



# The employment structure in Epping Forest District



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## The employment structure in Epping Forest District

### Executive summary

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Epping Forest District has higher employment in the Construction and Distribution sectors compared with the average area in England. 'Construction of buildings'<sup>1</sup> and 'Specialised construction activities'<sup>2</sup> account for 4,500 jobs where a national average of 1,700 would normally be expected. There is, however, much less employment in (i) Financial services and (ii) Public administration, education and health compared with other areas.

In terms of the number of new businesses created, and the number of businesses within the geographical area, Epping Forest District continued to perform well in 2009 and 2010. Although traditionally less entrepreneurial areas appear to be beginning to 'catch-up', the district still has a high number of businesses relative to England as a whole, and this seems to be stable. Remarkably, despite the recession, in March 2013 there were more registered businesses in the district than in March 2009.

Detailed study of the businesses in the district confirmed that planning policy has been successful in concentrating larger retail outlets in the six town centres. But around half of employment is still outside the areas designated by planning policy for employment. A lot of employment appears to be based in domestic premises – especially in the Construction, Business, Professional and (possibly) the Property sectors. This emphasises the limits of traditional planning policy in terms of its direct effect on the location of employment.

All the evidence points to the continuation of high levels of out-commuting for work. Detailed 2011 Census data on the subject will be released in 2014, but it is likely that the district still has far more out-commuters than in-commuters. At the same time, the proportion of residents who were dependent on employment outside the district decreased between 2001 and 2011, as it did between 1991 and 2001.

Despite the 2008/9 recession, the district is estimated to have had higher overall employment in 2011 than in 2008. Within that increase, the official figures suggest that Construction employment declined markedly during the recession, but this was more than compensated for by increases in employment in Public administration, education and health<sup>3</sup>

As a result of the recession, unemployment among district residents rose substantially, as did unemployment in England as a whole. However, it was still below the national average for unemployment. There is little evidence of the very large-scale unemployment among construction workers that might have been expected.

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<sup>1</sup>This is the name of a UK Standard Industrial Classification (SIC) Code. SIC codes are used by the Office for National Statistics to categorise different types of businesses. 'Construction of buildings' includes general construction of buildings of all kinds, incorporating work, repair, additions and alterations.

<sup>2</sup> 'Specialised construction activities' includes construction activities which are usually specialised, such as pile-driving, foundation work, concrete work, brick laying, scaffolding and roof covering.

<sup>3</sup> 'Public administration, education and health' includes local government, schools, healthcare, fires services, public order and judicial activities.

## 1. Employment in Epping Forest District

The district's employment is notably different from the average local authority area in four respects. These are:

1. It is 'mobile'
2. It is dominated by small businesses
3. The high skill-high reward relationship
4. It is 'traditional'

### 1.1 'Mobile'

This is to do with (a) the level of out-commuting and (b) the nature of some of the district's most important businesses.

(a) The term 'containment' is used to describe the proportion of people who work within the district where they live. It is unsurprising that this district, with more London Underground stations than most outer London Boroughs, has a high level of out-commuting. This means that it has a low level of containment compared with most districts around London, let alone the rest of England. Although there is some in-commuting from workers living in adjoining areas, this is much less than the level of out-commuting.

(b) Epping Forest District has an extraordinarily high level of employment in the construction industry. These workers will typically report to a depot in the district (at least in principle) but spend their time wherever the job to which they are assigned is located – taking advantage of the easy access to London and, using the M11 and M25, to the South East/ East. This means that much of the construction employment recorded as being within the district is actually taking place elsewhere. The good transport links also benefit managers or small business/ property owners who prefer to live in Epping Forest District but whose business dealings span London. This means they can travel to a variety of sites and that clients and workers can easily visit their Epping Forest District base. Essentially this is about activities which are mobile and/or subject to short-term contracts as a result of the trend towards outsourcing (publicity/ advertising/ marketing, construction, site management, cleaning etc.). Epping Forest District is therefore technically 'home' to many of these types of business, even although the activities take place elsewhere.

### 1.2 Dominated by small businesses

The 'West Essex Employment Structure' report shows that Epping Forest District has a high number of businesses compared to its resident population. This is especially notable given the low jobs density and high levels of out-commuting characterising the district. This suggests that local economic life is dominated to an unusual degree by small businesses - the district has relatively few large private and public sector employers.

Although the district has high numbers of businesses of almost every type, certain sectors dominate, e.g. Construction - there is a construction business present in every Lower Super Output Area, (smaller than an electoral Ward). This refers only to VAT registered businesses and not to self-employed people. It is likely that, taking into account the smaller businesses which are not VAT registered, the district has even more construction companies than the official figures suggest.

### 1.3 The high skill-high reward relationship

Nationally, in general, a workforce with high skills is expected to have higher earnings and a greater level of productivity. This proves true for Hertfordshire, as it has both 20% higher earnings than the average for England, and 20% more residents with higher education qualifications than the national average. Kent proves the point in the other direction – it has lower earnings and fewer with higher qualifications than average. This relationship does not apply in Epping Forest District. Average earnings in the district are on a par with those in Hertfordshire and comfortably higher than those in Hampshire, Kent and the rest of Essex. In terms of high and middle-level qualifications, however, the district's economically active workforce is below the England average.

### 1.4 'Traditional'

The district is practically devoid of out-of town shopping centres, modern business parks and large urban extensions. Its town centres are notable for retaining a proportion of independent retailers.

The proportion of the population of the district that arrived in the UK since 2001, at 3%, is lower than in any of its Essex neighbours or any Hertfordshire district. The district still registers a notably large difference between the employment rate of men and that of women (11.8% – 2011 Census).

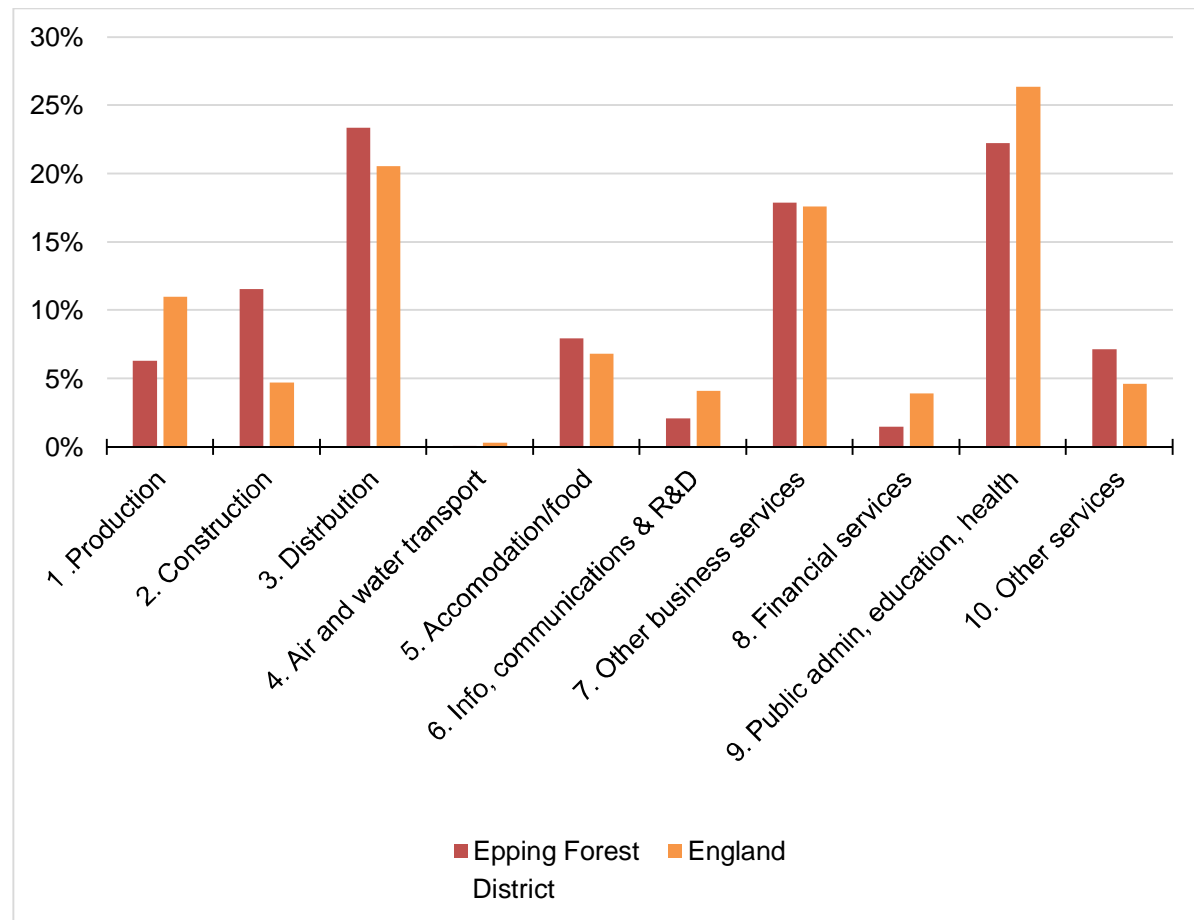
### 1.5 Are these characteristics connected?

All the above aspects of the district's employment are probably connected. Taking the last point, commuting often causes difficulties for balancing work and family commitments and therefore discourages the employment of mothers. (The construction industry's prominence and the small size of the public sector also do little to encourage much female employment). The absence of business parks fits with large corporations playing a minor role in local business. The impact of their recruitment practices on qualification levels and immigration is therefore muted relative to the case in other areas. The same goes again for the small size of the public sector. Small firms might be more inclined to recruit family members and on the basis of personal recommendations rather than on paper qualifications. Being conscious of this, young people may be less motivated to seek higher qualifications. However, the level of earnings in the district makes it difficult to argue that the relatively low level of its residents' qualifications has held them back.

## 2. The district's employment by sector

The pattern of employment by broad industrial sector in the district differs in some notable respects from that of England as a whole. It has much larger percentages of its workplace-based employment in the construction and distribution sectors. This almost certainly reflects its position on the doorstep of London, a world city, and its proximity to transport infrastructure connecting it with the rest of the country and overseas.

Figure 1: Percentage of total workplace employment by sector, 2011



Source: Business Register and Employment Survey (BRES) see p39\*

Balancing this concentration are much lower percentages of employment in: (i) Production; (ii) Information, communications and research and development; (iii) Financial services and (iv) Public administration, education and health. Most of these contrasts are unsurprising and of long standing. Much of the public sector is found in London (e.g. universities, teaching hospitals, civil service departments) or dispersed to regions. Financial services have long been heavily concentrated in London, with little back-office work being carried out locally - it is much easier to off-shore such functions. Activities associated with printing banknotes in Loughton provide a notable exception to this rule.

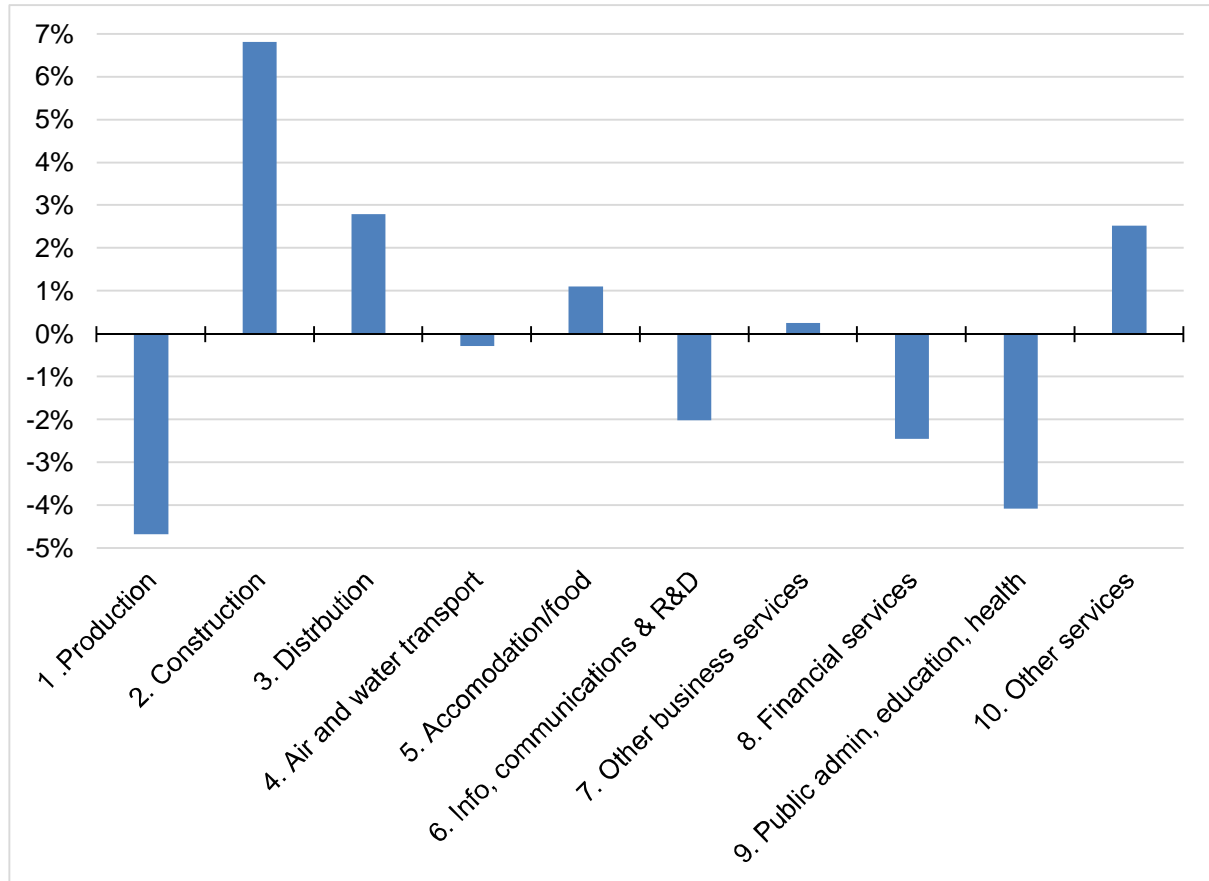
Figure 1 shows that the pattern of employment in the district has notable similarities with that in England. The two biggest sectors are shared, even if their order differs. These are: (i)



Distribution (retail, wholesale, warehousing land transport etc.) which is the district’s largest broad sector; (ii) Public administration, education and health, which is England’s largest sector. (The reversing of the order is not surprising, given that only 13% of the district’s employment is in the public sector, as against 20% in England).

