

State of Dorset

September 2015

Economy

Deprivation

Older People

Children

Health and Care

Natural and Historic Environment

Leisure and Culture

September
2015

State of Dorset Economy



Dorset County Council

The UK has a productivity gap, but for every hour worked in Dorset our economy produces ten per cent less than the national average.

Big Numbers Box

20,800 businesses

150,800 employees

36% of workforce aged 50+

12,000 Expected employment growth by 2024

£498

weekly pay for full-time employees in Dorset

18% self-employed

30% workers in high productivity employment

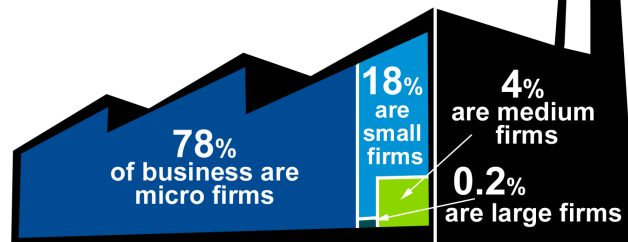
16-18 year olds working in jobs without training

1,037

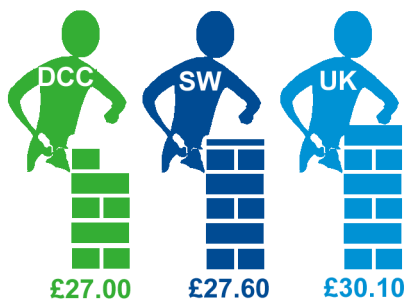
Box 1: Businesses

- Although business survival is good, we have fewer than average business births: 46.0 to every 10,000 residents compared with 57.3 in England¹.
- And we have smaller business units: just 7.5 employees per business unit compared with 10.6 in England².
- We have an above average percentage of enterprises that are more than ten years old³ and competitiveness is below the national average, particularly in Weymouth & Portland (despite a four percentage point improvement on 2010)⁴.

Businesses by size



GVA per hour worked



- Whilst we have above national average representation of advanced engineering and manufacturing as a whole, we have low representation of both businesses and employees in high productivity sectors² and also below average representation in high R&D spending sectors⁵.
- Self-employment in Dorset is high in Dorset: about 18% of economically active residents compared with 14% in England⁶.

- Government spending cuts affect the wider economy through supply chains and reduced funding grants for the voluntary and community sector. Procurement from local firms keeps more money in our economy: on average, every £1 of local authority procurement spending with local firms generates an additional 51p in the local economy - even more if spend is with small and medium sized firms⁷.

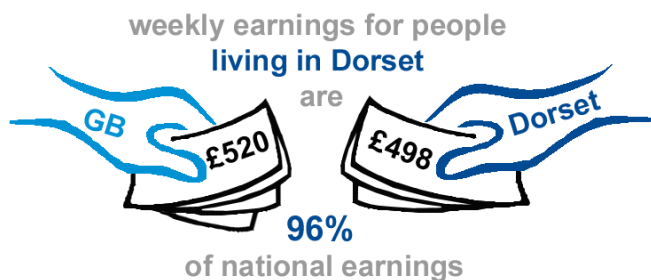
Sources

- 1 Business Demography 2013, ONS
- 2 UK Businesses 2014 and BRES 2013, ONS
- 3 UK Business 2014, ONS
- 4 UK Competitiveness Index 2013, Centre for International Competitiveness

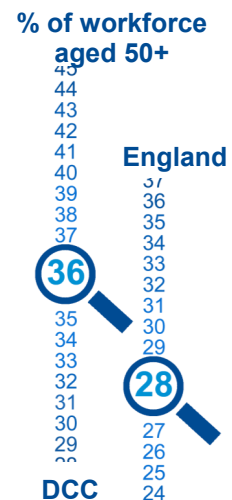
- 5 Research and Development in the UK, February 2015 SN04423, House of Commons Library (Sourced from ONS Business Enterprise R&D data)
- 6 Census of Population 2011, ONS
- 7 Local Procurement: Making the most of small business, one year on, Federation of Small Businesses

Box 2: People

- Employment is expected to grow by more than 12,000 in Dorset over 2014-2 - but about a quarter of this new employment will be part time.
- Manufacturing, health, retail, education and hospitality are all big employers in Dorset
- 13 neighbourhoods in Dorset are in the most employment deprived 20% nationally⁸ - 12 of these are in Weymouth & Portland.



