



WidnesWaterfront

Location Review



east west locations

Introduction

The following report provides a thorough assessment of the demographic profile, local labour market and extent of recruitment potential applicable to Widnes Waterfront.



The Widnes Waterfront project will bring forward new, high specification office accommodation suitable for a variety of employers in the financial and business services, Information Communication Technology (ICT) and creative sectors.

The catchment serving this area has been modelled based on the current commute to work patterns of those working in and around Widnes at administrative level salaries of between £12,000 and £16,000 per year. All data within the report relate to this area unless otherwise stated.

The Journey To Work Area (JTWA) is based on a commute time of 40 minutes at peak travel periods. The original JTWA in the previous Runcorn Review for Halton BC in conjunction with The Mersey Partnership concentrated on a more condensed 30 minute commute time, therefore the catchment in this Review for Widnes Waterfront is larger.

The report is further supported by:

- A detailed Location Matrix containing a comprehensive set of demographic, workforce, training and skills data for the area, presented as Annex A.

Summary



Key Observations

The Widnes Waterfront area sits at the centre of a very significant catchment area in terms of potential recruitment, numbering in excess of 826,600 residents and a resulting labour pool of close to 386,000 people.

The catchment area offers an employed workforce of over 374,700 people, 11,660 people actively looking for work and some 21,000 people that would work given the right employment conditions to fit their personal circumstances. A total effective labour pool for recruitment purposes of 407,420 people.

Following the population profile the catchment workforce is generally young and also offers a higher than average proportion of those with experience in both private and public sector service industries.

Over 100,000 people living in the catchment hold an NVQ at level 4 or higher, broadly equivalent to a degree, and the pool of people not in work but holding high level NVQ qualifications at levels 3 and 4 is large.

Professional and semi-professional occupations are held by 88,000 people in the area and the cost of these positions is competitive against national and regional averages. IT support, contact centre staff and other secretarial jobs are also highly cost competitive in the area. Many staff travel to other parts of the region daily for work offering an opportunity for employers located in the area to recruit from the local resident population in large volume and at competitive cost.



