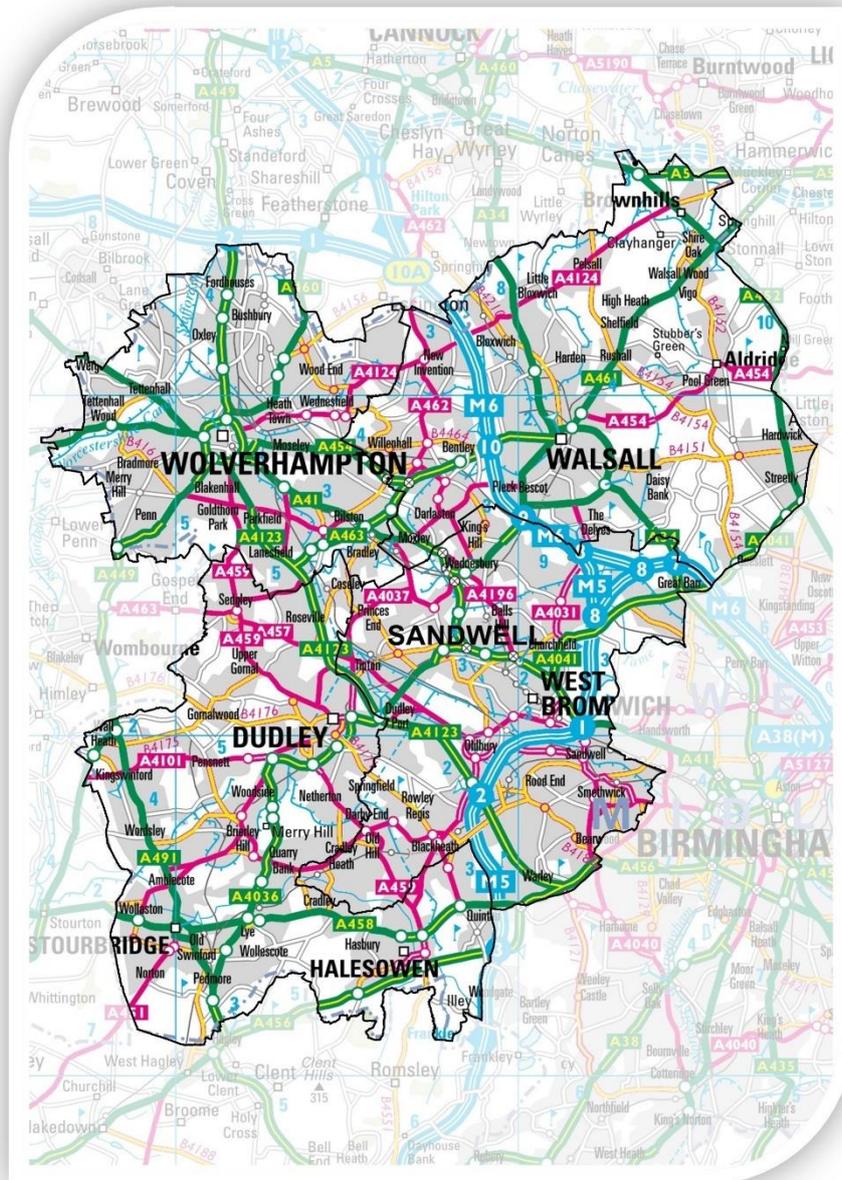


Black Country State of the Sub Region 2023



Our Measures of Success - The Black Country Performance Management Framework

In the Black Country we will:	Where we are now		Change over the last year ¹		Direction of Travel Relative to National Average since 2004		Scale of the Challenge (To reach England where applicable)	
Grow our Population and Reverse Net Outward Migration Particularly to Environs	DUD	324,969	DUD	+1,378 (+0.4%)	DUD	+18,798 (+6.1%)		
	SAN	344,210	SAN	+2,315 (+0.7%)	SAN	+55,361(+19.2%)		
	WAL	286,105	WAL	+1,713 (+0.6%)	WAL	+29,403 (+11.5%)		
	WOL	267,651	WOL	+3,391 (+1.3%)	WOL	+27,084 (+11.3%)		
	BC	1,222,935	BC	+8,797 (+0.7% BC) +1.0% Eng.	BC	+130,646 (+12.0% BC) +13.8% Eng.		
Raise Incomes	DUD	£31,635	DUD	+£1,470 (+4.9%)	DUD	+£12,444 (+64.8%)	DUD	+£3,465
	SAN	£29,594	SAN	+£2,134 (+7.8%)	SAN	+£10,885 (+58.2%)	SAN	+£5,506
	WAL	£30,295	WAL	+£1,974 (+7.0%)	WAL	+£11,617 (+62.2%)	WAL	+£4,805
	WOL	£29,621	WOL	-£86 (-0.3%)	WOL	+£11,056 (+59.6%)	WOL	+£5,479
	BC	£30,286* (avg.)	BC	+£1,373 (+4.7% BC) +5.5% Eng.	BC	+£11,501 (+61.2% BC) +56.4% Eng.	BC	+£4,314 Eng.: £35,100
Achieve Better Population Balance	DUD	17.0%			DUD	-0.1pp	DUD	+16,257
	SAN	10.8%			SAN	0.0pp	SAN	+36,179
	WAL	13.7%			WAL	-0.5pp	WAL	+22,370
	WOL	13.4%			WOL	-0.3pp	WOL	+21,620
	BC	13.6%			BC	-0.3pp BC +0.5pp Eng.	BC	+96,427 Eng.: 23.5% AB's
Transform the Environment	70.5% of residents satisfied with Black Country as a place to live						77.8% resident satisfaction	
Regenerated Our Economy (pp = percentage points)								
Reduce the Output Gap	DUD	£4.6bn	DUD	+£315m	DUD	+£2.4bn	DUD	-£4.6bn
	SAN	£4.2bn	SAN	+£972m	SAN	+£2.7bn	SAN	-£4.2bn
	WAL	£4.0bn	WAL	+£102m	WAL	+£2.2bn	WAL	-£4.0bn
	WOL	£2.7bn	WOL	-£11m	WOL	+£1.6bn	WOL	-£2.7bn