- Earnings are below average. Median gross weekly pay for full time employees was £498 for Dorset residents compared with £520 in Great Britain⁹.



- 36% of the Dorset workforce is aged over 50 compared with 28% in England¹⁰. Older workers have the benefit of experience and skills, but they will need replacements as they retire. Over the next decade, the population in Dorset aged 16-64 will shrink by 0.4% per annum. That's a net loss of 6,065 people in this age group.
- Too many young people are in jobs without training (1,037)¹¹, or are unemployed (605)¹²: more businesses need to work with schools to offer work experience opportunities and quality apprenticeships.
 - Only 103 local apprenticeships are currently advertised in Dorset¹³. The National Audit Office estimates that the economic benefit of every £1 of government funding for Apprenticeships is £18¹⁴.

Why does it matter:

Innovative, dynamic economies offer better quality jobs making an area attractive to investing businesses and offering good opportunities to young people - as long as they have the right skills and work experience employers are looking for and the right support and infrastructure are in place to allow businesses to grow.

High productivity means employers can offer higher wages helping them to attract and retain staff – and making it easier for workers to afford housing.

Better pay and rewarding jobs improve quality of life, wellbeing and health - and higher wellbeing among workers leads to higher productivity, improved employee engagement and greater customer satisfaction.

By means of local procurement, the council can add to social and environmental wellbeing in the county as well as economic value, for example through contracts with firms that ensure sustainable working practices and those offering quality Apprenticeships.

Sources

8 English Indices of Deprivation (2010), DCLG
 9 Annual Survey of Hours and Earnings (2014), ONS
 10 Census of Population (2011), workplace statistics
 11 Dorset Quarterly Report 16-18 year olds (Academic Age), January 2015 (quarter one), Ansbury

12 Claimant Count (percentage aged 16-24 in quarter one 2015), ONS
 13 National Apprenticeship Service 09/07/2015, excluding nationwide vacancies
 14 Estimating economic benefits from apprenticeships, February 2012, National Audit Office

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Deprivation



Dorset County Council

Deprivation has a significant impact on health and wellbeing. Dorset's areas of deprivation are largely located in the most urban areas - in particular Weymouth & Portland - but many of Dorset's rural communities could also be considered deprived in terms of barriers to housing and essential services.

As the number of older people living in rural areas grows, the challenge of access to facilities and pressure on health and care services will accelerate.

Big Numbers Box

13 areas of Dorset in most deprived nationally

Dorset population living in rural areas **41%**

Lower end house prices

9 times higher than lower end earnings

65

areas in most deprived nationally for **access to housing and services**

13

areas in most deprived nationally for **crime**

5

areas in most deprived nationally for **income**

13,300
workless households

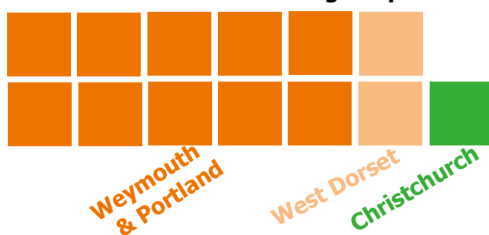
1,300

Children live in workless households

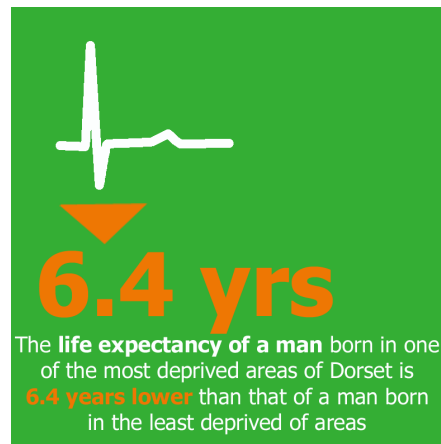
Box 1: Social deprivation

- There are thirteen areas (out of a total of 247) in Dorset within the top 20% most deprived nationally for multiple deprivation, up from ten in 2007¹.
- Ten of these are within the urban borough of Weymouth and Portland, two are in West Dorset and one is in Christchurch.