The Location

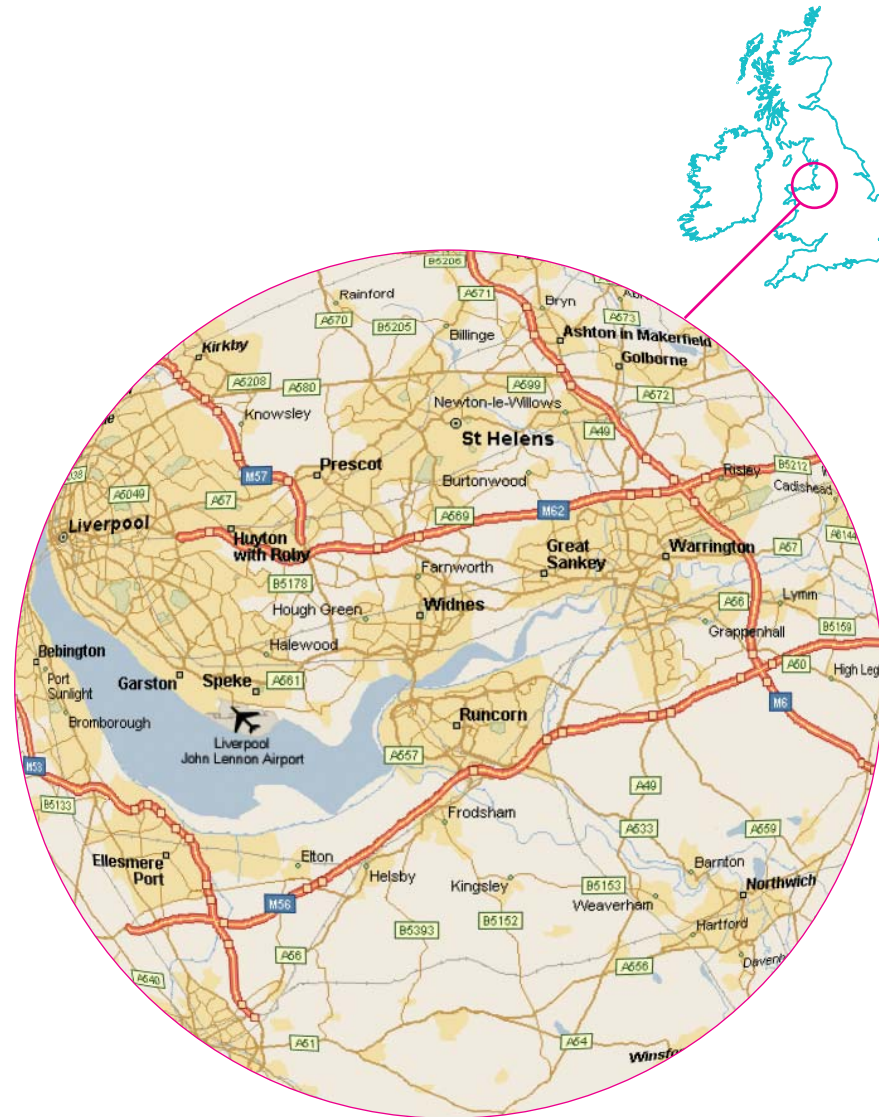
Broad Sub-Regional Location

- North West
- Merseyside
- M62, M56/M6

Average Travel Times

	Road	Rail (Warrington)
Birmingham	1 hr 45	1 hr 15
Edinburgh	4 hrs 35	4 hrs 15
Glasgow	3 hrs 55	3 hrs
Leeds	1 hr 15	1 hr 30
Liverpool	25 mins	30 mins
Central London	3 hrs 45	2 hrs
Manchester	45 mins	30 mins
Newcastle	3 hrs 25	3 hrs 10
Warrington	20 mins	-
Liverpool Airport	20 mins	-
Manchester Airport	45 mins	50 mins

A regular train service runs between Widnes and the West Coast mainline railway station at Warrington. Three trains an hour run during the day with a journey time of approximately 10 minutes.





The Journey To Work Catchment

40 minute Journey To Work Area (JTWA), Peak Hours



Demographic Profile

Key Data

Overall Demographics

Catchment Population (mid-2004)	826,640
male	400,560
female	426,080

Working Age Population (16 – 64)	528,010
male	258,670
female	269,340

Population Change, 1991 - 2004 (North West +1.5%, England +6.5%)	+1.2%
---	--------------

Working Age Change, 1991 - 2004 (North West +2.8%, England +1.5%)	+0.7%
--	--------------

Forecast Population (16 - 64)

Net change (to 2014)	11,900
Growth, % of current population	+2.2%

Summary

- Close to 827,000 people reside within a 40 minute travel to work area of Widnes Waterfront. This catchment out-performs many edge of city areas including Birmingham Business Park (819,870 people) and Carlton Park, Leicester (749,300 people).
- Over 528,000 residents (63.9%) are of working age, between 16 and 64 years old, with females forming a slight majority (51%).
- The catchment has experienced a growth in its population since 1991. This growth reflects a significant decline in outwards migration from the area in recent years.
- Between those in their last ten years of working age and those aged 5 to 14 years old who will reach working age by 2014, there will be a growth of close to 12,000 people in the working age group..
- ..increasing the current working age population by 2.2%. This expected change is higher than the North West as a whole (1.7%) and significantly above the forecast national change (-0.2%) over the same period.



Demographic Profile (2)

Key Data

■ 16 to 19 Year Olds

Total Residents, 16 to 19	43,810
males	22,280
females	21,540

■ 20 to 29 Year Olds

Total Residents, 20 to 29	88,970
males	43,750
females	45,220

■ 30 to 39 Year Olds

Total Residents, 30 to 39	123,430
males	59,360
females	64,070

20 to 39 yrs, % of working age **40.2%**

■ Those Approaching Retirement

55-64 Year Olds	96,510
-----------------	--------

Summary

- The population is predominantly female from 25 years old upwards, with the largest difference occurring among those aged between 30 and 34 years. In this group women account for 52.1% of total.
- Over a quarter of the working age population are under 30 years (25.2%)..
- ..with a further 23.4% in the 30 to 39 year old age group, slightly above regional (22.6%) and matching the national age profile.
- In total, over two fifths of the working age group (40.2%) are between 20 and 39 years.
- Those in their final ten years of working age account for 18.3% of the working age population, above the 16.6% found within the region and 16% in England.
- However, an above average proportion of 5 to 14 year olds (13.1%) against 12.8% regionally and 12.5% nationally, will replace these over the next decade. This will provide a local working age group that is both larger and younger as a result.