	BC	£15.5bn	BC	+£1.4bn	BC	+£8.1bn	BC	-£15.5bn
Raise the Number of Local Jobs	DUD	110,000	DUD	-6,000 (-5.2%)	DUD	-8,000 (-6.8%)		
	SAN	126,000	SAN	+2,000 (+1.6%)	SAN	+3,000 (+2.4%)		
	WAL	102,000	WAL	+2,000 (+2.0%)	WAL	+8,000 (+8.5%)		
	WOL	109,000	WOL	+3,000 (+2.8%)	WOL	+5,000 (+4.8%)		
	BC	447,000	BC	+1,000 (+0.2% BC) +2.4% Eng.	BC	+8,000 (+1.8% BC) +17.7% Eng.		
Increase the Total Employment Rate	DUD	76.5%	DUD	-0.1pp	DUD	+3.5pp	DUD	Above England
	SAN	65.4%	SAN	-0.4pp	SAN	+1.0pp	SAN	+21,635
	WAL	71.7%	WAL	-2.6pp	WAL	+3.3pp	WAL	+7,024
	WOL	66.4%	WOL	-4.6pp	WOL	-2.4pp	WOL	+15,464
	BC	70.0%	BC	-1.8pp BC +0.1pp Eng.	BC	+1.3pp BC +2.9pp Eng.	BC	+42,592 Eng.: 75.8%
Increase the Percentage of Knowledge Workers	DUD	50.0%	DUD	+3.8pp	DUD		DUD	+3,940
	SAN	34.3%	SAN	-8.8pp	SAN		SAN	+25,962
	WAL	37.0%	WAL	+1.7pp	WAL		WAL	+19,782
	WOL	37.6%	WOL	-7.8pp	WOL		WOL	+16,850
	BC	40.1%	BC	-2.4pp BC +1.4pp Eng.	BC		BC	+66,634 Eng.: 52.5%
Raise Enterprise Births	DUD	1,390	DUD	-210 (-13.1%)	DUD	+200 (+16.8%)	DUD	+320 P.A.
	SAN	1,635	SAN	-125 (-7.1%)	SAN	+695 (+73.9%)	SAN	+177 P.A.
	WAL	1,270	WAL	-265 (-17.3%)	WAL	+225 (+21.5%)	WAL	+236 P.A.
	WOL	1,510	WOL	-665 (-30.6%)	WOL	+510 (+51.0%)	WOL	Above England
	BC	5,805	BC	-1,265 (-17.9%) -7.4% Eng.	BC	+21,630 (+39.0% BC) +21.0% Eng.	BC	+632 P.A. Eng.: 53 per 10,000 pop.
Reduce the Percentage of Workless Households	DUD	15.4%	DUD	+1,400 (+11.6%)	DUD	-2,200 (-14.0%)	DUD	-1,846
	SAN	20.2%	SAN	+5,100 (+36.7%)	SAN	-400 (-2.1%)	SAN	-6,463
	WAL	18.3%	WAL	+1,500 (+11.2%)	WAL	-900 (-5.7%)	WAL	-4,034
	WOL	18.2%	WOL	+1,600 (+13.1%)	WOL	-1,400 (-19.2%)	WOL	-3,642
	BC	18.1%	BC	+9,500 (+18.4%) +0.2% Eng.	BC	-5,000 (-7.6% BC) -15.4% Eng.	BC	-15,886 Eng.: 13.4%
Increase the Number of Visitors to the Area	33.05m						A leading UK visitor destination	

