Cheshire East Economic Profile

Contents
Population and migration ........................................................................................................ 2
Economic output ..................................................................................................................... 12
Income .................................................................................................................................. 14
Earnings ................................................................................................................................. 15
Employment ........................................................................................................................... 17
Jobs density ............................................................................................................................ 22
Commuting flows .................................................................................................................. 26
Out-of-work benefits and unemployment ............................................................................. 29
Qualifications ........................................................................................................................ 31
Self-employment ................................................................................................................... 33
Business demography .......................................................................................................... 33
Business Survey (2017) ....................................................................................................... 38
Tourism and visitor attractions ........................................................................................... 43
Housing market ...................................................................................................................... 45
Deprivation ............................................................................................................................. 55
Transport ................................................................................................................................. 58
Climate change ...................................................................................................................... 59
Economic projections ............................................................................................................ 62
Annex 1: Map of Cheshire East settlements ..................................................................... 64
Cheshire East Economic Profile

Please note:
• Many of statistics in this profile are from surveys or are modelled estimates, so they are somewhat less accurate than, for example, Census data; the survey data and modelled data also tend to be less accurate for smaller geographical areas or smaller industries and occupations than for larger ones. It is partly because of this reduced accuracy that the survey data and estimates for local authorities such as Cheshire East often show more volatility over time than the equivalent statistics for the North West region or the whole country.
• For consistency, national comparisons are generally with the UK. However, for those data sources for which comparable UK data are not available, the nearest equivalent country (England, England & Wales or Great Britain) is generally used. However, for house prices, England is used as the national comparison area, given that Northern Ireland’s housing market is so geographically and economically separate from the rest of the UK and that some housing market data is more readily available for England than for England & Wales or Great Britain.
• Throughout this profile, the geographical definitions used for each town or smaller settlement are those set out in Appendix 6 of the Cheshire East ‘LDF Background Report: Determining the Settlement Hierarchy’, Cheshire East Council, November 2010: http://www.cheshireeast.gov.uk/planning/spatial_planning/research_and_evidence/settlement_hierarchy_study.aspx. Annex 1 of this profile contains a map which labels each of these settlements and shows their boundaries.

Population and migration¹
The Office for National Statistics’ (ONS) 2017 mid-year population estimates put Cheshire East’s total population at 378,800, making it the third largest unitary or district authority in the North West after Manchester and Liverpool. Of this total population, 59.7% (226,100) were of working age (age 16 to 64). This is significantly lower than the equivalent figures for the North West (62.5%) and the UK (62.9%). 8.8% of the Borough’s residents are in the 16-24 age group, 22.1% are between 25 and 44, and 28.8% are between 45 and 64. 0-15 year-olds make up 17.8% of the population (lower than the UK figure of 18.9%) and those aged 65 and above account for the remaining 22.5% (much higher than the UK average of 18.2%).

As indicated in Figure 1, the proportions of the population in all older age groups (45-54, 55-64, 65-74, 75-84 and 85 and above) are all higher in Cheshire East than in the North West or the UK as a whole. 3.1% of the Borough’s residents are aged 85 and above, compared to a UK average of 2.4%. Conversely, all the younger age groups (0-15, 16-24, 25-34 and 35-44) make up a lower share of the population in

¹ Except where specified otherwise, the source is Office for National Statistics (ONS) mid-year population estimates for 1981-2017 (June 2018 release). ONS Crown Copyright 2018. ONS licensed under the Open Government Licence v. 3.0.
Cheshire East than in the North West or UK; this is particularly so for the 16-24 and 25-34 bands.

**Figure 1: Population shares, 2017**

![Population shares of each age group, 2017](image)

The population in Cheshire East has increased by 15.3% over the last three and a half decades, from 328,500 in 1981 (to 378,800 in 2017, as stated above). The age structure of the Borough’s population has also changed since 1981, as Figure 2 shows:

- Although the number of children (aged 0-15) fell by 7.2% and now stands at 67,400 (against 72,700 in 1981), it has stayed relatively stable (between 65,000 and 69,000) since 1983.

- The proportion aged 16-24 has decreased by 20.8% since 1981, from 42,100 to 33,400, but has stayed in the 33,000-37,000 range since 2004.

- The number of 25-44 year-olds rose from 90,200 (1981) to a peak of 100,200 (1998), but has fallen in each subsequent year and is now 83,600 (down 7.3% on the 1981 figure). The number of 25-34 year-olds (45,500 in 1981) rose to a peak of 50,700 in 1995 and 1996, but then declined to 38,900 (14.5% below its 1981 level) by 2017. The number of people aged 35-44 (44,700 in 1981) peaked at a much later date (reaching 57,200 in 2006), but has since contracted in each successive year, falling to 44,700 by 2017 (matching its 1981 level).
• The 45-64 population has grown almost continuously, from 75,600 (1981) to 109,100 (2017) – an increase of 44.3%.

• The number of older people (aged 65 and above) has increased by 78.3%, rising in every consecutive year from 1984 onwards, from 47,900 in 1981 to 85,300 in 2017.

• The total working age (16 to 64) population increased by 8.7% between 1981 and 2017, rising from 207,900 (1981) to a peak of 233,700 (2008), but then contracting in nearly every year since then, to reach 226,100 in 2017.

Figure 3 shows how Cheshire East compares to the UK in terms of 2001-17 population trends for broad age groups (0-15, 16-64 and 65 and above) and the total population. As it indicates, the number of Cheshire East residents in the oldest of these groups (age 65 and above) has grown much faster than at UK level, but the decline (since 2008) in the Borough’s working age population and the minimal change in its number of 0-15 year-olds are in contrast to the trend for the UK (which has seen both age groups growing steadily in number in recent years, albeit with the working age population’s growth rate slowing down after 2011).

Figure 2: Population change in Cheshire East, by age group, 1981-2017

![Population change in Cheshire East, by age group (1981 = 100)](chart)

The average annual rate of population growth has varied over this time, picking up in the early 2000s, but then slowing down. For 1981-2001, it averaged 0.3% per annum (pa), but was higher during 2001-6 (0.6% pa) and 2006-11 (0.5% pa) before slowing again during 2011-17 (to 0.4% pa). For 2001-17 as a whole, the average was 0.5% pa.

As Table 1 shows, the sharpest decline over the 1981-2001 period occurred in the 16-24 age group, but in 2001-6 the fastest contraction was amongst 25-34s. From 2006 onwards it was 35-44s whose numbers decreased at the quickest rate, with this group’s rate of decline accelerating (from an average of 1.8% pa during 2006-11 to an average of 2.5% pa over the 2011-17 period). Table 1 also shows that the number of 45-64s continued to grow between 2011 and 2017, but at a much slower rate than before (0.5% pa, compared to over 1% pa for 2001-6 and 2006-11). It appears that, as time goes on, the fastest declines are concentrated in older age groups than before and that the 45-64 age band could next be the one facing rapid population decrease. It is also notable that the contraction of the 25-34 population appears to have come to an end (with 2011-17 seeing average growth of 0.2% pa for this age group).
It may be that in-migration explains some of these trends: for example, if recent in-migrants are predominantly young or if recent out-migrants are predominantly middle-aged or old, that could account in part for population decline becoming more prevalent among older age groups. However, more analysis would be needed to support or refute this possible explanation.

Table 1: Average population growth per annum (%) in Cheshire East, by age group

<table>
<thead>
<tr>
<th>Period</th>
<th>All ages</th>
<th>0 to 15</th>
<th>16 to 24</th>
<th>25 to 34</th>
<th>35 to 44</th>
<th>45 to 64</th>
<th>65 and above</th>
</tr>
</thead>
<tbody>
<tr>
<td>1981-2001</td>
<td>0.3%</td>
<td>-0.3%</td>
<td>-1.4%</td>
<td>-0.1%</td>
<td>1.0%</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td>2001-6</td>
<td>0.6%</td>
<td>-0.3%</td>
<td>1.8%</td>
<td>-2.2%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.4%</td>
</tr>
<tr>
<td>2006-11</td>
<td>0.5%</td>
<td>-0.6%</td>
<td>1.1%</td>
<td>-0.5%</td>
<td>-1.8%</td>
<td>1.3%</td>
<td>2.4%</td>
</tr>
<tr>
<td>2011-17</td>
<td>0.4%</td>
<td>0.4%</td>
<td>-1.5%</td>
<td>0.2%</td>
<td>-2.5%</td>
<td>0.5%</td>
<td>2.9%</td>
</tr>
</tbody>
</table>


For the more recent part of this period (2001-17) at least, net inward migration has been the main contributor to population growth, as indicated by Figure 4. Over this sixteen-year period, the Borough’s population increased by 26,700, with net internal migration (people moving between Cheshire East and another part of the UK) accounting for 19,200 (72%) of this change and net international migration (people moving between Cheshire East and a foreign country) for a further 3,000 (11%). Altogether, therefore, net migration added 22,300 to the Borough’s population total over the 2001-17 period and this equates to 83% of the total population change. Natural change (births net of deaths) contributed an additional 2,700 (10%) and other change3 contributed the remaining 1,700 (7%). For the latter four years of this period (2013-17), overall population growth was 5,800, with net internal migration (5,300, or 91% of the total change) again being by far the main contributor, followed by net international migration (300, or 5% of the total) and natural change (200, or 4%).3

However, the contribution from natural change has fluctuated considerably over the whole 2001-17 period, rising to 31% (2009-13) before falling back. It is also notable, as Figure 4 shows, that net international migration contributed a far greater proportion of overall population change during 2005-9 (25%) than in any other part of the 2001-17 period. That partly reflects the fact that, in the years following the 2004 EU expansion, there were large inflows of migrant workers from Eastern Europe, many of whom have remained within Cheshire East. This is demonstrated by 2011 Census data, which indicate that 3,900 Cheshire East residents (1.0% of all the Borough’s residents) were born in Poland. This represents a dramatic increase on

---

2 As noted in the Statistical Bulletin accompanying the Office for National Statistics’ 2017 mid-year population estimates, ‘Other change’ includes “changes to the size of armed forces stationed in the geographical area in question and other special population adjustments”.
the number of Polish-born residents at the time of the 2001 Census (200). The 2011 Census also indicates that a total of 20,300 people (5.5% of Cheshire East residents) were born outside the UK (up from 13,000 in 2001), with Poland accounting for the largest number of non-UK births, followed by Ireland (1,800), India (1,400) and Germany (1,200).4

**Figure 4: Contributions to population change in Cheshire East**

Principal concentrations of population (based on the 2016 mid-year population estimates) are in the towns of Crewe (73,900), Macclesfield (52,400), Congleton (26,700) and Wilmslow (24,500).5 The Borough’s other main towns – each with a population between 10,000 and 20,000 – are Alsager (11,700), Knutsford (13,300), Middlewich (14,200), Nantwich (18,600), Poynton (12,800) and Sandbach (19,000).6

The map in Figure 5 shows how 0-15 year-olds’ share of the population varies by settlement, as of 2016; Figures 6 and 7 present the same kind of information, but for 16-64 year-olds and those aged 65 and above.

---

4 2011 Census (Table QS203EW) and 2001 Census (Table S015), ONS. Crown Copyright 2018.
5 As stated at the start of this Economic Profile, the geographical definitions used for each town or smaller settlement are those set out in Appendix 6 of the Cheshire East ‘LDF Background Report: Determining the Settlement Hierarchy’, Cheshire East Council, November 2010: [http://www.cheshireeast.gov.uk/planning/spatial_planning/research_and_evidence/settlement_hierarcy_study.aspx](http://www.cheshireeast.gov.uk/planning/spatial_planning/research_and_evidence/settlement_hierarcy_study.aspx)
6 Office for National Statistics (ONS) 2016 mid-year population estimates for small areas (October 2017 release). ONS Crown Copyright 2018. ONS licensed under the Open Government Licence v. 3.0.
As these maps demonstrate, the settlements with the highest concentrations of 0-15s are the Borough’s two largest towns, along with some of its smaller towns (Knutsford, Middlewich and Wilmslow); in contrast, all the areas with the lowest proportions of 0-15s are villages and rural locations (Figure 5).

