Research for Tomorrow, Today

Wychavon Migrant Workers Mini Scenarios Report

DATA APPENDIX

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1. WYCHAVON POPULATION IN CONTEXT **4**

WYCHAVON 4
POPULATION CHARACTERISTICS 4
POPULATION FORECASTS 7
School age children *11*
COMMUTING PATTERNS – 1991-2001 15
DEPRIVATION IN THE WEST MIDLANDS 15

2. MIGRANT POPULATION IN CONTEXT **17**

MIGRATION OF NON-BRITISH CITIZENS 17
NUMBERS OF MIGRANT WORKERS 19
NUMBER OF APPROVED APPLICATIONS 21
REGISTERED WORKERS 22
APPROVED APPLICATIONS IN WORCESTERSHIRE DISTRICTS 23
SECTORS WHERE REGISTERED WORKERS ARE EMPLOYED 25
AGE OF MIGRANTS 30
PLANS FOR STAYING 33
MIGRANTS WITH DEPENDANTS 35
CLAIMING BENEFITS 37

3. WYCHAVON LOCAL ECONOMY AND EMPLOYMENT **39**

NUMBER OF BUSINESSES 40
VAT REGISTRATIONS 41
UNEMPLOYMENT TRENDS 43
MIGRANTS AND EMPLOYMENT 44

4. LOCAL HOUSING PROFILE AND TRENDS **45**

HOUSING GROWTH 45
SOCIAL HOUSING STOCK 47
AFFORDABLE HOUSING 48
MIGRANTS BY TENURE 51
HOUSE PRICE TRENDS 52
West Midlands *53*
Worcestershire *55*
Droitwich *56*
Evesham *57*
Pershore *58*
Worcester *59*
Postcode: B96 (Redditch area) *61*
Postcode: WR11 (Evesham area) *62*
Postcode: WR9 (Droitwich area) *63*
Postcode: GL20 (Tewkesbury area) *64*
Postcode: DY10 (Kidderminster area) *66*
Postcode: WR10 (Pershore area) *68*
CURRENT HOUSING BUILD 69

5. HEALTH PROFILE BASICS **70**

6. A8 ECONOMIES BASIC DATA **72**

GDP 72
UNEMPLOYMENT RATES 73
EXCHANGE RATES 74
Poland *74*
Slovakia *75*
SKILLS SHORTAGES IN OTHER EU COUNTRIES 75

7. LOCAL INTERVIEWS: KEY THEMES, ISSUES AND IMPACTS 76

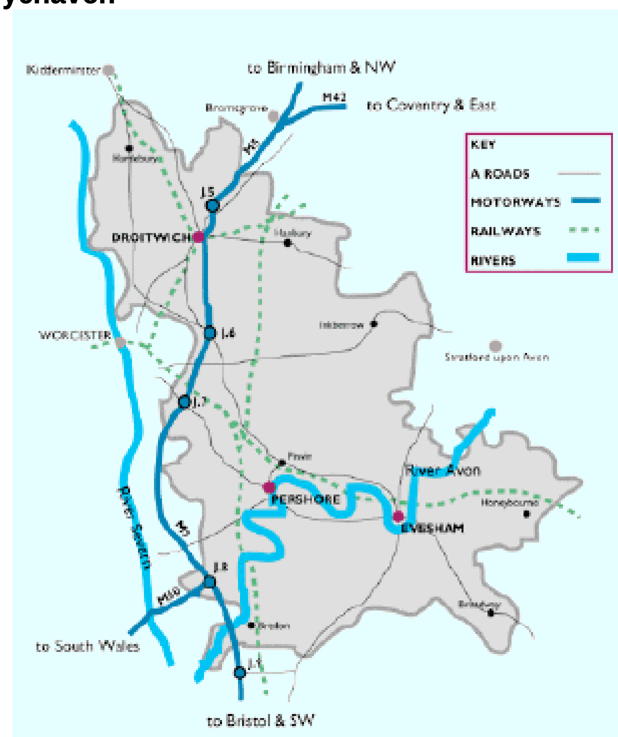
BACKGROUND 76
WHOM WE SPOKE WITH 76
A sincere thank you 77
IMPORTANCE OF MIGRANT WORKERS IN THE LOCAL ECONOMY 77
Local impacts 78
Why do they use migrant workers? 78
How do they find migrant workers? 79
IMPACT IF MIGRANT WORKERS RETURNED HOME 80
What might cause migrant workers to return home? 82
Some are definitely staying 83
RECOMMENDATIONS TO PEOPLE TODAY, FROM 10 YEARS OUT? 83
ISSUES / UNCERTAINTIES WHICH MAY BE RELEVANT IN MINI SCENARIOS 85
OUTLINE QUESTIONS FOR WYCHAVON INTERVIEWS 86

1. Wychavon population in context

Wychavon

Wychavon is a predominantly a rural area, and forms the largest local government districts within Worcestershire. There are three major towns: Droitwich Spa, Pershore and Evesham. It has a population of around 116,300, of whom 98.8% are white. The main local industries are growers and food distribution, engineering and tourism.

Figure 1: Map of Wychavon



Source: Wychavon District Council: Annual Monitoring Report, December 2006

Population characteristics

Although we recognise that ONS data has its limitations, as it is based on the 2001 Census data, mid-year population estimates are released in August of each year. The following table is based on data from August 2007, which means that an update at the time of writing of this report is imminent. Such information can be found on the following website: www.worcestershire.whub.org.uk

- In 2006 Wychavon formed around 21% of the population of Worcestershire – a similar proportion to that of 2001.
- Since 2001, the population of Wychavon has grown at 2.9%, a higher rate than Worcestershire as a whole (around 2%), and that of the UK (around 0.5%).
- The highest growth within Worcestershire was in Bromsgrove (4.2%).

Table 1: Worcestershire & the Districts - ONS Mid-Year Estimates 2001-06

District	2001	2002	2003	2004	2005	2006	2001-2006 growth
Bromsgrove	87,900	88,800	89,600	90,400	91,000	91,600	4.2%
Malvern Hills	72,200	72,600	73,000	73,500	73,800	73,900	2.4%
Redditch	78,800	78,900	79,000	79,000	79,200	79,500	0.9%
Worcester City	93,400	93,000	93,000	92,700	93,100	93,400	0.0%
Wychavon	*113,000*	*113,600*	*114,300*	*115,00*	*115,700*	*116,300*	*2.9%*
Wyre Forest	96,900	97,100	97,500	97,700	98,000	98,200	1.3%
Worcestershire	542,200	544,00	546,300	548,300	550,800	552,900	2.0%

Source: www.worcestershire.whub.org.uk

Mid-year estimates between 2001-06 for Wychavon by age band are shown in the following table.

- The highest growth estimates have been in the 90+ (+28.6%) and the 60 to 64 (+23.4%) age groups.
- The largest fall has been in the 30 to 34 age group (-22.5%).
- No change in the 20 to 24 age groups was recorded.

Table 2: Wychavon - Comparison of ONS Mid-Year Estimates 2001-06 by 5-year Age Bands

Age Band	mid-2001	mid-2002	mid-2003	mid-2004	mid-2005	mid-2006
0	1,100	1,100	1,200	1,200	1,200	1,200
1 - 4	5,000	4,900	4,800	4,800	4,700	4,800
5 - 9	6,900	6,800	6,800	6,800	6,800	6,600
10 - 14	7,000	7,100	7,100	7,100	7,100	7,200
15 - 19	6,100	6,200	6,300	6,400	6,500	6,600

20 - 24	5,000	4,900	4,900	4,900	4,900	5,000
25 - 29	5,700	5,400	5,100	5,100	5,100	5,100
30 – 34	8,000	7,700	7,500	7,000	6,600	6,200
35 - 39	8,800	9,000	9,000	8,900	8,900	8,700
40 - 44	8,100	8,400	8,700	9,000	9,200	9,300
45 - 49	8,000	7,900	8,000	8,000	8,200	8,400
50 - 54	9,100	8,700	8,400	8,300	8,100	8,000
55 - 59	8,000	8,700	9,100	9,200	9,300	9,200
60 - 64	6,400	6,600	6,800	7,200	7,400	7,900
65 - 69	5,600	5,600	5,700	6,000	6,200	6,300
70 - 74	5,000	5,100	5,100	5,100	5,100	5,200
75 - 79	4,200	4,300	4,300	4,300	4,400	4,400
80 - 84	2,800	2,900	3,100	3,200	3,300	3,300
85 - 89	1,600	1,600	1,500	1,500	1,600	1,800
90+	700	800	800	900	900	900
ALL AGES	113,100	113,600	114,300	115,000	115,700	116,300

Source: www.worcestershire.whub.org.uk

ONS mid-2006 population estimates for Wychavon by 5-year age bands by gender are also recorded.

- Below the age of 18 the population is 24,100; from 18 to 64 the populations is 70,200; and those aged 65+ total 22,000.
- The proportion of males to females is slightly higher for ages up to 29. The proportion of females to males however, is much higher than males for those aged 75+.

Table 3: Wychavon - ONS Mid-2006 Population Estimates by 5-year Age Bands

Age Band	All Persons	Male	Female
0	1,200	600	600
1 - 4	4,800	2,500	2,400
5 - 9	6,600	3,400	3,200
10 - 14	7,200	3,600	3,500
15 - 19	6,600	3,500	3,100

20 - 24	5,000	2,700	2,400
25 - 29	5,100	2,600	2,500
30 - 34	6,200	3,000	3,200
35 - 39	8,700	4,200	4,500
40 - 44	9,300	4,700	4,600
45 - 49	8,400	4,100	4,300
50 - 54	8,000	4,000	4,000
55 - 59	9,200	4,600	4,600
60 - 64	7,900	4,000	3,900
65 - 69	6,300	3,100	3,200
70 - 74	5,200	2,500	2,700
75 - 79	4,400	2,000	2,400
80 - 84	3,300	1,300	2,000
85 - 89	1,800	600	1,200
90+	900	200	700
ALL AGES	116,300	57,300	59,000

Source: www.worcestershire.whub.org.uk

Population forecasts

- Between 2006-2016 the population of Worcestershire is likely to grow by about 1.9% (see Table 4 below).
- Furthermore, between 2006 and 2016 the total population of Wychavon is estimated to grow by around 4.7%, much higher than the county rate of 2.9%. Falls are expected in Bromsgrove and Wyre Forest (2.8% and 3.3% respectively).

Table 4: Worcestershire & the Districts - Population estimates & forecasts, 2006-26

YEAR	2006	2007	2008	2009	2010	2011	2016	2021	2026
Bromsgrove	91,600	91,600	91,600	91,400	91,300	91,300	90,500	89,800	89,000
Malvern Hills	73,900	74,100	74,300	74,500	74,700	75,000	76,100	77,200	78,700
Redditch	79,500	79,900	80,300	80,700	81,100	81,600	83,700	86,100	88,600
Worcester City	93,400	94,200	95,000	95,800	96,500	97,100	100,500	104,200	108,200
Wychavon	*116,300*	*117,000*	*117,600*	*118,100*	*118,600*	*119,200*	*121,800*	*124,200*	*126,700*
Wyre Forest	98,200	98,200	97,900	97,700	97,500	97,300	96,300	95,400	95,000
Worcestershire	552,900	555,000	556,600	558,200	559,800	561,500	568,800	576,900	586,200

Source: www.worcestershire.whub.org.uk

The future trend within Wychavon is estimates a growing, elderly population (65+) and a decreasing number of those of working age (see Table 5).

Table 5: Wychavon - Broad Age group Projection, 2006-26

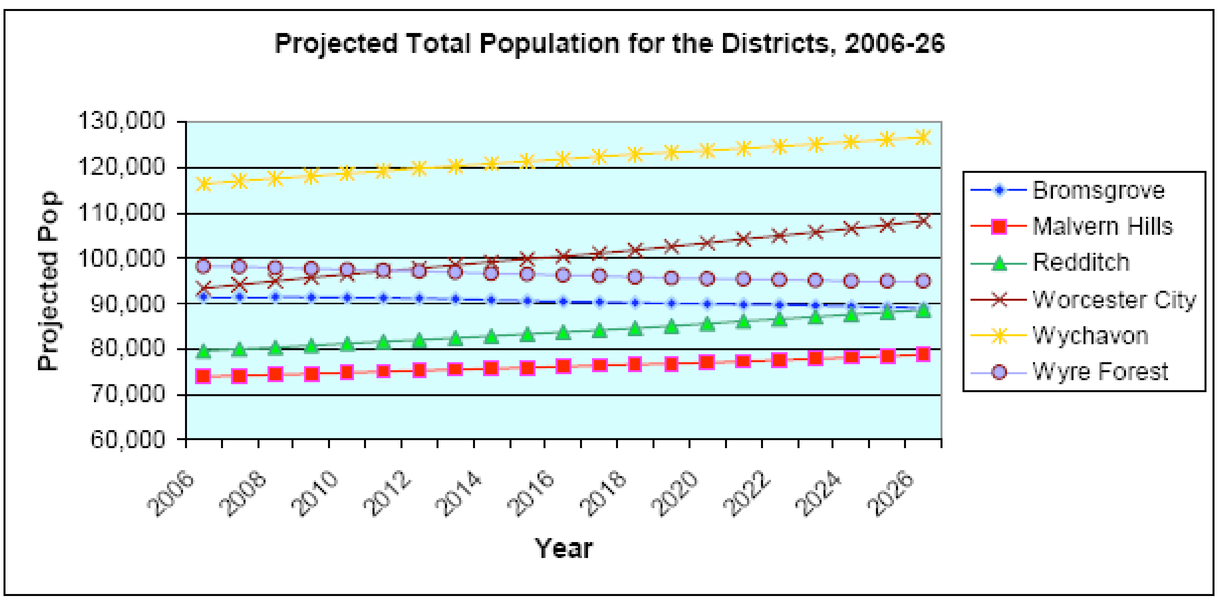
Age Band	2006	2007	2008	2009	2010	2011	2016	2021	2026
0-17	24,100	24,000	24,000	24,000	23,900	23,900	23,600	23,500	23,100
18-64	70,200	70,600	70,600	70,400	70,300	70,000	68,800	68,300	67,800
65+	22,000	22,400	23,000	23,800	24,400	25,300	29,400	32,300	35,700
Total	116,300	117,000	117,600	118,100	118,600	119,200	121,800	124,200	126,700

Source: www.worcestershire.whub.org.uk

The following set of figures show population projections from 2006-26 for the population of Worcestershire by district, and by 18-64 and 65+ age bands.

- The trend for all districts, with the exception of Bromsgrove and Wyre Forest, who are more likely to experience outward migration, will be for a growing population.

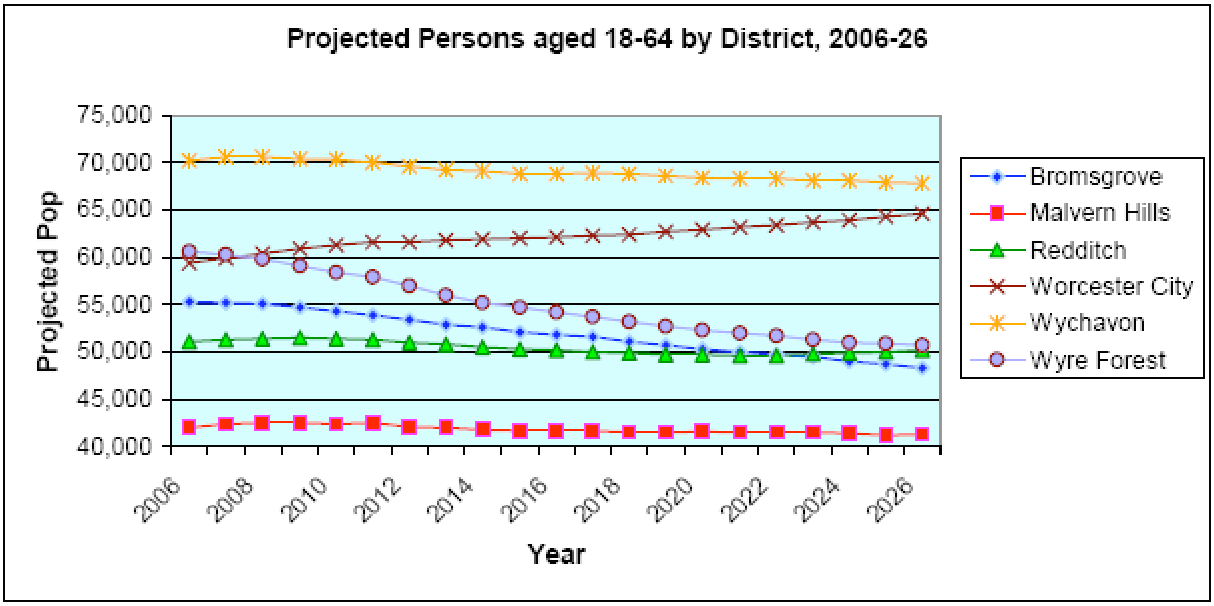
Figure 2: Worcestershire & the Districts - Population estimates & forecasts, 2006-26



Source: www.worcestershire.whub.org.uk

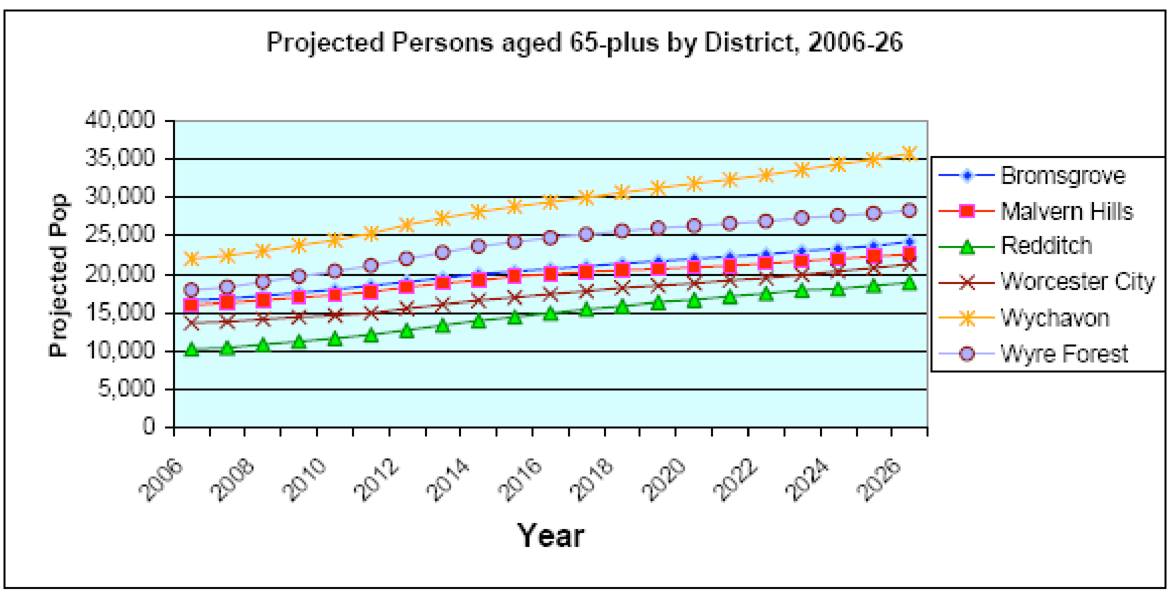
The following figure shows that the projected working population is likely to fall slightly from 70,200 to 68,800 (a 2% drop) within Wychavon between 2006-16, but this is not as dramatic as the anticipated falls in Wyre Forest and Bromsgrove.

Figure 3: Worcestershire & the Districts - Population estimates & forecasts for persons aged 18-64, 2006-26



Source: www.worcestershire.whub.org.uk

Figure 4: Worcestershire & the Districts - Population estimates & forecasts for persons aged 65 plus, 2006-26

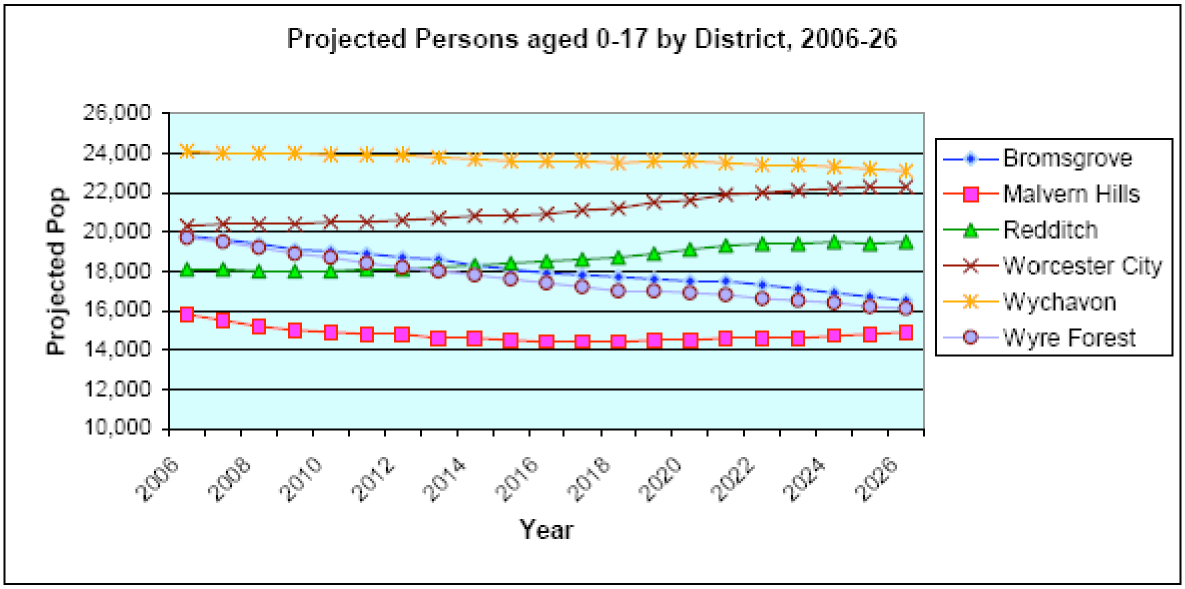


Source: www.worcestershire.whub.org.uk

Wychavon will become an ageing population. The 65+ population is likely to increase significantly between 2006-16 (a 33.6% increase). A similar trend is also likely to be experienced in the other districts, but not as rapid.

The following figure also shows that the numbers aged under 18 are likely to decrease slightly between 2006-16, reinforcing the view that Wychavon is going to be faced with an ever ageing population in the years ahead.

Figure 5: Worcestershire & the Districts - Population estimates & forecasts for persons aged 0-17, 2006-26



Source: www.worcestershire.whub.org.uk

The following table shows the population projections within Wychavon in more detail by 5 year age bands.

- Between 2006 and 2016 the greatest gains are going to be in 65-69 (a 42.9% increase) and 70-74 (40.4% increase) age groups, thus potentially putting extra strain on health and other resources.
- The greatest losses are likely to be in the 35-39 (a 29.9% decrease) and 40-44 (20.4% decrease) age groups.

Table 6: Wychavon Population Projection - Total Population by 5-Year Age bands

Age Band	2006	2007	2008	2009	2010	2011	2016	2021	2026
0-4	6,100	6,100	6,200	6,200	6,200	6,100	5,800	5,700	5,700
5-9	6,600	6,500	6,500	6,500	6,500	6,700	6,800	6,500	6,400
10-14	7,200	7,100	7,100	7,100	7,100	6,900	7,000	7,100	6,900
15-19	6,600	6,900	6,800	6,700	6,700	6,700	6,500	6,600	6,800
20-24	5,000	5,000	5,100	5,100	5,300	5,400	5,500	5,200	5,300
25-29	5,100	5,100	5,100	5,100	5,000	4,900	5,300	5,300	5,100
30-34	6,200	5,800	5,500	5,400	5,400	5,400	5,300	5,800	5,900
35-39	8,700	8,500	8,100	7,700	7,200	6,800	6,100	6,100	6,600
40-44	9,300	9,400	9,400	9,400	9,500	9,300	7,400	6,600	6,700
45-49	8,400	8,800	9,100	9,400	9,600	9,700	9,800	7,800	7,100
50-54	8,000	8,100	8,200	8,200	8,400	8,600	10,000	10,100	8,000
55-59	9,200	8,800	8,500	8,300	8,200	8,100	8,800	10,200	10,300
60-64	7,900	8,600	9,100	9,200	9,300	9,200	8,200	8,900	10,300
65-69	6,300	6,500	6,700	7,000	7,300	7,700	9,000	8,100	8,800
70-74	5,200	5,200	5,400	5,600	5,900	5,900	7,300	8,500	7,700
75-79	4,400	4,400	4,500	4,500	4,500	4,500	5,300	6,500	7,700
80-84	3,300	3,400	3,400	3,400	3,500	3,500	3,700	4,300	5,500
85-89	1,800	1,900	2,100	2,200	2,200	2,300	2,400	2,600	3,200
90+	900	1,000	1,000	1,000	1,200	1,300	1,800	2,200	2,700
Total	116,300	117,000	117,600	118,100	118,600	119,200	121,800	124,200	126,700

Source: www.worcestershire.whub.org.uk

Households / families

School age children

The following figure is based on the information from the School Census Data (formerly known as PLASC). It has not been straightforward to access the School's data, but the following section highlight some of the trends.

