented an increase of 3,250 (from 640 to 3,890) registrations between 2002-04 and 2004-06.



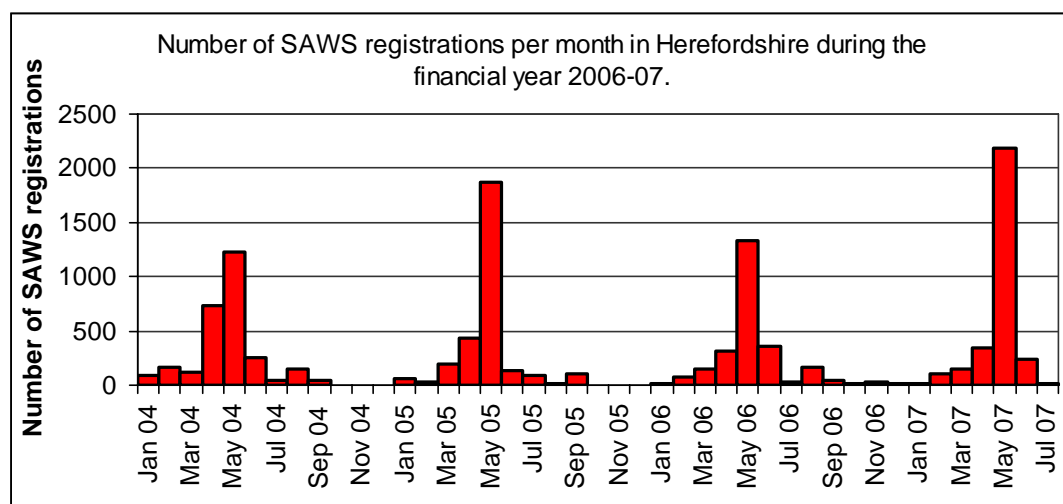
SEASONAL & MIGRANT WORKERS (CONT)

Seasonal Agricultural Worker Scheme (SAWS)

SAWS covers students (aged 18 and over in full-time education) from outside the European Economic Area who *can work here for between 5 weeks and 6 months at a time* for farmers.

The number of workers in Herefordshire registered on SAWS during the last financial year (2006-07) was 2,564. This corresponds to a 10% decrease on the previous year's figure of 2,864. Allocations were dominated by Ukrainians (45%), Russians (21%) and Bulgarians (15%).

Herefordshire exhibits a clear picture of seasonality in the SAWS. However, the annual peaks in the number of registrations for the two data sets do not coincide, with the SAWS peaks occurring one quarter earlier. Possibly due to a time lag in the recording of SAWS registrations.



Please note, this article was amended on 28th November.

This article provides current and trend information for Herefordshire based on national administrative data sets. It will form part of a more comprehensive report, to be produced in the Autumn, which will include findings from ongoing local and regional research.

READERS SURVEY RESULTS (2007)

The Research Team would like to thank all readers who returned their readers survey!

In order to seek readers' views on the new Quarterly Economic Bulletin (QEB), a survey was sent out in May 2007, to approximately 400 readers that include Herefordshire Council employees, Councillors, Parish Councils, local businesses, community/voluntary organisations, schools, colleges and libraries. **34 surveys were completed** and the results are outlined below.

Respondents included 12 Councillors, 6 Local Businesses and 5 Voluntary and Community Organisations. Others that responded were Job Centre Plus, Chamber of Commerce, Herefordshire Trade Federation and University of Worcester.

The aim of the QER is to provide up to date socio-economic data from a range of sources to a variety of readers and the Bulletin version was developed to summarise the key messages from each article.

Firstly, respondents were asked **what they thought of the new Bulletin version** of the Quarterly Economic Report.

All respondents either 'liked a lot' (68%) or 'liked' (32%) the **short summary articles** in the new Bulletin version of the Quarterly Economic Report, with no responses of 'dislike' or 'dislike a lot'.

