



Gloucestershire
COUNTY COUNCIL

The Forest of Dean Story

2005

Produced by the Gloucestershire County Council Environment Directorate
Research Team, 2005.

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Introduction

The County & District Stories

The Gloucestershire Stories aim to provide a range of readers with key datasets from various agencies that can be used as a useful reference source or as a starting point for further research. There are seven reports in the series (one for each district and the county as a whole) and each is structured around the thematic delivery aims of Gloucestershire County Council & Gloucestershire Strategic Partnership:

- To provide learning throughout life
- To support those most in need
- To manage and enhance the Gloucestershire environment
- To meet local transport needs
- To support & encourage a thriving local economy
- To promote safer communities

The Stories are being continually developed and it is envisaged that they will soon be transferred into a web-based format. For further information on the District Stories (including details of joining the steering group) please contact Karen Ferrier on 01452 42 6703 or Email research@gloucestershire.gov.uk. Further details on other publications from the Environment Research Team can be found in Appendix A.

The GCC Environment Directorate Research Team

The Environment Directorate Research Team aim to provide high quality data, research and analysis to a range of users from local decision makers to members of the public. The team itself is divided into four sub-teams, each reflecting a particular area of expertise.

- **Demographic Research** produce population estimates and projections, census analysis, and general thematic research (including the District Stories). Contact Karen Ferrier or Paul Lewis (01452 42 67703/ 6522) or Email research@gloucestershire.gov.uk.
- The **Gloucestershire Labour Market Information Unit (GLIMIU)** focus on producing economic, labour market and business analysis and research. Contact Karen McDonald (01452 42 6747) or Email info@glmio.co.uk
- **Land use and Monitoring** monitor and analyse residential and commercial land availability, strategic land-use issues and maintain a community facilities database. Contact Gareth Ellison (01452 42 5685) or Email research@gloucestershire.gov.uk.
- **MAIDeN** provide neighbourhood and community level (i.e. “small area”) data/analysis, often in conjunction with external partnership organisations. Contact: David Cullum (01452 42 6871) or Email info@maiden.gov.uk

SUMMARY

Introduction

In population terms The Forest of Dean is one of the smaller Gloucestershire districts, but despite its beautiful rural setting there are a number of social problems faced by local residents. In particular, there are issues with affordable housing, health (especially cancer death rates), educational attainment, and an ageing population. Furthermore, while unemployment is low in the district, this is mainly due to large volumes of out-commuting by residents and the pervasive use of cars to make these journeys puts pressure on the sensitive local environment. However, it should also be noted that crime rates in the Forest of Dean are among the lowest in the county and the district leads the way in recycling waste.

The following summary provides key points from each thematic section of the main report. Each point is coded with an arrow that indicates whether it suggests a good performance, improvement or positive benefit to the Forest of Dean District (➔); a poor performance, decline or negative impact (⚡); or a mixed performance/ uncertain implication (↔). The page number for the main analysis is given in brackets.

1. Promote Learning Throughout Life

- ➔ On current trends the **0-19 population** would have a relatively small decline from 3600 in 2001 to 3350 in 2026. (7)
- ⚡ **Key Stage** results were fairly mixed with a number falling around or below the national average - in most Gloucestershire districts pupils score well above these levels. (8)
- ⚡ On current trends the **20-54 year old age group** would decline by 4300 over the next 20 years while the **55+ population** would increase by nearly 13,000. (10)
- ➔ **Basic skill levels** among adults in the Forest of Dean are generally in line with national averages. (11)
- ⚡ The adult population in the district has a relatively large proportion of people with no **qualifications** and relatively few with higher-level qualifications. (11-12)

2. Supporting Those in Need

- 🕒 In 2003 the rate of **stillbirth** was above the county and national average. (13)
- ➡ Between 1991 and 2001 there was a decrease in married couples with **dependent children** in the district and a rise in single parents and cohabiting couples. (15)
- 🕒 **Teenage pregnancy** rates in the district are below county and national averages. (16)
- 🕒 Around 28% of residents feel they have made insufficient **financial provision for retirement** – the highest level in the county. (19)
- 🕒 Death rates **cancer** in people aged under 75's have risen since 1999 and are now the highest of any district in the county. (20)
- ➡ Death rates from **circulatory disease** in people aged under 75 are above the county average but below the national level. (20)
- 🕒 Levels of **unpaid care** by residents are higher than both the county and national averages. (22)

3. Manage and Enhance the Gloucestershire Environment

- ➡ On current trends the **population** of the Forest of Dean would grow from 80,050 in 2001 to 87,050 in 2026. (24)
- 🕒 However, the **working age population** would decrease by around 1600 people over this period. (26)
- ➡ The number of **households** in the districts would grow from 32,150 in 2001 to 37,650 in 2026. (24)
- ➡ Around half of the house building set out in the **Structure Plan** was completed between 1991-2004 with the remainder to be finished by 2011. (25)
- 🕒 The Forest of Dean had the highest **recycling** rates in the county – mainly thanks to a large emphasis on composting. (25)

4. Meeting Local Transport Needs Effectively

- 🔊 There are high levels of **car ownership and use** among the Forest of Dean population. (26,29)
- 🔊 The average **distance travelled to work** by residents is higher than the county and national averages and there are high levels of out-commuting (particularly to Gloucester). (27)
- 🔊 Despite increases in the size of the working population, the number of people using **public transport** actually declined between 1991-2001. (28)
- 🔊 The average growth of daily **traffic volumes** was higher in the Forest of Dean than the county as a whole. (30)

5. Support and Encourage a Thriving Local Economy

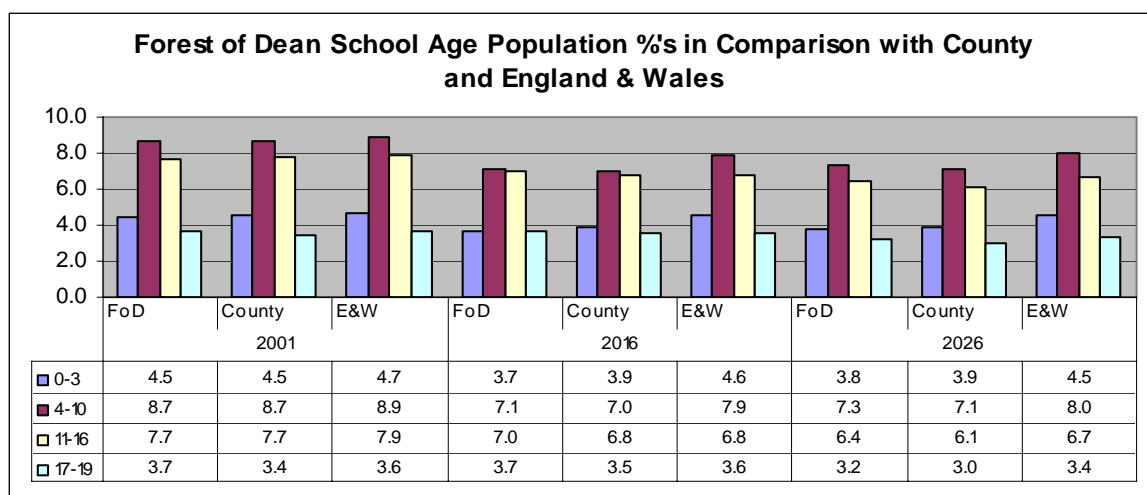
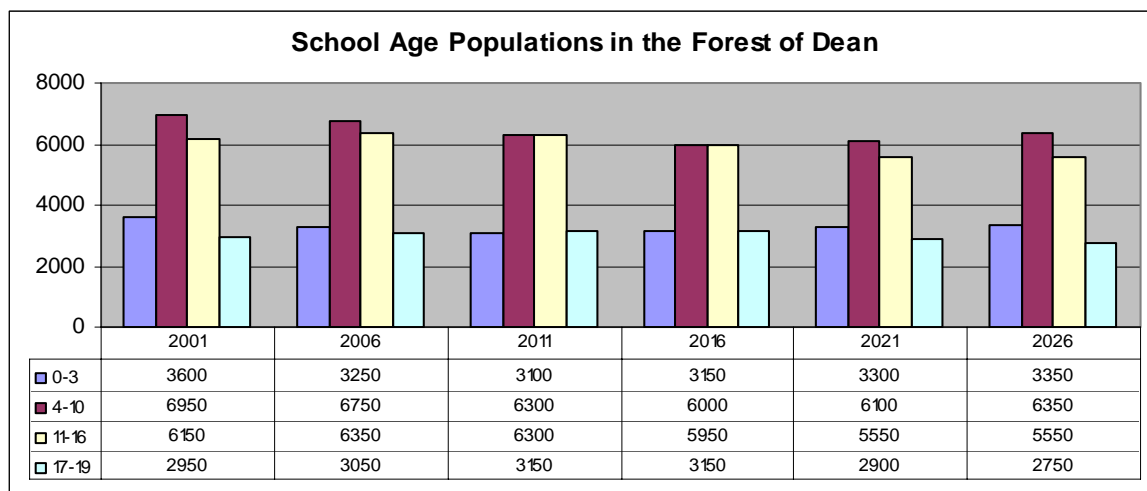
- 🔊 Labour demand by the local economy has been consistently lower than the **supply of labour** available through the local workforce and this looks set to continue. (31)
- 🔊 The Forest of Dean has a strong manufacturing and primary industrial base and the move towards a service-orientated **economy** is less pronounced than in the county as a whole. (31)
- 🔊 The growth in the number of **VAT businesses** in the district was slightly below the county and national averages. (32)
- 🔊 The average **income** for workers in the district is below the county and national averages. (32)
- 🔊 The **average house price** in the Forest of Dean is 8.4 times the gross average annual wage of residents. This is in line with the county average and below the regional average. (33)
- 🔊 **Unemployment rates** are generally in line with the county average and are well below national levels. (36)

6. Promote Safer Communities

- 🔊 **Crime rates** in the Forest of Dean are among the lowest in the County. (37-39)
- 🔊 Residents perceive their neighbourhood to be **safe in daylight** and relatively **safe at night**. (40)

1. PROVIDE LEARNING THROUGH LIFE

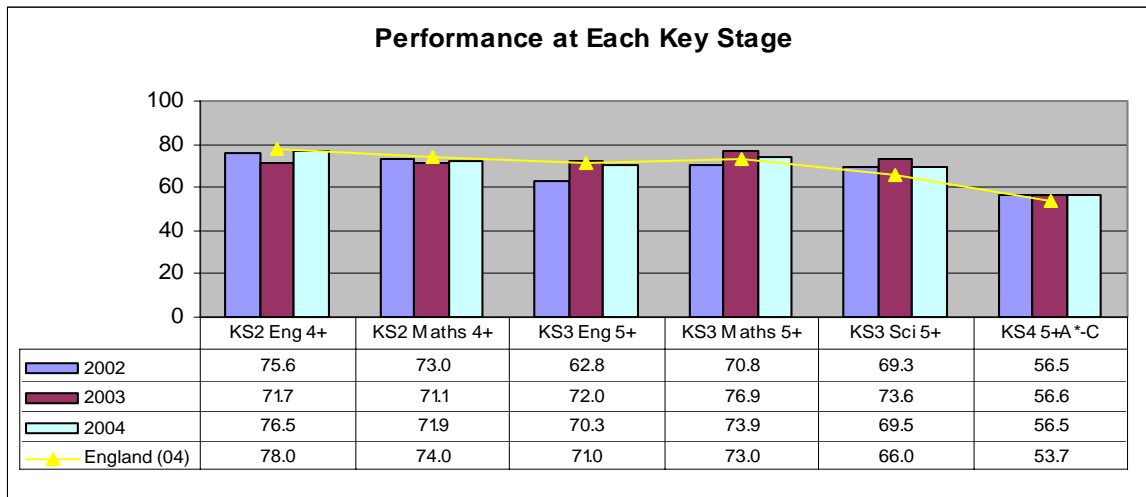
A. School Age Groups



Source: Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005). England & Wales Projections produced in 2004 by Government Actuaries Department (GAD)¹.

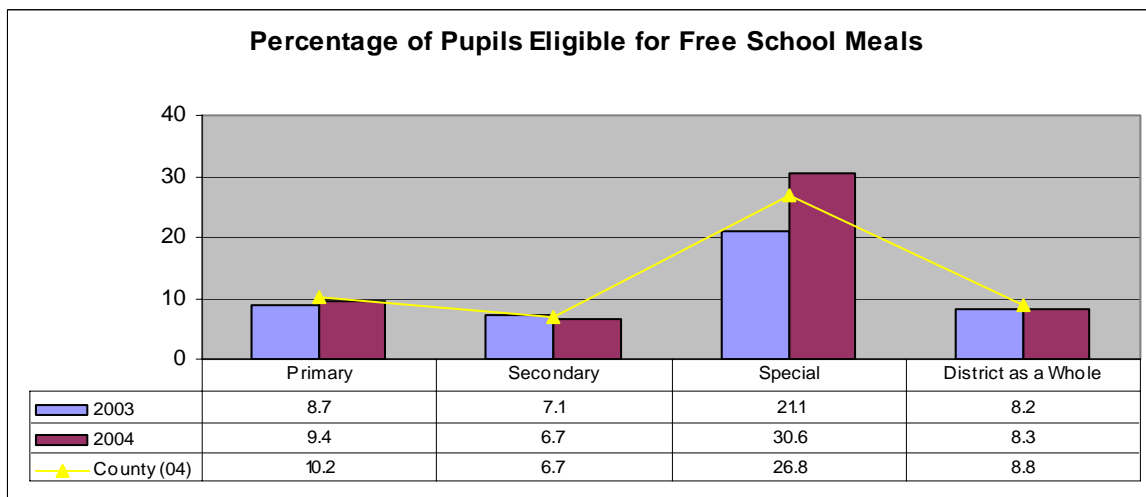
- On current trends the 0-19 population in the Forest of Dean would decline by around 1650 people between 2001 and 2026.
- While this is a relatively modest fall compared to other districts, in combination with a large increase in the number of older people it will significantly change the structure of the population.
- For example, in 2001 approximately 24.6% of the population was made up of 0-19 year olds but this would fall to 20.7% in 2026. This can be compared to the falls in the county as a whole (24.3% in 2001 down to 20.2% in 2026) and the national change (25.2% to 22.5%).
- This essentially reflects an “ageing” of the population in the district.

¹ Trend based projections are estimates based on current trends. If the reader is interested in viewing projections that factor in predicted changes in house building (based on the latest Structure Plan) then please refer to the report on the GCC website (<http://www.gloucestershire.gov.uk/index.cfm?articleid=140>). All projections data in this report rounded to nearest 50.



Source: Qualifications and Curriculum Authority (QCA), provided by Education Directorate, Gloucestershire County Council

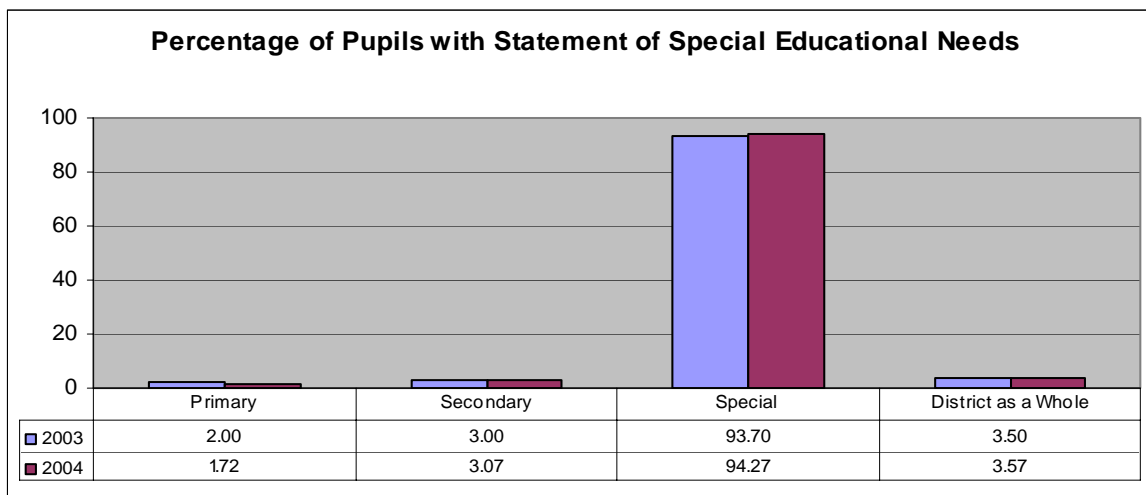
- The Key Stage² results of the Forest of Dean pupils generally improved or remained stable between 2002-2004.
- The 2004 performance was fairly mixed, with KS3 Science and KS4 results exceeding the national average and the remainder being either around or below this benchmark.
- Although it is difficult to generalise, the 2004 results in the Forest of Dean did equate roughly to the second lowest aggregate Key Stage performance in the county after the Gloucester City District.



Source: Schools Absence Return, provided by Education Directorate, Gloucestershire CC

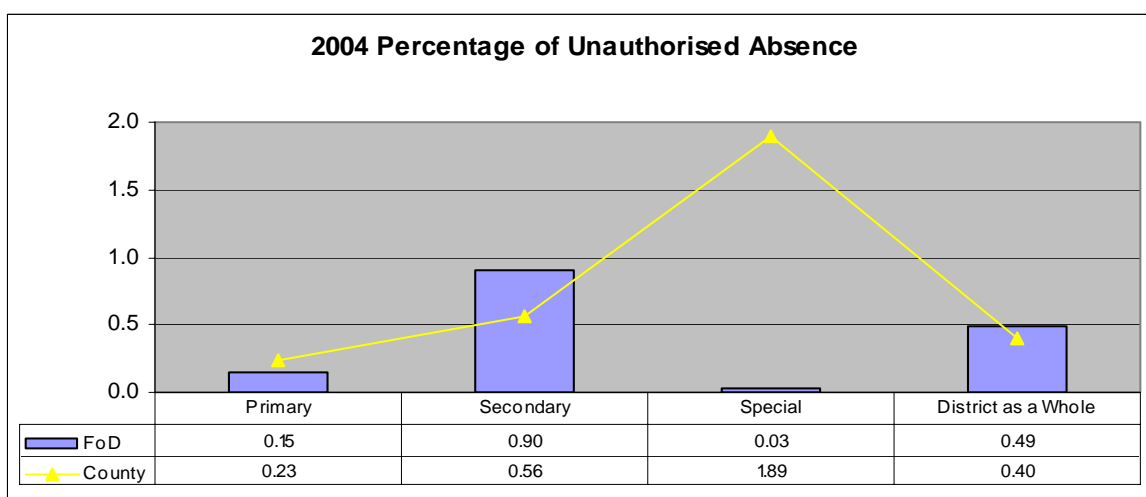
- The overall proportion of Forest of Dean pupils eligible for free school meals was below the county average, although this varied between different types of school.
- In particular the proportion of eligible pupils in special schools was well above the county level.

