
# City of Wolverhampton

# Strategic Economic Evidence Base

# Appendices: Sector Profiles

# December 2023

The Economic Intelligence Unit

# Contents

## Background and Introduction

Wolverhampton's economy is broken down into the following sectors, some "strategic" (advanced manufacturing, building technologies, business services, environmental technologies, transport technologies and visitor economy) – focused on growth - and some more "foundational" (health & wellbeing, public sector including education and retail / wholesale) – critical to employment but with a more enabling role in the economy.

**Summary of GVA, jobs and enterprises by defined sector[1] for Wolverhampton (and percentage of total for England):**

| | GVA (£m) | | | Jobs | | | Enterprises (Snapshot) | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2021 | % | England % | 2022 | % | England % | 2023 | % | England % |
| Advanced Manufacturing | £974m | 17.6% | 11.3% | 13,670 | 12.5% | 9.9% | 790 | 8.9% | 11.7% |
| Building Technologies | £360m | 6.5% | 6.0% | 4,050 | 3.7% | 4.8% | 1,150 | 13.0% | 13.9% |
| Business Services | £1.3bn | 23.4% | 43.2% | 18,515 | 17.0% | 26.2% | 2,500 | 28.3% | 37.3% |
| Environmental Technologies | £134m | 2.4% | 2.7% | 1,275 | 1.2% | 1.1% | 55 | 0.6% | 0.5% |
| Health & Wellbeing | £882m | 16.0% | 8.4% | 23,400 | 21.4% | 15.1% | 445 | 5.0% | 5.5% |
| Public Sector inc. Education | £920m | 16.7% | 11.7% | 17,000 | 15.6% | 15.2% | 225 | 2.5% | 4.0% |
| Retail | £661m | 12.0% | 10.7% | 17,500 | 16.0% | 14.0% | 1,640 | 18.5% | 14.8% |
| Transport Technologies | £202m | 3.7% | 3.2% | 8,270 | 7.6% | 5.1% | 1,380 | 15.6% | 4.8% |
| Visitor Economy | £97m | 1.8% | 2.8% | 5,550 | 5.1% | 8.5% | 660 | 7.5% | 7.4% |
| **Wolverhampton Total** | **£5.5bn** | | | **109,230** | | | **8,845** | | |

*Source: ONS, Regional gross value added (balanced) by industry: all ITL regions, 2023, ONS, BRES, 2023, ONS, UK Business Counts, 2023*

There are clear industrial strengths and opportunities in the Wolverhampton economy, some expected and traditional, others more recent and unexpected. This report forms part of The Economic Intelligence Unit's Strategic Economic Evidence Base and should be read in conjunction with the full main report. The focus here is on profiles of key sectors in the Wolverhampton economy. Some of the sectors have more information / data than others, due to their size / scale or because recent work is relevant to re-present here as updated.

The remainder of this document profiles each sector in turn. Underpinning datasets are available for all sectors if required for further analysis. All data is sourced from official sources: principally via the Office for National Statistics, specifically: ONS Business Register and Employment Survey via NOMIS (Jobs), ONS Regional Gross Value Added by Industry (GVA) and ONS Business Counts via NOMIS (Businesses).

But also using newer data sources to tell the story of new clusters of the economy, principally through The Data City. In line with the 4 core cluster opportunities highlighted in the main report, an additional sub-section is provided within 4 of the 10 sectors covered, giving insight on these specific opportunities for Wolverhampton: Advanced Manufacturing (Manufacturing and Materials cluster), Building Technologies (Sustainable Construction cluster), Business Services (Services inc. Digital cluster), and Environmental Technologies (Green Economy cluster).

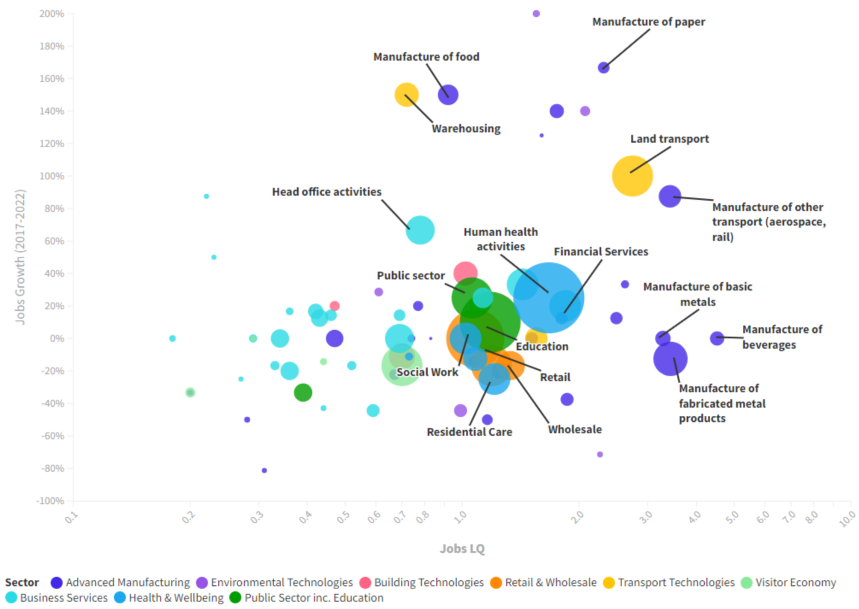
[1] Shaded boxes indicator Wolverhampton has a higher or same proportion that the national proportion for that sector.

## Summary of Findings

Wolverhampton remains reliant on 5 key sectors of employment and output creation: business services, advanced manufacturing, health and wellbeing, retail and wholesale, and the public sector. Within these sectors is where most, but not all, of Wolverhampton's strengths lie, highlighted in the bubble graph[2] below and the individual sector sections throughout this report. Overall, the following activities are where Wolverhampton has particularly strength and specialisation:

- Aerospace and related machinery / supply chains.
- Food and beverages, particularly beer but also the poultry and soft drinks industries.
- Metals and materials supply chains and products, including metal production / treatment, fasteners, locks / hinges, and other fabricated metal products.
- Financial service activities, including mortgages and credit.
- Publishing activities, especially newspapers.
- Specialised construction activities, such as completion and finishing, painting and demolition.
- Waste collection, gas distribution and metals recovery.
- Public sector and education.
- Wholesale of other goods generally linked to manufacturing sectors, such as machine tools, metals and metal ores and waste / scrap.
- The retail sale of a variety of goods including cars, medical goods, and furniture, lighting equipment and other household articles.
- Couriers and freight transport by road.
- Passenger / public transport provision.
- Core health services in hospitals.
- Residential and social care services.

**Growth, Size and Specialisation of Sector Activities in Wolverhampton**




*Source: ONS, Business Register Employment Survey (BRES), 2023*

[2] Size of bubble = size of sector activity by jobs; further to the right indicates Wolverhampton specialisation (location quotient); and further to the top indicates higher growth in jobs in the last 5 years. [Interactive version]

Demonstrated somewhat by the growth aspect of the bubble graph, there are a host of emerging sector opportunities for Wolverhampton, of which some have already demonstrated a high growth in jobs and output. These include activities of existing strength, such as food and drink manufacturing, transport and logistics and some service and digital industries, as well as more new economy clusters.

**Growth Analysis – Latest Yearly Growth**

| | Jobs (2021-2022) | | | GVA (2020-2021) | | |
|---|---|---|---|---|---|---|
| **Sector and Sub-Sector** | **Wton change** | **Wton %** | **England %** | **Wton change** | **Wton %** | **England** |
| Advanced Manufacturing | 1,970 | 16.8% | 3.3% | £154m | 18.8% | 8.1% |
| Building Technologies | -250 | -5.8% | 2.0% | £64m | 21.6% | 13.3% |
| Business Services | 870 | 4.9% | 3.2% | £91m | 7.6% | 4.9% |
| Environmental Technologies | -800 | -38.6% | -1.0% | £17m | 14.5% | 12.2% |
| Health & Wellbeing | 75 | 0.3% | 1.9% | £73m | 9.0% | 6.3% |
| Public Sector inc. Education | 1,100 | 6.9% | 1.1% | £42m | 4.8% | 6.3% |
| Retail & Wholesale | -2,000 | -10.3% | -0.1% | £57m | 9.4% | 8.6% |
| Transport Technologies | 2,865 | 53.0% | 0.8% | £26m | 14.8% | 2.6% |
| Visitor Economy | 100 | 1.8% | 7.5% | £22m | 29.3% | 31.8% |
| **Grand Total** | **3,930** | **3.7%** | **2.3%** | **£549** | **11.0%** | **7.1%** |

*Source: ONS, Regional gross value added (balanced) by industry: all ITL regions, 2023, ONS, BRES, 2023*

With the use of additional datasets, primarily The Data City, this report also identifies several opportunities in these new economy clusters for Wolverhampton. This draws on work already carried out by The Midlands Engine and is also important in relation to Wolverhampton's role in the West Midlands Combined Authority's Plan for Growth – which identifies 8 clusters of focus. Specifically, opportunities for Wolverhampton appear to pertain to:

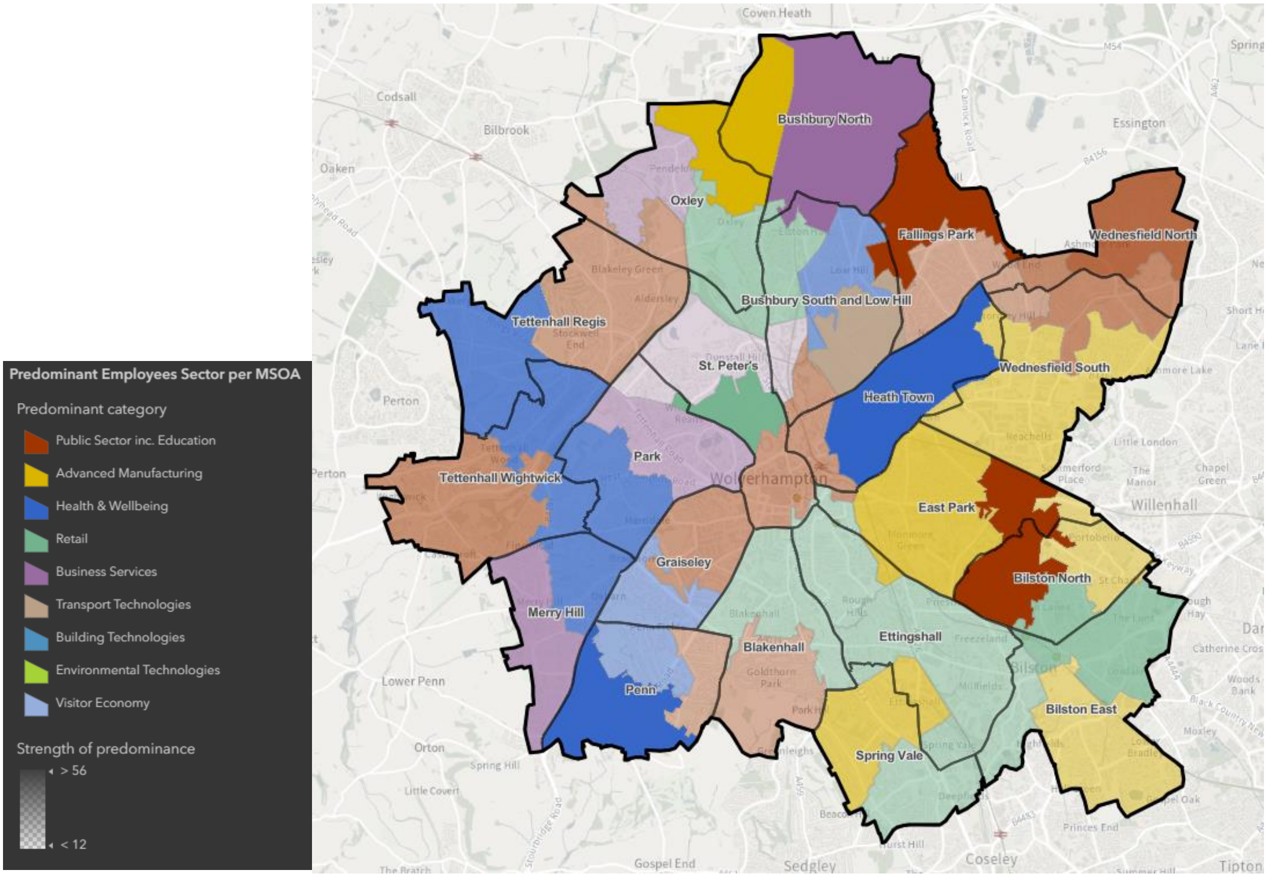
- **Sustainable Construction**
  - Major local opportunities to capitalise on new methods of construction and technologies – for example modular / offsite construction, brownfield land remediation and the integration of digital in building / engineering technologies and also net zero practices, for example circular economy (CE).
- **Manufacturing & Materials**
  - Supporting the transition to net-zero technologies, the integration of digital into manufacturing processes and harnessing advanced materials. Some will be cluster specific changes and some more "functional" – e.g., digital, additive manufacturing, CE.
- **Services (including digital)**
  - Building on existing strengths related to cyber security and data infrastructure, as well as the integration of digital across other service sectors such as financial services (FinTech), Education (EdTech) and Legal services (Legal Tech). Across all is the opportunity for harnessing artificial intelligence and other technology.
- **Green Economy**
  - A combination of green / environmental technologies as a growth opportunity in themselves through circular economy, waste and utilities, as well as the need for all sectors to decarbonise.

While these key opportunities will be important for driving growth in Wolverhampton, sectors in the enabling, “everyday economy” remain crucial to the foundations. Health, public sector, retail and wider services remain major employers locally, and have their own potential productivity gains.

To demonstrate the spatial distribution of sector activity in Wolverhampton, mapping has also been undertaken of the density of sector employment and businesses across the city. An interactive mapping report can be accessed here, with the static map below showing the predominant sectors by employees in different parts of Wolverhampton.

As demonstrated, the health sector is particularly important in the west of the city, while retail / wholesale is concentrated in the south east and centrally. Manufacturing also has prominence in the eat, with other sectors such as transport technologies are scattered throughout the locality as a predominant sector.

**Predominant Employees Sector per small area (Wolverhampton)**




*Source: ONS BRES*

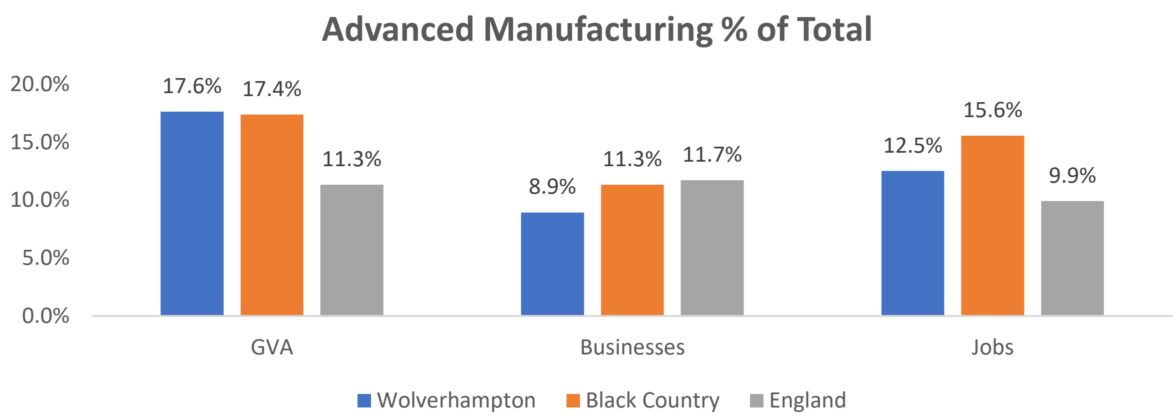
## Advanced Manufacturing and Engineering

### Overall Size

- £974m GVA, 17.6% of total Wolverhampton GVA (£5.5bn)
- 790 businesses, 8.9% of total Wolverhampton businesses (8,845)
- 13,670 jobs, 12.5% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a considerably higher proportion of advanced manufacturing jobs and GVA compared to the national average (12.5% of the local total jobs compared to 9.9% nationally, and 17.6% vs 11.3% for GVA).
- Wolverhampton has a lower proportion of manufacturing businesses than the England average (8.9% compared to 11.7%).




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Sub-Sector Concentration

Analysis of sub-sectors demonstrates Wolverhampton's strength in manufacturing and compared to the national average, especially in particular activities: metals & materials, transport manufacturing (aerospace and aspects of automotive) and food & drink in particular, but also "wider" advanced manufacturing activities. Transport manufacturing drives high productivity in the sector.

**Summary Data: Wolverhampton Advanced Manufacturing sub-sectors**

| | GVA (£m) | Jobs | Businesses | GVA per employee |
|---|---|---|---|---|
| **Advanced Manufacturing** | **£974** | **13,670** | **790** | **£71,251** |
| Agriculture & Agri-Tech | | 5 | 10 | |
| Food & Drink Manufacturing | £43 | 1,850 | 40 | £23,243 |
| Metals & Materials | £337 | 5,150 | 265 | £65,437 |
| Transport Manufacturing | £343 | *2,500* | *20* | £137,200 |
| *Automotive* | | *100* | *15* | |
| *Rail and Aerospace* | | *1,500* | *5* | |
| Wider Advanced Manufacturing | £251 | 5,065 | 455 | £49,556 |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

**Advanced Manufacturing Sub-Sectors: Share of Economy Totals in Wolverhampton and England**

| | GVA | | Jobs | | Businesses | |
|---|---|---|---|---|---|---|
| | W'ton | England | W'ton | England | W'ton | England |
| Agriculture & Agri-Tech | 0.0% | 0.8% | 0.0% | 0.6% | 0.1% | 3.9% |
| Food & Drink Manufacturing | 0.8% | 1.2% | 1.7% | 1.4% | 0.5% | 0.4% |
| Metals & Materials | 6.1% | 3.4% | 4.7% | 1.9% | 3.0% | 1.3% |
| Transport Manufacturing | 6.2% | 2.1% | 1.5% | 0.9% | 0.2% | 0.2% |
| *Automotive* | | | 0.1% | 0.5% | 0.2% | 0.1% |
| *Rail and Aerospace* | | | 1.4% | 0.4% | 0.1% | 0.1% |
| Wider Advanced Manufacturing | 4.5% | 3.8% | 4.6% | 5.2% | 5.1% | 5.9% |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

*Note that full sub-sector granularity is not available for automotive & rail / aerospace, hence missing data and use of the broader "Transport Manufacturing". Automotive is also underreported on in the official statistics, not least due to Jaguar Land Rover sitting outside of the Wolverhampton boundary. Some automotive jobs will also be "hidden" within the Metals and Materials sub-sector definition.*

*In addition, aerospace is not well defined using SIC codes; analysis by Midlands Aerospace Alliance and Midlands Engine Observatory suggest over 2,000 jobs in aerospace in Wolverhampton and 17 businesses. These are likely to be in the above data but defined in the Metals and Materials sub-sector.*

## Location Quotients

Location quotients (LQ) are a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region "unique" in comparison to the national average. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case nationwide.