The working age population, 16-64 year-olds, forms a relatively large share of the population in Crewe, Macclesfield and Middlewich. 16-64s are least well represented in some of the smaller settlements, but also in the towns of Poynton and (to a lesser extent) Alsager and Knutsford (Figure 6).

It follows from this that people aged 65 and above make up a low proportion of the total population in Crewe, Macclesfield and Middlewich; the same is also true for Wilmslow. This age group’s population share is greatest in some of the Borough’s villages, but also (to a lesser extent) in Alsager and Poynton (Figure 7).

In general, therefore, the larger the settlement, the younger its population tends to be, with Crewe and Macclesfield – and also the smaller towns of Middlewich and Wilmslow – having particularly high proportions of under-65s. The oldest populations are found in small settlements, but also in Alsager and Poynton; these locations (and Knutsford) are the ones where the working-age population accounts for a relatively low share of the total.

As of 2016, more than a third (37.1%) of the population lives in areas that are classified as being more rural than urban. The rural population is more heavily concentrated in older age groups: for example, 57.1% of rural residents are aged 45 and above, whereas only 47.3% of urban residents fall into this broad age group.7

The latest population projections – which were produced for Cheshire East’s Local Plan and which cover the full Plan period of 2010-30 – point to population growth of 15.7% between 2010 and 2030. These projections suggest there will be an increase for all broad age groups, but with much faster growth in the population aged 65 and above (up 64.9% between 2010 and 2030) than in the number aged 0-15 (up 12.0%) or 16-64 (up 1.9%). Population growth is projected to be particularly high for the 85 and above age group (133.8%).8

8 Population forecasts produced by Opinion Research Services (ORS) for the Cheshire East Housing Development Study 2015, ORS, June 2015, Local Plan Examination Library Reference PS E033: http://cheshireeast-consult.limehouse.co.uk/portal/planning/cs/library

OFFICIAL
Figure 5: Proportion (%) of population aged 0 to 15, by settlement
Figure 6: Proportion (%) of population aged 16 to 64, by settlement
Figure 7: Proportion (%) of population aged 65 and above, by settlement
Economic output

Cheshire East’s total Gross Value Added (economic output) was estimated to be £12.2bn in 2016. Between 1997 and 2016, the Borough’s GVA growth averaged 2.2% a year in real (inflation-adjusted) terms, which is significantly faster than the growth rates for the North West (1.7%) and the UK (2.0%) over the same period. Figure 8 shows how the real GVA growth rates in these three geographical areas broadly matched each other up until about 2011; since then, however, Cheshire East’s growth rate has significantly outpaced that of the UK, which in turn outperformed the North West region. More specifically, for the 2011-16 period, the Borough’s real GVA growth averaged 3.8% per annum, far exceeding the rates achieved in the North West (1.9%) and the UK (2.2%). Whilst this suggests Cheshire East is, overall, enjoying a period of strong economic expansion, GVA and other economic output measures are notoriously difficult to estimate - particularly so for smaller geographical areas - and therefore the size of the growth rate gap (between Cheshire East and the region or the UK) should be regarded with some caution.

In 2016, Cheshire East’s GVA per head was £33,300, or 26.4% above the UK average (£26,300) and further above the North West (£22,900). The gap between Cheshire East and the UK has generally widened since 1997 (when Cheshire East exceeded the UK average by 15.0%). This is partly a consequence of total GVA growth during 1997-2016 being faster in Cheshire East than in the UK, although differences between local and national population growth will also be a factor.

---

9 [1] Regional Gross Value Added (Income Approach) UK 1997-2016 data, Office for National Statistics (ONS), December 2017. [2] Data series ABML and ABMM, from the time series dataset released as part of the ‘Quarterly National Accounts: Quarter 3 (July to Sept) 2017’ ONS Statistical Bulletin, Dec 2017. Notes: [1] The monetary figures quoted above are in 2016 prices; figures for GVA are rounded to the nearest £0.1bn and figures for GVA per head are rounded to the nearest £100. However, the underlying calculations are based on unrounded data. [2] “Extra-Regio” GVA (UK economic activity that cannot be assigned to specific regions, e.g. the activities of foreign embassies) is excluded from the UK figures/ comparisons reported above.
Figure 8: Real GVA growth, 1997-2016

![Real GVA (Gross Value Added) index (1997 = 100)](chart)

Income

Average household income is also high compared to the region and UK. Gross disposable household income (GDHI) per head of population was £22,000 in 2016 – 13.3% higher than in the UK as a whole (£19,400) and even further above the North West average (£16,800). Since 1997, Cheshire East’s GDHI per head has stayed consistently above the UK average (see Figure 9), although the gap has varied between 8.4% and 15.1% over that time and not followed any clear long-term trend.¹⁰

Figure 9: Gross disposable household income per head, 1997-2016

Household income data for 2017 are also available both for Cheshire East as a whole and for smaller geographical areas, such as settlements and wards. These figures¹¹ (which are per household, rather than per head) put the Borough’s median household income at £35,800, or 16.2% above the UK median (£30,800) and 31.7%

¹⁰ ‘Regional gross disposable household income 1997 to 2016’ data tables, Office for National Statistics (ONS), May 2018. Note: Figures are in nominal prices (i.e. with inflation included).
¹¹ Source: PayCheck data, © Copyright 1996-2017 CACI Limited. This Report shall be used solely for academic, personal and/or non-commercial purposes. Note: The figures for settlements are pseudo medians, rather than true medians. The pseudo medians are calculated by creating an array for each geographical area. The array is produced by duplicating the median income at postcode level n times, where n is the number of households with that postcode, and then repeating this process for each postcode within the geographical area. For example, if a certain postcode contained eight households and these had a reported median income of £35,186, this would result in the figure £35,186 being listed eight times in the array (or more than eight times if other postcodes happened to have exactly the same median figure). The pseudo median is then the median figure of this array. A true median would be calculated using a separate household income figure for each household; however, the income data are available only down to postcode level, not for individual households.
higher than the North West (£27,200). However, at settlement level, income is below the UK median in two of the Borough’s 24 main towns and settlements: Crewe (£26,300, or 14.7% below the UK and 26.6% below the Cheshire East median) and Handforth (£30,300, or 1.8% less than the UK and 15.5% short of the Cheshire East median). At the other end of the spectrum, median household income exceeds £55,000 in three of these 24 towns and settlements: Prestbury (£65,100, or 81.7% above the Cheshire East median), Alderley Edge (£59,000) and Goostrey (£56,200). Median household income is also relatively high (£46,200, or 29.0% above the Cheshire East median) in the area outside the Borough’s main 24 settlements.

**Earnings**

For full-time employees working in Cheshire East, median gross weekly pay was estimated at £529.00 as of 2017: this exceeds the North West average (£514.00), but is significantly less than for the UK as a whole (£550.40). For this measure of earnings, Cheshire East’s position relative to the UK has not changed dramatically over the last decade, as Figure 10 shows.

**Figure 10: Median gross weekly earnings of full-timers (workplace-based)**

![Median gross weekly earnings of full-timers (workplace-based)](chart)

However, for those full-time employees who live in the Borough, median gross weekly earnings (£562.10) are slightly higher the equivalent figure for the UK (£550.40) and much higher than those of full-timers living in the North West (£514.50). For this residence-based earnings measure, Cheshire East has generally matched or (slightly) exceeded the UK median over the last ten years, as shown in Figure 11.

---

12 Annual Survey of Hours and Earnings: 2017 provisional and 2016 revised results, Office for National Statistics (ONS), NOMIS, October 2017. Note: Figures include overtime.
Since 2008 (the earliest year for which figures are available), the earnings of full-timers living in the Borough have been consistently above (between 4.2% and 13.0% higher than) those of full-time employees who work in Cheshire East (although this differential between residence- and workplace-based earnings has not followed any obvious trend during that period). In other words, people who work in Cheshire East earn more, on average, than the people who live here.\textsuperscript{13}

Between 2008 and 2017, the median gross weekly pay of full-time employees working in the Borough increased by an average of 1.3% per annum, which was lower than the equivalent growth rates for the North West (1.5% pa) and UK (1.6% pa). Full-time employees living in Cheshire East saw their median gross weekly earnings rise by an average of 1.2% pa over this time.

\textbf{Figure 11: Median gross weekly earnings of full-timers (residence-based)}

\begin{figure}
\includegraphics[width=\textwidth]{median_gross_weekly_earnings_full_timers_residence_based}
\caption{Median gross weekly earnings of full-timers (residence-based)}
\end{figure}

\textsuperscript{13} But obviously the two groups partly overlap.
Employment

Employment trend and employment by status and gender\textsuperscript{14}

By 2016, there were an estimated 195,000 people working in Cheshire East, according to the Office for National Statistics' (ONS) Business Register and Employment Survey (BRES). This total grew by an estimated 11.2% between 2010 and 2015, which exceeds the reported employment growth rates for the North West and Great Britain over the same time period (4.8% and 6.8% respectively), as shown in Figure 12.

Figure 12: Employment growth, 2010-15

Between 2015 and 2016, Cheshire East’s employment total increased by a further 2.6%, which was higher than the 2015-16 employment growth seen in the region (2.3%) and Great Britain (1.6%).

\textsuperscript{14} Except where otherwise specified, the sources used are the Business Register and Employment Survey (BRES) open access data series for 2009-15, ONS, NOMIS. Crown Copyright 2018. Notes: [1] Figures are for employment and include self-employed people registered for VAT and PAYE schemes as well as employees. [2] Cheshire East figures exclude farm-based agriculture.
Of those employees working in Cheshire East in 2016, around two thirds (67.4%) had full-time posts (with the rest being part-time). This proportion is very similar to the averages for the region (67.0%) and Great Britain (67.8%).

2011 Census data indicate that, of those people working in Cheshire East, the majority (52.8%) are male. The Census results also indicate that a majority of both female employees (57.3%) and particularly male employees (89.5%) work full-time as opposed to part-time.\(^{15}\)

Employment by industry
Table 2 lists the proportion of Cheshire East-based employment in each broad industrial group, whilst Figure 13 presents the same data in chart form. As they show, Manufacturing is estimated to account for more than a tenth (11.3%) of jobs in the Borough, as do Wholesale & Retail (14.4% share), Professional, Scientific & Technical Services (12.8%) and the Health & Social Work sector (11.8%).

<table>
<thead>
<tr>
<th>UK Standard Industrial Classification 2007 (SIC2007) description and Section code(s)</th>
<th>Cheshire East</th>
<th>North West</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry &amp; Fishing; Mining &amp; Quarrying; Utilities (A, B, D and E)</td>
<td>1.8</td>
<td>2.4</td>
<td>2.8</td>
</tr>
<tr>
<td>Manufacturing (C)</td>
<td>11.3</td>
<td>9.7</td>
<td>7.9</td>
</tr>
<tr>
<td>Construction (F)</td>
<td>3.6</td>
<td>4.1</td>
<td>4.7</td>
</tr>
<tr>
<td>Wholesale &amp; Retail (G)</td>
<td>14.4</td>
<td>15.3</td>
<td>15.2</td>
</tr>
<tr>
<td>Transport &amp; Storage (H)</td>
<td>5.6</td>
<td>5.5</td>
<td>4.8</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services (I)</td>
<td>8.7</td>
<td>7.9</td>
<td>7.4</td>
</tr>
<tr>
<td>Information &amp; Communication (J)</td>
<td>3.6</td>
<td>2.7</td>
<td>4.1</td>
</tr>
<tr>
<td>Financial &amp; Insurance (K)</td>
<td>4.6</td>
<td>2.9</td>
<td>3.5</td>
</tr>
<tr>
<td>Property (L)</td>
<td>1.5</td>
<td>1.7</td>
<td>1.7</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services (M)</td>
<td>12.8</td>
<td>8.5</td>
<td>8.7</td>
</tr>
<tr>
<td>Business Administration &amp; Support Services (N)</td>
<td>7.2</td>
<td>8.4</td>
<td>8.8</td>
</tr>
<tr>
<td>Public Administration &amp; Defence (O)</td>
<td>2.1</td>
<td>4.3</td>
<td>4.2</td>
</tr>
<tr>
<td>Education (P)</td>
<td>7.2</td>
<td>8.7</td>
<td>8.6</td>
</tr>
<tr>
<td>Health &amp; Social Work (Q)</td>
<td>11.8</td>
<td>14.1</td>
<td>13.0</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation (R)</td>
<td>2.1</td>
<td>2.2</td>
<td>2.5</td>
</tr>
<tr>
<td>Other Service Activities (S,T and U)</td>
<td>1.8</td>
<td>1.6</td>
<td>2.1</td>
</tr>
</tbody>
</table>


There are two broad industrial groups that account for a much larger employment share in Cheshire East than they do at national (Great Britain) level, namely

---

Manufacturing (11.3% locally, versus 7.9% for Great Britain), and Professional, Scientific & Technical Services (12.8% versus 8.7%). This in part reflects the presence of major manufacturing sites such as those operated by car manufacturer Bentley (Crewe)\(^{16}\), the pharmaceutical firms AstraZeneca (Macclesfield)\(^{17}\) and Sanofi (Holmes Chapel)\(^{18}\) and the engineering company Siemens (Congleton)\(^{19}\). It also reflects the historic strength of Research & Development activity in Cheshire East, most obviously in the form of AstraZeneca’s Alderley Park site.