² Key Stage 2 tests taken at age 11, Key stage 3 tests taken at age 14, Key stage 4 GCSEs taken at age 16.



Source: Pupil Level Annual School Census (PLASC), provided by Education Directorate, Gloucestershire County Council

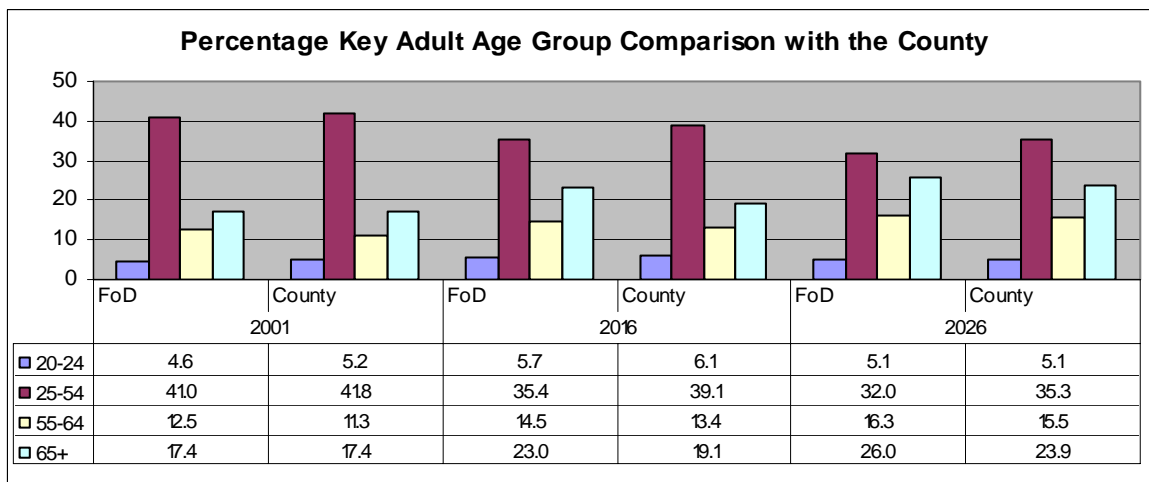
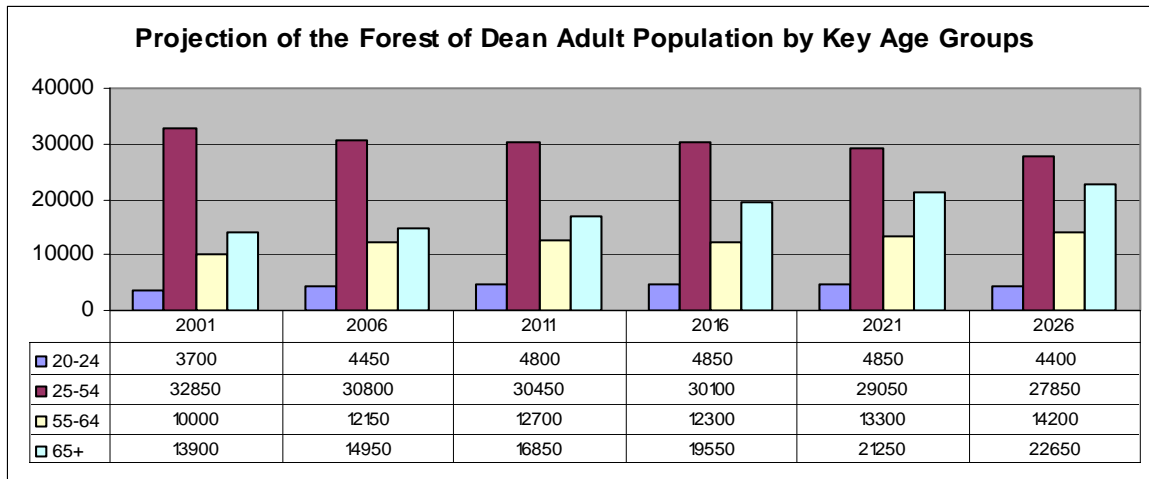
- The percentage of Forest of Dean pupils with special needs (SEN) changed very little between 2003-2004.
- The most noticeable change was a relatively small fall in the proportion of SEN pupils in primary schools.



Source: School Absence Return, provided by Education Directorate, Gloucestershire CC

- Unauthorised absence among Forest of Dean pupils was around the county average in 2004, but there was wide variation across different types of school.
- Absence levels in special schools were very low in the district while they were slightly above the county level in secondary schools.
- It should be noted however that the actual numbers involved are relatively small.

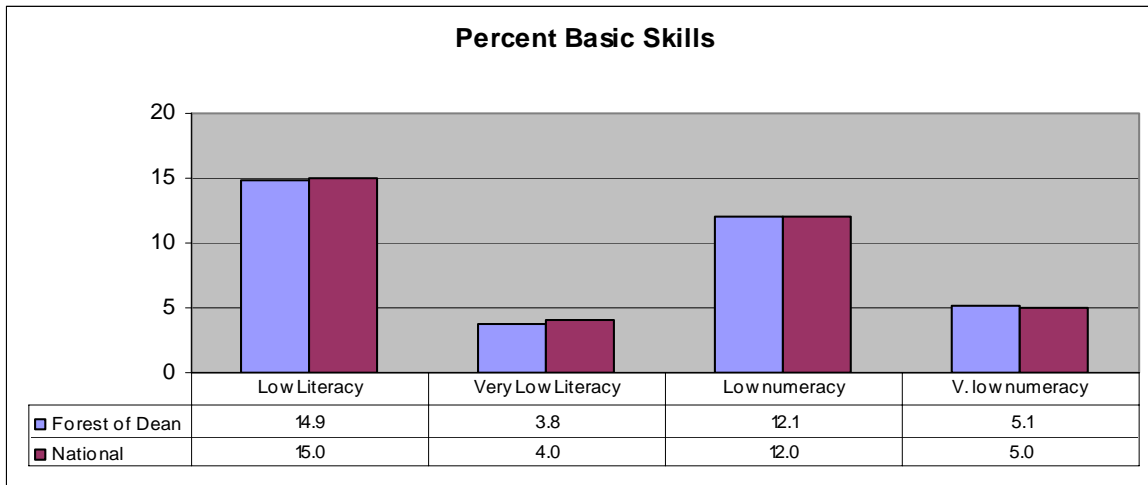
B. Adult Education



Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

- On current trends the population aged 20+ would increase from 60,450 in 2001 to 69,100 in 2026.
- There are however wide variations between age groups with the 20-54 population declining by 4300 people and the number of people aged 55+ increasing by nearly 13,000.
- This would “age” the population, leaving proportionately fewer younger people in the population than there are currently.
- This change is more acute in the Forest of Dean than the County as a whole. For example, the proportion of people aged 65+ was 17.4% for both the Forest of Dean and county in 2001. However, by 2026 the 65+ group would make up 26% of the Forest of Dean population compared to 23.9% for the whole county.

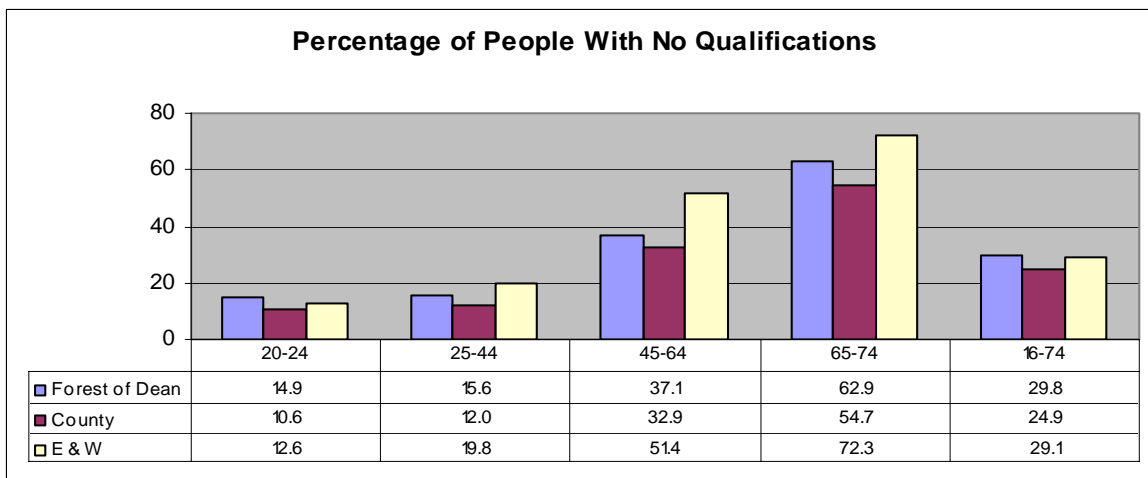
Basic Skills³



Source: Basic Skills Agency (1997) <http://www.basic-skills.co.uk>

- Basic skill levels in the Forest of Dean are generally in line with national averages.

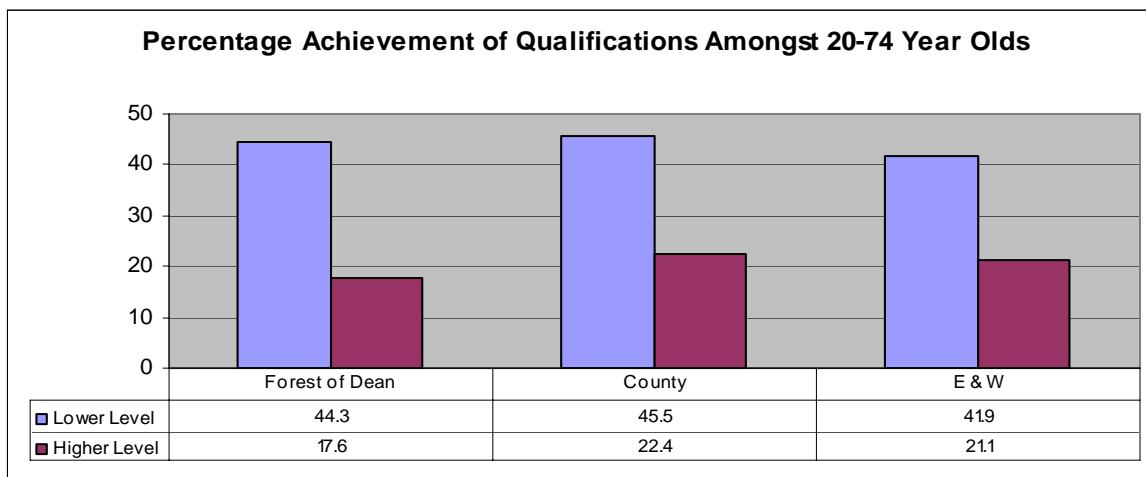
Qualifications



Source: 2001 Census, Office of National Statistics © Crown Copyright

- The proportion of the Forest of Dean population with no qualifications is higher than the county and national averages in each age category.

³ Basic Skills figures may be slightly lower than previous data due to a raising of threshold standards.

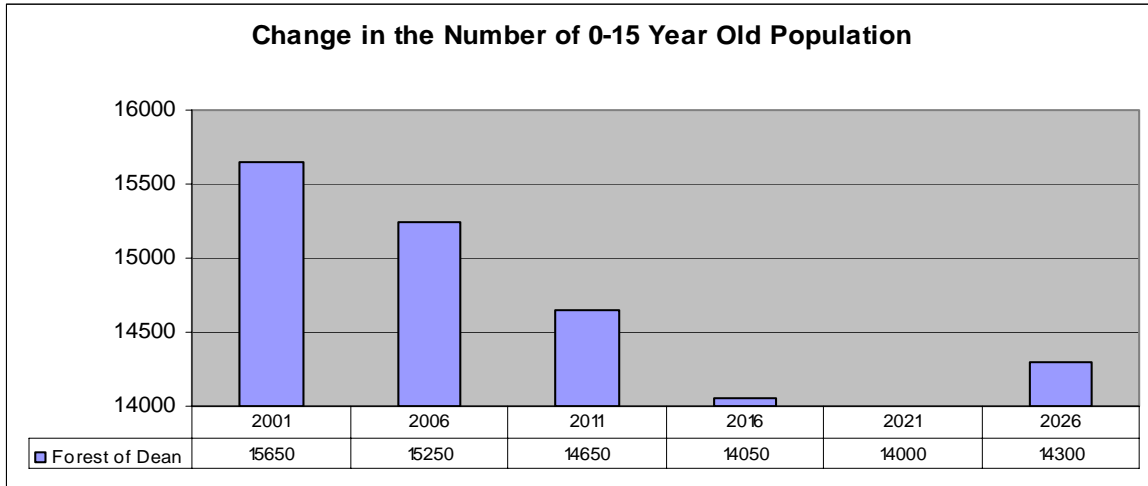


Source: 2001 Census, Office of National Statistics © Crown Copyright

- The proportion of Forest of Dean residents with lower level qualifications (up to and including A levels) is just below the county average but above the national average.
- However, the proportion of residents with higher qualifications (degree equivalent and above) is well below the county and national averages.

2. SUPPORTING THOSE IN NEED

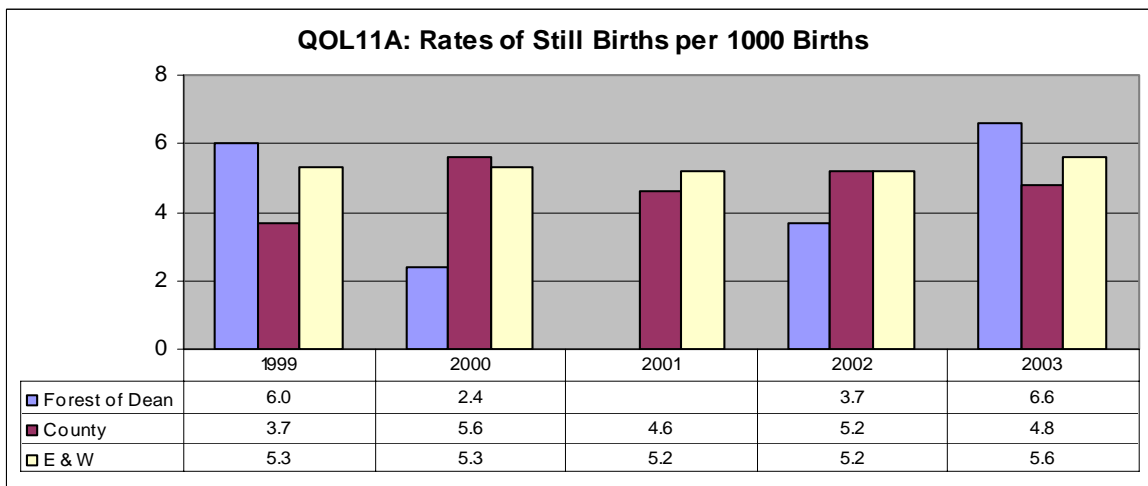
A. Young People



Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

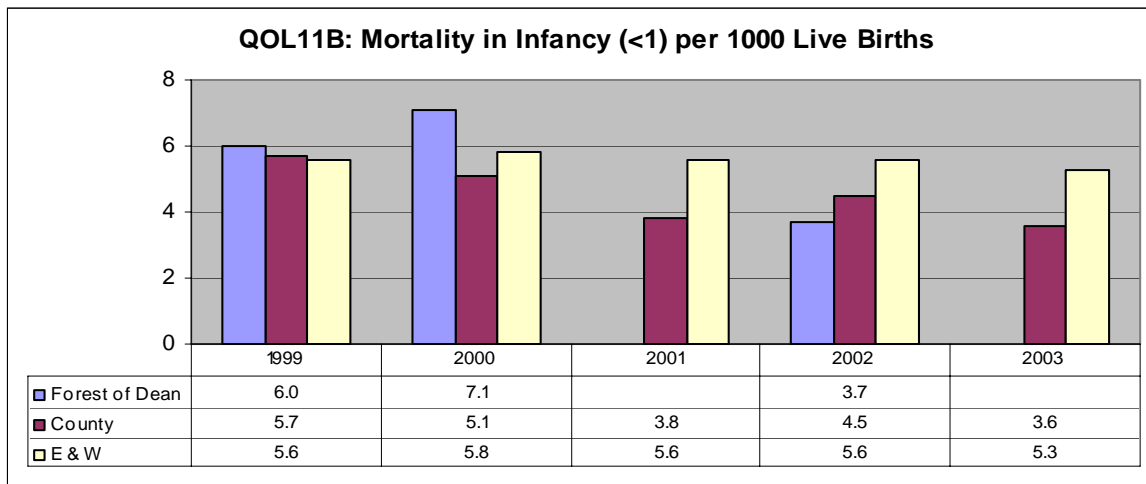
- On current trends the number of 0-15 year olds in the Forest of Dean would decline from 15,650 in 2001 to 14,300 in 2026.
- This 9% fall is lower than the fall projected for the county as a whole (15.6%).