In the Black Country we will:	Where we are now		Change over the last year ¹		Direction of Travel Relative to National Average since 2004		Scale of the Challenge (To reach England where applicable)	
1. Sustainable Environmental Transformation								
Increase the Hectares of Local Nature Reserves	887.3ha		-		-		1ha of Local Nature Reserve per 1,000 pop.	
Have a Sustainable Environment- Reduce CO ² Emissions (tonnes per capita)	DUD	3.3	DUD	+0.3	DUD	-2.8	44% reduction on 2005 figures	
	SAN	3.8	SAN	+0.3	SAN	-3.7		
	WAL	3.5	WAL	+0.3	WAL	-3.2		
	WOL	3.4	WOL	+0.3	WOL	-3.3		
	BC	3.5	BC	+0.3 BC +0.3 Eng.	BC	-3.2 BC -4.0 Eng.		
Raised Education and Skills								
Reduce the Number of People with No Qualifications	DUD	6.2%	DUD	-5,300 (-32.7%)	DUD	-16,800 (-60.6%)	DUD	Below England
	SAN	11.8%	SAN	-1,500 (-6.3%)	SAN	-17,800 (-44.3%)	SAN	-9,932
	WAL	11.2%	WAL	+700 (+4.1%)	WAL	-14,100 (-44.5%)	WAL	-7,241
	WOL	13.8%	WOL	+4,300 (-27.7%)	WOL	-14,900 (-42.9%)	WOL	-10,362
	BC	10.6%	BC	-1,700 (-2.3% BC) -1.4% Eng.	BC	-63,600 (-47.3% BC) -52.4% Eng.	BC	-26,914 Eng.: 6.6%
Increase the Number of People with RQF4+	DUD	35.1%	DUD	-5,200 (-7.7%)	DUD	+23,000 (+59.0%)	DUD	+17,739
	SAN	23.5%	SAN	-12,000 (-21.2%)	SAN	+17,500 (+64.3%)	SAN	+40,906
	WAL	36.3%	WAL	+10,800 (+23.3%)	WAL	+29,300 (+105.0%)	WAL	+13,920
	WOL	36.1%	WOL	+5,600 (-9.7%)	WOL	+27,100 (+109.3%)	WOL	+12,902
	BC	32.3%	BC	-12,100 (-5.3% BC) +0.4 Eng.	BC	+96,900 (+81.6% BC) +87.4% Eng.	BC	+85,612 Eng.: 45.1%
Improve Pupils Progress 8 Score	DUD	-0.11	DUD	-0.10	DUD	-	DUD	Improve by 0.08
	SAN	-0.07	SAN	-0.05	SAN	-	SAN	Improve by 0.04
	WAL	-0.20	WAL	-0.12	WAL	-	WAL	Improve by 0.17
