

# Nottinghamshire area profile

## Geography

Nottinghamshire is a county covering 805 square miles (2,085 sq. km). There are three distinct areas: the relatively affluent suburbs surrounding the City of Nottingham; the towns and villages in the north-west which grew out of the textile and coal industries; and the rural areas to the east and south characterised by prosperous market towns and villages in the Trent Valley.

Towns and villages in the north and west that were the heartland of heavy industry now offer opportunities for servicing and manufacturing sector industries, with a major concentration of logistics and distribution companies on the M1 and A1 corridors.

Rural communities to the east and south, outside of the main market towns, act largely as commuter belt for conurbations including Nottingham, Lincoln, Leicester and London. These also have significant agricultural economies with market towns such as Newark and Retford offering more diverse opportunities.

## Industrial Heritage

Its recent past is dominated by traditional heavy industries which supported entire communities and multiple generations followed by their collapse during the early 1990s.

Coal, textile and clothing industries all declined with the last coalmine in the County closing in 2015. Small businesses and start-ups across a range of sectors have gradually replaced these traditional industries. These changes had a very serious impact on some communities however overall the county recovered well as new industries came to the area, existing businesses expanded, and employment grew.

## Demographic and socio-economic change

The 2017 mid-year population estimates show there are currently 817,851 people living in Nottinghamshire with the population set to increase by 62,700 over the next 15 years due to net migration and increased life expectancy. Its population is slightly older than the national average, with 20.5% aged 65+ compared with 18% in England.

The aging population trend will continue over the next 15 years with the number of 65-84 year olds increasing by almost 28% and 85+ year olds by almost 70%.

As people live longer they are more likely to experience disability and limiting long-term illnesses. The number of older people expected to live alone is predicted to increase by 48% between 2017 and 2035.

Children and young people (0-19) make up around 22% of the population and the number is expected to rise by 4.8% over the next 15 years from 182,400 to over 191,000 in 2032. The greatest increases in this age group are predicted in Gedling and Broxtowe, and the lowest in Bassetlaw and Mansfield. The largest growth is expected to take place in the 15-19 age group which is set to increase by 12% by 2032. The national forecast for the 0-19 population is a rise of 4.3%.

### **Migration**

Black and minority ethnic (BME) populations are relatively low in Nottinghamshire, making up 4% of the total compared with 15% nationally. BME populations are highest in the districts of Broxtowe, Gedling and Rushcliffe, each having 7% and mainly Asian and Mixed/Multiple ethnic groups. BME populations in Nottinghamshire have a younger age profile than the wider population.

In Nottinghamshire a relatively low proportion of residents were born outside the UK, 5% compared with 10% in the East Midlands region in 2011. Higher proportions live in Broxtowe and Rushcliffe.

The latest (Mid-2016 to Mid-2017) Long-Term International Migration figures show an inflow of 3,023 to Nottinghamshire and an outflow of 1,469 resulting in a net inflow of 1,554. All the districts have also experienced net inflows over the period, the largest being in Mansfield with 465 followed by Broxtowe with 263 and Bassetlaw with 237.

### **Skills, employment and economy**

Nottinghamshire's economic landscape has undergone significant structural change over the last 30 years. The dominance of heavy industries that supported entire communities and multiple generations has ended: the economy is now characterised by a diverse range of smaller firms and service industries.

In 2017 there were 26,800 businesses registered in the county, 89% of which employ fewer than 10 people. Only 90 firms employ more than 250 people. Growth has largely mirrored that of the national economy. Since 2006, all of the districts and boroughs have shown an increase in the number of active businesses ranging from 6.4% in Ashfield to 27.7% in Rushcliffe.

Business survival rates in Nottinghamshire are also higher than the national average at five years after start-up, 45.1% for Nottinghamshire against 44.0% for England. The county figure masks significant disparities, Broxtowe hits 49% but Ashfield only 40%.