Applying location quotients to all industries in Wolverhampton provides the following results for advanced manufacturing and engineering.

For GVA and jobs, advanced manufacturing and engineering overall has an LQ of higher than 1, suggesting greater concentration than the national average. For businesses the figure is slightly lower.

- Jobs: 1.26, below Black Country wide figure of 1.57
- GVA: 1.56, above Black Country wide figure of 1.53
- Businesses: 0.76, below Black Country wide figure of 0.97

The following sub-sectors also have LQs higher than 1:

- Automotive: 1.28 (businesses),
- Food and Drink Manufacturing: 1.06 (businesses), 1.24 (jobs), 1.8 (GVA)
- Metals and Materials: 2.38 (businesses), 2.46 (jobs), 2.94 (GVA)
- Rail and Aerospace: 3.42 (jobs)
- Transport Manufacturing: 1.18 (GVA)
- Wider Advanced Manufacturing: 1.09 (GVA)

Looking deeper into the jobs and businesses data allows analysis of specific manufacturing activities that Wolverhampton has strength. This confirms that the following are areas of high concentration in Wolverhampton:

### Wolverhampton Advanced Manufacturing: High LQ Activities

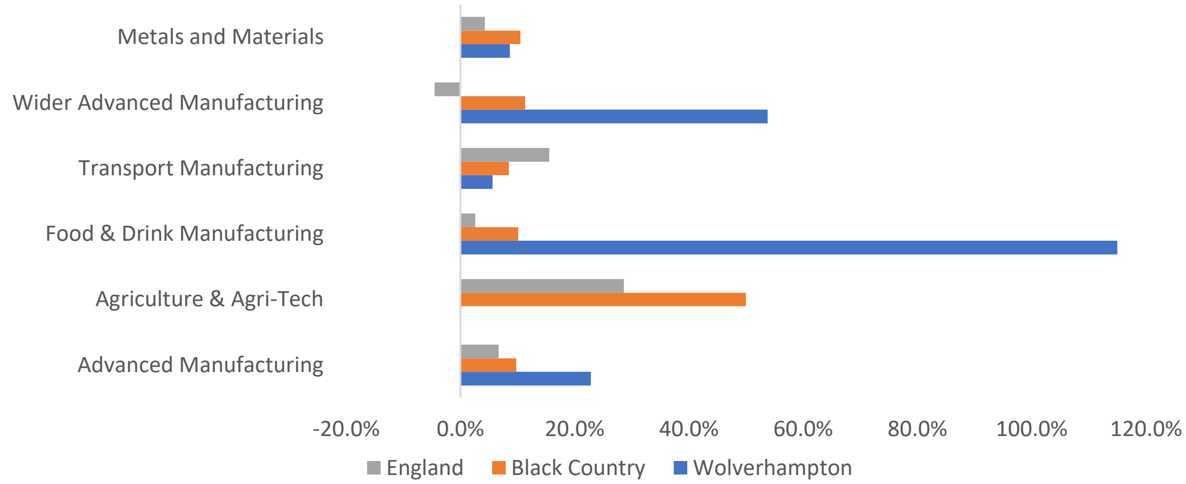
| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 15: Manufacture of leather and related products | 1,500 | 13.08 |
| 24: Manufacture of basic metals | 7,000 | 8.06 |
| 25: Manufacture of fabricated metal products, except machinery and equipment | 18,000 | 4.32 |
| 14: Manufacture of wearing apparel | 800 | 2.57 |
| 19: Manufacture of coke and refined petroleum products | 250 | 2.54 |
| 31: Manufacture of furniture | 3,000 | 2.47 |
| 23: Manufacture of other non-metallic mineral products | 3,000 | 2.15 |
| 28: Manufacture of machinery and equipment n.e.c. | 5,000 | 1.92 |
| 17: Manufacture of paper and paper products | 1,250 | 1.77 |
| 16: Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials | 2,000 | 1.74 |
| ***5 Digit SIC Level*** | | |
| 24440: Copper production | 250 | 49.89 |
| 24310: Cold drawing of bars | 50 | 31.18 |
| 25940: Manufacture of fasteners and screw machine products | 600 | 29.94 |
| 23650: Manufacture of fibre cement | 40 | 24.95 |
| 23690: Manufacture of other articles of concrete, plaster and cement | 150 | 24.95 |
| 23310: Manufacture of ceramic tiles and flags | 50 | 15.59 |
| 20110: Manufacture of industrial gases | 150 | 14.97 |
| 10611: Grain milling | 200 | 11.09 |
| 25610: Treatment and coating of metals | 800 | 11.09 |
| 11050: Manufacture of beer | 600 | 10.69 |
| 13300: Finishing of textiles | 300 | 10.69 |
| 23640: Manufacture of mortars | 20 | 9.98 |
| 24540: Casting of other non-ferrous metals | 75 | 9.36 |
| 25500: Forging, pressing, stamping and roll-forming of metal; powder metallurgy | 450 | 8.64 |

*Source: ONS, BRES, 2023*

### Growth

- Between 2015 and 2021, advanced manufacturing and engineering GVA in Wolverhampton grew by 31.4%, higher than that of the Black Country and England overall (+11.1% and +13.0% respectively). This growth was higher than overall GVA growth seen across Wolverhampton's economy in this time period (+30.7%).
- More recently, since 2017 GVA has grown by 22.8% in this sector, compared to +9.8% and +6.7% in the Black Country and England respectively. Growth was strongest in the food and drink sub-sector (+115.0%), followed by wider advanced manufacturing (+53.8%), metals and materials (+8.7%) and transport manufacturing (+5.6%).

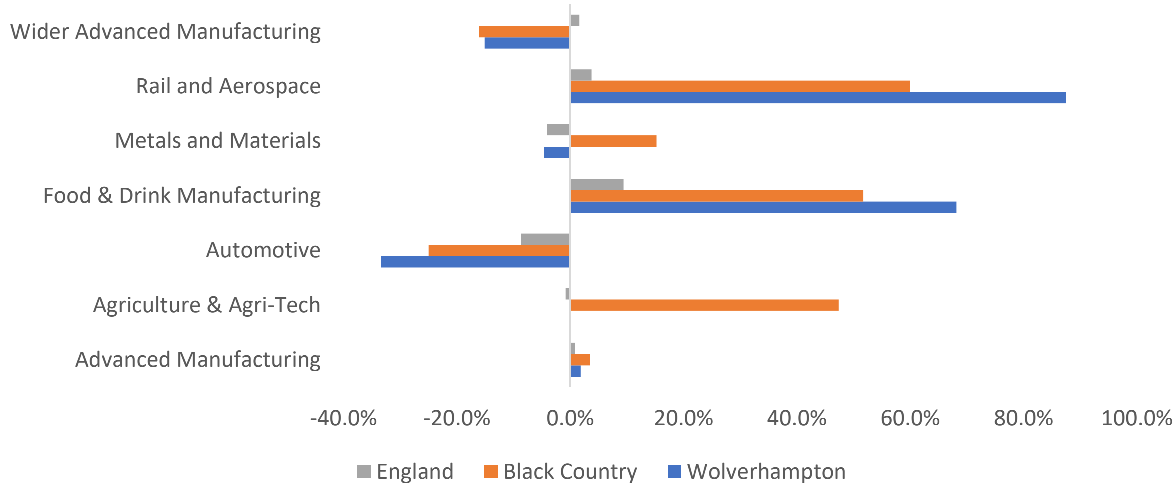
## GVA Growth by Sub-Sector (2017-2021)



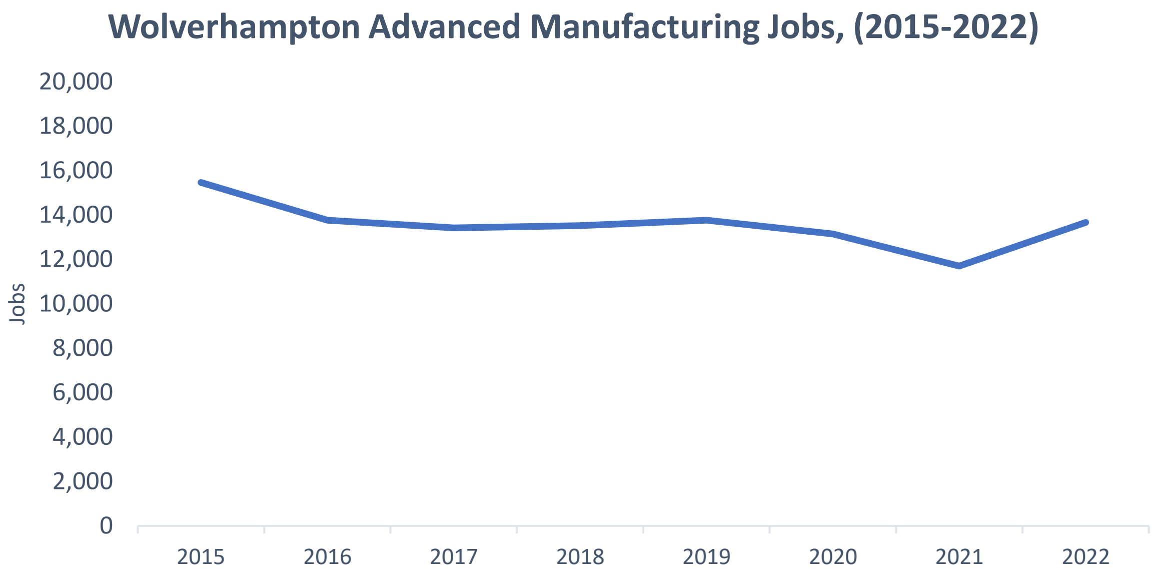

*Source: ONS, Regional gross value added (balanced) by industry, 2023*

- In contrast, there were fewer manufacturing jobs in 2022 than in 2015. The number of sector employees in Wolverhampton fell by 11.6% in this period, whereas the national average increase was +1.5%.
- More recently, since 2017 there has been a small growth in manufacturing jobs, at +1.9%, compared to +0.9% in England. Growth was varied amongst the sectors, with automotive (-33.3%), wider advanced manufacturing (-15.1%) and metals and materials (-4.6%) seeing decreases, yet rail and aerospace (+87.5%) and food and drink manufacturing (+68.2%) reporting large increases. Agriculture and agri-tech remained unchanged during this period.
- There was a good recovery in manufacturing jobs in 2022, returning to above pre-pandemic levels, following a drop in 2021.

## Jobs Growth by Sub-Sector (2017-2022)




*Source: ONS, BRES, 2023*




*Source: ONS, BRES, 2023*

### Strategic Companies

Key strategic companies outlined in the following maps / report and also through information held by City of Wolverhampton Council and the EIU.

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Jaguar Land Rover
- Mueller Europe
- Tarmac Building Products
- Acenta Steel
- Flint CPS Inks UK Ltd
- Tata Steel
- Eurofins
- Moog
- UTC / Collins Aerospace
- Marston's PLC
- Salisbury Poultry
- Eurofins Food Testing UK Ltd

And **high growth firms**, including:

- Cooper Coated Coil
- Fortress Interlocks
- Fastline Steel Services
- Onboard Corrugated
- Zaun Limited
- Sherwood Stainless and Aluminium

### Cluster Analysis and Future Potential

The analysis so far suggests a range of manufacturing strengths in Wolverhampton, including:

- Aerospace and related machinery / supply chains.
- Food and beverages, particularly beer but also the poultry and soft drinks industries

- Metals and materials supply chains and products, including metal production / treatment, fasteners, locks / hinges, and other fabricated metal products; feeding into wider sectors such as automotive, aerospace and rail.
- Products related to the construction industry (fibre cement, handling equipment, taps)
- Other niches such as textiles, leather and furniture products.

Manufacturing is a critical local sector, and a key enabler of economic activity and "feed in" to other sectors like construction and logistics. Across sub-sectors there are large transitions related to net zero (e.g., electric vehicles) that will have impacts throughout supply chains. This will be important for the future of Wolverhampton's manufacturing economy and the contribution it makes in terms of jobs, businesses and output; it represents a challenge but also an opportunity for Wolverhampton to continue specialising in manufacturing.

The future strength of manufacturing in Wolverhampton is therefore grounded on building on current strengths and supporting the transition to net-zero technologies, the integration of digital into manufacturing processes and harnessing advanced materials. Some will be cluster specific changes and some more "functional" – e.g., digital, additive manufacturing, circular economy principles.

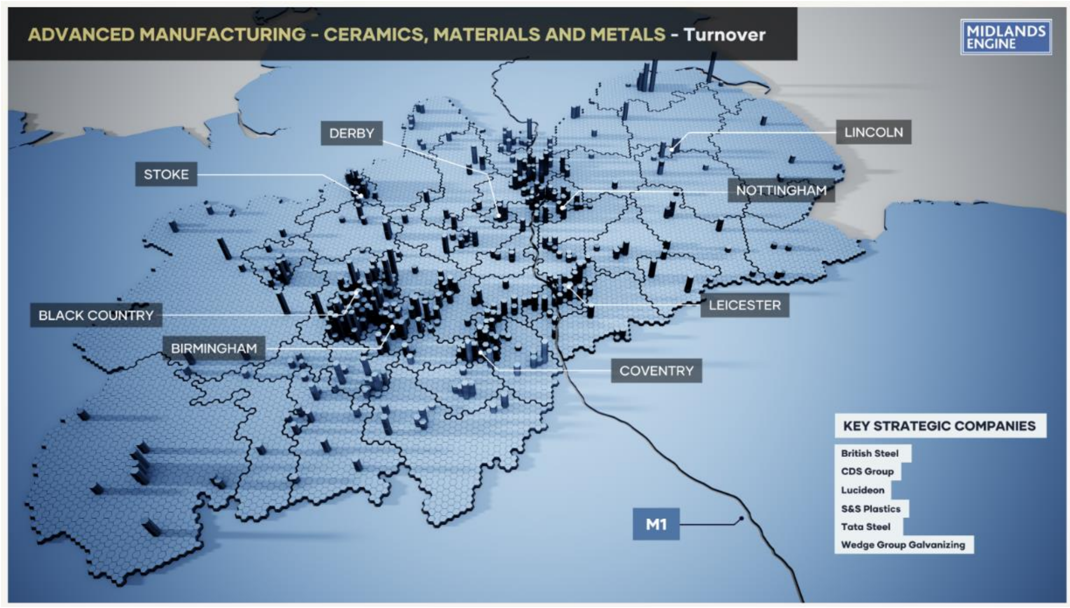
**Wolverhampton Manufacturing Sub-Sectors**

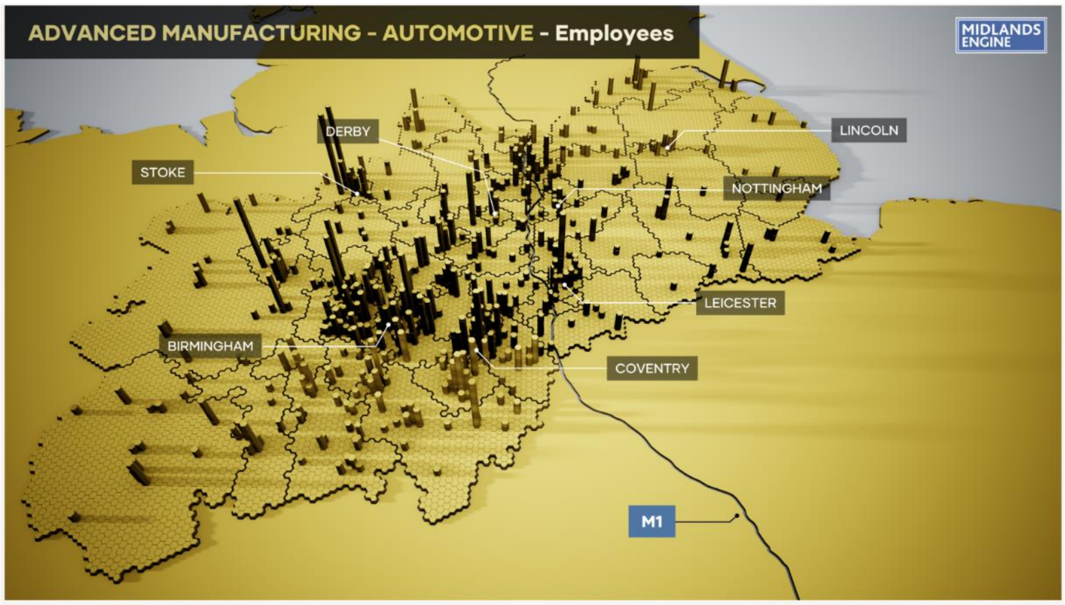
| Key Manufacturing Sub-Sector | Key Wolverhampton Businesses | Opportunities |
|---|---|---|
| Automotive | JLR, Fablink | Electric vehicles, Connected and Autonomous Vehicles (CAV), lightweighting |
| Aerospace | Moog, Collins | Sustainable aviation fuel (SAF), lightweighting, electrification, hydrogen, space |
| Rail | Alstom | Light rail, electrification, hydrogen, digital |
| Food & Drink | Marston's, Salisbury Poultry | Automation, sensors, packaging, circular economy |
| Textiles / Furniture | Sharps, Utopia Furniture | Decarbonisation, digital, healthcare, modular |
| Metals & Materials | Tarmac, Tata Steel, Mueller Europe | Advanced materials, composites, ceramics, new building materials (e.g., offsite) |

Additionally:

- Advanced Manufacturing and Advanced Materials are identified by The Data City as two of the most important emerging sectors in Wolverhampton in terms of employee and business count concentration.
- **Forging, prototyping, coating tech, digital design and computer-aided design (CAD)** are identified as having particular specialisation in Wolverhampton.
- Wolverhampton ranks in the top 5 of local authority areas in the Midlands for **aerospace, automotive and food & drink strengths** (based on employees) in the Midlands Engine clusters project[3] – which highlights it as an opportunity area due to this and supporting ecosystem.