- The overall trend is for a declining pupil roll within Worcestershire, with a projected decrease between 2006-10 of 3.9%
- There is a projected increase, however, of around 6.5% for those in the 4+ age group within the county as a whole.

Figure 6: Worcestershire - School roll data & forecasts

COUNTYWIDE DEMOGRAPHIC INFORMATION

Table 1 Takes the January numbers on rolls in schools to illustrate the trends over the last four years. The age is at the previous 31st August.

Table 2 Shows the percentages of each age group transferring from one year to the next. For example, in 2002 there were 6146 pupils aged 5. By 2003, these pupils, now aged 6, had increased to 6151. This implies a transfer rate of 100.1%.
The three year average is the percentage used in the Forecasts in Table 3.

Table 3 Gives an estimate of the intake at 4+ (from known children data) and number of children transfering from one age cohort to the next, based on transfer rates in Table 2. For example, the estimated percentage transfer from age 9 to age 10 is 100.3%.
Thus, the 6083 pupils aged 9 in 2005 are estimated to increase by 0.3% to 6103 in 2006.
The exception is sixth form staying on rates where trend figures have been used.

Table 1: Data for the last 4 years

January	4+	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Total
2002	6153	6146	6101	6219	6206	6484	6562	6706	6570	6408	6117	6057	2175	1657	95	79656
2003	6053	6189	6151	6117	6189	6182	6505	6613	6699	6565	6425	6087	2168	1693	90	79726
2004	5889	6045	6205	6147	6124	6149	6195	6570	6597	6692	6550	6384	2242	1730	96	79615
2005	5706	5902	6080	6211	6153	6083	6179	6292	6583	6606	6694	6494	2417	1814	84	79298
2006	5590	5777	5931	6080	6211	6125	6109	6209	6290	6600	6581	6609	2358	1930	105	78505

Table 2: Year on year transfer rates (for example 8/7 is the percentage of 8 year olds to the previous year's 7 year olds).

January	4+/KC	5/4+	6/5	7/6	8/7	9/8	10/9	11/10	12/11	13/12	14/13	15/14	16/15	17/16	18/17
2003	95.3	100.6	100.1	100.3	99.5	99.6	100.3	100.8	99.9	99.9	100.3	99.5	35.8	77.8	5.4
2004	90.4	99.9	100.3	99.9	100.1	99.4	100.2	101	99.8	99.9	99.8	99.4	36.8	79.8	5.7
2005	91	100.2	100.6	100.1	100.1	99.3	100.5	101.6	100.2	100.1	100	99.1	37.9	80.9	4.9
2006	93.3	101.2	100.5	100	100	99.5	100.4	100.5	100	100.3	99.6	98.7	36.3	79.9	5.8
3 year average	91.6	100.4	100.5	100	100.1	99.4	100.4	101.0	100.0	100.1	99.8	99.1	37.0	80.2	5.5
% used in forecast	91.6	100.4	100.5	100	100.1	99.4	100.4	101.0	100.0	100.1	99.8	99.1	37.0	80.2	5.5

4+/KC is the percentage of known children entering our schools

Table 3: Forecasts for next four years

January	4+	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Total
2007	5155	5614	5804	5931	6084	6174	6147	6172	6209	6296	6587	6520	2445	1891	106	77135
2008	5282	5177	5640	5804	5935	6047	6197	6211	6172	6215	6283	6526	2412	1961	103	75965
2009	5463	5305	5201	5640	5808	5899	6069	6261	6211	6178	6203	6224	2415	1934	107	74918
2010	5481	5487	5330	5201	5644	5773	5921	6132	6261	6217	6166	6145	2303	1937	106	74104

The County picture is one of a slightly declining roll as smaller year groups come through from Reception than leave at age 16.

Source: www.worcestershire.whub.org.uk

The following table shows the number of pupils on roll by age within key districts of Wychavon for January 2008.

- The largest proportion of 4 to 7 years olds (33.2%) is in the Droitwich district (21.8% for Evesham; and 29.4% for Pershore districts)

Table 7: Wychavon Districts - Number of pupils on roll by age, January 2008

Number on roll (January 2008)	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Droitwich District	366	311	343	317	346	309	324	319	295	282	280	300	134	99	1	**4026**
Evesham District	527	501	478	555	515	525	566	519	558	532	527	578	283	253	5	**6922**
Pershore District	236	218	248	232	265	261	267	259	256	244	234	250	104	99	8	**3181**

Source: www.worcestershire.whub.org.uk

The following table summarises the characteristics of the districts and likely trends of school numbers.

Figure 7: Wychavon Districts - Characteristics and trends of school numbers

Droitwich

Education follows the three tier system. First and Middle school numbers are expected to increase slightly overall, taking up some of the surplus places. However the experience is likely to vary across the pyramid and falling numbers in rural first schools are a cause for concern. The High School is expected to continue to operate at capacity.

Evesham

There is a three tier system of education. Within Evesham itself significant housing growth will counteract the effect of declining rolls in recent years, thus maintaining numbers in schools in the town. In the rural area school numbers will continue to fall; this will be a cause for concern in some village schools.

Pershore

There is a three tier system of education. Some of the first schools have significant levels of surplus places, a problem which will be exacerbated by continued falling rolls. Declines in pupil numbers will start to affect the middle schools but the high school is expected to continue operating at or near capacity.

Worcester

Numbers in both primary and secondary phases are expected to decline in the short term. However, post 2011 housing development in Worcestershire is likely to be concentrated in and around Worcester.

Source: www.worcestershire.whub.org.uk

There are an increasing number of children attending schools in Wychavon whose first language is not English, and where the migrant population is fairly concentrated there has been a recent trend to open nationally specific schools in the county. This also provides an indicator that migrants with dependants are likely to settle within the area for period of time and educate their children locally.

The Polish have been pro-active in this area and Figure 8 shows an extract from the Worcester News.

Figure 8: Worcester - Opening of Polish Saturday schools

WORCESTER's first Polish school has been hailed a great success at the end of its inaugural term.

John Paul II Polish Saturday School opened its doors to 17 of the city's Polish children in March 2008 but by the end of the summer term 43 youngsters were attending, including a number of children for whom Polish is a second language.

There are now five classes of pupils aged between five and 15 and more than 60 children have already signed up to join in September.

Headteacher Monika Wakula said she was thrilled with the success of the school and hoped it was regarded as a welcome addition to the community. "Since March the children have not only taken part in lessons where Polish, geography, history, religion and English is taught, but have entertained family and guests at a number of celebrations," she said.

"The year has clearly been a success. Children are happy to dedicate their Saturdays to further their education, retain their roots and progress integration into the local community.

"We are very much looking forward to next year when there are plans to increase the number of classes and to prepare the oldest class for their GCSE exam in Polish."

The school, currently based at Christopher Whitehead Language College, Bromwich Road, St John's, was set up working in connection with local people and organisations, including south Worcestershire police.

Chief Inspector Helena Bennett, of south Worcestershire police, speaks fluent Polish. She said: "The school is clearly a great achievement by all involved and a valued addition to Worcester's community."

John Paul II Polish Saturday School is the 73rd such school in the UK and is endorsed by the Polish Educational Society based in London.

Sources:
http://www.worcesternews.co.uk/news/3553710.Success_for_city___s_first_Polish_school/

http://www.szkolaworcester.co.uk/english/indexeng.html

Commuting patterns – 1991-2001

While the average distance travelled to work is less than 2km, the numbers travelling 20km or more increased by more than 50% (between 1991 and 2001 census).

Those who work from home, or have no fixed workplace, increased by 30% and Wychavon had the highest proportion of home workers of any district in the county.

Wychavon has the highest net outlow of commuters of any district in the county, with increasing numbers working outside Wychavon.

Deprivation in the West Midlands

The Indices of Deprivation 2007 are measures of deprivation for every Census super output area (SOA) in England. The table below (Table 8) shows the West Midlands' local authorities ranked by the percentage of their LSOAs in the most deprived 10% nationally.

Wychavon is one of the sixteen, along with Malvern Hills and Bromsgrove that has no LSOAs in the 10% most deprived LSOAs in England.

Table 8: West Midlands - Overall Income deprivation performance

Local Authority	Total LSOAs	LSOAs in 10% most deprived in England	% of LSOAs in worst 10% in England
Birmingham	641	254	39.63
Stoke-on-Trent	160	53	33.13
Sandwell	187	55	29.41
Wolverhampton	158	37	23.42
Walsall	169	33	19.53
Coventry	197	33	16.75
Dudley	202	19	9.41
Solihull	133	10	7.52
Nuneaton and Bedworth	82	6	7.32
Telford and Wrekin	108	6	5.56
Worcester	61	3	4.92
Newcastle-under-Lyme	81	3	3.70
Redditch	55	2	3.64
Wyre Forest	65	2	3.08
East Staffordshire	70	2	2.86
Tamworth	50	1	2.00
Cannock Chase	60	1	1.64
Shrewsbury and Atcham	61	1	0.86
Herefordshire, County of	116	0	0.00
Bridgnorth	34	0	0.00
Bromsgrove	57	0	0.00
Lichfield	57	0	0.00
Malvern Hills	45	0	0.00
North Shropshire	40	0	0.00
North Warwickshire	38	0	0.00
Oswestry	29	0	0.00
Rugby	58	0	0.00
South Shropshire	28	0	0.00
South Staffordshire	68	0	0.00
Stafford	80	0	0.00
Staffordshire Moorlands	59	0	0.00
Stratford-on-Avon	71	0	0.00
Warwick	84	0	0.00
Wychavon	78	0	0.00

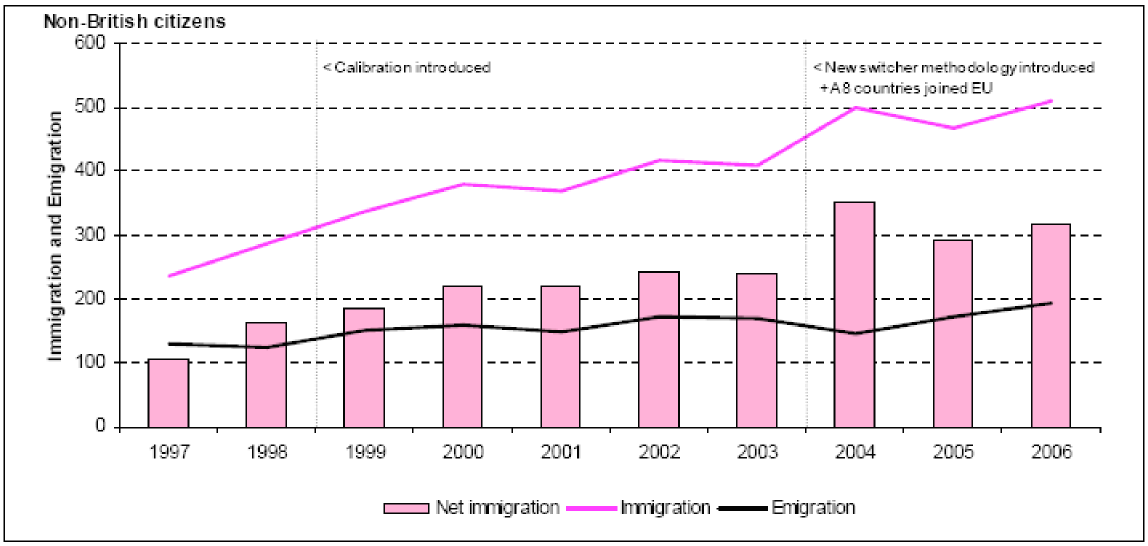
Source: Indices of Deprivation 2007 West Midlands Local Authorities, West Midlands Regional Observatory (2007)

2. Migrant population in context

Migration of non-British citizens

Immigration of non-British citizens has more than doubled since 1997. Emigration of non-British citizens has been considerably lower although there has been an upward trend in recent years. This has resulted in a pattern of high and increasing net inward migration (see Figure 9).

Figure 9: UK – Immigration of non-British citizens, 1997-06

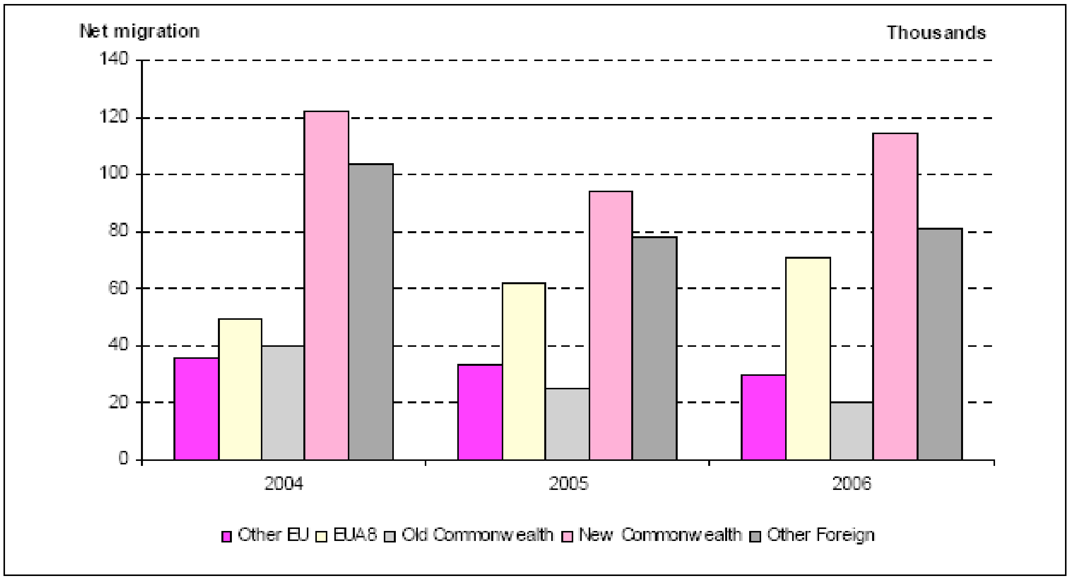


Source: International Migration: ONS (2006)

Between 2005 and 2006, the highest net migration of non-British citizens came from the New Commonwealth and other foreign areas.

- Net migration from the A8 countries increased by 15 per cent, from 61,000 in 2005 to 71,000 in 2006. This is due to more people from these countries entering than leaving the UK (see Figure 10).

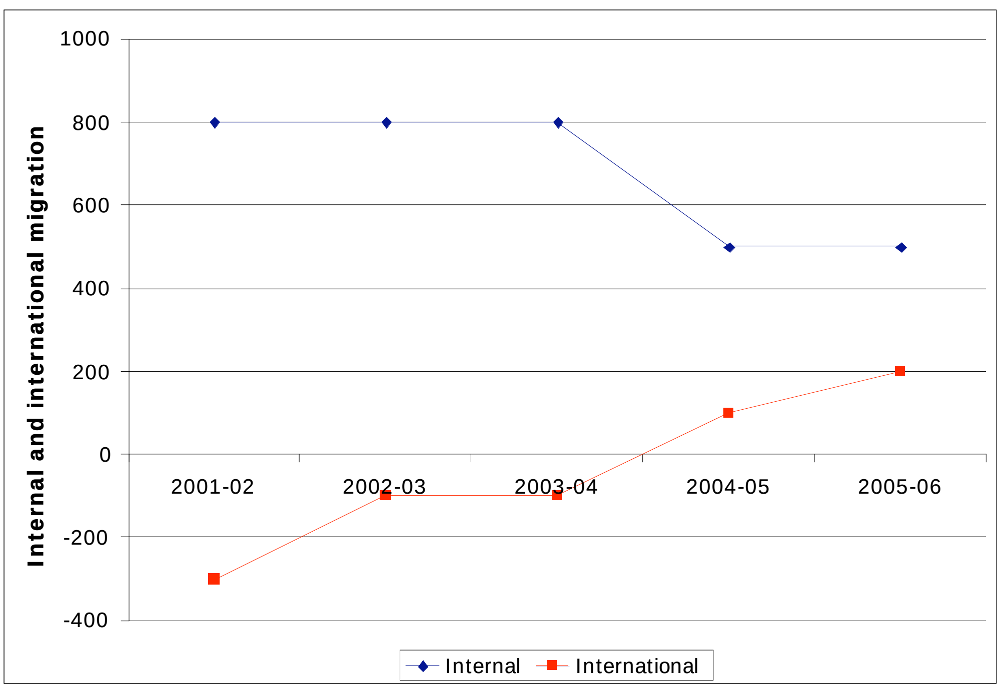
Figure 10: UK - Net migration of non-British citizens, 2004-06



Source: International Migration: ONS (2006)

The following figure shows between 2001 and 2006 that whilst internal migration has been falling, international migration has been increasing within Wychavon. However, the internal migration figure is still higher than the international figure.

Figure 11: Wychavon - Internal and international migration flows within 2001-06



Source: ONS Components of Change 2005-06

Numbers of migrant workers

Whilst there is currently no definitive source for the number of migrant workers, a number of datasets can be used to provide an indication of the scale of immigration into the county. One of these is the National Insurance Number registrations (NINos) with respect of non-UK nationals.

The following table shows the top ten countries for overseas nationals entering the UK and allocated a NINo between 2004 and 2008. The numbers from Poland have increased dramatically, but with a slight fall in 2007-08.

Other A8 countries that feature in the top ten include Slovakia and Lithuania.

Table 9: UK - Overseas Nationals entering the UK and allocated a NINo:Top Ten Countries each Year of Registration

Thousands

2004/05		2005/06		2006/07		2007/08	
Poland	61.12	Poland	171.08	Poland	220.43	Poland	210.66
India	32.47	India	45.93	India	48.82	India	49.76
Pakistan	20.19	Rep of Lithuania	30.94	Slovak Rep	28.60	Slovak Rep	29.99
South Africa	19.19	Slovak Rep	27.51	Pakistan	25.01	Pakistan	24.83
Australia	16.47	South Africa	24.03	Australia	24.21	Australia	24.10
Rep of Lithuania	15.54	Australia	23.83	Rep of Lithuania	23.92	Romania	22.95
France	13.18	Pakistan	22.29	France	20.01	France	21.77
China Peoples Rep	12.55	France	17.23	South Africa	16.80	Rep of Lithuania	19.03
Portugal	12.20	Rep of Latvia	14.40	Germany	15.07	Germany	15.53
Slovak Rep	11.11	Germany	13.39	China Peoples Rep	13.00	Italy	15.40

Source: *100% extract from National Insurance Recording System*

Time Series - Year Of Registration Date *Years are shown as financial year (1April - 31 March).*

Source: National Insurance Number Allocations to Overseas Nationals Entering the UK, DWP (2007)

The following table shows the number of NINo registrations of non-UK nationals between 2002 and 2008 within the districts of Worcestershire.

- In 2006-07, 3,830 non-UK nationals registered for a NINo in Worcestershire. This is 3.3 times the equivalent figure for 2002-03, and 5.8% higher than in 2005-06. This figure fell slightly to 3,570 for 2007-08.
- In total, across England there were slightly over 733,000 registrations in 2007-08, of which 46,630 (6.4%) were made in the West Midlands.
- In 2004-05 the proportion of Polish nationals accounted for 38.9% of total registrations in Wychavon; in 2005-06, this increased to 53.6% in 2005-06; and to 58.3% in 2006-07.

Table 10: Worcestershire - NINo registrations in respect of non-UK Nationals, 2002-03 to 2007-08

Local Authority	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08*
Bromsgrove	90	100	120	180	210	160
Malvern Hills	100	80	190	320	290	260
Redditch	210	210	430	870	880	900
Worcester	440	460	680	920	1,020	970
Wychavon	220	230	540	970	1,030	950
Wyre Forest	110	110	220	360	400	330
Worcestershire	**1,170**	**1,190**	**2,180**	**3,620**	**3,830**	**3,570**

Source: DWP, 2007. National Insurance Recording System [* - rounded to nearest 1,000]

The Worker Registration Scheme (WRS) database is also another source of information [http://www.lgar.local.gov.uk/lgv/core/page.do?pageId=27879] about European migrants and provides detailed data at the local authority level with respect to number of approved applications, age, number of dependants, occupation, nationality and intended length of stay.

In terms of actual numbers, figures for NINos and WRS do vary. The reasons are highlighted below.

Key points regarding NINos are:

- The figures refer to date of registration and not to date of arrival.
- Applicants are not required to surrender their number if they leave employment or the UK.
- Data are recorded according to the address of the applicant rather than the address of the employer.
- Visitors from overseas who are not working or planning to work or claim benefits (including many students) do not require a NINo.
- Unlike WRS, NINo data are available for all overseas nationals.

Key points regarding the WRS are:

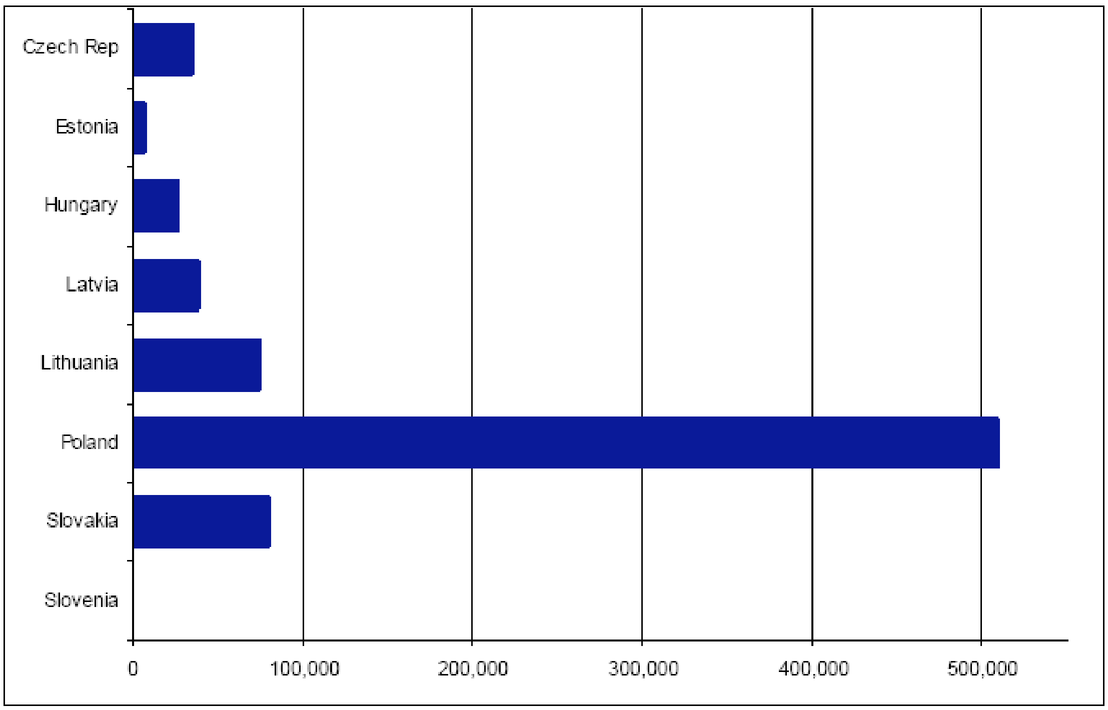
- Workers who are self-employed do not need to register.
- Applicants must register more than once if more than one employer employs them or if they change employer.
- An individual who has registered to work and who leaves employment is not required to de-register.
- The WRS data are recorded according to the location of the employer rather than the residential address of the applicant.
- The WRS excludes migrants who stay for less than one month or visit the UK for reasons other than work (e.g. students).

Number of approved applications

Using the WRS database, the following chart and table shows the nationality of approved applicants in the UK between May 2004 and December 2007.