	WOL	-0.02	WOL	-0.04	WOL	-	WOL	Above England
	BC	-0.10	BC	-0.08	BC	-	BC	Improve by 0.08 Eng.: -0.03
Reduce the No. of 16–17-Year-Olds Not in Education, Employment or Training (NEET)	DUD	7.4%	DUD	-61 (-9.7%)	DUD	-	DUD	-571
	SAN	1.9%	SAN	-5 (-2.7%)	SAN	-	SAN	-181
	WAL	3.4%	WAL	+55 (27.9%)	WAL	-	WAL	-252
	WOL	3.1%	WOL	+27 (+15.4%)	WOL	-	WOL	-202
	BC	3.9%	BC	+16 (+1.3% BC) +13.6% Eng.	BC	-	BC	No NEETs -1,206
Transformed our Environmental Infrastructure								
Increase Net New Homes	DUD	140,910	DUD	+490 (+0.3%)	DUD	+11,630 (+9.0%)	DUD	
	SAN	135,740	SAN	+480 (+0.4%)	SAN	+13,220 (+10.8%)	SAN	
	WAL	117,700	WAL	+370 (+0.3%)	WAL	+10,250 (+9.5%)	WAL	
	WOL	113,200	WOL	+570 (+0.5%)	WOL	+10,080 (+9.8%)	WOL	
	BC	507,550	BC	+1,910 (+0.4% BC) +1.0% Eng.	BC	+45,180(+9.8% BC) +16.6% Eng.	BC	
Provide Industrial Floorspace	DUD	2,371,000 sqm	DUD	+15,000 sqm	DUD	-590,000 sqm	DUD	
	SAN	3,908,000 sqm	SAN	-2,000 sqm	SAN	-915,000 sqm	SAN	
	WAL	2,201,000 sqm	WAL	+25,000 sqm	WAL	-596,000 sqm	WAL	
	WOL	2,194,000 sqm	WOL	+9,000 sqm	WOL	-574,000 sqm	WOL	
	BC	10,674,000 sqm	BC	+47,000 sqm	BC	-2,675,000 sqm	BC	
Provide Office Floorspace	DUD	258,000 sqm	DUD	-1,000 sqm	DUD	-48,000 sqm	DUD	
	SAN	180,000 sqm	SAN	-2,000 sqm	SAN	-16,000 sqm	SAN	
	WAL	166,000 sqm	WAL	-4,000 sqm	WAL	-7,000 sqm	WAL	
	WOL	211,000 sqm	WOL	+1,000 sqm	WOL	-32,000 sqm	WOL	
	BC	815,000 sqm	BC	-6,000 sqm	BC	-103,000 sqm	BC	
Provide Retail Floorspace	DUD	598,000 sqm	DUD	-5,000 sqm	DUD	-20,000 sqm	DUD	
	SAN	564,000 sqm	SAN	-3,000 sqm	SAN	+71,000 sqm	SAN	
	WAL	507,000 sqm	WAL	-4,000 sqm	WAL	+39,000 sqm	WAL	
	WOL	501,000 sqm	WOL	-6,000 sqm	WOL	-28,000 sqm	WOL	
	BC	2,170,000 sqm	BC	-18,000 sqm	BC	+62,000 sqm	BC	

