

# Location Review – St.Helens, Merseyside

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2005



east west locations ltd

# Introduction

The following report provides a thorough assessment of the demographic profile, local labour market and extent of recruitment potential applicable to the St.Helens journey to work catchment in Merseyside. All data relate to this catchment rather than to St.Helens itself or other administrative areas unless otherwise stated.

The report is further supported by ...

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

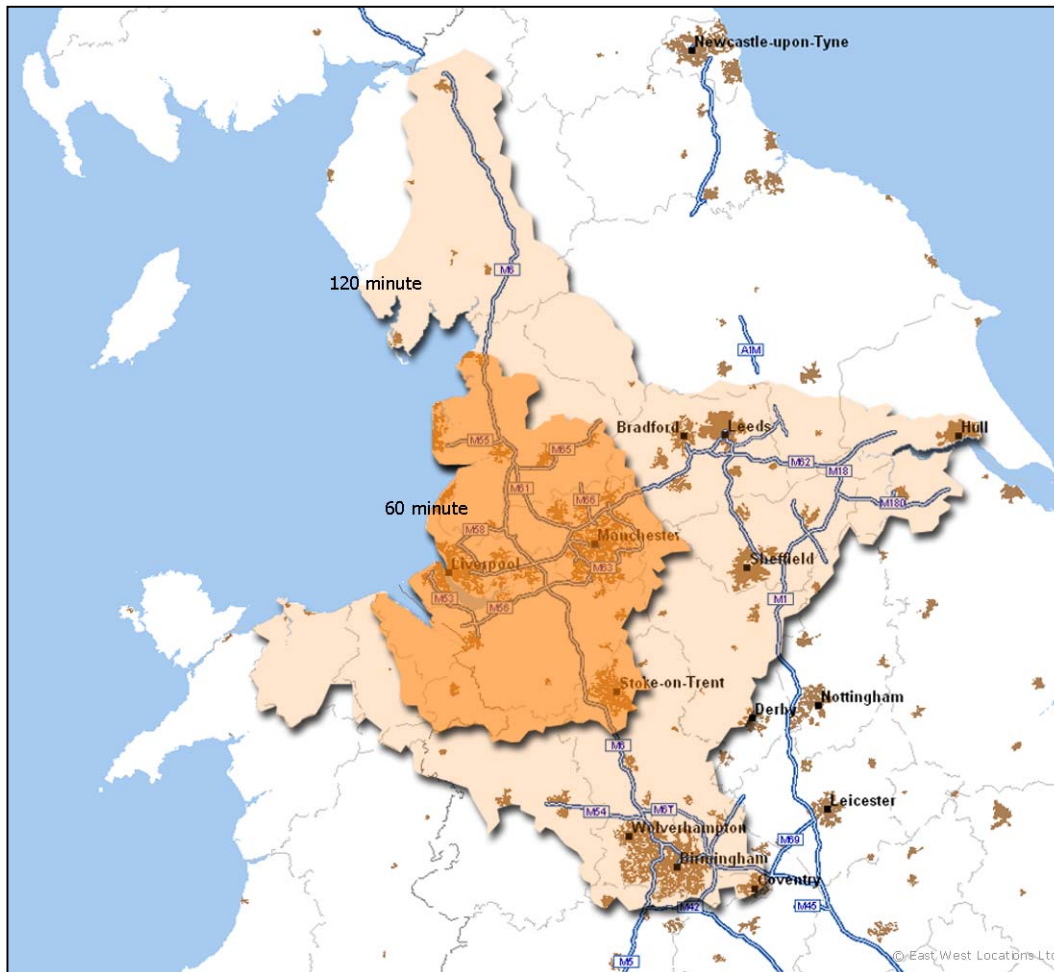
# The Journey To Work Catchment

The 30 minute Journey To Work Area (JTWA) during peak hours



# Regional Connectivity

One of the most densely populated regions in the UK



## ■ 60 Minute Catchment

6.8m Residents

4.3m Working Age Population

2.6m (38.1%) Under 30

Preston, Manchester, Stoke, Chester

## ■ 120 Minute Catchment

14.8m Residents

9m Working Age Population

5.7m (38.2%) Under 30

Birmingham, Carlisle, Leeds, Hull

# Demographic Profile

## Key Data

### Overall Demographics

Catchment Population (2003)	318,360
male	153,360
female	165,000
Working Age Population, 16 to 64	199,950
male	97,440
female	102,510
Population Change, 2001 - 2003 (City region -4.8%, England 5.2%)	-0.8%
Working Age Change, 2001 - 2003 (City region -4.6%, England 0.7%)	-0.3%