13 areas in Dorset suffer high deprivation



- 13 of Dorset's neighbourhoods are in the 20% most deprived nationally in relation to crime. Ten of these are in Weymouth and Portland¹.
- 41% of Dorset's population live in rural areas³. Barriers to housing and essential services are significant in Dorset reflecting rurality and distance from services. 65 Dorset neighbourhoods fall in the 20% most deprived nationally for this measure: 23 are in West Dorset and 15 in North Dorset¹.



- The gap in life expectancy between the most deprived and least deprived areas of Dorset is 6.4 years for men and 5.5 years for women².

Sources

1 English Indices of Deprivation (2010), DCLG

2 Life Expectancy, 2009-11, ONS

3 Census of Population, 2011

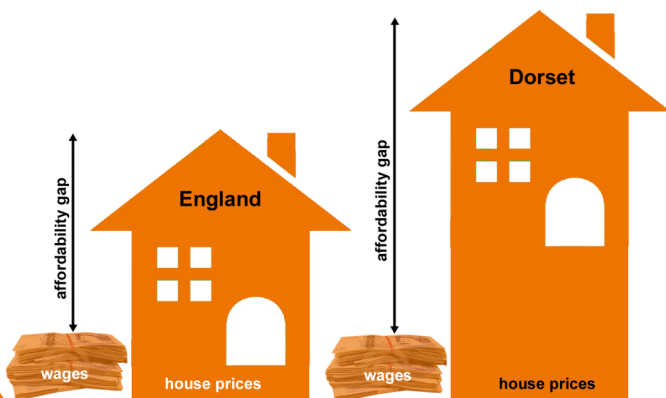
Box 2: Economic deprivation

- Five neighbourhoods in Dorset fall into the top 20% nationally for income deprivation - four of these are in Weymouth and Portland¹.
- Weymouth and Portland residence based weekly earnings are £469 per week compared with £520 in Great Britain⁴.



Weekly earnings are lower for people living in Weymouth and Portland

- In Dorset, about 16,000 people and 1,300 children live in 13,300 workless households: 11% of Dorset households were workless compared to 17% nationally⁵.
- In 2013, lower end house prices were nine times higher than lower end earnings in Dorset - and even higher in East Dorset, Christchurch, Purbeck and West Dorset⁶.



Why does it matter:

Deprivation impacts heavily on both individuals and families and consequently on council services, as those likely to suffer deprivation rely more heavily on intervention and support from the public sector. Low income households will qualify for additional assistance for a range of council services such as Adult and Community Services and Children's Services.

Areas of high deprivation also correlate strongly with higher levels of certain types of crime such as anti-social behaviour, domestic violence and burglary.

Deprivation is also a key challenge to health and well-being with levels of obesity and other lifestyle related conditions higher amongst those living in deprivation.

For those suffering deprivation in rural areas, poor access to services can exacerbate problems that they already face. Social isolation provides a challenge for the provision of council services.

Sources

- 4 Annual Survey of Hours and Earnings (2014), ONS (full time gross weekly earnings)
- 5 Annual Population Survey (2013), ONS
- 6 Ratio of lower quartile house prices to lower quartile earnings (2013), DCLG

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Older People



Dorset County Council

The number of older people living in Dorset will continue to grow adding to increased demand for health and care services.

Over the next decade, the number of those aged 85+ is expected to increase by more than a third¹.

Big Numbers Box

418,300 people

Aged 65+
in Dorset **28%**

In England
& Wales **18%**

1.7 % pa

Growth in those
aged 65+ over
next decade

81 years

Life expectancy males

85 years

Life expectancy females

Box 1: Population Change

- Overall the population of Dorset has increased by 0.4% (1,500) in the last year¹.
- Deaths outnumber births by about 1,300 so Dorset's net natural population declined¹.
- Migration gives a net gain of around 3,600. Around 21,100 people moved into Dorset from other parts of the UK and around 18,000 moved out. International migration gave a net gain of around 500¹.
- The greatest net migration gain is of children and those aged 45-64 whereas there is a net loss of 16-24 year olds¹.