Figure 2 clearly shows the differences between the district and England as a whole.

**Figure 2: Percentage differences in employment by sector: Epping Forest District versus England, 2011**



Source: Business Register and Employment Survey (BRES) see p38\*

## 2.1 Sectoral employment in detail

Location Quotients (LQs) are used in Table 1. These are the factors relating the proportions of employment in sectors locally to those in a larger area (England). If the LQ for a sector in a locality is 1.0 it has the same proportion of its employment in that sector as does England, but if it is 0.5 it has only half the proportion. Important sectors in employment terms have LQs greater than 1.0 - these are shaded green in Table 1. These can be thought of as local specialisms, and Table 2 identifies the absolute number of extra jobs associated with these local specialisms. This also shows that the district's Construction strength is in buildings and not in civil engineering (a sector which is notably absent from the district).

The presence of Education as the top employing sector (Table 1) might appear surprising. However, in an out-commuting area with little employment relative to the local population, services to residents are often more important in the employment mix. Primary education is provided very locally, so the pattern of educational employment tends to stick closely to that of the resident population. In that respect Education is very different from Health, which has much employment concentrated in a few large hospitals.

The presence of Retail in second place (Table 1) is slightly misleading. With a Location Quotient of 1.0 it has an 'average' presence in the district *relative to other forms of employment* but this translates to a below average presence *relative to the resident population*. This is again due to the 'out-commuting' character of the district and also to the relatively small size of the district's centres compared with other centres in close proximity.

After the two construction sectors, Sports, amusement and recreational activities account for the most extra jobs (Table 2). This is due to two factors:

- The 'arrival' of a unit in the district which has recently transferred most of its activities to a neighbouring London Borough. The 'arrival' is questionable (it should almost certainly have been counted as present earlier) and, as the activity involved has little connection to the rest of the sports and recreation sector in the district, even the departure should be of little significance. It should, however, reduce the prominence of this sector in such tables in future years;
- The second factor has been the growth of (very) part-time employment in the district's leisure centres. Normally, economists count employment without making a distinction between part-time and full-time, and this probably does not result in a distorted picture being presented. But as in this particular case the number of hours per job is very low both the size and growth of the workforce have been exaggerated in the analysis.

While the district has a large number of golfing facilities, the growth in such employment has not been notable in more recent years – it could be that, encouraged by landfill tax arrangements, the district is close to saturation point.

**Table 1: Employment by top sectors, 2011, with 2008-2011 trends in Location Quotients indicated**

Top sectors	No. (000)	%	Location Quotient – see explanation in text	Trend
Education	4.5	10.7%	1.2	↑
Retail trade	4.5	10.5%	1.0	→
Food and beverage service activities	2.9	6.9%	1.3	→
Construction of buildings	2.4	5.6%	4.0	↓
Wholesale trade	2.4	5.6%	1.3	↓
Specialised construction activities	2.1	5.0%	1.9	↓
Sports activities and amusement and recreation activities	1.5	3.6%	2.5	↑
Human health activities	1.4	3.4%	0.5	↓
Residential care activities	1.4	3.2%	1.3	↑
Warehousing and support activities for transportation	1.3	3.1%	2.0	↓

**Table 2: Employment by 2-digit SIC codes with the most additional jobs due to high Location Quotients**

Sectors	No. (000)	%	LQ	Additional. (000)
Construction of buildings	2.4	5.6%	4.0	1.8
Specialised construction activities	2.1	5.0%	1.9	1.0
Sports activities and amusement and recreation activities	1.5	3.6%	2.5	0.9
Warehousing and support activities for transportation	1.3	3.1%	2.0	0.7
Education	4.5	10.7%	1.2	0.6
Food and beverage service activities	2.9	6.9%	1.3	0.6
Wholesale trade	2.4	5.6%	1.3	0.6
Real estate activities	1.1	2.6%	1.5	0.4
Services to buildings/ landscape activities	1.3	3.0%	1.4	0.3
Residential care activities	1.4	3.2%	1.3	0.3

## 2.2 Knowledge-based sectors

While it is generally agreed the knowledge economy cannot be confined to particular sectors, it is sometimes helpful to focus on those sectors deemed the most knowledge intensive. These typically are highly productive and demand a highly skilled workforce.

The analysis below uses the European Commission's definitions but combines the two manufacturing categories as the first of these is often very small.

**Table 3: Definition of knowledge-based industries and services**

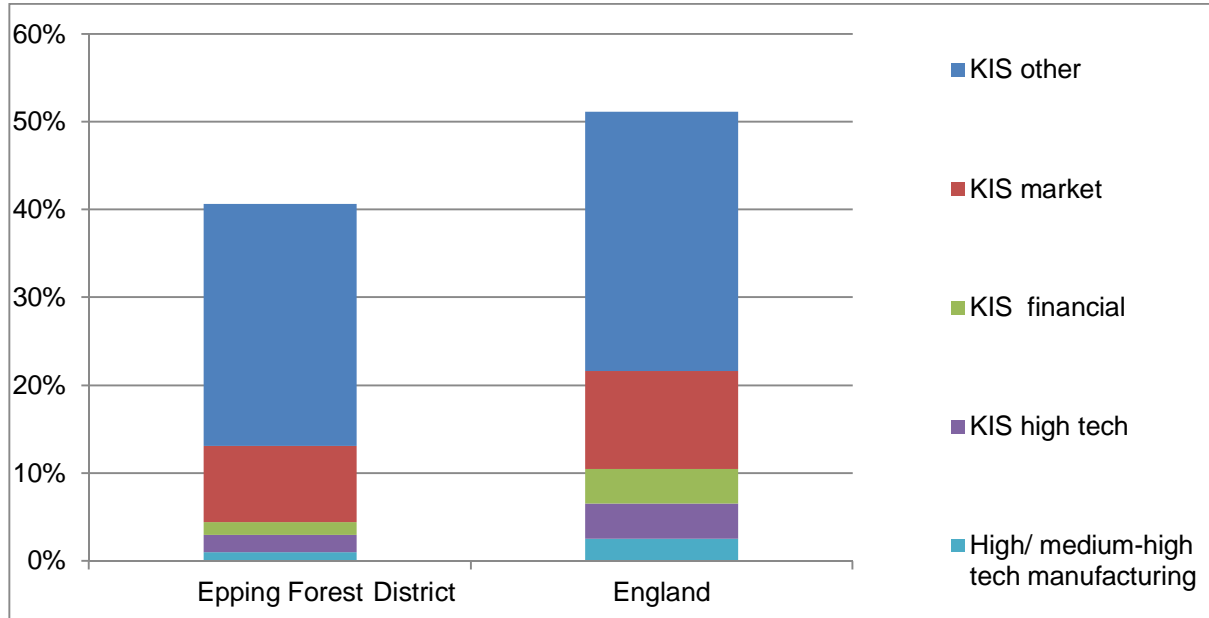
<b>High-tech manufacturing</b>	<b>21</b> Manufacture of basic pharmaceutical products and pharmaceutical preparations <b>26</b> Manufacture of computer, electronic and optical products <b>30.3</b> Manufacture of air and spacecraft and related machinery
<b>Medium-high-tech manufacturing</b>	<b>20</b> Manufacture of chemicals and chemical products <b>25.4</b> Manufacture of weapons and ammunition <b>27 to 29</b> Manufacture of electrical equipment, Manufacture of machinery and equipment n.e.c., Manufacture of motor vehicles, trailers and semi-trailers <b>30</b> Manufacture of other transport equipment <b>excluding 30.1</b> Building of ships and boats, and <b>excluding 30.3</b> Manufacture of air and spacecraft and related machinery <b>32.5</b> Manufacture of medical and dental instruments and supplies
<b>Knowledge-intensive services (KIS) -High-tech</b>	<b>59 to 63</b> Motion picture, video and television programme production, sound recording and music publishing activities, Programming and broadcasting activities, Telecommunications, Computer programming, consultancy and related activities, Information service activities <b>72</b> Scientific research and development
<b>Knowledge-intensive services (KIS) -financial</b>	<b>64 to 66</b> Financial and insurance activities (section K)
<b>Knowledge-intensive services (KIS) -market</b>	<b>50 to 51</b> Water transport, Air transport <b>69 to 71</b> Legal and accounting activities, Activities of head offices; management consultancy activities, Architectural and engineering activities; technical testing and analysis <b>73 to 74</b> Advertising and market research, Other professional, scientific and technical activities <b>78</b> Employment activities <b>80</b> Security and investigation activities
<b>Knowledge-intensive services (KIS) - other</b>	<b>58</b> Publishing activities <b>75</b> Veterinary activities <b>84 to 93</b> Public administration and defence, compulsory social security (section O), Education (section P), Human health and social work activities (section Q), Arts, entertainment and recreation(section R)

Source: [http://epp.eurostat.ec.europa.eu/cache/ITY\\_SDDS/Annexes/htec\\_esms\\_an3.pdf](http://epp.eurostat.ec.europa.eu/cache/ITY_SDDS/Annexes/htec_esms_an3.pdf)

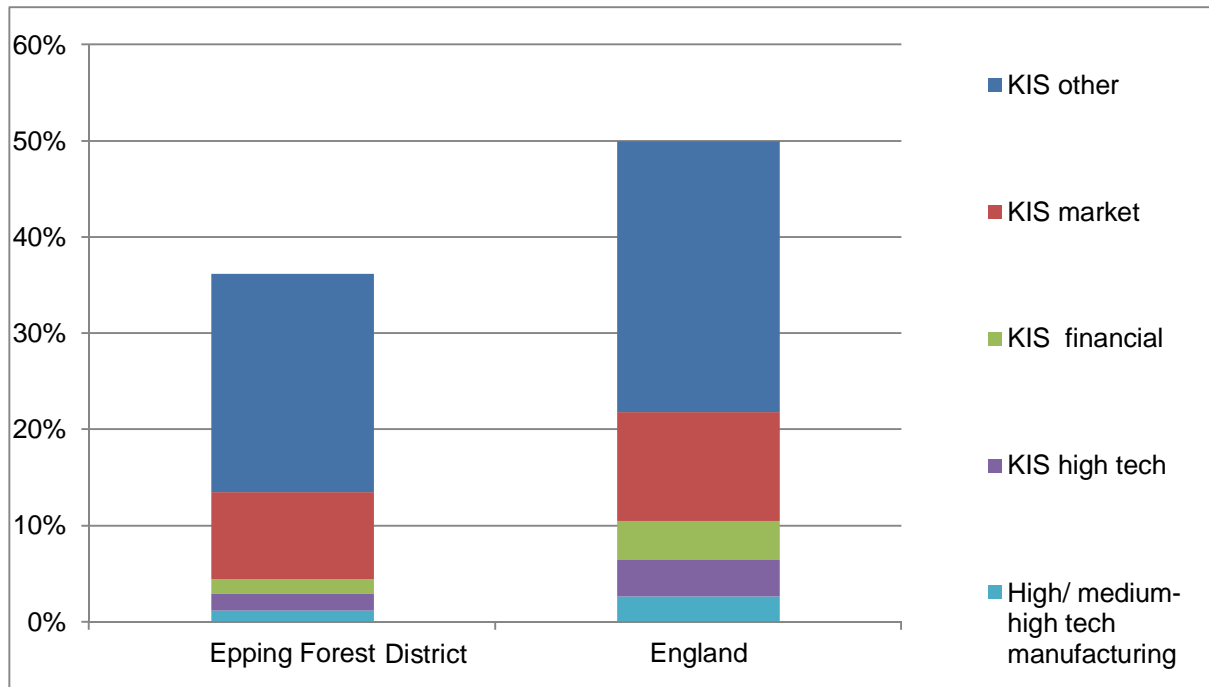
In the context of a looking at a small area like the district it is also worth making a distinction between the narrow group of knowledge-based industries and services where the data tend to be more reliable and the two where they are less so. As can be seen from Table 3, KIS-market services and KIS-other include some of the most problematic activities in terms of

information reliability. Within KIS-market services temporary staff may often be working outside the district concerned. Within KIS-other, human health employment is often accounted for in the 'wrong' district, and it includes many activities which are much less knowledge-intensive. This analysis therefore concentrates on those Narrow Knowledge-based Industries and Services where there is robust and reliable information.