[3] See https://midlandsengine.org/wp-content/uploads/2023/08/ME-Cluster-Snapshot-AUTOMOTIVE.pdf, https://midlandsengine.org/wp-content/uploads/2023/08/ME-Cluster-Snapshot-CERAMICS-METALS.pdf, https://midlandsengine.org/wp-content/uploads/2023/09/ME-Cluster-Snapshot-Food-And-Drink.pdf and https://midlandsengine.org/wp-content/uploads/2023/06/Midlands-Engine-Cluster-Snapshot-Aerospace.pdf




*Source: Midlands Engine*

### Recent Sector Intelligence and Further Insight

| KEY INSIGHTS |
| --- |
| • Manufacturers have generally been in a good place order wise this year but are still struggling with structural issues related to costs, skills shortages and the global trading environment.<br>• Manufacturers reported that output volumes fell in the three months to November 2023, disappointing expectations for expansion, according to the CBI's latest Industrial Trends Survey. A more subdued outlook for production comes as order books fell to their weakest level since the second COVID-19 lockdown in early 2021. Both total and export order books were reported as below normal in November, to the greatest extent since January and February 2021 respectively.<br>• Despite the national figures suggesting a more challenging Q3 for manufacturing, MakeUK's latest Outlook report shows output and orders remain strong in the West Midlands with an order balance of +55% and an output balance of +36% (both the highest of all regions in the UK). Looking forward, both of these are set to increase further in the next quarter with orders at +32% and output at +41%.<br>• Also positive for Wolverhampton and the wider West Midlands, UK car manufacturing has recovered well this year. It rose by almost 40 per cent in September, according to the latest figures, representing the strongest month of growth in 2023. The Society of Motor Manufacturers and Traders (SMMT) said that 88,230 vehicles left British factory lines during the ninth month of the year, an uplift of 39.8 per cent and the best September since 2020.<br>• Furthermore, industry has generally welcomed recent announcements by government to support the sector; for example through its new Advanced Manufacturing Plan and Battery Strategy but also directly through the full expensing and skills / apprenticeships policies announced in the Autumn Statement. |

**Annex: Sector and Sub-Sector Definition**

| SIC Codes | Sector | Sub-Sector |
| --- | --- | --- |
| **01-03** | Advanced Manufacturing & Engineering | Agriculture & Agri-Tech |
| **10-12** | Advanced Manufacturing & Engineering | Food & Drink Manufacturing |
| **22-25** | Advanced Manufacturing & Engineering | Metals & Materials |
| **29** | Advanced Manufacturing & Engineering | Automotive |
| **30** | Advanced Manufacturing & Engineering | Rail and Aerospace |
| **05-09, 13-21, 26-28, 31-33, 71** | Advanced Manufacturing & Engineering | Wider Advanced Manufacturing |

*Data at these levels is not available for all indicators, therefore definitions can be slightly different across indicators (particularly for GVA)*

*A full list of SIC codes and descriptions is available here:*
*https://resources.companieshouse.gov.uk/sic/*

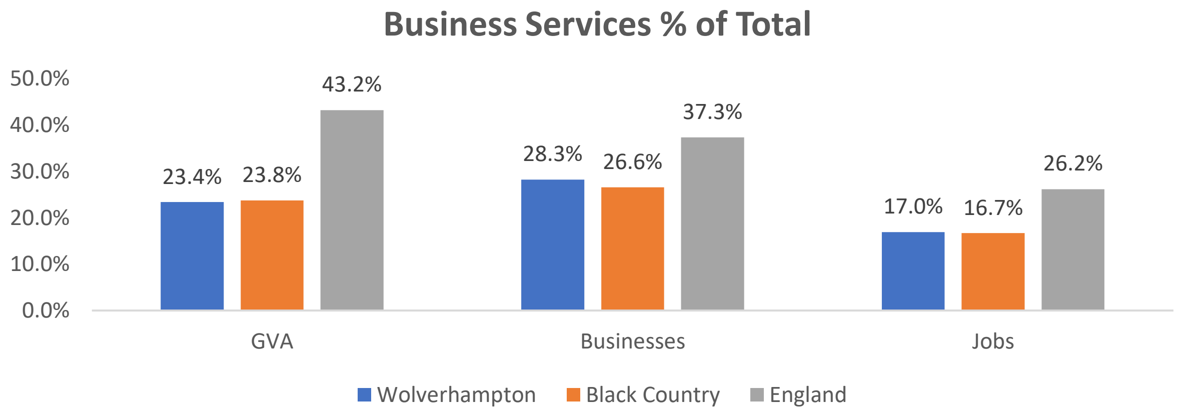
# Business Services

## Overall Size

- £1.3bn GVA, 23.4% of total Wolverhampton GVA (£5.5bn)
- 2,500 businesses, 28.3% of total Wolverhampton businesses (8,845)
- 18,515 jobs, 17.0% of total Wolverhampton jobs (109,230)

## Local / National Comparison

- Wolverhampton has a considerably lower proportion of business services GVA compared to the national average (23.4% of the local total GVA compared to 43.2% nationally), but the sector is more productive than the Wolverhampton total average.
- Wolverhampton has a lower proportion of business services businesses than the England average (28.3% compared to 37.3%).
- Wolverhampton has a lower proportion of business services jobs compared to the national average (17.0% of the local total jobs compared to 26.2% nationally), but the sector is a considerable employer locally.




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

## Sub-Sector Concentration

| | GVA (£m) | Jobs | Businesses | GVA per employee |
|---|---|---|---|---|
| **Business Services** | **£1,291** | **18,515** | **2,500** | **£69,727** |
| Creative | £26 | 425 | 50 | £61,176 |
| Digital / IT | £101 | 1,325 | 290 | £76,226 |
| Financial Services | £307 | 3,775 | 145 | £81,325 |
| Legal and Accounting | £40 | 1,000 | 120 | £40,000 |
| Other Service Activities | £178 | 5,590 | 755 | £31,843 |
| Real Estate and Associated Consultancy | £572 | 3,000 | 315 | £190,667 |
| Support Services | £67 | 3,400 | 825 | £19,706 |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

**Business Services Sub-Sectors: Share of Economy Totals in Wolverhampton and England**

| | GVA | | Jobs | | Businesses | |
|---|---|---|---|---|---|---|
| | W'ton | England | W'ton | England | W'ton | England |
| Creative | 0.5% | 1.9% | 0.4% | 1.1% | 0.6% | 1.8% |
| Digital / IT | 1.8% | 5.2% | 1.2% | 3.7% | 3.3% | 5.5% |
| Financial Services | 5.6% | 9.4% | 3.5% | 3.3% | 1.6% | 2.3% |
| Legal and Accounting | 0.7% | 3.0% | 0.9% | 2.6% | 1.4% | 2.8% |
| Other Service Activities | 3.2% | 8.4% | 5.1% | 8.7% | 8.5% | 10.6% |
| Real Estate and Associated Consultancy | 10.4% | 12.9% | 2.7% | 1.9% | 3.6% | 4.3% |
| Support Services | 1.2% | 2.5% | 3.1% | 4.9% | 9.3% | 10.1% |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for business services.

- Jobs: 0.65, above Black Country wide figure of 0.64
- GVA: 0.54, below Black Country wide figure of 0.55
- Businesses: 0.76, above Black Country wide figure of 0.71

The following sub-sectors do have LQs higher than 1 though, suggesting a slight overrepresentation of these activities locally:

- Financial Services: 1.03 (jobs)
- Real Estate and Associated Consultancy: 1.43 (jobs)

Looking deeper into the jobs data allows analysis of specific business services activities that Wolverhampton has strength. This confirms that the following, to some extent, are areas of high concentration in Wolverhampton:

### Wolverhampton Business Services: High LQ Activities

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 64: Financial service activities, except insurance and pension funding | 3,000 | 1.84 |
| 68: Real estate activities | 3,000 | 1.43 |
| 96: Other personal service activities | 1,250 | 1.13 |
| ***5 Digit SIC Level*** | | |
| 64922: Activities of mortgage finance companies | 600 | 33.26 |
| 64921: Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors | 800 | 9.07 |
| 58130: Publishing of newspapers | 200 | 2.49 |
| 82920: Packaging activities | 300 | 2.27 |
| 68320: Management of real estate on a fee or contract basis | 900 | 2.10 |
| 96020: Hairdressing and other beauty treatment | 900 | 1.68 |
| 64303: Activities of venture and development capital companies | 10 | 1.66 |

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| 96030: Funeral and related activities | 150 | 1.63 |
| 68201: Renting and operating of Housing Association real estate | 600 | 1.54 |
| 95220: Repair of household appliances and home and garden equipment | 30 | 1.50 |
| 64191: Banks | 1,500 | 1.40 |
| 59140: Motion picture projection activities | 100 | 1.39 |
| 77110: Renting and leasing of cars and light motor vehicles | 150 | 1.17 |
| 80200: Security systems service activities | 75 | 1.17 |
| 68209: Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c. | 600 | 1.05 |
| 68310: Real estate agencies | 600 | 1.00 |

*Source: ONS, BRES, 2023*

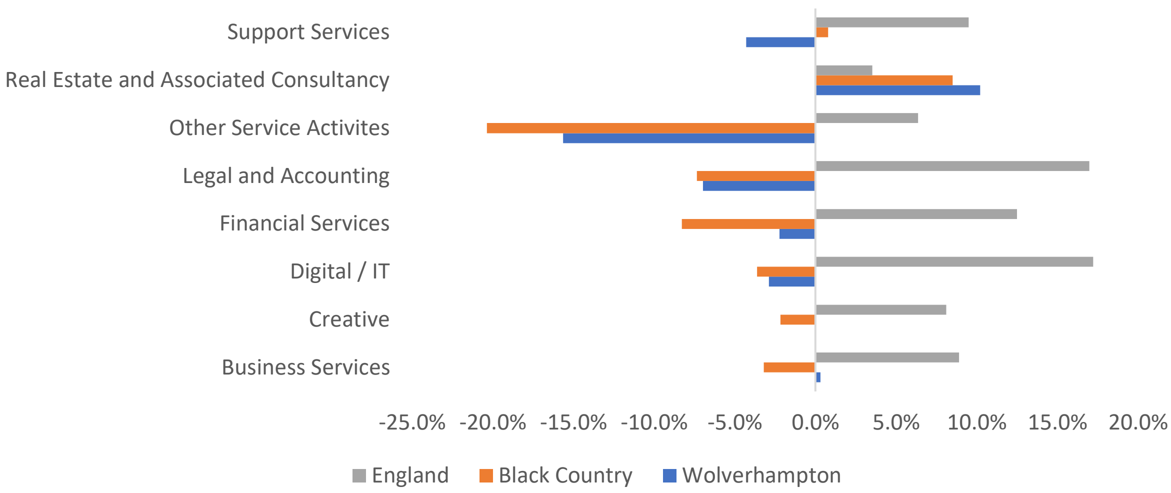
This analysis suggests a range of business services strengths in Wolverhampton, including:

- Financial service activities, including mortgages and credit.
- Real estate activities, especially managing real estate activities.
- Rental and leasing activities, including cars.
- Publishing activities, especially newspapers.
- Security and investigation activities.
- Repair of household appliances and home and garden equipment.
- Other personal service activities including hairdressing and beauty treatments.

### Growth

- Between 2015 and 2021, business services GVA in Wolverhampton grew by 19.3%, higher than that of the Black Country but lower than England (+12.6% and +20.4% respectively). This growth was lower than overall GVA growth seen across Wolverhampton's economy in this time period (+30.7%).
- More recently, since 2017 GVA has grown by 0.3% in this sector, compared to -3.2% and +8.9% in the Black Country and England respectively. Growth was only seen in the Real Estate and Associated Consultancy sub-sector at +10.2%, with all the other sub-sectors seeing a decline over this period.

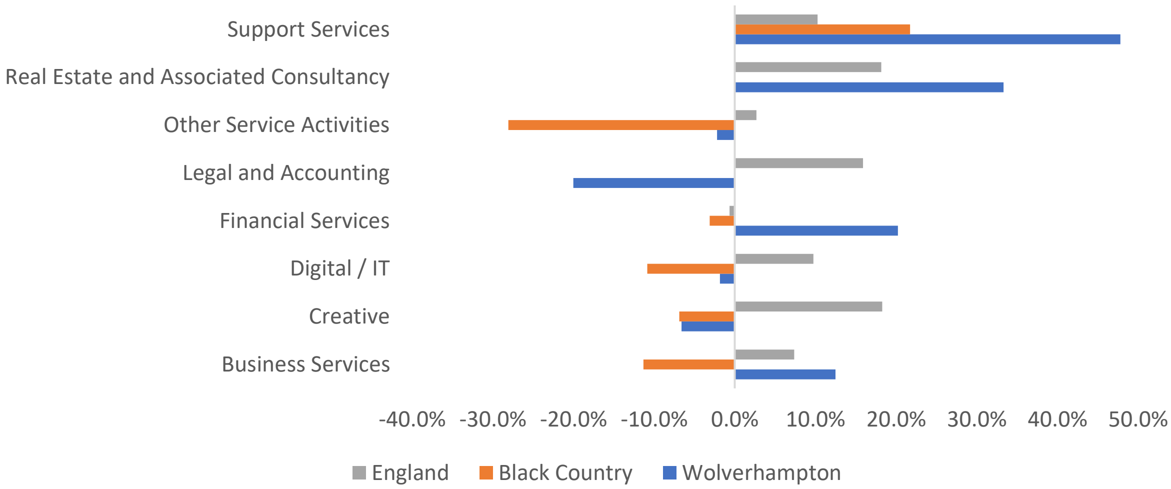
## GVA Growth by Sub-Sector (2017-2021)



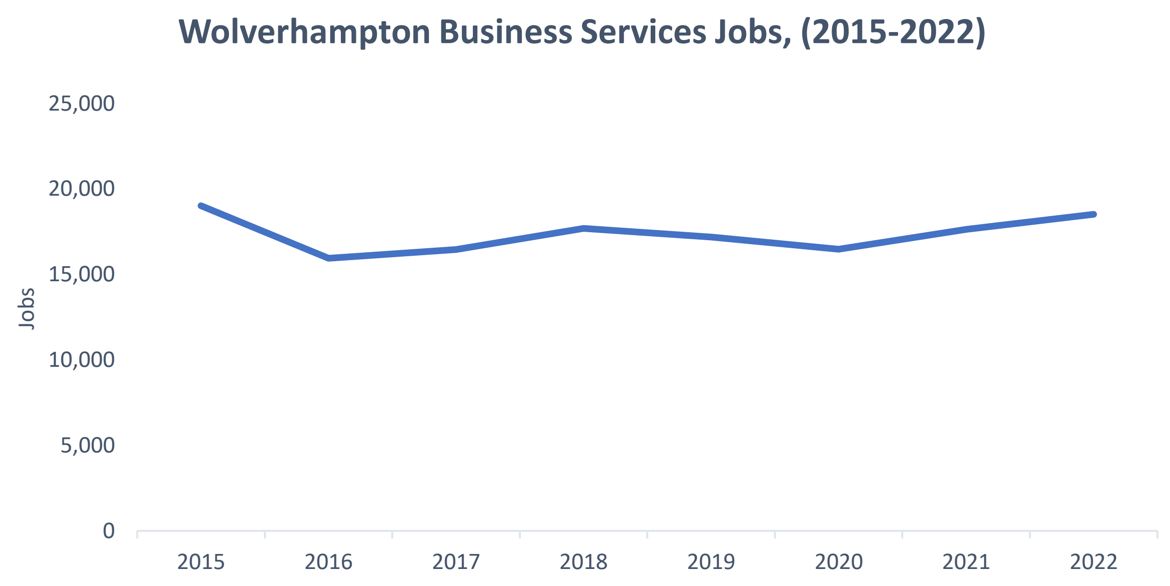

*Source: ONS, Regional gross value added (balanced) by industry, 2023*

- In contrast, there were fewer business services jobs in 2022 than in 2015. The number of sector employees in Wolverhampton fell by 2.7% in this period, whereas the national average increase was +12.0%.
- More recently, since 2017, there has been a growth in business services jobs, at +12.5%, compared to +7.4% in England. Growth was varied amongst the sectors, with support services (+47.8%), real estate and associated consultancy (+33.3%) and financial services (+20.2%) seeing large increases. Legal and accounting declined by 20.0%.

## Jobs Growth by Sub-Sector (2017-2022)




*Source: ONS, BRES, 2023*




*Source: ONS, BRES, 2023*

### Strategic Companies

Key strategic companies outlined in the following maps / report and also through information held by City of Wolverhampton Council and the EIU.

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Charter Court Financial Services
- Middleton Group
- Andrew Sykes Group
- Asset Alliance Group
- Wolverhampton Homes
- Claverley Group
- Exact Mortgage Experts
- Restore Digital
- LGPS Central

And **high growth firms** including:

- Acton Banks
- Yoo Recruit
- Restore Digital
- School of Coding

### Cluster Analysis and Future Potential

The data thus far has highlighted that business services are a key enabler of economic activity in Wolverhampton, with the city having traditional strength in parts of telecoms, financial services, real estate and recruitment / HR activities.