Until recently, Alderley Park was AstraZeneca’s main global R&D facility and the firm’s Macclesfield (Hursfield Industrial Estate) manufacturing plant, where 1,800 people work, is another major local employer. However, in 2013, the firm announced that it would cease R&D operations at Alderley Park by 2016. About 1,600 jobs were to be transferred: most of these were to be moved to a new global R&D centre and corporate HQ in Cambridge (which became the company’s global HQ in May 2016); and the rest either to the firm’s Macclesfield site or abroad. At least 700 jobs were due to stay at Alderley Park, but these do not involve R&D work. However, the company sold the site to Manchester Science Partnerships, a public-private partnership which is keen to ensure that the site remains a key centre for life science, pharmaceutical and biotechnology activity and which has set up a BioHub at Alderley Park.\(^{20}\)

The Bentley site, where more than 4,000 people work\(^{21}\), is also of major significance. In addition, Cheshire East is now a key global centre for mass spectrometry – a laboratory technology for analysing the composition of very small quantities of matter - following the opening of Waters Corporation’s new Wilmslow facility in 2014. The new site employs more than 500 people.\(^{22}\)

Some other sectors also have an employment share that is higher locally than nationally, namely Transport & Storage (5.6% share in Cheshire East), Accommodation & Food Services (8.7%) and the Financial & Insurance sector (4.6%). The latter sector includes some large local employers, such as Royal London - which currently employs around 1,200 people at its main office in Wilmslow (but is...
relocating to nearby Alderley Park in 2019)\textsuperscript{23} - and Barclays’ technology centre at Radbroke Hall (near Knutsford)\textsuperscript{24}.

**Figure 13: Employment shares (%) by broad industrial group (SIC2007), in 2016**

At a more detailed sector level, the Office for National Statistics’ latest (2016) data from its BRES survey\textsuperscript{25} indicate that Pharmaceuticals manufacturing\textsuperscript{26} accounts for


20
1.5% of Cheshire East’s employment, or fifteen times the sector’s employment share (0.1%) at national (Great Britain) level. The same data suggest that motor vehicle manufacturing makes up 2.6% of the Borough’s employment, which is five times higher than that sector’s share (0.5%) of Great Britain’s employment total. This evidence reflects the major contribution that AstraZeneca, Sanofi and Bentley make to Cheshire East’s employment base.

**Employment by occupation**

**Figure 14: Employment by occupation (workplace-based), 2017/18**

Of those people working in the Borough in 2017/18, nearly half (48.2%) were employed in high-skill occupations (managerial, professional and associate professional/technical occupations). This proportion is above the UK average (45.5%). The proportion working in administrative & secretarial jobs (10.7%) is

---

26 In other words, these figures exclude Pharmaceuticals R&D.
27 Pharmaceuticals manufacturing is defined for the purposes of these statistics as all activities that fall under the UK Standard Industrial Classification 2007 (SIC2007) code 21 and motor vehicle manufacturing as all activities within SIC2007 code 29.
28 Annual Population Survey workplace and residence analysis data sets, April 2017 – March 2018, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018. For the purposes of this commentary, “2017/18” means the 12-month period ending in March 2018. The analysis described above is based on ONS’ Standard Occupational Classification 2010 (SOC2010) Major Groups: “high-skill” occupations means SOC2010 Major Groups 1-3 and “low-skill or elementary occupations” means Major Groups 8-9, whilst “caring, leisure, sales and customer service occupations” means Major Groups 6-7; “administrative & secretarial” is Major Group 4 and “skilled trades occupations” is Major Group 5.
similar to the national average (10.4%), as is the share contributed by skilled trades occupations (10.4% locally and 10.3% in the UK). Conversely, only 14.9% work in low-skill or elementary occupations (against 17.0% for the UK) and only 15.7% are employed in caring, leisure, sales and customer service occupations (compared to 16.8% nationally).

Among employed people who live in Cheshire East, high-skill occupations are even more prevalent (51.6% share in 2017/18, compared to 45.6% of employed people who live in the UK). This suggests that many higher-skilled residents commute outwards to jobs located outside the Borough.

Figure 15: Employment by occupation (residence-based), 2017/18

Jobs density
Jobs density is defined as the number of filled jobs in an area divided by the number of working-age residents in that area. High job densities indicate that demand for labour exceeds supply. The shortfall may be met by inward commuting. Conversely, many of those living in areas with a low jobs density may have to commute to work in other areas. The latest (2016) figures put the Borough’s jobs density at 0.98, which is considerably higher than the densities for the North West (0.81) and the UK (0.84). Cheshire East’s jobs density has also risen sharply in recent years: between 2000 and 2012, it stayed between 0.80 and 0.85, but then grew significantly in 2013 (to 0.88), 2014 (0.91) and 2015 (0.96) and rose again in 2016.29

29 Jobs density data, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018.
Table 3 uses a different measure of jobs (employment statistics from the Office for National Statistics’ Business Register and Employment Survey) to estimate jobs density at settlement level. (However, because of its use of different data, the density figures in this table should not be directly compared to the Cheshire East, North West or UK statistics quoted in the previous paragraph.)

As Table 3 shows, some of the Borough’s towns have a relative abundance of jobs, most notably Knutsford, which has the highest jobs density of any Cheshire East settlement (1.60). Handforth also hosts significantly more jobs than working-age residents, as do the smaller settlements of Alderley Edge and Bunbury and the “Other Settlements and Rural Areas” (“OSRA”) part of the Borough (the area that lies outside the main 24 settlements). However, some Cheshire East towns have a substantial shortage of jobs, particularly Alsager (jobs density of 0.46), Congleton (0.58), Middlewich (0.67), Poynton (0.50) and Sandbach (0.70), along with some smaller settlements.

Figure 16 presents the same jobs density data in map form. As it shows, the settlements with relatively high densities are predominantly in the north of the Borough (in an arc stretching from Knutsford to Macclesfield) or in the south (Crewe, Nantwich and Bunbury). In contrast, almost all of the settlements in between – Alsager, Congleton, Goostrey, Haslington, Holmes Chapel, Middlewich and Sandbach – have relatively low densities.
Table 3: Employment, 16-64 population and jobs density, by settlement, 2016

<table>
<thead>
<tr>
<th>Settlement name</th>
<th>Employment, 2016</th>
<th>Working-age (16-64) population, 2016</th>
<th>Jobs density, 2016</th>
<th>% share of Cheshire East employment total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alderley Edge</td>
<td>4,000</td>
<td>3,200</td>
<td>1.27</td>
<td>2.1</td>
</tr>
<tr>
<td>Alsager</td>
<td>3,000</td>
<td>6,500</td>
<td>0.46</td>
<td>1.5</td>
</tr>
<tr>
<td>Audlem</td>
<td>1,250</td>
<td>2,300</td>
<td>0.55</td>
<td>0.6</td>
</tr>
<tr>
<td>Bollington</td>
<td>3,500</td>
<td>4,700</td>
<td>0.75</td>
<td>1.8</td>
</tr>
<tr>
<td>Bunbury</td>
<td>1,750</td>
<td>1,200</td>
<td>1.42</td>
<td>0.9</td>
</tr>
<tr>
<td>Chelford</td>
<td>500</td>
<td>600</td>
<td>0.78</td>
<td>0.3</td>
</tr>
<tr>
<td>Congleton</td>
<td>9,000</td>
<td>15,500</td>
<td>0.58</td>
<td>4.6</td>
</tr>
<tr>
<td>Crewe</td>
<td>40,000</td>
<td>46,900</td>
<td>0.85</td>
<td>20.5</td>
</tr>
<tr>
<td>Disley</td>
<td>1,000</td>
<td>2,800</td>
<td>0.36</td>
<td>0.5</td>
</tr>
<tr>
<td>Goostrey</td>
<td>1,500</td>
<td>2,100</td>
<td>0.72</td>
<td>0.8</td>
</tr>
<tr>
<td>Handforth</td>
<td>5,000</td>
<td>4,000</td>
<td>1.25</td>
<td>2.6</td>
</tr>
<tr>
<td>Haslington</td>
<td>900</td>
<td>2,900</td>
<td>0.31</td>
<td>0.5</td>
</tr>
<tr>
<td>Holmes Chapel</td>
<td>2,250</td>
<td>3,100</td>
<td>0.72</td>
<td>1.2</td>
</tr>
<tr>
<td>Knutsford</td>
<td>12,000</td>
<td>7,500</td>
<td>1.60</td>
<td>6.2</td>
</tr>
<tr>
<td>Macclesfield</td>
<td>28,000</td>
<td>32,700</td>
<td>0.86</td>
<td>14.4</td>
</tr>
<tr>
<td>Middlewich</td>
<td>6,000</td>
<td>8,900</td>
<td>0.67</td>
<td>3.1</td>
</tr>
<tr>
<td>Mobberley</td>
<td>1,250</td>
<td>1,700</td>
<td>0.74</td>
<td>0.6</td>
</tr>
<tr>
<td>Nantwich</td>
<td>9,000</td>
<td>10,900</td>
<td>0.82</td>
<td>4.6</td>
</tr>
<tr>
<td>Poynton</td>
<td>3,500</td>
<td>7,000</td>
<td>0.50</td>
<td>1.8</td>
</tr>
<tr>
<td>Prestbury</td>
<td>1,750</td>
<td>1,900</td>
<td>0.94</td>
<td>0.9</td>
</tr>
<tr>
<td>Sandbach</td>
<td>8,000</td>
<td>11,500</td>
<td>0.70</td>
<td>4.1</td>
</tr>
<tr>
<td>Shavington</td>
<td>800</td>
<td>2,200</td>
<td>0.36</td>
<td>0.4</td>
</tr>
<tr>
<td>Wilmslow</td>
<td>14,000</td>
<td>14,700</td>
<td>0.95</td>
<td>7.2</td>
</tr>
<tr>
<td>Wrenbury</td>
<td>450</td>
<td>1,200</td>
<td>0.37</td>
<td>0.2</td>
</tr>
<tr>
<td>Other Settlements and Rural Areas (OSRA)</td>
<td>37,000</td>
<td>29,900</td>
<td>1.24</td>
<td>19.0</td>
</tr>
</tbody>
</table>


Notes: [1] BRES (and hence jobs density) figures include working owners - self-employed people registered for VAT and PAYE schemes - as well as employees, but exclude farm-based agriculture. Self employed people not registered for these schemes, along with HM Forces and Government supported trainees, are excluded. [2] Population estimates are rounded to the nearest 100, jobs densities to 2 decimal places and employment numbers according to ONS BRES rounding rules. The jobs densities were calculated using the rounded employment numbers.
Figure 16: Jobs densities in Cheshire East settlements, 2016


Commuting flows
In 2011, the largest commuting inflows into Cheshire East were from Cheshire West & Chester (around 9,050) and Stockport (around 8,550), as Table 4 shows. Several other local authorities also accounted for inflows of over 3,000, namely Manchester, Newcastle-under-Lyme, Staffordshire Moorlands and Stoke-on-Trent. In other words, Cheshire West & Chester, the southern part of Greater Manchester and Stoke/ North Staffordshire are the Borough’s primary sources of imported labour.