**Figure 3: Share of total employment in knowledge-based industries and services, 2011**



**Figure 4: Share of total employment in knowledge-based industries and services, 2008**



Sources: Business Register and Employment Survey (BRES) see p39\*

Figure 3 and 4 show that, in both 2008 and 2011, Epping Forest District had a substantially lower proportion of knowledge-based employment than did England as a whole. This is the

case for all knowledge-based industries and services and for the Narrow Knowledge-based Industries and Services as defined above (and highlighted by the use of a black border in the figures). But it is clear that the district compares particularly badly in relation to the narrow grouping. This is not just because its manufacturing and financial services sectors are so small, because it is also the case with High-tech Knowledge-intensive Services such as Film, TV, Research and Development and computer programming. In the case of such activities and financial knowledge-intensive services, the district has less than half the share of total employment compared with England as a whole.

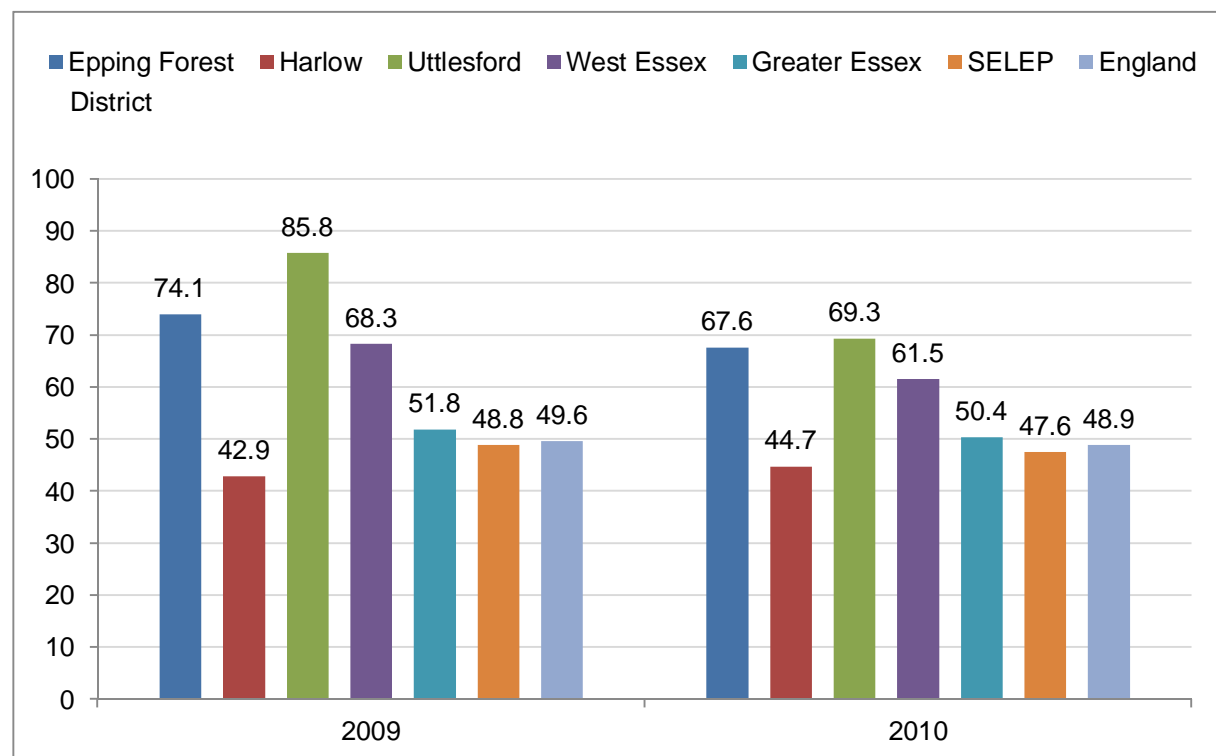
The headline total knowledge-based employment in Epping Forest District grew substantially between 2008 and 2011, but this was largely to do with increases in education employment (almost certainly in existing establishments) in the KIS-other category.

### 3. Enterprise

#### 3.1 How Epping Forest District performs compared with other areas

Employment depends to a large extent on a thriving private sector and an entrepreneurial culture. The current coalition government sees business as the driver of economic growth and aims to make the UK one of the easiest countries in which to set up a small business<sup>4</sup>. This policy is in line with those of previous administrations, as fostering enterprise has long been a common objective. The birth of new enterprises was targeted by means of a National Indicator (NI 171). This is based on all new non-public sector registrations for PAYE or VAT<sup>5</sup>. Although NI171 is no longer officially calculated, the data for 2009 and 2010 were included as part of 'The employment structure in West Essex' report<sup>6</sup>. Figure 5 below shows how well Epping Forest District performed in these two years, helping West Essex comfortably to exceed the national average in terms of new business registrations.

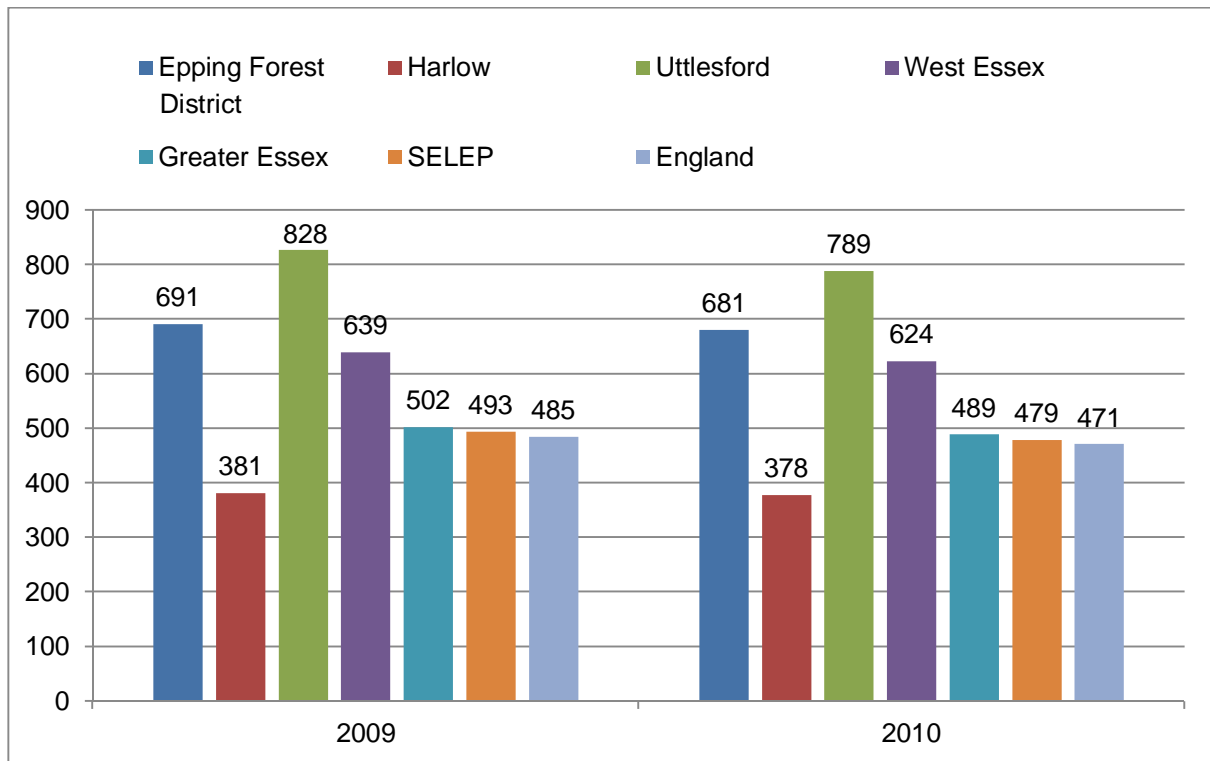
Figure 5: New business registrations per 10,000 residents aged 16+



<sup>4</sup> Department for Business, Innovation and Skills Business Plan (<http://www.bis.gov.uk/about/priorities>)

<sup>5</sup> It therefore does not cover sole traders not registered for VAT (i.e. with turnover below £77,000 and not choosing to register voluntarily).

<sup>6</sup> 'The employment structure in West Essex report' is available at: <http://www.westessexalliance.org/resources/West%20Essex%20Employment%20Structure%20Final%20Report.pdf>



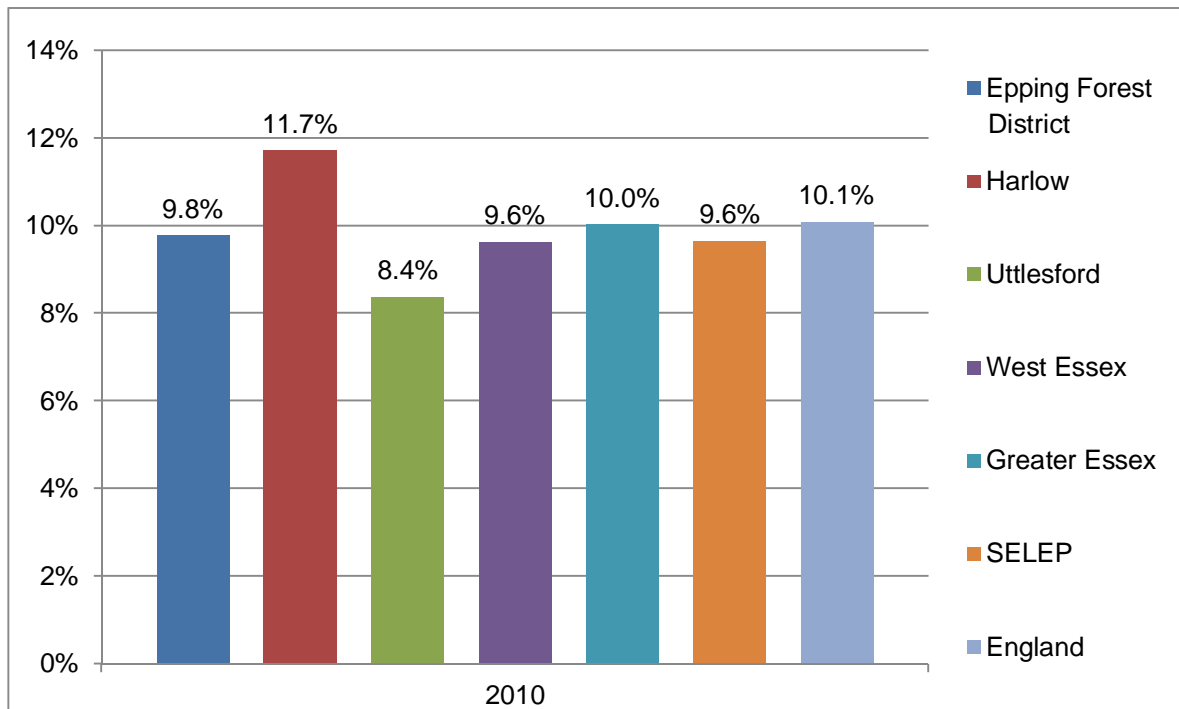
Sources: ONS mid-year population estimates (downloaded from Nomis October 2012) and ONS Business Demography 2010 see p48\*

SELEP = South East Local Enterprise partnership

Uttlesford and Epping Forest Districts again stand out in terms of how new business registrations would appear to be related to the large numbers of enterprises already present in their areas. However, a very different perspective on relative performance is shown in Figure 7 in which new business registrations in 2010 are compared with the 2009 stock of businesses in each area. From this perspective Harlow's performance is relatively good and Uttlesford's relatively poor. Epping Forest District is very close to the average, be it for West Essex, Greater Essex, the South East LEP area or England as a whole. As a result there is little indication that the district is on course to lose its advantage in terms of the number of businesses it hosts.



