



Hereford & Worcester
Fire Authority

Community Risk Management Plan 2021 - 2025

Supporting Documents

CRMP 2021-25 Risk Review

Economy

CRMP 2021-25 Risk Review – Economy

Business and Employment¹

At June 2019, the two counties were home to 42,100 local businesses, 30,555 (73 per cent) of which were in Worcestershire. Together they employed 312,800 people aged 16-64 years, of whom 114,000 (36 per cent) were in part-time employment. In addition, 72,200 people (15 per cent) were self-employed, a higher rate than both the West Midlands (9.4 per cent) and Great Britain (10.7 per cent). Unemployment stood at 11,700, an overall rate of 2.9 per cent, lower than both the West Midlands and Great Britain.

The majority of enterprises (36,045 or 86 per cent) were micro-businesses, employing up to nine people. With both counties being largely rural, many businesses were in the Agriculture, Forestry & Fishing sector, representing 11 per cent of all businesses (and almost one in four of all businesses in Herefordshire – 23.7 per cent). Together with enterprises in the Construction and Professional, Scientific & Technical sectors, the three sectors represented 38 per cent of all businesses in the two counties.²

In terms of employment, most people were employed in the health, manufacturing and retail sectors, which between them made up 146,000 (45 per cent) of the total available jobs in the two counties (excluding self-employed). In addition to large employers such as health services, education and other public sector services, there were 135 private sector businesses each employing over 250 employees.

Some of the more well-known companies include Bulmers (Heineken), Cargill and Tyrrells Crisps in Herefordshire along with Worcester Bosch, Mettis Aerospace (Redditch) and Primafruit (Evesham) in Worcestershire.

Table 1 provides a summary of business numbers and employees at June 2019.

Table 1 - Business and Employment - June 2019

	Herefordshire	Worcestershire	H&W	%
Businesses	11,555	30,555	42,110	
<i>0-9 employees</i>	<i>9,950</i>	<i>26,095</i>	<i>36,045</i>	<i>86</i>
Employees (16-64)	73,100	239,700	312,800	64
<i>Self-employed</i>	<i>22,300</i>	<i>49,900</i>	<i>72,200</i>	<i>15</i>
<i>Part-time</i>	<i>27,000</i>	<i>87,000</i>	<i>114,000</i>	<i>36</i>
Unemployed	2,400	9,300	11,700	2.9

¹ Labour market statistics from the Office for National Statistics: nomis profiles for [Herefordshire](#) and [Worcestershire](#) 2019. Figures are estimates as data varies between 2018 and 2019 depending on source.

² Statistics derived from the Office for National Statistics: nomis [UK Business Counts](#), 2019

In 2018, over 80 per cent of the resident 466,900 16-64 year olds in the two counties were economically active. While this was higher than both the West Midlands and Great Britain as a whole, income from earnings was relatively low compared to the Great Britain average. Herefordshire, in particular, had earnings 14 per cent lower than the West Midlands region and 20 per cent lower than in England³. 34,900 of the 16-64 year olds (8.7 per cent) in the two counties had no formal qualifications.

Around 83,400 people aged 16-64 were recorded as economically inactive in December 2019. Of these, 20,300 (24 per cent) were described as 'long-term sick' and 18,000 (22 per cent) were 'looking after family/home.' A further 15,100 (18 per cent) were retired. Also, at December 2018, there were 28,700 households described as 'workless', in which every member of the household is either unemployed or inactive.

Employment deprivation is one of the categories (known as domains) that make up the English Indices of Deprivation⁴. Employment deprivation measures the proportion of the working age population who are involuntarily excluded from the labour market. This includes those who would like to work but are unable to so, due to unemployment, sickness or disability, or caring responsibilities. At 2019, both counties had several LSOAs⁵ (or local neighbourhoods) among the 10 per cent most deprived in England for employment and income, including neighbourhoods in the south of Hereford city and parts of Bromyard, Leominster and Ross-on-Wye along with small neighbourhoods in Worcester, Redditch, Kidderminster, Malvern and Evesham. In addition, in 2019, nineteen LSOAs were among the 10 per cent most deprived areas in England.⁶

There is little statistical data available about the impact of changes in migrant working across the two counties, but news reports provide some evidence. Migrant workers have long been a mainstay of the horticultural labour force in both counties, but anecdotal evidence suggests that farmers across the UK in 2019 are reporting at least a 30 per cent shortfall in fruit and vegetable pickers and packers. The evidence suggests that many eastern European workers are increasingly able to find jobs closer to home, but the UK has also been affected by the closure of the seasonal workers visa scheme in 2013 along with Brexit uncertainties, the fall in the value of the pound and headlines about poor treatment of immigrants.⁷

³ From [Understanding Herefordshire – Economy & Place](#)

⁴ See [English Indices of Deprivation 2019](#) for more information on the indices and domains.