The largest outflows were to Manchester (about 9,450), Cheshire West & Chester (8,000) and Stockport (6,800). Two other local authorities also received over 3,000 inward commuters from Cheshire East, namely Trafford and Stoke-on-Trent. Hence Cheshire West & Chester, the southern part of Greater Manchester and Stoke/ North Staffordshire are the primary destinations for Cheshire East’s outward commuters – so the travel-to-work flows between Cheshire East and these neighbours are very significant in both directions.

In terms of net flows involving Cheshire East, the net flow to Manchester was by far the greatest, with outflows (from Cheshire East) exceeding inflows (to Cheshire East) by 5,300. Cheshire East had no other net outflows in excess of 1,000. However, there were net inflows of over 1,000 from four neighbours: Cheshire West & Chester (1,050), Stockport (1,750), Newcastle-under-Lyme (1,900) and Staffordshire Moorlands (2,800).

The largest 2001-11 change in commuting flows involved Manchester, as Table 5 shows. Between 2001 and 2011, the number of inward commuters from Manchester rose by 1,600 - the greatest change in inflows from any neighbouring authority (the next largest change was a 1,000 increase in inflows from Stoke-on-Trent). The number of Cheshire East residents commuting to a Manchester workplace fell by 600 – which again was larger (albeit slightly) than the change in outflows to any other neighbour.

Hence the net outflow to Manchester, although still high in 2011, declined by 2,200 between 2001 and 2011. The net inflow from Newcastle-under-Lyme increased by 1,200, but for all the other net flows involving neighbours, the 2001-11 change was 750 or less.

The 2001-11 change analysis also shows that, for almost all of the neighbouring authorities, there was an increase – often a substantial increase - in net inflows into Cheshire East. In other words, the Borough was a much greater net importer of labour from its neighbours in 2011 than it was in 2001.

Adding all commuting flows together (whether they involved neighbouring authorities or not), there was a net outflow of 4,100 (from Cheshire East to other workplaces) in 2001, but by 2011 this had changed to a net inflow of 1,400. In other words, over the 2001-11 period, Cheshire East shifted from being an overall net exporter of labour to being an overall net importer.\(^{30}\)

\(^{30}\) Figures based on the data sources listed below Table 5.
Table 4: Largest commuting flows to and from Cheshire East, 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>Local Authority (LA)</th>
<th>Gross inflow into Cheshire East (from the LA in question)</th>
<th>Gross outflow from Cheshire East (to the LA in question)</th>
<th>Net inflow into Cheshire East (from the LA in question)</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Midlands</td>
<td>High Peak</td>
<td>1,700</td>
<td>850</td>
<td>850</td>
</tr>
<tr>
<td>North West</td>
<td>Cheshire West and Chester</td>
<td>9,050</td>
<td>8,000</td>
<td>1,050</td>
</tr>
<tr>
<td>North West</td>
<td>Halton</td>
<td>500</td>
<td>700</td>
<td>-200</td>
</tr>
<tr>
<td>North West</td>
<td>Manchester</td>
<td>4,150</td>
<td>9,450</td>
<td>-5,300</td>
</tr>
<tr>
<td>North West</td>
<td>Salford</td>
<td>750</td>
<td>1,250</td>
<td>-550</td>
</tr>
<tr>
<td>North West</td>
<td>Stockport</td>
<td>8,550</td>
<td>6,800</td>
<td>1,750</td>
</tr>
<tr>
<td>North West</td>
<td>Tameside</td>
<td>1,150</td>
<td>600</td>
<td>500</td>
</tr>
<tr>
<td>North West</td>
<td>Trafford</td>
<td>2,800</td>
<td>3,500</td>
<td>-700</td>
</tr>
<tr>
<td>North West</td>
<td>Warrington</td>
<td>2,000</td>
<td>2,050</td>
<td>-50</td>
</tr>
<tr>
<td>North West</td>
<td>Wigan</td>
<td>650</td>
<td>300</td>
<td>350</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Newcastle-under-Lyme</td>
<td>4,550</td>
<td>2,650</td>
<td>1,900</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Shropshire</td>
<td>1,100</td>
<td>850</td>
<td>250</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Staffordshire Moorlands</td>
<td>3,650</td>
<td>850</td>
<td>2,800</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Stoke-on-Trent</td>
<td>3,750</td>
<td>4,050</td>
<td>-300</td>
</tr>
</tbody>
</table>

Source: Table WU01UK (Location of usual residence and place of work by sex), Origin Destination Tables, 2011 Census, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018. Notes: [1] Figures relate to all usual residents aged 16 and over in employment. [2] To protect against disclosure of personal information, ONS has swapped some records between different geographic areas. Some counts will be affected, particularly small counts for small areas. [3] Figures rounded to nearest 50. [4] This table covers all those neighbouring or nearby authorities for which either the gross inflow or the gross outflow is at least 500 (before being rounded off).
Table 5: Change in commuting flows to and from Cheshire East, 2001-11

<table>
<thead>
<tr>
<th>Region</th>
<th>LA</th>
<th>2001-11 change in gross inflow into Cheshire East (from the LA in question)</th>
<th>2001-11 change in gross outflow from Cheshire East (to the LA in question)</th>
<th>2001-11 change in net inflow into Cheshire East (from the LA in question)</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Midlands</td>
<td>High Peak</td>
<td>100</td>
<td>250</td>
<td>-150</td>
</tr>
<tr>
<td>North West</td>
<td>Cheshire West and Chester</td>
<td>600</td>
<td>550</td>
<td>50</td>
</tr>
<tr>
<td>North West</td>
<td>Manchester</td>
<td>1,600</td>
<td>-600</td>
<td>2,200</td>
</tr>
<tr>
<td>North West</td>
<td>Oldham</td>
<td>100</td>
<td>100</td>
<td>-50</td>
</tr>
<tr>
<td>North West</td>
<td>Salford</td>
<td>150</td>
<td>-150</td>
<td>300</td>
</tr>
<tr>
<td>North West</td>
<td>Stockport</td>
<td>200</td>
<td>-450</td>
<td>650</td>
</tr>
<tr>
<td>North West</td>
<td>Tameside</td>
<td>200</td>
<td>-100</td>
<td>300</td>
</tr>
<tr>
<td>North West</td>
<td>Trafford</td>
<td>350</td>
<td>50</td>
<td>300</td>
</tr>
<tr>
<td>North West</td>
<td>Warrington</td>
<td>250</td>
<td>50</td>
<td>200</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Newcastle-under-Lyme</td>
<td>700</td>
<td>-500</td>
<td>1,200</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Shropshire</td>
<td>250</td>
<td>250</td>
<td>0</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Staffordshire Moorlands</td>
<td>100</td>
<td>100</td>
<td>50</td>
</tr>
<tr>
<td>West Midlands</td>
<td>Stoke-on-Trent</td>
<td>1,000</td>
<td>250</td>
<td>750</td>
</tr>
<tr>
<td>Yorkshire and The Humber</td>
<td>Sheffield</td>
<td>100</td>
<td>-50</td>
<td>150</td>
</tr>
</tbody>
</table>

Sources: [1] Table WU01UK (Location of usual residence and place of work by sex), Origin Destination tables, 2011 Census, Office for National Statistics (ONS), NOMIS. ONS Crown Copyright 2018. [2] Table T107, UK travel flows (local authority) tables, 2001 Census, ONS, NOMIS. ONS Crown Copyright 2018. Notes: [1] The underlying 2011 commuting flows figures relate to all usual residents aged 16 and over in employment, but the underlying 2001 figures relate only to employed residents aged 16 to 74. [2] To protect against disclosure of personal information, ONS has swapped some records between different geographic areas. Some counts will be affected, particularly small counts for small areas. [3] Figures rounded to nearest 50. [4] This table covers all those neighbouring or nearby authorities for which either the gross inflow or the gross outflow changed by at least 100 (before rounding) between 2001 and 2011.
Out-of-work benefits and unemployment
Claimant count
3,430 of Cheshire East’s residents were claiming out-of-work benefits as at July 2018 (up from 3,400 in the previous month). This equates to 1.5% of the Borough’s working-age (16-64 year-old) population – a claimant rate which is somewhat lower than in July of 2013 (2.2%), but higher than in the same month of 2014 (1.4%), 2015 (1.1%), 2016 (also 1.1%) and 2017 (also 1.1%). However, the current Cheshire East rate is significantly lower than those for the North West and UK (2.8% and 2.2% respectively).

Of the Borough’s five parliamentary constituencies, Crewe & Nantwich (2.4%) has the highest rate, followed by Eddisbury (2.0%). In Congleton (1.2%), Macclesfield (1.3%) and Tatton (0.8%), the rates are below the Borough average.

At settlement level, Crewe (2.9%), Macclesfield (1.9%), Alsager (1.8%) and Sandbach (1.6%) are the only settlements with claimant rates above the Cheshire East average. Crewe, Macclesfield and Alsager are the only settlements that have any Lower Layer Super Output Areas (LSOAs) with claimant rates that exceed 4% (though all of these LSOAs’ rates are below 9%).

For the Borough’s 18-24 year-olds, the claimant rate is 2.5%. This is higher than for other age groups (0.1% for 16-17 year-olds, 1.6% for 25-49s and 1.3% for 50-64s) and is greater than the July 2017 rate (1.9%), but is below the current rates for the North West (3.7%) and the UK (2.9%).

As of July 2018, 35% of Cheshire East JSA (Jobseeker’s Allowance) claimants had been claiming JSA for a year or more, which compares favourably to the North West (36%) and the UK (38%).

---


32 Parts of Eddisbury (including Winsford, its largest settlement) and Tatton are in the Borough of Cheshire West & Chester.

33 LSOAs are sub-ward areas which the Office for National Statistics created for statistical purposes. They are intended to be of roughly equal size (in terms of population). Cheshire East contains 234 LSOAs.

34 Jobseeker’s Allowance Count, Office for National Statistics (ONS), NOMIS. Crown Copyright 2018.
Unemployment

The official measure of unemployment covers all those who are not employed, but who are available for and actively seeking work. In other words, it covers both jobseekers who are claiming out-of-work benefits, and those jobseekers who are not claiming such benefits. The latest estimate – averaged over the twelve-month period April 2017 to March 2018 – puts Cheshire East’s unemployment total at 6,000. This equates to 3.3% of the economically active (employed or unemployed) population aged 16 and above, which is slightly lower than the figure for the year ending March 2017 (3.5%) and a considerable reduction from the peak (6.6%) reached in the year to March 2010 (see Figure 17).

Figure 17: Unemployment rate

As with the claimant count measure, Cheshire East’s current unemployment rate is significantly below the regional and national averages (4.4% for the North West and 4.3% for Great Britain, for the year to March 2018). In the region and Great Britain, rates have also dropped significantly in recent years - in the year to March 2012, they peaked at 8.8% and 8.1% respectively – and are now at a level last achieved before 2004.

Qualifications

Working-age residents’ qualification levels compare well to the region and the UK, as indicated in Figure 18. Survey data for 2017 suggest that over two fifths (45.7%, or about 102,100) of Cheshire East’s 16-64 year-olds have a qualification at Level 4 (first degree level or equivalent) or above, a proportion that exceeds the figures for both the North West (34.5%) and the UK (38.4%) by statistically significant margins. At local, North West and UK level, this proportion has increased substantially since 2004 (by a statistically significant amount in each case), but the Cheshire East percentage has remained consistently above the UK (and North West) average over that time, as Figure 19 shows.

Figure 18: Highest qualification of 16-64 year-olds, 2017

In 2017, an estimated 81.3% (around 181,500) of Cheshire East’s 16-64 year-olds were qualified to Level 2 (equivalent to 5 GCSEs at grades A*-C) or above, which exceeded the UK average (74.5%) by a statistically significant margin. As with the Level 4 statistics, the Cheshire East Level 2 percentage has stayed consistently above the national and regional averages since 2004 (Figure 20). Once again, the 2004-17 change in all three of these geographical areas is statistically significant.