Figure 7: New business registrations per existing business active in the previous year



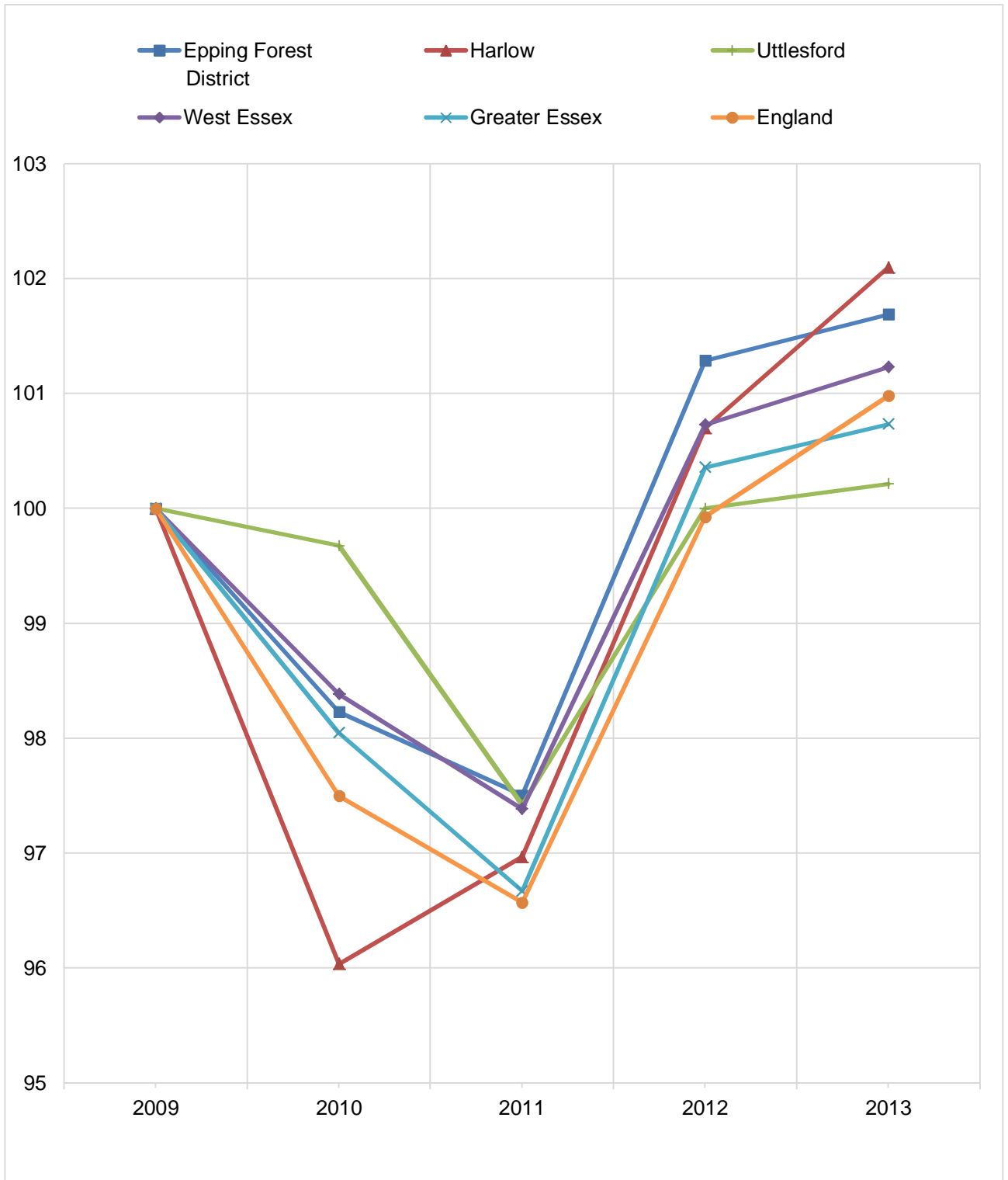
Source: ONS Business Demography 2010 see p39\*

SELEP = South East Local Enterprise partnership

In all the areas the reduction in the rate of new registrations in 2010 and in the stock of businesses between 2009 and 2010 clearly follows the credit crunch and recession of 2008-2009. The West Essex report used another source (Business Activity, Size and Location 2012<sup>7</sup>) to examine whether these trends were continuing. The 2013 data are now available and are included in Figure 8 below.

<sup>7</sup> Its methodology differs in detailed respects so the absolute numbers should not be compared, but both products should eventually capture similar trends.

Figure 8: Numbers of registered business in March (indexed 100= March 2009)



Source: UK Business: Activity, Size and Location (2013, 2012, 2011, 2010 and 2009 editions) see p38\*

Figure 8 shows that the reduction in the stock of registered businesses was essentially corrected between March 2011 and March 2012, and by March 2013 the number of

businesses was higher than in March 2009 in all the comparator areas. Harlow is the exception in that it suffered an earlier fall and enjoyed an early recovery.

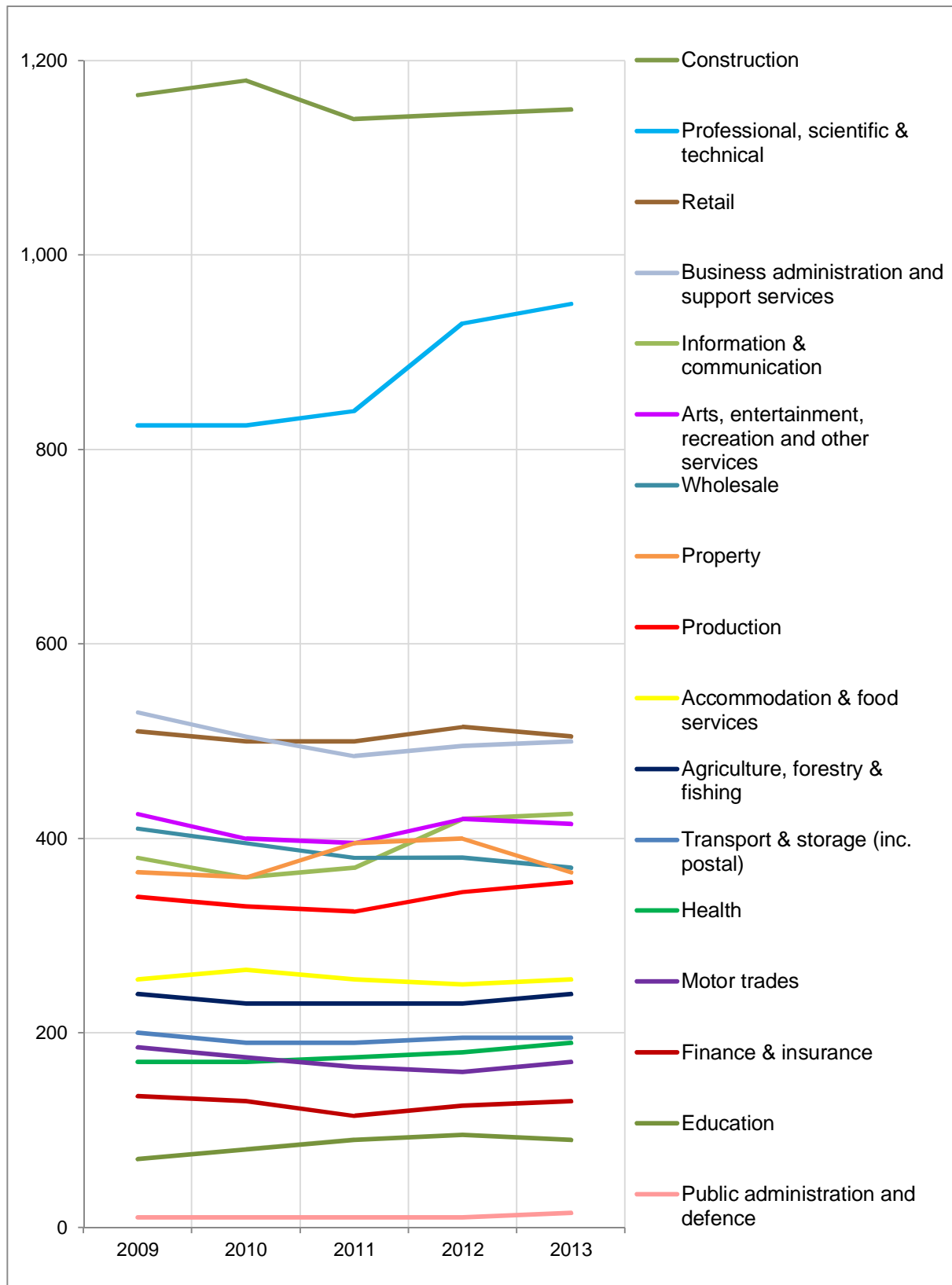
Although the number of Construction enterprises registered in all the areas has decreased, this part of the country was spared the scale of reductions elsewhere in England (possibly because of the relative buoyancy of the London housing market and/or the effect of the London 2012 Olympics). The recovery continued in this district and by March 2013 the number of construction businesses was only 1.3% below the 2009 figure (in England as a whole the number of such businesses was 10.5% down).

### 3.2 Epping Forest District performance in more detail

The changes in the number of businesses per sector between March 2009 and March 2013 are given in Figure 9 below. The largest reductions occurred within the Construction, Motor and Wholesale sectors. This was counterbalanced by a striking increase in businesses in the Professional, scientific and technical sector. This covers a multitude of disciplines but among the more important ones in employment terms for the district are accountants, architects, engineers and management consultants. The reasons for this increase are currently unclear.

These recent changes should not obscure the fact that, in March 2012, Epping Forest District had, for England, either an average or an above average number of businesses in every sector and that in Construction and Wholesale it had twice the England average number of businesses per person aged 16 or over.

Figure 9: Change in the number of enterprises by sector, Epping Forest District, 2009-2013



Source: UK Business: Activity, Size and Location 2009, 2010, 2011, 2012, 2013 see p38\*

### 3.3 Epping Forest District businesses in particular sectors

The district is so dominated by small businesses that in many sectors there is little difference between the number of registered enterprises registered and the number of units (shops, offices, factories, etc.).

Table 4 compares the numbers employed per enterprise in the district and in England as a whole, and shows the relationship between employment per unit, and the number of units per enterprise in the district. It starts with those sectors that are particularly prominent in terms of the numbers of enterprises present in the district relative to the pattern in England, i.e. those that give the district its special characteristics.

#### 3.3.1 Property

Property businesses (e.g. estate agents, landlords etc.) form an important part of the business stock in the district. As there are only 5% more local units than enterprises this indicates that the industry is dominated by local firms and that each employs very few people. Although there were about 400 registered firms in 2012, many will not be as 'public-facing' as the high street estate agencies and will include small scale 'buy to let landlords' registered for VAT and/or PAYE. As private rented accommodation has a relatively small market share in the district and this has not expanded as much as elsewhere since 2001, it would seem likely that these landlords own property outside the district. The number of landlords within the sector probably explains the low numbers employed per business.

#### 3.3.2 Construction

There are over one thousand construction firms in the district - 18.2% of the total of registered businesses. Most of these are very small – the proportion being significantly higher than the average in England. Every small area (Lower Super Output Area) in the district has some construction employment registered in it (and, this is very different, at least 42 construction workers resident in it). It is likely that the number of such firms is even higher, as a significant number of very small businesses (from the Interdepartmental Business Register) are also likely to be involved in construction activities. The employment trend, however, has been downward. In both England and Epping Forest District, employment has fallen in recent years by more than the number of enterprises, but this divergence has been more pronounced in the district, where employment per enterprise fell from 5.4 in 2009 to 4.1 in 2012.

#### 3.3.3 Wholesale

Like construction, this is a very important sector in employment and business terms, with little difference between the number of local units and enterprises. But the employment per enterprise is much lower than in England, suggesting that the district strength might be in medium, small and micro enterprises. The largest local concentration of wholesale employment is a number of enterprises near North Weald. Other, smaller concentrations are located around Nazeing and Ongar. This suggests a strong association with agriculture/horticulture. The district's supplier base and proximity to the London wholesale markets would appear to explain this sector's strength.

### 3.3.4 Business administration and support services

This sector has much higher employment per enterprise than the Property, Construction and Wholesale sectors. Most of this is accounted for by employment and cleaning agencies. In both cases it is likely that a few businesses are responsible for most of the employment. Some of the activities will be outside the district – it is very likely for instance that much of the cleaning work carried out by agencies registered in the district will actually be in London. It is also probable that some employment agency and cleaning work in the district will be registered elsewhere.

### 3.3.5 Retail

Retail has a relatively high number of local units compared with enterprises (20% more). The importance of multiples in the sector is well known and as a result of the employment per enterprise figure is inflated considerably by the presence in the district of businesses such as Tesco headquartered elsewhere. Employment statistics will therefore tell us little about the distribution of the district's 'own' retail businesses.

### 3.3.6 Professional, technical and scientific

These businesses are the second biggest sector in business terms in the district and are responsible for most of the increase in businesses numbers in recent years. Nationally, they tend to employ few people per business. In Epping Forest District the employment ratio (by enterprise or by unit) is markedly lower than other sectors. It would seem likely, given the characteristics of the professions covered, that there will be large numbers of single-person enterprises and small partnerships in the district.

### 3.3.7 Agriculture, forestry & fishing

The high employment ratio in the district is probably related to the Lea Valley Glasshouse Industry rather than agriculture and the close association between growing and packing in horticulture.