New data-driven technologies are an opportunity across all service-sub-sectors as well as new clusters of their own. Wolverhampton ranks in the top 20% of local authority areas in the Midlands for **disruptive services, cyber and connected devices strengths** (based on employees) in the Midlands Engine clusters project. Key sub-clusters of potential strength in Wolverhampton include:

- **Cyber security / data infrastructure** – with around 40 companies operating locally and employing over 500 people, and key companies such as Atos, Restore Digital, and Goldilock. The latter two have both received investor funding in recent years**.**
- **FinTech –** building on the existence of financial services firms and banks in the city, and FinTech providers like Nochex and Secure Regulated Payments.
- **Other service sectors with digitation potential, such as Education Tech (e.g. the School of Coding), Legal Services (and Legal Tech)** – building on a strong set of legal firms locally, **and Connected Devices / Artificial Intelligence.**

This exploratory data (via The Data City) and company examples are presented in the table below, highlighting the emerging services sector opportunity that Wolverhampton could capitalise on and grow:

| Potential Sub-Sector Opportunity | Estimated Jobs | *Estimated Businesses* | Key Businesses |
|---|---|---|---|
| **Disruptive Technology All** | 500-1,000 | *<100* | Charter Savings Bank, Nochex, Swoopos |
| **FinTech *(Data City defined RTIC)*** | <100 | *<10* | Nochex, Secure Regulated Payments |
| **Cyber *(Data City defined RTIC)*** | 300-400 | *18* | Goldilock, Atos |
| **Education Technology** | <100 | *<10* | School of Coding, Concero |
| **Connected Devices** | <100 | *<10* | Atos |
| **Legal Services** | As per previous section on SIC code analysis | *As per previous section on SIC code analysis* | Thornes Legal, Talbots Law, FBC Manby Bowler, Underhill Langley Wright |
| **Data Infrastructure** | 100-200 | *22* | Restore Digital, Ascentas Group,, Access Group (Oosha), Walkwel Tech, Tecman |

*Source: The DataCity, 2023*

### Recent Sector Intelligence and Further Insight

| KEY INSIGHTS |
|---|
| • There is a lack of workers with the right skills to make them employable in the creative industries; this is considered a mismatch rather than a shortage.<br>• Talent attraction continues to be a significant challenge across all service sectors, not least in legal / accounting and financial services.<br>• In November, the Preliminary UK Services Business Activity Index jumped to a four-month high of 50.5 in November, as against a 49.5 final print for October and the 49.5 market consensus.<br>• TechUK recently launched the 2023 Local Digital Index. Comments about the West Midlands region were as follows: The region scores well overall, featuring 4th in the Index. Each area within the region has its own strength and drawback. The West Midlands CA area has strong digital infrastructure scores with gigabit broadband at over 88% coverage and 5G coverage over 95%. Both are well above the other regional partners scores in the West Midlands. But the West |

| KEY INSIGHTS |
| --- |
| Midlands CA area should look to improve finance and investment coming into the region, especially VC funding and harnessing digital skills in the area to take on the roles of the future. |

## Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
| --- | --- | --- |
| **58-63** | Business Services | Creative & Digital |
| **64-66** | Business Services | Financial Services |
| **69** | Business Services | Legal and Accounting |
| **72-74, 77-80, 94-99** | Business Services | Other Service Activities |
| **68** | Business Services | Real Estate and Associated Consultancy |
| **70 & 82** | Business Services | Support Services |

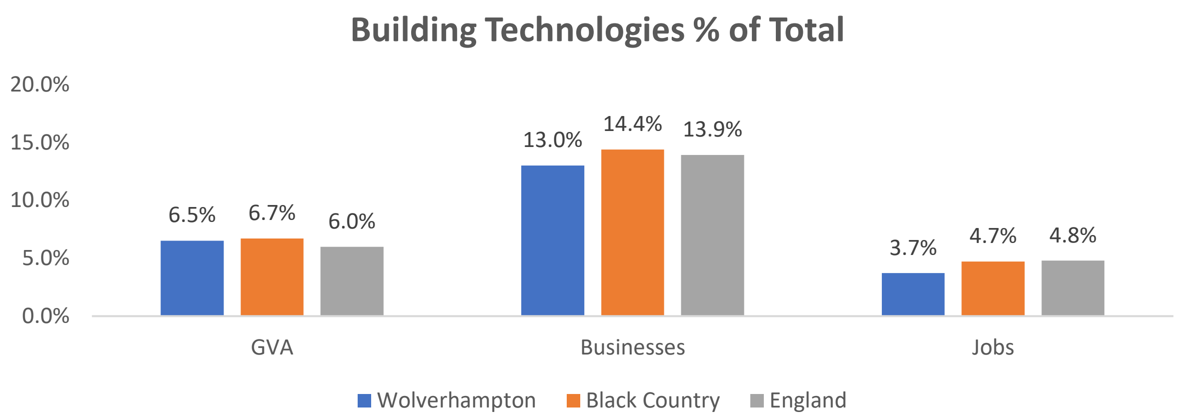
# Building Technologies (Construction)

### Overall Size

- £360m GVA, 6.5% of total Wolverhampton GVA (£5.5bn)
- 1,150 businesses, 13.0% of total Wolverhampton businesses (8,845)
- 4,050 jobs, 3.7% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a higher proportion of building technologies GVA compared to the national average (6.5% of the local total GVA compared to 6.0%).
- Wolverhampton has a lower proportion of building technologies businesses than the national average (13.0% compared to 13.9%).
- Wolverhampton has a lower proportion of building technologies jobs compared to the national average (3.7% of the local total jobs compared to 4.8% across England).




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for building technologies.

- Jobs: 0.77, below Black Country wide figure of 0.99
- GVA: 1.09, below Black Country wide figure of 1.12 but above the national level (1), suggesting slight local specialisation.
- Businesses: 0.93, below Black Country wide figure of 1.03

Looking deeper into the jobs data allows analysis of specific building technologies activities that Wolverhampton has strength in. This confirms that the following (in green) are areas of high concentration in Wolverhampton:

**Wolverhampton Building Technologies: High LQ Activities**

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 41: Construction of buildings | 1,750 | 1.02 |
| ***5 Digit SIC Level*** | | |
| 43390: Other building completion and finishing | 450 | 1.81 |
| 43341: Painting | 150 | 1.29 |
| 41201: Construction of commercial buildings | 450 | 1.28 |
| 43110: Demolition | 20 | 1.11 |
| 41202: Construction of domestic buildings | 1,000 | 1.01 |

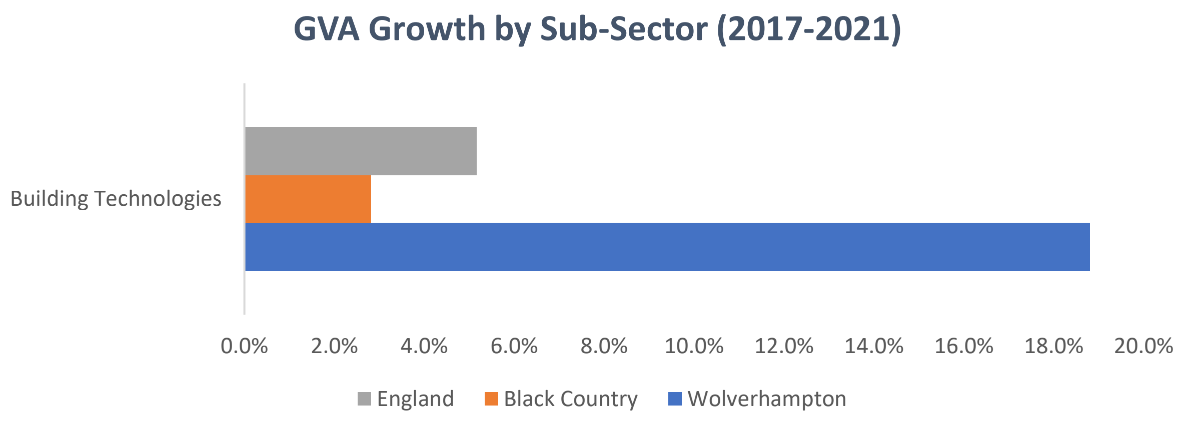
*Source: ONS, BRES, 2023*

This analysis suggests several specific building technologies strengths in Wolverhampton, including:

- Specialised construction activities, such as building completion and finishing, painting and demolition.
- Construction of domestic and commercial buildings.

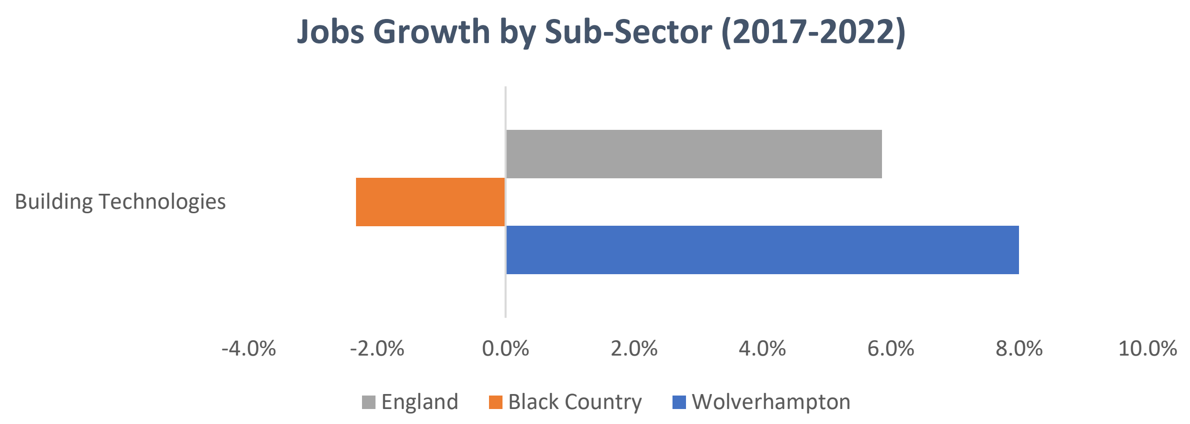
### Growth

- Between 2015 and 2021, building technologies GVA in Wolverhampton grew by 10.8%, lower than that of the Black Country and England (+11.2% and +15.8% respectively). This growth was lower than overall GVA growth seen across Wolverhampton's economy in this time period (+30.7%).
- More recently, since 2017 GVA has grown by 18.8% in this sector, compared to +2.8% and +5.2% in the Black Country and England respectively.

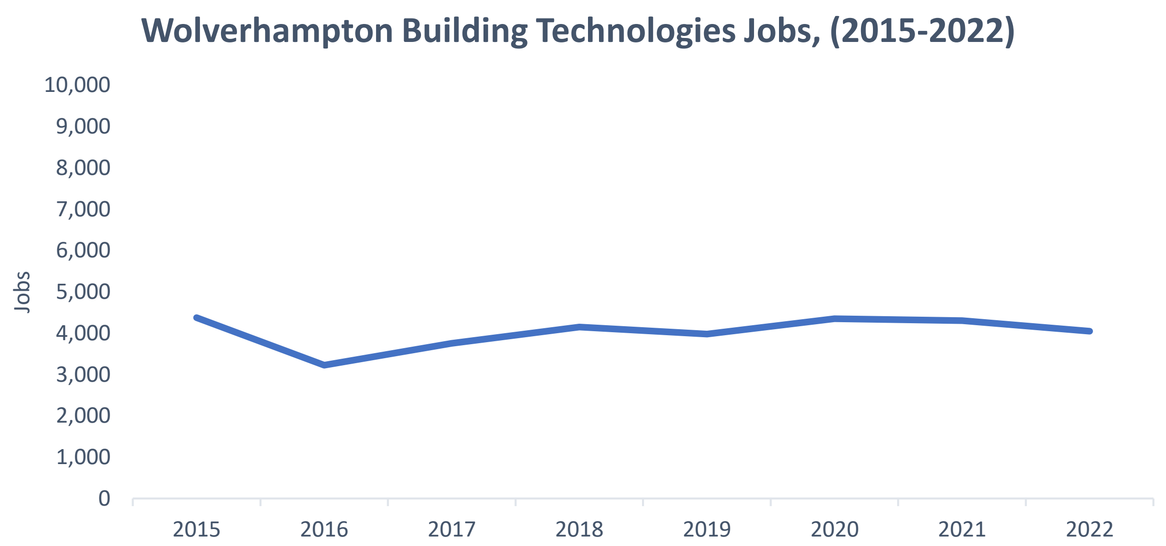



*Source: ONS, Regional gross value added (balanced) by industry, 2023*

- In contrast, there were fewer building technologies jobs in 2022 than in 2015. The number of sector employees in Wolverhampton fell by 7.4% in this period, whereas the national average increase was +15.8%.
- More recently, since 2017, there has been a growth in building technologies jobs, at +8.0%, compared to +5.9% in England, but in the last year jobs fell in Wolverhampton and increased nationally (-5.8% vs 2.0%), reflecting difficult local conditions in the market.




*Source: ONS, BRES, 2023*




*Source: ONS, BRES, 2023*

**Strategic Companies**

Key strategic companies outlined in the following maps / report and also through information held by City of Wolverhampton Council and the EIU.

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Bromford Housing Group
- Carver
- Countryside Partnerships
- Wulfrun Building Solutions
- Midwest Mechanical and Electrical Services
- William Gough & Sons
- RSK Adas
- Wintech

And **high growth firms** including:

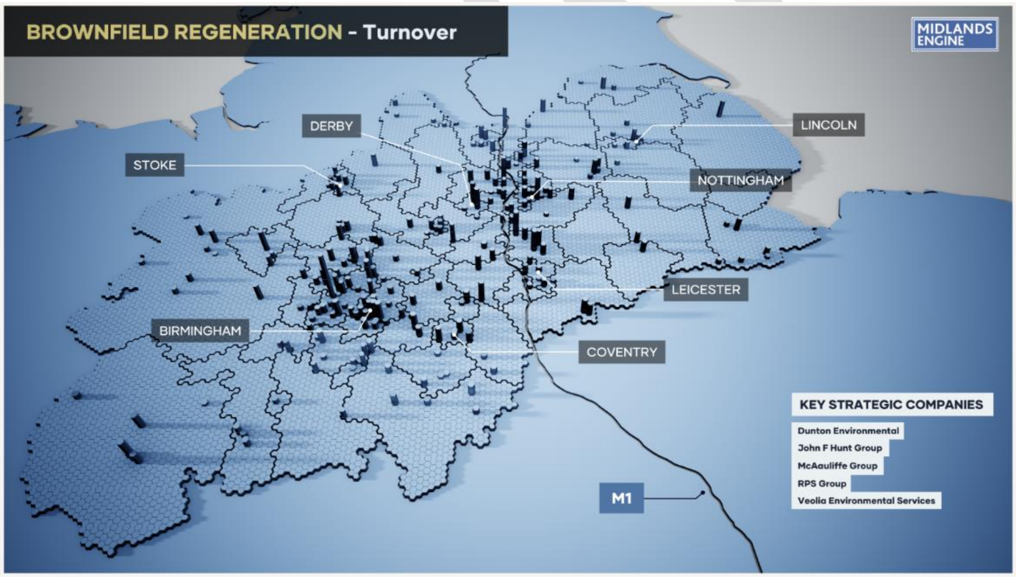
- Carver
- Wulfrun Building Solutions
- Midwest Mechanical and Electrical Service

## Cluster Analysis and Future Potential

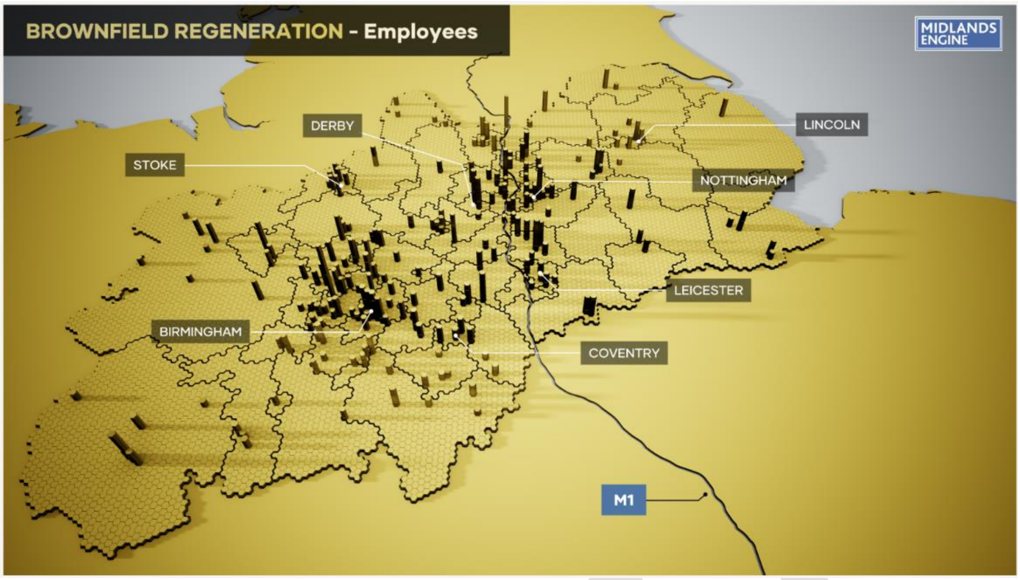
Traditional construction and its trades are therefore important activities in Wolverhampton, and a key enabler of economic growth. There are also major local opportunities to capitalise on new methods of construction and technologies – for example modular / offsite construction, brownfield land remediation and the integration of digital in building / engineering technologies and also net zero practices (e.g., circular economy).

There has been much investment and focus on the sustainable construction ecosystem in Wolverhampton, including key assets (e.g., Springfield site). This will support potential investment of firms, building on the current base of companies and activity locally.

- Land Remediation is identified by The Data City as one of the most important emerging sectors (via their "RTICs" definition) in Wolverhampton in terms of employee and business count concentration.
- Wolverhampton ranks in the top 20% of local authority areas in the Midlands for brownfield land remediation strength (based on employees) in the Midlands Engine clusters project[4] – which highlights it as an opportunity area due to this and supporting ecosystem.
- This data suggests there are over 20 active businesses in Wolverhampton operating in brownfield land remediation, contributing up to 400 jobs. Key companies include McAuliffe group and ESM Group.