- The majority are Polish (66% of the overall total), followed by Lithuanian (10%) and Slovakia (10%).
- Although 695 Slovenian applications had been approved since May 2004, it is too small to show up in the chart.

Figure 12: UK - Nationality of approved applicants, May 2004 - December 2007



Source: Accession Monitoring Report, May 2004 – December 2007. A joint online report between the Border and Immigration Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government (2008)

The numbers of approved applications within the UK by nationality are shown below (see Table 11). In summary:

- Overall, figures peaked in 2006, and since then, there has been a slight fall in numbers.
- Numbers of approved applications from the Czech Republic, Estonia, Latvia, Lithuania have steadily fallen since 2005.

- o The figures for Poland have risen and fallen, but the proportion of the total has been at around 70% for the last two years.
- o Slovakian approved applications have remained fairly static since 2005.
- o Hungary is the only A8 country that has shown a consistent increase in approved applications over the last four years.
- o The numbers in Slovenia are too small to make any meaningful conclusions.

Table 11: UK - Number of approved applications by nationality

Nationality	2004	2005	2006	2007
Czech Republic	8,255	10,575	8,345	7,380
Estonia	1,860	2,560	1,475	950
Hungary	3,620	6,355	7,060	8,720
Latvia	8,670	12,960	9,490	6,180
Lithuania	19,270	22,990	17,065	13,990
Poland	71,025	127,325	162,495	147,540
Slovakia	13,020	22,035	21,755	22,020
Slovenia	160	170	185	180
TOTAL	**125,880**	**204,970**	**227,875**	**206,965**

Source: Accession Monitoring Report, May 2004 – December 2007. A joint online report between the Border and Immigration Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government (2008)

Registered workers

Where data is reported for registered workers we have assumed that this is based on successful applications made rather than number of applications made. However, in exploring the WRS further, there do seem to be some discrepancies between 'approved' and registered'. Based on the WRS data, the proportion of registered workers from the A8 countries totalled around 500,000 in 2006, the majority (64%) of which were from Poland.

Table 12: UK - WRS registrations, May 2004 to December 2006 by country of origin

Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Slovakia	Slovenia	Total
23,982	5,285	14,983	28,119	52,975	317,125	50,612	451	493,533
5%	1%	3%	6%	11%	64%	10%	0.1%	100%

Source: Work Permits UK

The areas where registered workers are located within the UK varies (see Table 13):

- The majority (41.8%) tend to be located in the East, the South East or London.
- 8.4% are located in the West Midlands, with similar proportions in the North West and Yorkshire and Humber.

Table 13: UK - WRS registrations, May 2004 to December 2006 by Region

Region	Number	Per cent
London	79,100	16.0%
South East	67,649	13.7%
East of England	59,688	12.1%
East Midlands	49,799	10.1%
West Midlands	41,379	8.4%
North West	40,737	8.3%
Yorkshire and Humber	40,190	8.1%
South West	37,098	7.5%
Scotland	38,797	7.9%
N. Ireland	19,144	3.9%
Wales	14,106	2.9%
North East	5,773	1.2%

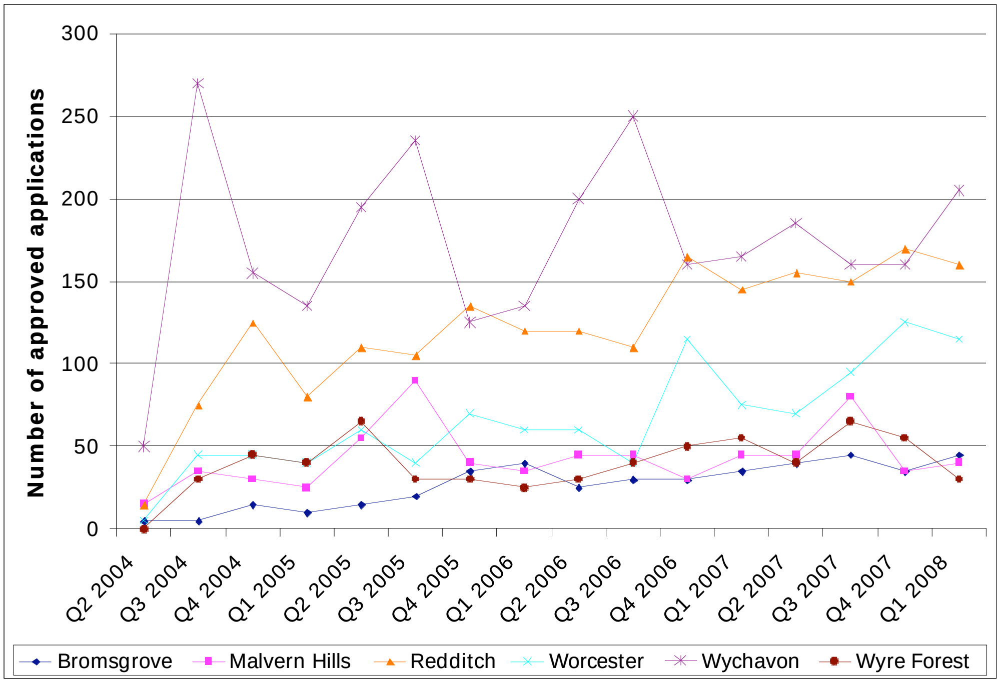
Source: Work Permits UK

Approved applications in Worcestershire Districts

The following figures (Figures 13 and 14) show for each quarter from Q2 2004 to Q1 2008 the number of approved applications for each of the districts within Worcestershire. The figures do fluctuate, but some linear trends can be seen:

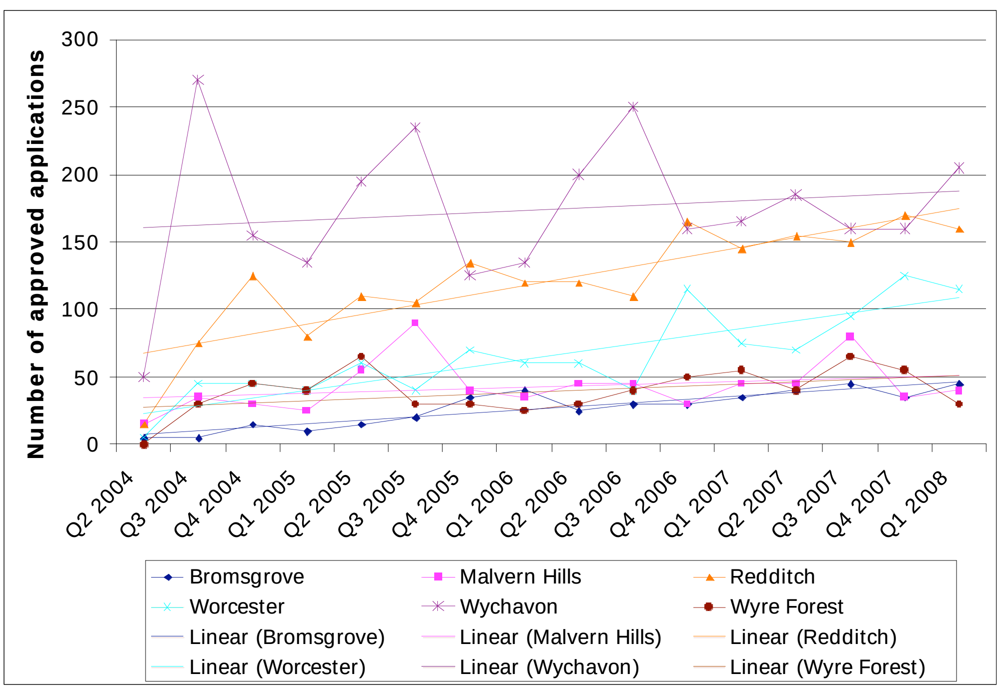
- Worcester and Redditch show the greatest rise
- Bromsgrove, Malvern Hills, Wychavon and Wyre Forest show a steady rise overall.
- Wychavon shows a sharp rise between Q2 2004 and Q3 2004 – sharper than any of the other districts. Figures for Wychavon generally peak in Q3 of each year (a seasonal trend in the agriculture sector), although the peak seemed relatively small in Q3 2007, but is picking up again in 2008.
- Redditch is more likely to peak in Q4 and then drop off slightly.

Figure 13: Worcestershire & the Districts - Approved applications Q2 2004 to Q1 2008



Source: WRS Database

Figure 14: Worcestershire & the Districts - Approved applications Q2 2004 to Q1 2008 – Trend lines

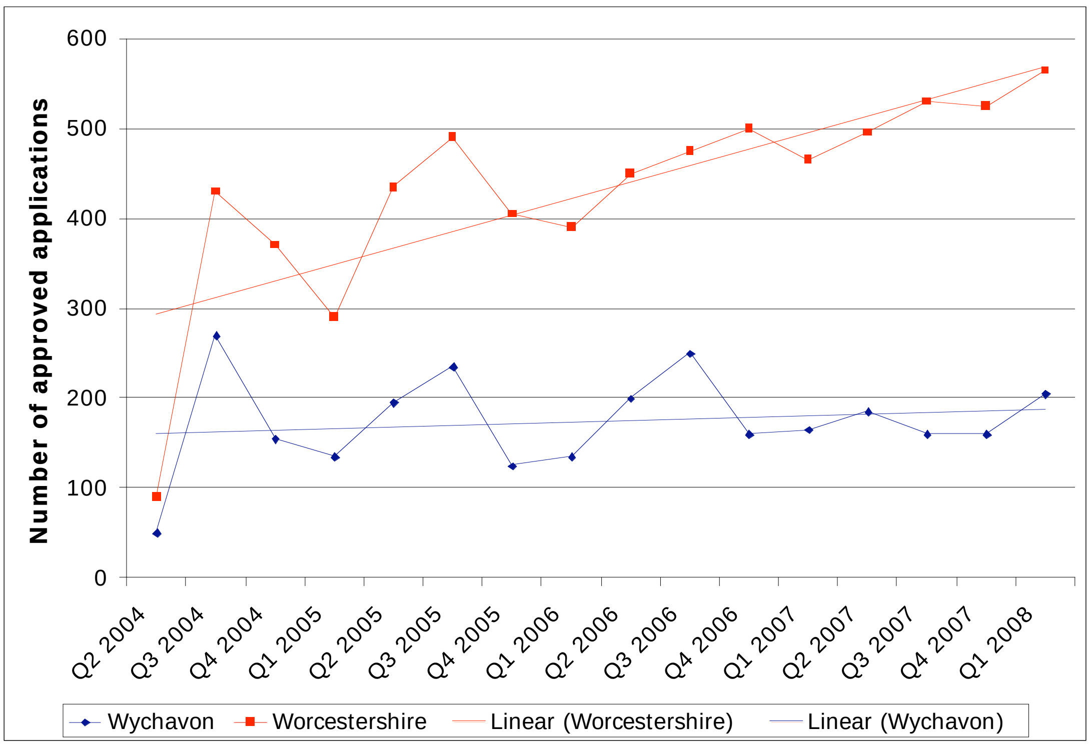


Source: WRS Database

The following figure (see Figure 15) shows for each quarter since Q2 2004 the number of approved applications within Worcestershire county and the district of Wychavon. The linear trend line shows:

- o Greater growth in Worcestershire overall compared to Wychavon, which appears to be fairly static.
- o In 2007, the variation of the number of approved applications for each quarter was minimal relative to other years, although it would seem that the trend is likely to be up in 2008.

Figure 15: Worcestershire & Wychavon - Approved applications Q2 2004 to Q1 2008 – Trend lines



Source: WRS Database

Sectors where registered workers are employed

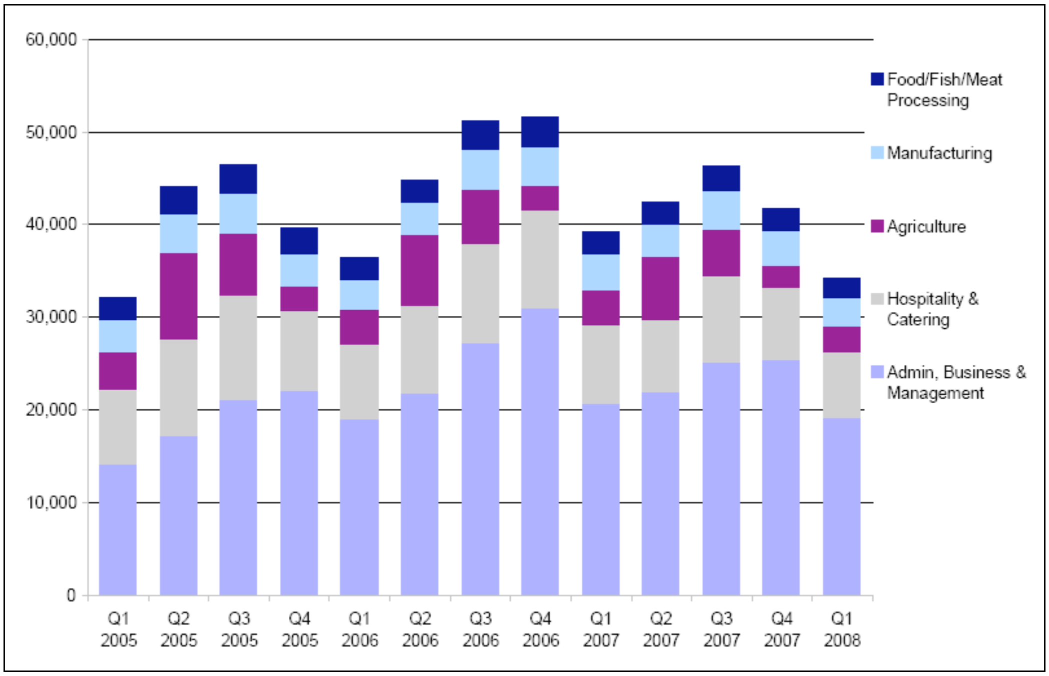
The following figure (see Figure 16) shows the top five sectors in which registered workers were employed within the UK, who applied between May 2004 and March 2008. They were:

- o Administration, business and management (39%);

- o Hospitality and catering (19%);
- o Agriculture (10%);
- o Manufacturing (7%); and
- o Food, fish, meat processing (5%).

For 2005, the peaks within these sectors were in Q2 and Q3; for 2006 the peaks were in Q3 and Q4; and in 2007 the figures peak in Q3.

Figure 16: UK - Top 5 sectors in which registered workers are employed, by quarter of application, January 2005 - March 2008



Source: Accession Monitoring Report, May 2004 – December 2007. A joint online report between the Border and Immigration Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government (2008)

In exploring the WRS database further, the following table (see Table 14) shows the key industry sectors within the West Midlands. The key points are:

- o Administration, business and managerial services is the largest sector overall, and this has been growing steadily over the years. This could indicate that migrants are more likely to move into jobs that are suitable to their skills/abilities.
- o The proportion in agriculture activities and manufacturing has remained fairly static.
- o There has been a slight decrease in hospitality and catering.

Table 14: West Midlands - Key industry sectors in which registered workers are employed, May 2004 - March 2008

Sectors	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Administration, business and managerial services	36.9	44.6	48.7
Agriculture activities	18.6	19.1	17.0
Hospitality and catering	12.5	9.8	8.5
Manufacturing	9.7	7.8	8.9
SBS sectors	5.1	3.8	3.9
Transport	4.8	3.1	2.2

Source: WRS Database

Within Wychavon over the three time periods:

- The dominant industries are agriculture and the SBS (food manufacturing and processing) sectors, although SBS sectors would seem to be in decline, with agriculture activities on the increase. Farming is a significant employer of migrant labour, and migrant labour has become an extremely significant cost-saving input.
- Hospitality and catering would appear to be on the decline slightly.
- Manufacturing has remained fairly static.
- The proportion in administration, business and managerial services is on the increase, but relatively speaking, this sector is not as dominant as for the West Midlands as a whole.

Table 15a: Wychavon - Key industry sectors in which registered workers are employed, May 2004 - March 2008

Wychavon	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
SBS sectors	28.5	21.9	21.8
Agriculture activities	21.9	28.4	33.8
Hospitality and catering	17.7	11.0	9.2
Administration, business and managerial services	11.5	15.5	19.0
Manufacturing	11.5	12.9	10.6
Construction and land services	2.7	2.6	0.7

Source: WRS Database

Wychavon notably differs from the other districts within Worcestershire (see tables 15b to 15e below) in that:

- o Bromsgrove is dominated by health and medical services, but have been on the decline between May 04 – March 08 (10.6% drop), and administration, business and managerial services, which are on the increase (13.5% rise).

Table 15b: Bromsgrove - Key industry sectors in which registered workers are employed, May 2004 – March 2008

Bromsgrove	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Health and medical services	37.9	50.0	27.3
Hospitality and catering	20.7	8.3	3.0
Manufacturing	17.2	8.3	12.1
Administration, business and managerial services	13.8	12.5	27.3
Transport	6.9	0.0	0.0
Retail and related services	0.0	4.2	6.1

Source: WRS Database

- o Malvern Hills is dominated by agriculture activities - although proportionately figures fluctuate over the three time periods - and hospitality and catering, where there has been growth (+6.9%).
- o There has also been a steady increase in those employed in the manufacturing sector (+7.2%).

Table 15c: Malvern Hills - Key industry sectors in which registered workers are employed, May 2004 – March 2008

Malvern Hills	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Agriculture activities	46.9	30.3	35.0
Health and medical services	17.2	18.2	5.0
Hospitality and catering	15.6	21.2	22.5
Manufacturing	7.8	9.1	15.0
SBS sectors	4.7	6.1	7.5
Retail and related services	1.6	0.0	0.0

Source: WRS Database

- Redditch is heavily dominated by those working in administration, business and managerial services, where figures have been on the increase. This could suggest that employees are generally moving to better forms of employment.

Table 15d: Redditch - Key industry sectors in which registered workers are employed, May 2004 - March 2008

Redditch	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Administration, business and managerial services	54.9	64.8	70.9
Manufacturing	17.6	14.8	2.5
SBS sectors	8.5	4.6	6.3
Hospitality and catering	7.2	5.6	2.4
Health and medical services	3.3	1.9	2.4
Retail and related services	1.3	2.8	0.8

Source: WRS Database

- As with Redditch, Worcester is heavily dominated by those working in administration, business and managerial services (now accounting for four in five employees), where figures have been on the increase. Again, this could suggest that employees are generally moving to better forms of employment.

Table 15e: Worcester - Key industry sectors in which registered workers are employed, May 2004 - March 2008

Worcester	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Administration, business and managerial services	61.6	72.4	80.2
Hospitality and catering	12.3	8.6	7.4
Manufacturing	6.8	5.2	2.5
Health and medical services	5.5	1.7	0.0
Retail and related services	4.1	5.2	2.5
Agriculture activities	2.7	3.4	0.0

Source: WRS Database

- Within the Wyre Forest there have been steady increases in the proportion working in administration, business and managerial services – around a 22% rise between May 04 – March 06.

- Over the same time period, there have been declines in manufacturing (around a 20% fall) and hospitality and catering.
- There has, however, been a sharp increase in construction and land services within the last year.

Table 15f: Wyre Forest - Key industry sectors in which registered workers are employed, May 2004 - March 2008

Wyre Forest	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Administration, business and managerial services	35.8	51.4	57.9
Manufacturing	30.2	17.1	10.5
Hospitality and catering	13.2	8.6	0.0
Health and medical services	9.4	0.0	2.6
Construction and land services	5.7	5.7	18.4
Retail and related services	1.9	11.4	2.6

Source: WRS Database

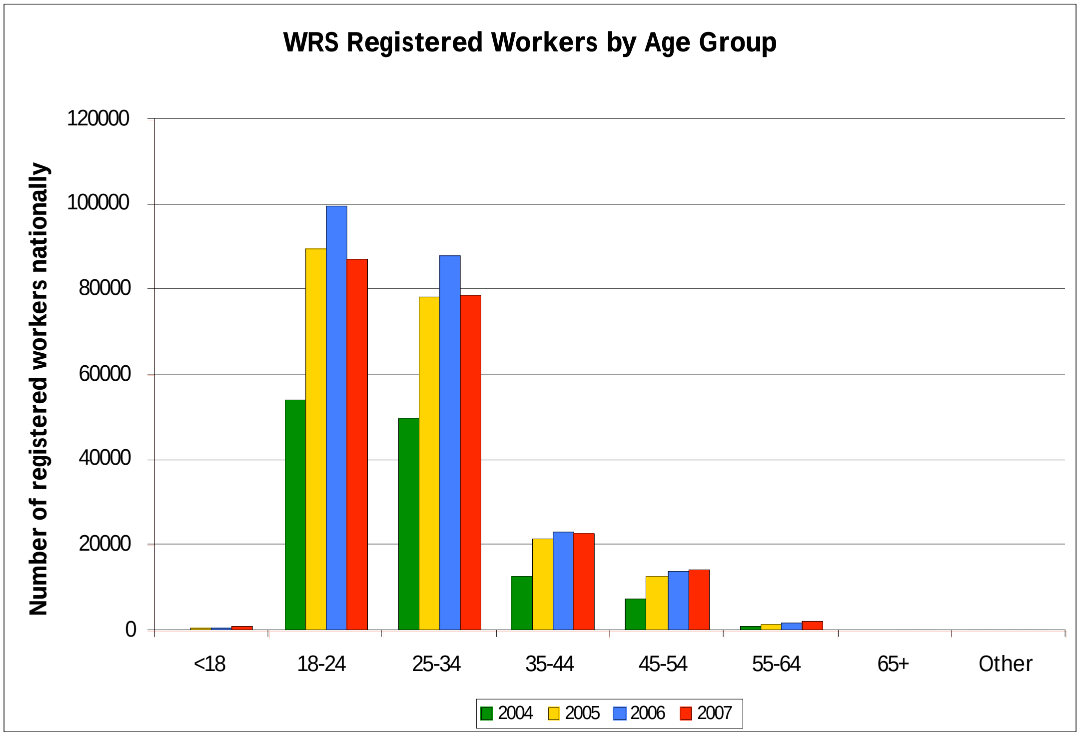
Age of migrants

A large proportion of A8 migrants coming to the UK are aged between 18 to 34 years. The following figure (see Figure 17), based on WRS registered workers, shows that around 90 per cent are represented by these age groups; with numbers peaking in 2006.

The age profile within Wychavon shows a fairly similar pattern to the national picture, with the majority aged between 18 to 34 years (see Table 16 and Figure 18):

- The proportion in the 18 to 24 age group, however, is showing a gradual decline over the three time periods (6.6% drop), whilst those in older groups have increased slightly.