¹ The green shading illustrates those indicators where the Black Country moved in a positive direction of travel compared to the national average (excluding output gap where the latest change is shaded green due to the positive change and not compared to England), the red shading indicates the reverse and the orange indicates no change or a growth rate in the right direction but less than the national average growth rate. *Indicates that this is an average as official figures have not been released and this figure will be revised. Please note for qualifications, RQF's have replaced NVQs and caution should be used when comparing change over time. West Midlands Growth Company (WMGC) provided the visitor economy figure for the Black Country via the STEAM model.

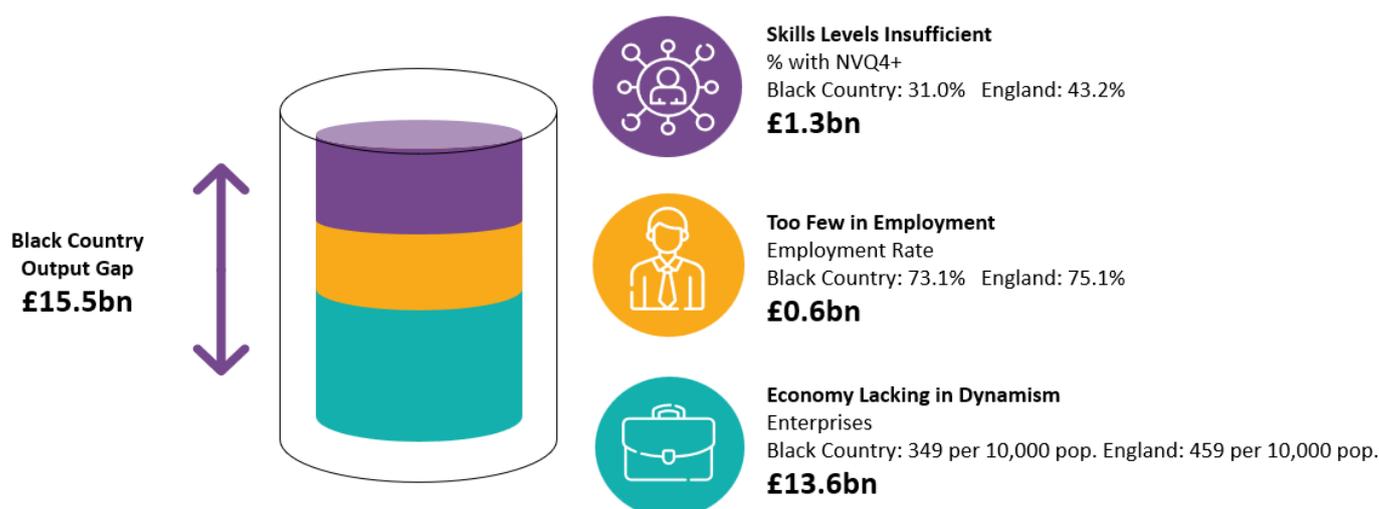
2023 KEY MESSAGES

1.1. Economy

Productivity Challenge

- The **local economies** of Dudley, Sandwell, Walsall and Wolverhampton have been **hit hard and faced yet another turbulent year** characterised by continued recovery from the pandemic, the global impact of the Russia and Ukraine war, a cost-of-living and cost-of-doing business crisis, plus considerable interest rate and inflationary pressures.
- This means that the Black Country local authority areas have a **shared challenge related to the overall output gap² of local economies, collectively totalling £15.5bn**. While overall **GVA³ grew faster in the Black Country than the WMCA average** (+7.1% compared to +6.4%) between 2020 and 2021 (to a total of £22.3bn), the Black Country's **GVA per head⁴ is substantially lower than the WMCA and national average** at £18,345 compared to £24,334 and £30,443 respectively. All four Black Country local authority areas fall below these averages, with Dudley at £17,002, Sandwell at £18,754, Walsall at £16,995 and Wolverhampton at £20,918.

Black Country Output Gap 2021:



- Overall, **GVA per hour⁵ for the Black Country was £31.23 in 2021**, with **strong annual growth of 2.4% (+£0.72)** compared to an increase of 1.5% for England. Over the longer term (since 2004), the Black Country performed above the national average growth rate (+54.8% vs +49.1%). However, in 2021 there was still a **shortfall of £7.68 to reach the England average** (£38.91). Across the Black Country local authorities, there was annual growth of 2.7% in Dudley (to £30.78) and by 3.4% in both Walsall and Wolverhampton (£30.36 and £32.14 respectively), while Sandwell increased by 0.4% (to £31.68). Leading to shortfalls of £7.97 in Walsall, £7.55 in Dudley, £6.65 in Sandwell to £6.19 in Wolverhampton.