---

The same survey data also suggest (see Figure 18 again) that 4.6% (around 10,400) of 16-64 year-olds lacked any qualifications (a statistically significant difference from the 9.0% and 8.0% figures for the region and the UK respectively).

**Figure 19: 16-64 year-olds with a qualification at or above Level 4**

![Figure 19](image)

**Figure 20: 16-64 year-olds with a qualification at or above Level 2**

![Figure 20](image)
Self-employment

Of those Cheshire East residents aged 16 and above who have a job, an estimated 16.3% (28,700) are self-employed, according to the latest (2018) survey data. This self-employment rate is above both the North West average (13.5%) and the UK figure (15.2%), but is not significantly different (in a statistical sense) from either, so the difference may be a result of survey sampling error.

In both the region and the UK, the self-employment rate has increased fairly steadily since 2005 (from rates of 11.2% in the North West and 12.7% in the UK). The trend within Cheshire East is less cut – which partly reflects the lower degree of accuracy of the estimates at local authority level – but rates have generally been higher during the period from 2010 onwards (ranging from 13.8% to 18.5%) than during 2005 to 2009 (12.6% to 15.7%). It may be that, in Cheshire East, the 2008-9 recession prompted a relatively large proportion of employees who had lost their jobs to start up their own businesses, thus significantly raising the self employment rate – but it would be difficult at best to obtain evidence to confirm this.

Business demography

In 2016, there were 2,770 new business births in Cheshire East – the highest number of births in Cheshire East in recent years (2010 onwards) and more than in any other North West unitary or district authority, except for Manchester. The number of births in Cheshire East in 2016 was up 60% on the 2010 figure and 15% above its 2015 level.

The 2,770 figure equates to a birth rate (the number of births per 10,000 residents aged 16 and above) of 89 for Cheshire East. As in previous years (see Figure 21), this is considerably higher than the birth rates for the North West (72 in 2016) and the UK (78 in 2016).

By the end of 2016, the Borough’s total stock of businesses stood at 20,230 – which again is the highest figure in recent years and exceeds that of all North West unitary and district authorities, apart from Manchester. Cheshire East’s business stock remained virtually static (staying between 17,500 and 17,700) between 2010 and 2012, but is now 15% higher than in 2010 and 5% up on 2015 (although, as Figure 22 shows, the 2010-16 percentage growth in business stock is slightly lower than for the North West or the UK). The Borough’s business density (the stock of businesses per 10,000 residents aged 16 and above) is 651 for 2016; as for 2010-15 (see Figure 23), this is significantly better than in the UK (532 in 2016) or the North West (472).

---


Figure 21: Business birth rates

![Business birth rate graph]


Figure 22: Business stock

![Business stock index graph]

Business survival prospects are also good, as Figure 24 demonstrates. Of those which started up in 2015, 91.1% survived their first year. For the most recent cohorts of businesses for which data are available (those born between 2010 and 2015), the first year survival rate has remained between 90% and 93%. The latest rate (the 91.1% for the 2015 birth cohort) exceeds the UK rate (89.7%) for the first time in recent years. However, this is because the rate has declined more sharply in the UK (from a 2013 peak of 93.5%) than in Cheshire East (down from 92.6% in 2013).

77.4% of the Borough’s businesses currently survive for two years (based on the performance of those which started up in 2014). This is above the current UK rate (75.7%), although Cheshire East’s previous (2013) birth cohort fared marginally worse than the UK average (74.8% versus 75.0%). However, the latest available figures (those for businesses born between 2011 and 2013) show Cheshire East consistently outperforming the UK on longer term survival rates, with the Borough’s three, four and five year survival rates (for which the latest figures are 61.3%, 51.2% and 45.6% respectively) exceeding those for the UK (60.8%, 50.4% and 44.1%).

The overwhelming majority of Cheshire East enterprises are small. According to the latest (2017) UK Business Counts data published by the Office for National

---

For the purposes of these survival statistics, references to the “latest” figures mean those showing performance up to 2016: for example, the latest one-year survival rates are for businesses born in 2015, but the latest three-year survival rates are for those born in 2013.
Statistics\textsuperscript{40}, 78.9\% of enterprises\textsuperscript{41} have less than 5 employees and 11.1\% employ 5-9 staff; a further 8.2\% have a workforce of between 10 and 49. Only 1.4\% have 50-249 employees and only 0.3\% employ 250 or more. These proportions are virtually the same as those at UK level, as Figure 25 shows.\textsuperscript{42}

**Figure 24: Business survival rates**

![Business survival rates graph](image)


\textsuperscript{40} 'UK Business Counts – enterprises’ data for 2017, Office of National Statistics (ONS), NOMIS. ONS Crown Copyright 2018. Note: These figures include public sector bodies (as well as private sector enterprises), but the UK Business Counts statistics indicate that public sector organisations account for only 0.6\% of enterprises in Cheshire East and only 0.5\% of all UK enterprises.

\textsuperscript{41} According to the Office for National Statistics/ NOMIS technical information on the UK Business Counts data series, “An enterprise can be thought of as the overall business, made up of all the individual sites or workplaces. It is defined as the smallest combination of legal units (generally based on VAT and/ or PAYE records) that has a certain degree of autonomy within an enterprise group.”

\textsuperscript{42} For the UK, the respective figures for each of these employment bands are 78.2\%, 11.2\%, 8.7\%, 1.5\% and 0.4\%.

OFFICIAL
Turnover statistics (also from the UK Business Counts data series) present a similar picture: as of 2017, 41.1% of Cheshire East enterprises had an annual turnover of less than £100,000 and 30.7% were in the £100,000 to £199,000 range; for a further 19.2%, turnover was between £200,000 and £999,000. Only 7.7% had a turnover of £1m to £9.999m and just 1.2% had a turnover of £10m or more. Again, these proportions are almost identical to those at UK level (Figure 26).  

---

43 The turnover data provided for the majority of traders is based on VAT returns for a twelve month period. For "2017", this relates to a twelve month period covering the financial year 2015/2016. For traders who have registered more recently, turnover represents the estimate made by traders at the time of registration.

44 For the UK, the respective figures for each of these turnover bands are 41.1%, 31.0%, 19.0%, 7.8% and 1.2%.
Figure 26: Enterprises by turnover size band

![Chart showing Enterprises by turnover size band, 2017 for Cheshire East and UK.]

Source: ‘UK Business Counts – enterprises’ data for 2017, Office of National Statistics (ONS), NOMIS. ONS Crown Copyright 2018. Note: These figures include public sector bodies (as well as private sector enterprises), but the UK Business Counts statistics indicate that public sector organisations account for only 0.6% of enterprises in Cheshire East and only 0.5% of all UK enterprises.

Business Survey (2017)\textsuperscript{45}

At the end of 2016, the Cheshire Local Authorities, the Cheshire East Skills & Growth Company and the Cheshire & Warrington Local Enterprise Partnership (LEP) commissioned a new business survey. The survey was managed by Cheshire East Council and undertaken by BMG Research, and was only the second large-scale local survey of businesses in recent years (the first one having been undertaken in 2011).

The survey covered a sample of 1,502 businesses across Cheshire and included almost equal numbers of businesses from each of the two Cheshire Authorities (752 from Cheshire East and 750 from Cheshire West & Chester). The survey sample was selected to be representative of the local business population in terms of business sector (i.e. industry) and size. It covered only private sector organisations and excluded those with no employees. Interviews were conducted by phone and took place between January and March 2017. Key findings from the survey are reported below, but more detailed information can be found in the survey reports on the Cheshire East Council ‘Business’ web pages.\textsuperscript{46}

\textsuperscript{45} Cheshire Business Survey 2017 final reports, August 2017. Survey undertaken by BMG Research on behalf of the Cheshire Local Authorities, the Cheshire East Skills & Growth Company and the Cheshire & Warrington Local Enterprise Partnership.

\textsuperscript{46} These reports and a final presentation can be found at http://www.cheshireeast.gov.uk/business/business_information/cheshire-business-survey-2017.aspx.
Workforce and skills issues

- 26% of establishments said the size of their workforce had grown in the twelve months prior to the survey (i.e. the period between January-March 2016 and January-March 2017), but only 15% reported a contraction in their workforce. This represents an improvement on 2011, when they were more likely to report contraction (as 19% did then) than growth (16%).

- Just over a fifth (22%) of businesses employ some staff on temporary, fixed term contracts and 9% make use of zero hours contracts.

- Nearly half (46%) had had any vacancies in the previous twelve months. 22% of all the Cheshire East respondents (49% of those with vacancies in the last twelve months) reported some of their vacancies were hard to fill (whereas only 9% of all respondents said this in 2011). By sector, Wholesale & Transport businesses are most likely to report hard-to-fill vacancies.

- The most commonly-cited reasons for vacancies being hard to fill were: a low number of applicants with the required skills (mentioned by 81% of those with hard-to-fill vacancies), candidates lacking appropriate experience (49%), a lack of interest in that type of job (48%) and lack of required qualifications (32%).

- Two thirds (68%) said there are skills needs or gaps within their existing workforce (similar to the 2011 figure of 66%). When asked what specific skills gaps they had, the most frequently-cited skills are technical, specialist or job specific skills (35%), sales & marketing skills (32%) and IT skills (31%).

- Only 7% said they employ any migrant workers (defined in the questionnaire as “workers who have recently moved to the UK from another country”), but this proportion is much higher amongst larger businesses. Of those with migrant workers, 91% employ some EU migrants and 37% have some non-EU migrants (and some of these firms employ both). EU workers account for the vast majority (85%) of all the migrants employed by Cheshire East businesses.

- 25% of businesses said that the National Living Wage had had an impact on their wage bill. Larger firms and those in the Wholesale & Transport and Education, Health & Other Services sectors were much more likely to report such an impact.

Training and apprenticeships

- Half of businesses (47%) have a training plan at their site and 29% have a training budget. Both these figures are significantly higher than in 2011 (when they were 40% and 21% respectively). 16% have an internal training department, but this percentage increases with the size of the firm.

- 43% have a training and development strategy and 36% offer work placements to school pupils or other young people; again, these proportions are higher for larger firms (and, in the latter case, for Education, Health & Other Services firms).
56% had arranged or funded at least some training in the previous twelve months (once again, larger firms are more likely to make such arrangements than smaller ones). However, this is slightly lower than the 2011 figure (60%).

Of those that had arranged or funded such training, 86% had used external providers. They are most likely to have used private training organisations (58%) or specialist organisations (51%); 22% had employed FE colleges for this purpose.

23% have employed apprentices at some point in the last five years (more specifically, 11% had apprentices at the time of the survey; a further 12% did not, but had used apprentices in the previous five years). Not surprisingly, the larger the business, the greater its propensity to currently employ apprentices.

Customers and suppliers
84% purchase at least some supplies from firms in the Cheshire & Warrington area. 61% use Greater Manchester-based suppliers and 46% source inputs from the Potteries area, but (as might be expected) they are much less likely to buy goods and services from Merseyside (27% do) or North Wales (15%).

25% import some of their supplies; 20% import from EU countries and 11% make purchases from non-EU businesses (and some of these buy from both EU and non-EU countries). Production & Construction and Wholesale & Transport firms are more likely to import than those from other sectors.

73% sell some of their goods and services to customers based in Cheshire & Warrington; 32% make all their sales within this area. 32% sell to Greater Manchester customers and 25% to the Potteries; unsurprisingly, many fewer Cheshire East firms do business with clients in Merseyside (16% do) or North Wales (13%).

20% of all Cheshire East businesses are exporters (up from 13% in 2011); 17% export to EU countries and 13% sell to customers outside the EU (and some of these export to both). 7% of all Cheshire East firms export only to the EU and 3% export only outside the EU. 6% of all Cheshire East businesses’ sales are exported (4% to the EU and 2% to non-EU countries).

Business performance and future outlook
Over-regulation and red tape (cited by 51% of respondents in 2017), tax rates (48%, but down from 57% in 2011) and increasing labour costs (45%, which is up from 35% in 2011) are the most often mentioned barriers to the business’ growth over the next three years, followed by energy costs47 (41%). The vast majority (88%) identify at least one barrier to growth.