Claimant count unemployment now stands at 1.6% (July 2018), down from 3.4% in the same month in 2012. The unemployment rate in Nottinghamshire is slightly below those of both the East Midlands (1.7%) and the UK (2.2%). Whilst there are variations within the county, overall unemployment rates are low (Bassetlaw and Ashfield have the highest at 2.1% and 2.0% respectively).

The number of residents who are economically active (79.7% of the working age population) is slightly higher than the England average (78.6%). The lowest economic activity rates are in Ashfield (72.1%) and Mansfield (76.9%).

Between 2010 and 2016 the number employed in manufacturing industries increased by 3,000 to 41,000. About 13.8% of the workforce is now employed in the manufacturing sector, second only to health and social care (14.8%).

The accommodation and food services industries have increased by 29.4% over the period and now employ 22,000 people whilst public administration and defence have reduced by 29.4% and employ 12,000 people in the county.

In terms of people qualified to degree level or above, Rushcliffe has the highest proportion in the county at 46%. This compares to a county average of 31% and a Mansfield figure of 17.5%.

Nottinghamshire (8.2%) has a higher level of people with no qualifications than England (7.6%) but Rushcliffe (2.9%), Broxtowe (5.5%), Newark & Sherwood (6.7%) and Gedling (6.8%) are all below the national average. This reflects significant strides in addressing low skills levels through improvements in both school age and adult education participation and outcomes.

### **Accessibility**

Its central location makes Nottinghamshire one of the best connected counties in England. This has been enhanced with some excellent air, road and rail links that have seen significant improvement over the last few years.

Nottinghamshire has transformed in recent years and its economy is thriving. Serviced by key road and rail infrastructure, Nottinghamshire is growing. The M1, A1 and the recently improved to dual-carriageway standard A46 offer unparalleled road connectivity, within a County served by both Midland Mainline and East Coast rail.

There is over 4,000 kilometres of road network in the county. North-south routes are particularly strong for both road and rail, with the recently upgraded M1 on the western side and the A1 to the east. The East Coast Mainline has stations at Newark and Retford, providing very good access to London and northern cities. The quality of east-west routes is more variable. Widening schemes for the A453 and A46 have resulted in improved access in the south, but significant investment is required for the A46 link with the A1 and Newark, to support growth and productivity and to relieve congestion and improve safety. This investment is being pursued in partnership with Highways England, but more is required to tackle other routes that continue to suffer from congestion, including the A614, the A38, and around the Ollerton roundabout and Kelham Bridge.

### **Housing Supply**

Over the last 4 years, there have been 8,160 houses built across the County with most houses built in Rushcliffe, Newark & Sherwood and Ashfield. According to each councils 5 year housing plan, there will be 20,604 houses built during the current 5 year planning period.

District/ borough	Ash- field	Bassetla w	Broxtowe	Gedling	Mans- field	Newark	Rush- cliffe	TOTAL
<b>5 year plan total</b>	252 5	1700	2150	2360	1834	2880	7155	<b>20604</b>

Table A: Annual housing targets by district/borough<sup>1</sup>

District and Borough Councils are responsible for delivering sufficient housing in their geographic areas to meet need and each have their own annual housing targets. These targets are set by the Government and districts focus solely on their respective areas.

Figures from the Land Registry show that the average price paid for a house in Nottinghamshire as at June 2018 was £172,684 which represented an annual growth of 4.56%. House prices in Nottinghamshire remain below the national average of £245,076 but there are significant variations between the districts in the county with average house prices ranging from £130,786 in Mansfield to £267,404 in Rushcliffe. Looking specifically at detached houses, the difference in price is even greater, the average price in Mansfield being £185,971 compared with £364,664 in Rushcliffe.

The 2016 based household projections from the Office for National Statistics show that there were 351,000 households in Nottinghamshire in 2018 and that this is expected to rise to 387,000 over the next fifteen years.