### Future Working Age Population

Net change (to 2013)	7,290
Growth, % of current group	+3.6%
male	+4.5%
female	+2.8%

## Summary

- Close to a third of a million people reside within the journey to work catchment of St.Helens. 200,000 people within the catchment are of working age.
- Similar scale 30 minute catchment areas include Newcastle North (317,200), Coventry (304,200) and Milton Keynes (344,900).
- Women account for 51.8% of the population in the catchment and 51.3% among those of working age.
- In contrast to other parts of Merseyside the overall and working age groups have remained broadly similar in scale over recent years.
- Looking forward, a net change in the working age population of some 7,300 people by 2013 will result from those approaching retirement and 5 to 14 year olds maturing into working age.
- Net of migration effects this would represent an increase equivalent to 3.6% of the current group, producing a working age population that is both younger and larger. A stronger growth in young males is also predicted over this period.

# Demographic Profile (2)

## Key Data

### ■ 16 to 19 Year Olds

Total Residents, 16 to 19	12,660
females	6,240

### ■ 20 to 29 Year Olds

Total Residents, 20 to 29	36,420
females	18,660

### ■ 30 to 39 Year Olds

Total Residents, 30 to 39	47,770
females	24,860

20 to 39 yrs, % of working age	42.1%
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### ■ Those Approaching Retirement

55 to 64 Year Olds	37,910
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## Summary

- The catchment's profile is relatively young. Those aged under 30 years make up close to a quarter of the working age population..
- ..with a further 23.9% of the working age group between 30 and 39 years old.
- In all, over two fifths of the working age group are aged between 20 and 39 years old, matching the profile in the city region (42.1%).
- As in the overall population, the working age group is dominated by females in each age range from 20 years old upwards.
- The largest difference occurs among those aged between 35 and 39. In this group women account for 52.3% of total.
- Those in their final ten years of working age account for close to one fifth of the working age group (19%). This is a slightly larger group in St.Helens than across Merseyside as a whole (17.9% of total).

# Workforce Profile

## Key Data

### ■ Employment Data (2004)

Overall employees	141,000
males	76,800
females	64,200
Employees of working age	136,330
females as %	45.0%
Young Employed, 16 - 24 yr olds	24,730
females as %	47.6%
Employed aged 25 - 34 years old	39,470
females as %	43.8%
'New Grey' Employees	4,670
% of Employees	3.3%
(City region 2.7%, England 3.2%)	

## Summary

- 141,000 residents are currently in work.
- Similar scale catchment workforces include Bedford (145,500), Doncaster (139,700) and Peterborough (138,000).
- Over 136,000 employees are of working age, with 45% of these being women.
- The catchment has a generally young workforce profile.
- The young employed, those aged between 16 and 24 years, make up 18.1% of employees of working age, above the 16.3% city region and 14.8% English average.
- This pattern is more pronounced again among those aged 25 to 34. This group accounts for 29% of the workforce, significantly above 22.5% in the city region and 23% nationally.
- 3.3% of the workforce currently work beyond the official retirement age. This rate stands above the average for 'new grey' employment within the city region and in line with current national experience.

# Profile of Occupations

## Key Data

### ■ Occupational Profile

Professional Staff	12,050
Part Qualified Professionals	13,240
Sales & Customer Service jobs	14,800
Admin / Secretarial jobs	16,650
Public / Emergency Services	12,470
Skilled Trades	17,600
Process & Machine Operators	17,960

### ■ Part time employees

Total employed part time	17.7%
(City region 24.9%, England 25.4%)	

## Summary

- Professional staff account for 8.5% of all employees, with..
- ..a further 9.4% in part qualified professional occupations.
- Administrative, clerical and secretarial occupations account for 11.8% of the workforce in the catchment.
- Many of these staff currently travel outside of the immediate St.Helens area for their work.
- There is a particularly high incidence of employees with skilled trades in the catchment area, accounting for 12.5% of the workforce against 11.3% in Merseyside and nationally.
- Making up 10.5% of all employees, those working in sales and customer service positions also exceed city region (10.3%) and national (7.9%) averages.
- 25,000 people are employed on a part time basis in the area. At 17.7% this falls significantly below the part time rate in Merseyside or England and offers an opportunity to unlock a larger, as yet latent, labour pool for recruitment purposes.