Figure 17: UK - Age group of WRS registered workers



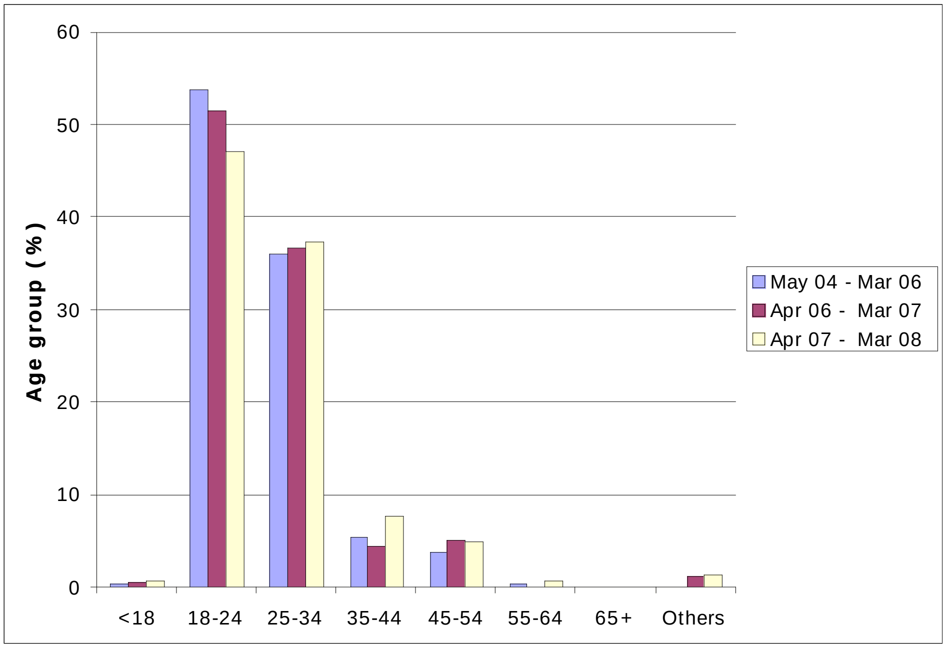
Source: Accession Monitoring Report, May 2004 – December 2007. A joint online report between the Border and Immigration Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government (2008)

Table 16: Wychavon - Age group of WRS registered workers

Age group	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
<18	0.4	0.6	0.7
18-24	53.8	51.6	47.2
25-34	36.2	36.8	37.3
35-44	5.4	4.5	7.7
45-54	3.8	5.2	4.9
55-64	0.4	0.0	0.7
65+	0.0	0.0	0.0
Others	0.0	1.3	1.4

Source: WRS Database

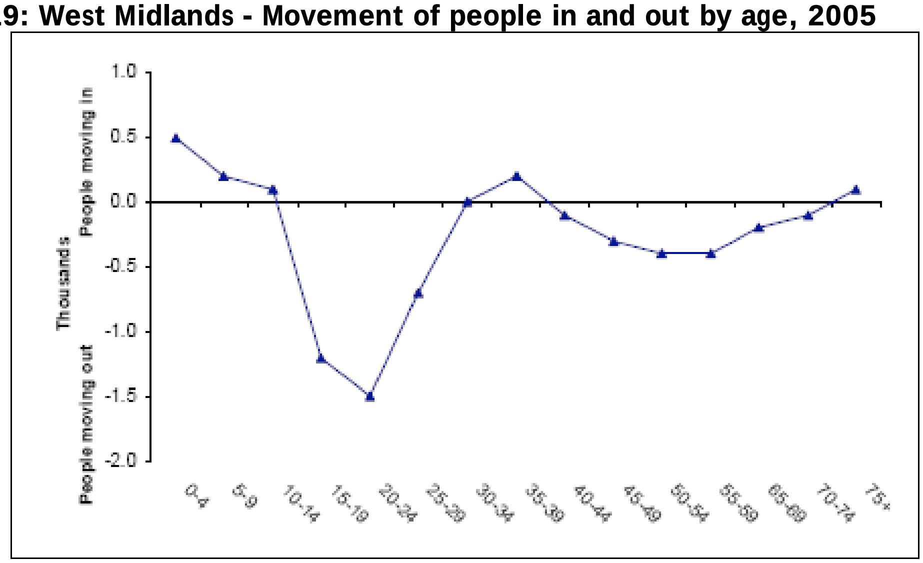
Figure 18: Wychavon - Age group of WRS registered workers



Source: WRS Database

Such labour also filled an age gap. Within the West Midlands, looking at internal migration by age for 2005, the greatest movement is of those aged 15 to 29 (approximately 3,000) out of the region. The majority of international migrants moving into the West Midlands for work were those aged between 18 to 34, and thus have been able to fill a gap, and thus provide the skills necessary to sustain economic growth within the region.

Figure 19: West Midlands - Movement of people in and out by age, 2005



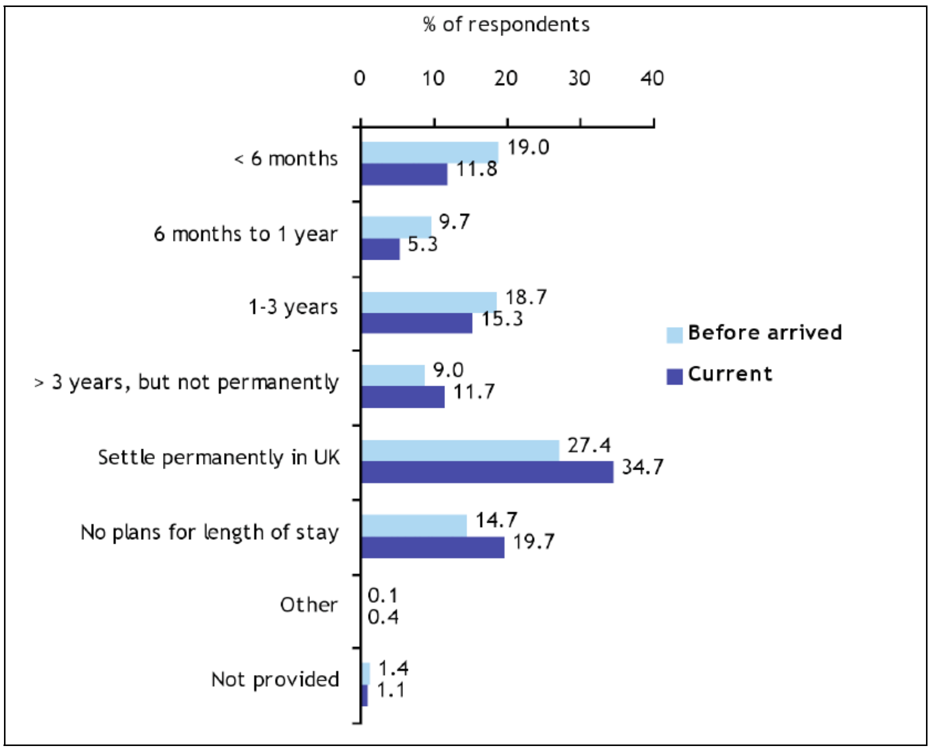
Source: West Midlands Key Health Data 2006/07

Plans for staying

According to a survey of migrant workers undertaken by the Institute for Employment Research at the University of Warwick:

- A fair proportion (27.4%) indicated that they wished to settle permanently in the UK before they arrived.
- However, plans change over time, and this figure has gone up to around one-third (34.7%) of migrant workers wishing to settle permanently in the UK.

Figure 20: UK - Original and current plans for staying, 2007



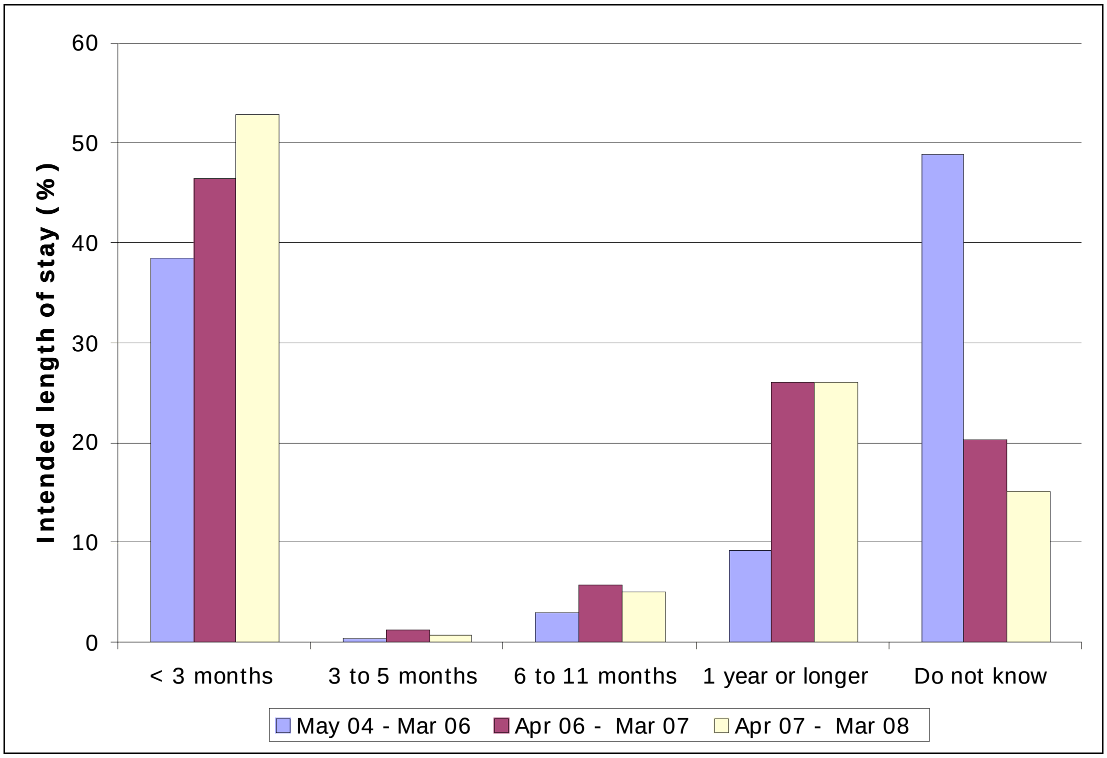
Source: The Economic Impact of Migrant Workers in the West Midlands (2007) – The West Midlands Migrant Worker Survey (n=712)

Within Wychavon, the following figure (see Figure 21) and table (Table 17) show some interesting trends.

- There seems to be less uncertainty as to what registered workers intend to do, with fewer specifying 'Don't know' as an option (down 33.6%).
- As a consequence, an increasing proportion of registered workers (52.9%) indicate that they intend to stay for less than three months over the three time periods.

- Conversely, around about one in four (26.1%) wish to stay for a year or longer.

Figure 21: Wychavon - Intended length of stay of WRS registered workers, May 2004 – March 2008



Source: WRS Database

Table 17: Wychavon - Intended length of stay of WRS registered workers, May 2004 – March 2008

Intended length of stay	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
< 3 months	38.5	46.5	52.9
3 to 5 months	0.4	1.3	0.7
6 to 11 months	3.1	5.7	5.1
1 to 2 years	5.4	22.3	19.6
More than 2 years	3.8	3.8	6.5
Do not know	48.8	20.4	15.2

Source: WRS Database

Migrants with dependants

The following table (see Table 18) shows the number of registered workers who have dependants, and this is represented as a percentage of the total for each year between 2004 and 2007.

- As the total number of registered workers increased between 2004 and 2006, so did the number of registered workers with dependants.
- In 2007 there was an approximately 10% drop in the total number of registered workers from A8 countries in the UK, and this was also reflected with a slight drop (only 0.9%) in the number of registered workers with dependants .
- Although numbers of registered workers would appear to be on the decline, the proportion of registered workers with dependants has actually increased, so that around 1 in 10 registered workers in 2007 have at least one dependant.

Table 18: UK - Registered workers' dependants by year of application, May 2004 - December 2007

Period	Total registered workers	Registered workers with dependants	Represented as a %
2004	125,880	5,485	4.4
2005	204,970	10,695	5.2
2006	227,875	19,790	8.7
2007	206,965	19,605	9.5

Source: Accession Monitoring Report, May 2004 – December 2007. A joint online report between the Border and Immigration Agency, Department for Work and Pensions, HM Revenue and Customs and Communities and Local Government (2008)

In attempting to explore the WRS database further to ascertain the picture at the local level, it is not possible to replicate the table above. It would seem that the archived data is summarised in such a way that does not allow us to link the number of registered workers with the number of dependants they have.

An alternative way of to look at this, is to calculate the number of dependants per 1,000 A8 migrants – to obtain an estimated prevalence figure. Table 19 shows trends at a national, regional, county and district level:

- At a national level there has been an 86% increase in the number of dependants per 1,000 between May 2004 and March 2008 - although the rate has slowed down since April 2006.

- In the West Midlands there has been a 96% increase in the number of dependants per 1,000 between May 2004 and March 2008, with a similar slowing down pattern to the national picture.
- In Worcestershire there has been a 98% increase in the number of dependants per 1,000 between May 2004 and March 2008. Although, there has been a slight drop since April 2006.

Table 19: UK, West Midlands, Worcestershire & the Districts – Estimated number of dependants per 1,000

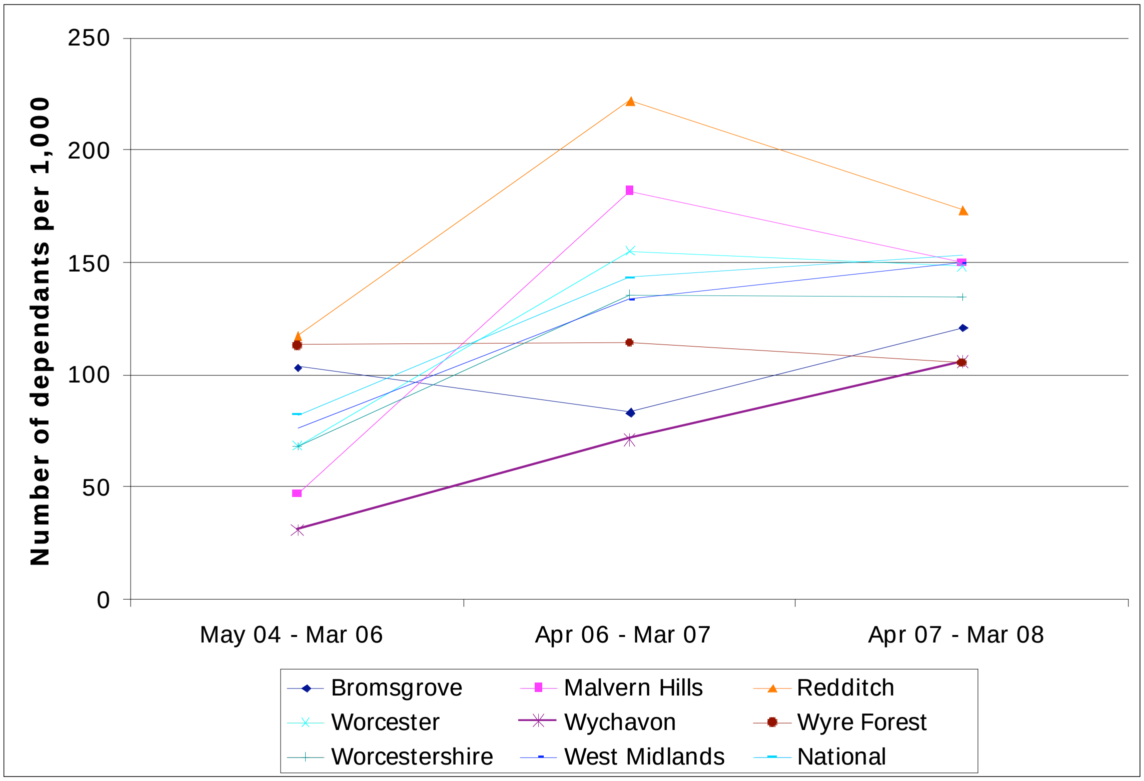
Area	May 04 - Mar 06	Apr 06 - Mar 07	Apr 07 - Mar 08
Bromsgrove	103.4	83.3	121.2
Malvern Hills	46.9	181.8	150.0
Redditch	117.6	222.2	173.2
Worcester	68.5	155.2	148.1
Wychavon	**30.8**	**71.0**	**105.6**
Wyre Forest	113.2	114.3	105.3
Worcestershire	68.0	135.6	134.5
West Midlands	76.2	133.5	149.8
National	82.2	143.1	153.2

Source: WRS Database

To highlight the variations within Worcestershire, the following figure (see Figure 22) shows clearly the differences between the districts, along with the national, regional and county picture:

- Within the Worcestershire districts, estimations peaked between April 2006 and March 2007 for Malvern Hills, Redditch and Worcester, followed by a drop in April 2007 to March 2008 – going against the national and regional picture.
- In Bromsgrove, estimations dropped but this was followed by an increase in April 2007 to March 2008.
- Wychavon is the only district within Worcestershire that shows growth (over 240% overall) over the three time periods, and mirrors the national and regional picture but not the local one - although numbers per 1,000 are clearly a lot lower than many of the other districts.

Figure 22: UK, West Midlands, Worcestershire & the Districts - Estimated number of dependants per 1,000



Source: WRS Database

Claiming benefits

A popular myth is that overseas migrants are a burden on society and are here to take advantage of out-of-work benefits. Whilst the figures were fairly high in 2001/02, with around one in eight claiming benefits, the figure has dropped to around 3% in 2005/06 and would appear to be remaining constant.

- The biggest drop in claimants was between 2002/03 to 2003/04 (a 4% drop).
- The myth cannot be targeted at A8 migrants, as clearly, such migrants would not benefit from being out of work, as their primary purpose for coming to the UK is to work.

Figure 23: UK - Overseas Nationals entering the UK and allocated a NINo: Those claiming an out-of-work benefit within 6 months of registration, by Year of Arrival

Thousands

	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
All	**32.9**	**36.1**	**34.7**	**20.6**	**17.7**	**15.9**
JSA	23.3	26.7	25.8	14.8	13.7	13.0
IB/SDA	3.3	2.9	2.8	1.9	1.7	1.4
IS	5.9	6.2	5.7	3.7	2.0	1.3
% on out-of-work benefits	*11%*	*12%*	*10%*	*6%*	*3%*	*3%*

Source: 100% extract from National Insurance Recording System at 14th May 2007.
Figures are rounded to the nearest hundred and may not sum due to rounding.
Arrivals figures subject to change as some migrants may take several months or years between arrival and NINo application/registration.

JSA - Jobseeker's Alowance
IB/SDA - Incapacity Benefit or Severe Disablement Allowance
IS - Income Support

Source: National Insurance Number Allocations to Overseas Nationals Entering the UK, DWP (2007)

3. Wychavon local economy and employment

Nomis (www.nomisweb.co.uk) provides information on official labour market statistics and provides data on employee jobs. The following table (see Table 20) shows that there were:

- 47,700 employee jobs in Wychavon in 2006.
- Compared to the West Midlands (14.7%) and Great Britain (10.9%), there is a greater percentage (18.6%) in manufacturing within Wychavon and a smaller proportion in finance, IT, other business activities.
- The statistics do not provide any specific information on agriculture employees.

Table 20: Wychavon – Employee jobs, 2006

Employee jobs (2006)	Wychavon	Wychavon	West Midlands	Great Britain
	(employee jobs)	(%)	(%)	(%)
Total employee jobs	47,700	na	na	na
Full-time	32,800	68.8	68.8	68.9
Part-time	14,900	31.2	31.2	31.1
Employee jobs by industry				
Manufacturing	8,900	18.6	14.7	10.9
Construction	2,000	4.1	5.0	4.8
Services	35,100	73.6	78.9	82.9
Distribution, hotels & restaurants	12,600	26.5	23.7	23.5
Transport & communications	2,600	5.4	5.6	5.9
Finance, IT, other business activities	6,600	13.9	17.8	21.2
Public admin, education & health	10,200	21.4	26.6	26.9
Other services	3,100	6.5	5.1	5.3
Tourism-related†	4,500	9.5	7.7	8.3

Source: ONS annual business inquiry employee analysis.

Excludes self employed, government-supported trainees and HM Forces.

Within Wychavon, the number of employee jobs increased 21.4% between 1995 and 2006. This compares favourably to the West Midlands (11.3% increase) and nationally (15.8%). Since 2001, however:

- o The number of employee jobs has gone down by only 0.8% (from 48,100 to 47,700), compared with a 3% drop for the West Midlands and 3.3% nationally (see Table 21).

Table 21: Great Britain, West Midlands & Wychavon – Employee trends, 1995-2006

Year	Wychavon (employee jobs)	West Midlands (employee jobs)	Great Britain (employee jobs)
1995	39,301	2,135,991	22,728,869
1996	42,401	2,189,536	23,137,135
1997	45,273	2,211,724	23,747,609
1998	46,300	2,290,700	24,355,000
1999	48,300	2,312,600	24,827,400
2000	45,700	2,286,700	25,214,600
2001	48,100	2,308,400	25,490,300
2002	45,300	2,324,800	25,593,700
2003	45,300	2,322,700	25,710,600
2004	45,900	2,346,800	26,067,500
2005	45,800	2,374,400	26,496,600
2006	47,700	2,377,400	26,320,600

Source: ONS annual business inquiry employee analysis

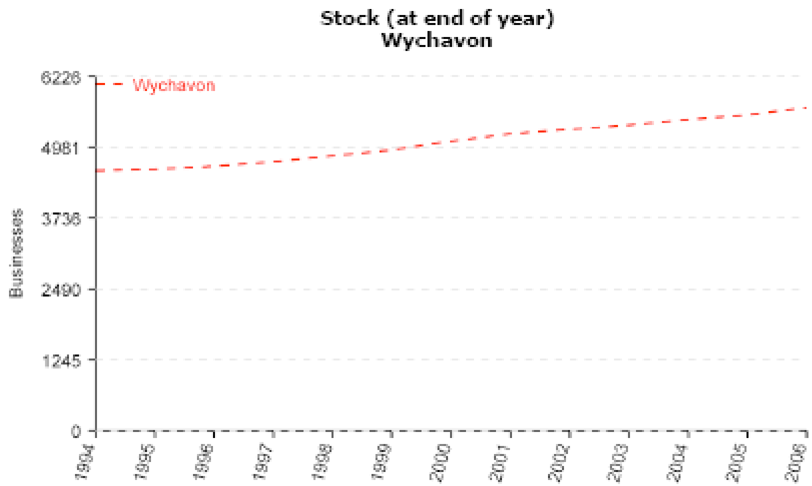
Number of businesses

Official labour market statistics such as the number of businesses and trends within Wychavon can be also found on www.nomisweb.co.uk.

The following figure (see Figure 24) shows that the number businesses between 1994 and 2006 increased by 24.3%. This can be compared with the West Midlands (19.9% increase) and nationally (21.2%). Since 2001:

- o The number of registered businesses has grown by 8.8% since 2001. This compares with a 9.4% growth within the West Midlands and 9.5% for Great Britain as a whole; so slightly lower than regional and national averages.

Figure 24: Great Britain, West Midlands & Wychavon - Number of businesses, 1994 - 2006



Year	Wychavon (businesses)	West Midlands (businesses)	Great Britain (businesses)
1994	4,555	137,475	1,561,975
1995	4,575	137,255	1,562,570
1996	4,620	138,100	1,578,275
1997	4,705	140,640	1,615,530
1998	4,805	143,520	1,653,310
1999	4,915	145,830	1,682,655
2000	5,065	148,525	1,709,730
2001	5,200	150,620	1,728,460
2002	5,290	153,090	1,749,480
2003	5,345	156,005	1,785,345
2004	5,460	158,725	1,816,715
2005	5,550	161,865	1,853,825
2006	5,660	164,810	1,892,385

Source: DTI Small Business Service - vat registrations/deregisrations by industry

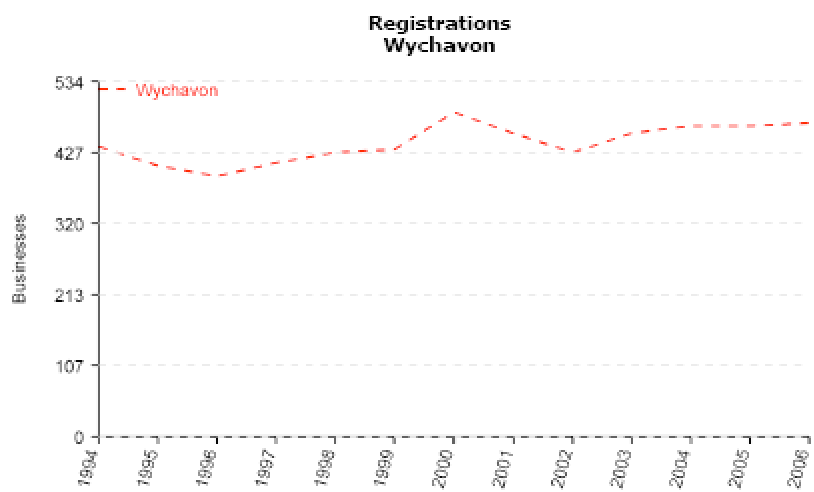
Source:
http://www.nomisweb.co.uk/reports/lmp/la/2038431943/subreports/vat_time_series/report.aspx?

VAT registrations

The number of VAT registrations can also be found on www.nomisweb.co.uk. The following figure (see Figure 25) shows that:

- The number of VAT registrations has grown by 3.3% since 2001. This compares with a 4.8% growth within the West Midlands and 6.8% for Great Britain as a whole; so slightly lower than regional average and about half the national average.

Figure 25: Great Britain, West Midlands & Wychavon - VAT registrations, 1994 - 2006



Year	Wychavon (businesses)	West Midlands (businesses)	Great Britain (businesses)
1994	435	13,750	163,430
1995	405	13,175	158,065
1996	390	13,235	162,340
1997	410	14,575	178,735
1998	425	14,730	178,460
1999	430	14,445	173,250
2000	485	14,595	175,450
2001	455	14,120	166,465
2002	425	14,600	173,330
2003	455	15,810	187,375
2004	465	15,160	179,580
2005	465	14,785	177,285
2006	470	14,800	177,765

Source: DTI Small Business Service - vat registrations/deregisrations by industry

Source:
http://www.nomisweb.co.uk/reports/lmp/la/2038431943/subreports/vat_time_series/report.aspx?

The information provided in the tables and figures above points to a growing number of businesses which puts pressure on local employment.