Age profile 2014

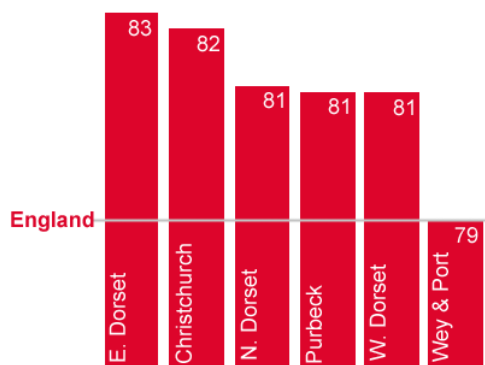


- Over the next ten years, the percentage of Dorset residents aged 65+ is expected to grow by 1.7% per annum. That's an increase of 22,100 people - and more than a quarter of these (6,200) will be aged 85+².
- This isn't happening in Dorset alone but in Dorset we have a higher starting point. 28% of our population is aged 65+ (115,100) compared with 18% in England & Wales¹.

Box 2: Life Expectancy

- Increased life expectancy and continuing migration - largely from other parts of the UK - account for the growing population of older people.
- Life expectancy at birth for both males (81.3 years) and females (85.0) is above the national average (England and Wales males 79.4 years and females 83.1)³.
- Life expectancy varies throughout the county with Weymouth and Portland about in line with England and Wales.
- The life expectancy gap between Dorset's most and least deprived areas is 6.4 years for males and 5.5 years for females.

Male life expectancy by district



Life expectancy in Dorset



Why does it matter:

Over the next decade, many more of us will move into the 65+ group and will probably move out of work too.

Demand for care workers will grow - and it's already a problem - but it's not a job that many young people want to do.

Services for older people and people with physical disabilities currently command almost 55% of the adult social care budget. Data modelling can help identify and target services to areas of most need.

More family members will need to act as carers. In 2011 there were 49,300 unpaid carers in Dorset, an increase of 17% over 2001.

More houses are likely to be under-occupied as older people are encouraged to stay in their own homes - this will put further pressure on house prices. And older people living on their own can be isolated and lonely.

Sources

- 1 Mid-year population estimates (2014), ONS
- 2 Subnational population projections (2012), ONS
- 3 Life expectancy at birth (2011-13), ONS

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Children



Dorset County Council

Experiences in a child's early years lay a foundation for health and wellbeing and our services for children and families have an important role in building future resilience.

By identifying those most at risk of poorer outcomes later on, our resources can be targeted where they are needed most so that we can respond to risk and vulnerability.

The number of 0-4 year olds is expected to fall by a small amount over the next decade: down from 19,700 in 2015 to about 18,900 in 2025 (-0.4%pa). At the same time, the number of 5-15 year olds will increase from about 47,800 to 51,800 (0.8% pa).

Big Numbers Box

67,460 total children

primary school children with Special Educational Needs **1.2%**

344 children and young people in care in Dorset

64%

Children leaving care go into suitable accommodation

88 child protection enquiries per 10,000 children

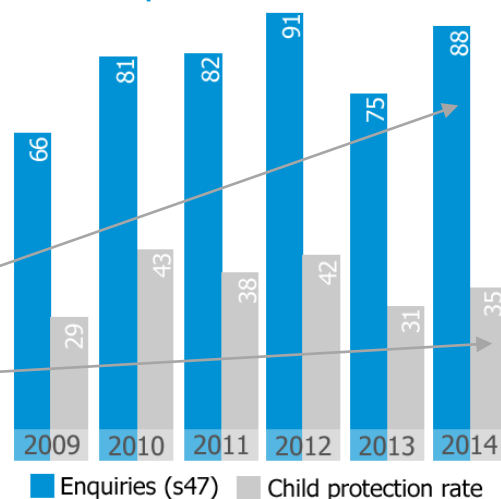
44 looked after children in every 10,000 in Dorset

35 child protection rate per 10,000 children

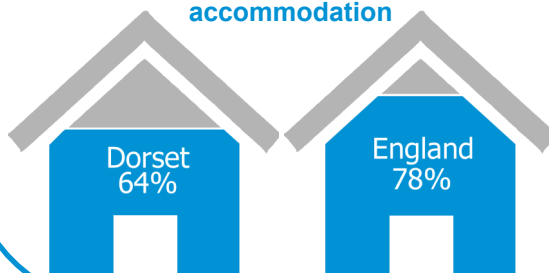
Box 1: Vulnerable children

- Vulnerable groups include:
 - those from deprived socio-economic backgrounds;
 - those with special educational needs;
 - children from particular ethnic groups.
- In March 2014, there were 344 children and young people in care in Dorset¹.
- There were 88 child protection enquiries (s47) per 10,000 children in 2014 compared with 124 in England.²
- The child protection rate in March 2014 was 35 per 10,000 children compared with 42 in England.²