---

47 Includes transport fuel costs.
Larger companies were more likely (than smaller ones) to mention barriers relating to skills and labour, energy costs, market size, transport infrastructure, planning permission and availability of land/ premises.

When asked about plans for the next twelve months, relatively large proportions said they intended to increase their staffing levels (cited by 44%), their investment in equipment/ machinery (42%) or their investment in training (42%). 37% planned to expand the size of their geographic market and 26% intended to export more. 26% said they were going to engage in more research & development. Very few (less than 5%) reported a planned reduction in any one area of activity.

30% thought “Brexit” would have a negative impact on their business over the next three years and only 15% anticipated a positive impact. 39% thought there would be no impact and 16% didn’t know what the effect might be. When asked how Brexit would affect the Cheshire economy, the results were very similar (14% positive and 30% negative), but with more “don’t knows” (23%) and fewer (32%) expecting zero impact.

Business land and premises
- 16% of businesses think they are likely to relocate in the next five years. Smaller businesses are much more likely to anticipate relocating than larger ones are: for example, 17% of those with 1-10 employees expect to move, but only 6% of those with 50+ employees expect to do so.
- Of those likely to relocate, 50% cite a need for larger premises. Other common reasons – the need for a more suitable site; rising costs/ the need to find a cheaper site; poor infrastructure/ lack of parking facilities; and the end of lease/ a landlord forcing a move – are each cited by roughly a tenth of likely movers.

IT infrastructure
- 97% of all Cheshire East businesses have internet access (91% did in 2011) and 95% have broadband (88% in 2011). Only around half (54%) have superfast broadband, but this proportion is up dramatically on 2011 (18%). The proportion of firms with a website has also increased significantly, from 76% (2011) to 88% (2017).
- Satisfaction with broadband coverage has gone down substantially, from 66% in 2011 to 54% in 2017. However, this probably reflects in part the higher expectations and greater demands that today’s broadband users have.
- Dissatisfaction with broadband coverage is far more prevalent in rural areas (20% very dissatisfied, whereas only 7% of urban businesses are) and among businesses with no superfast broadband (21% very dissatisfied, whereas only 4% of other businesses are).
Business support and regulation

- 50% of businesses had sought independent advice in the previous twelve months (compared to 53% in 2011). This was most likely to be about IT issues other than social media (cited by 49% of those seeking advice), legislation (40%), workforce skills and training (39%), use of social media (38%), marketing (37%) and general business planning (36%).

- The four most common sources for such advice were accountants (83%), business associates/ friends/ family (47%), banks (44%) and solicitors (38%). Only 14% had approached Cheshire East Council (the joint fifth most common source) for advice; for the Cheshire East Skills & Growth Company (2%), the Cheshire & Warrington LEP (2%) and the Cheshire & Warrington Growth Hub (less than 0.5%), the figures were much smaller (though 24% had heard of the Growth Hub).

- 38% pay for advice to support inspections, standards, licences or permits. Firms in the Production & Construction sectors are much more likely to pay for such advice, as are larger employers. Businesses are most likely to require paid advice on the issues of health & safety (23% of all Cheshire East establishments do so) or licences and permits (17%).

Environmental improvement

- 72% of businesses have undertaken at least one action to improve their environmental performance (such as recycling, waste reduction, cutting their energy or water use or purchasing environmentally friendly products). This was similar to the 2011 figure (71%). The most commonly-cited forms of environmental improvement were the adoption of a recycling or waste minimisation scheme (46%), introducing/ purchasing environmentally friendly products (39%) and measures to reduce energy costs or increase energy security (34%).

- Only 15% have plans for further environmental improvements, which is down sharply on 2011 (27%).

Business location

- When asked about the benefits of Cheshire East as a business location, firms’ most frequent responses were the overall attractiveness of the area (cited by 66%), access to road links (60%) and access to markets/ neighbouring cities (55%). 93% could identify at least one benefit.

- 52% could name at least one disadvantage, most commonly traffic congestion (raised by 14% of Cheshire East businesses), followed by (inadequate) broadband coverage (7%), business rates (also 7%) and the cost of business land/ premises (also 7%).
Tourism and visitor attractions
Cheshire East has a number of tourism attractions that are of regional or national importance.

The Borough’s most-visited attraction is Tatton Park, which receives over 800,000 visitors, making it one of the largest attractions in the North West.\(^{48}\) The North West region’s top 20 most visited “paid” attractions include four other locations in Cheshire East: Quarry Bank Mill and Garden, which is near Wilmslow (252,000 visitors in 2017); Lyme Park & Gardens near Disley (193,000); the Jodrell Bank Discovery Centre near Holmes Chapel (148,000); and Little Moreton Hall & Gardens, which is between Alsager and Congleton (81,000). The Borough’s most-visited free attraction was Astbury Mere Country Park, in Congleton (253,000 visitors in 2017). Whilst the number of visits to some of these attractions has remained reasonably static over the long term, Quarry Bank Mill and Garden and Lyme Park & Gardens have seen substantial growth in recent years, as has the Jodrell Bank Discovery Centre (Figure 27).\(^{49}\)

Other major attractions for visitors include the Peak District National Park (part of which lies within Cheshire East), Tegg’s Nose Country Park and Cholmondeley Castle.

The Jodrell Bank Discovery Centre is part of the Jodrell Bank Observatory site and includes the world-famous Lovell Radio Telescope. The Observatory, along with two buildings in central Manchester, is one of the main sites occupied by the Jodrell Bank Centre for Astrophysics. The Centre, which forms a major part of the University of Manchester’s research activities, carries out world-renowned radio astronomy research and development, as well as research into the rest of the electromagnetic spectrum and theoretical scientific topics. It operates e-MERLIN, the UK network of radio telescopes which undertake radio astronomy observations to help improve scientists’ understanding of (among other things) other galaxies, star formation processes and black holes. The same site includes the headquarters for the Square Kilometre Array (SKA) Organisation, which is undertaking a project to build the world’s largest radio telescope.\(^{50}\)

---

\(^{48}\) Source: [http://www.tattonpark.org.uk/about_us/about_us.aspx](http://www.tattonpark.org.uk/about_us/about_us.aspx)

\(^{49}\) 2017 Annual Survey of Visits to Visitor Attractions, VisitEngland, August 2018. Notes: [1] The VisitEngland 2017 survey data exclude figures for Tatton Park. [2] Figures quoted above are rounded to the nearest 1,000, but the VisitEngland data in some cases reports visitors to a greater degree of precision than this.

Tourism revenue accounted for an estimated £921m of Cheshire East's economy in 2017. In that year, 16.0m tourists visited Cheshire East, and these people spent a total of 17.6m days in the Borough.

The overnight visitor market makes a major contribution to the Cheshire East economy. In 2017, only 10% of visitors stayed overnight (in serviced or non-serviced accommodation, or with friends/relatives), but this relatively small proportion of visitors accounted for 26% (£241m) of all tourism revenue (see Figure 28). Those who stayed in serviced accommodation (5% of all visitors) accounted for the vast majority of this (£200m, or 22% of all tourism revenue); the 4% who stayed with friends/relatives were responsible for 3% of revenue and those in non-serviced accommodation made up less than 0.5% of visitors, but contributed over 1% of revenue.

Day visitors (90% of all visitors) accounted for the other 74% (£680m) of the visitor economy.
It is estimated that, in 2017, Cheshire East's visitor economy supported 11,600 jobs (around 9,100 of them directly and a further 2,400 indirectly).  

**Figure 28: Visitor numbers and spending**

![Diagram showing contribution of visitors to the Cheshire East economy, 2017](image)

Source: Cheshire East STEAM Trend Report for 2009-17 Global Tourism Solutions (UK) Ltd, 2018. Note: Revenue includes indirect (knock-on) effects on the local economy, as well as the visitors' own spending.

---

**Housing market**

**House prices**

According to the Land Registry's latest monthly data, average (mean) house prices in Cheshire East rose by 3% in the year to June 2018 – the same rate as in the North West as a whole and England. As Figure 29 shows, the Borough's annual house price inflation peaked at 34% in the early 2000s (it peaked at 26% in England and 33% in the North West around the same time), but prices dropped by over 14% in the year to February 2009 (and by a similar proportion in England and the North West in that same year). 2011 and 2012 saw further (more modest) contractions in Cheshire East's house prices. However, aside from a couple of months in mid-2017,

---

51 The figures for tourism revenue, overall visitor numbers/visitor days and jobs supported by tourism are from the Cheshire East STEAM Final Trend Report for 2009-17, Global Tourism Solutions (UK) Ltd, 2018. Monetary figures are in 2017 prices.

annual house price inflation has remained in the 1% to 10% range since 2014 (not much different to England’s 3% to 10% range for the same time period and the North West’s 2% to 7% range).

**Figure 29: House price inflation**

![House price inflation graph](image)

From 2003 to 2014, Cheshire East’s mean house price was close to (within 5% of) the England average, though well above the North West (see Figure 30). However, the average (mean) house price in Cheshire East (£217,000 in June 2018) is currently 12% below the England average (£245,000). This contrasts with June 1995 (the earliest year for which this data series is available), when the average Cheshire East property price was 8% above the England figure. This divergence is due to Cheshire East’s house price inflation rate generally matching or falling short of the England rate over the last two decades, but rarely exceeding it (see Figure 29 again).
Figure 30: Mean house prices

Land Registry Price Paid Data, which can be broken down to settlement level (as shown in Table 6) put the Borough’s median house price at £206,000 (based on property transactions in the year to 30th November 2017), although the cheapest 25% sell for under £138,000 and the most expensive 25% for over £317,000. The cheapest 10% sell for under £100,000, whilst the highest-valued 10% are sold for over £495,000.

The same data show that, among the Borough’s towns, Crewe has (by some distance) the lowest median price (£130,000), followed by Middlewich (£163,000) and Macclesfield (£170,000); median prices in Congleton (£185,000), Nantwich (£193,000), Alsager (£195,000) and Sandbach (£200,000) are closer to the overall Cheshire East median, but still below it. In contrast, median prices are far above the overall Cheshire East figure in Wilmslow (£355,000), Knutsford (£321,000) and Poynton (£290,000). For smaller settlements, median prices range from under £185,000 in Haslington and Shavington to £400,000 or more in Goostrey, Alderley Edge, Bunbury and Prestbury. The median house price in Prestbury (£708,000) is far higher (over £250,000 higher) than in any of the other 24 main settlements. Outside the 24 main settlements, in the Other Settlements and Rural Areas (OSRA), where the population tends to be more sparsely distributed, the median price is well above the overall Cheshire East figure, at £280,000.
In the Borough’s rural areas, median house prices (£268,000) are much greater than in its urban areas (£172,000).\(^{53}\)