[4] See https://midlandsengine.org/wp-content/uploads/2023/08/ME-Cluster-Snapshot-BROWNFIELD-REGENERATION.pdf




*Source: Midlands Engine*

But also in the fields of **modular construction** and the wider **decarbonisation and digitisation** of construction; incorporating firms such as Metek who have a manufacturing hub in Wolverhampton, and iKnowa – a digital platform for property and building services

## Recent Sector Intelligence and Further Insight

| KEY INSIGHTS |
|---|
| • Monthly construction output in the UK is estimated to have increased 0.4% in volume terms in September 2023. This follows two consecutive falls in monthly construction output. While quarterly output increased 0.1%, coming solely from growth.<br>• This came solely from an increase in repair and maintenance (2.1%), partially offset by a decrease in new work (0.8% fall) on the month.<br>• Total construction new orders increased 3.9% (£393 million) in Quarter 3 2023 compared with Quarter 2 2023; this quarterly rise came mainly from public other new orders and infrastructure new orders, which increased 23.7% (£265 million) and 14.3% (204 million), respectively.<br>• More broadly there has been concern about the state of the UK construction industry in 2023, with mortgage rate increases driving demand down, compounded by rising costs of materials, planning delays and shortages in skilled labour. The Construction Products Association said in July that the construction industry will experience an acute recession this year.<br>• Approximately 4,280 UK construction businesses became insolvent in the 12 months leading up to June this year, according to data from the government's Insolvency Service. According to a report from the Financial Times, this marks a 16.5% increase compared with the same period a year earlier.<br>• On wider infrastructure, regional businesses who are trying to secure new premises are still finding it difficult to find one suitable for the business needs, even on a pan-regional and national basis. |

## Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
|---|---|---|
| **41-43** | Building Technologies | Building Technologies |

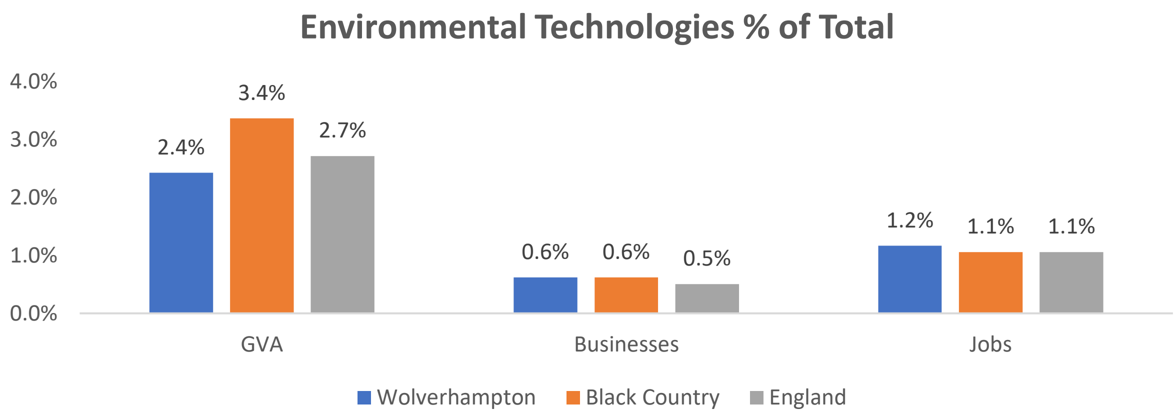
# Environmental Technologies

### Overall Size

- £134m GVA, 2.4% of total Wolverhampton GVA (£5.5bn)
- 55 businesses, 0.6% of total Wolverhampton businesses (8,845)
- 1,275 jobs, 1.2% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a lower proportion of environmental technologies GVA compared to the national average (2.4% of the local total GVA compared to 2.7% nationally), but the sector is much more productive than the total Wolverhampton average.
- Wolverhampton has a slightly higher proportion of environmental technologies businesses than the England average (0.6% compared to 0.5%).
- Wolverhampton has a slightly higher proportion of environmental technologies jobs compared to the national average (1.2% of the local total jobs compared to 1.1%).




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for environmental technologies.

- Jobs: 1.10, above Black Country wide figure of 1.00
- GVA: 0.89, below Black Country wide figure of 1.24
- Businesses: 1.23, matching the Black Country wide figure of 1.23

Looking deeper into the jobs data allows analysis of specific environmental technologies activities that Wolverhampton has strength in. This confirms that the following are areas of high concentration in Wolverhampton:

**Wolverhampton Environmental technologies: High LQ Activities**

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 39: Remediation activities and other waste management services. This division includes the provision of remediation services, i.e., the cleanup of contaminated buildings and sites, soil, surface or ground water. | 100 | 2.26 |
| 36: Water collection, treatment and supply | 300 | 2.07 |
| 37: Sewerage | 150 | 1.55 |
| ***5 Digit SIC Level*** | | |
| 38320: Recovery of sorted materials | 350 | 6.72 |
| 35220: Distribution of gaseous fuels through mains | 200 | 3.56 |
| 39000: Remediation activities and other waste management services | 100 | 2.27 |
| 36000: Water collection, treatment and supply | 300 | 2.08 |
| 37000: Sewerage | 150 | 1.56 |

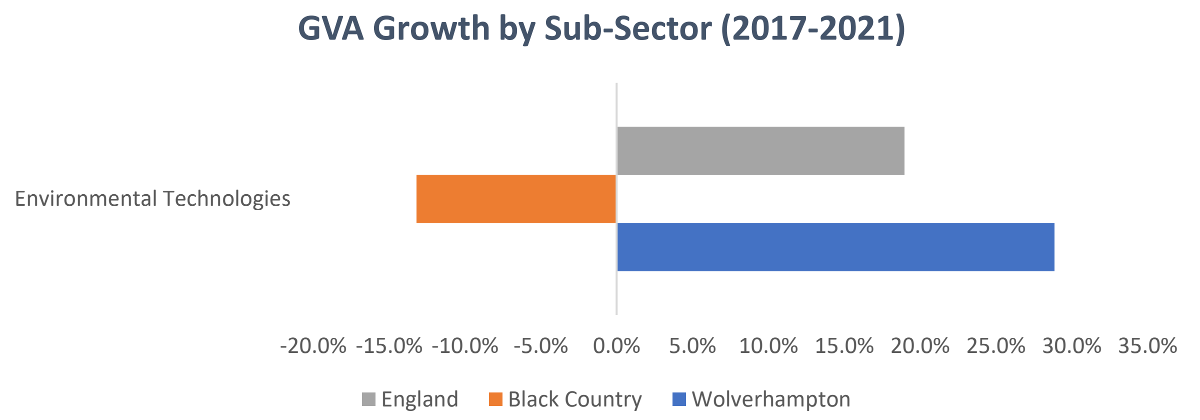
*Source: ONS, BRES, 2023*

This analysis suggests several specific environmental technologies strengths in Wolverhampton, including:

- Recovery of sorted materials.
- Water collection, treatment and supply.
- Sewerage.
- Electricity, gas, steam and air conditioning supply, especially distribution of gaseous fuels through mains.
- Remediation activities (linked to the construction sector and brownfield land remediation).

## Growth

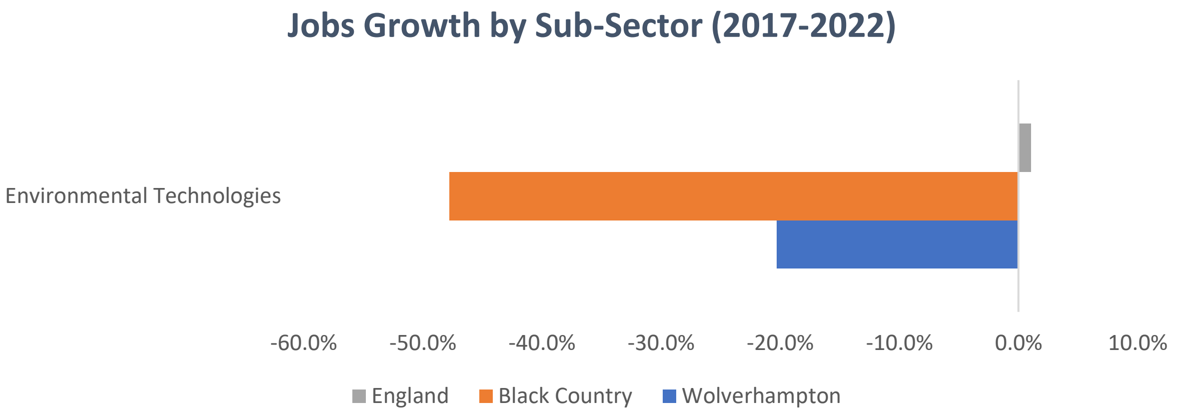
- Between 2015 and 2021, environmental technologies GVA in Wolverhampton grew by 30.1%, higher than that of the Black Country but lower than England (-19.2% and +16.5% respectively). This growth was slightly lower than overall GVA growth seen across Wolverhampton's economy in this time period (+30.7%).
- More recently, since 2017 GVA has grown by 28.8% in this sector, compared to -13.2% and +19.0% in the Black Country and England respectively.



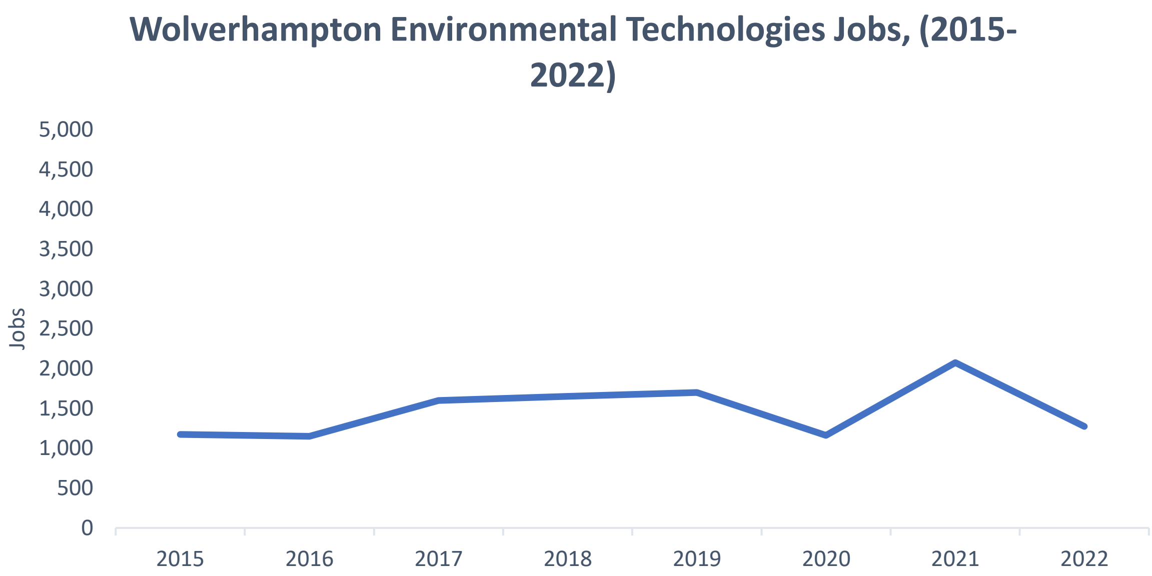

*Source: ONS, Regional gross value added (balanced) by industry, 2023*

There were more environmental technologies jobs in 2022 than in 2015. The number of sector employees in Wolverhampton rose by +8.5% in this period, whereas the national average increase was +13.9%.

- More recently, since 2017, there has been a decline in environmental technologies jobs, at -20.3%, compared to +1.1% in England. This decline has been particularly pronounced when looking at the change between 2021 and 2022, with Wolverhampton jobs in the sector falling by -39%, compared to growth of 15% across England as a whole.




*Source: ONS, BRES, 2023*




### Strategic Companies

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- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- McAuliffe Group
- MES Environmental
- S&B Waste Management
- Ovivo
- Recycled Plastics UK

And **high growth firms** including:

- McAuliffe Group
- Materials Recovery Limited
- NRJ Consultancy Services

### Cluster Analysis and Future Potential

As highlighted, as a cluster in itself the broad "environmental technologies" sector is relatively modest in size in Wolverhampton, but with key strengths and future opportunities. In particular, there is local specialisation in **waste collection, gas distribution and metals recovery.** While according to data from The Data City, within net zero, "waste management and recycling", "renewable energy planning" and "low carbon energy generation" are the most common activities of businesses identified in Wolverhampton. Energy management, including "energy management systems" and "smart meters" are also relatively common activities in Wolverhampton.

**Waste and the use of circular economy principles** seems particularly relevant to Wolverhampton, especially with use of metals and construction a good opportunity. While **utilities** and links to **brownfield remediation** are relevant too.

| Sub-Sector | Estimated Jobs | Estimated Businesses | Key Businesses | Estimated Growth per Year |
|---|---|---|---|---|
| Net Zero | 500-100 | 60 | S&B Waste Management & Recycling, VK Recycling, Technology Minerals | +0.80% |
| Energy / Utilities | 250-500 | 40-60 | Energy Angels, Ace Solar Energy, Neal Energy Solutions, CL Refurbishments, Ovivo | +3.9% |
| Circular Economy | 250-500 | 40-60 | Recycled Plastics UK, S&B Waste Management & Recycling, VK Recycling, Materials Recovery, JME Glass Recycling | +1.6% |
| Nuclear | - | - | Ansaldo Nuclear | - |

*Source: DataCity, 2023*

More broadly, all sectors will need to decarbonise and contribute to net zero, with some clusters in Wolverhampton particularly important for their future survival and growth; e.g.:

- Harnessing future manufacturing opportunities such as in electric vehicles, lightweighting, future propulsion.
- Utilising low carbon and modern methods of construction.
- Net zero transport technologies within logistics & e-commerce as well as application across automotive, aerospace and rail.

### Recent Sector Intelligence and Further Insight

| KEY INSIGHTS |
| --- |
| • The Enterprise Research Centre recently published a research report mapping net zero support for small businesses across England. The focus of the project was on schemes, initiatives, and organisations offering specific or targeted initiatives to support small firms' net zero transition. As part of the work, the ERC have published regional summary reports including for the West Midlands.<br>• Several recent reports have been published relating to the green economy; for example "The Cluster Effect" from the Green Alliance. This is focused on the need for a place-based green industrial strategy in the UK.<br>• Furthermore, the Sustainable Food Report 2022 focuses on the sustainability of agriculture and food, and analysis from the CBI has shown that making the most of 27 green growth 'prizes' could deliver a £37-57 billion boost to GDP by 2030, equivalent to between 1.6% and 2.4% of GDP. But, as other countries make serious pitches for green investment, businesses fear that the UK faces a ticking clock and serious competition to realise these opportunities. |

### Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
| --- | --- | --- |
| **35-39** | Environmental technologies | Environmental technologies |

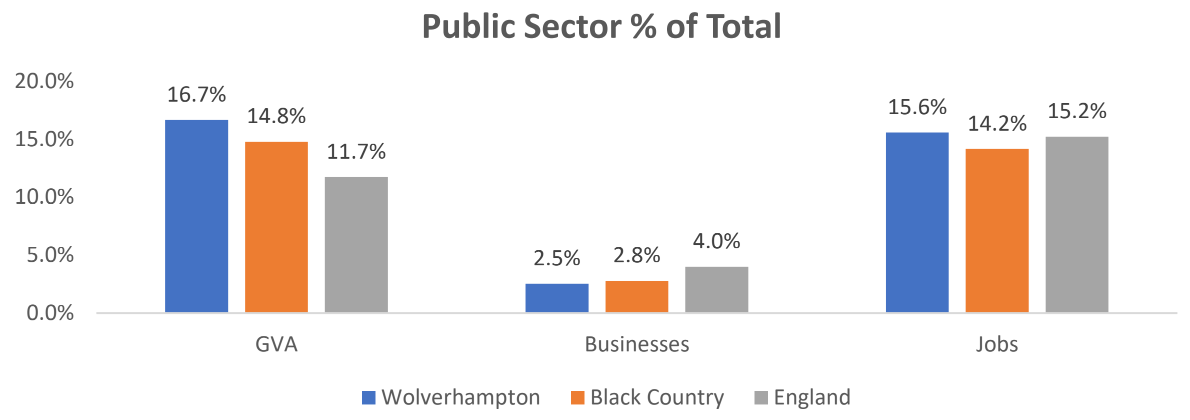
# Public Sector including Education.

### Overall Size

- £920m GVA, 16.7% of total Wolverhampton GVA (£5.5bn)
- 225 businesses, 2.5% of total Wolverhampton businesses (8,845)
- 17,000 jobs, 15.6% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a higher proportion of public sector GVA compared to the Black Country (16.7% of local total GVA compared to 14.8% in the Black Country). Local GVA is also proportionally higher than the national level of 11.7% for total GVA in England.
- Wolverhampton has a lower proportion of public sector businesses than both the Black Country and national average (2.5% compared to 2.8% and 4.0% respectively).
- Wolverhampton has a higher proportion of public sector jobs compared to the Black Country average (15.6% of the local total jobs compared to 14.2% in the Black Country), and higher than the national average (15.2%). Wolverhampton also has the highest total jobs and highest proportion of public sector jobs in the Black Country.




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Sub-Sector Concentration

| Sector | GVA (£m) | Jobs | Businesses | GVA per employee |
|---|---|---|---|---|
| **Public Sector inc. Education** | **£920** | **17,000** | **225** | **£54,118** |
| Education | £566 | 11,000 | 125 | £51,455 |
| Public Sector | £354 | 6,000 | 100 | £59,000 |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

**Public Sector Sub-Sectors: Share of Economy Totals in Wolverhampton and England**

| | GVA | | Jobs | | Businesses | |
|---|---|---|---|---|---|---|
| | W'ton | England | W'ton | England | W'ton | England |
| Education | 10.2% | 6.3% | 10.1% | 8.5% | 1.4% | 1.8% |
| Public Sector | 6.4% | 5.4% | 5.5% | 6.7% | 1.1% | 2.2% |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for the public sector.

- Jobs: 1.02, above Black Country wide figure of 0.93
- GVA: 1.42, above Black Country wide figure of 1.26
- Businesses: 0.64, below Black Country wide figure of 0.70.