Child protection: Dorset



% of children leaving care going into suitable accommodation



- The rate of looked after children rose from 39 per 10,000 children in 2012 to 44 in 2014².
- Suitable accommodation is not always available for children leaving care. In 2014, 64% of Dorset children leaving care went into suitable accommodation - below the national average of 78%.²

Sources

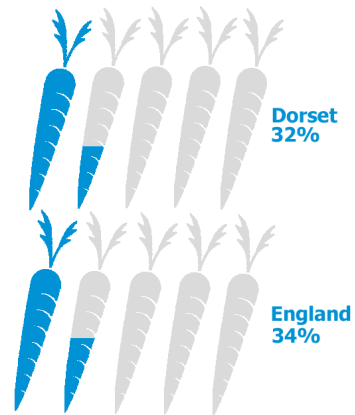
1 Local electronic case recording system

2 Local Area Interactive Tool (LAIT): Available at: <https://www.gov.uk/government/publications/local-authority-interactive-tool-lait> [accessed 17th March 2015]

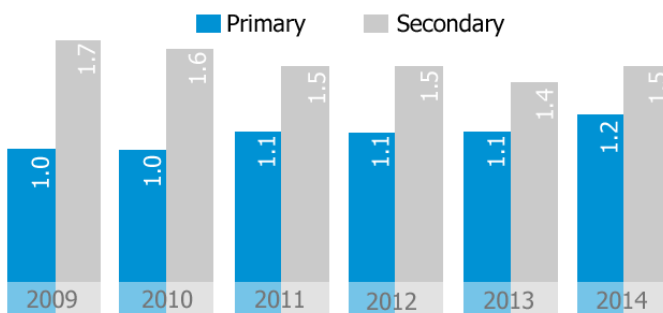
Box 2: Schools

- In 2014, 68% of children achieved a good level of development in the Early Years Foundation Profile (introduced in 2012) compared to 60% in England, with Dorset's performance tenth highest in the country².
- 32% of pupils eligible for Free School Meals (FSM) in Dorset achieved five or more GCSEs at grades A*-C including English and Maths compared with 34% nationally².
- 12% of primary pupils eligible for Free School Meals actually take them up - compared to 17% nationally².

Pupils eligible for FSM achieving 5+ A*-C GCSEs



SEN statements



- In 2014, 1.2% of primary school pupils had a statement of Special Educational Needs (SEN) as did 1.6% of secondary school pupils².

Why does it matter:

There is evidence to show that what a child experiences in early years, starting in the womb, affects health and wellbeing in later life. Early intervention is therefore key and cutbacks in spending on this for short term financial gain can lead to greater long term costs, both financial and social³.

Research suggests that a range of interventions to provide support at different levels of need is most effective, with spending prioritised on:

- Children's centres and early years (particularly breastfeeding initiatives and the Nurse Family Partnership);
- Speech, language and communication needs;
- Parenting programmes; targeted family support; and
- Young people on the edge of care

These types of early intervention, underpinned and targeted through the use of sound evidence, can help identify those at risk in later life.

Evidence suggests that smarter working with the whole family leads to improved outcomes and better value for money and, as some will need ongoing support, there needs to be a continuum of services to support vulnerable people over time.

Sources

3 C4E0 Grasping the Nettle: early intervention for children, families and communities

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Health and Care



Dorset County Council

Dorset residents are generally healthy, but the growing number of older people will increase demand for health and social care services.

Health behaviours impact on both physical and mental health - and many people may be affected by more than one health behaviour.