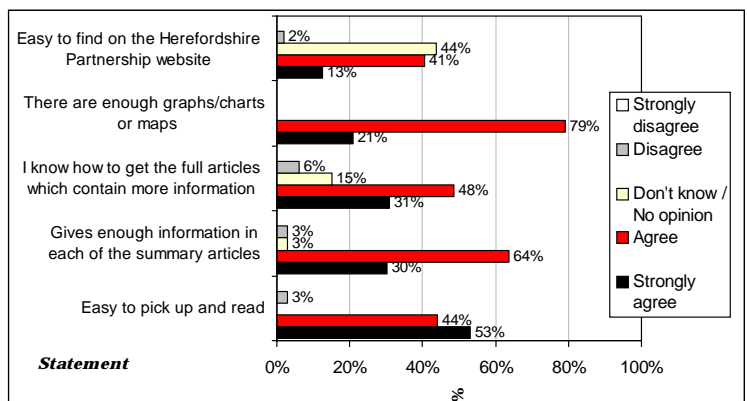
79% of respondents either 'liked' (50%) or 'liked a lot' (29%) the **full articles available on the website**. There were no responses of 'dislike' or 'dislike a lot' received. However, 21% 'didn't know' or had 'no opinion', which may be because they have not accessed the full articles on the Herefordshire Partnership website.

85% of respondents either 'liked' (50%) or 'liked a lot' (35%) the **use of colour in the bulletin**. 15% 'didn't know' or had 'no opinion', again with no responses of 'dislike' or 'dislike a lot' received.

Further comments about the **format of the Bulletin**:

- Improve the appearance of the Bulletin, including the use of colour
- Subheadings on the front page to identify individual items outlined in the Bulletin
- Request for short, sharp factual information
- Difficulty in following the articles on some pages
- 'Front cover needs to be more dynamic'
- 'Very easy to read the new format – I really liked it!'

'How much do you agree or disagree with the following statements?'



Easy to pick up and read - Almost all of the respondents 'Strongly agreed' (53%) or 'agreed' (44%), with only 3% disagreeing.

Gives enough information in each of the summary articles – 64% of respondents 'agreed' and 30% 'strongly agreed'. 3% 'disagreed' with the statement and a further 3% 'didn't know' or had 'no opinion'

I know how to get the full articles, which contain more information – 31% of respondents 'strongly agreed' and 45% 'agreed' with this statement. 6% 'disagreed' and 15% 'Didn't know / No opinion'.

There are enough graphs/charts or maps – All respondents either 'agreed' (79%) or 'strongly agreed' (21%).

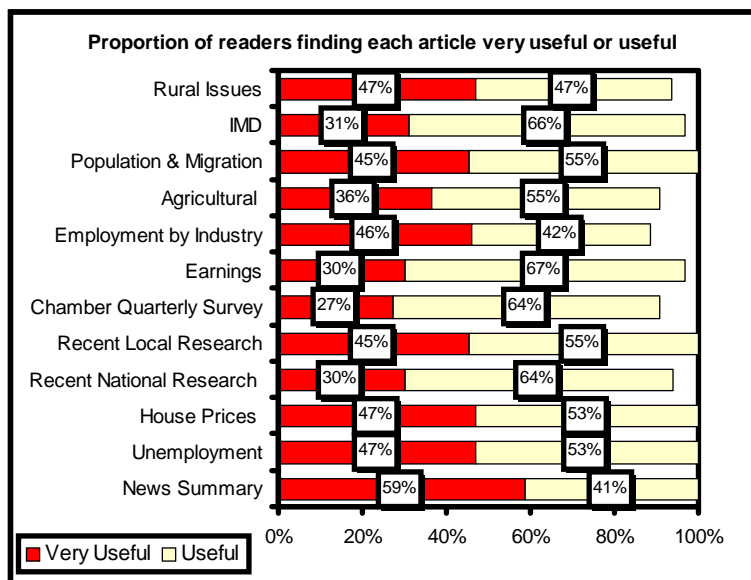
Easy to find on the Herefordshire Partnership website – 41% 'agreed' and 13% 'strongly agreed', with only 2% disagreeing. However, 44% of respondents 'Didn't know' or had 'No opinion', suggesting that they hadn't visited the Herefordshire Partnership website.

Comparing the Bulletin format with the previous report format of the QER

74% of respondents preferred the **current bulletin** format with 23% having no preference and just 1 respondent said that they preferred the previous report format.

READERS SURVEY RESULTS (CONT.)

How useful do you find the following sections of the report?



Overall the sections that appear to be most useful are: the News Summary, Unemployment, House Prices, Recent Local Research and Population & Migration.

Requests for articles on specific topics:

Tourism investment versus Income Positive/negative impacts on tourism

Employment in 'tourism' has always been hard to measure as it is not an industry in its own right. There are studies into tourism and we will try to include this type of information where available in the future.