Unemployment trends

Unemployment trends can be found on the Worcestershire County Council website (www.worcestershire.gov.uk). Although unemployment can be measured in different ways, the latest figures for unadjusted claimant count (using 2001 Census projections) are recorded in the table (see Table 22) at national, regional, county and district level below

- The unemployment rate within Wychavon is currently around 1.5% (as at May 2008). This is down from 1.8% at the same point the previous year.
- The figure for Wychavon compares favourably with the county (1.9%), regional (3.9%) and national (2.9%) figures.
- The trend is a decrease in the unemployment rate compared to the previous year.

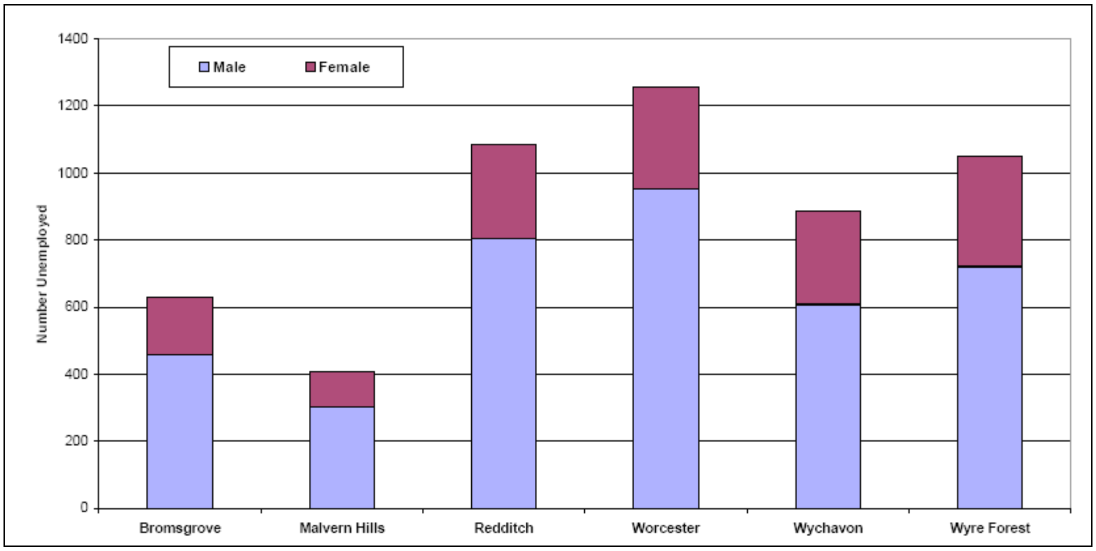
Table 22: England & Wales, West Midlands, Worcestershire & the Districts - Unadjusted claimant count unemployment, May 2007 - May 2008

Region	May 08	Apr 08	May 07	% Change on previous month	% Change on previous year
Bromsgrove	1.4%	1.4%	1.5%	0.0	-6.7
Malvern Hills	1.2%	1.3%	1.6%	-7.7	-25.0
Redditch	2.6%	2.6%	2.7%	0.0	-3.7
Worcester	2.6%	2.6%	3.0%	0.0	-13.3
Wychavon	1.5%	1.6%	1.8%	-6.3	-16.7
Wyre Forest	2.1%	2.2%	2.4%	-4.5	-12.5
Worcestershire	1.9%	2.0%	2.2%	-5.0	-13.6
West Midlands	3.9%	4.0%	4.2%	-2.5	-7.1
England & Wales	2.9%	2.9%	3.1%	0.0	-6.5

Source: www.worcestershire.gov.uk NB: The unemployment rates for Districts listed in the above table are calculated using 2001 Census projections of the economically active population.

The following figure (see Figure 25) shows that there were 885 unemployed in Wychavon for May 2008, and this is split by males (n=608) and females (n=277). The number unemployed is less in Bromsgrove and Malvern Hills.

Figure 26: Worcestershire Districts - Unadjusted claimant count unemployment: male and female split, May 2008



Source: www.worcestershire.gov.uk NB: The unemployment rates for Districts listed in the above table are calculated using 2001 Census projections of the economically active population.

Migrants and employment

The following table shows how the majority of migrants found their first job in the UK (see Table 23).

- The majority of those from the A8 found their first job in the UK either via a recruitment/employment agency (37.9%) in the UK or via a friend/family member (30.2%).

Table 23: UK - How migrants found their current (first) job, 2007

How respondents found their job	A8	A2	EU15	New Common-wealth	Old Common-wealth	Other Europe	Rest of World	Not stated	Total
Via a recruitment/ employment agency in the UK	37.9	9.3	42.9	26.4	22.2	13.3	27.3	57.7	32.3
Via a recruitment/ employment agency in home country	10.2	62.8	0.0	2.2	66.7	80.0	6.1	7.7	12.9
Via a friend/ family member	30.2	14.0	28.6	39.0	11.1	0.0	39.4	19.2	31.0
Contacted employer directly when had arrived in the UK	13.5	4.7	28.6	21.4	0.0	0.0	25.8	7.7	15.6
Contacted employer directly whilst in home country	2.5	0.0	0.0	8.8	0.0	0.0	0.0	11.5	3.9
Other	3.8	9.3	0.0	2.2	0.0	6.7	3.0	3.8	3.7
Not provided	4.1	0.0	0.0	1.1	0.0	0.0	0.0	0.0	2.4
Total (n)	*364*	*43*	*7*	*182*	*9*	*15*	*66*	*26*	*712*

Source: The Economic Impact of Migrant Workers in the West Midlands (2007) – The West Midlands Migrant Worker Survey

4. Local housing profile and trends

Whilst the influx of migrant workers is helping to support the local economy by filling occupations where there are labour shortages, a continued steady rise in the local migrant worker population could bring future challenges, as demands on services such as housing and healthcare may increase. Currently:

- There are over 50,000 homes in Wychavon; 76% of which are owned outright compared with 68.2% nationally.
- House prices are higher than the average for England and Wales.
- There is an annual shortfall in the availability of affordable housing.

One of the big challenges the areas faces is balancing the need for new development with protecting the natural and built environment that makes Wychavon such an attractive place to live and work. This is currently a big issue, with the Regional Spatial Strategy (RSS) identifying significant levels of potential growth for the area.

Housing growth

The total amount of new housing required is the combined projection of:

- the net growth in the number of households within each district (taking account of both formation and dissolution), plus
- the net effect of in-migration and out-migration of existing households.

A measure of total potential housing demand can be deduced from the 2003 sub-national household projections (see Table 24). For the whole of Worcestershire these would be as set out below – based on 2005/06 data.

Table 24: Worcestershire & Districts – Total trend based housing demand by district, 2001-2026

	Growth	Migration	Total
Malvern Hills	1,112	8,333	9,445
Wychavon	6,343	9,608	15,951
Worcester City	8,193	2,293	10,486
South Worcestershire	15,648	20,234	35,882
Rest of Worcs.	16,164	7,848	24,012
Worcestershire	31,812	28,082	59,894
South Worcestershire Proportion	49%	72%	60%

Source: RSS Spatial Options paper, Appendix One Table Two

Housing stock condition

- For the Wychavon district total, a fairly high proportion (56%) is either non decent, unfit, disrepair, vulnerable non decent or fuel poverty (see Table 25).

Table 25: Wychavon - Housing stock condition by sub area

Wychavon District	Total	Non decent		Unfit		Disrepair		Vulnerable non decent		Fuel poverty	
Wyre Forest	1827	766	42%	105	6%	202	11%	93	5%	237	13%
Droitwich Town	7671	1738	23%	146	2%	345	5%	401	5%	513	7%
Droitwich North	698	265	38%	33	5%	71	10%	40	6%	65	9%
Droitwich Area	10196	2768	27%	284	3%	618	6%	534	5%	815	8%
Worcester North	1963	697	36%	74	4%	167	8%	86	4%	211	11%
Worcester N.E.	936	326	35%	45	5%	73	8%	32	3%	100	11%
Worcester East	1003	371	37%	49	5%	80	8%	39	4%	133	13%
Worcester S.E.	876	266	30%	32	4%	51	6%	34	4%	76	9%
Worcester South	1065	196	18%	20	2%	46	4%	21	2%	47	4%
Redditch	2130	716	34%	78	4%	169	8%	67	3%	295	14%
Worcester Area	7972	2572	32%	298	4%	586	7%	280	4%	862	11%
Pershore Town	2630	919	35%	85	3%	190	7%	228	9%	186	7%
Pershore South	984	333	34%	36	4%	74	8%	40	4%	92	9%
Pershore North	1061	411	39%	39	4%	93	9%	50	5%	99	9%
Pershore Area	4675	1663	36%	160	3%	357	8%	318	7%	377	8%
Cheltenham	1933	641	33%	68	4%	142	7%	82	4%	182	9%
Evesham Town	8032	2349	29%	248	3%	587	7%	529	7%	616	8%
Evesham South	914	354	39%	39	4%	85	9%	55	6%	105	11%
Evesham East	3589	1414	39%	149	4%	335	9%	219	6%	365	10%
Evesham N.E.	855	265	31%	27	3%	62	7%	41	5%	72	8%
Evesham West	1017	467	46%	56	6%	113	11%	70	7%	125	12%
Broadway	1924	628	33%	64	3%	143	7%	122	6%	267	14%
Evesham Area	18265	6119	34%	651	4%	1467	8%	1116	6%	1732	9%
Wychavon Total	41108	13123	32%	1393	3%	3029	7%	2248	5%	3787	9%

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

Council tax bands

- For the Wychavon area, council tax bands A&B are more likely to be in Droitwich, E&H for Worcester, C&D for Pershore and Evesham (see Table 26).

Table 26: Wychavon District: Council tax bands by district and local housing market area

District	Local Housing Market Area	Bands A&B	Bands C&D	Bands E-H	Total No.
Wychavon	Droitwich	41%	29%	30%	14,878
	Worcester	12%	39%	49%	7,434
	Pershore	28%	42%	30%	5,806
	Evesham	33%	41%	26%	22,560

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

Social housing stock

Table 27 shows social housing stock by sub area within Wychavon:

Table 27: Wychavon District – Social housing stock by sub area

Wychavon District	1 bed		2 bed flats		2 bed other		3 bed		4 bed		Total
Sub Area	No.	%	No.	%	No.	%	No.	%	No.	%	No.
W/ Forest	57	27%	60	29%	37	18%	54	26%	0	0%	208
D/wich Town	746	34%	264	12%	331	15%	757	34%	99	4.5%	2197
D/wich North	48	24%	65	33%	30	15%	54	27%	1	0.5%	198
D/wich South	2	4%	14	29%	17	35%	14	29%	1	2.1%	48
Droitwich Area	853	32%	403	15%	415	16%	879	33%	101	3.8%	2651
Worc. North	34	21%	46	29%	20	13%	57	36%	3	1.9%	160
Worc. N.East	7	19%	2	5%	9	24%	19	51%	0	0%	37
Worc. East	18	37%	2	4%	11	22%	18	37%	0	0%	49
Worc. S.East	9	9%	10	10%	48	48%	32	32%	0	0%	99
Worc. South	50	34%	7	5%	33	22%	58	39%	0	0%	148
Redditch	14	23%	0	0%	28	47%	18	30%	0	0%	60
Worcester Area	132	24%	67	12%	149	27%	202	37%	3	0.5%	553
P/shore Town	255	42%	27	4%	132	22%	182	30%	9	1.5%	605
P/shore South	19	21%	0	0%	35	38%	38	41%	0	0%	92
P/shore North	16	14%	8	7%	53	45%	41	35%	0	0%	118
Pershore Area	290	36%	35	4%	220	27%	261	32%	9	1.1%	815
Cheltenham	20	17%	19	16%	53	44%	28	23%	1	0%	120
E/sham Town	686	38%	137	8%	409	23%	556	31%	0	1.1%	1808
E/sham South	33	23%	0	0%	53	37%	58	40%	0	0%	144
E/sham East	113	18%	24	4%	215	33%	290	45%	0	0.2%	643
E/sham N.East	38	18%	4	2%	89	42%	80	38%	2	0%	211
E/sham West	10	17%	12	0%	19	32%	19	32%	2	0%	60
E/sham North	3	9%	0	20%	13	37%	19	54%	3	0%	35
Broadway	52	23%	27	12%	55	24%	90	40%	3	0.9%	226
Evesham Area	955	29%	223	7%	906	28%	1140	35%	23	0.7%	3247
District Total	2230	31%	728	10%	1690	23%	2482	34%	136	1.9%	7266

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

- Wychavon is split almost exactly equally between 1, 2 and 3 bedroom properties, with two thirds of the 2 bedroom ones being either houses or bungalows as opposed to flats.
- 1 bedroom properties are a larger proportion of the stock in the main towns.
- Rural areas around Evesham and Pershore have very low proportions of flats.
- 4 bedroom properties are virtually non-existent outside Pershore Town and Droitwich Town.

Affordable housing

In the Local Housing Needs Report (2008) the Strategic Housing Market Assessment for the South Housing Market Area established "the amount of affordable housing that will be required to meet the combined needs of existing and newly forming households, expressed in terms of different costs, and therefore tenures, as a series of annual shortfalls for each District and Local Housing Market area". Table 28 reproduces the District based tables from that report. From existing stock, there is an annual:

- Gross need of 687 for private and social rent.
- Surplus of 42 for private rent.
- Shortfall of 363 for social rent.

Table 28: Wychavon - Annual housing need and supply by tenure

Wychavon District	Buy 100%	Private Rent	Buy 75%	Buy 50%	Social Rent	Total
Backlog Reduction	0	0	0	76	152	228
Newly Forming	365	102	94	60	346	967
Falling Into Need	0	0	0	43	87	130
Annual Gross Need	**365**	**102**	**94**	**179**	**585**	**1325**
Lower Quartile Re-sales	506	0	0	0	0	506
Social Re-lets	0	0	0	0	401	401
From Falling into Need	Included in re sales	87	0	0	0	87
From B/log Reduction (Total of 570 from waiting list x 10%)		57	0	0	0	57
Total Supply: Existing Stock	**506**	**144**	**0**	**0**	**401**	**1051**
Annual Shortfall or (Surplus)	**(141)**	**(42)**	**94**[3]	**179**	**184**	**274**
Annual Need: Subsidised Affordable Housing				**363**		
Annual New Supply: 2006/11	**330**			**140**		**470**
Annual New Supply: post 2011	**278**			**186** (at 40%)		**464**

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

The District figures have been broken down further by housing market areas within each district (see Tables 29a to 29c). In terms of subsidised affordable housing, there is an annual shortfall of:

- 66 in the Droitwich area.
- 147 in the Evesham area.
- 23 in the Pershore area.

Table 29a: Droitwich Area - Annual housing need and supply by tenure

Droitwich Area of Wychavon District	Buy 100%	Private Rent	Buy 75%	Buy 50%	Social Rent	Total
Backlog Reduction at 10% (Table 38)	0	0	0	22	45	67
Newly Forming (30% of total: Table 19)	110	31	28	18	104	291
Falling Into Need (Table 8)	0	0	0	9	19	28
Annual Gross Need	**110**	**31**	**28**	**49**	**168**	**386**
Re-sales at Lower Quartile (Table 29)	151	0	0	0	151	151
Social Re-lets (Table 37)	0	0	0	0	0	163
From Falling into Need (Table 8)	Incl. in re-sales	19	0	0	0	19
From B/log Reduction (Table 40)		8	0	0	0	8
Total Supply: Existing Stock	**151**	**27**	**0**	**0**	**151**	**341**
Annual Shortfall or (Surplus)	**(41)**	**4**	**28**	**49**	**17**	**45**
Annual Need: Subsidised Affordable Housing				**66**		
Annual New Supply 2006/11 (Table 36)	**85**			**35**		**120**
Annual New Supply post 2011 (Table 36)	**To be determined through LDF process**					

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

Table 29b: Evesham Area - Annual housing need and supply by tenure

Evesham Area of Wychavon District	Buy 100%	Private Rent	Buy 75%	Buy 50%	Social Rent	Total
Backlog Reduction at 10% (Table 38)	0	0	0	35	72	107
Newly Forming (46% of total: Table 19)	168	47	43	28	159	445
Falling Into Need (Table 8)	0	0	0	8	17	25
Annual Gross Need	**168**	**47**	**43**	**71**	**248**	**577**
Re-sales at Lower Quartile (Table 29)	229	0	0	0	0	229
Social Re-lets (Table 37)	0	0	0	0	172	172
From Falling into Need (Table 8)	Incl. in re-sales	17	0	0	0	17
From B/log Reduction (Table 40)		11	0	0	0	11
Total Supply: Existing Stock	**229**	**28**	**0**	**0**	**172**	**429**
Annual Shortfall or (Surplus)	**(61)**	**19**	**43**	**71**	**76**	**148**
Annual Need: Subsidised Affordable Housing				**147**		
Annual New Supply 2006/11 (Table 36)	**140**			**60**		**200**
Annual New Supply post 2011 (Table 36)	**To be determined through LDF process**					

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

Table 29c: Pershore Area - Annual housing need and supply by tenure

Pershore Area of Wychavon District	Buy 100%	Private Rent	Buy 75%	Buy 50%	Social Rent	Total
Backlog Reduction at 10% (Table 38)	0	0	0	11	22	33
Newly Forming (11% of total: Table 19)	40	11	10	7	38	106
Falling Into Need (Table 8)	0	0	0	1	3	4
Annual Gross Need	**40**	**11**	**10**	**19**	**63**	**143**
Re-sales at Lower Quartile (Table 29)	53	0	0	0	0	53
Social Re-lets (Table 37)	0	0	0	0	59	59
From Falling into Need (Table 8)	Incl. in re-sales	3	0	0	0	3
From B/log Reduction (Table 40)		7	0	0	0	7
Total Supply: Existing Stock	**53**	**10**	**0**	**0**	**59**	**122**
Annual Shortfall or (Surplus)	**(13)**	**1**	**10**	**19**	**4**	**21**
Annual Need: Subsidised Affordable Housing				**23**		
Annual New Supply 2006/11 (Table 36)	**40**			**20**		**60**
Annual New Supply post 2011 (Table 36)	**To be determined through LDF process**					

Source: Local Housing Needs Report, The South Housing Market Partnership, 2008

Migrants by tenure

The table below shows the housing tenure profile of all migrant workers in the West Midlands Migrant Worker Survey and contrasts the tenure profiles of different national groups. For the A8 countries:

- Over two-thirds (68.4%) were more likely to be private renting, higher than A2 but lower than EU15.
- 6.9% were likely to be in social renting, higher than A2 and EU15.
- A further 10% approximately were staying with friends or family (see Table 30).

Table 30: UK - Housing tenure profiles of labour migrants by broad region of origin

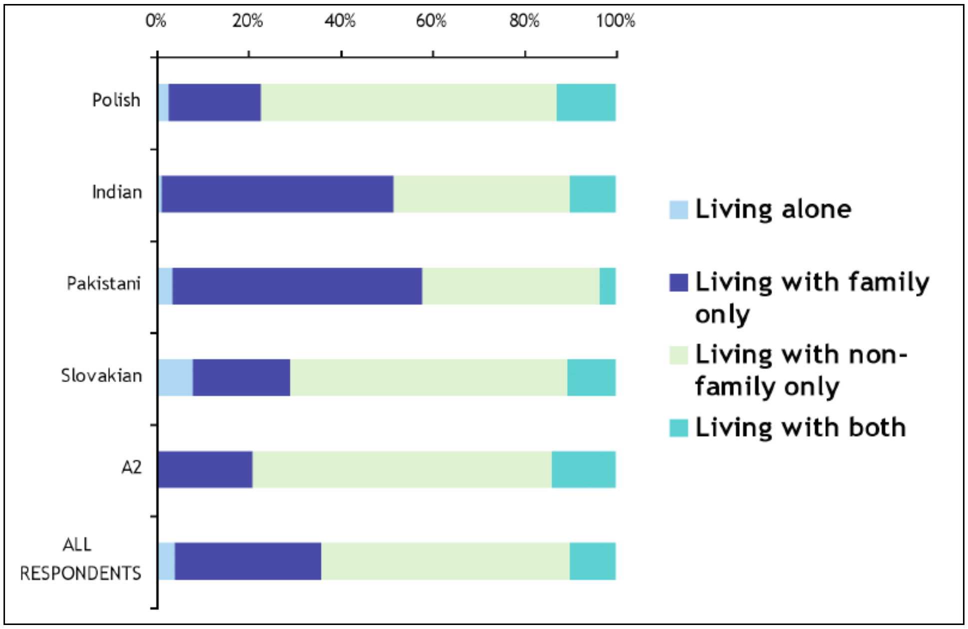
Broad region of origin	Owning or buying	Private renting	Social renting	Staying with friends/ family	House/ flat provided by employer	Dormitory/ communal accommodation provided by employer	Bed & breakfast accommodation	Caravan	Other	Not provided
A8	2.7	68.4	6.9	9.9	2.7	4.7	0.3	3.0	0.5	0.8
A2	4.7	20.9	0.0	0.0	7.0	25.6	0.0	41.9	0.0	0.0
EU15	0.0	85.7	0.0	14.3	0.0	0.0	0.0	0.0	0.0	0.0
New Commonwealth	29.1	53.8	2.7	9.9	0.5	2.7	0.0	0.0	1.1	0.0
Old Commonwealth	11.1	11.1	0.0	11.1	66.7	0.0	0.0	0.0	0.0	0.0
Other Europe	0.0	13.3	0.0	0.0	0.0	0.0	0.0	86.7	0.0	0.0
Rest of World	13.6	65.2	12.1	4.5	3.0	0.0	0.0	1.5	0.0	0.0
Not stated	3.8	53.8	19.2	3.8	0.0	7.7	0.0	11.5	0.0	0.0
ALL	10.7	59.3	6.0	8.4	3.1	4.9	0.1	6.5	0.6	0.4

Source: The Economic Impact of Migrant Workers in the West Midlands (2007) – The West Midlands Migrant Worker Survey (n=712)

The following figure (see Figure 27) shows patterns of sharing accommodation with friends and family for different national groups. This highlights that:

- Pakistani and Indian respondents are more likely than the sample average to share with family and less likely to live with non-family members
- A2 migrants are least likely to live alone
- A2 migrants, Polish and Slovakian migrants are more likely than average to share accommodation with non-family members.

Figure 27: West Midlands - Sharing of accommodation with family and non-family members - selected national groups and all labour migrants



Source: The Economic Impact of Migrant Workers in the West Midlands (2007) – The West Midlands Migrant Worker Survey (n=712)

House price trends

Average prices can be tracked over time by postcode, district, county and region (see www.home.co.uk). Reports can display the average property sale price for each type of property in a location for each month from April 2000 to June 2008.

Within Wychavon, the largest increases in house prices has been in Droitwich (see (see Table 31) and the lowest increase has been in Pershore.