# Workforce Training & Skills

## Key Data

### ■ Workforce and Training Activity

% of population in training	12.0%
males	12,490
females	11,590
Employees in training	14.0%
Service Sector emp's in training	14.1%
Population with NVQ Level 3+	64,810
Employees with NVQ Level 3+	53,900
Population with NVQ Level 4+	30,120
Employees with NVQ Level 4+	26,170

### ■ Training Excellence

Nationally recognised Centre's of Vocational Excellence in training exist in the catchment in the following areas:

- Building Services Engineering
- Logistics
- Business and Information Technology

## Summary

- Over 24,000 people are currently undertaking job related training within the catchment, slightly higher than the 11.5% for the city region.
- The training rate among those in work is currently 14%, similar for the whole workforce or those in service sector jobs. In contrast, 13.4% of service sector employees in Merseyside participate in similar activity.
- In absolute terms, this translates into a total of 19,750 employees currently in receipt of work related training activity.
- As a result of training activity, the local workforce is well qualified.
- Close to one third of the working age population hold an NVQ at level 3 or higher, with 46.5% of these holding the higher NVQ level 4, broadly equivalent to a degree.
- Almost 11,000 people holding level 3 NVQs (16.8%) do not currently work, with 13% holding the level 4 qualification not working.
- These residents signal an important, well qualified target group for recruitment purposes.

# Jobseekers and Other Labour Pools

## Key Data

### ■ Unemployment Data (2004)

Unemployed (monthly average)	5,785
males	4,330
females	1,455

Unemployment Rate (City region 3.6%, England 2.2%)	2.9%
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Unemployed 20 to 29	1,875
females	445

Unemployed 30 to 39	1,325
females	230

### ■ The Hidden Labour Market

Working Age Off Labour Market	53,570
females	30,000
16 to 24 year olds	11,460
25 to 34 year olds	8,940
Extent of 'hidden labour market'	10,710

## Summary

- An average of 5,785 people per month were registered as actively seeking work during 2004 in the catchment area.
- Jobseekers are heavily weighted towards men, accounting for 74.8% of total, and the young.
- One in three jobseekers were aged between 20 and 29 years old (32.4%). Of these, over three quarters were young men (76.3%).
- A further 23% of jobseekers were aged between 30 and 39 years. Males made up a larger part of this group still (82.6%).
- At 2.9% the unemployment rate in the St.Helens journey to work catchment is however, relatively low compared to Merseyside as a whole (3.6%).
- Over a quarter of the working age group are classed as economically inactive (26.8%), not working or actively seeking work. 56% of this group are female, and 23% are aged between 16 and 24 years old.
- Data on inactivity suggests that 20% of this group may consider work given the right opportunities. Time and childcare are the largest limiting factors cited.

# Education Factors

## Key Data

### ■ Education Performance

*Proportion of pupils gaining..*

5 or more GCSEs (A\* - C grades) 50.1%

(City region 48.3%, England 53.7%)

5 or more GCSEs (A\* - G grades) 89.8%

(City region 86.3%, England 88.8%)

Average GCSE points score 321.6

(City region 319.0, England 340.4)

A Level point score (per student) 230.6

(City region 238.3, England 269.2)

### ■ University Labour Pools

University Undergraduates 42,300

overseas, % of total 8.5%

University Postgraduates 10,100

overseas, % of total 26.8%

Language Graduates per year, %\* 8%

IT related Graduates per year, %\* 7.2%

(England, languages 6.7% IT/comp science 7.1%)