### Table 6: House prices in Cheshire East, by settlement, 1/12/16 to 30/11/17

<table>
<thead>
<tr>
<th>Settlement</th>
<th>Bottom decile</th>
<th>Lower quartile</th>
<th>Median</th>
<th>Upper quartile</th>
<th>Top decile</th>
<th>Number of transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alderley Edge</td>
<td>135</td>
<td>269</td>
<td>410</td>
<td>734</td>
<td>1,050</td>
<td>123</td>
</tr>
<tr>
<td>Alsager</td>
<td>120</td>
<td>153</td>
<td>195</td>
<td>277</td>
<td>356</td>
<td>223</td>
</tr>
<tr>
<td>Audlem</td>
<td>156</td>
<td>205</td>
<td>292</td>
<td>399</td>
<td>506</td>
<td>68</td>
</tr>
<tr>
<td>Bollington</td>
<td>145</td>
<td>173</td>
<td>223</td>
<td>322</td>
<td>420</td>
<td>142</td>
</tr>
<tr>
<td>Bunbury</td>
<td>256</td>
<td>339</td>
<td>448</td>
<td>494</td>
<td>625</td>
<td>30</td>
</tr>
<tr>
<td>Chelford</td>
<td>210</td>
<td>244</td>
<td>383</td>
<td>427</td>
<td>474</td>
<td>18</td>
</tr>
<tr>
<td>Congleton</td>
<td>103</td>
<td>129</td>
<td>185</td>
<td>255</td>
<td>317</td>
<td>541</td>
</tr>
<tr>
<td>Crewe</td>
<td>77</td>
<td>99</td>
<td>130</td>
<td>173</td>
<td>243</td>
<td>1,264</td>
</tr>
<tr>
<td>Disley</td>
<td>121</td>
<td>146</td>
<td>218</td>
<td>384</td>
<td>602</td>
<td>80</td>
</tr>
<tr>
<td>Goostrey</td>
<td>194</td>
<td>316</td>
<td>400</td>
<td>575</td>
<td>745</td>
<td>73</td>
</tr>
<tr>
<td>Handforth</td>
<td>115</td>
<td>153</td>
<td>202</td>
<td>285</td>
<td>360</td>
<td>126</td>
</tr>
<tr>
<td>Haslington</td>
<td>125</td>
<td>155</td>
<td>178</td>
<td>244</td>
<td>283</td>
<td>76</td>
</tr>
<tr>
<td>Holmes Chapel</td>
<td>96</td>
<td>160</td>
<td>240</td>
<td>314</td>
<td>376</td>
<td>139</td>
</tr>
<tr>
<td>Knutsford</td>
<td>154</td>
<td>232</td>
<td>321</td>
<td>480</td>
<td>625</td>
<td>239</td>
</tr>
<tr>
<td>Macclesfield</td>
<td>93</td>
<td>125</td>
<td>170</td>
<td>250</td>
<td>395</td>
<td>1,003</td>
</tr>
<tr>
<td>Middlewich</td>
<td>99</td>
<td>128</td>
<td>163</td>
<td>220</td>
<td>270</td>
<td>313</td>
</tr>
<tr>
<td>Mobberley</td>
<td>156</td>
<td>250</td>
<td>310</td>
<td>500</td>
<td>712</td>
<td>53</td>
</tr>
<tr>
<td>Nantwich</td>
<td>108</td>
<td>145</td>
<td>193</td>
<td>275</td>
<td>375</td>
<td>384</td>
</tr>
<tr>
<td>Poynton</td>
<td>182</td>
<td>240</td>
<td>290</td>
<td>398</td>
<td>500</td>
<td>220</td>
</tr>
<tr>
<td>Prestbury</td>
<td>310</td>
<td>445</td>
<td>708</td>
<td>1,115</td>
<td>1,927</td>
<td>87</td>
</tr>
<tr>
<td>Sandbach</td>
<td>121</td>
<td>153</td>
<td>200</td>
<td>271</td>
<td>368</td>
<td>554</td>
</tr>
<tr>
<td>Shavington</td>
<td>80</td>
<td>139</td>
<td>183</td>
<td>230</td>
<td>255</td>
<td>146</td>
</tr>
<tr>
<td>Wilmslow</td>
<td>150</td>
<td>239</td>
<td>355</td>
<td>560</td>
<td>742</td>
<td>529</td>
</tr>
<tr>
<td>Wrenbury</td>
<td>175</td>
<td>203</td>
<td>376</td>
<td>563</td>
<td>710</td>
<td>30</td>
</tr>
<tr>
<td>Other Settlements and Rural Areas (OSRA)</td>
<td>150</td>
<td>195</td>
<td>280</td>
<td>450</td>
<td>703</td>
<td>976</td>
</tr>
<tr>
<td><strong>Cheshire East</strong></td>
<td><strong>100</strong></td>
<td><strong>138</strong></td>
<td><strong>206</strong></td>
<td><strong>317</strong></td>
<td><strong>495</strong></td>
<td><strong>7,437</strong></td>
</tr>
</tbody>
</table>

Source: Land Registry Price Paid Data published by the Registry under the terms of the Open Government Licence. Data downloaded (during the week commencing 22/1/18) from the Land Registry website’s Price Paid Data yearly files for 2016 and 2017.

Notes: [1] The Land Registry data relates to the prices paid for residential property sales. It covers sales completed between 1\(^{st}\) December 2016 and 30\(^{th}\) November 2017. It should be noted that, even for this period, the statistics for some of the smaller settlements are based on a relatively small number of transactions.

---

number of completions (fewer than 50 in three settlements: only 30 in Bunbury and Wrenbury and only 18 in Chelford) and hence the figures for smaller settlements should therefore be treated with particular caution. [2] These figures relate to the number of transactions, not to the number of properties sold. For example, a property that exchanged hands twice during the year to 30th November 2017 would appear twice in the data, not once. [3] On its Price Paid Data guidance web page, the Land Registry states that the Price Paid data “is property price information for all single residential property sales in England and Wales sold for full market value, that are lodged with us for registration”. However, the downloaded data included some transactions which involved business premises (e.g. hotels, pubs, supermarkets), communal establishments (e.g. care homes), public facilities or services buildings (e.g. community centres, medical centres, public conveniences) or garages, or which (judging from the property address details) appeared to do so. Therefore online searches were made by Cheshire East Council to check the usage of all properties that either: (a) sold for at least £2.5m; or (b) sold for no more than £50,000 or no less than £1m and whose name or address implied they might not be home to a single household. The analysis shown above excludes all transactions (49 in total) identified through these searches as business premises (apart from farms), communal establishments, public facilities or services buildings, or garages. However, to limit the time involved in checking long lists of records, it has been assumed that all properties selling for more than £50,000 but less than £1m are single residences.
Housing affordability

Housing affordability is commonly measured by calculating the ratio of house prices to earnings. Office for National Statistics data indicate that, as of 2017, the median house price in Cheshire East was 7.57 times the median gross annual earnings of full-time employees who work in the Borough (up from 7.05 in 2008). This measure gives us an idea as to how affordable housing is for those who work in – or who may be planning to move to and work in - the Cheshire East area. Being based on median values, it is also a useful guide to housing affordability for the “average” person or “average” household. Between 2008 and 2014, this Cheshire East ratio consistently matched or exceeded the England average (pre-2008 data are not available for the Borough). The data for 2015 onwards suggest that Cheshire East has now fallen below the England ratio (which increased from 6.95 in 2008 to 7.91 by 2017), as shown in Figure 31. However, Cheshire East remains significantly higher than the North West average (5.79 in 2017).

Figure 31: Ratio of median house prices to the median earnings of full-time employees (workplace-based measure)

The ratio of the lower quartile house price to lower quartile gross annual full-time employee earnings (again based on employees working in the geographical area in question) is an indicator of housing affordability for the less well-off. In Cheshire East, this ratio was fractionally higher in 2017 (7.14) than in 2008 (7.06), but, again, it has gone from being slightly above the England average (6.91 in 2008 and 7.26 in 2017) to slightly below (Figure 32). However, once again, the Cheshire East ratio is still much higher than that for the North West (5.53 in 2017).

Except where specified otherwise, the data sources are the ‘Ratio of house price to workplace-based earnings (lower quartile and median), 1997 to 2017’ and ‘Ratio of house price to residence-based earnings (lower quartile and median), 2002 to 2017’ data tables, Office for National Statistics, April 2018.
Overall, therefore, housing affordability for the “average” person working in Cheshire East has worsened over the 2008-17 period, but has done so at a slower rate than in England as a whole. Affordability for the less well-off worker showed less movement, but again worsened both locally (by a fraction) and nationally (by a slightly greater margin).

**Figure 32: Ratio of lower quartile house prices to the lower quartile earnings of full-time employees (workplace-based measure)**

The Office for National Statistics also publishes housing affordability ratios that are residence-based: that is, based on the gross annual full-time earnings of employees who live (but do not necessarily work) in the geographical area in question. These figures give us an indication of how affordable housing is for those who live locally. They show the ratio of median house price to median earnings (7.42 in Cheshire East in 2017) being consistently below the England average (currently 7.91) since 2008 (Figure 33), but well above the North West figure (currently 5.81). Similarly, the residence-based ratio of lower quartile prices to lower quartile earnings in Cheshire East (7.01 in 2017) has stayed below the England average (7.26 in 2017) for seven consecutive years, but once again exceeds the North West ratio (5.56 in 2017) by a considerable margin (Figure 34).
At settlement level, 2017 data on household income, together with Land Registry data on house prices, can be used to estimate the ratio of median house prices to median household income, which is another measure of housing affordability. The resulting affordability ratios put the Borough-wide ratio at 5.8 and suggest that, focusing only on towns, housing is least affordable (with ratios above 6) in Knutsford (which has the highest ratio of any town, at 7.3), Poynton (6.2) and Wilmslow (6.6). By contrast, housing is most affordable (with ratios below 5.5) in the towns of Alsager, Congleton, Crewe, Macclesfield and Middlewich (which has the lowest ratio of any settlement, at 4.6). Among smaller settlements, the ratio varies widely, from under 5.5 in Bollington, Disley, Haslington and Holmes Chapel to more than 9 in Bunbury, Prestbury (which has the highest ratio of all settlements, at 10.9) and Wrenbury. In the more sparsely populated areas (outside the Borough’s 24 main settlements), housing is slightly more unaffordable than the Borough average, with a ratio of 6.1. The map in Figure 35 shows these geographical variations in

---

55 Sources: [1] PayCheck data, © Copyright 1996-2017 CACI Limited. This Report shall be used solely for academic, personal and/or non-commercial purposes. The figures for settlements are pseudo medians, rather than true medians. See the “Income” section of this Profile for further information about how the pseudo medians were calculated. [2] Land Registry Price Paid Data published by the Registry under the terms of the Open Government Licence. Data downloaded (during the week commencing 22/1/18) from the Land Registry website’s Price Paid Data yearly files for 2016 and 2017. See Notes [1] to [3] below Table 6 for further information and caveats about these data.
affordability and it can be seen that the areas where housing is least affordable are mainly settlements in the northwest of the Borough or at its southwestern edge, while housing is most affordable in Crewe, Middlewich and some of the easternmost settlements that are close to the Potteries or north Derbyshire.

**Figure 34: Ratio of lower quartile house prices to the lower quartile earnings of full-time employees (residence-based measure)**

![Graph showing the ratio of lower quartile house prices to lower quartile earnings](image)

Source: ‘Ratio of house price to residence-based earnings (lower quartile and median), 2002 to 2017’ data tables, ONS, April 2018.
Figure 35: Housing affordability ratios by settlement, 2016/17
Deprivation

Eighteen of Cheshire East’s 234 Lower Layer Super Output Areas (LSOAs) are among the 20% most deprived in England, according to the most recent (2015) Index of Multiple Deprivation (IMD), which is up from sixteen in the previous (2010) IMD. Most (thirteen) of these eighteen areas are in Crewe, though there are others in Macclesfield (two) and in Alsager, Congleton and Wilmslow (one each), as can be seen from Figure 36. Six LSOAs, all of them in Crewe, rank among England’s top (most deprived) 10%. One of these is in the top (most deprived) 5% nationally, though it is outside England’s top 4%.57

Several of the Borough’s other towns and larger settlements – Handforth, Knutsford, Middlewich, Nantwich and Sandbach – each have a single LSOA that is outside England’s most deprived 20% of LSOAs, but inside its most deprived 30%. Several Crewe LSOAs and one in Macclesfield also fall within this range. Poynton is the only Cheshire East town whose LSOAs all lie outside England’s most deprived 30%.

The IMD in turn consists of several deprivation domains, as shown in Table 7.58 Although, on the whole, deprivation is much less severe in Cheshire East than in most of England, some specific types of deprivation are more concentrated in Cheshire East than in England as a whole, as Table 7 demonstrates. In particular:

- 13 (5.6%) of Cheshire East’s LSOAs rank among England’s most deprived 5% for Living Environment deprivation, including 4 (1.7%) that are among the top 1% nationally;

- in the Geographical Barriers sub-domain, 74 (31.6%) of Cheshire East’s LSOAs are among England’s most deprived 20%, including 24 (10.3%) that are among the top 5% nationally.

As Table 7 also shows, there are some other deprivation indices, domains or sub-domains in which Cheshire East features in the national 1% - namely the index for Income Deprivation Affecting Children, the IMD Crime domain and the Living Environment “Indoors” sub-domain – whilst Employment is the only IMD domain that has no Cheshire East LSOAs in its top 5%.