Table 31: West Midlands, Worcestershire - House price trends

Area	Average house price June 2008	Percentage change April 2000 – June 2008
Droitwich	£220,000	+140%
Evesham	£182,500	+96%
Pershore	£143,750	+34%
Worcester	£181,004	+112%
Worcestershire	*£203,230*	*+115%*
West Midlands	£153,210	+107%

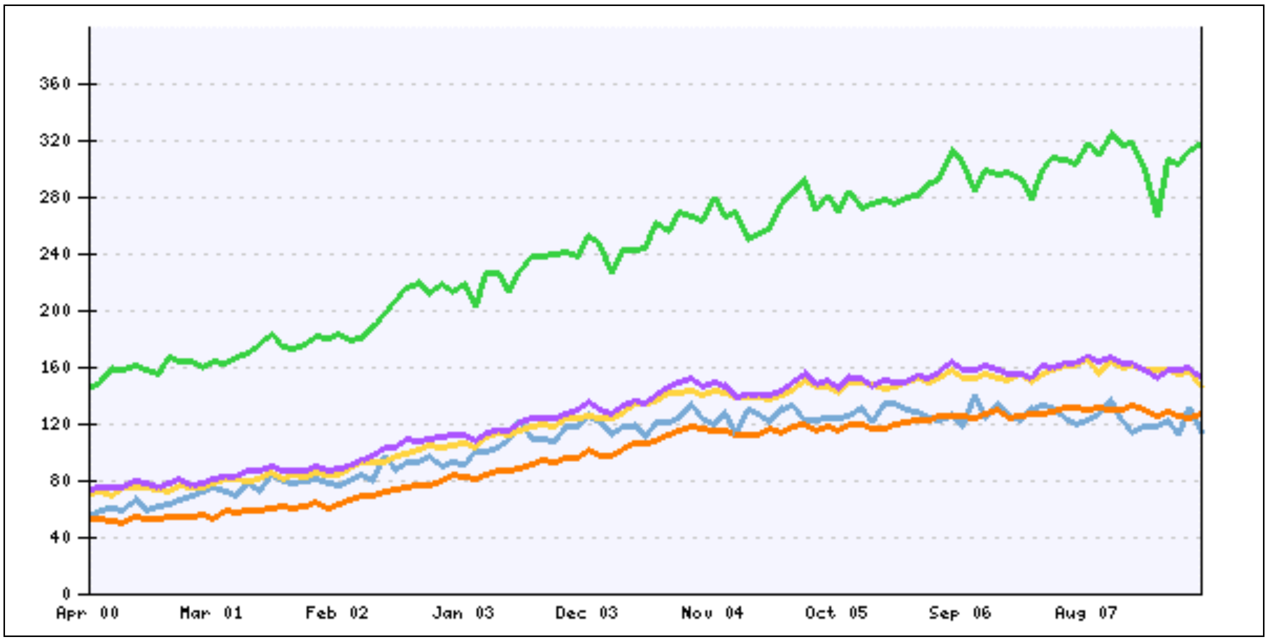
Source: www.home.co.uk

West Midlands

Over an eight year period (April 2000 to June 2008):

- House prices in the West Midlands have increased by 107% on average, where prices have risen from around £74,000 to £153,000.
- The largest increase has been in terraced housing, with a 143% change between April 2000 and June 2008.
- The smallest growth has been for flats at 105%.
- Over the last two years, growth has slowed down, and there have been steady falls in prices of all types of housing with the exception of detached properties.

Figure 28: West Midlands - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£145,475	£318,087	+119%
Semi	£70,971	£147,438	+108%
Terraced	£52,910	£128,434	+143%
Flat	£55,327	£113,676	+105%
All	£73,957	£153,210	+107%

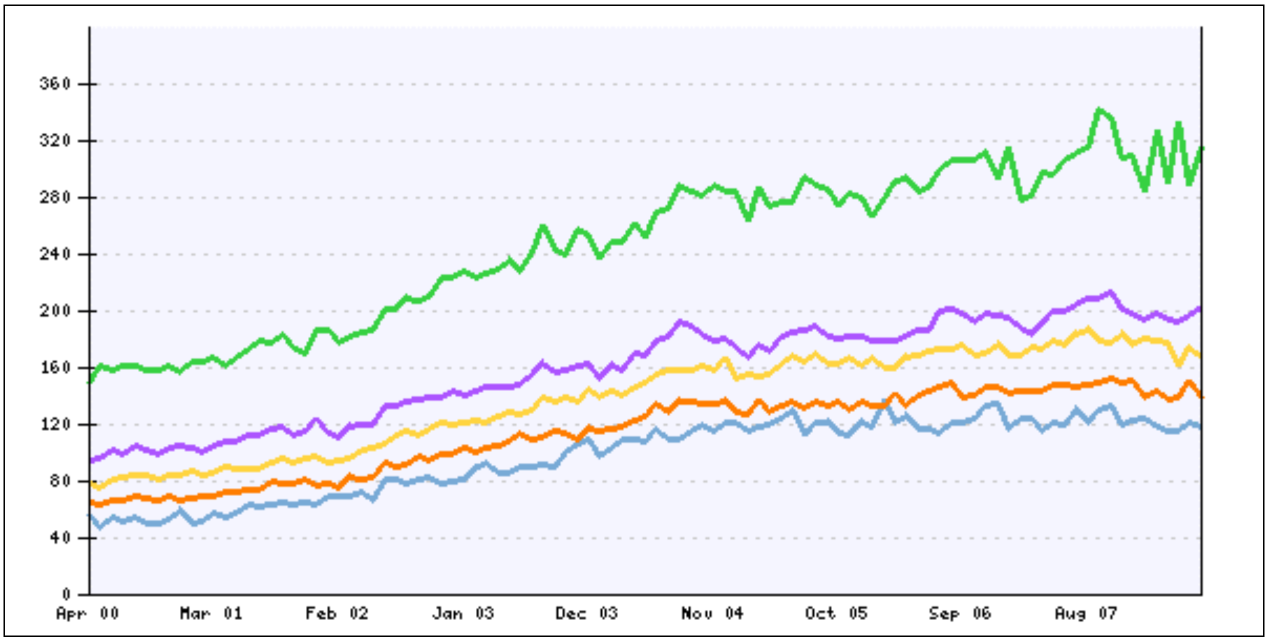
Source: http://www.home.co.uk

Worcestershire

Over an eight year period (April 2000 to June 2008):

- House prices in Worcestershire have increased by 115% on average, where prices have risen from around £95,000 to £203,000.
- The largest increase has been in terraced housing, with a 117% change between April 2000 and June 2008.
- The smallest growth has been for flats at 109%.
- Over the last two years, growth has slowed down, and the market has remained fairly static.

Figure 29: Worcestershire - Average property selling prices (£000's)



		Apr 2000	Jun 2008	Change
	Detached	£149,903	£316,019	+111%
	Semi	£77,820	£168,116	+116%
	Terraced	£64,689	£140,456	+117%
	Flat	£57,015	£118,909	+109%
	All	£94,532	£203,230	+115%

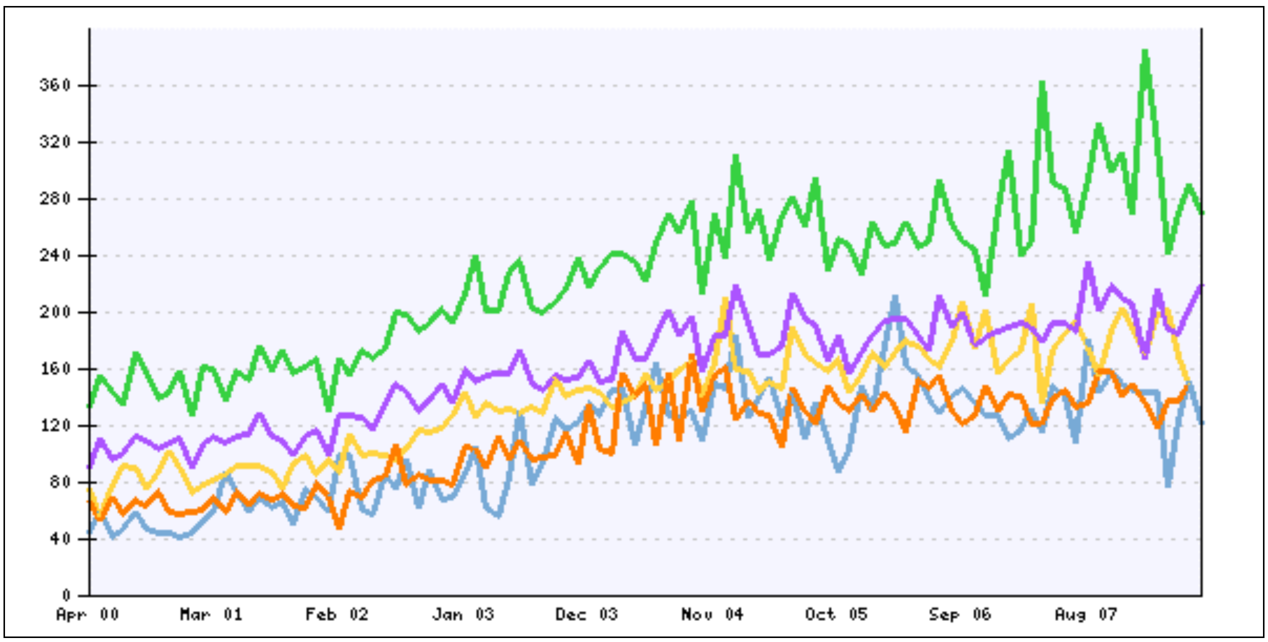
Source: http://www.home.co.uk

Droitwich

Over an eight year period (April 2000 to June 2008):

- House prices in Droitwich have increased by 140% on average, where prices have risen from around £91,000 to £220,000.
- The largest increase, where data is available, has been in flats, with a 172% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for detached housing at 103%.
- Over the last two years, growth has slowed down overall, and the market has remained fairly static, although prices do tend to fluctuate.

Figure 30: Droitwich - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£132,803	£269,000	+103%
Semi	£74,929	-	-
Terraced	£66,158	-	-
Flat	£44,875	£122,000	+172%
All	£91,483	£220,000	+140%

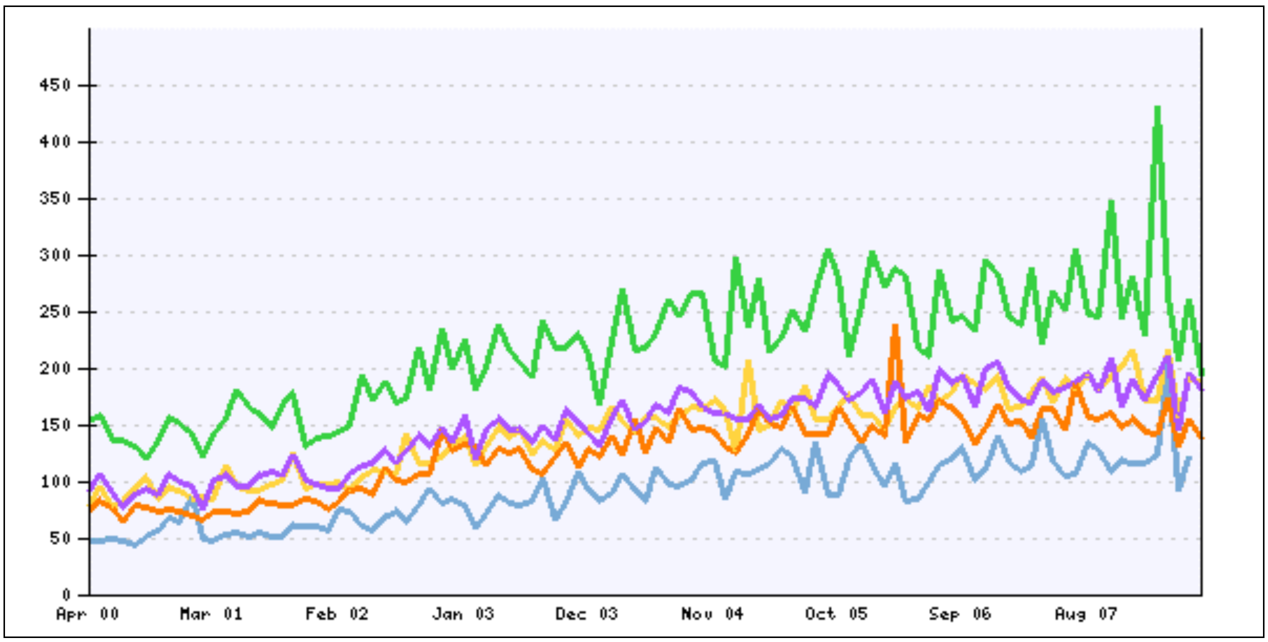
Source: http://www.home.co.uk

Evesham

Over an eight year period (April 2000 to June 2008):

- House prices in Evesham have increased by 96% on average, where prices have risen from around £93,000 to £183,000.
- The largest increase, where data is available, has been in semi-detached housing, with a 140% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for detached housing at 27%.
- Over the last two years, growth has slowed down overall, and the market has remained fairly static, although prices do tend to fluctuate.

Figure 31: Evesham: Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£153,700	£194,500	+27%
Semi	£78,946	£189,333	+140%
Terraced	£74,015	£138,000	+86%
Flat	£49,183	-	-

All	£93,310	£182,500	+96%

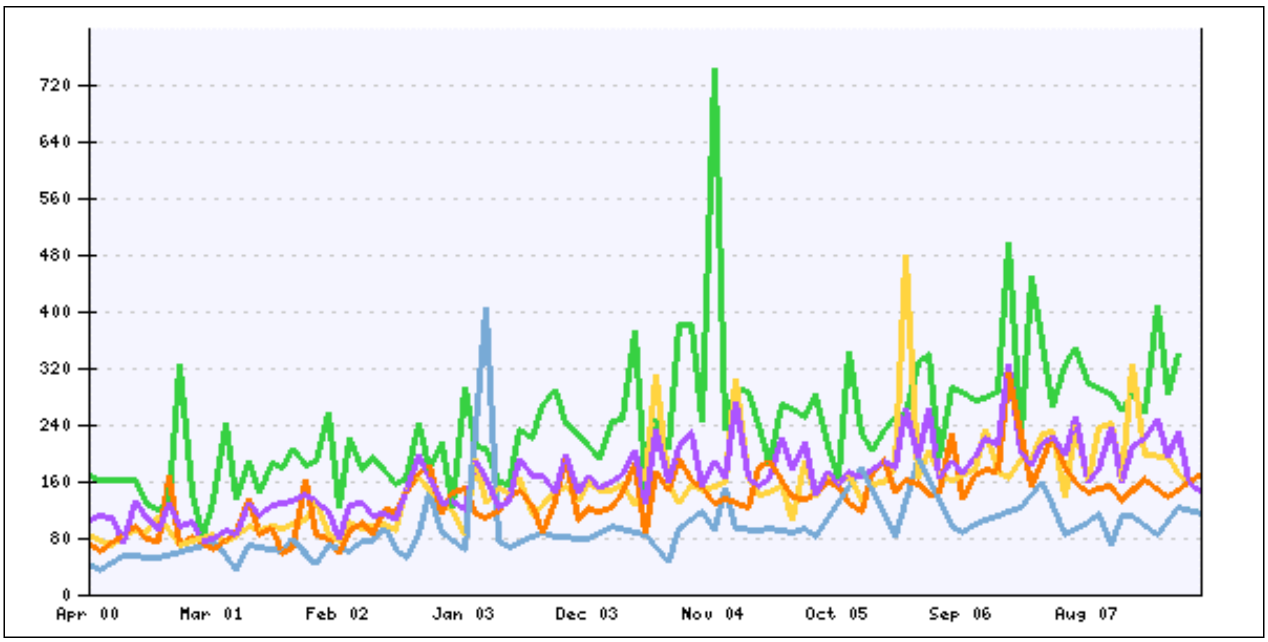
Source: http://www.home.co.uk

Pershore

Over an eight year period (April 2000 to June 2008):

- House prices in Pershore have increased by 34% on average, where prices have risen from around £107,000 to £144,000.
- The largest increase, where data is available, has been for flats, with a 158% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for terraced housing at 132%.
- Prices tend to fluctuate in Pershore, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 32: Pershore - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£168,986	-	-
Semi	£84,890	-	-
Terraced	£74,325	£172,500	+132%

Flat	£44,500	£115,000	+158%
All	£107,115	£143,750	+34%

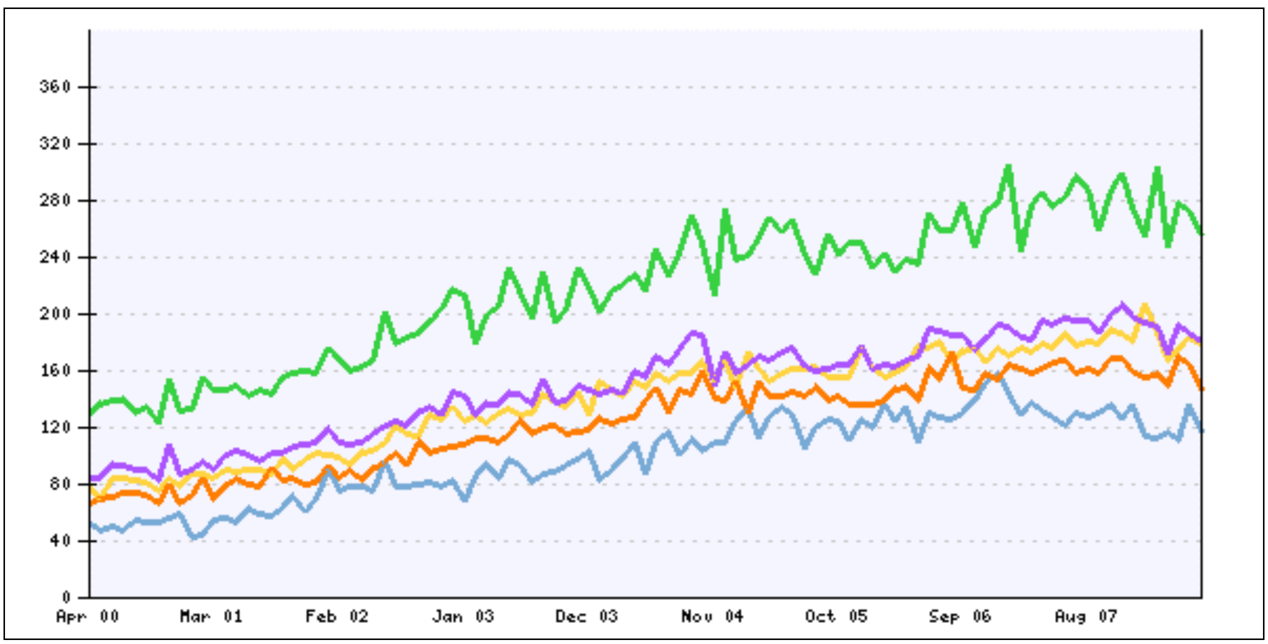
Source: http://www.home.co.uk

Worcester

Over an eight year period (April 2000 to June 2008):

- House prices in Worcester have increased by 112% on average, where prices have risen from around £85,000 to £181,000.
- The largest increase has been in semi-detached housing, with a 131% change between April 2000 and June 2008.
- The smallest growth has been for detached housing flats at 99%.
- Over the last two years, growth has slowed down, and the market has remained fairly static.

Figure 33: Worcester - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£129,450	£257,292	+99%
Semi	£77,468	£179,149	+131%

	Terraced	£66,873	£146,983	+120%
	Flat	£53,007	£117,000	+121%
	All	£85,188	£181,004	+112%

Source: http://www.home.co.uk

The table below (see Table 32) demonstrates that there are concentrations of migrant (A8) employment within the Wychavon District area. In particular there are concentrations in B96 (Redditch) and WR11 (Evesham), which is probably reflective of a number of large employers of migrant workers located within these postcode areas.

Table 32: Wychavon - Postcodes with high concentrations of WRS registrations from May 05 – December 05

Postcode districts with more than 100 WRS registrations	Total
B96 - Redditch area	674
WR11 - Evesham area	640
WR9 - Droitwich area	251
GL20 – Tewkesbury area	237
DY10 – Kidderminster area	198
WR10 – Pershore area	170

Source: The Extent, Size and Characteristics of the Migrant Workforce in the Vale of Evesham, Mercia Research and Strategy

The following figures and tables show the average trend in house prices within the postcodes highlighted above from April 2000 to June 2008.

The table below (see Table 33) summarises the average house price increases in these concentrations:

- WR9 shows the largest average increase (218%).
- B96 and DY10 have the smallest increases (87% and 74% respectively).

Table 33: Wychavon – Average house prices and percentage change by postcode concentrations of WRS registrations, April 2000- June 2008

Area	Average house price June 2008	Percentage change April 2000 – June 2008
B96 - Redditch area	£200,833	+87%
WR11 - Evesham area	£311,250	+168%

WR9 - Droitwich area	£317,110	+218%
GL20 – Tewkesbury area	£249,999	+181%
DY10 – Kidderminster area	£152,750	+74%
WR10 – Pershore area	£270,833	+117%

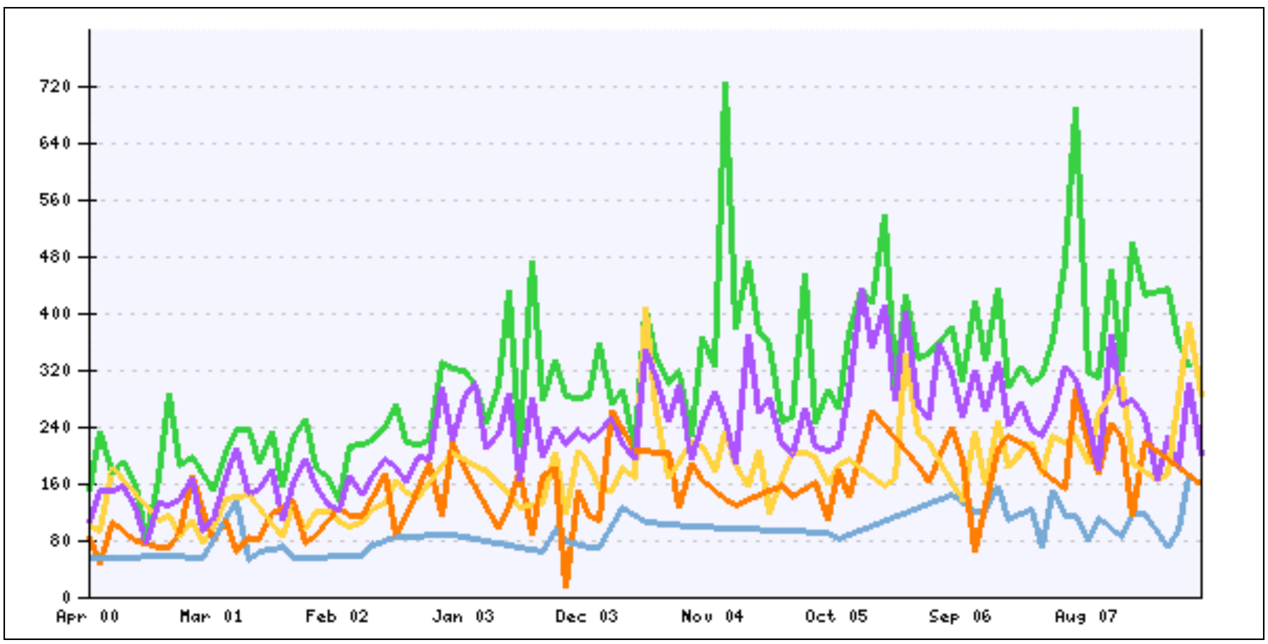
Source: www.home.co.uk

Postcode: B96 (Redditch area)

Over an eight year period (April 2000 to June 2008):

- House prices in B96 have increased by 87% on average, where prices have risen from around £107,000 to £201,000.
- The largest increase, where data is available, has been for semi-detached housing, with a 179% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for terraced housing at 87%.
- Prices tend to fluctuate in B96, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 34: Postcode B96 - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£152,333	-	-

	Semi	£102,250	£285,000	+179%
	Terraced	£85,000	£158,750	+87%
	Flat	£56,250	-	-
	All	£107,375	£200,833	+87%

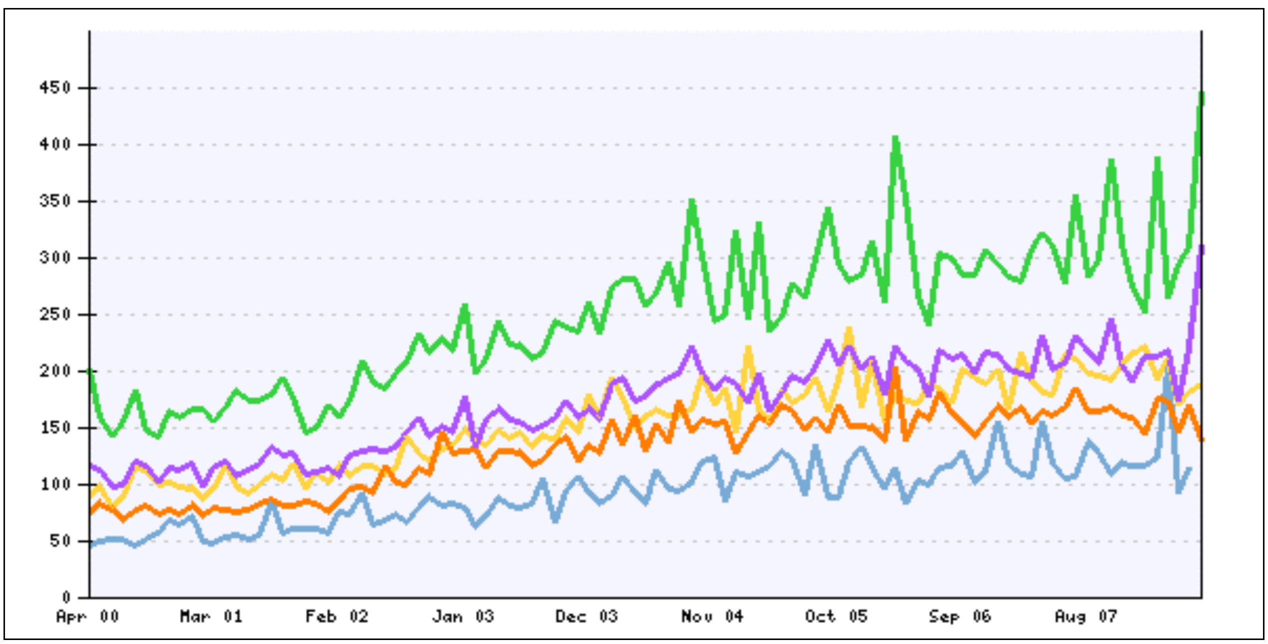
Source: http://www.home.co.uk

Postcode: WR11 (Evesham area)