The Ministry of Housing, Communities & Local Government figures show that in 2017/18 the total reported cases of homelessness prevention and relief in Nottinghamshire was 2,417 which equates to a rate of 6.88 per 1,000 households. This is substantially lower than the rate for the East Midlands of 9.40 and England 9.16. The corresponding figure for 2012/13 was 2,075.

### **Business Profile**

Nottinghamshire has an economic activity rate of nearly 80%, higher than that for the East Midlands and the national rate. Having once been dominated by large scale traditional industries, Nottinghamshire now boasts a modern economy driven by micro and small businesses. These small companies provide 89% of all jobs in the county. This entrepreneurial spirit is manifested in its 26,800 individual businesses and being home to many well-known and respected businesses such as Boots, Rolls-Royce, Laing O'Rourke, Wilkinsons, British Sugar, Center Parcs and Benoy Architects.

High Speed Rail 2 will bring UK connectivity via the East Midlands Hub Station at Toton, offering seven services an hour in each direction to and from London and onwards across the UK. The Hub Station will see the development of a Live-Work-Play 'Innovation Campus' generating over 11,000 sector-leading jobs, coupled with a wider ambition to ensure that the associated HS2 developments and improved connectivity create a total of 74,000 jobs across the area by 2043.

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<sup>1</sup> This data is taken from publically available sources and so is subject to change as not all districts have recently published up to date plans and figures. It is correct as of publically available information as at 15.11.18.

Nottinghamshire's sector dynamics are diverse and strong. From a burgeoning and leading edge Bioscience and Healthcare sector as manifested in new developments at MediCity, a longstanding and re-invented Manufacturing presence, through to a technologically and digitally driven Logistics sector, the county's economic profile is evolving.

Nottinghamshire's Visitor Economy saw healthy growth in 2017. The number of visitors to the city and county increased by 1.3% to 35.89 million in 2017, with the value of tourism to the Nottinghamshire economy growing by 3.6% to £1.814 billion. The average spend per trip in Nottinghamshire as a whole has also risen by 2.2% to over £50. Nottinghamshire boasts an inherent advantage with the quality of its environment, manifested in Sherwood Forest, Clumber Park and the Dukeries Estates and the wider open countryside on its doorstep.

Nottinghamshire benefits from a strong cultural, literary and sporting heritage which has been boosted by recent investments at the Sherwood Forest Visitor Centre, the National Civil War Centre at Newark and Creswell Crags. Nottinghamshire has also been a stage of the Tour of Britain Cycle Race over two successive years. Its food and drink heritage is notable, famous for Stilton Cheese and the Bramley Apple, as well as the Welbeck Estate (itself home to the School of Artisan Food) and the Welbeck Abbey Brewery.

Business challenges remain. The East Midlands Chamber's Quarterly Survey for Q2 2018 reports many of these challenges have a national context – uncertain conditions for investment and expansion; a slight dip in business confidence given profitability and turnover concerns but remaining strong overall alongside some concerns as to future trading conditions, sterling exchange rates and inflationary pressures. Access to skilled labour remains a specific and heightened concern and the D2N2 LEP is focusing heavily on the productivity challenge in the drafting of its latest version of the Strategic Economic Plan.

However, the Chamber notes that the East Midlands area overall continues to outperform other parts of the country, demonstrating good levels of resilience despite on-going uncertainties.

## **Environment**

Nottinghamshire enjoys a rich historic environment and a diverse landscape.

There are 2,538 hectares of ancient woodland that dates back to at least 1600AD, 67 Sites of Special Scientific Interest covering nearly 3,400 hectares, 64 nature reserves and over 1,400 local wildlife sites. A Special Area of Conservation covering 270 hectares of Sherwood Forest forms part of the 424-hectare National Nature Reserve.