Big Numbers Box

11,000 people aged 65+ living with dementia by 2025

29% Dorset Y6 Children overweight

10,000 people affected by domestic violence every year

1 in 5 Dorset adults obese

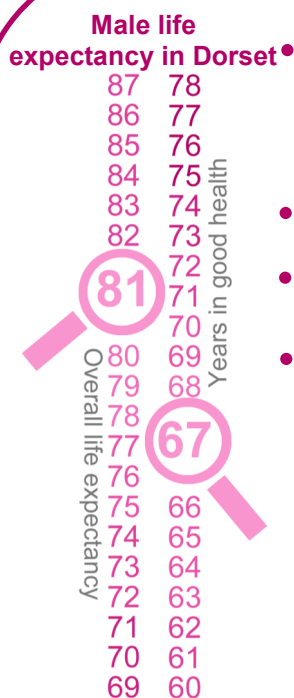
Every **£1** invested in drug treatment returns **£5.42** in health & crime savings

14-20 years

difference between healthy life expectancy and overall

smoking related deaths in Dorset every year **730**

Box 1: Physical health



Healthy life expectancy is the number of years a person would be expected to live in good health. In Dorset, there is a difference of 14-20 years between healthy life expectancy and overall life expectancy.¹

- One in five Dorset adults is obese; better than the national average³.
- 29% of year six children are overweight, but this is better than the national average².
- Almost a quarter of children in reception are obese - marginally above the national average².

% year six children who are overweight



- Incidence of malignant melanoma in those under 75 is above the average in Dorset at 29.5 incidences per 100,000 people compared with 18.4 in England.³
- Smoking typically causes 730 deaths per year in Dorset⁴.
- The rate of people killed and seriously injured on the roads continues above average, probably because most Dorset has a high proportion of rural roads³.

Sources

1 Life expectancy, 2011-2013, ONS

2 Local Area Interactive Tool (LAIT). Available at: <https://www.gov.uk/government/publications/local-authority-interactive-tool-lait>

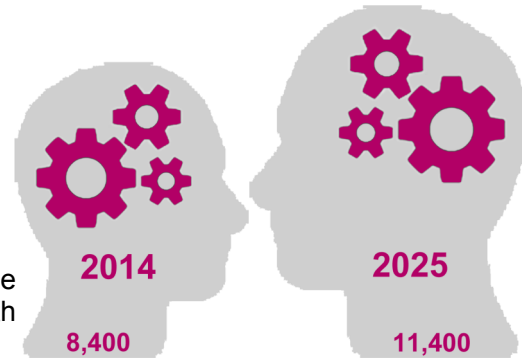
3 PHOutcomes, 2013-14

4 PHOutcomes, Health Profile 2014

Box 2: Mental health

- One in five adults experience poor mental health during their life³.
- By 2030, the number of adults aged 70+ using services for people with learning disabilities is expected to more than double⁵.
- By 2025, we expect to see more than 11,000 people aged 65 or over living with dementia locally, with the greatest increase among those aged 75+ in line with population
- Around 50 children in each school cohort are being identified as having ASC (Autistic Spectrum Condition)⁷.
- There are about 6,000 adults with an ASC in the wider Dorset population (including Bournemouth and Poole)⁸.
- Young people with a learning disability now prefer to leave the family home and move into supported living packages in the community.

People aged 65+ with dementia



Box 3: Substance abuse

The Toxic Triangle
Substance abuse



- In Dorset, admission rates for alcohol related harm doubled between 2002/03 and 2011/12 and rose again in 2012/13³.
- Illicit substance use is most common among young adults aged 16-24: but rates of use have fallen nationally in the last 15 years.
- In Dorset, for every £1 invested in adult drug treatment services, savings of £5.42 in health and crime costs are generated¹⁰.
- Domestic violence impacts on the quality of life of an estimated 10,000 people a year in Dorset, mainly women and children (13.5 incidents per 1,000 population)⁹.

Why does it matter:

Health and wellbeing influences - and can be influenced by - most aspects of our lives including how and where we live, our behaviours, our work and our leisure activities and is a common thread through these things.

Healthy populations live longer, are more productive and save more thus making a contribution to economic progress as well as personal wellbeing.

A positive perception of wellbeing is as important as good health itself and an above average proportion of Dorset residents aged 16+ have a high life satisfaction rating and feel that the things they do in their lives are worthwhile.

Local evidence can be used to anticipate need and target service provision.

Sources

5 Older people with a learning disability 2012, British Institute of Learning Disabilities
6 POPPI Projecting Older People Information
7 The Pan Dorset Adult Autistic Spectrum Condition Commissioning Strategy 2012-15

8 Estimated prevalence rate of one per cent - Brugha et al , 2007
9 Derived from Dorset Police Statistics and Dorset Community Safety Partnership
10 Calculated using the National Treatment Agency's 'Value for Money' estimation tool

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Dorset County Council

Natural and Historic Environment

Dorset's natural and historic environment makes a huge contribution to health and personal wellbeing.