Table 4: Characteristics of enterprises in the different sectors, 2012

Sector	Employment per enterprise Epping Forest District	Employment per enterprise England	Employment per unit Epping Forest District	Units per Enterprise in Epping Forest District
Property	2.8	6.0	2.6	1.05
Construction	4.1	5.1	4.1	1.00
Wholesale	6.2	11.0	6.2	1.01
Business administration and support services	14.9	15.4	14.0	1.06
Transport & storage (inc. postal)	12.2	19.4	10.8	1.13
Retail	8.7	15.3	7.2	1.20
Arts, entertainment, recreation and other services	7.2	8.6	6.5	1.12
Professional, scientific & technical	3.0	6.0	2.9	1.04
Production	7.4	20.1	7.2	1.03
Finance & insurance	4.9	22.9	4.1	1.20
Education	47.9	73.1	32.5	1.47
Information & communication	2.1	6.7	2.1	0.99
Motor trades	4.6	7.7	4.4	1.06
Agriculture, forestry & fishing (inc. Harlow)	6.8	3.6	6.7	1.02
Public administration and defence	113.0	287.4	45.2	2.50
Accommodation & food services	13.5	15.2	10.7	1.26
Health	21.1	39.5	14.4	1.47

Sources: UK Business: Activity, Size and Location- 2012 and Business Register and Employment Survey (BRES) see p39\*

### 3.4 Business location

The Government's Interdepartmental Business Register (IDBR) includes most of the PAYE-registered businesses in the district. It contains the names, addresses, main industrial activities, and employment numbers of thousands of shops, offices and factories. Analysis of the IDBR was used to:

- check the credibility of reported employment numbers and trends;
- examine the workspace occupied per job by different categories of business (by matching the IDBR employment figures to Valuation Office Agency records);
- examine the role of town centres and employment areas in providing premises for various types of employment.

The first exercise was successful and much of the analysis in this report rests on employment figures adjusted as a result. The second only underscored the difficulty in generalising about space requirements in this district. The third exercise is described below and summarised in Table 5.

Although the focus was on employment in town centres (major and minor, as defined by Epping Forest District Council's policy TC1 from the Local Plan Alterations 2006) and designated employment areas (policies E1 to E7 from the Local Plan Alterations 2006), the analysis also covered the rest of the district, including suburban areas and rural wards as follows:

- Urban wards
  - Major town centres
  - Minor town centres
  - Employment areas
  - Suburban areas – not in a town centre, employment area or rural ward
- Rural wards - Hastingwood, Matching and Sheering Village; Moreton and Fyfield; High Ongar. Willingale and the Rodings; Passingford; Broadley Common, Epping Upland and Nazeing; Waltham Abbey High Beach.

Table 5 shows that most employment is actually located in the suburban areas of the district. This is partly a consequence of the location of a range of public services, including particularly education and health, which can also be significant employers. What is much more striking in the district is that this also applies “private” employment and to all major employment sectors apart from retail (concentrated in major town centres), transport (employment sites) and production (employment sites). Construction is a less strong exception as only 37% is on employment sites as against 35% in 'suburban' areas and 14% in 'rural' areas. This reflects the division of the industry previously mentioned – between a handful of large contractors and a large number of smaller firms.

#### 3.4.1 Effect of planning policy on business location

43% of retail employment is concentrated in the major town centres (as opposed to only 19% of total employment). This shows that planning policy has been successful in both resisting the encroachment of out-of-town shopping and in encouraging major retailers to remain in the town centres. Planning policy also appears to have been effective in channelling the more problematic activities (Transport and Production) into employment sites.

However, a significant proportion of employment in the district (57% of all and 48% of private) is in 'suburban' and 'rural' areas, i.e. outside town centres and designated employment sites. There are therefore limits to the influence planning policy can have in terms of employment location.



Table 5a: Distribution of employment by sector -Share of District's employment 2013

Employment %	Total	"Priv"	Constr.	Edu	Ret	Bus	Heath	Accom	Art	Prof	Prod	Trans	Whlsle	Public	Prop	Info	Mot	Fin	Agri
<b>Urban, incorporating::</b>	<b>87</b>	<b>86</b>	<b>86</b>	<b>91</b>	<b>93</b>	<b>88</b>	<b>90</b>	<b>74</b>	<b>88</b>	<b>87</b>	<b>82</b>	<b>96</b>	<b>80</b>	<b>96</b>	<b>95</b>	<b>96</b>	<b>85</b>	<b>99</b>	<b>38</b>
- Emp sites	21	27	37	1	13	35	8	8	9	20	51	52	35	0	2	15	47	47	0
- Major TCs	19	21	10	2	43	13	11	16	11	27	6	6	6	64	26	27	5	35	0
- Minor TCs	3	3	3	1	2	2	1	6	6	3	0	2	1	0	10	5	10	1	1
- Suburban	44	34	35	87	35	38	69	45	62	36	25	35	37	32	56	49	24	16	37
<b>Rural</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>9</b>	<b>7</b>	<b>12</b>	<b>10</b>	<b>26</b>	<b>12</b>	<b>13</b>	<b>18</b>	<b>4</b>	<b>20</b>	<b>4</b>	<b>5</b>	<b>4</b>	<b>15</b>	<b>1</b>	<b>62</b>

Table 6b: Distribution of employment by sector – Employment per unit 2013

Employment per unit	Total	"Priv"	Constr.	Edu	Ret	Bus	Heath	Accom	Art	Prof	Prod	Trans	Whlsle	Public	Prop	Info	Mot	Fin	Agri
<b>Urban, incorporating:</b>	<b>8.4</b>	<b>6.8</b>	<b>5.7</b>	<b>39.0</b>	<b>9.5</b>	<b>5.9</b>	<b>16.0</b>	<b>9.9</b>	<b>8.9</b>	<b>3.9</b>	<b>8.0</b>	<b>18.0</b>	<b>9.1</b>	<b>46.8</b>	<b>3.8</b>	<b>3.3</b>	<b>8.0</b>	<b>7.9</b>	<b>5.9</b>
- Emp sites	15.7	15.8	18.3	3.3	19.4	14.5	18.4	21.2	9.0	8.6	17.9	80.6	10.9	N/A	0.9	6.3	14.4	25.5	N/A
- Major TCs	11.3	10.4	10.2	22.5	13.7	9.1	9.4	6.2	4.4	7.3	6.6	9.3	7.7	64.9	3.4	11.3	7.5	6.9	N/A
- Minor TCs	5.8	5.4	7.8	58.0	5.5	3.7	9.7	6.0	6.9	3.3	1.7	5.3	2.6	N/A	11.5	3.1	16.0	2.3	3.0
- Suburban	6.4	4.1	3.1	42.1	6.2	3.6	18.0	12.5	11.4	2.4	4.0	9.9	8.3	30.2	4.0	2.2	3.9	3.1	6.0
<b>Rural</b>	<b>6.4</b>	<b>5.6</b>	<b>4.0</b>	<b>16.5</b>	<b>7.1</b>	<b>4.8</b>	<b>22.7</b>	<b>17.0</b>	<b>6.6</b>	<b>3.9</b>	<b>5.3</b>	<b>4.6</b>	<b>7.8</b>	<b>46.0</b>	<b>2.1</b>	<b>2.0</b>	<b>4.5</b>	<b>1.6</b>	<b>4.9</b>
<b>Overall</b>	<b>8.1</b>	<b>6.6</b>	<b>5.4</b>	<b>34.7</b>	<b>9.3</b>	<b>5.7</b>	<b>8.6</b>	<b>11.1</b>	<b>8.6</b>	<b>3.9</b>	<b>7.4</b>	<b>16.1</b>	<b>8.8</b>	<b>46.8</b>	<b>3.6</b>	<b>3.2</b>	<b>7.2</b>	<b>7.5</b>	<b>5.3</b>

Notes:

- "Priv" indicates "Private" meaning all employment not in the following sectors: Edu; Health; and Public.
  - **Constr** is Construction.
  - **Edu** is Education;
  - **Ret** is Retail.
  - **Bus** is Business administration and support.
  - **Heath** is Human health and social work.
  - **Accom** is Accommodation and food service.
  - **Prof** is Professional, scientific and technical.
  - **Prod** is Production (Manufacturing plus Mining, quarrying and utilities).
  - **Trans** is Transport is Transportation and storage.
  - **Whlsle** is Wholesale.
  - **Public** is Public administration and defence.
  - **Prop** is Property (or Real estate).
  - **Info** is Information and communication.
  - **Mot** is Motor trade.
  - **Fin** is Financial and insurance.
  - **Agri** is Agriculture, forestry and fishing
- Bakers Lane in Epping is both in a Major Town Centre and is an employment site. For this purpose it has been considered solely as part of a Major TC. Highbridge Retail Park in Waltham Abbey is a Minor Town Centre and an employment site. For this purpose it has been considered solely as an employment site.
- Rural here means the wards as listed in section 3.4. Employment sites include Fyfield Business Park but for the purpose of this exercise the fact that tiny part of its employment in a 'rural ward' has been disregarded. A similar disregard has been applied in connection with some 'employment site' employment in High Beach.

Source: Interdepartmental Business Register extract as of March 2013 provided to Epping Forest District Council.

### 3.4.2 Working from home

The employment per unit ratios in the construction, business, and professional broad sectors indicate that larger units are based on employment sites and major town centres and much smaller units are located in 'suburban areas' - i.e. much of the latter employment is based in domestic premises.

Due to the mobile nature of construction work, it is reasonable to assume that workers for the larger companies will be employed on sites throughout the country or at least the region around London and have little need to attend their Epping Forest District 'workplace', or even to live in the district. The home based smaller construction firms are more likely to be involved in the smaller and more local projects.

In the business and professional sectors also, including IT professionals, the employment numbers per unit and the share of employment in suburban areas suggest a high degree of home working.

## 4. Commuting

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An accurate and reasonably up to date picture will only emerge after the workplace-based information from the 2011 Census of Population is published

### 4.1 2001 Census data

In April 2001, of the district's 57,845 resident workers, 35,787 (or 62%) commuted out of the district for work, and 26,137 (or 45% of resident workers) had London as their destination. The district stood out among other East of England authorities and other areas outside London in terms of both the number and proportion of its residents dependent on London for employment.

In total 15,028 commuted from Epping Forest District to Inner London. This is 57% of the district's London commuters or 42% of all its commuters. This means more than a quarter of the district's resident workers commuted to Inner London in 2001.<sup>8</sup>

While the district was also a destination for commuters from London, the numbers were comparatively low and as a result the balance of commuting was overwhelmingly in the direction of London. The district had by far the largest net commuting into London (approximately 19,000) compared with all other equivalent authorities.

The district was in rough balance with nearby districts in terms of commuting flows.

### 4.2 Trends in commuting

Overall, net commuting from Epping to all destinations outside the district in 1991 is estimated to have been approximately 19,000, roughly the same as in 2001. But the population working in the district grew a lot faster (9%) than the number of resident workers (5%). So between 1991 and 2001 the district became less dependent on outside sources of employment, i.e. the proportion of workers living in the district needing to find work outside fell, even though the balance of commuting flows remained static in absolute terms.

The Office of National Statistics (ONS), using the 2001 Labour Force Survey and the 2008 Annual Population Survey, released some estimates of gross commuting. The conclusion was that there had been an increase in commuting to the City of London between 2001 and 2008. More recently ONS released detailed commuting estimates for 2011. These suggest that net commuting from the district was around 18,000 and that, as was the case previously, this balance was roughly the same for commuting to and from London. As far as the City of London is concerned this only shows a slight increase in the number of commuters from the district since 2001 (3,913 as against 3,668). This together with the 2008 estimates suggests there might have been a fall off in commuting to the City since 2008, probably reflecting the influence of the 'credit crunch'.

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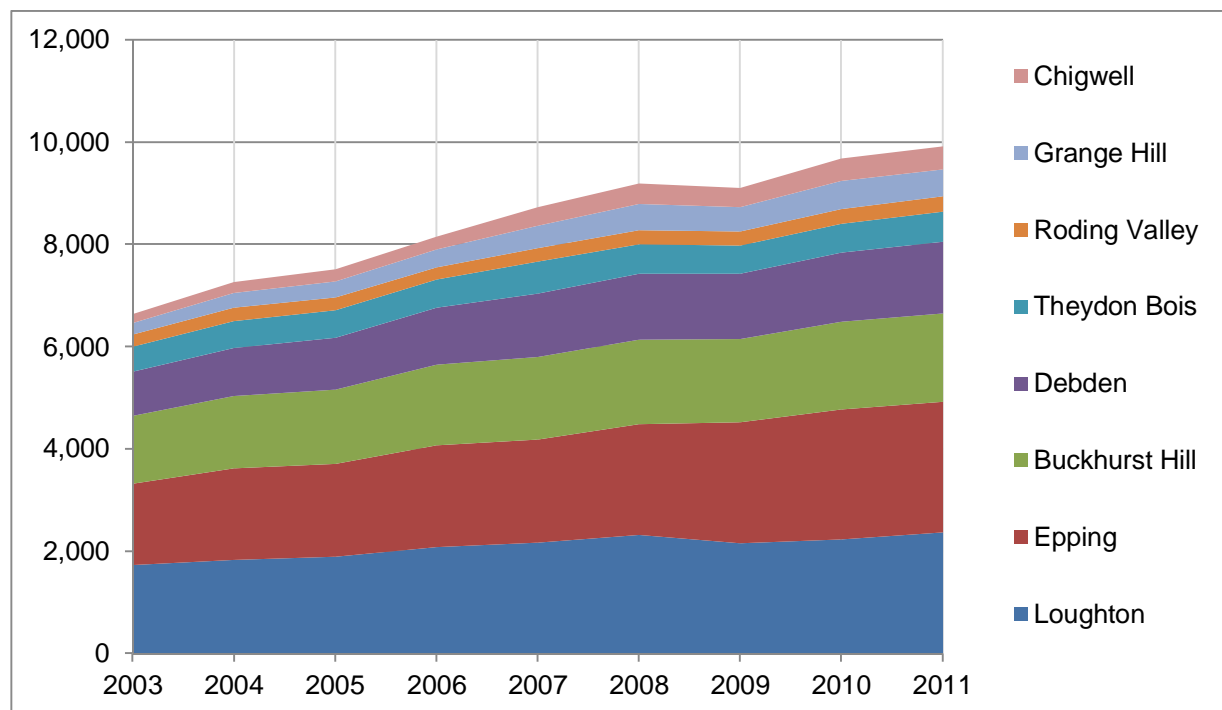
<sup>8</sup> Sources: 2001 Census, Special Workplace Statistics SWS103  
(Taken from: DMAG Briefing 2007-03, February 2007, Commuting in London, GLA) and Nomis.