⁵ Lower-layer Super Output Areas (LSOAs) are small areas of about 1,500 people, used by the Office for National Statistics as a standard way of dividing up the county

⁶ The Office for National Statistics published the 2019 English Indices of Deprivation in September 2019, and is a key source of data used by HWFRS to assist in determining areas of dwelling fire risk across the two counties. An explanation of fire risk is set out in the Service's [CRMP Risk Review 2018](#).

⁷ Reports in [The Independent, August 2018](#) and [The Guardian, October 2019](#)

*Business Growth*⁸

Both counties are relatively prosperous, though factors such as some rural areas being remote from motorway and rail networks and poor broadband connectivity have tended to constrain economic growth, especially in Herefordshire. An indication of the strength of the economy is a measure termed the Gross Value Added (GVA), which looks at businesses' contribution to the economy. In 2017, Herefordshire's GVA was £3,878 million, up 8 per cent from 2016, while in 2016 Worcestershire's GVA was £12,883 million. While overall growth has been good and local business confidence remains high, the UK as a whole is seeing record levels of business insolvency, which is seen as partly linked to Brexit uncertainty and the weak economic outlook.

In Herefordshire and Worcestershire between 2015 and 2017, the number of new businesses created (16,215 enterprises) outweighed the number of business failures (9,300). However, in 2018 business 'deaths' outweighed business 'births' by 50 per cent (7,315 deaths against 4,865 births). While this may be related to the overall economic outlook, it could also be linked to a particularly large increase in business registrations by management companies in Bromsgrove over the previous three years.

Both counties have ambitious plans for economic growth with around 580 hectares⁹ of new employment land envisaged by 2030-31. Much of the development aims to centre on the growing technology and knowledge economy. In Herefordshire, the Hereford Enterprise Zone at Rotherwas will continue to be the main focus new employment in the county, and there are other strategic employment sites at Hereford, Leominster, Ledbury and Ross-on-Wye. Worcestershire aims to grow its economy by a third creating over 25,000 jobs across the county¹⁰. Supporting this, four strategic "game changer" growth sites have been identified:

- Worcester Growth Corridor - alongside the M5 between junctions 6 and 7, including Worcester Six Business Park;
- Malvern Hills Science Park Expansion;
- Redditch Eastern Gateway;
- South Kidderminster Enterprise Park

The two counties also have plans to grow their tourist economies. With extensive countryside and riverside landscapes along with major attractions such as the two medieval cathedrals and numerous stately homes, leisure and sporting attractions such as Sixways rugby and the West Midlands Safari Park, and various festivals including the Three Counties Show and Worcester Music Festival, which attract hundreds of thousands of visitors. Recent statistics show that the two counties have 21 million visitors a year, contributing over £1.3 billion to the local economy and sustaining 24,000 jobs.¹¹

Risk Factors

⁸ Information and data in this section is primarily taken from [Understanding Herefordshire](#), [Worcestershire Local Economic Assessment 2018](#) and the Office for National Statistics [Business Demography 2018](#) (tables 1.1b and 2.1b)

⁹ [Herefordshire Local Plan – Core Strategy 2011-2031](#) and [Worcestershire Local Transport Plan 2018-2030](#)

¹⁰ [Worcestershire Strategic Economic Plan](#)

¹¹ From [Hereford Times article](#), February 2018 and [Worcestershire County Council news article](#), October 2017