Workforce Profile

Key Data

■ Employment Data (2004)

Overall employees	374,760
males	208,480
females	166,280
Employees of working age	362,560
males	204,450
females	158,210
Young Employed, 16 to 24 yr olds	60,150
males	31,690
females	28,460
Employed aged 25 to 34 years old	89,560
males	47,420
females	42,140
'New Grey' Employees	12,100
% of Employees	3.2%
(North West 3.0%, England 3.2%)	

Summary

- Close to 375,000 residents were employed within the catchment at 2004 with.
- ..over 362,000 being of working age. Females account for 43.6% of working age employees.
- The catchment has a generally young employee profile. The young employed, those aged between 16 and 24 years, made up 16.1% of total employees against 15.2% regionally and 14.1% nationally.
- Females within this age group accounted for 47.3% compared to 47% regionally and the lower 43.6% overall female participation rate among those in work in the catchment.
- Employees aged 25 to 34 made up 23.9%, again above regional and national averages of 21.8% and 23.1% respectively.
- In total, the 20 to 34 year old group accounted for over a third (33.7%) of all working residents in the area against 31.2% in the North West and 31.9% nationally.
- At 3.2% the proportion of employees continuing to work after the official age of retirement is higher than in the region and match the current national rate.

Workforce Profile (2)

Key Data

■ Employment by Sector

Manufacturing Sector Employees	65,530
Service Sector Employees	168,920
males	91,400
females	77,520
Banking, Finance and Insurance	43,020
banking and insurance related	4,000
other financial services	3,300
Public Sector Administration	106,100

Summary

- There is a high incidence of employment in manufacturing in the catchment, 17.5% of employed residents against 15.2% in the region and 15.3% nationally.
- However, the largest employment sector within the catchment remains the private service sector. This accounts for 45.1% of employed residents, of which..
- ..45.9% are female. This participation rate stands above the overall rate of women in employment in the area (44.4% in total and 43.6% among the working age group).
- A further 28.3% of residents are employed by the public service sector, closely matching the regional position (28.4%) but significantly above national (25.5%) average.
- Over one in ten residents (11.5%) are employed within either financial or property based service industries broadly defined. Banking and other financial services forms the largest individual group of employment among these with 7,300 people currently working in this activity. Many travel outside of the catchment area for work.

Workforce Profile (3)

Key Data

■ Employment by Occupation

Professional Staff	43,380
Part-Qualified Professionals	44,540
Sales/Customer Service jobs	38,070
Admin/Secretarial jobs	52,630
Skilled Trades	43,100
Public/Emergency Services	28,540

■ Part time employees

Total Employed Part Time	21.1%
(North West 25.4%, England 25.4%)	

Summary

- Professional level staff account for 11.6% of employed residents, over a half percentage point above the 10.9% in the region.
- A further 11.9% of employees occupy associate or part qualified professional positions.
- Many residents work in either sales or customer service positions, accounting for over one in ten jobs. The incidence of these occupations is significantly higher than regional (8.7%) or national averages (7.8%).
- Administrative and secretarial occupations account for 14% of employed residents, again, above the 13.4% found regionally and 13.1% nationally.
- Skilled trades positions make up 11.5% of the employed workforce and those within public and emergency services account for 7.6%.
- At 21.1% (83,480 people), those employed in part time posts under-perform national and regional average levels of part time working (both 25.4%). Close to one fifth (19.4%) of these individuals are young, aged between 16 and 24 years old.