Looking deeper into the jobs data allows analysis of specific public sector activities that Wolverhampton has strength in. This confirms that the following are areas of high concentration in Wolverhampton:

### Wolverhampton Public Sector: High LQ Activities

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 85: Education | 11,000 | 1.18 |
| 84: Public administration and defence; compulsory social security | 5,000 | 1.06 |
| ***5 Digit SIC Level*** | | |
| 85410: Post-secondary non-tertiary education | 600 | 5.76 |
| 81222: Specialised cleaning services | 75 | 1.56 |
| 84110: General public administration activities | 3,500 | 1.50 |
| 85200: Primary education | 5,000 | 1.43 |
| 85310: General secondary education | 2,500 | 1.19 |
| 85590: Other education nec | 900 | 1.06 |

*Source: ONS, BRES, 2023*

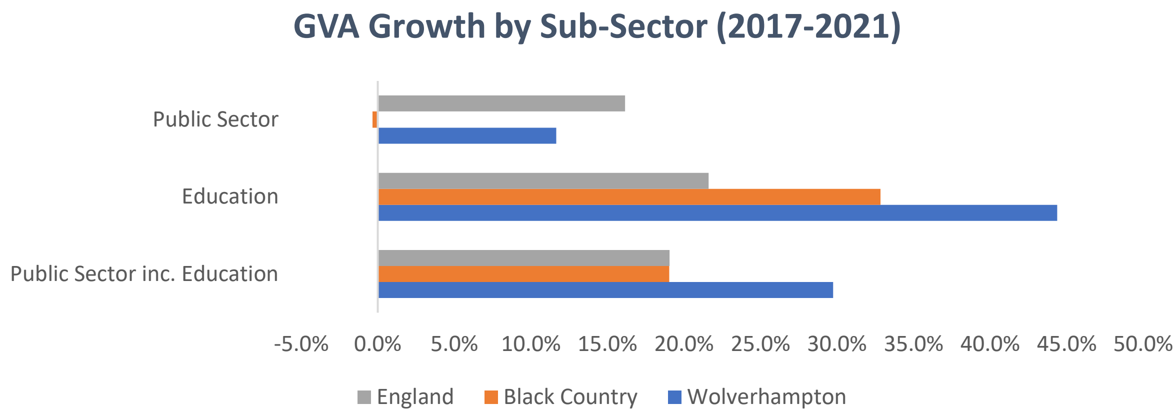
This analysis suggests a range of public sector strengths in Wolverhampton, including:

- Education, especially post-secondary non-tertiary education and both primary and secondary education.
- Public sector administration in general.
- Specialised cleaning services

### Growth

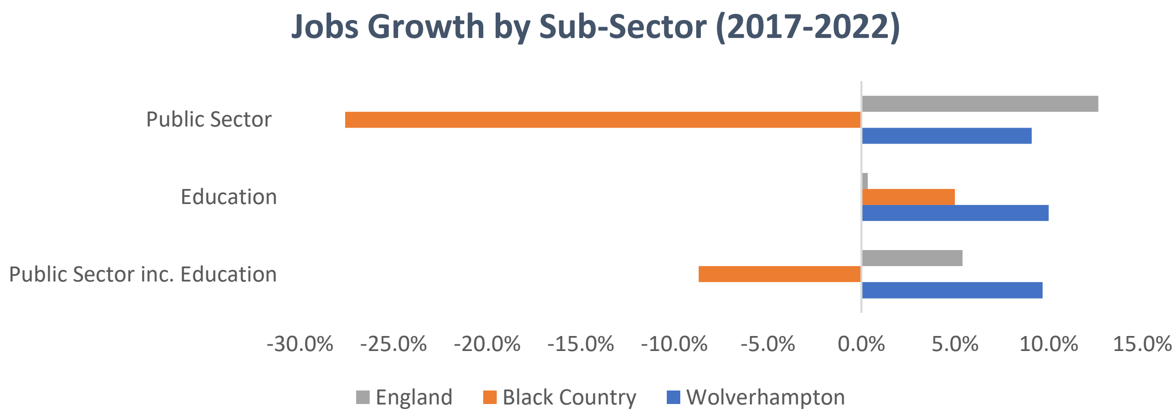
- Between 2015 and 2021, public sector GVA in Wolverhampton grew by 51.6%, higher than growth across the Black Country (32.6%) and across the England (25.6%). This growth exceeded the growth seen across Wolverhampton’s economy in this period (30.7%).

- More recently, since 2017, Wolverhampton's GVA has grown by 29.8% in this sector, compared to +19% and +19.1% in the Black Country and England respectively. Growth was only seen in the Real Estate and Associated Consultancy sub-sector at +10.2%, with all the other sub-sectors seeing a decline over this period.
- GVA growth in education was +44.4%, exceeding growth across the Black Country (+32.8%) and England (21.6%).
- Wolverhampton has seen growth in public sector GVA of 11.7% since 2017, whereas the Black Country saw growth of -0.3%. Both areas are behind the national average of +16.2%

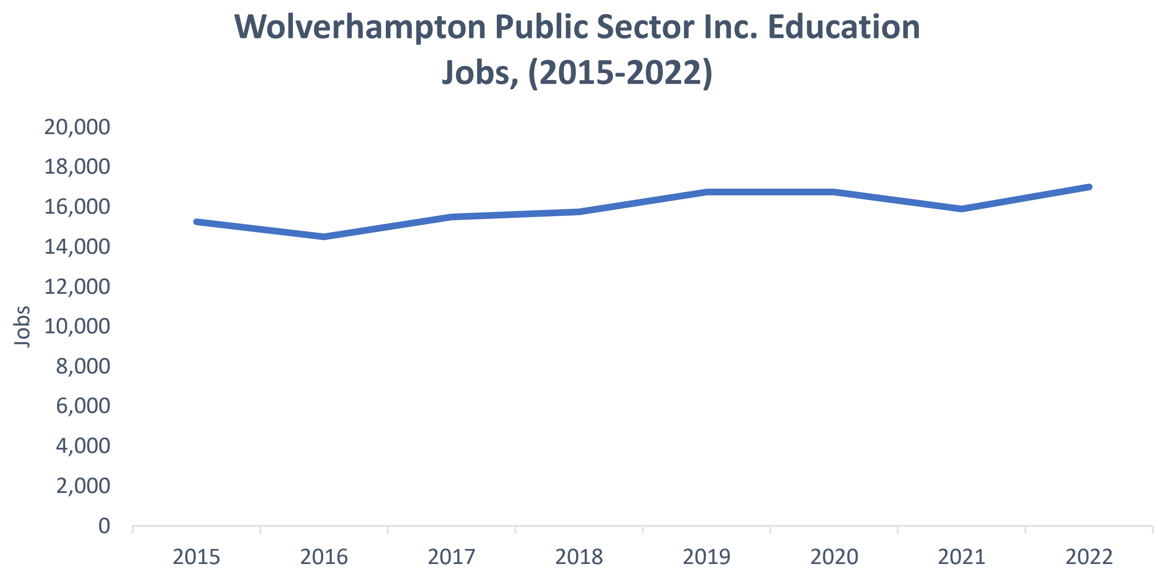



*Source: ONS, Regional gross value added (balanced) by industry, 2023*

- Despite Black Country jobs declining by 10% between 2015 and 2022 in this sector, Wolverhampton saw an 11.5% increase in jobs across the public sector and education. Wolverhampton also exceeded the national average of +5.1%.
- Since 2017, Wolverhampton has seen an increase of 9.7% of jobs in this sector, exceeding Wolverhampton's growth across all industries of 6.3%. Comparatively, in the same period Black Country jobs in this sector declined by 8.7%, with public sector jobs alone decreasing by 27.6%.




*Source: ONS, BRES, 2023*




*Source: ONS, BRES, 2023*

### Strategic Companies

Key strategic companies outlined in the following maps / report:

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Wolverhampton City Council
- Central Learning Partnership Trust
- Elston Hall Learning Trust
- Amethyst Academies Trust
- Shine Academies
- The Khalsa Academies Trust
- University of Wolverhampton

### Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
|---|---|---|
| **81** | Public Sector inc. Education | Education |
| **84** | Public Sector inc. Education | Public Sector |
| **85** | Public Sector inc. Education | Public Sector inc. Education |

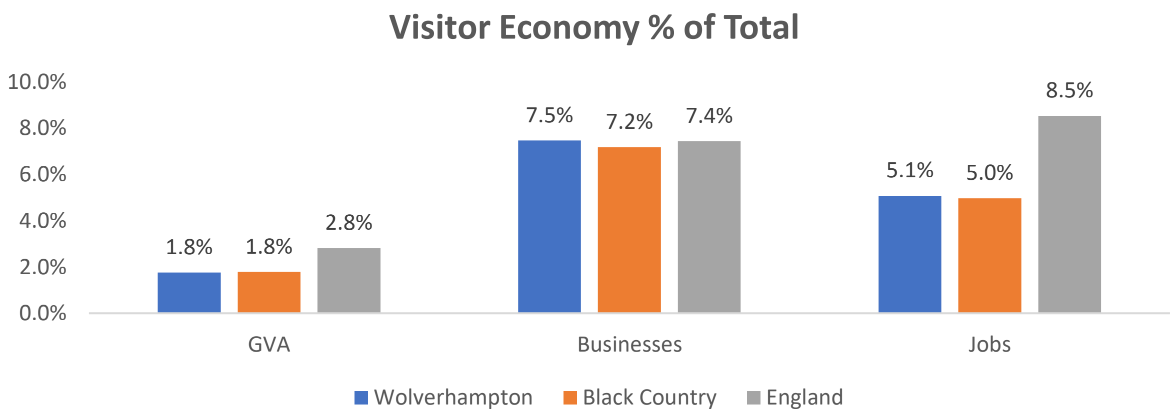
## Visitor Economy

### Overall Size

- £97m GVA, 1.8% of total Wolverhampton GVA (£5.5bn)
- 660 businesses, 7.5% of total Wolverhampton businesses (8,845)
- 5,550 jobs, 5.1%% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton matches the Black Country average in terms of GVA in this sector (1.8% of total GVA), however this is lower than the national level (2.8% of total GVA across England).
- Visitor economy businesses make up 7.5% of businesses in Wolverhampton, which is higher than the Black Country average (7.2%) however this is slightly lower than the national average (7.4%).
- Wolverhampton has a higher proportion of visitor economy jobs compared to the Black Country average (5.1% of jobs locally compared to 5.0%). The national figures are higher than both Wolverhampton and the Black Country at 8.5% of jobs.




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Sub-Sector Concentration

| Sector | GVA (£m) | Jobs | Businesses | GVA per employee |
|---|---|---|---|---|
| **Visitor Economy (All)** | **£97** | **5,550** | **660** | **£49,591** |
| Accommodation | £9 | 300 | 15 | £10,193 |
| Hospitality | £78 | 5,000 | 615 | £31,579 |
| Visitor Economy (Other) | £10 | 250 | 30 | £7,819 |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

**Visitor Economy Sub-Sectors: Share of Economy Totals in Wolverhampton and England**

| | GVA | | Jobs | | Businesses | |
|---|---|---|---|---|---|---|
| | W'ton | England | W'ton | England | W'ton | England |
| **Visitor Economy (All)** | **1.8%** | **2.8%** | **5.1%** | **8.5%** | **7.5%** | **7.4%** |
| Accommodation | 0.2% | 0.6% | 0.3% | 1.4% | 0.2% | 0.6% |
| Hospitality | 1.4% | 1.8% | 4.6% | 6.5% | 7.0% | 5.5% |
| Visitor Economy (Other) | 0.2% | 0.4% | 0.2% | 0.6% | 0.3% | 1.3% |

*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

## Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for transport technologies.

- Jobs: 0.60, above Black Country wide figure of 0.58.
- GVA: 0.62, below Black Country wide figure of 0.63.
- Businesses: 1.00, above Black Country wide figure of 0.96.

Looking deeper into the jobs and businesses data allows analysis of specific visitor economy activities that Wolverhampton has strength. This confirms that the following are areas (highlighted in green) of high concentration in Wolverhampton:

### Wolverhampton Visitor Economy: High LQ Activities

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 55: Accommodation | 300 | 0.20 |
| 56: Food and beverage service activities | 5,000 | 0.70 |
| 90: Creative, arts and entertainment activities | 150 | 0.44 |
| 91: Libraries, archives, museums and other cultural activities | 100 | 0.29 |
| ***5 Digit SIC Level*** | | |
| 56210: Event catering activities | 600 | 1.41 |
| 91012: Archive activities | 10 | 1.00 |

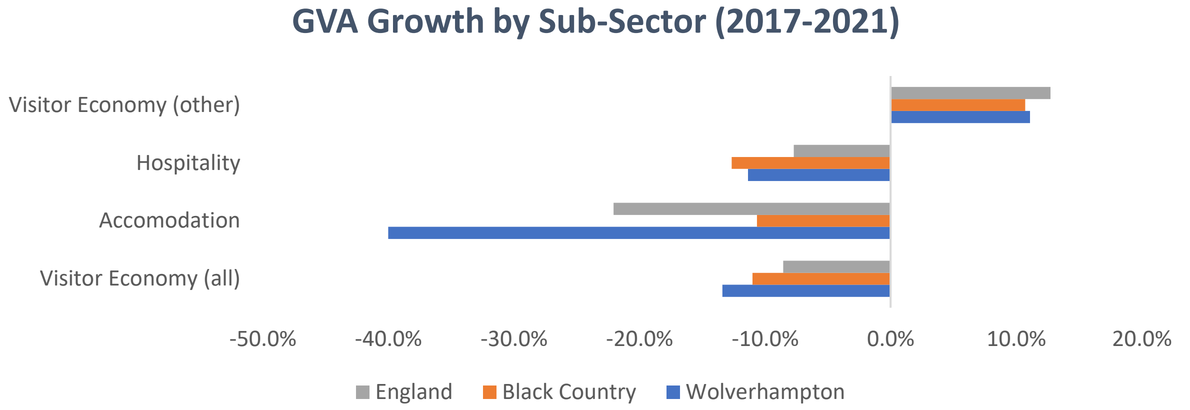
*Source: ONS, BRES, 2023*

This analysis demonstrates that, despite not having comparative strength in the visitor economy, it is a sizeable employer in Wolverhampton; especially within hospitality (food and beverage services).

## Growth

- Between 2015 and 2021, GVA growth Wolverhampton's visitor economy was +7.8%, exceeding the growth across the Black Country and England (+7.3% and +4.6% respectively).

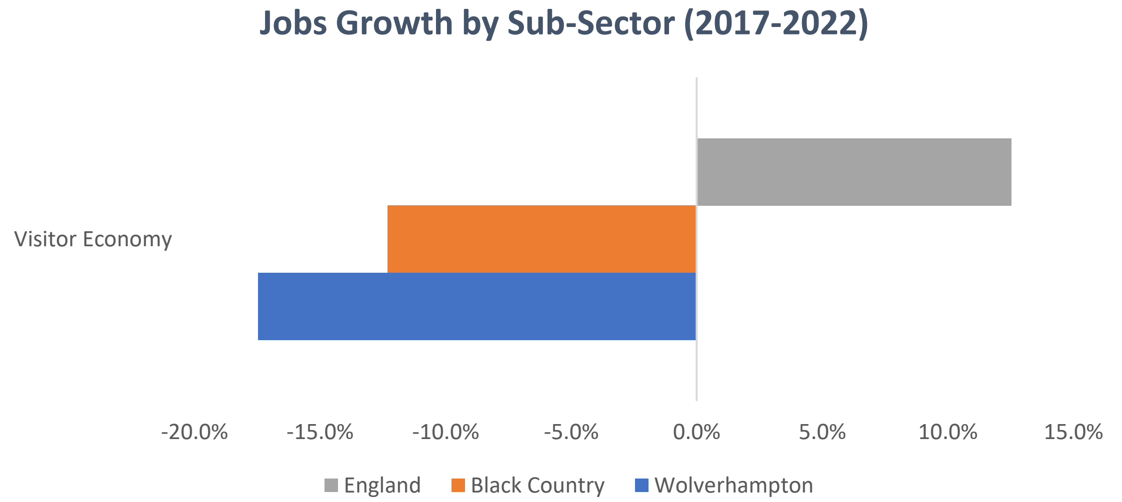
- More recently (between 2017 and 2021), Wolverhampton's GVA from the visitor economy saw a decline of -13.4%, driven by a decline in GVA in the accommodation sector of -40% and a decline in GVA in hospitality of -12.7%. GVA in the Black Country and England also decreased in this period (-11.0% and -8.6% respectively), reflective of major challenges associated with the Covid-19 pandemic.



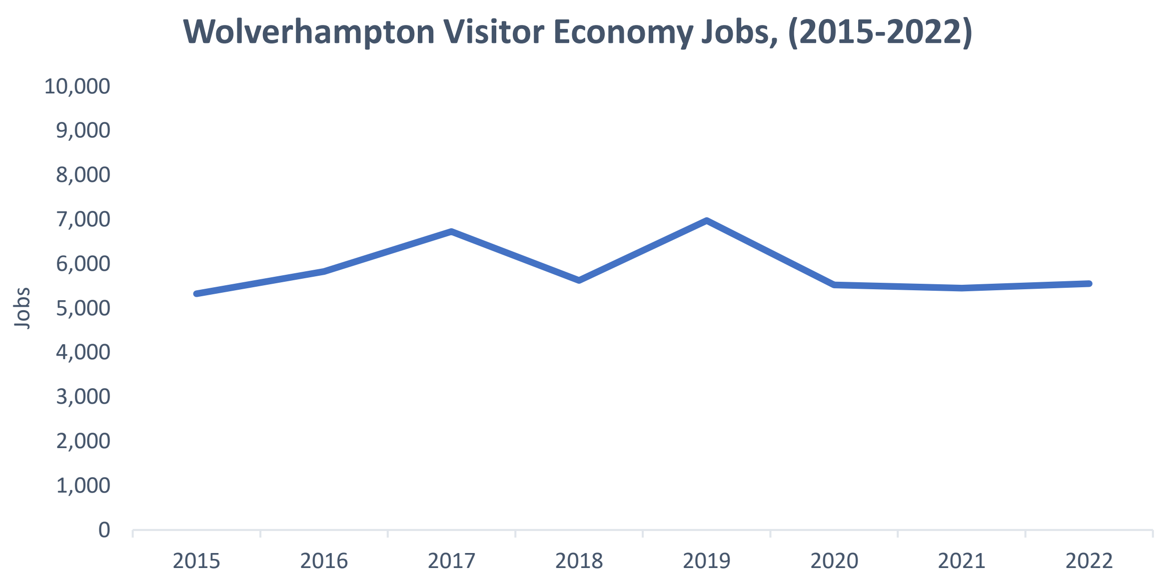

*Source: ONS, Regional gross value added (balanced) by industry, 2023*

*Visitor Economy (all) represents the whole sector, whereas visitor economy (other) is activities that sit outside of hospitality and accommodation.*

- From 2015 to 2021, visitor economy jobs increased by 4.2% in Wolverhampton, exceeding the increase in visitor economy jobs across the Black Country (+0.2%) however this was much less than the 20.1% increase in visitor economy jobs seen across England.
- More recently, visitor economy jobs in Wolverhampton significantly decreased since 2017 (-17.5%), despite jobs in the sector increasing by 12.5% across England in the same period.
- The 2022 Wolverhampton jobs figures don't show a recovery in jobs yet (in contrast to the England average), rather they are at a very similar level to 2021.




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Strategic Companies

Key strategic companies outlined in the following maps / report and also through information held by City of Wolverhampton Council and The EIU.