More indications as to changes in commuting can be drawn from Transport for London statistics. In 2001 31% of district commuting to London was by underground (8% by overground rail and 2% by bus). For the City of London and Westminster the figures are higher still - 67% by underground and 22% by rail for the City of London and 71% and 12% for Westminster.

Figure 10 below shows the weekday morning peak entries to Central Line stations in the district between 2003 (the earliest year for which data are available) and 2011. The 2001 Census tells there were 8,098 district residents commuting by underground to London. In 2003 there were 6,640 morning peak entries. The ratio of these two numbers allows an estimate of the increase in commuting by underground from the district to London between 2003 and 2011 - nearly 4,000.

Figure 10 shows that the upward trend was barely dented by the 2008/9 recession and resumed thereafter. The trend is not only consistent with the ONS estimate that commuting into the City increased, but it also suggests that the higher level of commuting in 2008 might have endured.

**Figure 10: Morning London Underground station entries, 2003-2011**



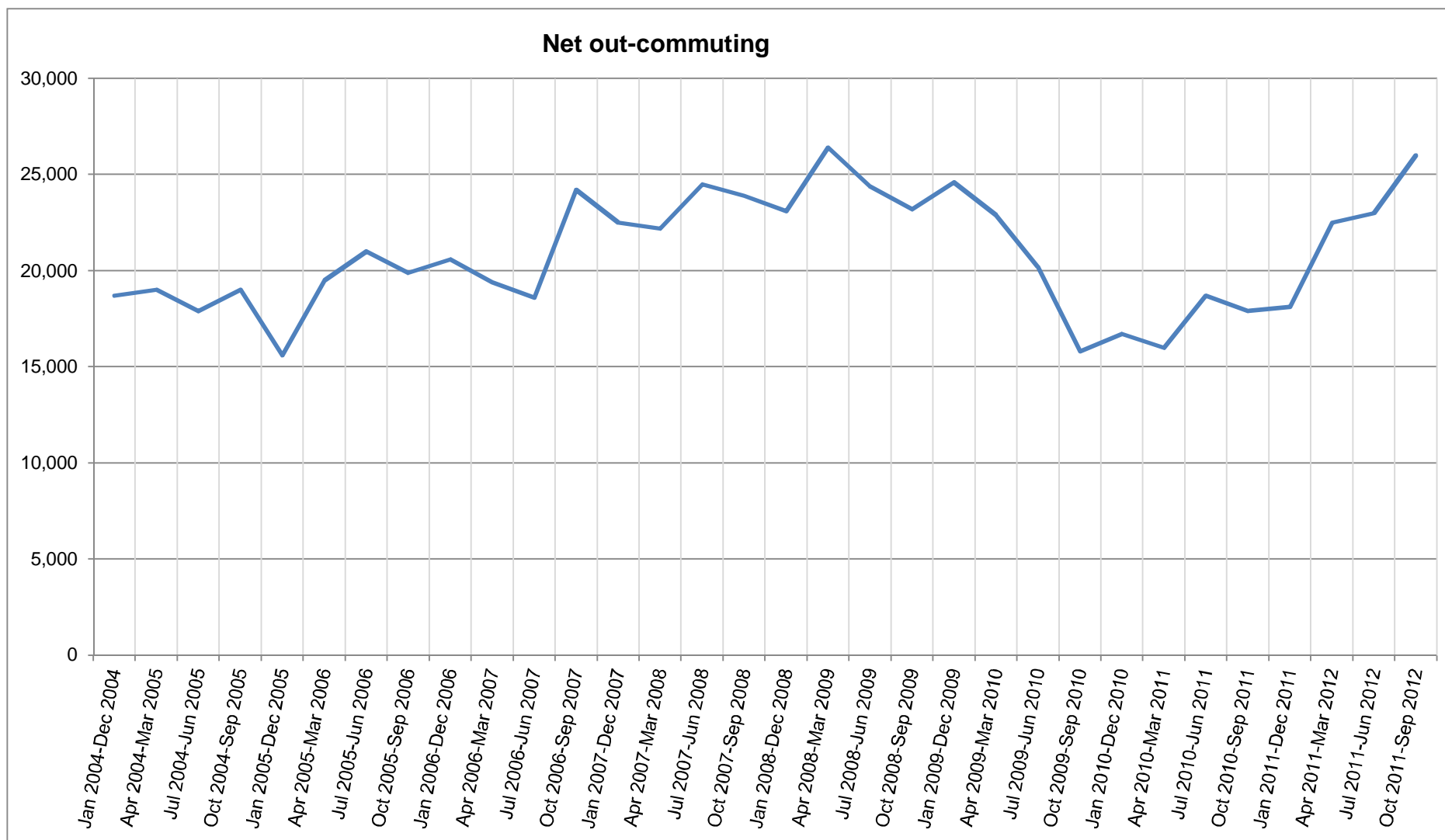
Source: Transport for London

Residence-based results from the 2011 Census have been released which show an increase between 2001 and 2011 of 3,005 or 34% in the number whose principal method of travel to work was 'underground, metro, light rail, or tram' since 2001. The other principal long-distance travel modes (driving a car and by train) increased roughly in line with the 6% increase in the resident workforce. The increase in underground use does not therefore appear to be the result of commuters switching from road or rail to underground, and it is fairly safe to conclude that a large increase in commuting to London occurred between 2001 and 2011.

Evidence on changes in commuting into the district also suggests an increase. There appears to have been an increase in commuting by underground to Debden since 2001 even after a substantial fall from a peak in 2008. Estimates drawn from the Annual Population Survey suggest that commuting from London was running at 9,164 in 2011, a figure more than 2,000 higher than that from the 2001 Census.

The difference between the district's workplace- and residence-based employment has been calculated for every overlapping four quarters for which the Annual Population Survey reports data. These suggest that net commuting increased from 2004 (when it was around the same level, 19,000, as recorded in the 2001 Census) to around 25,000 in 2008 before falling back during the 2008/9 recession and resuming its upward course thereafter. This provides some reason to expect that when the 2011 Census commuting figures are released in 2014, they will show a slight increase in net commuting. However, due to the increase in the resident working population this does not necessarily mean that the district has become more dependent on employment elsewhere.

Figure 11: Net out-commuting from the Annual Population Survey, 2004-2012



Source: Office for National Statistics, see p39\*

## 5. How the district fared through the recession

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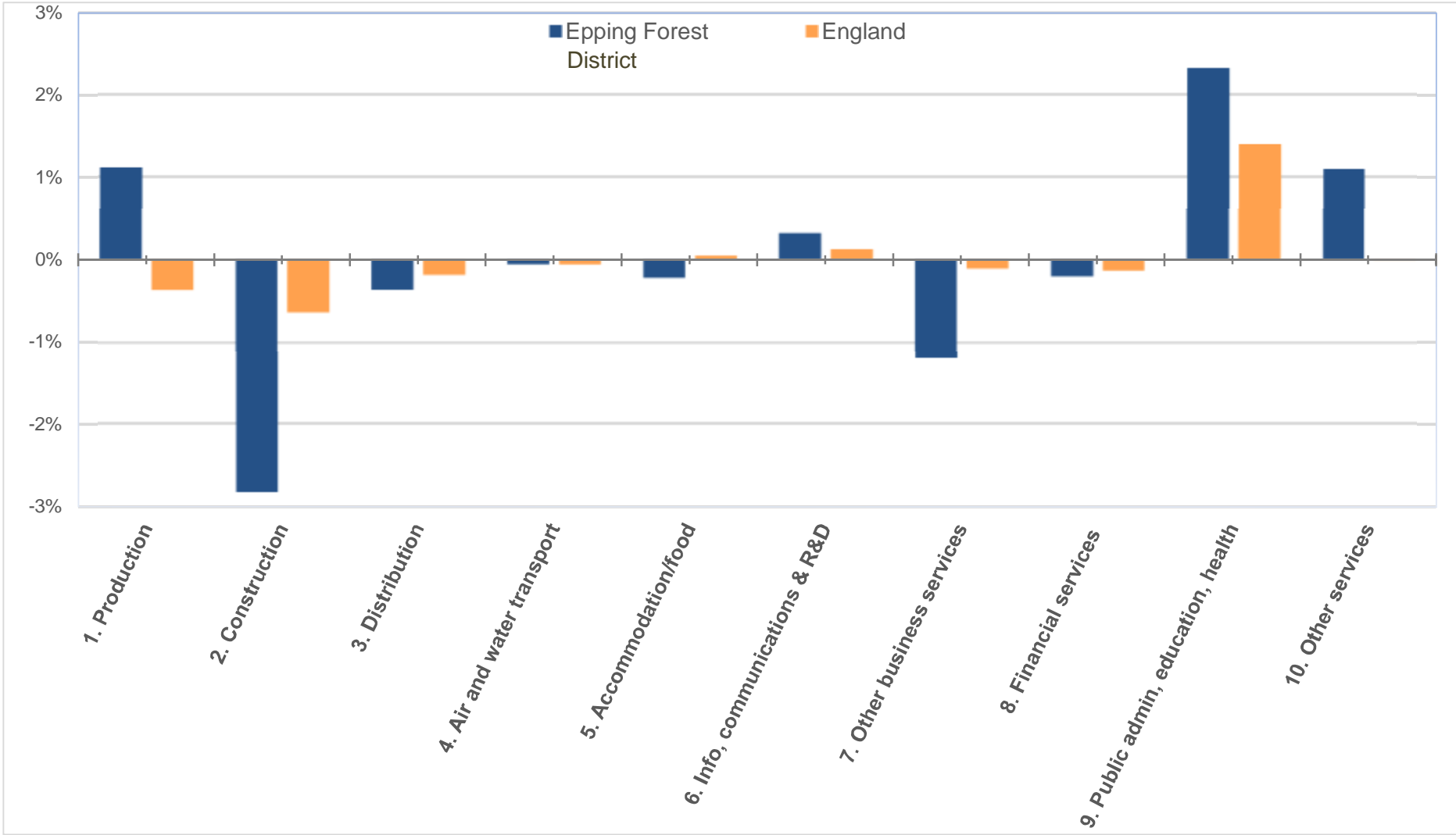
### 5.1 Impact on employment

'The employment structure of West Essex' study reported that, on the basis of the key business survey, the Business Register and Employment Survey (BRES), the number of jobs in Epping Forest District increased by 849 or 2% between (September) 2008 and (September) 2011. In England there was a decrease of 3% and 5% in West Essex as a whole. Using individual enterprise data from the Interdepartmental Business Register (IDBR) some adjustments have been made to the 2008 and 2011 BRES figures for the district. The net effect of these changes is minor - jobs growth was still registered but it was only 73 or 0.2% - this was despite substantial adjustments to the jobs figures. The total for 2008 was reduced by 2,600 from 45,100 to 42,500 and that for 2011 by 3,400 from 46,000 to 42,600.

This may be the best possible estimate of the change in employment in the district over a crucial period in which much of the effect of the 2008/9 recession was registered in England. Nevertheless, it should be treated with caution. Firstly, it captures only employees and working proprietors of PAYE- and VAT-registered businesses. Many of the self-employed will not be included. Smaller businesses, with which the district abounds, are not surveyed every year.

In the case of certain construction firms registered in the district, there have been puzzlingly large swings in their large numbers of employees in recent years. It may be that these changes owe more to changes in accounting within large groups than they do changes in employment 'on the ground' in the district, but in any event, the change in construction employment figures must be treated with caution.