Child Mortality



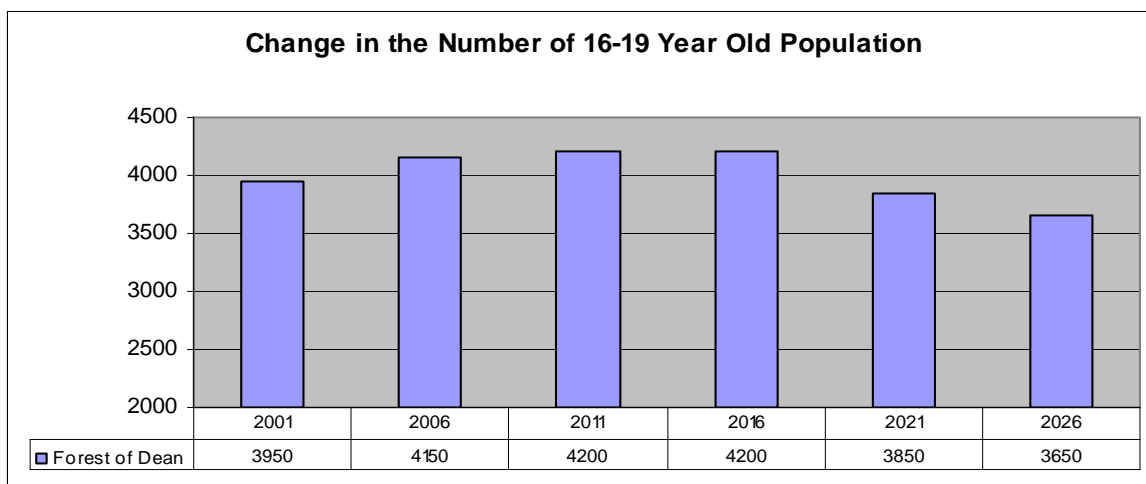
Source: Audit Commission Quality of Life Indicators (11A) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- The rate of stillbirths in the Forest of Dean varies considerably year on year (a reflection of the relatively small numbers involved), and in 2003 was above both the county and national levels.



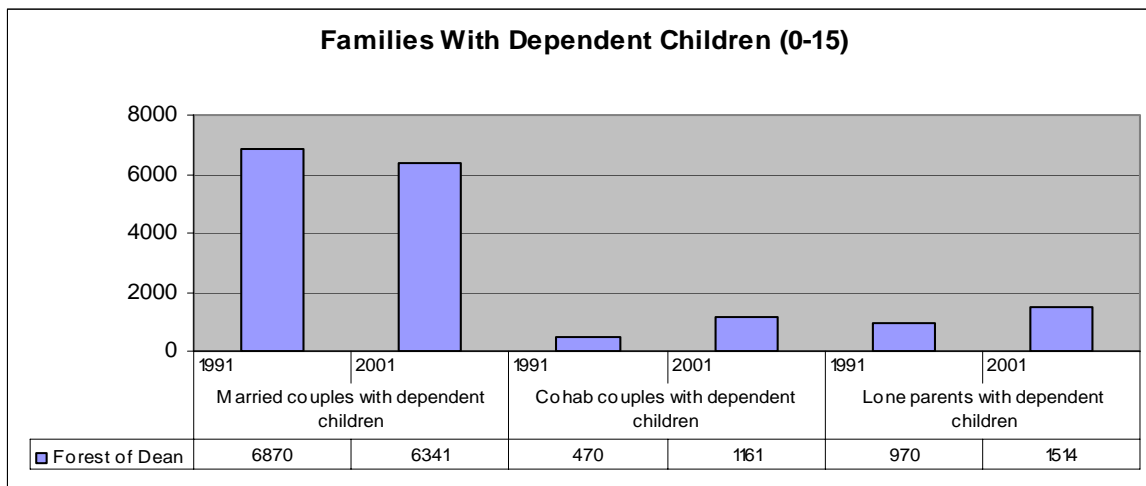
Source: Audit Commission Quality of Life Indicators (11A) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- There were fewer than 5 infant deaths in Forest of Dean in 2003 and as a result the data has been suppressed to prevent individual disclosure. It is therefore not possible to compare the district rate with the county and national rate.



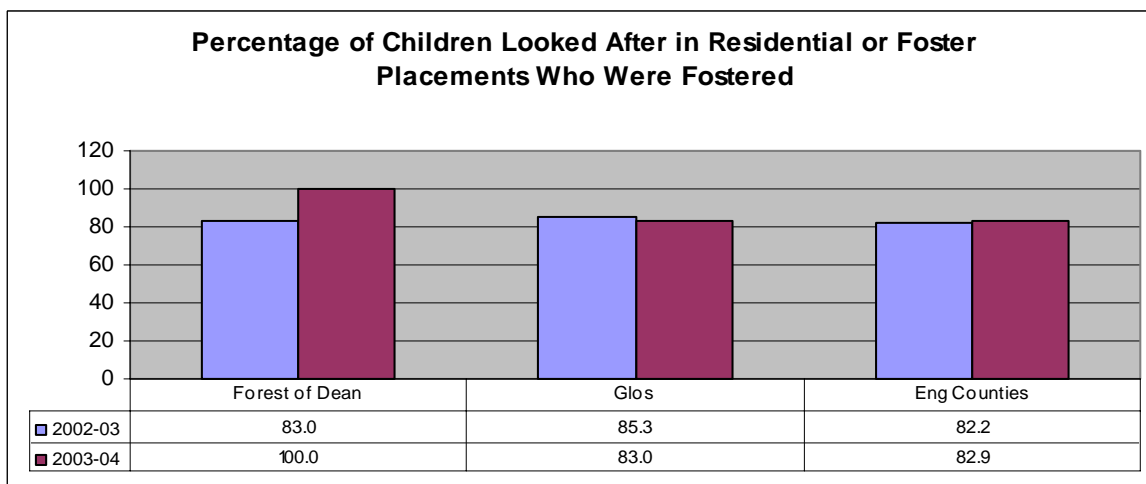
Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

- On current trends the number of 16-19 year olds in the Forest of Dean district would fall from 3950 in 2001 to 3650 in 2026, with a peak between 2011 and 2016.



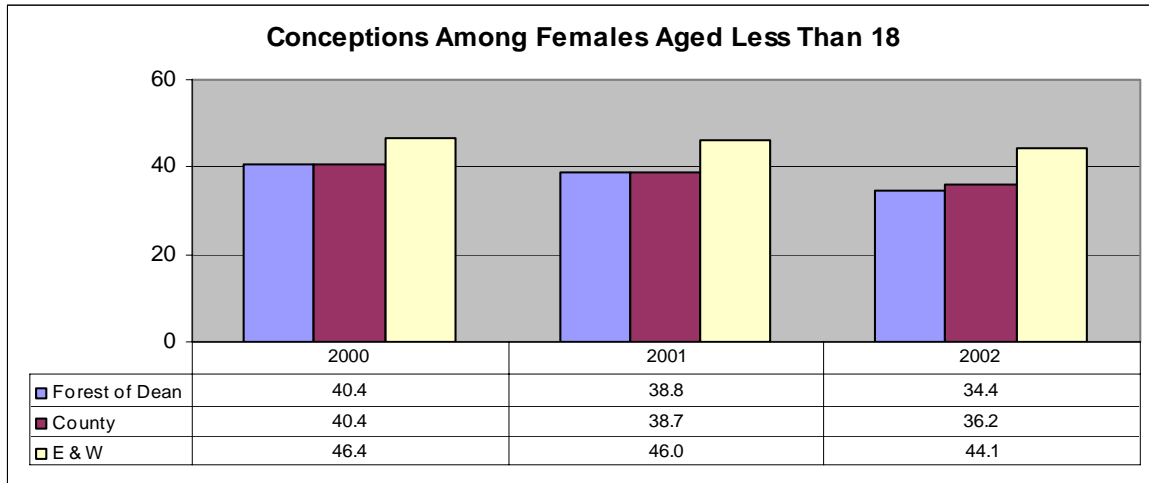
Source: 2001 Census, Office of National Statistics © Crown Copyright

- The number of married couples with dependent children in the district decreased between 1991 and 2001, while the number of cohabiting couples with dependent children and lone parents increased.
- The 7.7% decrease in married couples with dependents was less of a fall than the national or county rate (14.1% and 8% respectively).
- The 147% increase in cohabiting couples with dependents was the second highest in the county (the overall county rate being 113.7%).
- Lone parents increased by 56.1% - the highest increase across districts. This increase was substantially more than the county and England and Wales (35.9% and 25.8%).



Source: PAF B7, Supplied by Gloucestershire Social Services

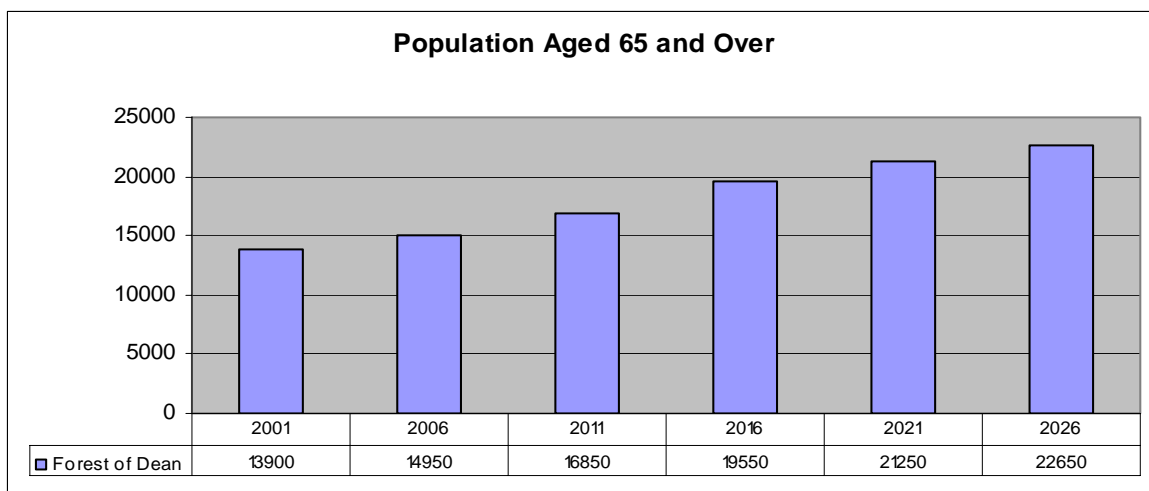
- All of the children in Forest of Dean placements were fostered in 2003-04 and this is above both the county and national levels.
- However, it should be noted that large annual fluctuations can occur at the district level due to the relatively low overall numbers involved.



Source: Public Health Compendium of Clinical and Health Indicators, 2003

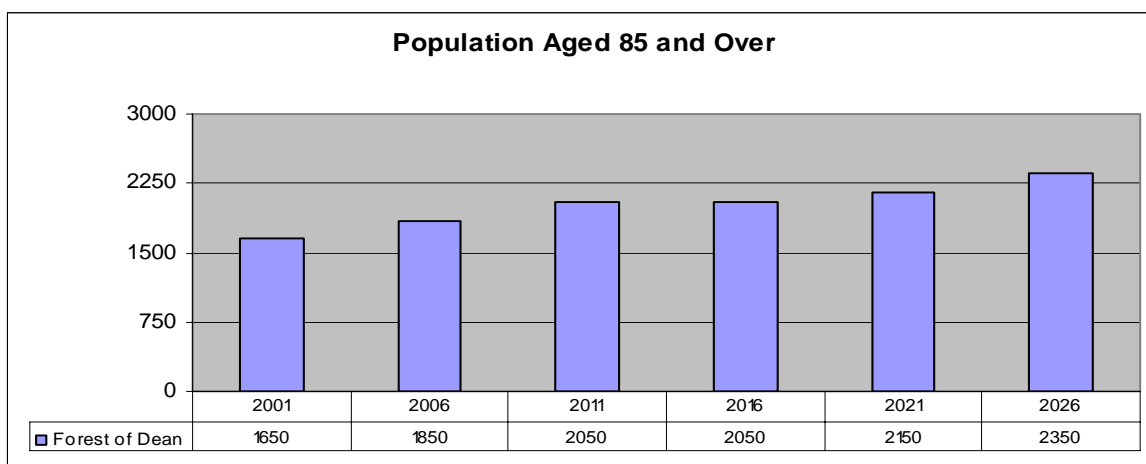
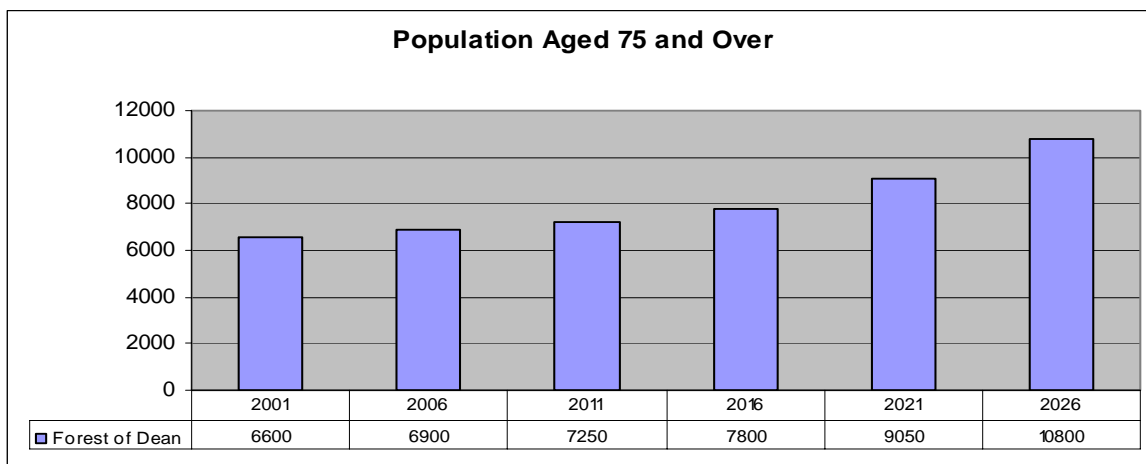
- The teenage pregnancy rate in the Forest of Dean has declined steadily in recent years and in 2002 stood below both the county and national levels.

B: Older People



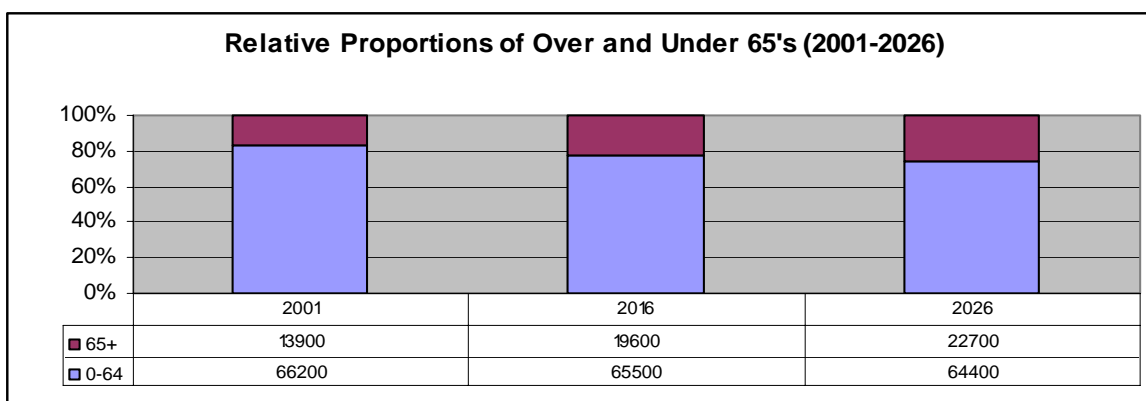
Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

- On current trends there would be a very large increase in the number of people aged 65+ living in the Forest of Dean from just under 14,000 in 2001 to 22,650 in 2026.



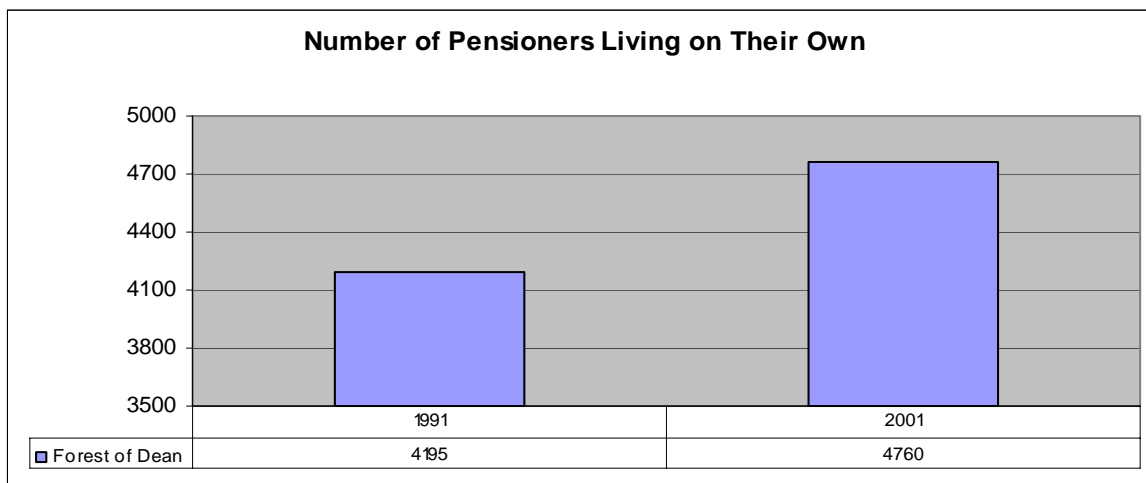
Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

- On current trends there would be a 63% increase in the number of people aged 75+ in the district and a 42% increase in the 85+ age group.