Over an eight year period (April 2000 to June 2008):

- House prices in WR11 have increased by 168% on average, where prices have risen from around £116,000 to £311,000.
- The largest increase, where data is available, has been for detached housing, with a 121% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for terraced housing at 84%.
- Prices tend to fluctuate in WR11, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 35: Postcode WR11 - Average property selling prices (£000's)



		Apr 2000	Jun 2008	Change

	Detached	£201,815	£446,000	+121%
	Semi	£88,096	£189,333	+115%
	Terraced	£74,910	£138,000	+84%
	Flat	£47,371	-	-
	All	£116,095	£311,250	+168%

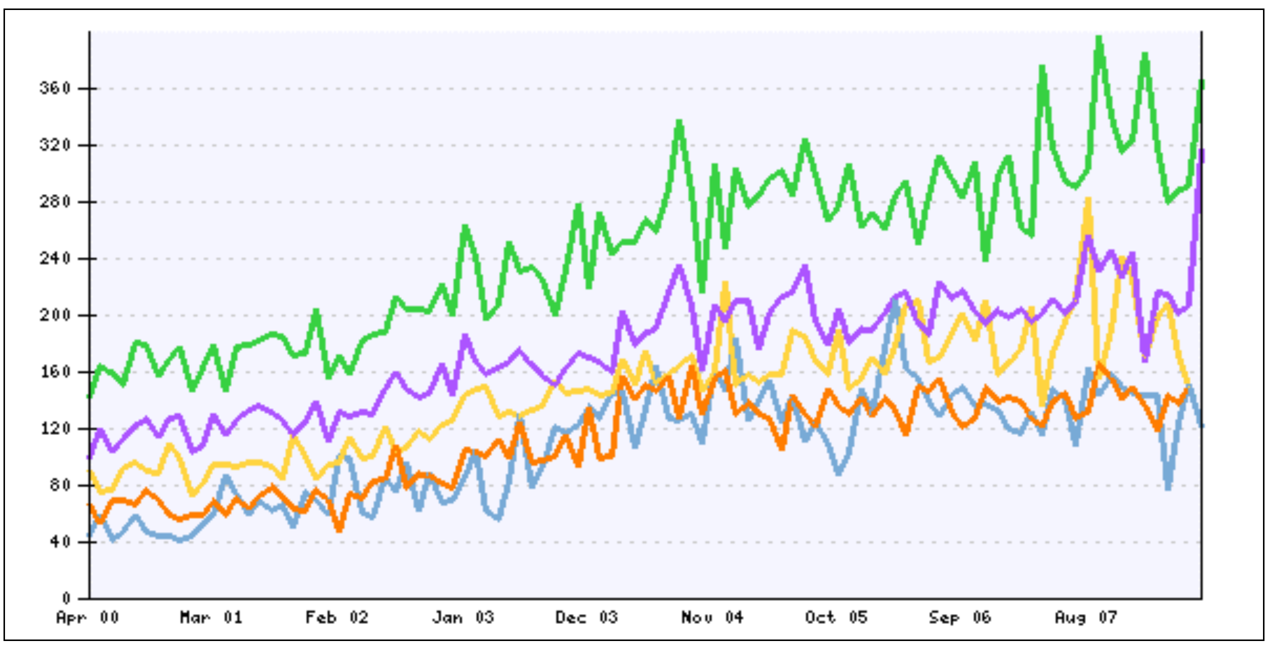
Source: http://www.home.co.uk

Postcode: WR9 (Droitwich area)

Over an eight year period (April 2000 to June 2008):

- House prices in WR9 have increased by 218% on average, where prices have risen from around £100,000 to £317,000.
- The largest increase, where data is available, has been for flats, with a 171% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for detached housing at 157%.
- Prices tend to fluctuate in WR9, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 36: Postcode WR9 - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£142,326	£365,888	+157%
Semi	£90,783	-	-
Terraced	£65,986	-	-
Flat	£45,100	£122,000	+171%
All	£99,731	£317,110	+218%

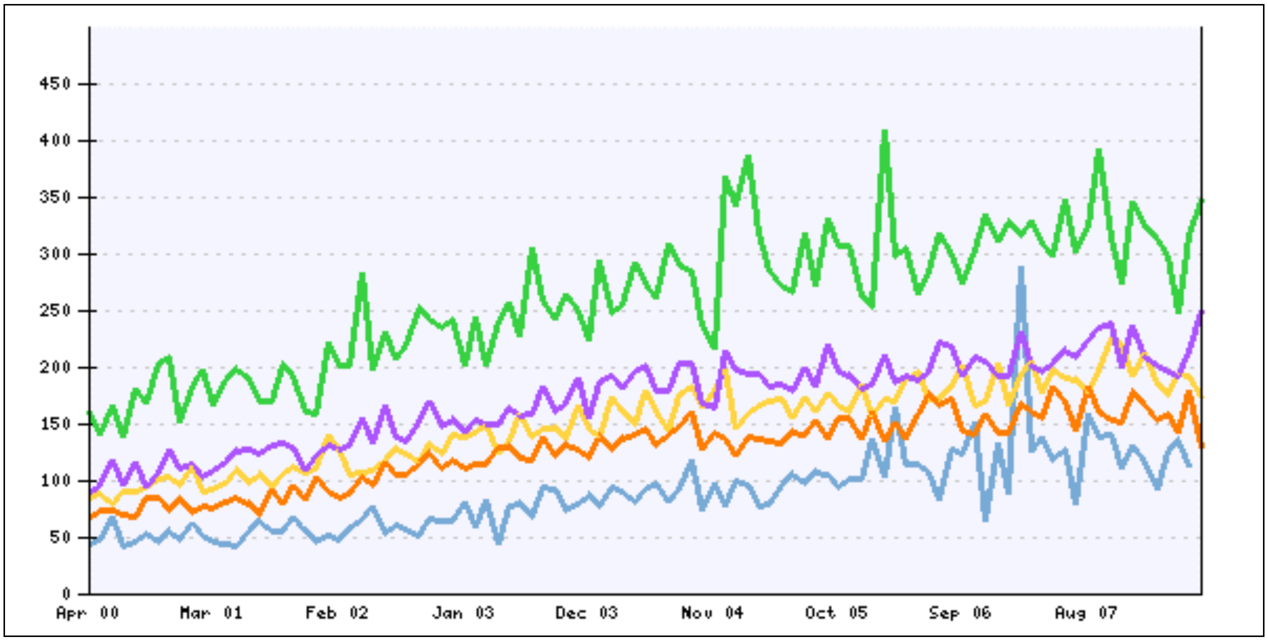
Source: http://www.home.co.uk

Postcode: GL20 (Tewkesbury area)

Over an eight year period (April 2000 to June 2008):

- House prices in GL20 have increased by 181% on average, where prices have risen from around £89,000 to £250,000.
- The largest increase, where data is available, has been for detached housing, with a 115% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for terraced housing at 94%.
- Prices tend to fluctuate in GL20, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 37: Postcode GL20 - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£161,992	£347,500	+115%
Semi	£84,785	£175,000	+106%
Terraced	£66,900	£129,995	+94%
Flat	£44,525	-	-
All	£88,920	£249,999	+181%

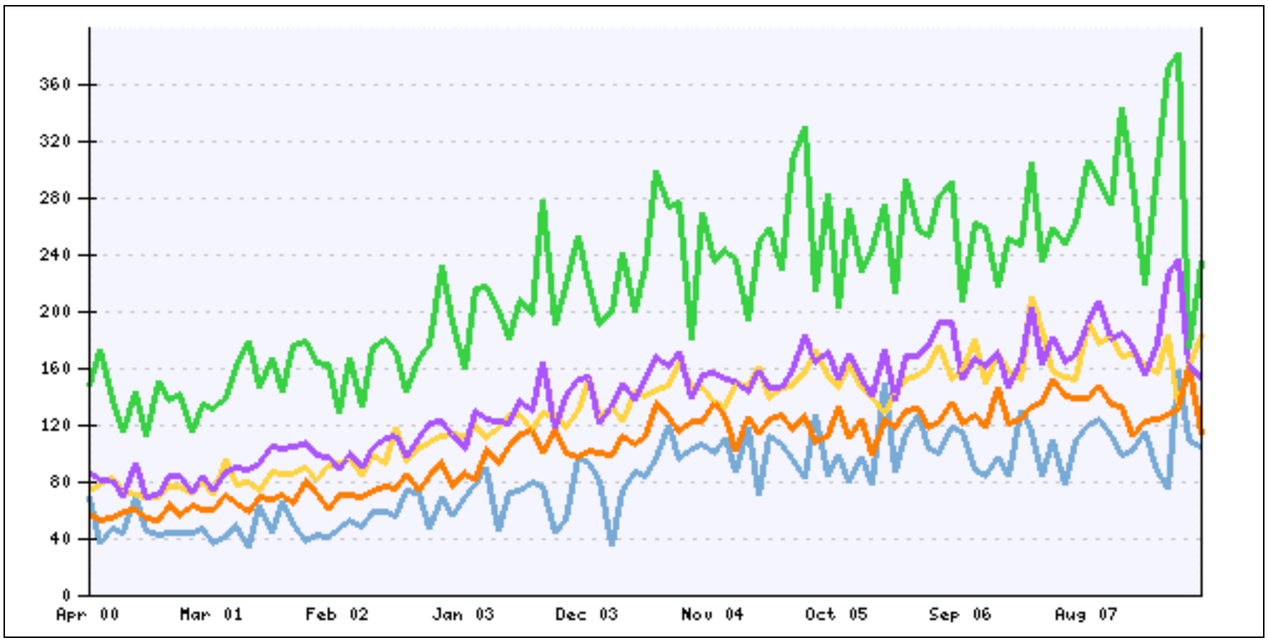
Source: http://www.home.co.uk

Postcode: DY10 (Kidderminster area)

Over an eight year period (April 2000 to June 2008):

- House prices in DY10 have increased by 74% on average, where prices have risen from around £88,000 to £153,000.
- The largest increase has been for semi-detached housing, with a 146% change between April 2000 and June 2008.
- The smallest growth has been for flats at 50%.
- Prices tend to fluctuate in DY10, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 38: Postcode DY10 - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£148,363	£236,000	+59%
Semi	£74,279	£183,000	+146%
Terraced	£58,034	£113,500	+96%
Flat	£69,987	£105,000	+50%
All	£88,001	£152,750	+74%

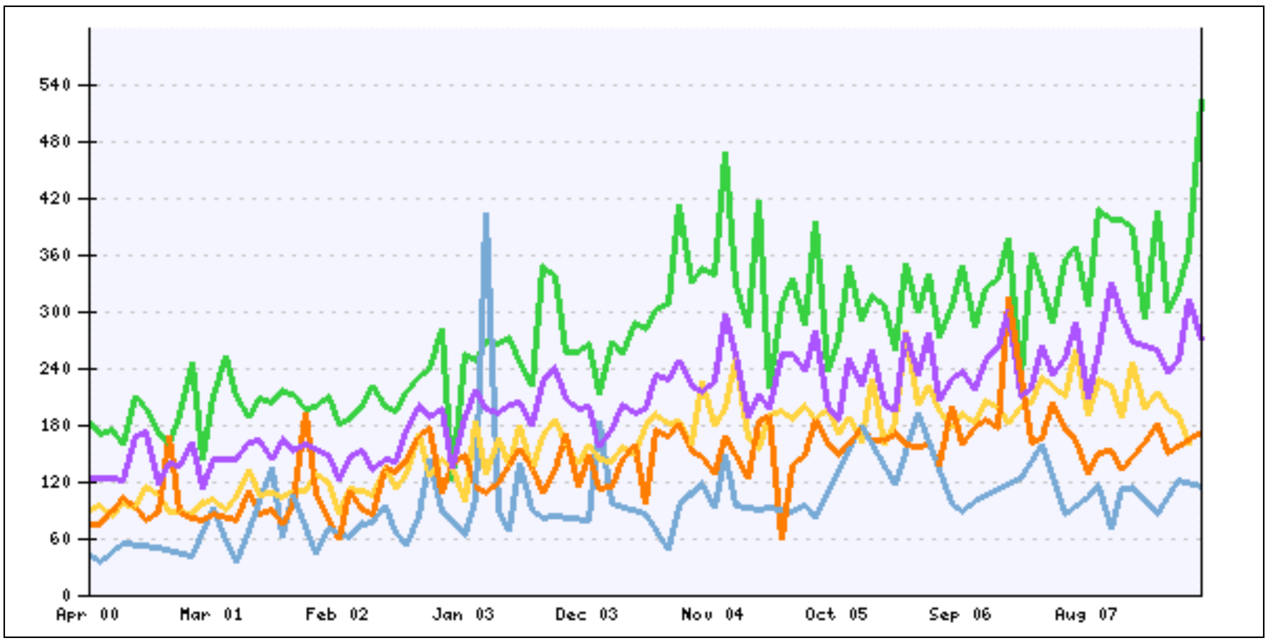
Source: http://www.home.co.uk

Postcode: WR10 (Pershore area)

Over an eight year period (April 2000 to June 2008):

- House prices in WR10 have increased by 117% on average, where prices have risen from around £125,000 to £271,000.
- The largest increase, where data is available, has been for detached housing, with a 189% change between April 2000 and June 2008.
- The smallest growth, where data is available has been for terraced housing at 126%.
- Prices tend to fluctuate in WR10, mainly due to the fact that being a smaller area, the numbers of properties coming on the market will be lower.

Figure 39: Postcode WR10 - Average property selling prices (£000's)



	Apr 2000	Jun 2008	Change
Detached	£181,886	£525,000	+189%
Semi	£91,378	-	-
Terraced	£76,279	£172,500	+126%
Flat	£44,500	£115,000	+158%
All	£124,742	£270,833	+117%

Source: http://www.home.co.uk

Current housing build

The following tables (Tables 34a to 34b) show current house building within Worcestershire and the districts by tenure.

- Between 2007/08 there have been 373 dwellings either started or completed within Wychavon.

Table 34a: Worcestershire & the Districts – House building: permanent dwellings *completed* by tenure, 2007/08

	Dwellings completed			
	Registered			
	Private enterprise	Social landlords	Local authority	All
Worcestershire	**1,450**	**160**	**-**	**1,610**
Bromsgrove	121	42	0	163
Malvern Hills	111	7	0	118
Redditch	247	3	0	250
Worcester	241	27	0	268
Wychavon	139	30	0	169
Wyre Forest	143	25	0	168

Source:
www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/locallevelstatistics/livetables

Table 34b: Worcestershire & the Districts – House building: permanent dwellings *started* by tenure, 2007/08

	Dwellings started			
	Registered			
	Private enterprise	Social landlords	Local authority	All
Worcestershire	**1,640**	**220**	**-**	**1,860**
Bromsgrove	134	71	0	205
Malvern Hills	167	12	0	179
Redditch	69	10	0	79
Worcester	366	11	0	377
Wychavon	193	11	0	204
Wyre Forest	307	27	0	334

Source:
www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/locallevelstatistics/livetables

5. Health profile basics

A study of the characteristics of the migrant workforce in the Vale of Evesham by Mercia Research and Strategy found that there was an increasing number of treatment of individuals within the MIU (Minor Injuries Unit) in Evesham and a general practice in recent years, especially migrant workers:

> "The main nationalities the MIU reported treating are eastern Europeans, in particular Polish, and white South Africans. The practice believed the rise in their overseas patient registrations are due to the employment practices of some large local agricultural and food processing businesses. The MIU stated that many of the people coming in for treatment are working in the agricultural and food processing sector".

The question is whether to direct more services to healthcare or in improving working practices.

The report goes on to say that:

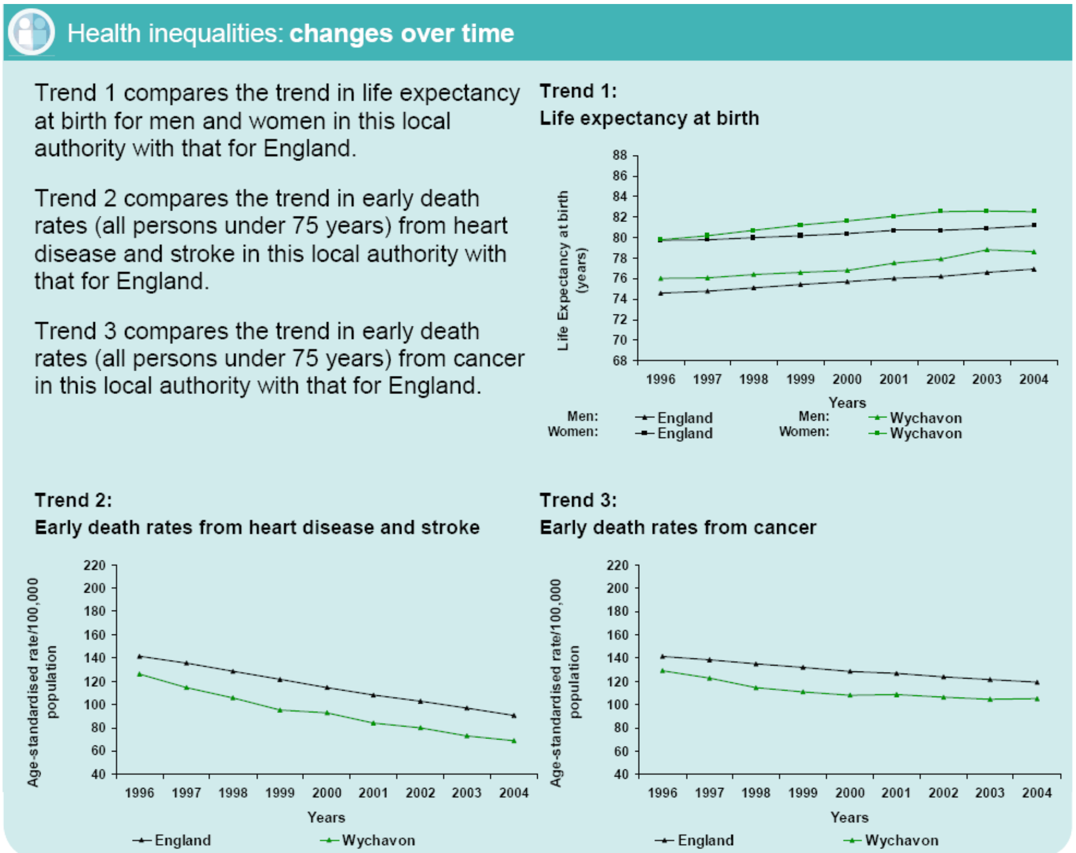
- 170 males and 81 females were treated by the MIU between January 2004 – September 2005.
- 64% (109) of all males were treated for work related accident injuries, but only 26% (21) of all females came into the MIU for this reason. Females were much more likely to be using the MIU to access contraception and for other female health issues.
- 56% of males and 50% of females seen by the MIU were not registered at a local general doctor's practice.

Recent focus group research for Wychavon District Council gives indications that local doctor registrations may have increased in the last two to three years. 75% of Polish workers taking part in the research indicated that they are registered with a local GP.

A report by the APHO and Department of Health in 2007 provides a snapshot of health in the Wychavon area (see Figure 40). Compared to the national average:

- Life expectancy at birth is higher for both men and women in Wychavon.
- Early death rates from heart disease and strokes are lower in Wychavon.
- Early death rates from cancer are lower in Wychavon.

Figure 40: Wychavon - Health profile



Source: APHO and Department of Health, 2007

6. A8 Economies basic data

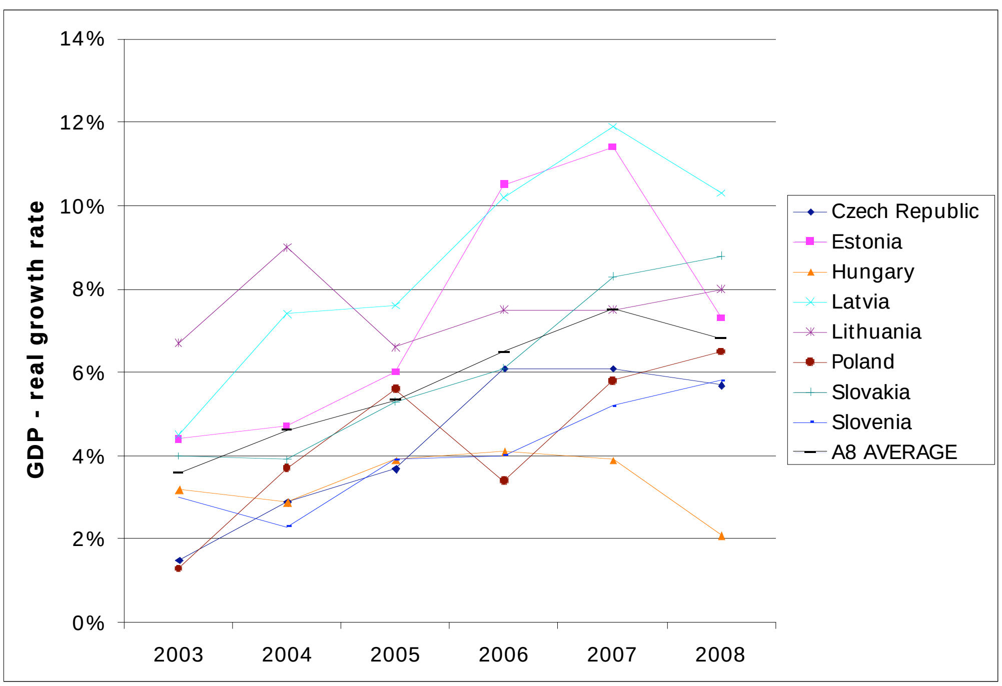
GDP

One of the key reasons for migrant inflow has been the state of the economies. Traditionally within A8 countries average GDP growth rates have been fairly low and unemployment high, particularly in Poland and Slovakia.

The general trend recently, however, is for rising GDP real growth rates overall (see Figure 41 and Table 35).

- Latvia, Slovakia and Estonia currently have GDP real growth rate higher than the overall A8 average.
- There have been falling real growth rates within the last year for the Czech Republic, Estonia, Hungary and Latvia, the drop being most noticeable in Estonia (a 4.1% decrease).