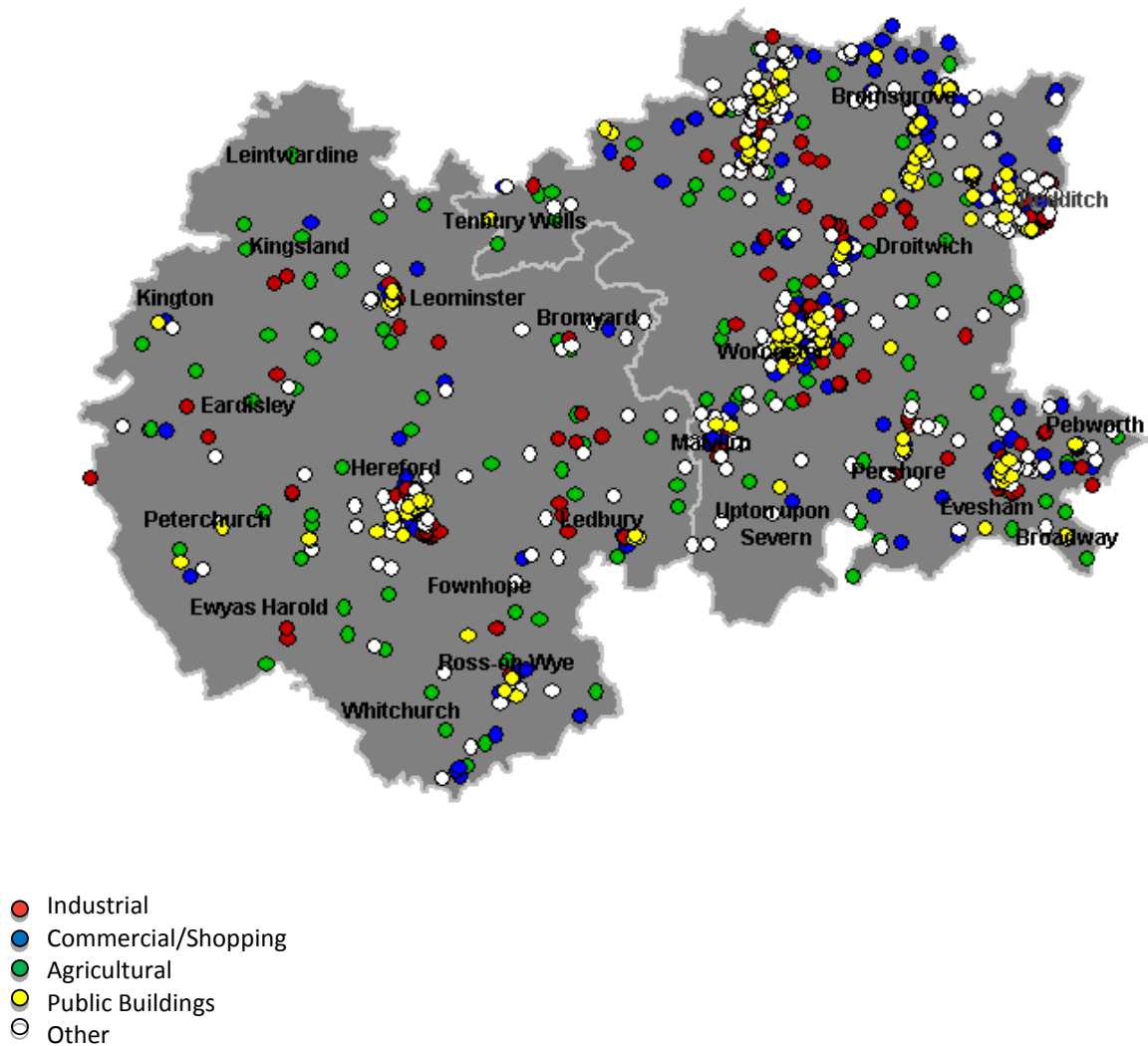
Fires affecting factories, shops, restaurants and takeaways, offices and farm buildings are generally categorized as fires in 'non-residential premises'. For the purposes of this report, the analysis has broken down the category into five broad premises types: agricultural, industrial, commercial/shopping, public buildings and other. The 'public buildings' category includes premises such as schools, hospitals and prisons, while the 'other' category includes private property such as garden sheds and garages.

In the five years 2015-16 to 2019-20, the Service attended 1,290 fires in non-residential premises, as shown in Table 2 and Map 1 below. Of these fires, a quarter (346 incidents or 26.8 per cent) were in commercial/shopping premises. 326 fires were in public buildings, of which nearly half were in the two prisons in Worcestershire, HMP Hewell and HMP Long Lartin (161 incidents or 29.4 per cent). There were 242 fires affecting industrial premises, including 24 incidents at a recycling centre near Worcester and 29 incidents at two of the industrial estates in Redditch. There were 119 fires affecting agricultural buildings over the same period, including 82 barn fires.