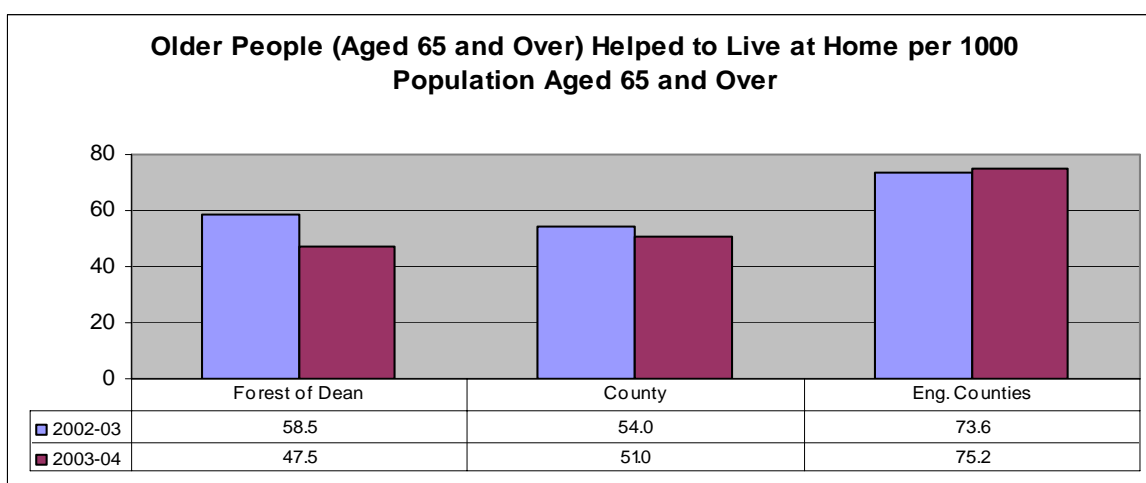
Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

- The net effect of these changes would be to age the population. For example, in 2001 the 65+ age group made up 17% of the population but this would increase to 26% by 2026.



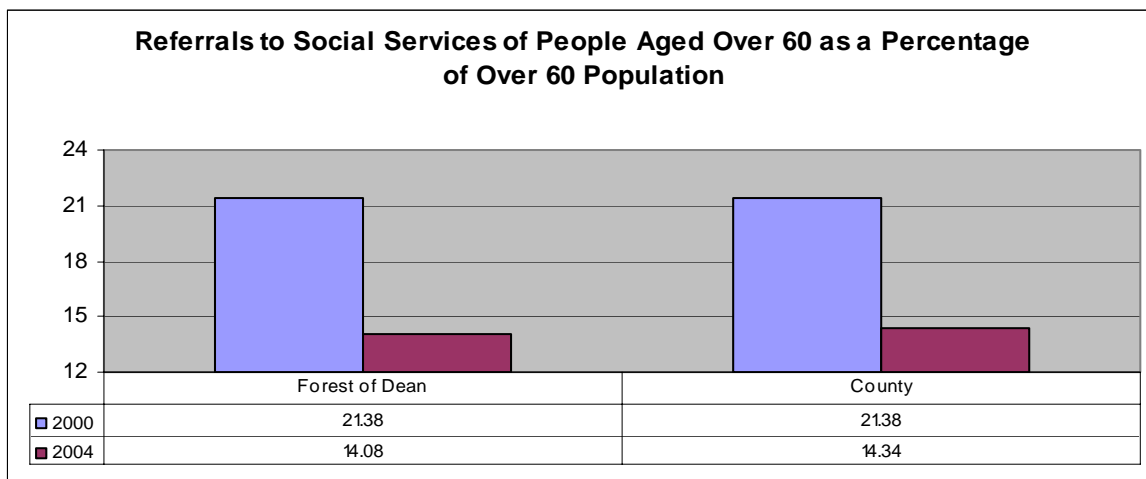
Source: 1991 and 2001 Census, Office of National Statistics © Crown Copyright

- The number of pensioners living on their own in the Forest of Dean increased from 4195 in 1991 to 4760 in 2001.
- This is likely to be a reflection of the increasingly ageing population and the popularity of the district as a retirement destination.



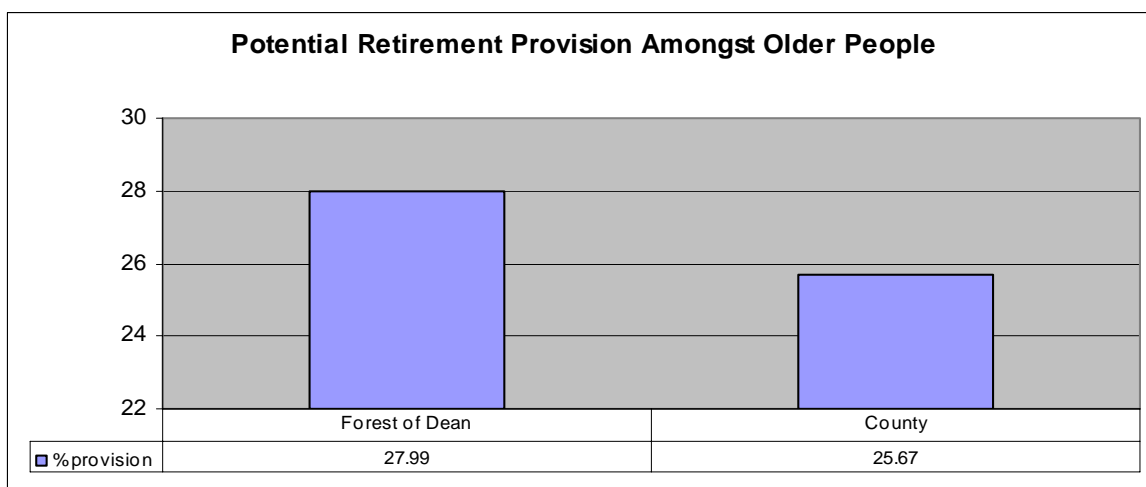
Source: BVPI 54, PAF C32, provided by Gloucestershire County Council Social Services.

- The number of Forest of Dean residents aged 65+ who were helped to live at home decreased between 2002-03 and 2003-04.
- In 2003-04 the rate was below the county level and well below the national benchmark.
- This should be considered in the light of high levels of *unpaid care* by residents of the district (page 22).



Source: Gloucestershire County Council Information Research Team, Social Services Directorate, Provided by MAIDeN 2004; Office of National Statistics Mid-year Estimates 2003.

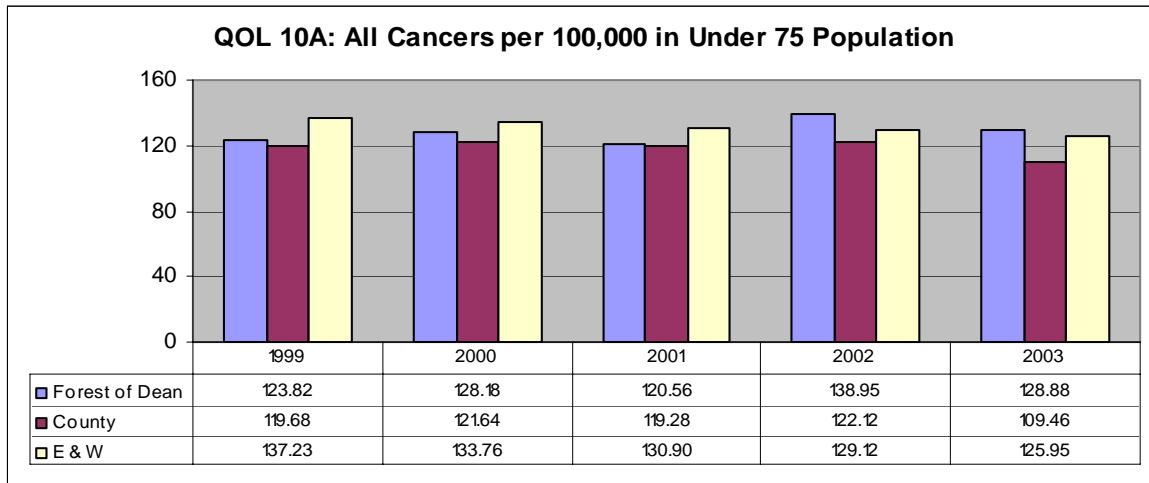
- The proportion of over 60's referred to Social Services fell considerably between 2000 and 2004 in the Forest of Dean.
- This decline closely mirrored the fall seen in the county as a whole.



Source: MAIDeN 2003

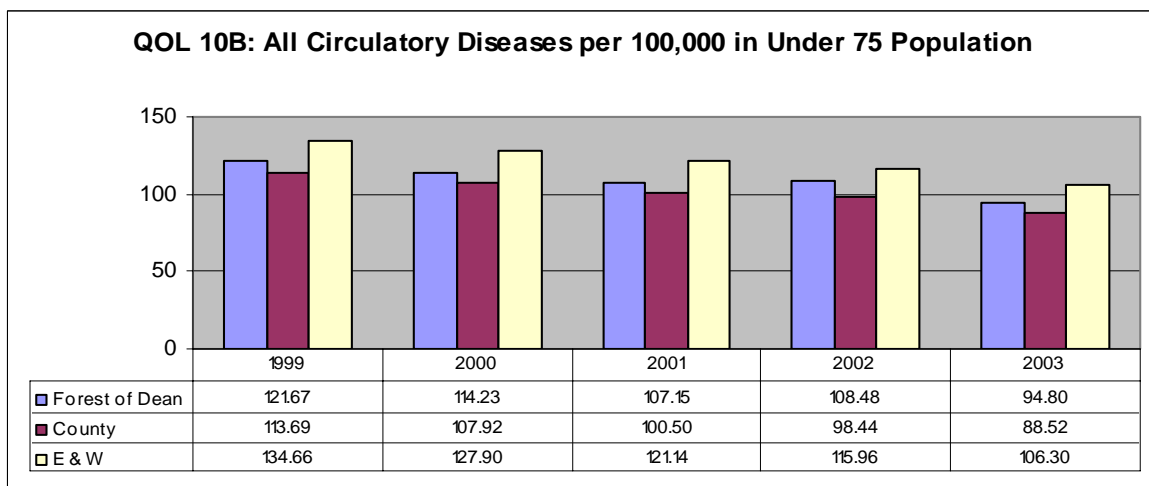
- This measure is based on a sample survey and asks working age people for a subjective judgement about whether they have made sufficient financial provision for retirement.
- It shows the worrying prospect that more than a quarter of respondents (27.99%) may need aid of some sort in retirement - this is the highest level of any individual district in the county.
- It should also be recalled that the Forest of Dean has a rapidly ageing population and so this problem could be particularly acute in the medium term.

C: Health



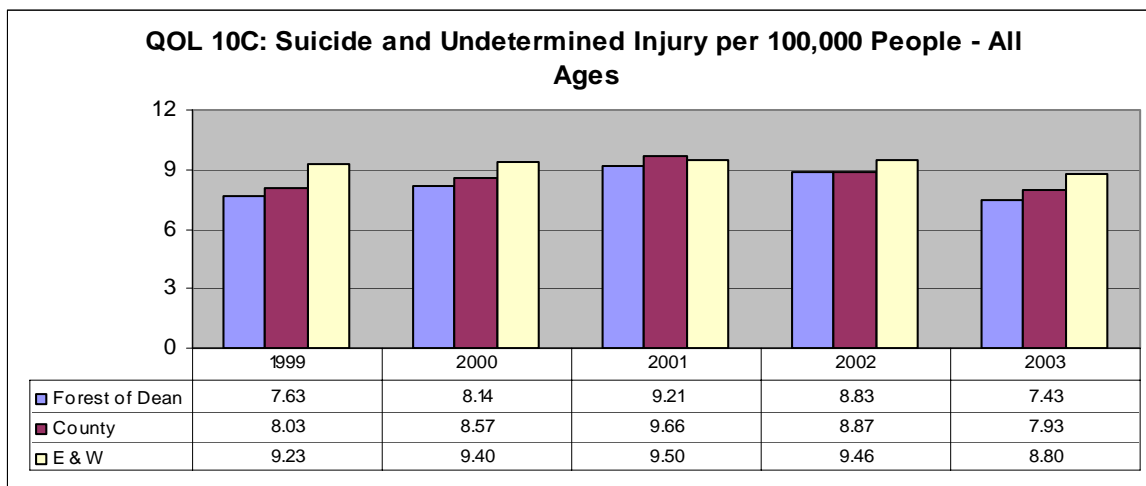
Source: Audit Commission Quality of Life Indicator (10) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- Death rates from cancer in the Forest of Dean were higher in 2003 than they had been in 1999. This is very much out of keeping with the county and national downward trend over this period.
- The Forest of Dean has a higher cancer death rate than any district in the county.



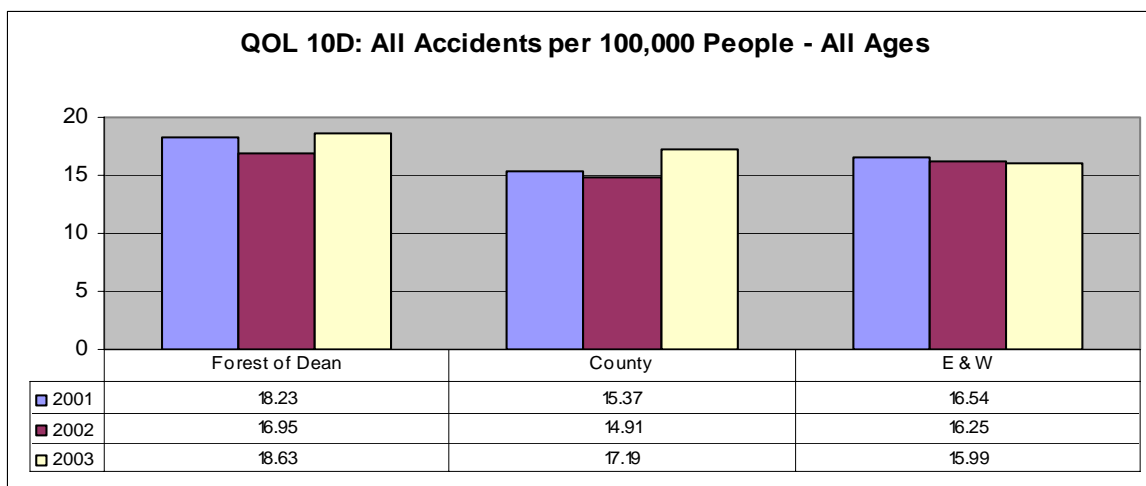
Source: Audit Commission Quality of Life Indicator (10) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- The death rate from circulatory disease fell considerably in the Forest of Dean between 1999 and 2003.
- The 2003 rate in the district was higher than the county average but lower than the national average.



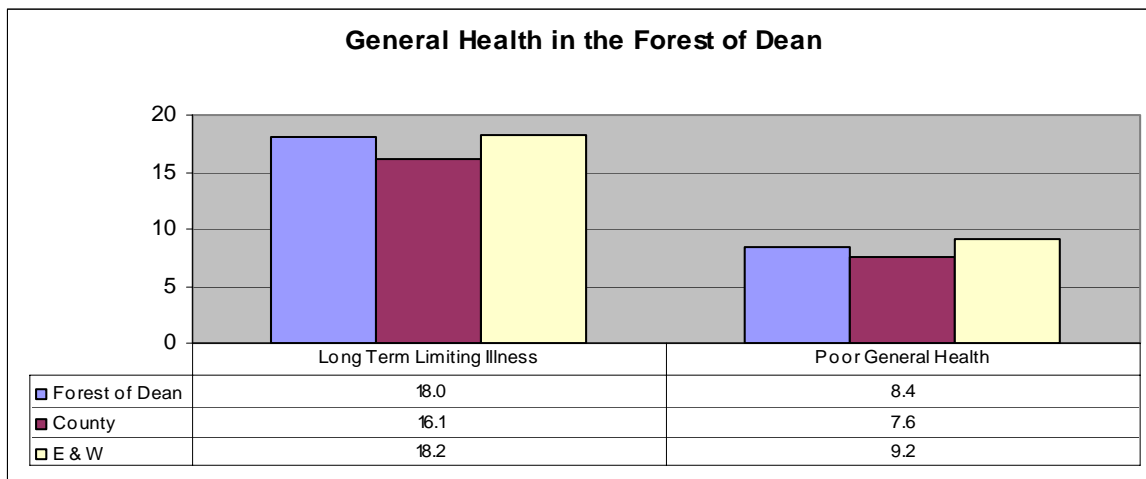
Source: Audit Commission Quality of Life Indicator (10) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- At a district level the suicide and undetermined injury death rate fluctuates considerably year on year due to the relatively low numbers involved.
- In 2003 the Forest of Dean had a lower rate than the county and national average and this has generally been the case since 1999.



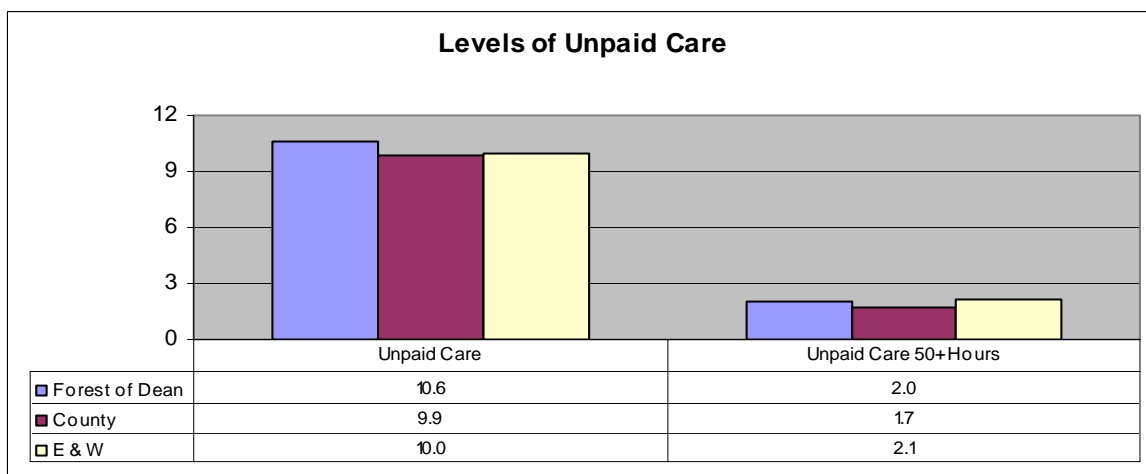
Source: Audit Commission Quality of Life Indicator (10) compiled from Public Health Compendium of Clinical and Health Indicators (2004), provided by Gloucestershire Public Health Intelligence Unit.

- The accident death rate in the Forest of Dean remained above both the county and national rate between 2001 and 2003.