Figure 12: Changes in the percentage of employment by sector, 2008-2011



Source: Business Register and Employment Survey (BRES) see p39\*



Table 7: Employment numbers (thousands) by sector, 2011

	1. Production	2. Constructn.	3. Distribution	4. Air and water transport	5. Accomm/ food	6. Info, comms & R&D	7. Other business services	8. Financial services	9. Public admin, education, health	10. Other services	Total
<b>Epping Forest District</b>	2.6	4.9	10.0	0.0	3.4	1.0	7.5	0.6	9.5	3.0	42.6
	6%	12%	23%	0%	8%	2%	18%	1%	22%	7%	100%
<b>England</b>	2,310.1	1,136.6	4,948.5	75.8	1,638.5	1,094.2	4,126.1	936.4	6,338.6	1,111.1	24,048.2
	10%	5%	21%	0%	7%	5%	17%	4%	26%	5%	100%

Source: Business Register and Employment Survey (BRES) see p39\*

Table 8: Employment numbers (thousands) by sector, 2008

	1. Production	2. Constructn	3. Distribution	4. Air and water transport	5. Accomm/ food	6. Info, comms & R&D	7. Other business services	8. Financial services	9. Public admin, education, health	10. Other services	Total
<b>Epping Forest District</b>	2.1	6.1	10.1	0.0	3.5	0.9	8.0	0.7	8.5	2.6	45.1
	5%	14%	24%	0%	8%	2%	19%	2%	19%	6%	100%
<b>England</b>	2,464.3	1,325.8	5,131.3	92.9	1,672.1	1,095.0	4,268.5	995.7	6,170.4	1,144.2	24,720.0
	10%	5%	21%	0%	7%	4%	17%	4%	25%	5%	100%

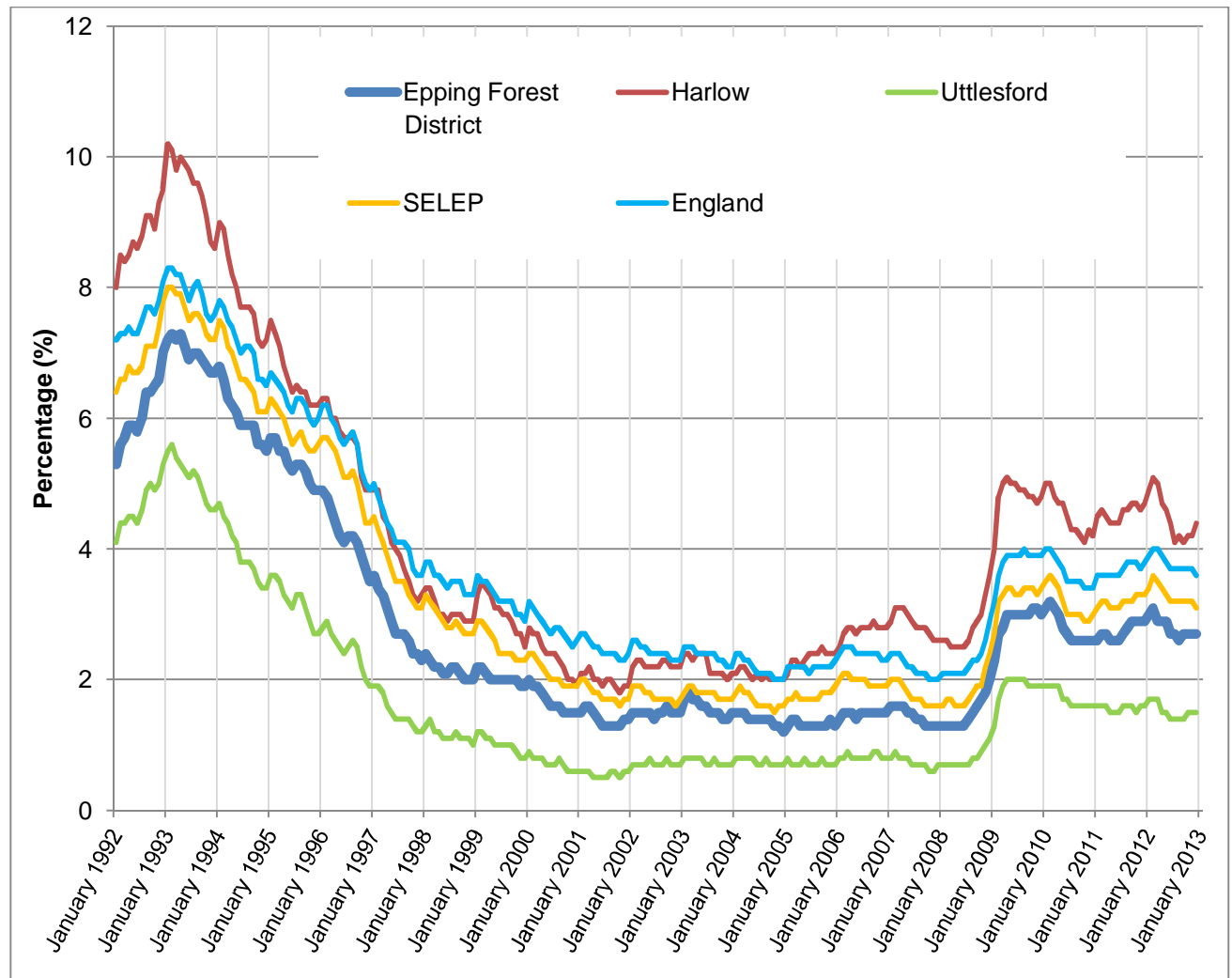
Source: Business Register and Employment Survey (BRES) see p39\*

## 5.2 Impact on unemployment

### 5.2.1 Unemployment in West Essex and Epping Forest District as a whole

In Epping Forest District in April 2008 the claimant count proportion was lower than what it was at the time of the Census in April 2001. This was not the case with Harlow and Uttlesford.

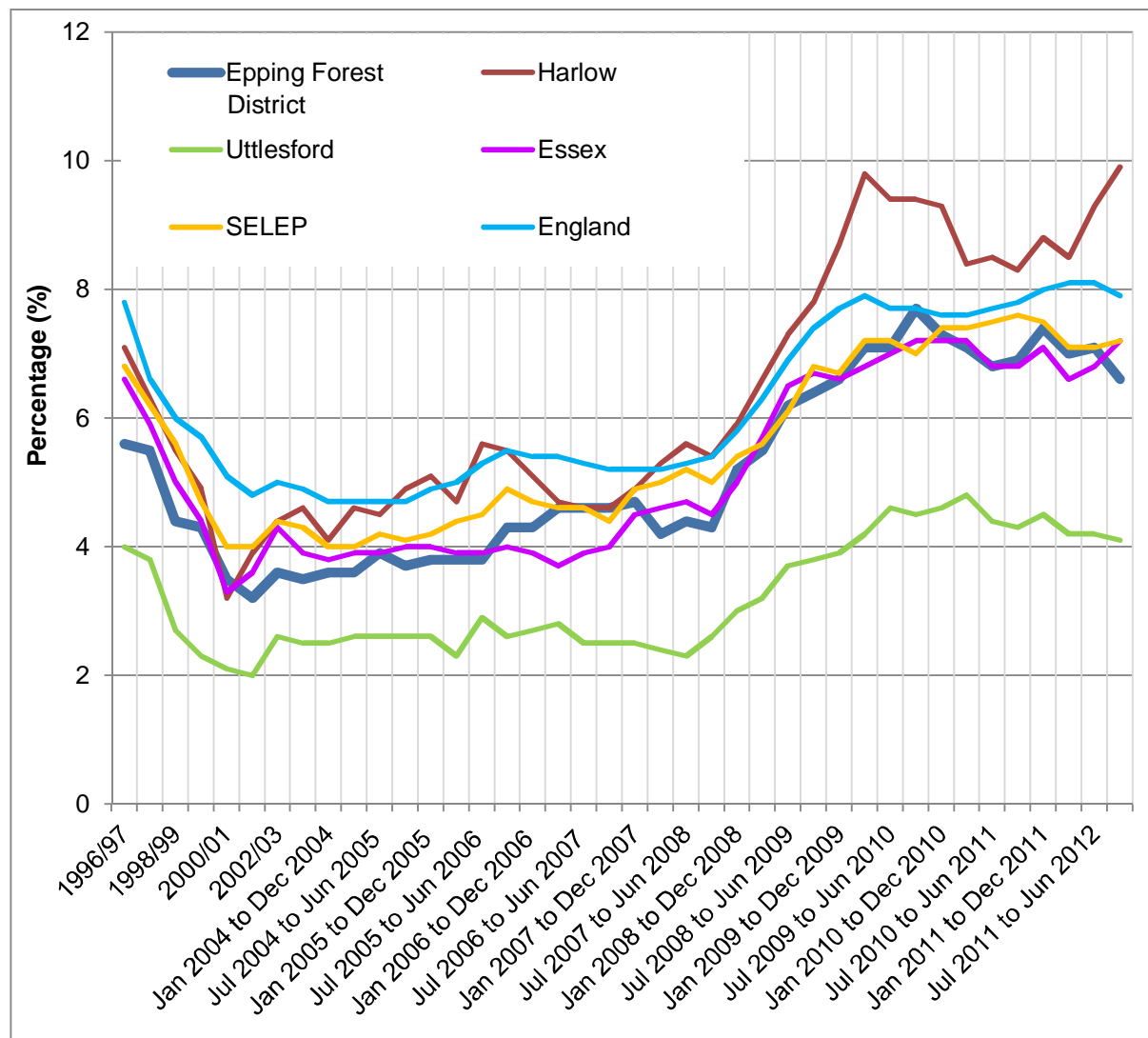
Figure 13: Claimant count proportions, 1992-2012



SELEP = South East Local Enterprise Partnership

In more prosperous areas, such as Uttlesford and Epping Forest District, the claimant count is a poor indicator of the level of unemployment. The unemployment rate, monitored by the ONS, is used for the unemployment headlines every month in UK. It is measured by survey and is unaffected by entitlement to benefits. However, because of time lags it is less current than the claimant count, and because of survey sample sizes it is unreliable at the local authority level. It gives the best indication available of trends in unemployment in recent years. For reasons to do with the level of out-commuting in the district, the unemployment rate is rather high compared to other indicators. This partly explains why the district's unemployment rate is similar to those in SELEP and Essex in the Figure 14 below.

Figure 14: ONS modelled unemployment 1996-2012



From both Figures 13 and 14 it is clear that, from 2000 to 2008, the labour market in West Essex was characterised by relatively low unemployment compared with England as a whole and compared to its own experience in the 1990s. However, the recession ushered in rapid increases in unemployment in West Essex. These were most keenly felt in Harlow where both the claimant count proportion and the unemployment rate exceeded those for England and least keenly felt in Uttlesford. In Epping Forest District the impact of the recession was severe, but perhaps less than might have been anticipated considering the importance of construction to the district's employment.

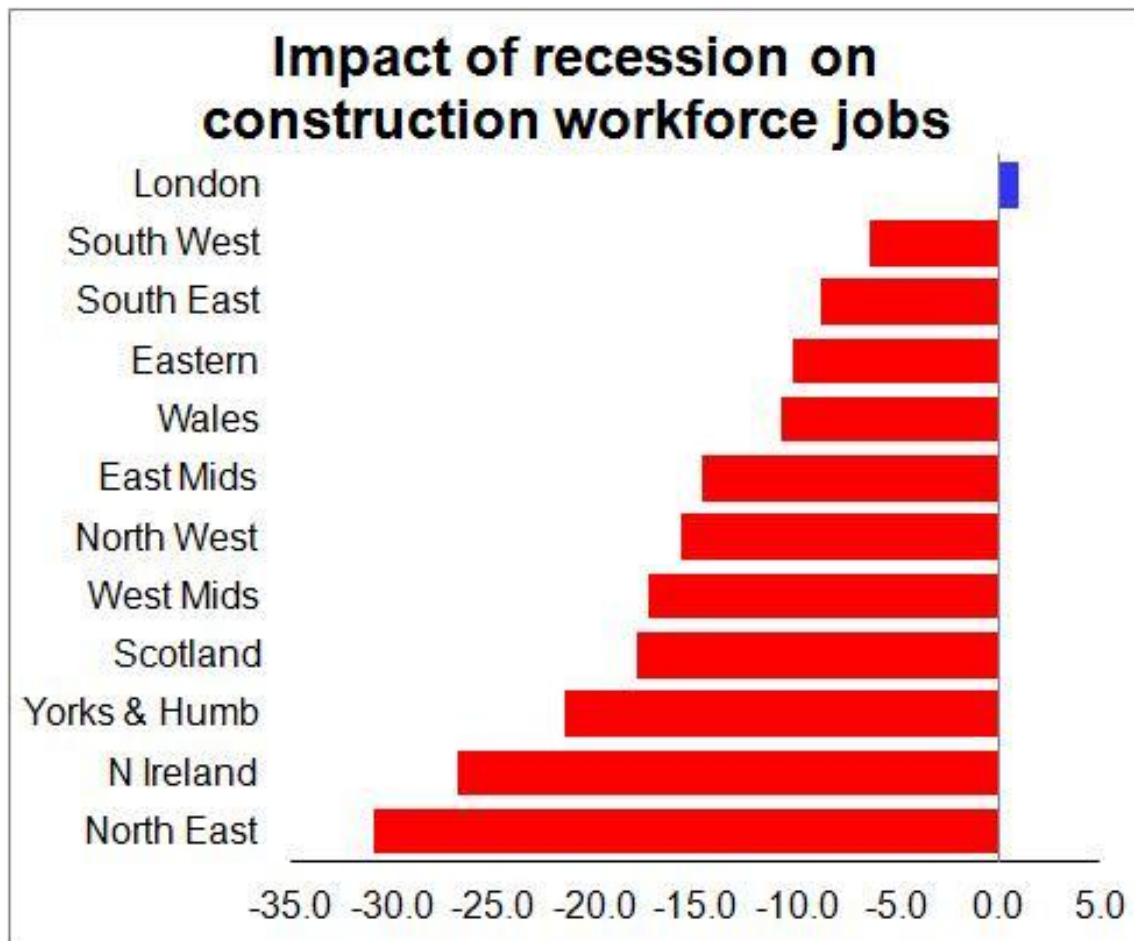
### 5.2.2 Unemployment among construction workers

It is estimated that between September 2008 and March 2011 the construction workforce shrank by 15% in the UK. According to the 2011 Census there were 6,751 Epping Forest District residents working in construction. If the 15% reduction had applied in the district, this suggests that nearly 1,200 residents might have lost their jobs. However, total unemployment in the district is estimated to have risen by only 800 in that period and total claimants by only 836. Detailed examination of the occupations of claimants revealed

increases of only around 100 among a wide range of construction related occupations. This is less than the increase of around 200 in one single occupation (sales and retail assistants).