Dorset's natural systems provide a wide range of essential goods (food, fuel, productive soil, clean air and water) and beneficial services (pollination, flood alleviation, climate regulation and tranquillity). These are taken for granted, but they need a combination of public, private and voluntary action to maintain them.

The contribution of our national and historic environment to the economy is often overlooked.

The importance of our natural environment limits the locations available for new development including employment land and housing.

Big Numbers Box

15%

Environmental economy contributes to regional GDP

Of all nationally protected ancient monuments are in Dorset

5%

86% Lowland heath lost since 1800

94%

Of Dorset residents think a high quality natural environment is of great importance to them

3%

Renewable energy production

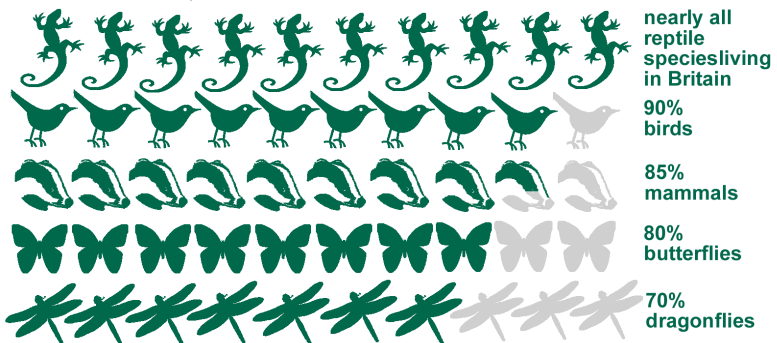
53%

Of county covered by Area of Outstanding Natural Beauty designation

Box 1: The Natural Environment

- 94% of Dorset's residents agree with the statement 'A high quality natural environment is of great importance to me' - 61% 'strongly agree'¹
- Dorset contains part of England's only natural World Heritage Site and two Areas of Outstanding Natural Beauty, covering 53% of the county².
- Whilst making up only two per cent of the area of England, Dorset holds five per cent of its nationally protected ancient monuments.
- All of the Dorset coast (excluding the town seafronts) is recognised in national or international designations for its unique landscape, scenic quality, wildlife and geological formations².

Bournemouth, Dorset and Poole are home to...



Sources

¹ Dorset Citizen's Panel 27, Dorset County Council, September 2012

² Dorset Databook 2011, Dorset County Council

Box 2: Productivity

- The 'environmental economy' of the South West (agriculture, forestry, fishing, energy and tourism) contributes 15% to regional GDP³ and over 12% of the regional economy is estimated to rely directly on the land and landscape⁴.
- 30% of the services provided by the natural environment are in decline while 60% of UK plant and animal species have declined over the last 50 years.
- Since 1800, 86% of Dorset's lowland heath has been lost to farming, forestry or development⁵ and significant areas of Dorset are classified as 'Nitrate Vulnerable Zones' hinting at pressure on the water environment.

% Dorset covered by Nitrate Vulnerable Zones



Box 3: Energy

- Between 2005 and 2012, there was an overall decrease in CO2 emissions per capita in Dorset⁶, although emissions remain well above the level considered necessary to avoid dangerous climate impacts.
- Renewable energy production has increased in Bournemouth, Dorset and Poole from 0.95% of local energy consumption in February 2011 to 3.4% in February 2015. At the same time national renewable energy generation has increase to 5.6% of total energy consumption and was 15% of electricity supply in 2014⁷.

Renewable energy production as % of all consumption



Why does it matter:

Access to the environment contributes substantially to health and wellbeing and supports active lifestyles through a wide range of recreational and cultural activities - and greater wellbeing contributes to higher productivity and economic gain.

The physical and mental health benefits of access to nature are well documented, as are the negative impacts of environmental inequality. Improving access to green infrastructure therefore offers the potential to extend these benefits, particularly in areas where access is poor.

Climate change will continue. National and international policies demand local action to mitigate and adapt to this change and the development of a greener, low-carbon economy will offer significant economic opportunities as well as environmental benefits.