Source: 2001 Census, Office of National Statistics © Crown Copyright

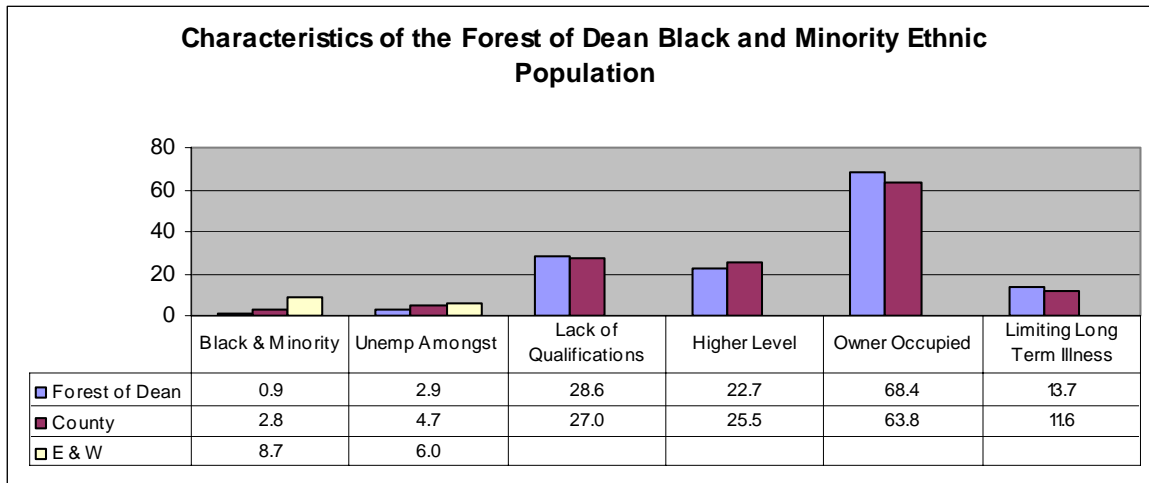
- According to the 2001 National Census, the Forest of Dean has comparatively poor health levels with limiting long-term illness (LLTI) and “poor general health” levels being among the worst across Gloucestershire.
- Both LLTI and poor general health are above (i.e. worse than) county levels. LLTI also marginally exceeds national rates, while poor general health is only slightly better than England and Wales.
- Both of these health measures are subjective and may not have been verified by a medical practitioner.



Source: 2001 Census, Office of National Statistics © Crown Copyright

- Overall levels of unpaid care are higher in the Forest than in the county and England and Wales as a whole. They are also the highest across districts, probably as a result of the relatively poor health in the district.
- 4.8% of people over 75 are providing more than 20 hours unpaid care in the Forest of Dean - the highest in any district with the exception of Gloucester.
- The proportion of people providing extensive periods of care (50 or more hours) is higher in the Forest than the county average, but is similar to national levels.

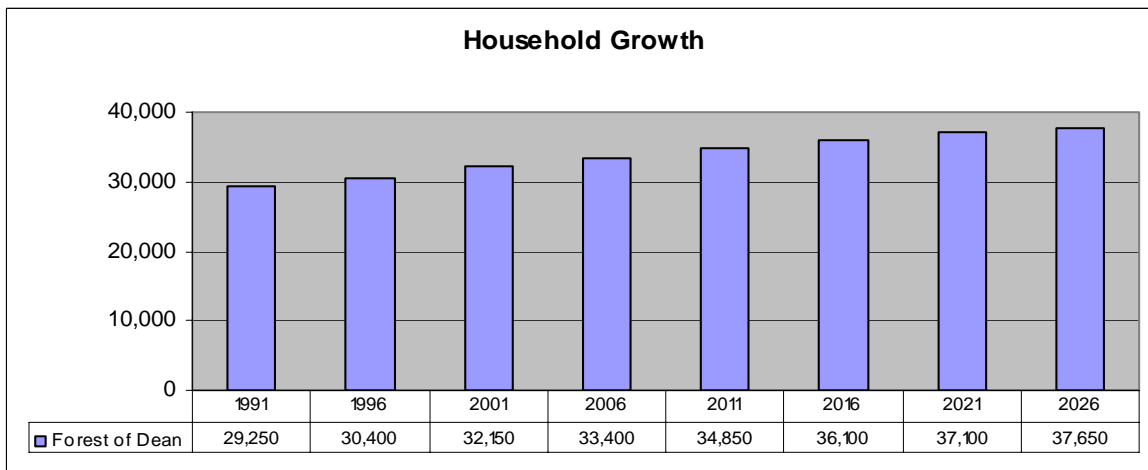
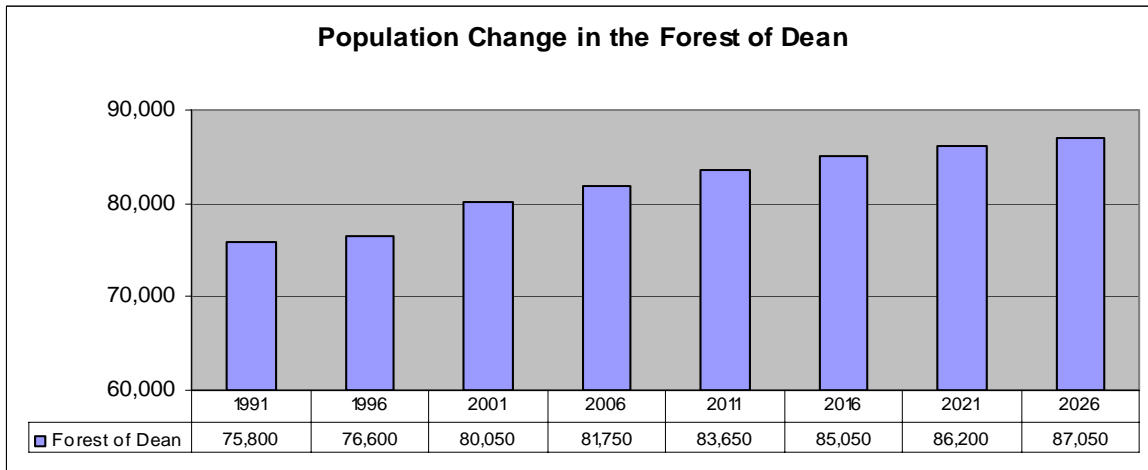
D: Ethnicity



Source: 2001 Census, Office of National Statistics © Crown Copyright

- The Forest of Dean has a small Black & Ethnic Minority (BME) population numbering just over 700 people.
- The level of unemployment in the BME population is lower than that at a county or national level, and is slightly lower than the “white” population in the district (3.0%).
- “Lack of qualifications” among the Forest of Dean’s BME population are above the county level, but are again lower than the white population (29.8%)
- The BME population’s attainment of higher-level qualifications in the Forest of Dean is lower than the county, but quite high in comparison to the white population (16.4%).
- Owner occupation is at its highest across districts among the Forest of Dean’s BME population.
- Although limiting long-term illness (LLTI) is relatively high among the BME population compared to the county average, they are much lower than the Forest of Dean’s white population.

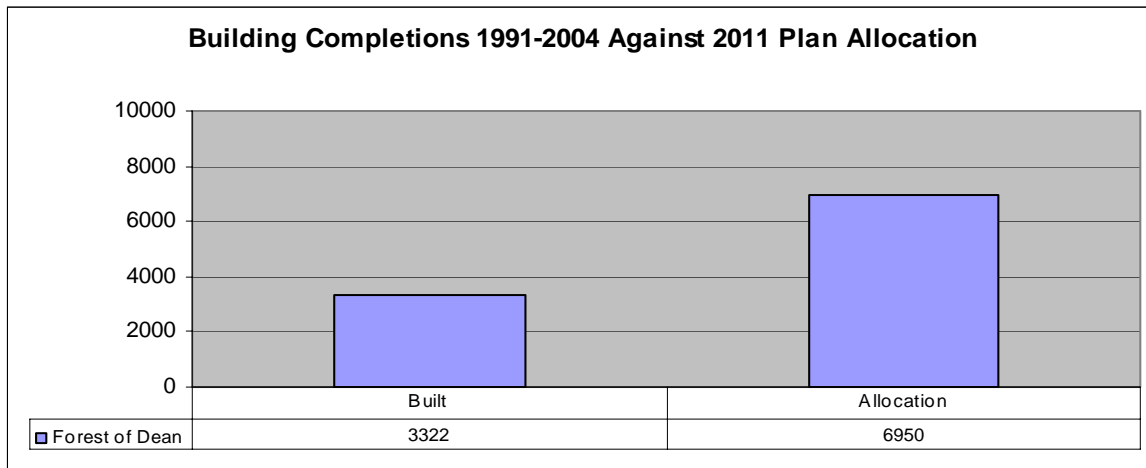
3. MANAGE AND ENHANCE THE GLOUCESTERSHIRE ENVIRONMENT



Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

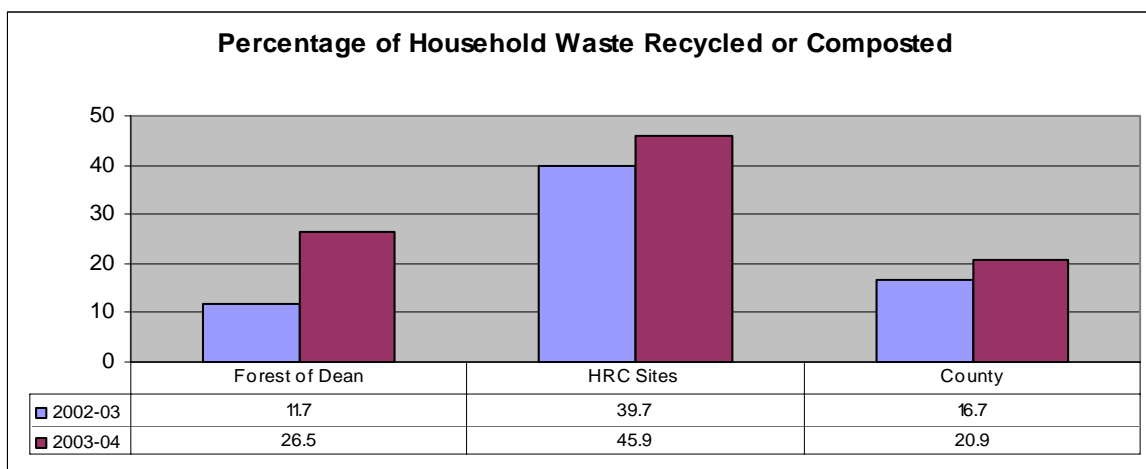
- On current trends the population of the Forest of Dean would grow from 80,050 in 2001 to 87,050 in 2026.
- This 8% growth rate is almost double that of the county as a whole.
- The number of households would grow by 5500 over this period – a trend that is strongly influenced by a decrease in the average number of people per household.
- It should be noted that these figures are derived from a trend-based model and so would not take into account external factors that affect population and household changes (in particular planned changes in growth of housing).⁴

⁴ For a model that factors in predicted changes in house-building (based on the latest edition of the County Structure Plan) please refer to the projections report on the following website: <http://www.gloucestershire.gov.uk/Environment/Glin/reportsarchive.htm>



Source: Research Team, Environment Directorate, Gloucestershire C.C.

- Between 1991 and 2004 around 48% of the houses planned to be built in the Forest of Dean (as set out in the Structure Plan) had been completed.
- Assuming that there were 7 further years in which to meet the allocated target, around 520 houses would have to be built in the district per year compared to a rate of 255 per year between 1991 and 2004.

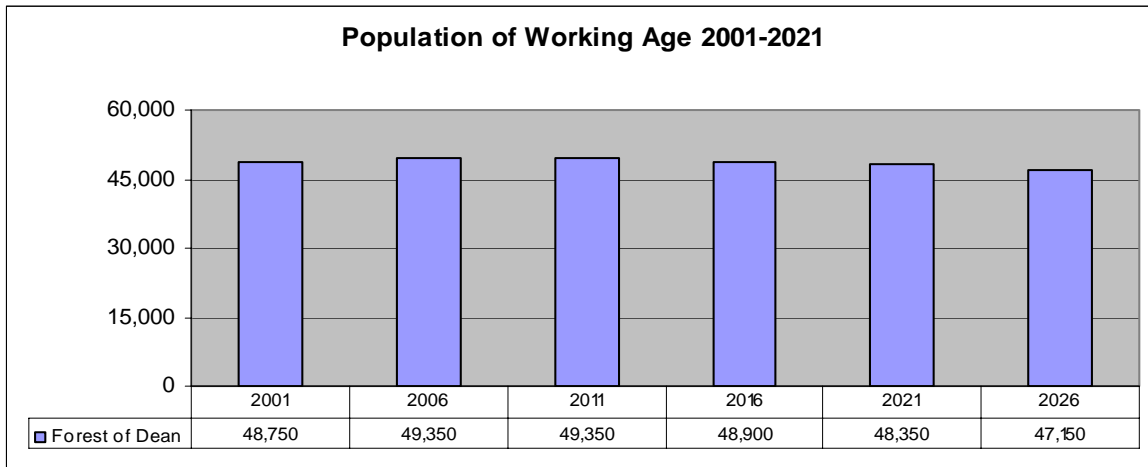


Source: Waste Management Team, GCC Environment Directorate

- The Forest of Dean had the highest recycling and composting rate of any district in the county.
- This result was strongly influenced by an emphasis on composting in the district, which accounted for 15% of waste disposal. This can be compared to very little composting in other districts, with the next highest level being 2.8% in the Cheltenham District.

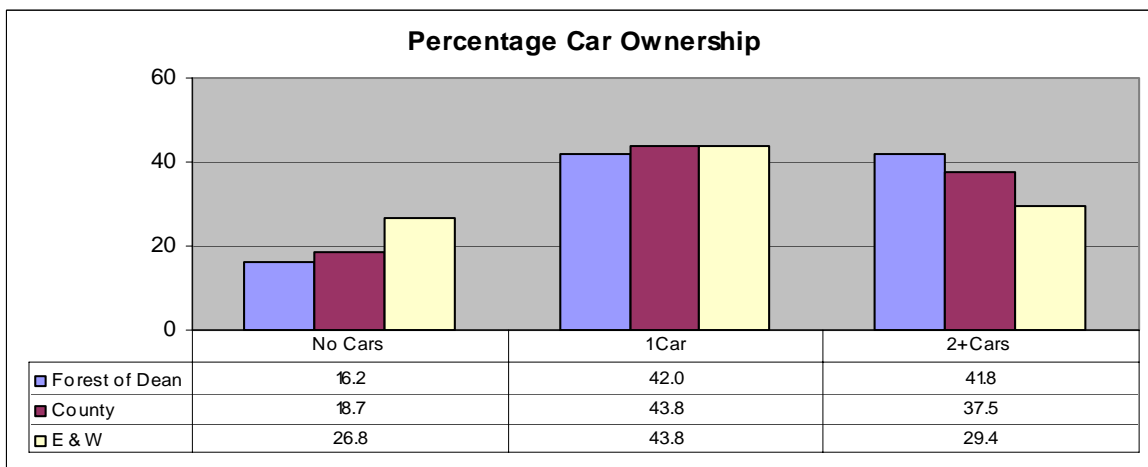
4. MEETING LOCAL TRANSPORT NEEDS EFFECTIVELY

A. Car Ownership



Source: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005)

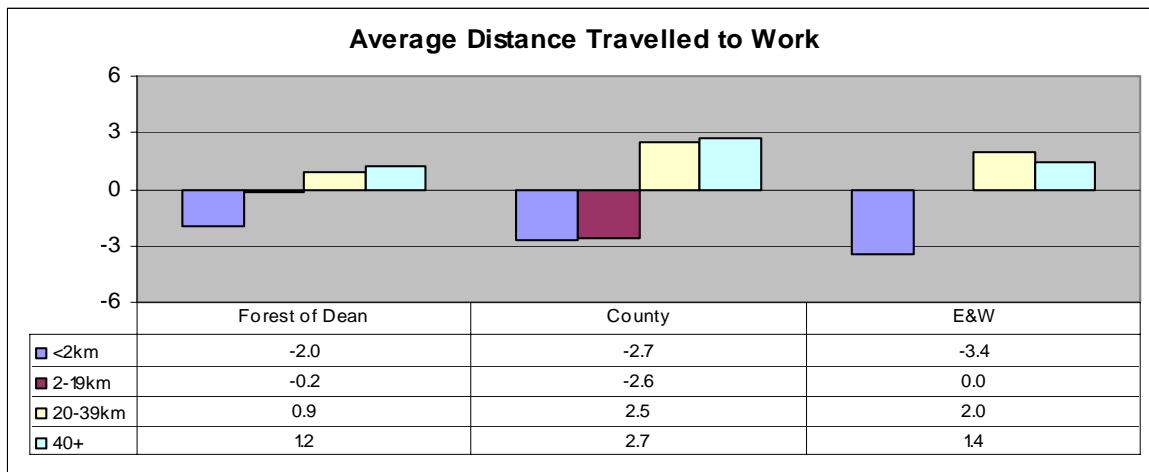
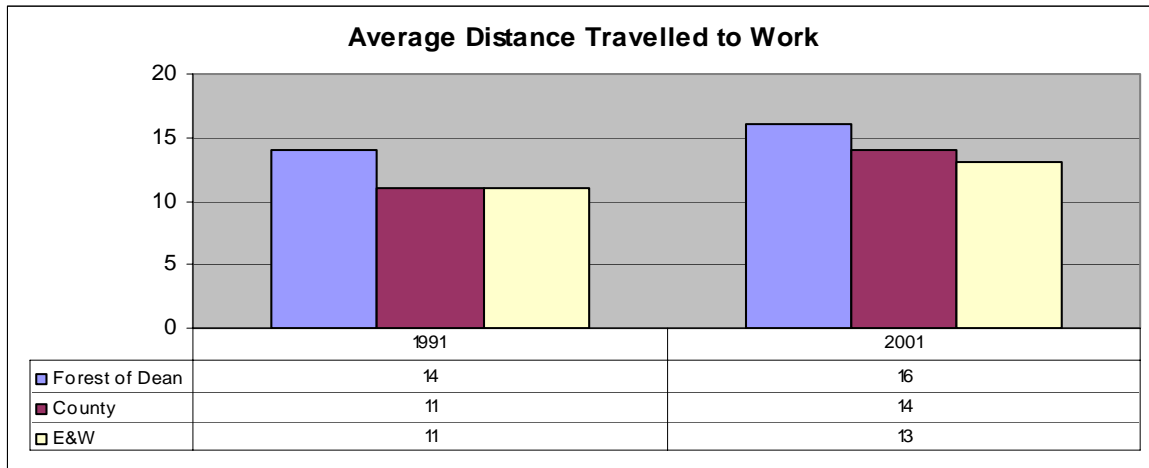
- Travel to work journeys are the main source of transport use and on current trends the working age population of the Forest of Dean would decline from 48,750 in 2001 to 47,150 in 2026.