Table 2 - Fires in Non-Residential Premises by Financial Year 2015-16 – 2019-20

Category	2015-16	2016-17	2017-18	2018-19	2019-20	Total	%
Agricultural	18	27	24	19	31	119	9.2
Industrial	52	52	49	52	37	242	18.8
Commercial/ Shopping	84	61	59	80	62	346	26.8
Public buildings	71	83	58	57	57	326	25.3
Other	52	42	49	50	64	257	19.9
Total	277	265	239	258	251	1,290	

Map 1 - Non-Residential Fires 2015-16 - 2019-20



There are a small number of industries in the Service area, whose products or activities could have a serious impact on people’s health and safety or a damaging effect on the wider environment in the event of an accident. Those that could be extremely hazardous are subject to specific safety regulations¹², and businesses are required to take all necessary measures to prevent major accidents. The regulations mainly apply to the chemical industry and those businesses involved in producing or storing dangerous substances such as fuels or explosives. At present, five industries in the Service area are covered by the COMAH regulations.¹³

Each Fire Station maintains profiles of those businesses that may pose such a risk in their local area to ensure that the businesses themselves and firefighters are prepared should an incident occur. Over the last five years, the Service attended 38 incidents at three of the five COMAH sites, though most were false alarms (32 incidents) and there was one vehicle fire.

¹² See the [Dangerous Substances \(Notification and Marking of Sites\) Regulations 1990 \(NAMOS\)](#) and the [Control of Major Accident Hazards Regulations 2015 \(COMAH\)](#)

¹³ See [COMAH - Public information on establishments subject to the COMAH](#) on the HSE website.

With the exception of buildings such as hospitals and prisons, the majority of non-residential properties are only occupied during the daytime, when people are usually around to raise the alarm. This has helped to keep the casualty numbers down. In all, there were 67 casualties in fires affecting non-residential buildings between 2015-16 and 2019-20. Of these, 5 people were seriously injured, 28 had slight injuries and 34 were given first aid or precautionary checks at the scene. There were no fatalities. Most of the casualties were at public premises (23 casualties) and industrial premises (16 incidents). There were no casualties at the agricultural building fires.

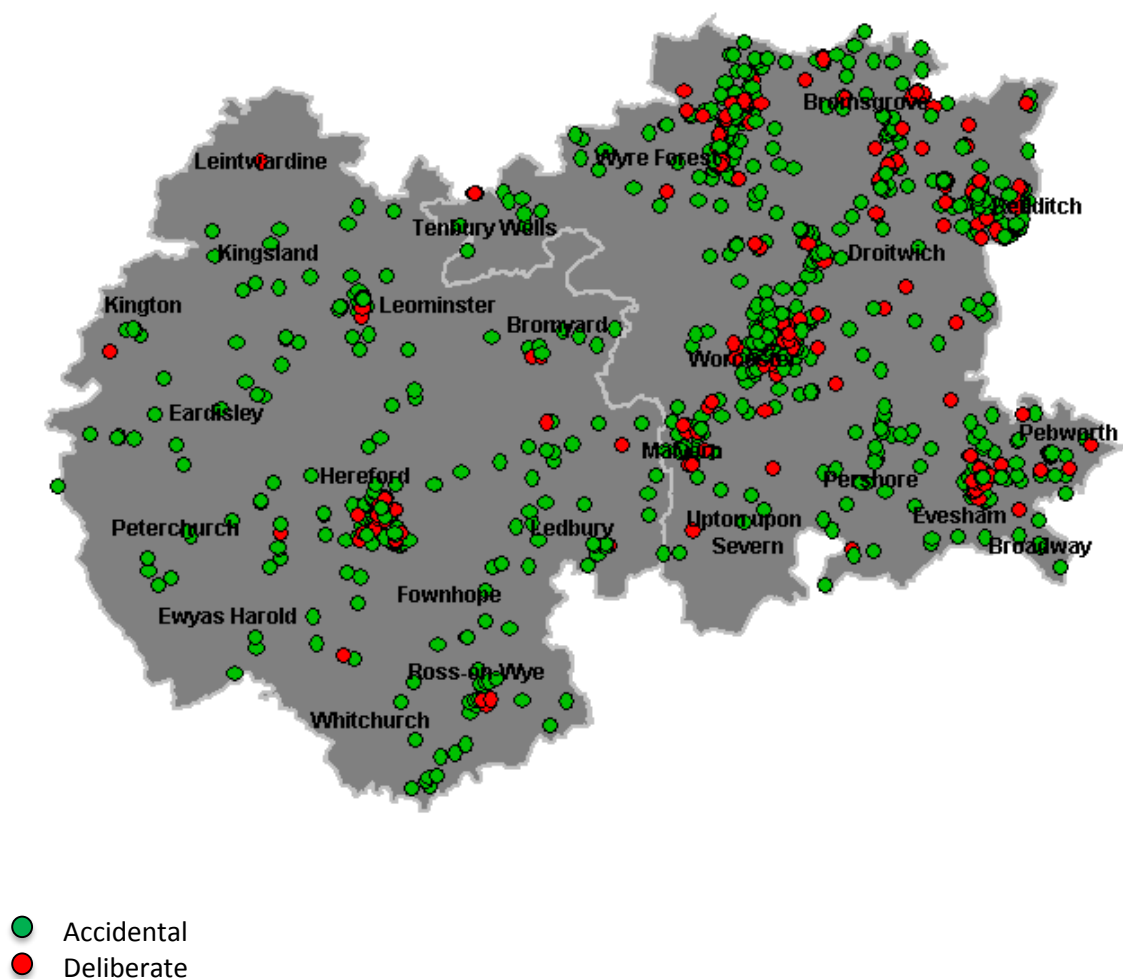
The majority of non-residential property fires were recorded as accidental (913 incidents or 71 per cent). However, more than one in four fires (377 incidents or 29 per cent) were recorded as deliberately caused. Most of these occurred at one or other of the two prisons in Worcestershire (148 fires or 39 per cent of all deliberate fires), though there were also 21 deliberate fires at schools and 20 deliberate barn fires.