56 LSOAs are sub-ward areas which the Office for National Statistics created for statistical purposes. They are intended to be of roughly equal size (in terms of population).
57 English Indices of Deprivation 2015, Department for Communities and Local Government (DCLG) (now the Ministry of Housing, Communities and Local Government), September 2015.
58 Some of these IMD domains and sub-domains require further explanation to be clearly understood. The Education, Skills & Training domain, which measures the lack of attainment and skills in the local population, is split into two sub-domains, one relating to the attainment and educational performance of children and young people and the other to adult skills. The Barriers to Housing & Services domain estimates the accessibility of services (such as schools, general stores/ supermarkets and housing), both physically and financially: its Geographical Barriers sub-domain measures the proximity of services and the Wider Barriers sub-domain covers issues such as housing and affordability. The Living Environment domain covers the quality of the local environment, with its Indoors sub-domain focusing on the quality/ condition of local housing and the Outdoors sub-domain on the quality of the external environment (using data on air quality and road traffic accidents). (Source: The English Indices of Deprivation 2015 – Technical report, DCLG, September 2015.)
Figure 36: Index of Multiple Deprivation, Cheshire East, 2015

Source: English Indices of Deprivation 2015, Department for Communities and Local Government (now the Ministry of Housing, Communities and Local Government), Sept 2015.
### Table 7: Number of deprived Lower layer Super Output Areas in Cheshire East, by Index/ Domain, 2015

<table>
<thead>
<tr>
<th>Indices</th>
<th>Within England's top (most deprived)...</th>
<th>...1%</th>
<th>...5%</th>
<th>...10%</th>
<th>...20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index of Multiple Deprivation (IMD)</td>
<td>0</td>
<td>1</td>
<td>6</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Income Deprivation Affecting Children Index (IDACI)</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Income Deprivation Affecting Older People Index (IDAPOI)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

| IMD domains | | | | | |
|-------------| | | | | |
| Income | 0 | 1 | 4 | 16 |
| Employment | 0 | 0 | 3 | 18 |
| Education, Skills & Training | 0 | 3 | 9 | 26 |
| Health Deprivation & Disability | 0 | 2 | 9 | 22 |
| Crime | 1 | 5 | 12 | 21 |
| Barriers to Housing & Services | 0 | 6 | 15 | 31 |
| Living Environment | 4 | 13 | 20 | 37 |

| Education, Skills & Training sub-domains | | | | | |
|------------------------------------------| | | | | |
| Children and Young People | 0 | 5 | 15 | 35 |
| Adult Skills | 0 | 1 | 4 | 19 |

| Barriers to Housing & Services sub-domains | | | | | |
|--------------------------------------------| | | | | |
| Geographical Barriers | 2 | 24 | 42 | 74 |
| Wider Barriers | 0 | 0 | 0 | 0 |

| Living Environment sub-domains | | | | | |
|---------------------------------| | | | | |
| Indoors | 1 | 15 | 23 | 46 |
| Outdoors | 0 | 1 | 6 | 17 |

Source: English Indices of Deprivation 2015, Department for Communities and Local Government (DCLG) (now the Ministry of Housing, Communities and Local Government), September 2015. Yellow = proportion of LSOAs in this category is greater than (i.e. worse than) England average.

At settlement level, most of the Borough’s settlements have at least one LSOA that falls within the top (most deprived) 20% of at least one of the IMD domains. However, only a few have two or more LSOAs in the top 20% of any one domain. These are:

- Audlem (both of whose LSOAs are in the top 20% of the Living Environment domain);
- Congleton (2 LSOAs in the top 20% of the Education, Skills & Training domain and 3 under the Crime domain);
- Crewe (10 in the Income domain, 9 under Employment, 16 under Education, Skills & Training, 10 in Health Deprivation & Disability, 15 under Crime and 17 in the Living Environment domain);
• Macclesfield (2 under the Income domain, 3 within Employment, 4 within Education, Skills & Training, 5 under Health Deprivation & Disability and 6 under Living Environment);

• Nantwich (2 within the Living Environment domain);

• Wilmslow (3 within the Barriers to Housing & Services domain);

• the Other Settlements and Rural Areas (OSRA) – the parts of the Borough that lie outside the main 24 settlements - which have 20 LSOAs in the Barriers to Housing & Services domain and 8 under Living Environment. However, in general, public services and local amenities tend to be less prevalent in and more distant from smaller settlements, so it is not surprising that many of these more rural areas appear in the upper (more deprived) reaches of the Barriers to Housing & Services domain.

Crewe also has multiple LSOAs within the top 20% of the indices for Income Deprivation Affecting Children (9) and Income Deprivation Affecting Older People (5). Macclesfield also has multiple (2) LSOAs in the top 20% of the latter index.

Transport
Cheshire East benefits from having strong road and rail links. The M6 runs along the western side of the Borough, connecting the area to Staffordshire, Birmingham and the rest of the West Midlands conurbation, Lancashire and Cumbria, whilst the M56 provides access to Greater Manchester, Merseyside and North Wales. Most of Cheshire East’s towns are relatively close to one of these motorways.

Cheshire East’s most strategically important rail station, Crewe, is at the junction of six main rail lines. Crewe provides access to the West Coast Main Line (London - Scotland) and TransPennine services (Liverpool-Manchester-Leeds-Hull-Newcastle). There is a direct service to London from Crewe, and also from Macclesfield, Wilmslow and Alsager.

In terms of footfall, Crewe is the busiest of the Borough’s train stations, with an estimated 3,086,000 entries and exits in 2016/17 – up 76% on 2006/07 and up 31% on 2011/12. The next three largest stations are Macclesfield (1,661,000 entries and exits in 2016/17, up 53% on 2006/07), Wilmslow (1,531,000, up 207%) and Knutsford (513,000, up 106%). As Figure 37 shows, activity at Wilmslow lagged far behind Macclesfield in 2006/07, but the two towns now host similar levels of rail passengers. The towns of Nantwich (up 273% between 2006/07 and 2016/17), Alsager (245%) and Sandbach (231%) saw even faster growth during this ten-year period, as did the smaller settlements of Alderley Edge (213%) and Disley (207%); the growth at Alsager might be explained in part by the station’s direct connection to London. However, all the Borough’s 22 stations saw entries and exits rise very

60 www.nationalrail.co.uk, July 2018.
substantially (by more than a quarter) over the 2006/07 to 2016/17 period. In the last year of this period, 2015/16 to 2016/17, entries and exits at Sandbach (up 22%) rose by more than at any of Cheshire East’s other stations.\(^61\)

**Figure 37: Entries and exits from Cheshire East’s busiest train stations**

Of Cheshire East’s other towns, Congleton and Poynton also have a train station, but Middlewich does not.

**Climate change\(^62\)**

In 2018, DBEIS (the Department for Business, Energy & Industrial Strategy) published its latest estimates of sub-national CO\(_2\) emissions. These suggest that, in 2016, total domestic emissions in Cheshire East were 702,000 tonnes, down 32.2% on 2005. Over the same eleven-year period, similar falls occurred across the North West (down 35.7%) and the UK (33.1%).

---

\(^{61}\) Estimates of Station Usage Time Series - 1997-98 to 2016-17, Office of Rail and Road (ORR), December 2017. Notes: [1] As Britain does not have a fully gated rail network, a complete recording of passenger flows through stations is not possible. Therefore these figures are estimates (based on ticket sales). [2] A number of improvements to the methodology have been implemented over recent years. These changes should be taken into account when considering changes in usage between years, as it may be a result of improved methodology, rather than reflecting an actual change in demand at the station.

Cheshire East's domestic emissions per capita have also fallen during this time (from 2.9 tonnes in 2005, to 1.9 by 2016). However, they remain higher than in the region (1.6 tonnes in 2016) or the UK (also 1.6).

Emissions from Industry & Commercial activity fell by 42.8% during 2005-16, to reach 790,000 tonnes. There was also a decrease (of 6.6%) in emissions from transport (now 1.196m tonnes). Emissions relating to land use, land use change and forestry (LULUCF), the other component of non-domestic emissions – were negative (minus 12,000 tonnes), as in other recent years: in other words, they (slightly) offset the emissions from other sources.

Total emissions (including the domestic sector) declined by 27.8%, to 2.675m tonnes, between 2005 and 2016. In the North West and the UK, similar percentage reductions also occurred (of 32.5% and 31.6% respectively).

By 2016, Cheshire East’s total emissions per capita were 7.1 tonnes, down significantly from the 2005 figure (10.3), as Figure 38 demonstrates. There were similar falls in the North West (from 8.7 to 5.6) and – as shown in Figure 39 – in the UK (from 8.7 to 5.4).

After rising by 0.6% between 2014 and 2015, the Borough’s total emissions fell 3.3% during 2015-16. However, transport emissions (up 0.4% between 2015 and 2016) have now increased for three consecutive years. As can be seen from Figure 40, both Cheshire East’s and the UK’s transport-related emissions are now at their highest level since 2007-8.

**Figure 38: CO₂ emissions per capita, Cheshire East**

Figure 39: CO₂ emissions per capita, UK

CO₂ emissions per capita, UK


Figure 40: Total CO₂ emissions (indexed)

Total CO₂ emissions for Cheshire East (CE) and UK by end user (indexed)

Source: UK local authority and regional carbon dioxide emissions national statistics: 2005 to 2016, Department for Business, Energy & Industrial Strategy, June 2018. Note: Total emissions also includes CO₂ emissions from land use, land use change and forestry.
Economic projections

Over the 2015-30 period, Cheshire East’s Gross Value Added (GVA) is expected to grow by an average of 1.6% a year in real terms (i.e. with the effects of inflation stripped out). This rate is slightly higher than those predicted for the North West and the UK (1.4% and 1.5% respectively), as Figure 41 indicates.

Cheshire East’s GVA growth is projected to be a little greater during 2020-30 (an average of 1.6% a year) than during 2015-20 (1.5%); the same is also true for the North West and UK.

Figure 41: GVA projections

The CWEM projections suggest that Cheshire East's employment will increase by an average of 0.6% a year between 2015 and 2030, exceeding the predicted performance of the North West (0.3%) and the UK (0.5%), as Figure 42 shows. For Cheshire East, there is no difference between the expected growth rate for 2015-20 and that anticipated for 2020-30 (both 0.6%). This is in contrast to the UK, where employment growth is predicted to slow down in the 2020s (averaging 0.7% per year.

---

63 Source: Baseline projections from the Cheshire & Warrington Econometric Model (CWEM). Projections were obtained using Cambridge Econometrics (CE)/IER LEFM software and are consistent with CE’s UK Regional Forecast of August 2017. Additional data preparation and aggregation by Cheshire East Council. Note: The level of housing provision set out in the Cheshire East Local Plan is based (in part) on jobs projections from a previous (2014) update of the CWEM model; the subsequent (2016 and 2017) CWEM updates were not available at the time of the Local Plan modelling work. However, the economic projections from the 2016 and 2017 CWEM updates take account of the level of housing development and population growth that the Local Plan provides for.

64 The figures quoted in this section are given to the nearest 0.1%, but the bars in the accompanying charts are derived from unrounded data.
during 2015-20, but only 0.4% for 2020-30). According to the CWEM, the North West
will also see slower growth over the 2020-30 period (0.3% per year) than between
2015 and 2020 (0.4%).

**Figure 42: Employment projections**

![Employment projections, 2015-30](image)

*Source: Baseline projections from the Cheshire & Warrington Econometric Model (CWEM). Projections were obtained using Cambridge Econometrics (CE)/IER LEFM software and are consistent with CE’s UK Regional Forecast of August 2017. Additional data preparation and aggregation by Cheshire East Council.*

*Profile produced by the Cheshire East Council Spatial Planning Team and last updated in August 2018.*
Annex 1: Map of Cheshire East settlements


Note: The geographical definitions used for each settlement are those set out in Appendix 6 of the Cheshire East ‘LDP Background Report: Determining the Settlement Hierarchy’, Cheshire East Council, November 2010.