Source: 2001 Census, Office of National Statistics © Crown Copyright

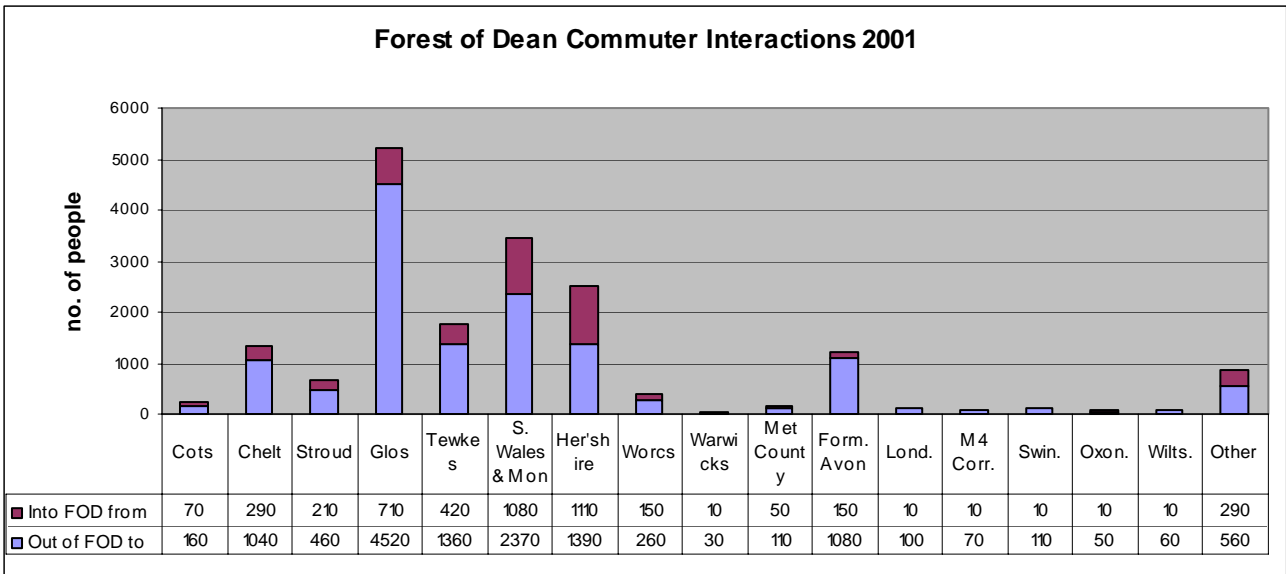
- Relatively few people in the Forest of Dean own no cars at all when compared to the county and national average. To a certain extent this is probably a reflection of the relatively rural nature of the district, with car ownership being fairly essential to get around.
- Similarly, the proportion of people owning 2 or more cars is above the county level and well above the national average.

B. Distance Travelled to Work



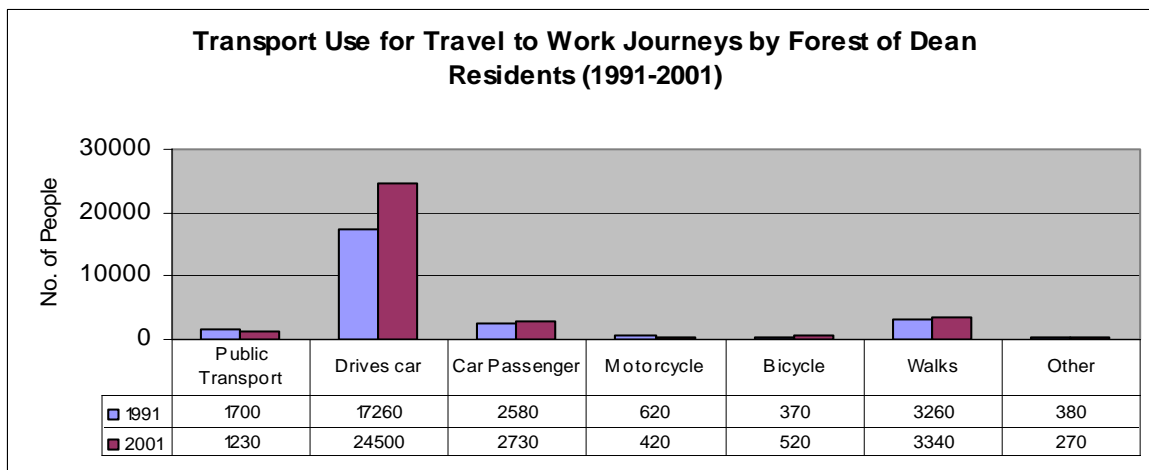
Source: 2001 Census, Office of National Statistics © Crown Copyright

- The average distance travelled to work by Forest of Dean residents increased from 14 kms in 1991 to 16 kms in 2001.
- In 2001 the average distance travelled for Forest of Dean residents was above both the county and national average.
- A major factor in these changes was a trend towards longer journeys to work at the expense of local (< 2km) journeys. However, this wasn't as pronounced in the Forest of Dean as in the county and nation as a whole – perhaps because there have been high levels of out-commuting from the district for some time.



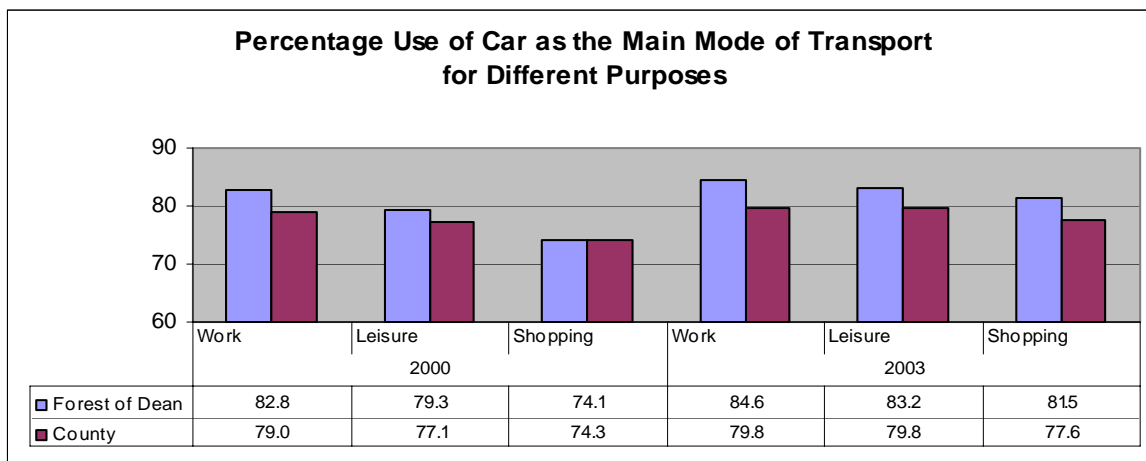
Source: 2001 Census, Office of National Statistics © Crown Copyright. Graph taken from "2001 Census Origin & Destination Analysis 2: Gloucester Travel to Work Report, Gloucestershire CC Research Team (link: <http://www.gloucestershire.gov.uk/Environment/Glin/reportsarchive.htm>)

- Travel to work journeys in the Forest of Dean are characterised by high levels of out-commuting and relatively low levels of in-commuting. Around 13,500 district residents travel out of the area to work while only 3500 people travel in (producing a total net travel to work outflow of around 9000 people). Around 63% (23,800) of Forest of Dean residents also work in the district, with 4550 working from home.
- The Gloucester City District is by far the highest single destination of Forest of Dean out-commuters, while S. Wales, Monmouthshire and Herefordshire are the main origin of in-commuters.



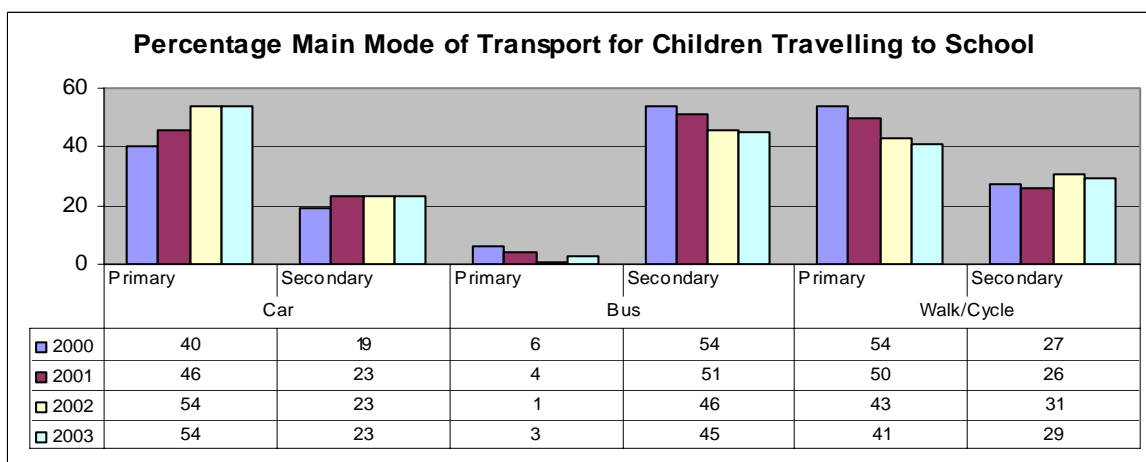
Source: 1991 and 2001 Census, Office of National Statistics © Crown Copyright.

- Although the working age population of the Forest of Dean increased between 1991 and 2001, the affects of mode of transport on travel to work journeys were varied.
- For example, the number of people using public transport actually declined over this period while car driving increased considerably.



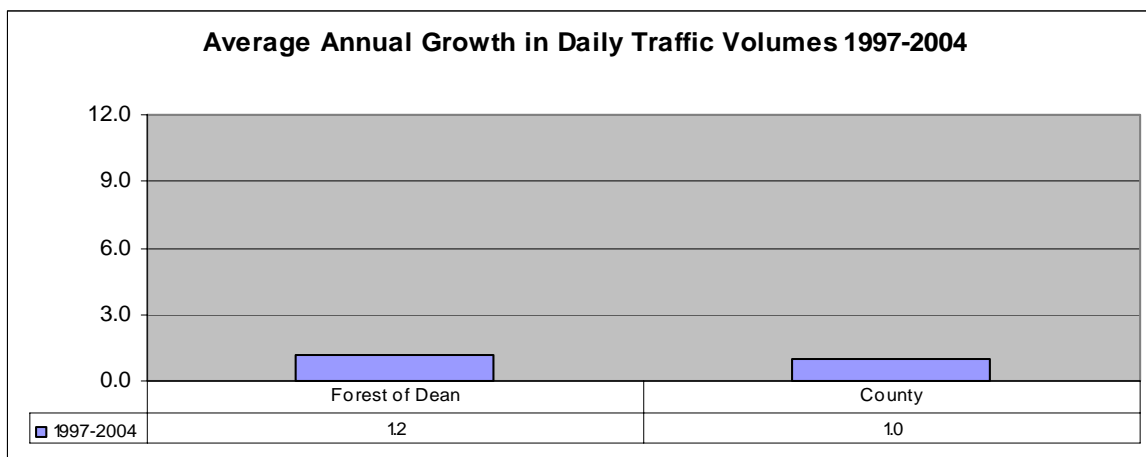
Source: Audit Commission Quality of Life Indicator (36), provided by Transport Planning Unit, Gloucestershire County Council

- Car use for work, leisure and shopping purposes all increased in the Forest of Dean between 2000 and 2003.
- In all cases the 2003 level of car use was higher than the county average.



Source: Audit Commission Quality of Life Indicator (37), provided by Transport Planning Unit, Gloucestershire County Council

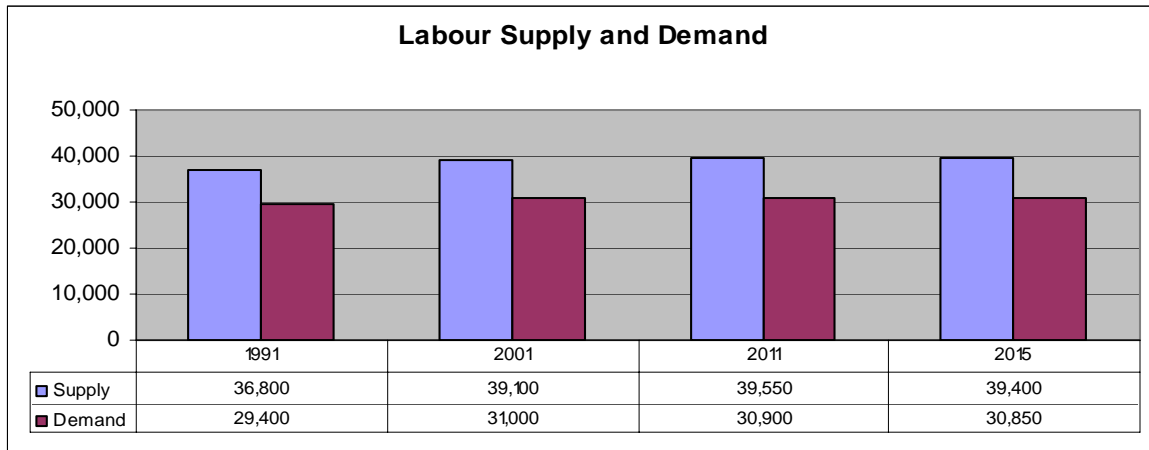
- Car use for taking pupils to school increased in the district between 2000 and 2003, especially for primary school children.
- The proportion of primary school children walking or cycling to school fell considerably over this period, while it remained fairly consistent for secondary pupils.
- Bus use declined for both primary and secondary pupils.



Source: Glos. Local Transport Plan, 3rd Annual Progress Report

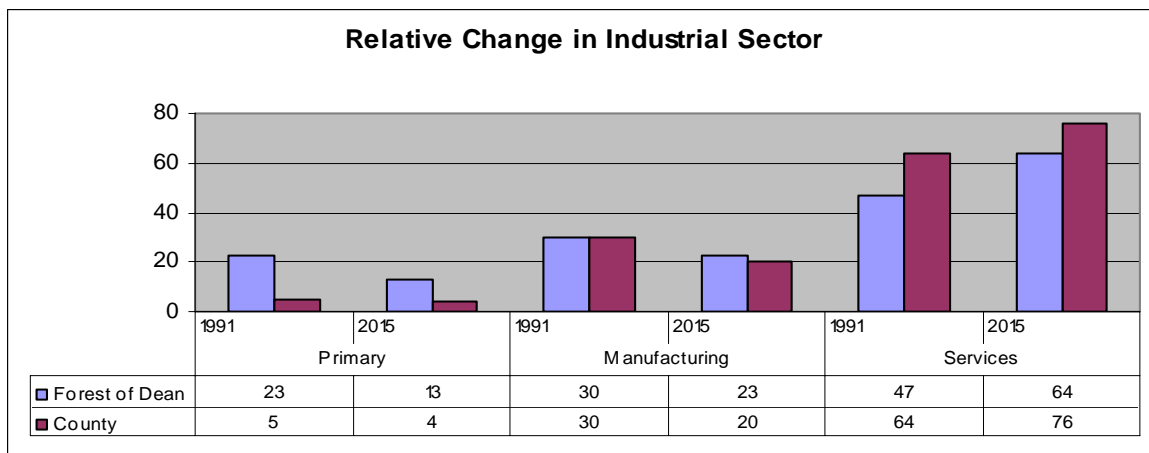
- Traffic volumes in the Forest of Dean grew at a higher rate than the county average between 1997 and 2004.

5. SUPPORT AND ENCOURAGE A THRIVING LOCAL ECONOMY



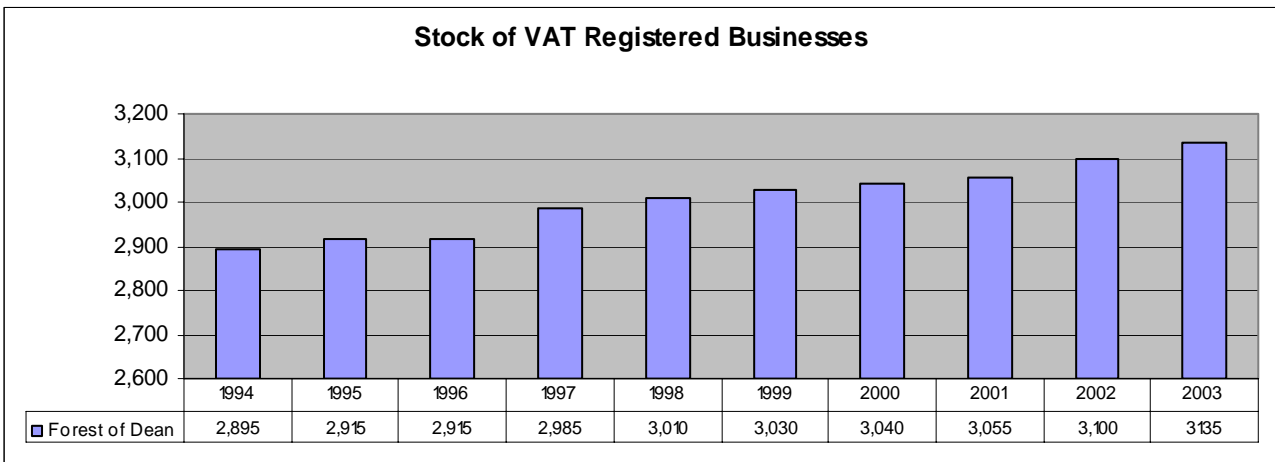
Source: Supply: Gloucestershire Trend Based Projections produced by Research Team, Environment Directorate, Gloucestershire County Council (2005). Demand: Local Economy Forecasting Model (LEFM) provided by Gloucestershire Labour Market Information Unit (last run in 2004 using 2001 data).