Sources

3 The Natural Environment, the Rural Region and Regional Economic Development, EKOS, 2003

4 Stepping Forward, Best Foot Forward, 2005

5 Natural England/RSPB

6 Local and Regional CO2 Emissions Estimates for 2005-2012, Ricardo-AEA for DECC

7 Annual Report, Regen SW

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State of Dorset

Leisure and Culture



Dorset County Council

Participation in arts and culture makes communities feel safer and stronger, adds to health and wellbeing and reduces social isolation¹, but funding cuts are a significant threat to culture and leisure activities, particularly in the third sector.

Cultural and recreational activities can help people access the natural environment through healthy lifestyles. Sport is evidenced to result in significant savings to health costs and yet there are concerns that many of Dorset's young people are physically inactive.

Big Numbers Box

£394m

Value of creative industries to the Dorset LEP area

The value of sports to health every year in Dorset

£145m

77%

62%

People aged 14+ are physically inactive

People agree that culture makes Dorset a better place to live

£8.3m

The cost of physical inactivity in Dorset

£117m

The value of sport to Dorset

Box 1: Health and well-being value

- Overall 77% of people surveyed agree that access to cultural activities helps to make Dorset a better place to live and that engagement in cultural activities contributes to an improved quality of life².
- Levels of wellbeing are generally reported to be higher amongst those with higher arts and culture engagement¹.
- Students who study art subjects are more employable and more likely to stay in employment than graduates from other disciplines¹ and children from low income families who take part in arts at school are three times more likely to get a degree¹.
- Nationally, 78% of children who took part in a programme of daily music activity demonstrated improved performance across core subjects¹.

% children taking part in music activity demonstrating improved performance



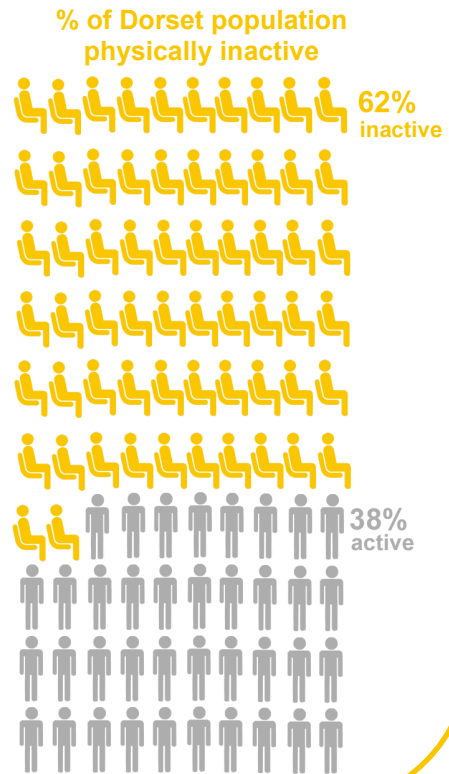
Sources

1 Create, Arts Council England, November 2014

2 Citizens Panel April 2009 Survey, Dorset County Council

Box 2: Economic Value

- 62.2% of Dorset's 14yrs+ population are physically inactive. The cost of physical inactivity is over £8.3million and rising in Dorset³.
- The total **direct economic value of sport** to Dorset is £117.4 million per annum³.
- The value of **sport volunteering** is £21.6 million per annum in Dorset³.
- The value of **sport for savings to health** is £145.1 million per annum in Dorset³.
- The value of **Creative Industries** is about £394.3 million per annum in the Dorset LEP area⁵.
- Maritime Mix, the London 2012 Cultural Olympiad by the Sea between September 2011 and September 2012⁴:
 - created the equivalent of 52 (temporary) F/T jobs
 - increased Dorset GVA by £2.5m
 - generated at least £13m for the tourism economy of Weymouth & Portland.



Why does it matter:

Culture and leisure make a positive contribution to the Dorset economy, but probably have an even more significant effect on the health and wellbeing of residents - and this has the potential to add further value to the economy by increasing productivity.

Culture and leisure are particularly significant in Dorset for the way they provide a range of ways to access and enjoy the natural environment - with personal wellbeing further enhanced through access to green space. Culture and leisure are also top areas of activity for the third sector in Dorset.



Sources

3 Sport England Local Sport Profile, 2013

4 Maritime Mix Legacy Report, June 2013

5 aGVA dataset from Annual Business Survey 2012, ONS with FTE estimates by Dorset County Council