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

## Summary

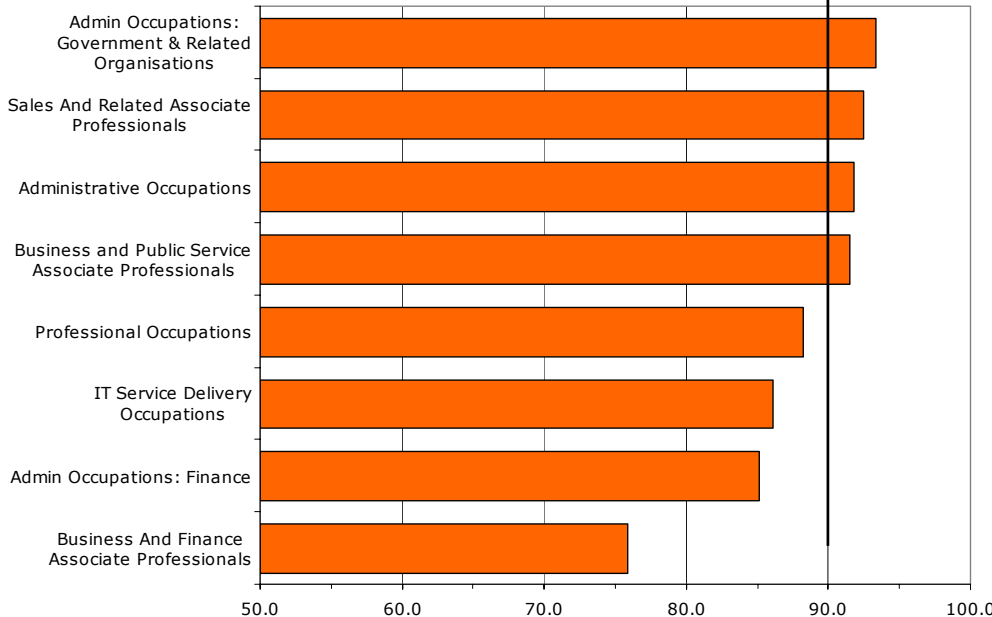
- School examination results in the St.Helens catchment perform very well against the Merseyside average and stand close to national average for overall GCSE passes and pupil scores.
- Good quality GCSE level results provide an average points score of 321.6 against 319 in the city region.
- At A level stage, institutions are producing high quality individuals, in some cases with points scores 40% above national average.
- A number of high quality schools are found in the catchment whose results significantly exceed both local and national averages.
- At over 52,000 strong, Liverpool offers one of the largest student populations in the north of England.
- The three University institutions produce 8,100 first degree graduates per year. Around one third of these stay in the city following graduation.
- The city's strong cultural mix is further boosted by a wide range and high proportion of overseas students at all levels.

# Labour Market Costs

## Key Data

### ■ Location Costs (England = 100)

All Sectors Professionals	88.2
All Semi-Qualified Professionals	91.5
Business/Finance Semi-Qualified Professionals	75.9
Government Sector Administration	93.3
General Clerical Administration	91.8
Financial Sector Administration	85.1
IT Support Staff	86.1
Customer Service Agents	95.1



## Summary

- Data to left highlight the occupations in which the St.Helens catchment offers a competitive location for employers (with a national average pay index set at 100).
- Service sector costs are generally lower in the area than elsewhere in the region, and fall below many other parts of Merseyside.
- A specific competitive position appears to exist in terms of financial services and related back office employment.
  - Salaries for IT and related support staff, usually exhibiting only a small degree of fluctuation across the country, are 10% to 15% below national average in the catchment.
  - Many of these staff currently travel elsewhere in the region for work.
  - Qualified sales related occupations also offer close to a 10% reduction on national average salary levels.
  - A more focused consideration of costs by specific job types is provided later in this report.