- The supply of labour available through the local resident population consistently exceeded labour demand from the local economy between 1991 and 2001, and on current projections this “employment gap” would become more pronounced in the future.



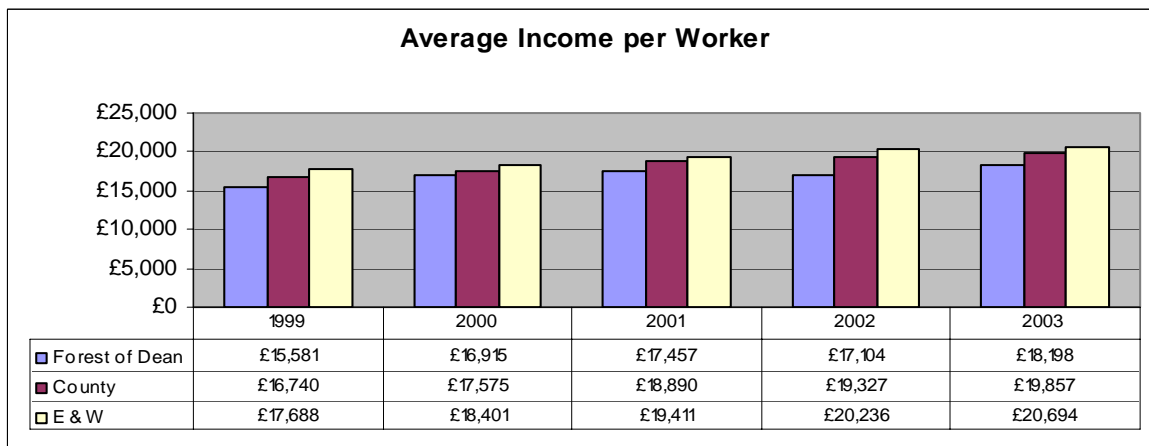
Source: Local Economy Forecasting Model (LEFM) provided by Gloucestershire Labour Market Information Unit (last run in 2004 using 2001 data).

- While service industries are the largest single sector in the Forest of Dean’s economy, primary industries and manufacturing do have a very strong presence (especially when compared to other districts in the county).
- Over the next ten years the economy is expected to continue moving away from these more “traditional” industries towards further service sector expansion. However, by 2015 the Forest of Dean would still have a smaller service sector and higher reliance on manufacturing/ primary industries than the county average.



Source: VAT Registrations and Stocks/De-registrations by Industry (NOMIS). ONS Crown Copyright Reserved. Provided by Gloucestershire Labour Market Information Unit

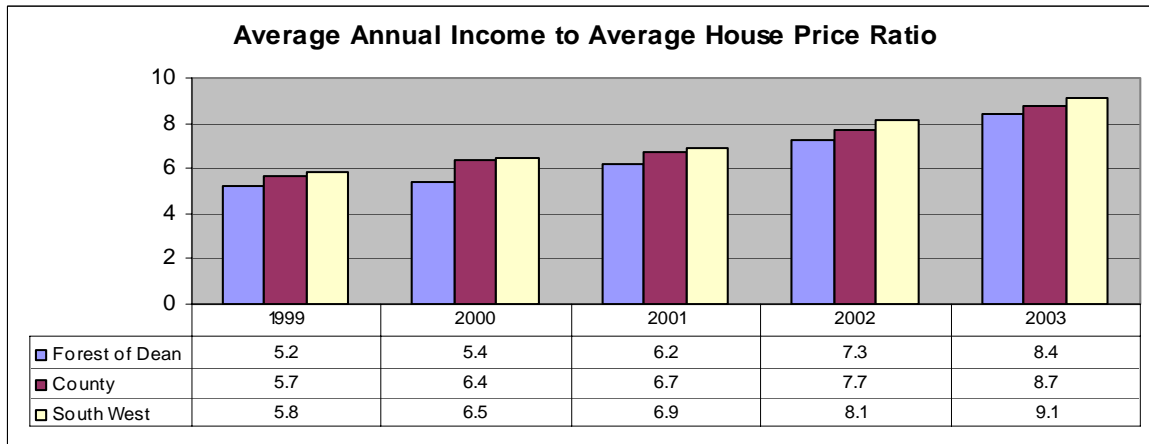
- Between 1994 and 2003 the stock of VAT registered businesses in the district increased by just over 8%.
- This can be compared to growth of 11.5% in the county and 12.15% for England & Wales.



Source: New Earnings Survey: workplace based statistics by SOC 2000 occupation (NOMIS). ONS Crown Copyright Reserved. Provided by Gloucestershire Labour Market Information Unit

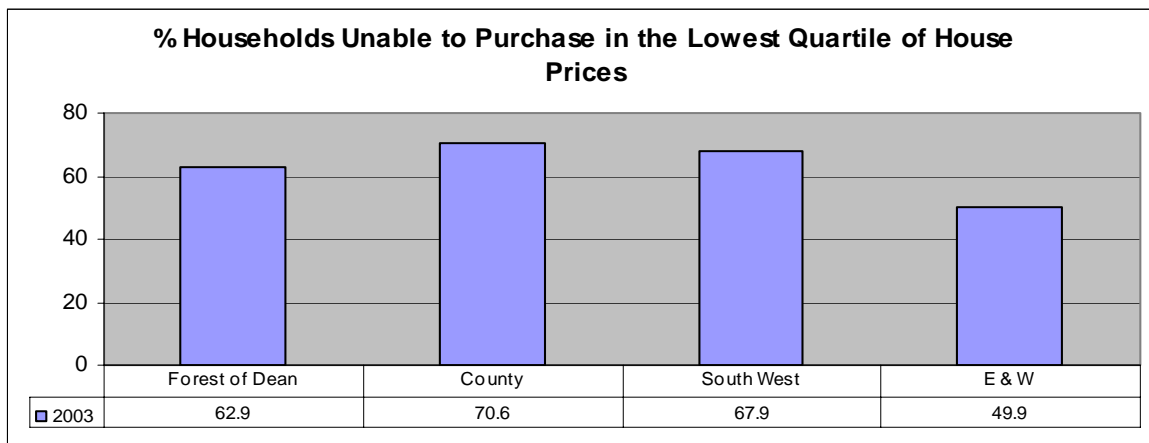
- The average income in the Forest of Dean was well below both the county and national averages and in 2004 was the lowest of any district in the county.
- This may be a reflection of the heavy presence of primary and manufacturing industries in the local economy and the relatively low rates of pay associated with these sectors.

B. Affordable Housing



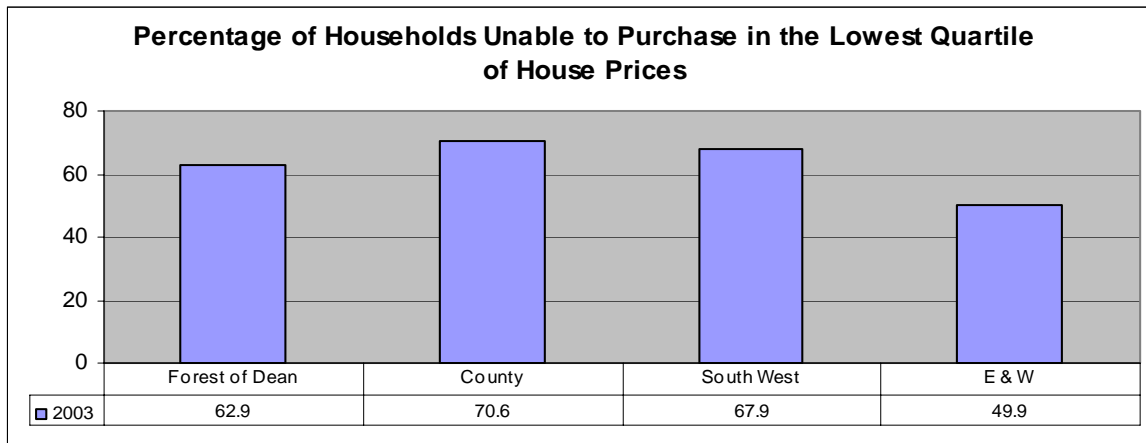
Source: New Earnings Survey: workplace based statistics by SOC 2000 occupation (NOMIS). ONS Crown Copyright Reserved. Land Registry: Land Registry Property Prices. Crown Copyright. Provided by Gloucestershire Labour Market Information Unit

- Affordable housing is an issue across the county and the Forest of Dean is no exception.
- In 2003 the average house price in the Forest of Dean was 8.4 times the gross average annual wage of a local worker. This is comparable to the county as a whole but below the regional level.



Source: "Can work- Cant buy", Steve Wilcox, Joseph Rowntree Foundation, 2003

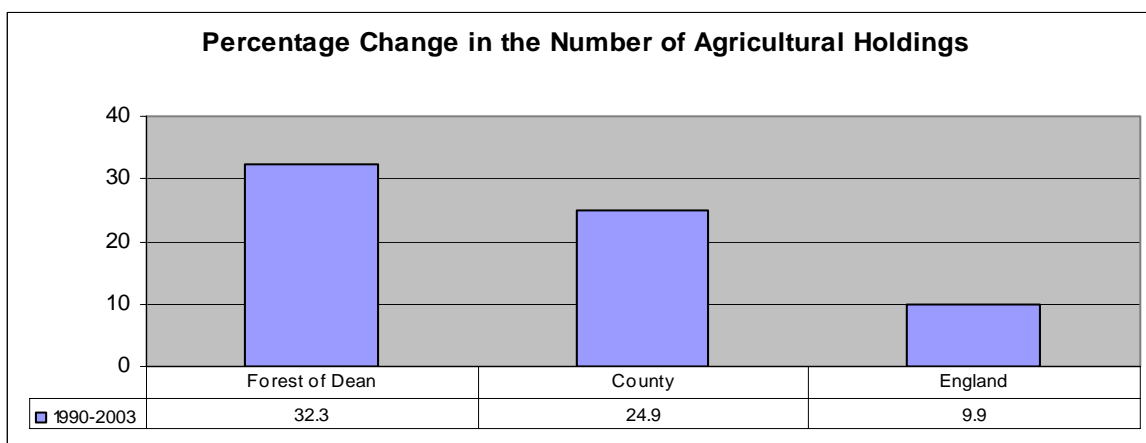
- The Forest of Dean has one of the lowest percentages of households unable to buy a house in the lowest quartile of house prices when compared among districts. Despite this percentage being lower than the county as a whole it is still well above that of England and Wales.



Source: "Can work- Cant buy", Steve Wilcox, Joseph Rowntree Foundation, 2003

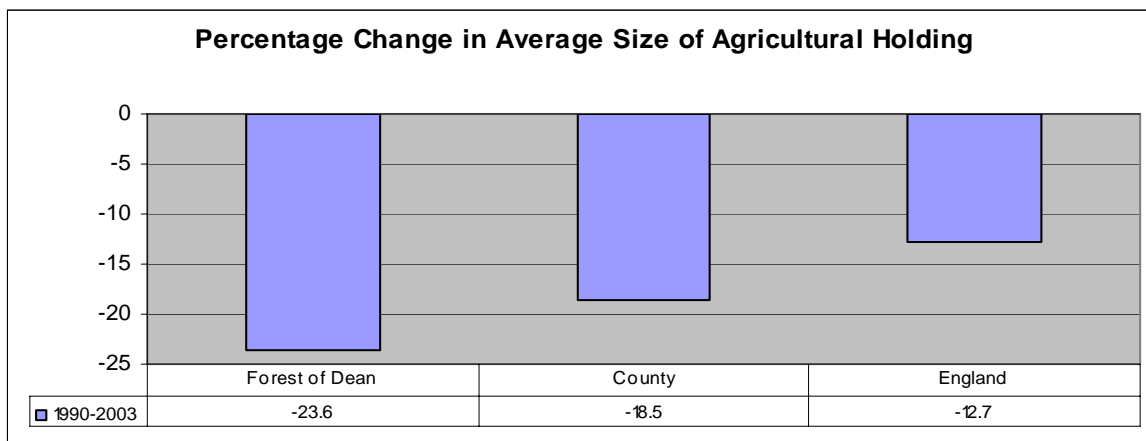
- The inability of key workers to purchase in an area is increasingly being seen as a cause of skill shortages. This chart shows the average case based on 4 key worker incomes (nurse, police, teacher and social worker).
- Key Workers in the Forest of Dean are more likely to be able to purchase a house in the lowest price quartile than their colleagues in the county and South West region as a whole, but they are still worse off than when the England & Wales average is considered.

C. Agriculture



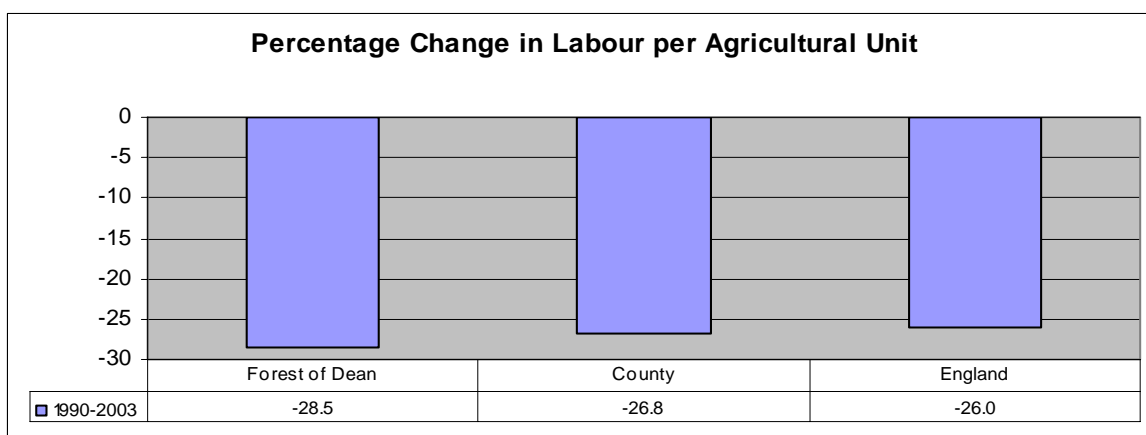
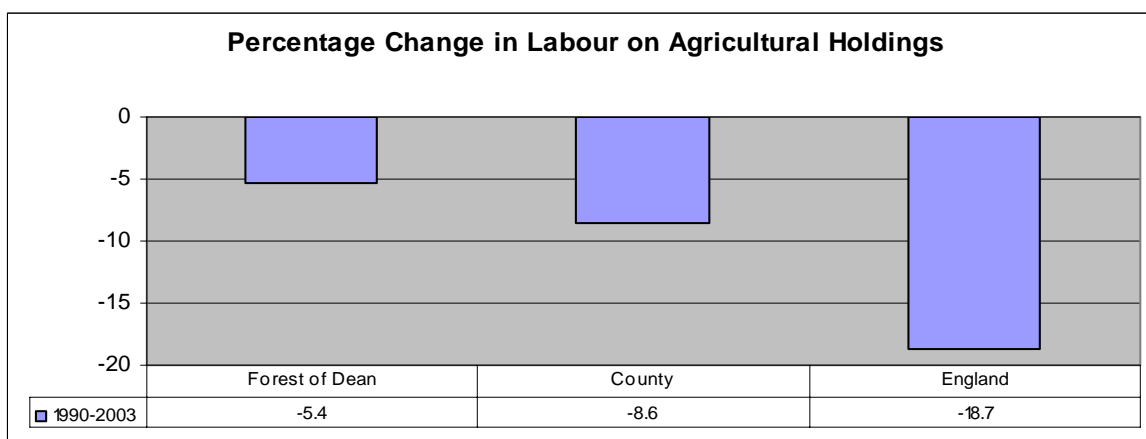
Source: Census of Agriculture, DEFRA, 2003, <http://www.defra.gov.uk>

- There was a larger increase in the number of agricultural holdings in the Forest of Dean between 1990 and 2003 than the county and England as a whole.
- It should be noted however that overall numbers are relatively small.



Source: Census of Agriculture, DEFRA, 2003, <http://www.defra.gov.uk>

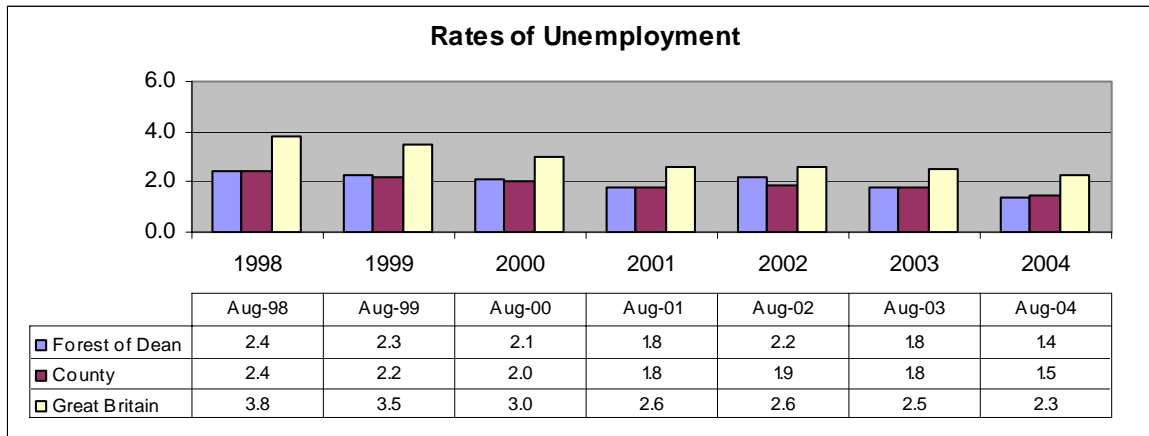
- While the number of holdings increased, they became smaller in size. This dual effect follows a general trend for farms to diversify as traditional agriculture has become increasingly uneconomic.