Jobseekers and Other Labour Pools

Key Data

■ Unemployment Data

Unemployed (average 2005)	11,660
males	9,080
females	2,580

Unemployment Rate	2.2%
(North West 2.3%, England 2.2%)	

Unemployed 20 to 29	4,030
males	3,195
females	835

Unemployed 30 to 39	2,475
males	2,125
females	350

■ The Hidden Labour Market

Working Age Of Labour Market	123,460
females	67,260
16 to 24 year olds	26,250
25 to 34 year olds	21,180
% Who State They Want Work	21,000

Summary

- An average of 11,600 people per month were registered seeking employment during 2005.
- Males dominated these jobseekers, accounting for 77.9% of total.
- The unemployment rate of 2.2% for the catchment broadly matches both the regional and national rate. There is a significant degree of variation in the area with parts of the catchment reporting a rate as high as 6.0%.
- The majority of jobseekers were 20 to 29 year olds. This group makes up over a third of the total (34.6%). Males within this age group account for 27.4% of jobseekers of all ages.
- In addition, over 123,000 residents are economically inactive, accounting for 23.4% of the working age population.
- Females account for 54.5% of this group. Over one fifth (21.3%) are aged between 16 and 24 with a further 17.2% aged 25 to 34.
- A very large group of close to 21,000 people (16.9%) of these economically inactive individuals stated they would return to work given the right employment opportunities.



Workforce Training & Skills

Key Data

■ Workforce and Resident Training

% of population in training	10.6%
males in training	25,820
females in training	29,980

Employees in training	12.7%
-----------------------	-------

Population with NVQ Level 3+	198,420
Employees with NVQ Level 3+	168,120
Population with NVQ Level 4+	102,970
Employees with NVQ Level 4+	90,420

■ Training Excellence

Nationally recognised Centre's of Vocational Excellence (CoVE's) in training exist at Further Education colleges in the catchment in the following areas:

- Business and IT
- Construction and Building Services
- Chemicals and Pharmaceuticals
- Media / Events and Major Event Production
- Healthcare and Public Services
- Media and Journalism

Summary

- Close to 56,000 residents of working age, one in ten, are currently participating in work related training within the catchment. 53.7% of the total are female.
- The training participation rate among those in work is 12.7% across the whole economy and 12.8% in the service sector.
- The local workforce is well qualified. Almost 200,000 residents possess an NVQ level 3 or higher qualification. Over half of these also hold an NVQ at level 4 or above, broadly equivalent to a degree.
- The pool of people with qualifications but not yet in work is relatively large. 30,300 people with NVQs at level 3 or higher are currently not working. 12,550 of these possess a higher level 4 qualification..
- ..indicating an immediately available group of qualified and skilled people for recruitment purposes.

Education Factors

Key Data

■ Educational Achievement

% of 16 – 19yr olds in education	54.2%
Proportion of pupils gaining..	
5 or more GCSEs (A* - C grades)	89.2%
(North West 88.0%, England 90.2%)	
5 or more GCSEs (A* - G grades)	53.5%
(North West %, England 57.1%)	
Average GCSE points score	335.5
(North West 321.8, England 355.2)	
Average A Level score	197.4
(North West 225.9, England 277.8)	

■ University Labour Pools (2004)

University Undergraduates	51,850
overseas, % of total	7.2%
University Postgraduates	11,325
overseas, % of total	24.4%
Modern Languages %*	6.8%
IT (Computer Sciences) %*	5.9%
Business Studies %*	10.4%
Law %*	4.1%

*First degree students only, ignores those studying languages or IT as a secondary subject.

Summary

- School leaving results compare well against city region and regional average levels in the catchment.
- GCSE results stand at or above regional average, with the overall GCSE points score per pupil at 335.5 against 321.8 regionally.
- A number of notable schools results significantly out-perform national average with four schools reporting average points scores above 400 at GCSE stage.
- Four university institutions serve the catchment, three within Liverpool and one in Chester, providing a total pool of almost 63,200 students. 17.9% of these are currently studying at postgraduate level.
- Particular strengths in subjects of study are displayed in modern languages, accounting for 6.8% of first degree students, and a high rate of participation in business studies courses.