# Sites and Premises

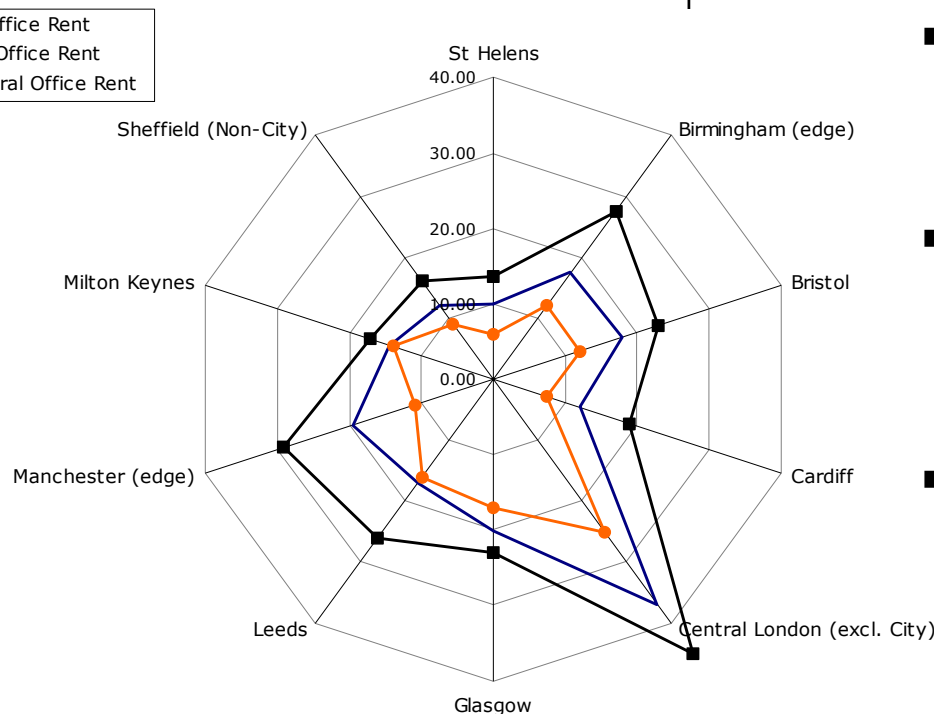
## Property Costs

- Maximum office rents no more than £14.50/sq ft and, in some cases, below £10/sq ft illustrate the area's competitive advantage in property terms well.
- Away from the main employment sites in the area, rents fall further to an average of around £6.00/sq ft. The potential for cost savings is significant when compared to many competing edge of city centre markets in the UK.

## Example Sites and Premises

- **Alexandra Park** Good quality serviced office space set within 22 acres of well kept grounds with mature trees and an ornamental lake offering a quality working environment with excellent security on site services including cafeteria and gymnasium
- **Woodlands** High specification prestigious office development in a rural setting close to Junction 23 on the M6 motorway

- **The Parks.** High quality, ground floor office accommodation and high quality, two storey office building available in its entirety. Situated in a high profile business location.
- **Waterside Court.** An attractive office park close to St.Helens Town Centre yet within easy reach of the motorway network. High specification building situated within the Technology Campus.
- **Century House.** Prominent office building situated in the Town Centre, comprising of ground floor and 8 upper floors of 4,188 sq m.



# Business Support and Experience

## Business Support

### ■ Agencies

A host of agencies offering a broad range of support can be co-ordinated by The Mersey Partnership including NWDA, Business Link and Greater Merseyside Learning and Skills Council.

### ■ Financial Assistance

#### **The Highest Level of Financial Assistance Available in the UK**

The Wirral & Merseyside have a raft of funding mechanisms and expertise available, including start up business funding, to improve competitiveness. It is one of only four areas in the UK with European Objective I Status and classified as a Tier One Assisted Area, the highest status available in the UK.

#### **Merseyside Special Investment Fund**

#### **Selective Finance for Investment (SFI)**

#### **Seedcorn Fund**

#### **Grants for Research & Development**

#### **Gap Funding**

#### **Local Authorities Support**

#### **Learning & Skills Council Training Support**

#### **St.Helens Chamber**

## Recent Employer Experiences

■ **MoneyExpert Limited.** Moved into the area in October 2004 with assistance from St.Helens Council, MSIF and TMP. The company operates a web based financial information advice service and brokerage and now has a growing customer contact centre.

■ **Knauf.** Founded in 1932 and still owned by the same German family, the company has expanded worldwide delivering products and services in building materials, thermal insulation, limestone, chalk and plant engineering. Knauf Insulation has over 100 production plants in over 30 countries, with a turnover exceeding 3 billion Euros. In the UK there are plants at St.Helens, Queensferry, Cwmbran and Hartlepool.

Prior to becoming part of Knauf, the St.Helens site was founded in 1948 as Fibreglass Insulation (part of Pilkington) and then became part of Owens Corning and Alcopor before being bought by Knauf in 2002. The site goes back almost 300 years and was one of the first glass making sites in St.Helens. It is a large site with 320 people currently employed there.

# St.Helens is Tops for Business



East West Locations, one of the UK's leading independent economic development and corporate location consultancies, has found using comparator research that St.Helens is one of the most attractive potential locations in the country for the office market.

For further information, including labour market costs, for key business clusters please click on the following links:

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