Availability of Training

The Chamber of Commerce Quarterly Economic Survey asks members about their investment plans for training. This information was included in May 2007 in the annual article about results of this survey.

More retail figures

The Office for National Statistics publishes retail statistics but only at a national level. Some research may be undertaken locally to get retail figures; if so, it could be included in this report in the future.

More information on the voluntary sector

There has been a recent study (March 2007) "Valuing the Voluntary and Community Sector in Herefordshire and Worcestershire" on behalf of the Infrastructure Consortia in Herefordshire and Worcestershire. This report is available from them: info@hinc.org.uk or 01432 267820

Numbers of new businesses by population

An article in November 2006 QER looked at business formation and survival rates, and business stock. Number of businesses by population could be used to compare Herefordshire with elsewhere.

Gross Domestic Productivity (GDP) figures

Generally GVA (Gross Value Added) is now the preferred measure. The term GVA is used to denote estimates that were previously known as gross domestic product (GDP) at basic prices. We plan to include an article on this in the future.

Herefordshire Council's support or otherwise of Government policy

The QER is a Herefordshire Partnership document, so is not the suitable place to report on any one Partners' policies. We will try to include information about policy issues affecting the county e.g. the Regional Economic Strategy.

Statistics on the number of people, of working age, claiming incapacity benefit

An article covering a number of the Department for Works and Pensions benefits statistics, including incapacity benefits, is planned in the near future.

Environmental

Information around carbon emissions has been included in the State of Herefordshire Report 2007 and can be accessed via Herefordshire Partnership www.herefordshirepartnership.com

Leisure and Culture statistics

Within the State of Herefordshire we report on usage and satisfaction with leisure and cultural facilities in Herefordshire. Local research that looked at the economic impact of these within Herefordshire would be signposted to in the QER.

Reports on work of 'Business Link'

The QER is intended to share economic data; so reporting on the work of one organisation is not appropriate. For more information about Business Link visit www.businesslink.gov.uk

Information on single parents

Where economic data is split for groups of people such as 'lone parents', we will try to include this within specific articles in the future.

Any queries contact the Herefordshire Council Research Team: 01432 260464 or researchteam@herefordshire.gov.uk

RECENTLY PUBLISHED RESEARCH

National Research

Evidence Base Review on Mobility - Choices and Barriers for Different Social Groups

Department for Transport (June 2007)

This report is a large scale systematic review on the travel needs, choices of, and barriers for, different social groups in the UK.

The review calls for a two-part summary. This first part offers a 'narrative account' of people's changing transport needs and experiences across the life-course and in relation to key social characteristics. The review highlights that people's relationship with transport is dynamic, and as people make transitions through childhood, youth and old age their changing lifestyles trigger new travel needs and experiences of transport.

Cross-cutting this, the review also demonstrates a rich diversity in travel needs and experiences among people at similar life stages, but differentiated on the basis of income, locality, ethnicity, gender and disability.

The full report, can be found at: http://www.dft.gov.uk/pgr/scienceresearch/social/evidence_base_review_on_mobility?page=1#a1004

Health and safety in the small to medium-sized enterprise

Health & Safety Executive (HSE) (August 2007)

The project aimed to identify psychosocial factors which are effective in the maintenance and improvement of health and safety by the SME. The report outlines the work undertaken to achieve this aim.

This project sought to identify what SMEs do about health and safety, what prevents them from doing health and safety, and what would encourage them to undertake more health and safety. The project aimed to elicit views from stakeholders, identify the positive steps presumed to be undertaken, quantify the basis for presumed effectiveness of measures, and to provide recommendations regarding dissemination of these effective actions in support of good safety and health practice.

For more information go to the HSE:

<http://www.hse.gov.uk/research/rrhtm/rr578.htm>

Local Research

Housing Needs Studies continue across the county. After a survey and analysis is completed, a report is issued to the parish or town council and circulated to other interested parties both within and outside Herefordshire Council. The report for the Group Parish of **Humber, Ford and Stoke Prior (which includes Risbury)** was published at the end of June, and found 16 households with a potential affordable need. Lyonshall and Leintwardine have been surveyed since then, with reports due shortly, and surveys of Madley and Wellington are under way.

All housing needs survey reports can be accessed from www.herefordshire.gov.uk/research or can be obtained by telephoning the Research Team on 01432 383069.

Forthcoming Articles:

- GVA figures
- Earnings and hours worked
- DWP benefits data

For more information or any queries please contact:

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