Labour Market Costs

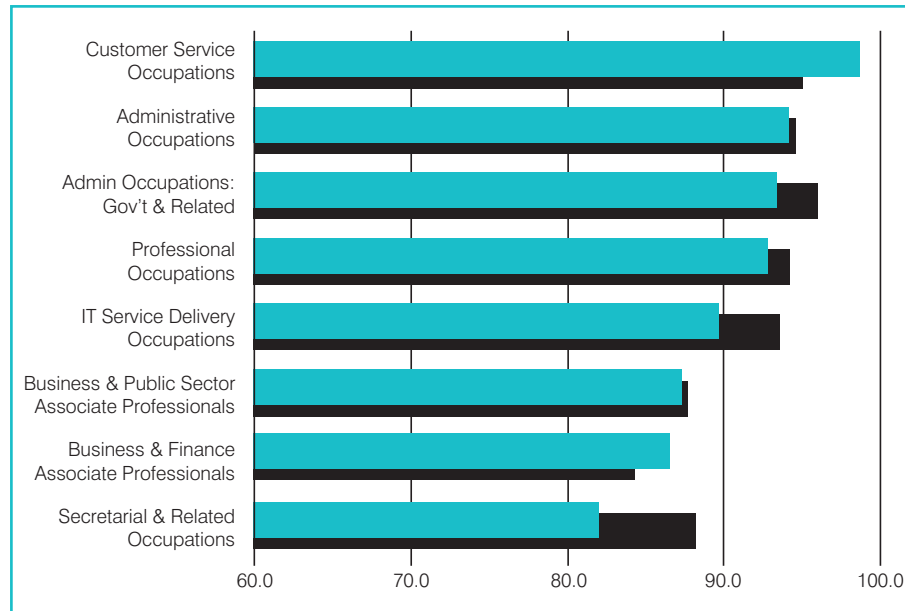


Key Data

■ JTWA Cost Index (England=100)

All Sectors Professionals	92.8
All Semi-Qualified Professionals	87.4
Business and Finance Semi-Qualified	86.5
Public Sector Administration Posts	93.5
Business and Finance Semi-Qualified	86.5
IT Support Staff	89.8
Customer Service Positions	98.6

The black series below shows average regional costs



Summary

- Data to left and within the cost chart display the competitiveness of the Widnes Waterfront area as a location for a wide range of office and related occupation types.
- In general, professional and semi-professional positions appear more competitive than general administrative jobs. In the case of fully qualified professional and government and related jobs the area's competitiveness out-performs even regional average.
- Customer service positions are competitive against national rates too, with a large number of contact centre type operations throughout the catchment. Residents local to Widnes Waterfront currently travel to these and other operations in the region daily.
- In addition, IT support staff show around a 10% reduction on national and a 5% reduction on regional costs.



Appendix A

EWL Data Outputs

Widnes waterfront JTWA location matrix, prepared march 2006

D	Demographics	Widnes Waterfront JTWA	North West	England
D1	Total Population, mid-2004	826,640	6,827,200	50,093,800
D1b	male	400,560	3,325,000	24,554,100
D1c	female	426,080	3,502,200	25,540,100
D2	Population, 5 - 14	108,390	874,500	6,247,400
D2b	male	55,620	448,700	3,202,900
D2c	female	52,760	425,700	3,044,600
D3	Population, 16 - 19	43,810	367,837	2,611,500
D3b	male	22,280	187,023	1,345,100
D3c	female	21,540	181,095	1,266,200
D4	Population, 20 - 29	88,970	824,200	6,276,000
D4b	male	43,750	408,600	3,156,300
D4c	female	45,220	415,600	3,119,600
D4d	% females	50.8%	50.4%	49.7%
D5	Population, 30-39	123,430	988,000	7,579,900
D5b	male	59,360	484,900	3,775,200
D5c	female	64,070	503,100	3,804,500
D5d	% females	51.9%	50.0%	50.2%
D6	Population, 40 - 49	118,160	961,600	7,045,900
D6b	male	58,000	474,300	3,496,000
D6c	female	60,160	487,300	3,550,000
D7	Population, 50+	284,930	2,328,700	16,825,700
D7b	male	131,530	1,074,000	7,781,300
D7c	female	153,410	1,254,500	9,045,000
D8	Population of working age (m/f to 64 yrs)	528,010	4,371,000	32,336,800
D8b	male	258,670	2,163,400	16,122,400
D8c	female	269,340	2,207,600	16,214,400
D8d	% of total population	63.9%	64.0%	64.6%
D9	Population 20 - 39, as % of working age population	40.2%	41.5%	42.8%
D10	Rate of change in population, 1991 - 2004	1.2%	1.5%	6.5%
D11	Rate of change in working age population, 1991 - 2004	0.7%	2.8%	1.5%
D12	% change in working age population, to 2014	2.2%	1.7%	-0.2%
D13	Absolute change in working age population, to 2014	11,900	72,400	-73,400