Figure 41: A8 countries - GDP real growth rate, 2003 - 2008



Source: CIA World Factbook

Table 35: A8 countries - GDP real growth rate, 2003 - 2008

GDP - real growth rate	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Poland	Slovakia	Slovenia	A8 AVERAGE
2003	1.5%	4.4%	3.2%	4.5%	6.7%	1.3%	4.0%	3.0%	3.6%
2004	2.9%	4.7%	2.9%	7.4%	9.0%	3.7%	3.9%	2.3%	4.6%
2005	3.7%	6.0%	3.9%	7.6%	6.6%	5.6%	5.3%	3.9%	5.3%
2006	6.1%	10.5%	4.1%	10.2%	7.5%	3.4%	6.1%	4.0%	6.5%
2007	6.1%	11.4%	3.9%	11.9%	7.5%	5.8%	8.3%	5.2%	7.5%
2008	5.7%	7.3%	2.1%	10.3%	8.0%	6.5%	8.8%	5.8%	6.8%

Definition: This entry gives GDP growth on an annual basis adjusted for inflation and expressed as a percent. Source: CIA World Factbook

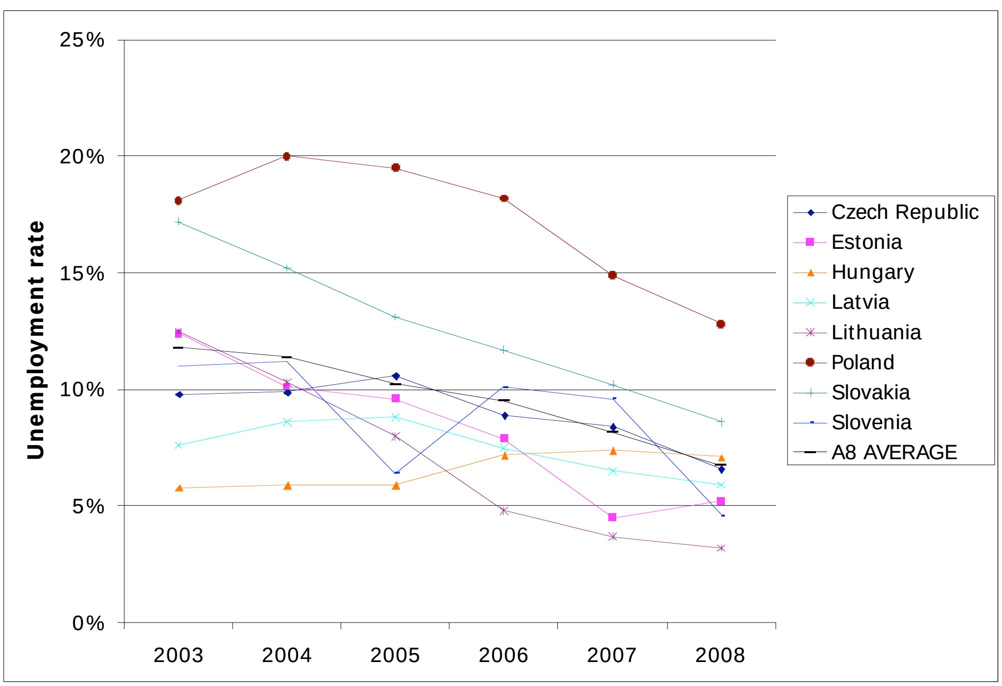
Unemployment rates

The following figure (see Figure 42) and table (see Table 36) plots the unemployment rates for each of the A8 countries since 2003.

The general trend is falling unemployment rates amongst the A8 countries overall.

- Compared to the other A8 countries the unemployment rate in Poland is consistently higher, and is still currently higher than the A8 average by 6 per cent.

Figure 42: A8 countries - Unemployment rate, 2003 - 2008



Source: CIA World Factbook

Table 36: A8 countries - Unemployment rate, 2003 - 2008

Unemployment rate	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Poland	Slovakia	Slovenia	A8 AVERAGE
2003	9.8%	12.4%	5.8%	7.6%	12.5%	18.1%	17.2%	11.0%	11.8%
2004	9.9%	10.1%	5.9%	8.6%	10.3%	20.0%	15.2%	11.2%	11.4%
2005	10.6%	9.6%	5.9%	8.8%	8.0%	19.5%	13.1%	6.4%	10.2%
2006	8.9%	7.9%	7.2%	7.5%	4.8%	18.2%	11.7%	10.1%	9.5%
2007	8.4%	4.5%	7.4%	6.5%	3.7%	14.9%	10.2%	9.6%	8.2%
2008	6.6%	5.2%	7.1%	5.9%	3.2%	12.8%	8.6%	4.6%	6.8%

Definition of Unemployment rate: This entry contains the percent of the labour force that is without jobs. Substantial underemployment might be noted. Source: CIA World Factbook

A local concern within Wychavon has been the potential exodus of migrants back to their own country, especially those originally from Poland - as they form the largest majority over 70 per cent of the local A8 workforce.

The recent trends in Poland show increasing GDP real growth rate and falling unemployment. The trend and migrant movement patterns need to be tracked over time.

Exchange rates

The current value of each of the A8 currencies against the UK £ could also well have a significant impact on what migrant workers decide to do in the future. They could, for example, decide to:

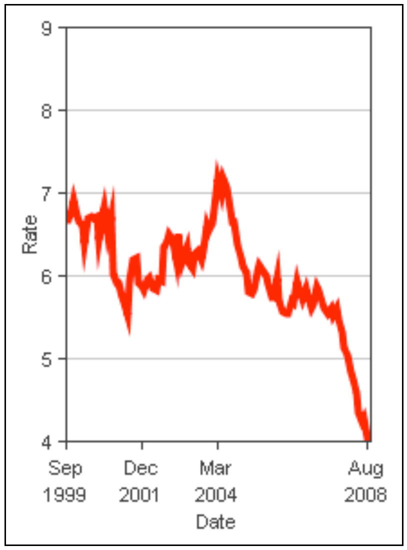
- Go back to their home country as the economy has picked up there.
- Wait and see what happens in the short-term.
- Stay longer in the UK for the long-term till things pick up.

The figures reported earlier for approved applications, however, show that the numbers have remained fairly static over the last year.

Poland

The following chart overall shows a steady and then rapid decline in the value of the Polish Zlotny compared to UK £. As of 1st August 2008, the value of the Zlotny was 4.0497 to UK £, this compares with 5.417 from a year earlier – a decrease of about a third (33.7%). In other words the value of earnings has gone down.

Figure 43: Poland - Value of Polish Zlotny vs. UK £, September 1999 – August 2008



Source: http://www.uktradeinfo.com/index.cfm?task=exchange&lastcountry=poland

Slovakia

A similar picture has been happening in Slovakia. As of 1st August 2008, the value of the Slovakian Koruna was 38.2143 to UK £, this compares with 49.0068 from a year earlier – a decrease of around 28%.

Skills shortages in other EU countries

In 2004, along with Ireland and Sweden, the UK opened its borders to the A8 countries. They gave workers from these countries the freedom to live and work almost without any restrictions. At the time, the other EU member countries imposed a seven-year delay on allowing such workers into their countries, as they were concerned about a potential flood of poor central and eastern European workers keen to make a better living for themselves.

The three countries that lifted restrictions on labour mobility have seen their economies grow more and more jobs have been created because migrant workers have essentially filled skill shortages in construction, processing, restoration, and many other services.

Key economies such as Germany, France and Spain are soon likely to ease the restrictions on such workers. Economic upturns in these countries over recent years has caused skills shortages. Attracting workers from countries such as Poland could have a significant impact on the number of future workers entering the UK. For example, it would be a lot easier for Polish workers to enter a neighbouring country than traveling across Europe to reach the UK.

7. Local interviews: Key themes, issues and impacts

Background

As part of the project we interviewed a group of stakeholders on the phone, so that we could put a more local and up to date overlay onto the data and other trends we identified from analysis of the wide range of data sources. The main focus of the interview was to:

- Identify how reliant on / important migrant workers were for local employers and the local economy in general
- Discuss benefits, trends and any issues in employing migrant workers
- Explore why migrant workers might return home in significant numbers, and what the impacts of such a change might be
- Consider options for addressing future need for migrant workers

Whom we spoke with

Wychavon District Council provided us with contact details for 12 organisations in the local area. We were able to arrange telephone interviews with 9 of them. In the case of the remaining three : at one organisation the most relevant person was away for over two weeks; one we were unable to contact despite phoning 4 or 5 times; the third we scheduled a possible conversation but for late August.

The organisation we spoke with were a mix of local employers – mainly in the food sector and more general stakeholders.

Organisation	Interviewee
Business Link	David Ledbury
Chamber of Commerce	Christopher Harvey
Doncaster Precision Engineering	Liz Peel
Evesham College	David Blades
Kanes Foods	Claire Ainsworth
Learning and Skills Council	James Davison
Local Catholic Church	Father Christopher Draycott
Organic Farm Foods	Carol Higgins
Red Star Growers	Chris Simms

The interviews took place between August 5th and August 13th , and lasted about 20 minutes. A copy of the outline topic guide can be found at the end of this section. All comments are anonymous, although we have numbered the respondents to differentiate.

A sincere thank you

We would like to thank all the people we spoke with for their time and comments; we recognise that they are all very busy people and are grateful to them for their contribution.

Importance of migrant workers in the local economy

The role of migrant workers in the local economy is seen as significant- both at the company level and for the economy as a whole.

Table 37 below, sets out a compilation of data on how respondents rated the significance of migrant workers and the potential impact of losing various percentages of them.

For three of the four employers, local migrant workers represented between a quarter and three quarters of the full time workforce and all their seasonal workers for two employers. We asked the four employers to rate their own reliance on migrant workers on a scale of 1-5, where 1 represented not very significant and 5= Very significant. All scored their reliance as either 4 or 5.

Among the other stakeholders we asked them to rate the reliance of the local economy as a whole on migrant workers. Here the scores were more varied ranging from 2 to 5.

Table 37: Wychavon - Reliance on migrant workers

Respondent*	Total employees	Migrant workers	Seasonal / agency Migrant workers	Significance for co. / local economy**
E	500	120	-	5 / co
E	40	7	50-60	4 /co
E	6-8 FT		350	5 /co
E	1200	900		5 /co
C	-	350 Students		3 / Col 4/ Ec
St	-	-	-	3 / Ec
St	-	-	-	2-2.5 / Ec
St	-	-	-	2 / Ec
St	-	-	-	4-5/ Ec

*E= Employer; C=College; St = General stakeholder

** /co = Impact on company /Ec= Impact on local economy

Local impacts

Most of the comments about impacts locally were positive, although several people had heard 'mutterings' or occasional complaints.

> *They are contributing to the local economy… rent, shopping, food… R1*
>
> *The economy in the Vale of Evesham has benefited immeasurably by the arrival of these young willing workers… R2*
>
> *… there has been no evidence of wage rate suppression or deflation… R4*
>
> *… Not so much benefit to the local community from spending, because most of their money goes home…. R3*

Some local muttering, but little real negative reaction.

> *We have occasional complaints from employees about health care or housing e.g. if Polish lady arrives pregnant…. Some are wary locally if there is a large influx… R1*
>
> *Sometimes people don't like it if 'four young men' move in next door instead of a family.... but anecdotally you also hear of village schools kept open as a result of the migrants… R4*
>
> *There are one or two problems with drink or drugs… but nothing much…. They tend to stay together form rather closed communities… local people can be rather parochial and anti foreigners… but I have never heard any real problems… R2*
>
> *.. you hear occasional comments in the community that 'it is turning into Poland'.. but I see very positive benefits… R7*

Housing was not seen as a major issue. The local rented housing stock they felt had perhaps improved because it was now being used; most people found their own housing and were happy to share; for other employers they provided accommodation over the summer so there was no issue.

Why do they use migrant workers?

The general perception of the A8 migrant workers – whether full time employees or seasonal workers – was very positive. Quality of staff, reliability and work ethic were the main benefits.

> *We needed to fill a gap in the workforce …. we had laid people off in 2001… and needed to replace them quickly in about 2004…. They are terrific…. They do anything you ask, they work overtime, they turn up they are very rarely absent…I have given up on the local job centre… the people are unemployable you go through the motions, and if they start they leave after a few weeks … I think they are just doing it to tick the boxes for the Job Centre…. R1*
>
> *They are normal good staff… R5*

…. 80% I'd say are Polish… some Slovenia and some Latvian…. Some have been here for 4 years now they come and stay several are now in key positions… they are often highly qualified… R7

… there was a rumbling issue across all sectors of the economy and all company sizes about the difficulty of recruiting…. Employers locally are very pleased they are able to get the right kind of workers….the work ethic is excellent… if they finish a task they ask what else can I do… or are team players and ask can I help…R8

… they want to work… English students don't.. they re young, educated speak English… flexible.. . R6

.. some are definitely over skilled for the work so better workers… R2

How do they find migrant workers?

The employers use different approaches to finding migrant workers.

Word of mouth has become an important aspect of recruitment with current or previous workers recommending the company to their friends, or if a job is advertised internally asking if a friend can apply.

… applicants are often known to someone in the company, yes word of mouth is important… R5

They find us…. Word of mouth… we put up jobs internally first or they will ask if we have got anything for a friend who is coming….. we don't advertise any more.. we have about 60 – 70 waiting…. R7

.. it creates its own momentum…. The critical mass keeps it going now… was serendipity at the start perhaps…. we were where the jobs were… but then they settled and tell others… R4

Word of mouth is important .. it has helped us a lot.. same people come or their friends too… R6

We had some very keen ones at the beginning and then they had contacts with mates back home… once the first came and got established it encouraged the others…. R1

Gangmasters were not particularly popular. People want to have a regular and employed workforce which is more reliable.

For summer seasonal workers we use Concordia… give them accommodation and other support… R6

There is a move away from casual labour to accredited schemes and students.. also fewer from the West Midlands now more from the EU… R8

We don't touch Gangmasters… we don't want to delegate or lose control.. quality and reliability would be n issue too… R1

Implicit in these and other comments was also a general emphasis on providing regular, full time employment – even if short term, rather than relying on casual labour.

Impact if migrant workers returned home

We explored the potential impact both to the company – when talking to employers, and the local economy if migrant workers began to return home in significant numbers, or if there was a significant drop in the numbers arriving.

While most respondents felt that a 10% reduction would have a significant impact both on their own business and the local economy, they felt that there were possibly alternative solutions. The thought of a 30% or 50% reduction was met with some consternation and recognised as having a very significant effect on their own business and the local economy.

Any significant drop was seen as having knock on effects and impacts across the local economy, with loss of business, crops left in the ground, outsourcing of work elsewhere away from the area and ultimately business failures.

Table 38 below summarises the numerical impact of a 10% 30% and 50% fall in migrant workers where 1= very little and 5 = very significant. Even a 10% drop was significant – given a 3 - for the companies we spoke with. The impact for the wider economy was estimated lower mostly only given a 2. Not surprisingly, the greater the percentage, the higher the impact for companies and the economy.

Table 38: Wychavon - Impact of losing migrant workers

Impact of losing % of migrant workforce			
	10%	30%	50%
E	3 /co	4 /co	5 /co
E	3 /co	4 /co	4+ /co
E	3 /co	4 /co	5 /co
E	4 /co 3-4 Ec		5 /co
C	2	3-4	5
St	2	3	
St	2-4	3-4	5
St	2	3	4
St	3-4	4-5	5+

Many are here for a gap year and there is a significant revolving door that maintains supply as many leave and others come.

Even if companies were able to replace them, which was seen as likely to be difficult, the quality may not be the same.

> *10% we would have immediate problems… we have shifts etc…we would have to work smarter but it would certainly be an issue; … R1*

> *10% we managed before… so possibly, but would struggle… …anecdotally people are saying that people are returning… companies will struggle to replace them certainly that level of workforce with that commitment… R3*

If the Poles go and others from elsewhere come in through the revolving door may be negative… the 'rumour ' is that they are not such good workers from Romania and Bulgaria so again, some downturn… R8

They represent a good workforce.. the Vale of Evesham would certainly suffer with no SAWS… the question is whether we could replace them from the workless now.. if not a very negative impact but more may come if it was just 10%... R4

There just aren't the people locally… it would have a huge impact on the local economy you only have to see.. the local bank ahs a Polish person Tesco's. 10% we'd all notice – we would advertise direct in Birmingham and bus in.. wouldn't touch the gangmasters… or we might advertise in Poland or elsewhere or even try South Africa and Portugal again… R7

.. people may use gangmasters… but they will not be so good less consistent more checks will be needed… R6

Some sectors or areas may be hit harder than others.

For local companies whose business is local such as hospitality, it would be very significant.. even at 10% some smaller ones would probably go out of business… R8

Larger companies have more options such as subcontracting elsewhere or outsourcing abroad.. but if food processing went elsewhere it would also take the food production and farming too because they would want local suppliers elsewhere too… R8

… some sectors would be hit very badly… horticulture or food they could well alter.. but depends we might see a return of the gangmasters or have people bussed in from Birmingham… R2

The local economy is already suffering… leaving crops in the ground because of quotas it is already hitting the Vale of Evesham.. R5

30% or 50% would cause serious pain to individual companies and the local economy.

At 50% we would have to cut our cloth accordingly.. grow less or harvest less.. would cause us significant drop in turnover and profits… R6

50% - oh golly… I dread to think .. .. potentially really serious consequences … it is very difficult to get good people …. R1

30% would be much more serious should be planning for a contingency and 50% serous trouble… would probably not happen that quickly, so companies need to keep watch… R3

Any loss would be significant… we are very constrained locally because of full employment… some might be able to use gangmasters but not all… would reduce the local economy… R9

30% it would start to hurt…. And 50% would be very significant for us … but most come and go anyway… it is a revolving door.. they want to improve their employability back home… R9

A significant drop may have a knock on effect in terms of conditions and rates of pay if employers have to try to attract local people…. R5

… we would probably se the return of the gangmasters and go back to traditional sources in the Black Country, the Traveller community … but not for many of the jobs around now… R

What might cause migrant workers to return home?

We asked an open ended question about why A8 migrants might return home to which people universally responded with variations on a theme of 'it no longer being worth while staying'. A combination of factors were mentioned as contributing to this – rising cost of living in the UK; shift in the exchange rate reducing the positive trade off; more opportunities in growing economies back home.

The exchange rate plus what happening at home R1

Oh… the cost of living…. The money in their pockets …. what you might call the comfort factor of how wealthy they feel… R2

.… the strength of their own currency the exchange rate if it goes down against the pound … plus if there are then more opportunities at home Possibly the credit crunch but mainly agriculture round here not construction so not really… R3

.. it would be the economic balance… is it still worth coming or staying here versus Poland or wherever… R5

One word: money… the exchange rate, is it worth it or is it better at home now…R6

The Polish: pound etc exchange rate and the economy… is life here still better or more opportunities there now. They come for a better life, if that stops, they'll go…. R7

It would probably be a combination… attitudes – if people were hostile and a lack of warmth plus the economic prosperity dropping here or rising at home… R8

… the main one would be economic opportunities elsewhere because of growth back home … plus they would be better placed to get jobs with more skills … R9

The comfort factor - local intolerance and antagonism, while not felt to be an issue, would provide an additional impetus, especially if people were lonely and missing family and friends.

Antagonism I think used to be a lot worse…. Stories about people eating swans and things… think it was 'growing pains' less now. R4

Other issues such as the downturn in construction or floods were not seen as particularly important overall, but again likely to make people return home rather than seek new work here.

No not floods, that was a one off they'd just go again…. And if there's a construction downturn they'll just go I think…. R1

Floods… would be off-putting, but it is really the economy. R3

… floods, they would just move on elsewhere… R4

A construction downturn, they might stay depends why they are here… R5

The opening up of Germany, France and Spain to A8 workers was not considered particularly important, but might contribute to some loss of inflow. English was seen to continue to be a positive counter-balance. Again, economic opportunity would probably be the deciding factor, but other countries also had 'history'; with migrant worker populations.

Germany France etc possibly, but not really … R5

Germany Spain and France opening up may have an effect .. they have always been more inclined to see the EU as a single market although their economies are not without their tensions on migrant workers…there are underlying tensions there too… R8

Some are definitely staying

Significant numbers are however here to stay – if not for ever, then certainly for more than a few months.

As already indicated, for the companies we spoke to the migrant workers were part of their full time, permanent work force. Some had been here for 4 years.

There are about 29 children locally… I suppose abut 10 – 15 families… they are incredulous when they find out that education is free… some will stay because of that… R2

Most are now settled so not really migrant… they have mortgages about 25% have families – Mum and Dad came first then the families followed…R7

About 10% of the students are settled…… long term I think more will stay… in decades to come we will talk about people being part of the generation who came in the early 2000s … R9

Recommendations to people today, from 10 years out?

We also asked people to imagine they were in a position of power in 10 years time, what recommendations they would make to people today – in companies local authorities or national governments in order to maintain adequate flow of migrant workers.

Training was an important factor, treating people as proper full time employees and developing their skills as a way to encourage them to come.

… be a 'good employer'… invest in the people who come, value them, develop them so that we are not left saying 'oh I wish we had done more for them, to encourage them and develop their skills….R9

Training… people are really the best asset recruit on attitude train on skill … develop them and treat them as proper employees… R1

Look at the EU as a whole sort out skill and qualification matching so that they can work at the level they are trained to and put more into the economy…. R3

They represent a significant opportunity to upskill the workforce train them and integrate them better… R3

Poor English was regarded by several as a problem when they first arrive and among the older people who come. Since the decision to charge for ESOL courses, numbers attending ESOL courses have dropped significantly. Given that English and general employability are prime motivators for people coming to England, making English language a more specific part of the package was an option – a language gap year, better skill development.

English can be an issue – e.g. for health and safety with machinery you have to know they know… require or provide more English opportunities… R1

English is a big bonus…. there is some English provision but there ought to be more opportunity…. From a business point of view to provide support for it… may enable them to start their own business and be more likely to stay and contribute…. R3

Do we want to use migrants as we do now or make better use of their real skills…. Language may be a barrier here… R3

More English might help, but it works well as it is now… R7

Being pro-active about any problems as they arise and addressing them quickly.

… recognise if there are problems and sort them…. Recognise and be positive about the benefits… the advantages will continue to outweigh any disadvantages… be open that we live in a different world now the global market economy is here to stay… must be open and receptive… R2

Recognise that they can't have it both ways can't say they need the migrant workers then make comments about them taking jobs… need to embrace the concept of the single market in labour market as well… R8

Make sure the local infrastructure is in place – housing enough and the right quality…. R5

Set up some kind of collaborative or local / area focused recruitment scheme to recruit people direct in their countries of origin – wherever the 'new Poland' is.

…. we would probably recruit direct – go and visit for ourselves ….. but Concordia may be gone in ten years time so we need to replace it with something…. Create a one stop shop for companies .. perhaps the local authority should create its own agency and recruit direct have a person over there somewhere… but accredited and checked….we could say to them we need 200 with such and such skills…. R6

…. Probably need to develop some kind of collaborative solution, a concerted local campaign to increase opportunities… R8

Improve how gangmasters function and are regulated, especially clarify the regulations and responsibilities for checks on legality, transport, pay etc.

Make sure that the roles and responsibilities around gangmasters are clear…. And that they are applied consistently at inspections…. that gangmasters treat *them fairly … not use lots of different deductions so they end up with £2 / hour… R6*

… make sure it is legal – get rid of exploitation….. R3

Gather better information and quotas.

… sort out the quota system… R5

… Collect better information about who is going as well as coming… R3

Sort the quotas, growers are already worried that quotas are not enough and crops are staying in the ground… R

Provide more options for local people.

…. adapt to the needs of an ageing population who might want or need to work longer but less intensively….. also make sure that young people locally actually know what jobs are available in the area – rather than commuting out often for similar jobs… R8.

Issues / Uncertainties which may be relevant in mini scenarios

Relative prosperity / exchange rates / economies etc makes 10/30/ 50% go:

Revolving door continues - Replaced by others – some / all

English continues to be a significant USP

Not replaced by others > short falls-

domino effect among local communities back home

opportunities increase elsewhere / home countries, G/F /Sp

Even more come than before

Level of economic downturn makes more come from Romania and Bulgaria as well, because benefits etc better here….

More attractive packages on offer here….

As other places 'fill up' people move on – migrants and local population movement from cities and/or very rural areas into small market towns

Level of and nature of responses locally Various options to recruit elsewhere

Gangmasters + increase of casual

Use of illegals increases

Direct recruitment in various countries – A8, Croatia, Africa as last resort

Return to South Africa/ Portugal

Outline questions for Wychavon interviews

Thank you for talking to me; We are doing some research for mini scenarios for WDC looking at impact and changes in migrant workers from EU.

Your insights and understanding of current situation and views on what and how things might change over the next 5 years…. or longer…

Can we name you as someone we spoke with?

All comments anonymous; your insights and ideas, not 'researched fact' .

1 First a little about Your organisation

2 Moving on to Your organisation's contact with / your understanding of the use of migrant workers?

3 **Looking at the wider Wychavon district:**

How would you describe current reliance on / levels of migrant workers from EU LOCAL ECONOMY?

Scale of 1- 5 where 1= NOT reliant 5 = VERY reliant

4 What do you see as the Benefits and/or risks Of this level of use of migrant workers?

A Your organisation?

B Local industry / economy / services

5 What would be the impact if lost / Likelihood of losing for LOCAL ECONOMY as a whole

6 **What change / issues / events might trigger changes in supply of migrants workers? UP or DOWN –**

How significant? / likely might such changes be?

7 **What might happen as a result? Alternative employees? Where from? Other?**

Bus in / Gang masters – consequences?

Other?

8 If you were in a position of power in 10 years from now, what would you be telling to each / any of the following to do NOW to Ensure adequate supply in future?

9 Any other comments, issues you think are important we have not touched on?

Thank you very much indeed for your time and contribution