Source: Census of Agriculture, DEFRA, 2003, <http://www.defra.gov.uk>

- The decrease in agricultural labour was less acute in the Forest of Dean than the county or national decline between 1990 and 2003.
- However, this difference is much less prominent when considering labour per unit.

Unemployment

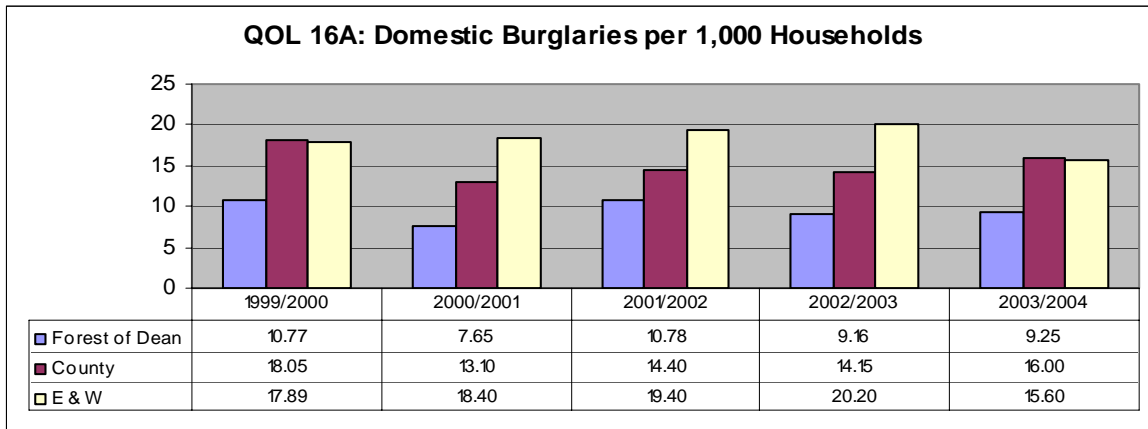


Source: Nomis 2005, provided by Gloucestershire Labour Market Information Unit

- Unemployment rates in the Forest of Dean have tended to follow the county average since 1998 and both remain well below the national level.

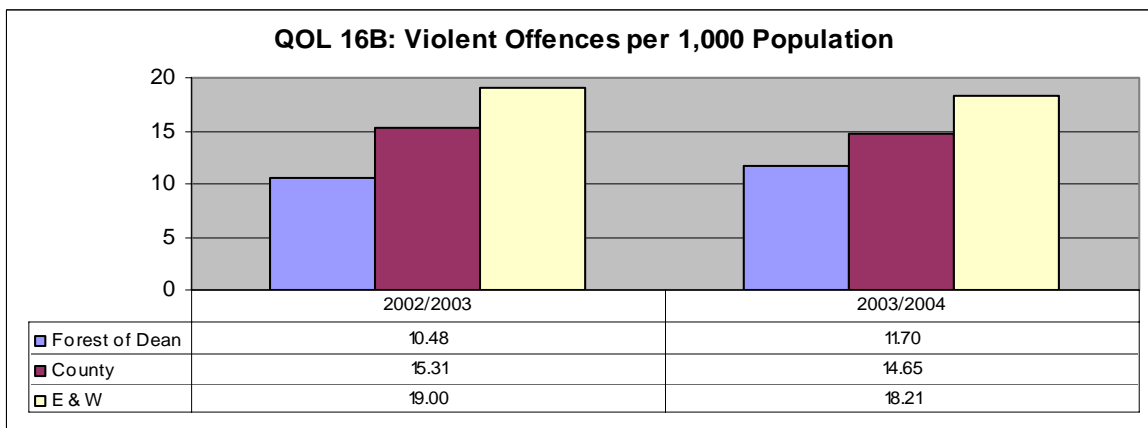
6. PROMOTE SAFER COMMUNITIES

A. Key Crimes



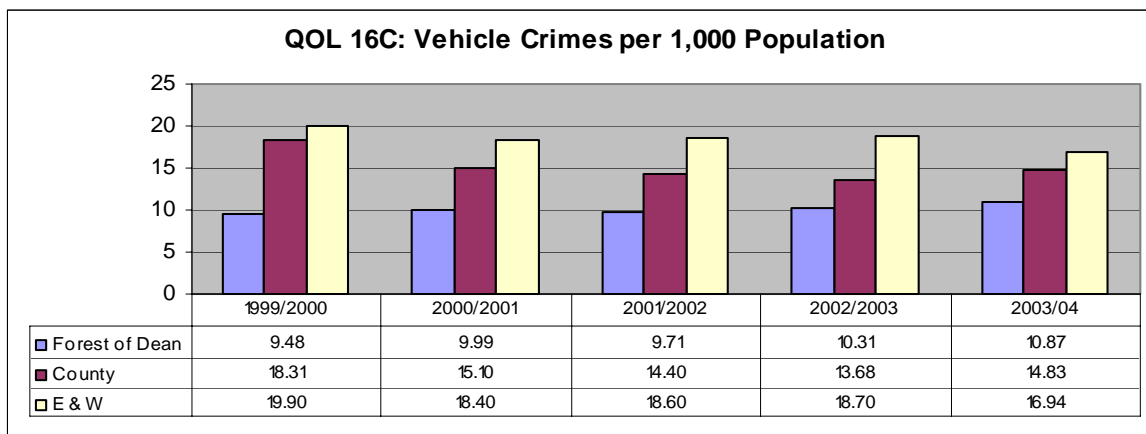
Source: Audit Commission Quality of Life Indicator (16), Crime in England & Wales Report (Home Office Police Authority BVPI's) provided by MAIDeN

- Domestic burglaries in the Forest of Dean have remained well below the county and national averages since 1999.



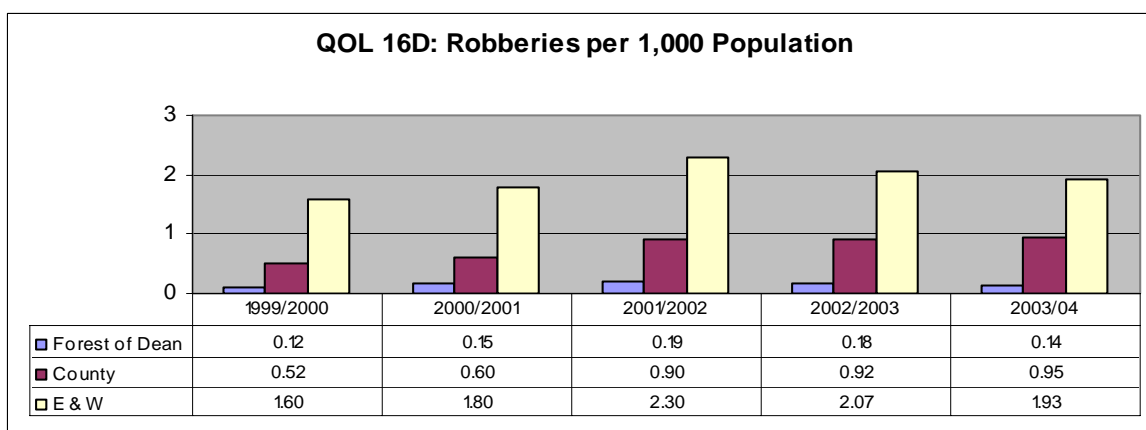
Source: Audit Commission Quality of Life Indicator (16), Crime in England & Wales Report (Home Office Police Authority BVPI's) provided by MAIDeN

- Violent offences were much lower in the Forest of Dean than the county and national averages.
- Due to changes in this data set it is only possible to establish a trend since 2002.



Source: Audit Commission Quality of Life Indicator (16), Crime in England & Wales Report (Home Office Police Authority BVPI's) provided by MAIDeN

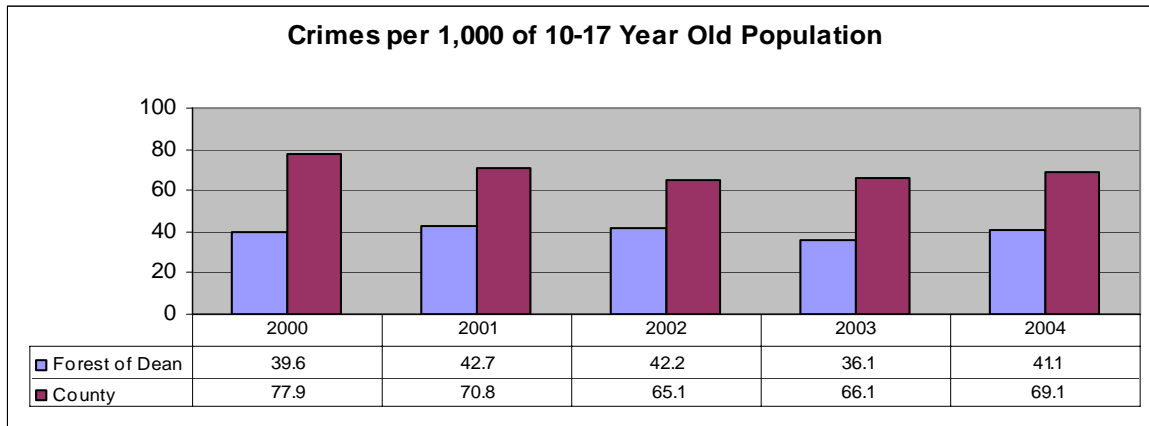
- Vehicle crimes in the district are also well below county and national levels, but the latter have seen declines since 1999 while they have remained relatively stable in the Forest of Dean.



Source: Audit Commission Quality of Life Indicator (16), Crime in England & Wales Report (Home Office Police Authority BVPI's) provided by MAIDeN

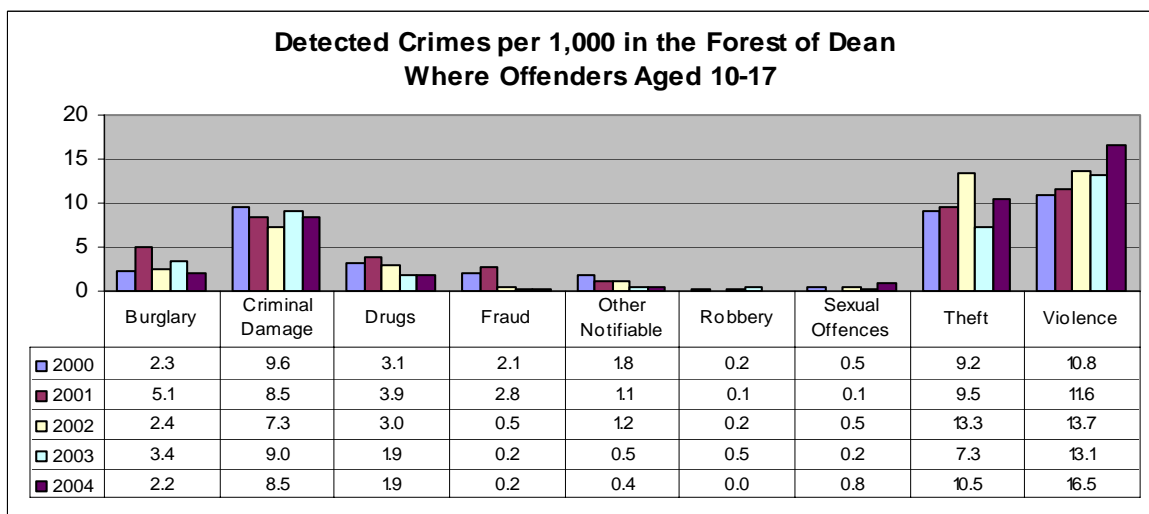
- Robbery rates in the Forest of Dean have been consistently below the county and national averages since 1999.

B. Young Offenders



Source: Performance Monitoring & Analysis Team, Gloucestershire Constabulary. 2004 data based on population projections.

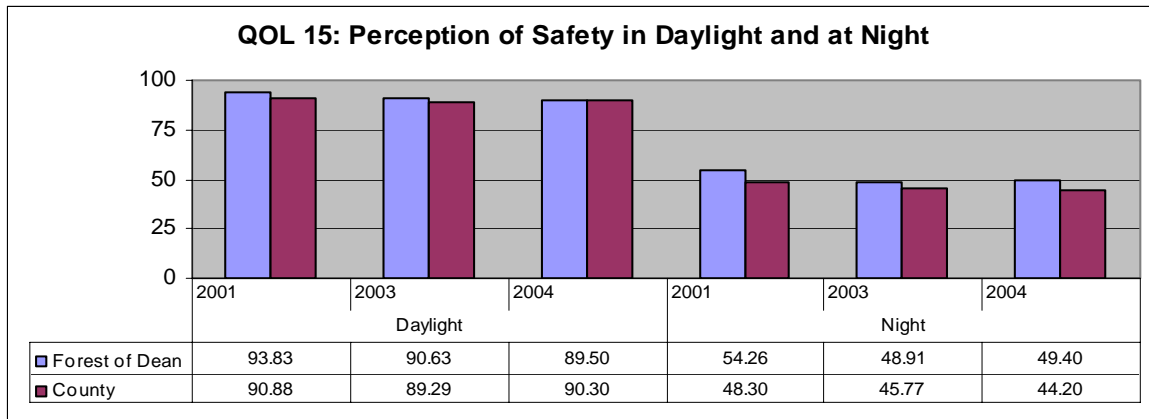
- Crime among the Forest of Dean's 10-17 year olds was the second lowest in the county in 2004 (after the Cotswolds).
- The 2004 rate of 41.1/ 1000 equates to 343 crimes in the district.



Source: Performance Monitoring & Analysis Team, Gloucestershire Constabulary. 2004 data based on population projections.

- As with most other districts, the most common offences for the Forest of Dean's 10-17 year olds are theft, violence and criminal damage.
- It should be noted that Violence appears to be on an upward trend, although given the small numbers involved this conclusion should be treated with caution and it still remains one of the lowest rates in the county.

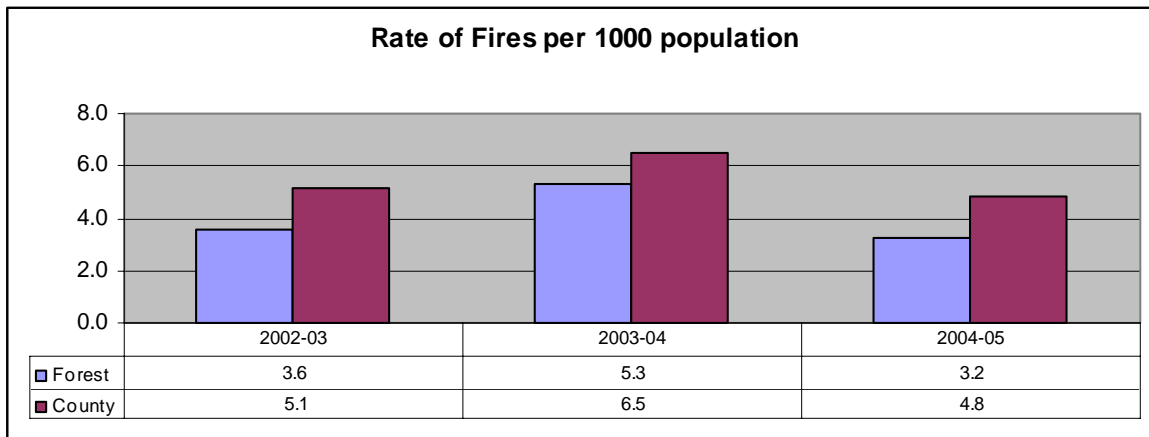
C. Fear of Crime



Source: Gloucestershire Community Safety Partnership Perception of Crime Surveys 2001, provided by MAIDeN 2003. Quality of Life Indicator 15B.

- Around 90% of Forest of Dean residents report feeling safe in their neighbourhood in daylight – a similar figure to the county average.
- Feelings of safety at night were higher than the county average in 2004.

D. Fire



Source: Gloucestershire Fire Service, provided by MAIDeN Arson Analyst. Series includes primary and secondary fires (excluding chimney fires and false alarms). 2004 rate uses GCC population projections.

- The rate of primary and secondary fires⁵ per 1000 population was lower in the Forest of Dean than the county as a whole between 2002 and 2004.

⁵ Primary fires include housing, property etc. Secondary fires include rubbish etc.

Appendix A: Useful Links & Further Information

Useful Links

Gloucestershire County Council “Facts & Figures” website can be accessed through GCC homepage (About Gloucestershire => Facts & Figures Menu):

<http://www.gloucestershire.gov.uk/index.cfm?articleid=140>

Multi-Agency Information Database for Neighbourhoods (MAIDeN):

<http://www.maiden.gov.uk/>

Gloucestershire Labour Market Information Unit (GLMIU):

<http://www.glmiau.co.uk/>

Gloucestershire Local Information Network (GLIN):

<http://www.gloucestershire.gov.uk/Environment/Glin/index.asp>

Office of National Statistics (tip: click on Neighbourhood Statistics on the homepage for local area information):

<http://www.statistics.gov.uk/>

Government Office for the South West (GOSW):

<http://www.gosw.gov.uk/>

Recent publications from the Research Team:

Routine Reports	Date	Website
Gloucestershire & District Population, Labour Force and Household Projections to 2026	Published April 2005	County Council Facts & Figures Page
Gloucestershire, District Ward & Parish Mid-Year Population Estimates	2003	County Council Facts & Figures Page
Gloucestershire Population Monitor (2002)	2004	GLIN
Gloucestershire – Housing Land Availability		County Council Facts & Figures Page
The Quality of Life in Gloucestershire	Published April 2005	GLIN
The Economy of Gloucestershire		GLMIU
The Quarterly Economic Bulletin	Quarterly	GLMIU
Unemployment Bulletin	Monthly	GLMIU

One Off Reports	Date	Website
2001 Census Atlas		County Council Facts & Figures Page
Gloucestershire & District Travel to Work Analysis	Published March 2005	GLIN
Thematic Report: Focusing on Older People	Published November 2004	County Council Facts & Figures Page

Profiles of Neighbourhood Project Areas are also available via the MAIDeN website.