Widnes waterfront JTWA location matrix, prepared march 2006

LS	Labour Supply Data	Widnes Waterfront JTWA	North West	England
LS1	Official Labour Pool (LS2 + U2)	386,420	3,203,995	24,803,280
LS2	Total Employed (mid-2004)	374,760	3,102,000	24,119,000
LS2b	male	208,480	1,648,000	13,312,000
LS2c	female	166,280	1,454,000	10,807,000
LS3	Total Employed (under 20)	23,390	179,000	1,293,000
LS3b	male	12,470	99,290	645,210
LS3c	female	10,920	79,710	647,790
LS4	Total Employed 20 - 24	36,760	292,000	2,105,000
LS4b	male	19,220	150,500	1,105,125
LS4c	female	17,540	141,500	999,875
LS5	Total Employed 25 - 34	89,560	677,000	5,580,000
LS5b	male	47,420	373,030	3,013,200
LS5c	female	42,140	303,970	2,566,800
LS5d	20 - 34 year old employees, % of total	33.7%	31.2%	31.9%
LS6	Total 'New Grey' Employees, i.e. of retirement age	12,100	93,000	776,000
LS6b	Proportion of employed workforce of retirement age	3.2%	3.0%	3.2%
LS7	Manufacturing Employment	65,530	472,000	3,702,000
LS7b	Manufacturing Employees, as % of total	17.5%	15.2%	15.3%
LS8	Public Sector Employees	106,099	882,000	6,145,000
LS8b	Public Sector Employees, % of total	28.3%	28.4%	25.5%
LS9	Service Sector Employment, excl. public sector	168,920	1,461,000	12,015,000
LS9b	(Non-Public) Service Sector Employees, % of total	45.1%	47.1%	49.8%
LS10	Banking & Financial Services Employment	43,020	426,000	3,996,000
LS10b	Banking & Financial Services Employment, % of total	11.5%	13.7%	16.6%
LS11	Employees in Professional Occupations, % of total	43,383	337,000	2,911,000
LS11b	Employees in Professional Occupations, % of total	11.6%	10.9%	12.1%
LS12	Employees in Associate Professional Occupations	44,535	408,000	3,314,000
LS12b	Employees in Associate Professional Occupations, % of total	11.9%	13.2%	13.7%
LS13	Employees in Sales and Customer Service Occupations	38,070	271,000	1,890,000
LS13b	Sales & Customer Service Occupations, % of total	10.2%	8.7%	7.8%
LS14	Employees in Clerical & Admin Occupations	52,630	417,000	3,154,000
LS14b	Employees in Clerical & Admin Occupations, % of total	14.0%	13.4%	13.1%
LS15	% of workforce in part-time employment	21.1%	25.4%	25.4%

Widnes waterfront JTWA location matrix, prepared march 2006

U	Unemployment Data	Widnes Waterfront JTWA	North West	England
U1	Rate of Unemployment (Year to December 2005)	2.2%	2.3%	2.2%
U2	Catchment Area - Total Unemployed	11,660	101,995	709,890
U2b	male	9,080	77,230	522,580
U2c	female	2,580	24,765	187,310
U3	Total Unemployed 16 - 19	1,420	13,540	83,310
U3b	male 16 - 19	905	8,470	51,005
U3c	female 16 - 19	515	5,070	32,305
U4	Total Unemployed 20 - 29	4,030	34,580	223,100
U4b	male 20 - 29	3,195	26,715	166,585
U4c	female 20 - 29	835	7,865	56,515
U5	Unemployed aged 16 - 29, % of total	46.7%	47.2%	43.2%
U6	Total Unemployed 30 - 39	2,475	21,970	158,335
U6b	male 30 - 39	2,125	18,145	126,730
U6c	female 30 - 39	350	3,825	31,605
U7	Economically inactive population	123,460	934,000	6,588,000
U7b	Economically inactive, as % of official labour pool (LS1)	31.9%	29.2%	26.6%
U8	Economically inactive females	67,260	538,000	4,017,000
U9	Economically inactive 16 - 24 year olds	26,250	240,000	1,690,000
U10	Economically inactive 25 - 34 year olds	21,180	140,000	1,127,000