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Wolverhampton Grand Theatre
- Marston’s Plc
- The Halls Wolverhampton
- Caffe Kix Limited

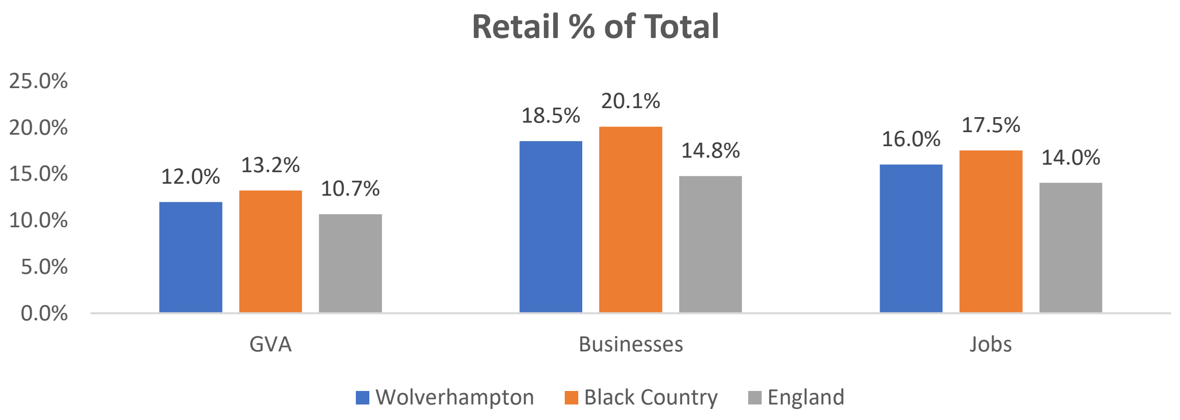
## Retail and Wholesale

### Overall Size

- £661m GVA, 12% of total Wolverhampton GVA (£5.5bn)
- 1,640 businesses, 18.5% of total Wolverhampton businesses (8,845)
- 17,500 jobs, 16% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a lower proportion of its total GVA from the retail and wholesale sector than the Black Country (12.0% compared to 13.2% respectively). However, Wolverhampton's retail and wholesale sector accounts for a larger proportion of total GVA than seen across England (10.7%).
- Wolverhampton has a lower proportion of retail and wholesale businesses than the Black Country (18.5% of local businesses compared to 20.1% across the Black Country) however a higher proportion of retail businesses than the national average (14.8%).
- Similarly, Wolverhampton has a lower proportion of retail and wholesale jobs compared to the Black Country (16.0% and 17.5% respectively), however a higher proportion than seen nationally (14.0% across England).




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for retail and wholesale.

- Jobs: 1.14, below Black Country wide figure of 1.25
- GVA: 1.12, below Black Country wide figure of 1.24
- Businesses: 1.25, below Black Country wide figure of 1.36

Looking deeper into the jobs and businesses data allows analysis of specific retail and wholesale activities that Wolverhampton has strength. This confirms that the following are areas (highlighted in green) of high concentration in Wolverhampton:

**Wolverhampton Retail and Wholesale: High LQ Activities**

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 45: Wholesale and retail trade and repair of motor vehicles and motorcycles | 2,500 | 1.33 |
| 46: Wholesale trade, except of motor vehicles and motorcycles | 5,000 | 1.19 |
| 47: Retail trade, except of motor vehicles and motorcycles | 10,000 | 1.08 |
| ***5 Digit SIC Level*** | | |
| 46341: Wholesale of fruit and vegetable juices, mineral waters and soft drinks | 500 | 24.95 |
| 46320: Wholesale of meat and meat products | 1,000 | 11.88 |
| 46620: Wholesale of machine tools | 200 | 6.24 |
| 46720: Wholesale of metals and metal ores | 600 | 6.24 |
| 45190: Sale of other motor vehicles | 175 | 4.37 |
| 47749: Retail sale of medical and orthopaedic goods (other than hearing aids) nec, in specialised stores | 100 | 4.16 |
| 46330: Wholesale of dairy products, eggs and edible oils and fats | 200 | 3.84 |
| 47890: Retail sale via stalls and markets of other goods | 40 | 3.33 |
| 46770: Wholesale of waste and scrap | 125 | 3.12 |
| 46350: Wholesale of tobacco products | 40 | 2.85 |
| 47810: Retail sale via stalls and markets of food, beverages and tobacco products | 50 | 2.49 |
| 46450: Wholesale of perfume and cosmetics | 225 | 2.44 |
| 45111: Sale of new cars and light motor vehicles | 900 | 2.20 |
| 47599: Retail sale of furniture, lighting equipment and other household articles (other than musical instruments) nec, in speci | 700 | 2.13 |
| 47820: Retail sale via stalls and markets of textiles, clothing and footwear | 10 | 2.00 |
| 47730: Dispensing chemist in specialised stores | 600 | 2.00 |

*Source: ONS, BRES, 2023*

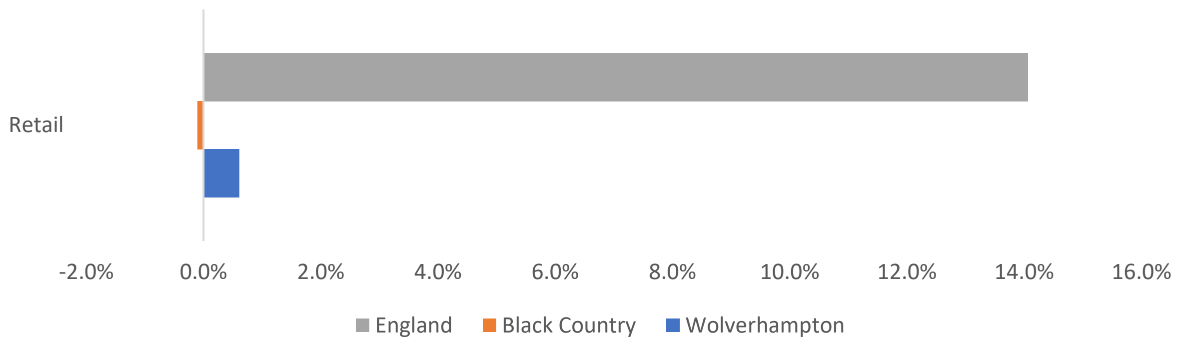
This analysis suggests a range of retail and wholesale strengths in Wolverhampton, including:

- The wholesale of food products such as meat, dairy and fruit.
- The retail sale of a variety of goods including cars, medical goods, and furniture, lighting equipment and other household articles.
- The sale of goods through market stalls.
- Wholesale of other goods generally linked to manufacturing sectors, such as machine tools, metals and metal ores and waste / scrap.

## Growth

- Between 2015 and 2021, retail and wholesale GVA in Wolverhampton grew by 27.6%, exceeding the GVA growth seen in the Black Country and across England (16.5% and 22.2% respectively).
- More recently, from 2017 to 2021, retail and wholesale GVA in Wolverhampton saw slight growth of 0.6% despite the Black Country as a whole seeing a decline in GVA of -0.1%. Both Wolverhampton and the Black Country show relative weakness to rest of the country in the retail sector as GVA grew by 14.1% in the same period.

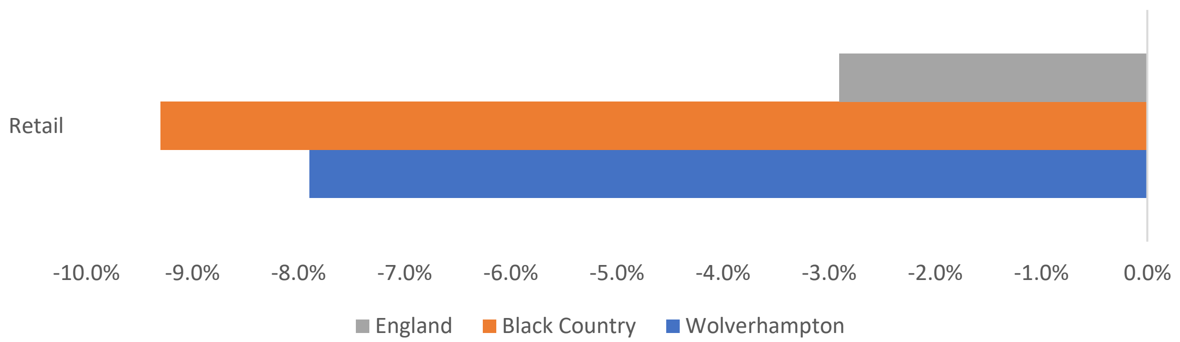
**GVA Growth by Sector (2017-2021)**




*Source: ONS, Regional gross value added (balanced) by industry, 2023*

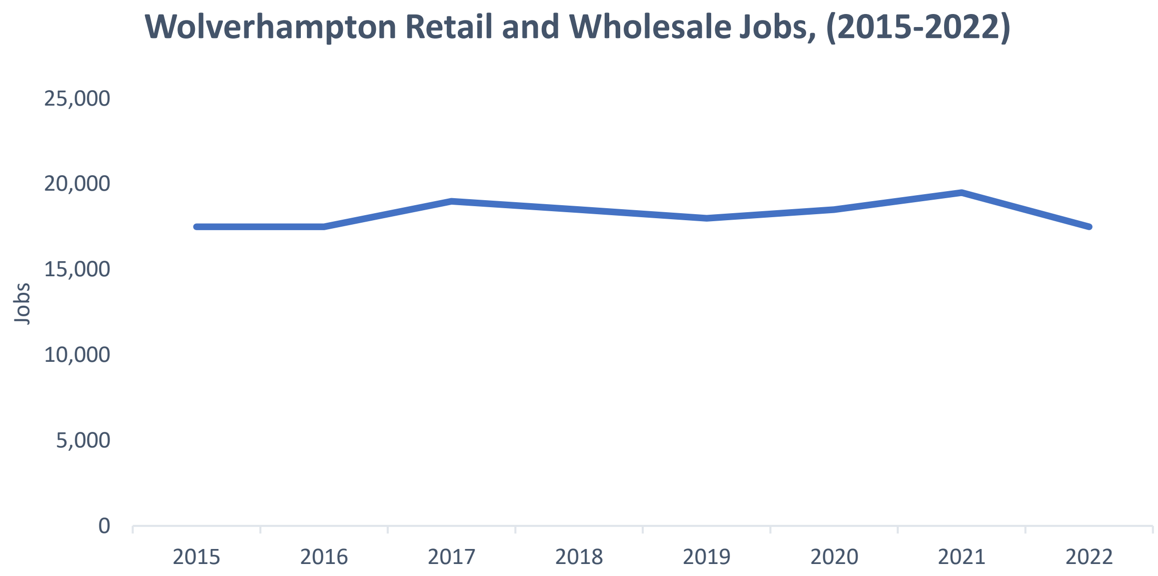
- The retail and wholesale sector in Wolverhampton saw a significant decline in jobs between 2017-2022, where jobs decreased by 7.9%. In the same period, Black Country jobs in the sector decreased by 9.3% and retail jobs across England decreased by 2.9%, again perhaps indicative of pandemic impacts but also the structural decline of some high streets.
- Concerningly, much of the decline was reported in the last yearly change – a decrease of 2,000 retail and wholesale jobs in Wolverhampton between 2021 and 2022 – compared to a 9% increase nationally.

**Jobs Growth by Sector (2017-2022)**




*Source: ONS, BRES, 2023*

- Wolverhampton's retail and wholesale sector showed strength in terms of business growth between 2015-2021, where retail business growth exceeded the Black Country and national levels (+14.7% locally compared to +13.3% in the Black Country and +10.1% across England).






**Strategic Companies**

Key strategic companies outlined in the following maps / report and also through information held by City of Wolverhampton Council and The EIU.

- Strategic Companies (arcgis.com)
- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- AF Blakemore
- Task Consumer Products
- Barlow Motors
- Johal Dairies
- ERA Home Security
- Tile Choice
- Absolute Apparel

And **high growth firms** including:

- Task Consumer Products
- Nautilus Designs
- W.Brindley Garages
- Ultimate Cleaners (Industrial)
- Middleton Food Products

**Recent Sector Intelligence and Further Insight – Retail, Hospitality and the Visitor Economy**

| KEY INSIGHTS |
|---|
| • Official data on UK retail sales shows that they fell to a two-year low in October 2023. The volume of products sold fell by 0.3% to the lowest level since February 2021 when large parts of the UK were in Covid lockdowns.<br>• Complementing this, retail sales volumes fell year-on-year in November for the seventh consecutive month, according to the latest quarterly CBI Distributive Trades Survey. Despite a slight uptick in sentiment, firms expect sales to decline again in December. |

| KEY INSIGHTS |
| --- |
| • Retail sales volumes fell in the year to November, but at a slower pace than last month (weighted balance of -11% from -36% in the year to October). Retailers expect an even slower decline in volumes next month (-6%).<br>• Retailers also reported a reduction in headcount in the year to November, while investment is set to decline in the year ahead. Price pressures in the sector are expected to remain acute.<br>• There were mixed feelings from retail and hospitality related to the Autumn Statement; while on one hand the business rates relief extension is welcomed, The British Retail Consortium have claimed the Statement is a "sell out" that risks forcing up the pace of price rises in shops again. |

### Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
| --- | --- | --- |
| **45-47** | Retail and Wholesale | Retail and Wholesale |

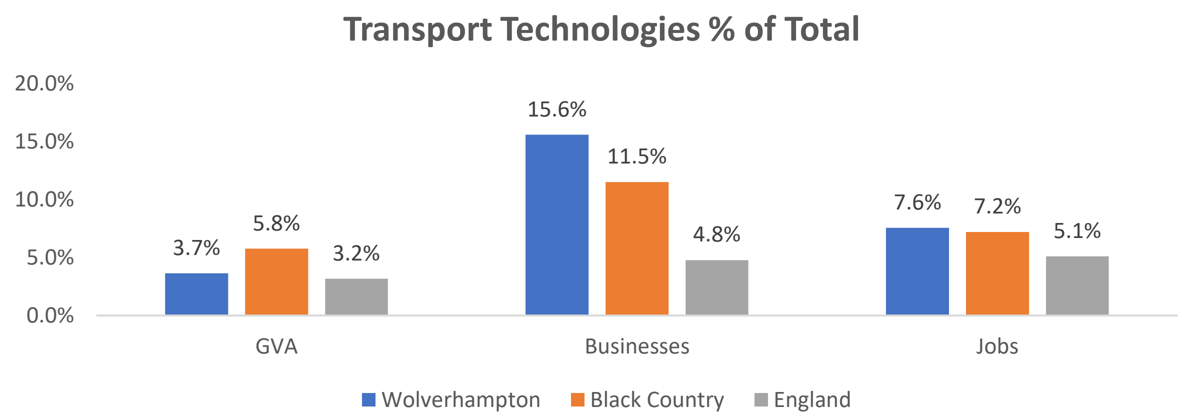
# Transport Technologies and Logistics

## Overall Size

- £202m GVA, 3.7% of total Wolverhampton GVA (£5.5bn)
- 1,380 businesses, 15.6% of total Wolverhampton businesses (8,845)
- 8,270 jobs, 7.6% of total Wolverhampton jobs (109,230)

## Local / National Comparison

- Wolverhampton has a lower proportion of transport technologies GVA compared to the Black Country average (3.7% of the local total GVA compared to 5.8% in the Black Country), but higher than England (3.2%).
- Wolverhampton has a much higher proportion of transport technologies businesses than the Black Country and the national average (15.6% compared to 11.5% and 4.8% respectively).
- Wolverhampton has a higher proportion of transport technologies jobs compared to the Black Country and national average (7.6% of the local total jobs compared to 7.2% in the Black Country and 5.1% in England).




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

## Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for transport technologies.

- Jobs: 1.48, above Black Country wide figure of 1.41
- GVA: 1.15, below Black Country wide figure of 1.82
- Businesses: 3.26, above Black Country wide figure of 2.40.

Looking deeper into the jobs and businesses data allows analysis of specific transport technologies activities that Wolverhampton has strength. This confirms that the following are areas (highlighted in green) of high concentration in Wolverhampton:

**Wolverhampton Transport Technologies: High LQ Activities**

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 49: Land transport and transport via pipelines | 5,000 | 2.74 |
| 53: Postal and courier activities | 1,500 | 1.55 |
| ***5 Digit SIC Level*** | | |
| 52213: Operation of bus and coach passenger facilities at bus and coach stations | 50 | 13.86 |
| 49410: Freight transport by road | 3,500 | 4.18 |
| 52243: Cargo handling for land transport activities of division 49 | 20 | 3.99 |
| 49100: Passenger rail transport, interurban | 600 | 3.18 |
| 49319: Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems | 800 | 2.19 |
| 53100: Postal activities under universal service obligation | 1,000 | 1.77 |
| 53201: Licensed Carriers | 45 | 1.40 |
| 51210: Freight air transport | 20 | 1.11 |
| 52219: Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway stations or passenger facilities at bus and coach stations) | 300 | 1.05 |

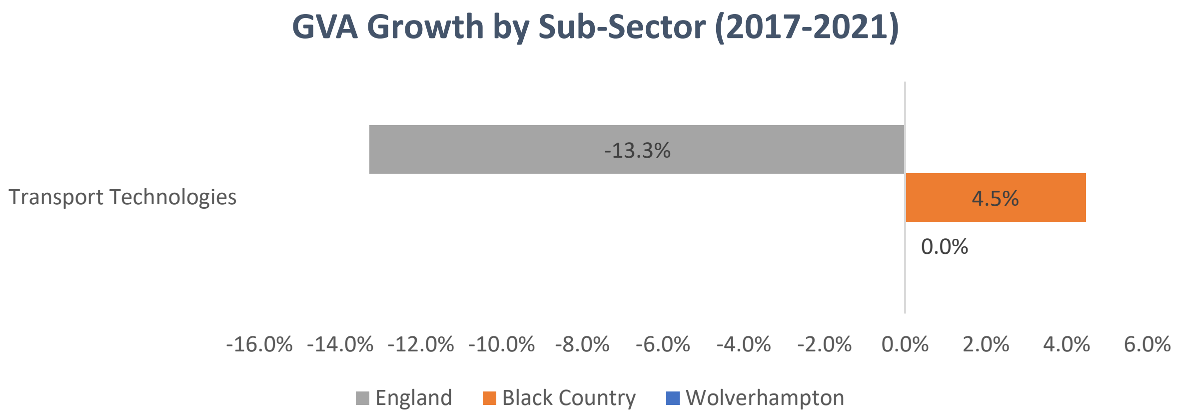
*Source: ONS, BRES, 2023*

This analysis suggests a range of transport technologies strengths in Wolverhampton, including:

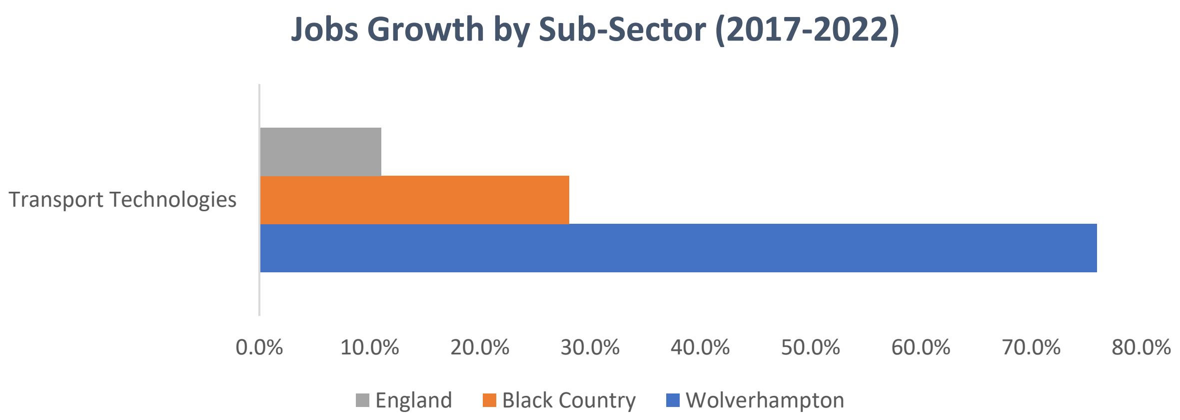
- Couriers and freight transport by road, given its central location and continued reliance on industry and supply chain networks.
- Passenger / public transport provision, including train, tram, bus and other land transport.
- Postal services.