Table 3 below lists the numbers of accidental and deliberate fires by the broad categories of non-domestic premises and Map 2 shows the distribution of accidental and deliberate fires in non-residential properties between 2015-16 and 2019-20, with most occurring in the main populated areas.

Table 3 - Accidental and Deliberate Fires in Non-Residential Premises by Category 2015-16 - 2019-20

Category	Accidental	Deliberate	Total	% acc.	% delib.
Agricultural	90	29	119	75.6	24.4
Industrial	222	20	242	91.7	8.3
Commercial/ Shopping	281	65	346	81.2	18.8
Public buildings	131	195	326	40.2	59.8
Other	189	68	257	73.5	26.5
Total	913	377	1,290		

Map 2 - Accidental and Deliberate Fires in Non-Domestic Buildings 2015-16 - 2019-20



There is evidence that some people and some areas have relatively more accidental fire incidents than others.¹⁴ Among the groups of people more at risk of fire are those who are unemployed or have long-term sickness or a disability. Workless households and those households in areas of employment and income deprivation or wider multiple deprivation (including a high crime rate and poor educational attainment) are also at greater risk. The Service uses a Fire Risk model to help to identify particular groups and local areas that are more likely to have accidental fires. As noted earlier, this is explained in more detail in the Service's CRMP Risk Review 2018 (see footnote 6 above).

While the evidence in the previous paragraph relates primarily to dwelling fires, with over 7,000 businesses failing in 2018 and an average of 75 deliberate fires in non-residential premises each year, there is potential for arson and insurance fraud. According to the Association of British Insurers

¹⁴ See research carried out by Greenstreet Berman Ltd. presented in the [Fire and Rescue Service partnership working toolkit for Local Area Agreements, DCLG 2008](#) and [Learning Lessons from Real Fires: Findings from Fatal Fire Investigation Reports](#) (Research Bulletin no. 9, June 2006, DCLG)

(ABI) 29 per cent of commercial fire claims in the UK can be considered as 'deliberate', and in 2015, the average commercial fire claim was over £25,500, a 165 per cent increase since 2004.¹⁵

In terms of business growth, the plans to grow the economy focusing on strategic employment sites may present additional risks to the Service, particularly in relation to increased road traffic flows to and from the new sites. Likewise, the plans to boost tourism will bring more visitors into the two counties. This is likely to increase traffic flow across the two counties, especially during warmer summer months. It may also increase the risk of fires in the open and water-related incidents as more people access the countryside, rivers, canals and historic buildings of the two counties.

¹⁵ [Arson Prevention Forum, State of the Nation 2017](#)