Widnes waterfront JTWA location matrix, prepared march 2006

Ed	Education/Training Data	Widnes Waterfront JTWA	North West	England
Ed1	Working age population in work - related training (mid-2004)	55,790	527,000	4,334,000
Ed1b	Ed1, % of working age population	10.6%	12.1%	13.4%
Ed2	Employees in work-related training	47,510	418,000	3,405,000
Ed2b	Ed2, % of employees	12.7%	13.5%	14.1%
Ed3	Service sector employees in work - related training	35,160	347,000	2,851,000
Ed3b	Ed3, % of service sector employees	12.8%	14.8%	15.7%
Ed4	Residents with NVQ Level 3 or higher	198,420	1,765,000	13,652,000
Ed4b	Ed6, % of working age	37.6%	40.4%	42.2%
Ed5	Number currently employed with NVQ Level 3+	168,120	1,464,000	11,284,000
Ed6	Out of work with skills at NVQ3+, % of total	15.3%	17.1%	17.3%
Ed7	Total residents with NVQ Level 4 or higher	102,970	956,000	7,660,000
Ed7b	Ed7, % of working age	19.5%	21.9%	23.7%
Ed8	Number currently employed with NVQ Level 4+	90,420	828,000	6,607,000
Ed9	Out of work with skills at NVQ4+, % of total	12.2%	13.4%	13.7%
Ed10	Total Enrolled HE Students (first degree) - 2003/04	38,780	130,250	992,320
Ed11	Total Enrolled HE Students (postgraduate degree)	11,325	49,535	439,985
Ed12	Annual Number of HE Graduates (first degree)	9,305	32,155	241,030
Ed13	Annual Number of HE Graduates (postgraduate degree)	2,290	9,735	95,910

Widnes waterfront JTWA location matrix, prepared march 2006



C	Salary Competitiveness Data	Widnes Waterfront JTWA	North West	England
C1	Professionals (All), gross wage rates, gross wage rates % of national	92.8	94.3	100.0
C2	Government Related Administrative Staff, % of national average	93.5	96.0	100.0
C3	Sales/Customer Service staff, gross wage rates, % of national average	98.6	95.1	100.0
C4	Semi-Qualified Professionals (All), gross wage rates, % of national	87.4	87.7	100.0
C5	Semi-Qualified Professionals (Business/Finance), % of national average	86.5	84.3	100.0
C6	General Clerical/Admin staff, gross wage rates, % of national average	94.2	94.5	100.0
C7	General Secretarial staff, gross wage rates, % of national average	82.0	88.2	100.0
C8	IT Support Staff, gross wage rates, % of national average	89.8	93.7	100.0

Sources:

East West Locations Ltd, 'JTWA Model', 2000 - 2006; Office for National Statistics/Census 2001, Crown copyright;

ONS, mid-year Population Estimates, 2004, NOMIS Crown copyright;

Labour Force Survey 2004 / Annual Population Survey 2005; Annual Business Inquiry 2004, NOMIS Crown copyright;

Official Claimant Count Series, Jobcentre +/NOMIS, 2005; Crown copyright.

Higher Education Statistics Agency, Students in Higher Education 2004/05.

East West Locations, Service Sector Pay Database, 2006; Incomes Data Services, 2000-2006; IDS, Pay Benchmark, March 2006.

prospects.ac.uk; monster.co.uk; redgoldfish.co.uk; gisajob.com

www.widneswaterfront.co.uk



Further information

Sara Munikw Widnes Waterfront Programme Manager
sara.munikwa@halton.gov.uk

Jenny Carr Widnes Waterfront Project Officer
jenny.carr@halton.gov.uk

Halton Borough Council
Municipal Buildings, Kingsway
Widnes, Cheshire WA8 7QF
Tel: 0151 471 7347
www.widneswaterfront.co.uk

An independent report prepared for



people places property

01484 847004
www.ewlocations.com | east west locations ltd
the old dairy
bank top
marsden
hd7 6nj