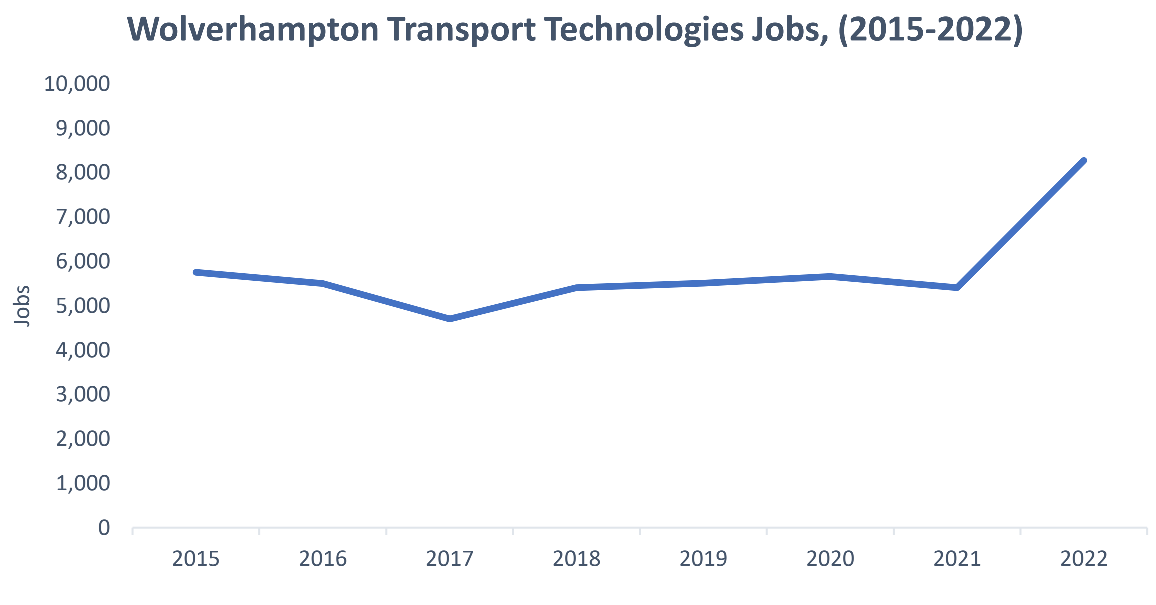
## Growth

- Between 2015 and 2021, transport technologies GVA in Wolverhampton grew by 26.3%, higher than that of the Black Country and England (14.1% and -8.1% respectively). This growth was lower than overall GVA growth seen across Wolverhampton's economy in this time period (+30.7%).
- Since 2017, Wolverhampton GVA in the transport technologies sector has remained unchanged, whereas the Black Country has seen 4.5% growth. However, both show strength compared to the national average where over this period with GVA growth being -13.3% across England.




- Since 2017, Wolverhampton has seen proportionally higher growth in transport technologies jobs than the Black Country and across England, where local jobs increased by 76.0% compared to an increase of 28.1% in the Black Country and 11.0% across England.
- There was a sharp increase in the number of transport technologies jobs in Wolverhampton between 2021 and 2022 (+53%, representing almost 3,000 jobs).



### Strategic Companies

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- ME Strategic Companies (arcgis.com)
- Strategic Companies Barometer (2021)

Including:

- Pallet-Track Limited
- Royal Mail
- Mainline Haulage Limited
- Alstom Transport
- A W Baxter Limited

And **high growth firms** including:

- Pallet-Track
- A W Baxter
- Majors Service
- PHW Services
- Mint Logistics

### Recent Sector Intelligence and Further Insight

| KEY INSIGHTS |
|---|
| • Take-up of industrial and logistics space across the Midlands (units of 100,000 sq. ft +) reached 4.12 million sq. ft in H1 2023, according to Savills latest Big Shed Briefing. While this is down on recent years, take-up for the year to date surpasses the first half of 2019, signifying a return to levels seen prior to the pandemic.<br>• Logistics and transport firms in the West Midlands are still seeing effects from Brexit with exporting and importing costs with some cases of delayed shipping due to customs.<br>• Furthermore, issues with attraction and retention of drivers continue, with facilities for drivers throughout the UK deemed not good enough compared to European facilities.<br>• CBRE's UK Logistics Market Summary for Q3 2023 shows that, with a year-to-date (YTD) take-up of over 2.8m sq ft, the West Midlands the region the second most active in the UK. |

### Annex: Sector and Sub-Sector Definition

| SIC code | Black Country Sector | Black Country Sub-Sector |
|---|---|---|
| **47-53** | Transport Technologies | Transport Technologies |

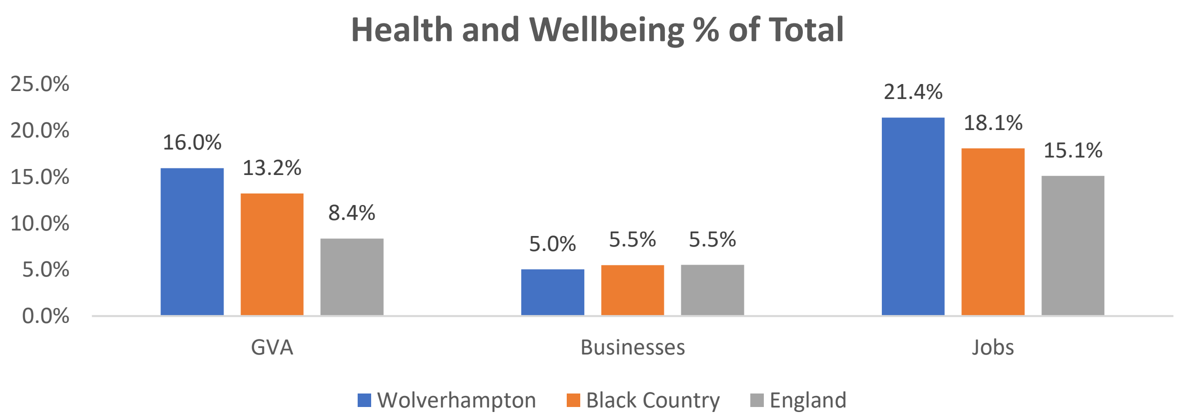
## Health & Wellbeing

### Overall Size

- £882m GVA, 16.0% of total Wolverhampton GVA (£5.5bn)
- 445 businesses, 5.0% of total Wolverhampton businesses (8,845)
- 23,400 jobs, 21.4% of total Wolverhampton jobs (109,230)

### Local / National Comparison

- Wolverhampton has a higher proportion of health & wellbeing GVA compared to the Black Country average (16% of the local total GVA compared to 13.2% in the Black Country), and much higher than the national average (8.4%).
- Wolverhampton has a lower proportion of health & wellbeing businesses than both the Black Country and national average (5.0% compared to 5.5% and 5.5% respectively).
- Wolverhampton has a much higher proportion of jobs in health & wellbeing than the Black Country and national average (21.4% of local jobs compared to 18.1% and 15.1% respectively), stressing the area's reliance on the NHS and wider health service for employment.




*Source: ONS, Regional gross value added (balanced) by industry, 2023, ONS, UK Business Counts 2023, ONS, BRES, 2023*

### Location Quotients

Applying location quotients to all industries in Wolverhampton provides the following results for the health & wellbeing sector.

- Jobs: 1.41, above Black Country wide figure of 1.20
- GVA: 1.91, above Black Country wide figure of 1.58
- Businesses: 0.91, below Black Country wide figure of 0.99

Looking deeper into the jobs and businesses data allows analysis of specific health & wellbeing activities that Wolverhampton has strength in. This confirms that the following are areas of high concentration in Wolverhampton:

**Wolverhampton Health & Wellbeing: High LQ Activities**

| Sector Sub-Activity | Jobs | Jobs LQ |
|---|---|---|
| ***2 Digit SIC Level*** | | |
| 86: Human health activities | 15,000 | 1.67 |
| 87: Residential care activities | 3,000 | 1.21 |
| 93: Sports activities and amusement and recreation activities | 1,750 | 1.08 |
| 88: Social work activities without accommodation | 3,000 | 1.02 |
| ***5 Digit SIC Level*** | | |
| 86101: Hospital activities | 12,000 | 2.19 |
| 93120: Activities of sport clubs | 1,000 | 1.96 |
| 87900: Other residential care activities | 1,500 | 1.66 |
| 87300: Residential care activities for the elderly and disabled | 1,250 | 1.54 |
| 86102: Medical nursing home activities | 400 | 1.23 |
| 88990: Other social work activities without accommodation nec | 1,500 | 1.14 |

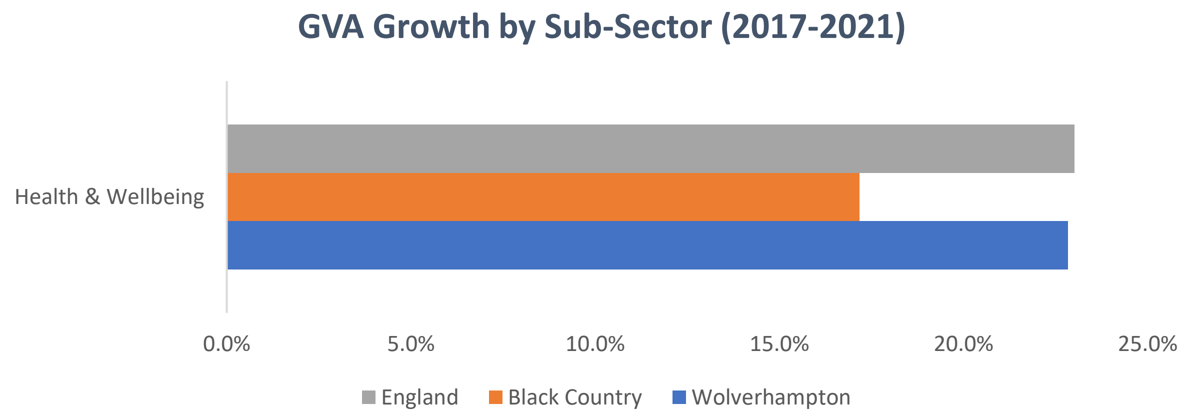
*Source: ONS, BRES, 2023*

This analysis suggests a range of health & wellbeing strengths in Wolverhampton, including:

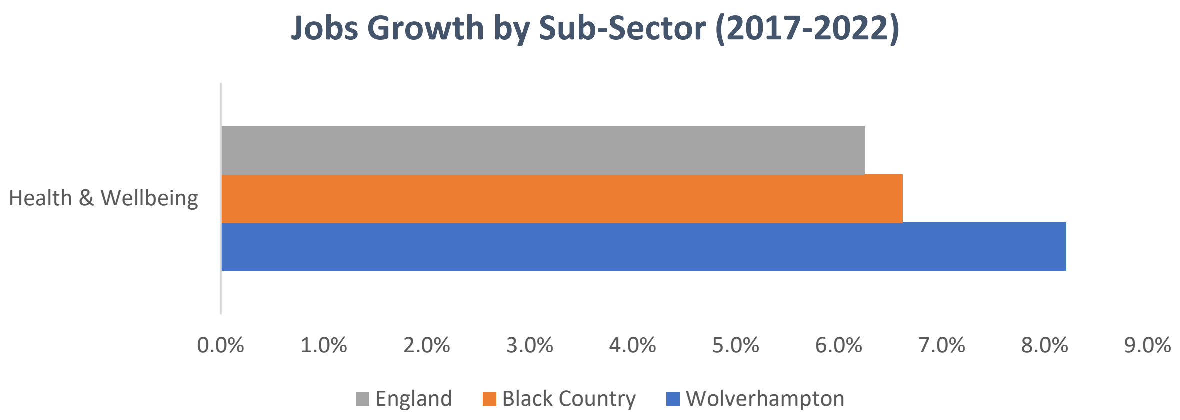
- Core health services in hospitals
- Residential and social care services
- Sports and entertainment activities

**Growth**

- Across 2015 and 2021, health and wellbeing GVA in Wolverhampton grew by 48.8%, exceeding the averages across Black Country and England (27.3% and 34.6% respectively). GVA growth in health and wellbeing was also higher than growth across Wolverhampton's economy in this period (+30.7%).
- More recently, GVA in health and wellbeing has grown by 22.8% in Wolverhampton since 2017. This is higher than the growth seen across the Black Country in this period (17.2%) and just slightly lower than the national growth in this sector of 23% across England.

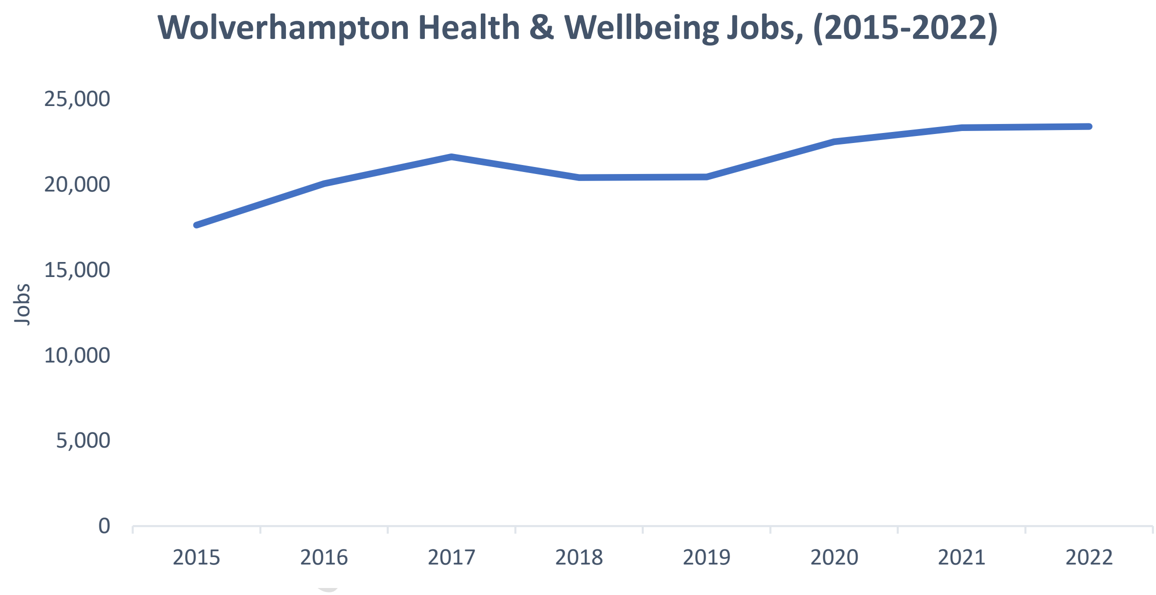



*Source: ONS, Regional gross value added (balanced) by industry, 2023*




*Source: ONS, BRES, 2023*

- From 2015 to 2021, Wolverhampton saw a 32.8% increase in health & wellbeing jobs, showing greater job growth than the Black Country and national averages (22.5% and 11.7% respectively).
- Wolverhampton has seen a proportionally greater increase in jobs since 2017 compared to the Black Country and England in this sector. Local jobs increased by 8.2% compared to 6.6% growth in the Black Country and 6.3% nationally.




*Source: ONS, BRES, 2023*

**Strategic Companies**

Key strategic companies / organisations outlined in the following maps / report and also through information held by City of Wolverhampton Council and the EIU.

- [Strategic Companies (arcgis.com)]
- [ME Strategic Companies (arcgis.com)]
- [Strategic Companies Barometer (2021)]

Including:

- New Cross Hospital
- Royal Wolverhampton Hospitals NHS Trust
- West Park Rehabilitation Hospital
- Penn Hospital
- Wolverhampton Wanderers Football Club
- Bromford Support
- Phoenix Health Centre
- Sevacare UK

**Life Sciences**

Due to difficulties in defining life sciences by traditional SIC codes, data for this activity is not included within the above sector definition.

However, the Office for Life Sciences publishes data on the life sciences sector, available here: https://www.gov.uk/government/statistics/bioscience-and-health-technology-sector-statistics-2021 and including a regional breakdown of activity as well as a full directory of companies working in the sector.

This list includes 14 companies in Wolverhampton:

| | |
|---|---|
| **3W MEDICAL LTD** | **FIRST LINK (UK) LTD** |
| **ACUITY DESIGNS LTD** | **J.R. WOODDISSE AND COMPANY LIMITED** |
| **AIRGUARD MEDICAL LIMITED** | **MEDICAL DEVICES TECHNOLOGY INTERNATIONAL LIMITED** |
| **BOC HEALTHCARE LIMITED** | |
| **CAPITOL MOBILITY SERVICES LIMITED** | **PHARMFIRST CONSULTANCY LIMITED** |
| **COLLINS & KIMPTON LIMITED** | **SCIENTIFIC AND CHEMICAL SUPPLIES LIMITED** |
| **DISULFICAN LIMITED** | **TRUST HYGIENE SERVICES LIMITED** |
| **EMMAT MEDICAL LIMITED** | **TYTEK GROUP UK LTD** |

The vast majority of these (all but 2 – Emmat Medical and Scientific and Chemical Supplies) have a turnover of less than £1m.

## Annex: Sector and Sub-Sector Definition

| **Health & Wellbeing** |
|---|
| **75: Veterinary activities** |
| **86: Human health activities** |
| **87: Residential care activities** |
| **88: Social work activities without accommodation** |
| **92: Gambling and betting activities** |
| **93: Sports activities and amusement and recreation activities** |

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