It seems likely that the district's construction workers benefited from the relative buoyancy of the London construction market. The 2011 Census reveals that construction workers form a greater proportion of the resident workforce in Epping Forest District than they do in any London Borough. Furthermore, it is likely that much of the employment registered in the district is focused on the London market. The relative health of the London market as shown in Figure 15 could therefore be very relevant to Epping Forest District businesses as well as Epping commuters.

Figure 15: Difference in construction workforce jobs (%) between 2007-2012



Source: 'Brickonomics' blog by Brian Green, November 15th, 2012, available at: <http://brickonomics.building.co.uk/2012/11/north-east-aches-while-london-sees-growth-in-construction-jobs/>. Data from the blog sourced from ONS.

### 5.2.3 Unemployment hotspots in Epping Forest District

Eight wards in the district have consistently suffered higher unemployment/ claimant counts than has the district as a whole<sup>9</sup>. In other words, despite the credit crunch and recession, certain patterns of labour market success and failure are remarkably static. As the eight wards account for less than a third of the district's population and account for roughly half of the district's claimants, they are considered to be 'core wards' with regard to unemployment.

The eight wards are:

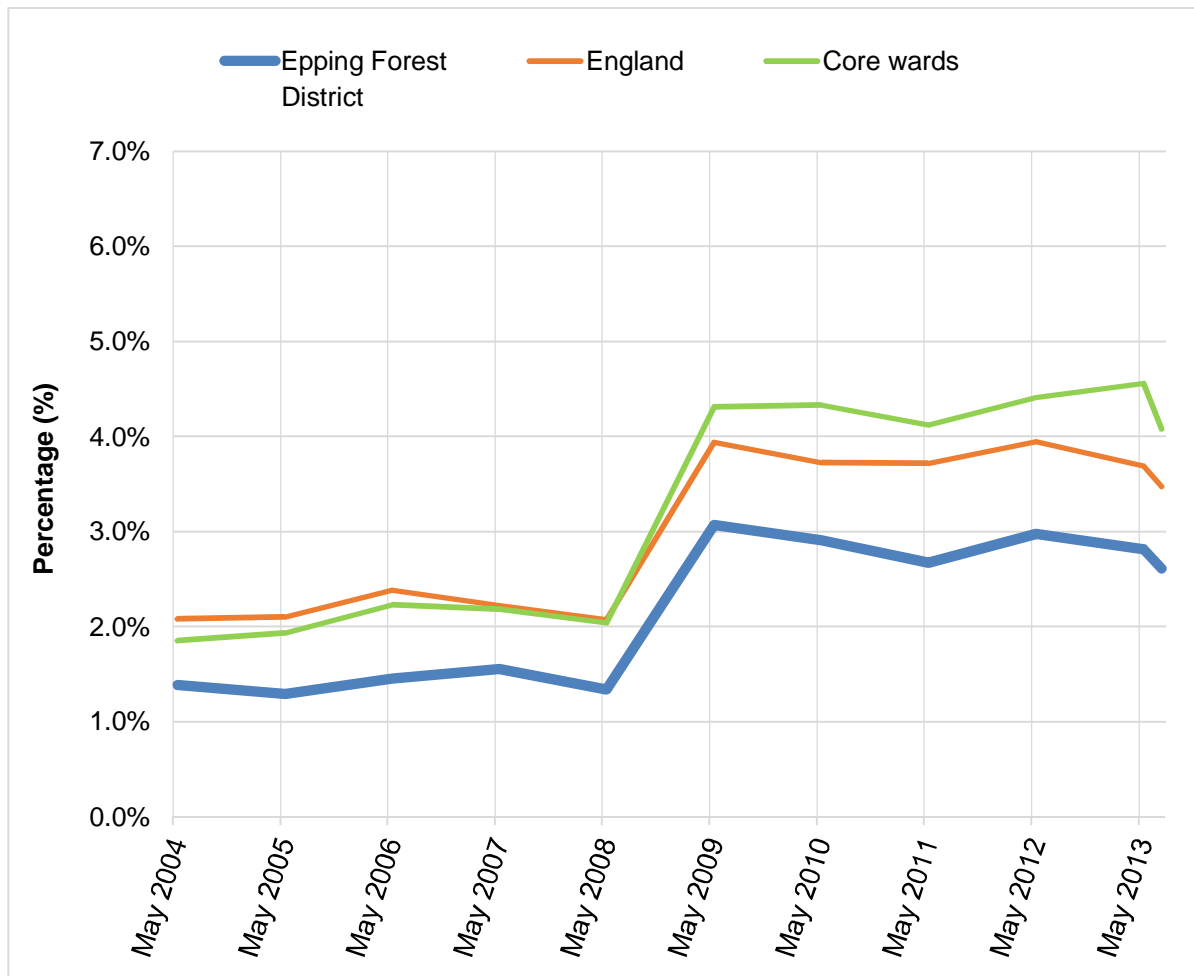
- Waltham Abbey – Paternoster; South West; Honey Lane; and North East);
- Loughton – Broadway; Alderton; and Fairmead) and
- Grange Hill.

**Table 9: Claimant unemployed in hotspot wards, 2005-2013**

Area	May 2005 claimants age 18-64	May 2009 claimants age 18-64	May 2013 claimants age 18-64	July 2013 claimants age 18-64
Waltham Abbey Paternoster	80 (3.0%)	140 (5.3%)	150 (5.7%)	135 (5.1%)
Waltham Abbey South West	45 (1.6%)	125 (4.6%)	135 (4.9%)	110 (4.0%)
Waltham Abbey Honey Lane	80 (2.0%)	150 (3.8%)	155 (3.9%)	135 (3.4%)
Waltham Abbey North East	45 (1.8%)	85 (3.4%)	95 (3.8%)	85 (3.4%)
Loughton Broadway	50 (1.9%)	135 (5.2%)	145 (5.6%)	130 (5.0%)
Loughton Alderton	40 (1.4%)	110 (3.9%)	135 (4.8%)	125 (4.4%)
Loughton Fairmead	55 (2.0%)	140 (5.0%)	130 (4.7%)	120 (4.3%)
Grange Hill	70 (1.8%)	150 (3.8%)	150 (3.8%)	140 (3.5%)
<b>8 core wards</b>	<b>465 (1.9%)</b>	<b>1035 (4.3%)</b>	<b>1095 (4.6%)</b>	<b>980 (4.1%)</b>
<b>Epping Forest District</b>	<b>985 (1.3%)</b>	<b>2335 (3.1%)</b>	<b>2145 (2.8%)</b>	<b>1990 (2.6%)</b>

<sup>9</sup> Looking at the May claimant counts from 2004 to 2013, on no occasion did any of the eight core wards have a claimant count proportion lower than that for the district as a whole. This is irrespective of the denominator used (official claimant count, which is only available for the 16-64 population, or Census 2011). On nearly all dates the proportion in each of the eight wards uncomfortably exceeds that in the district. No other wards come close in these respects, although Loughton Fairmead and Shelley have performed badly in recent years, but not as badly as any of the eight core wards.

Figure 16: Claimant proportions in core wards, Epping Forest District and England

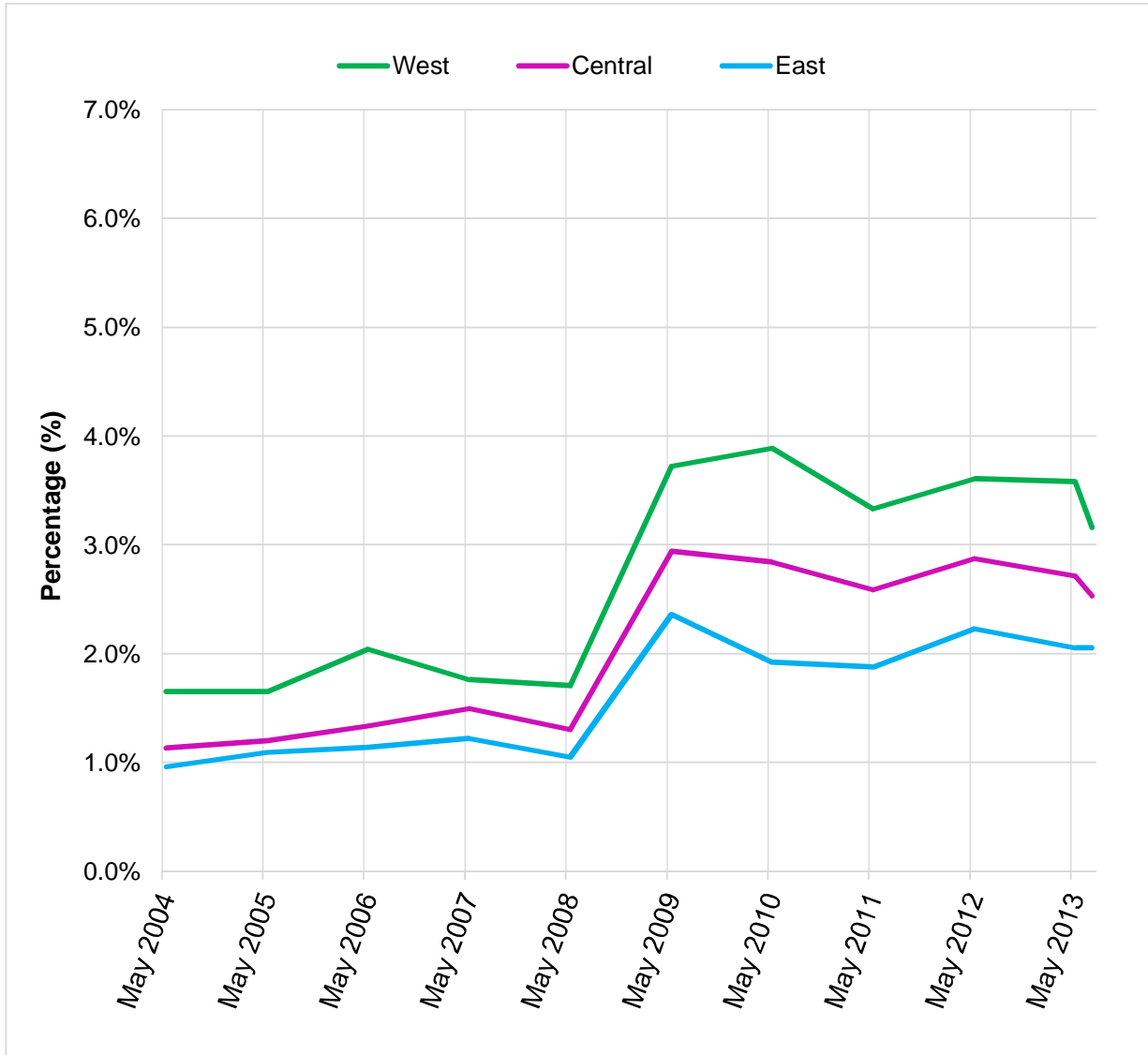


Source: Office for National Statistics/ Nomis. See p 39\*

Figure 16 above shows that the increase in claimant proportions in the eight core wards was slightly higher than in England as a whole and significantly greater than in the district. The core wards taken together, and taking claimants as an indicator, appear now to suffer more from unemployment than the England average.

The division of the district into three corridors (West - largely the Lea Valley; Central - the Central Line axis; and East) suggests that unemployment tends to be more of a problem in the West – see Figure 17 below.

Figure 17: Claimant proportions in three corridors of Epping Forest District



Source: Office for National Statistics, see p 39\*

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