Nationally and internationally important sites cover only 1.6% of Nottinghamshire, however, compared to the average of 8.4% for England and only 16.14% of Sites of Special Scientific Interest (SSSI) in the county are currently in favourable condition compared to 38.62% in England as a whole. Since the 1920s Nottinghamshire has lost 90% of its lowland heathland and 97% of its flower-rich meadows. Opportunities

to restore sites for biodiversity are currently being considered at former colliery and quarry sites such as Thoresby, Rufford and Langford Lowfields.

The County has 3,805 Listed Buildings, 158 Scheduled Ancient Monuments, 19 Registered Historic Parks and Gardens, 146 Conservation Areas and one Registered Historic Battlefield from the Battle of Stoke, the last pitched battle in the War of the Roses (1487). The site is in between the modern-day communities of East Stoke, Elston and Flintham. Creswell Crags, which sits across the border between Nottinghamshire and Derbyshire, is currently on the tentative list for World Heritage Site status.

The Nottinghamshire Historic Environment Record (held and maintained by the County Council) also has records for 4,700 non-designated heritage assets (buildings) and over 8,900 known archaeological sites/finds. At the latest full survey of heritage at risk buildings, 6.4% of the County total was considered to be at risk. Historic England's Heritage at Risk Register for Nottinghamshire also records 18 places of worship, 12 Scheduled Ancient Monuments, 2 Registered Parks and gardens and 10 Conservation Areas as being At Risk

The County's natural and historic environment provides a sense of place for local communities, helps to make Nottinghamshire an attractive place to live and do business and supports the growth of the visitor economy. Key visitor hubs include Sherwood Forest Visitor Centre/ Rufford Abbey and a string of sites along the Trent, including the National Watersports Centre at Holme Pierrepont.

Access to and engagement with the natural environment is a cost-effective way of improving health and well-being and is associated with a reduction in the risk of developing long-term conditions such as diabetes; lower rates of anxiety and depression; improved wellbeing; and, improved levels of social interaction and community cohesion. Income related health inequalities are reduced in areas where people have close access to open green spaces.

Much of what is important about Nottinghamshire's natural and historic environment is irreplaceable. Reversing the trends of habitat loss, tackling invasive non-native species and finding solutions for heritage at risk requires a strategic approach, often at a landscape scale. One example of a strategic, co-ordinated approach to addressing the need for housing, business, minerals, agriculture, recreation and conservation that works within the landscape but across boundaries, is that currently being considered for the Trent Valley (Trent Valley Vision). Initial economic studies indicate that such an approach could provide significantly greater benefits than would be gained by addressing each need in isolation.

### **Health and Wellbeing**

The population of Nottinghamshire has a similar life-expectancy for males compared to England; the measure for females has fallen to below England in the latest data. Conversely, healthy life-expectancy for males is lower than England, but similar for females in the latest available data.

Compared to the national average, a higher proportion of residents report long-term illness that limits their day-to-day activities and a higher proportion report their health as being 'poor' or 'very poor'.

Parts of the County are very affluent, with other areas being amongst the most deprived in England. These differences are reflected in health disparities across Nottinghamshire. These differences tend to even out across the County, with many health outcomes for Nottinghamshire being close to the England average. This is reflected in the gap in life expectancy; males in the most affluent parts of the County can expect to live over 9 years longer than citizens in the most deprived areas. The difference for females is 8 years.

Unhealthy lifestyles continue to drive an increase in long-term health problems, including:

- 1 in 6 adults smoke
- 2 in 3 adults are obese or overweight
- 1 in 3 adults are physically inactive
- 1 in 5 adults consume alcohol at harmful levels
- Over 1 in 7 pregnant women smoke

Many long-term conditions are preventable, but the prevalence is expected to increase over the next few years. For instance the prevalence of diabetes is expected to increase by 6% by 2025. The percentage of people with several long-term conditions is expected to rise over the same timescale; this is an important driver of demand for healthcare.

The rate of early deaths (aged under 75) in Nottinghamshire are similar to England when all causes are considered or cancer deaths only. The rate of early cardiovascular deaths is better than England.