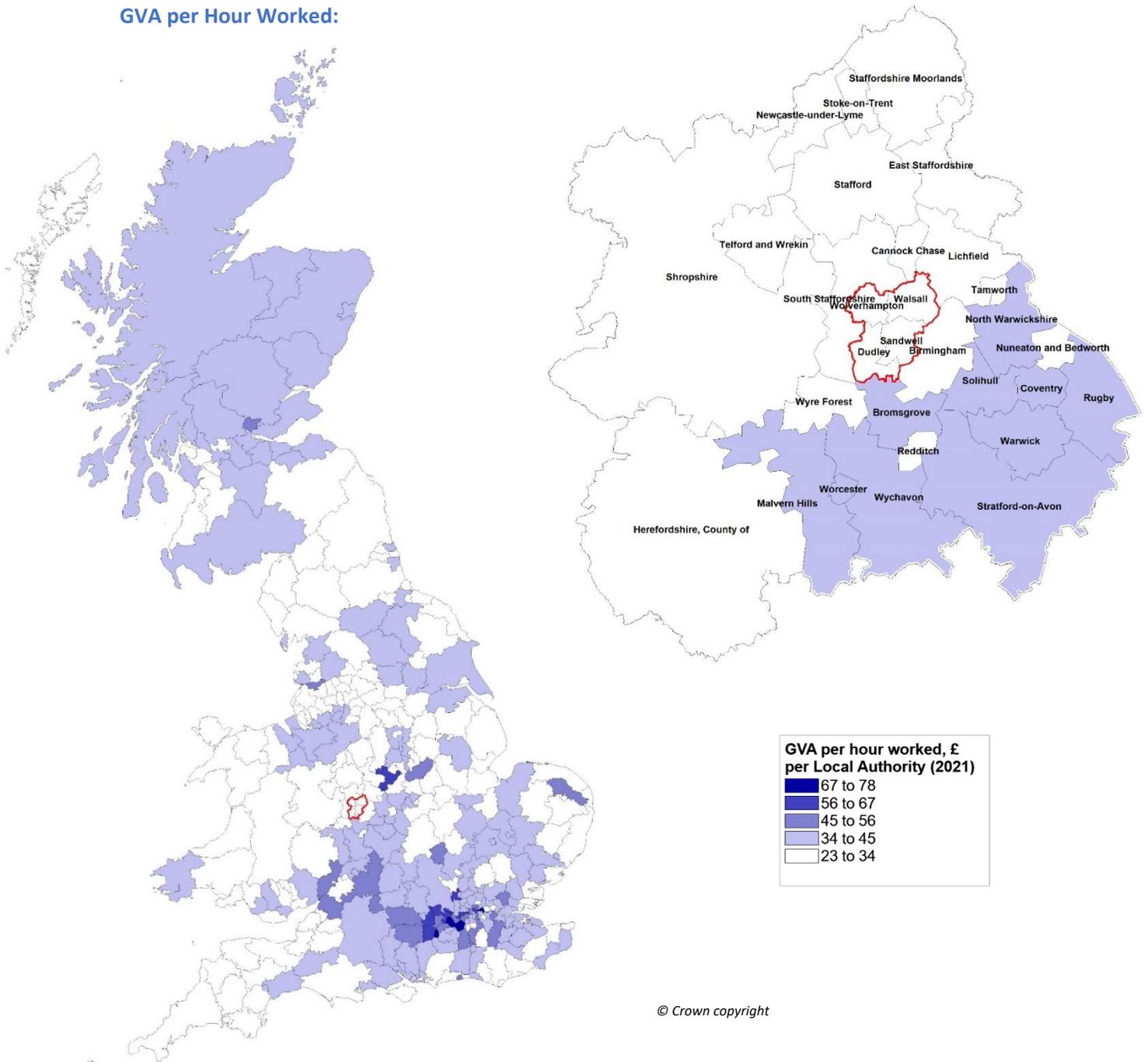
² Office for National Statistics (ONS), Regional economic activity by gross domestic product, released 2023, mid-year population estimates, released 2022, Annual Population Survey, released 2022 and Business Demography released 2022

³ ONS, Regional economic activity by gross domestic product, released 2023

⁴ ONS, Regional economic activity by gross domestic product, released 2023

⁵ ONS, Subregional productivity in the UK, released 2023

GVA per Hour Worked:



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- The **Black Country's economic underperformance is likely a contributing factor to its lower levels of prosperity, standard of living, and higher deprivation - with some communities worse off than others.** This is highlighted in data such as **Gross Disposable Household Income⁶ (GDHI) per person** (which was £15,874 in the Black Country, compared to £22,213 across England overall). Across all ITL3 areas, Sandwell was second lowest at £14,614 and had decreased further between 2020 and 2021. Wolverhampton was 8th lowest at £16,008 and Walsall was 10th lowest at £16,106. Dudley falls behind the national average at £16,893. **These problems persist in the Black Country despite progress in recent years on metrics like productivity.**

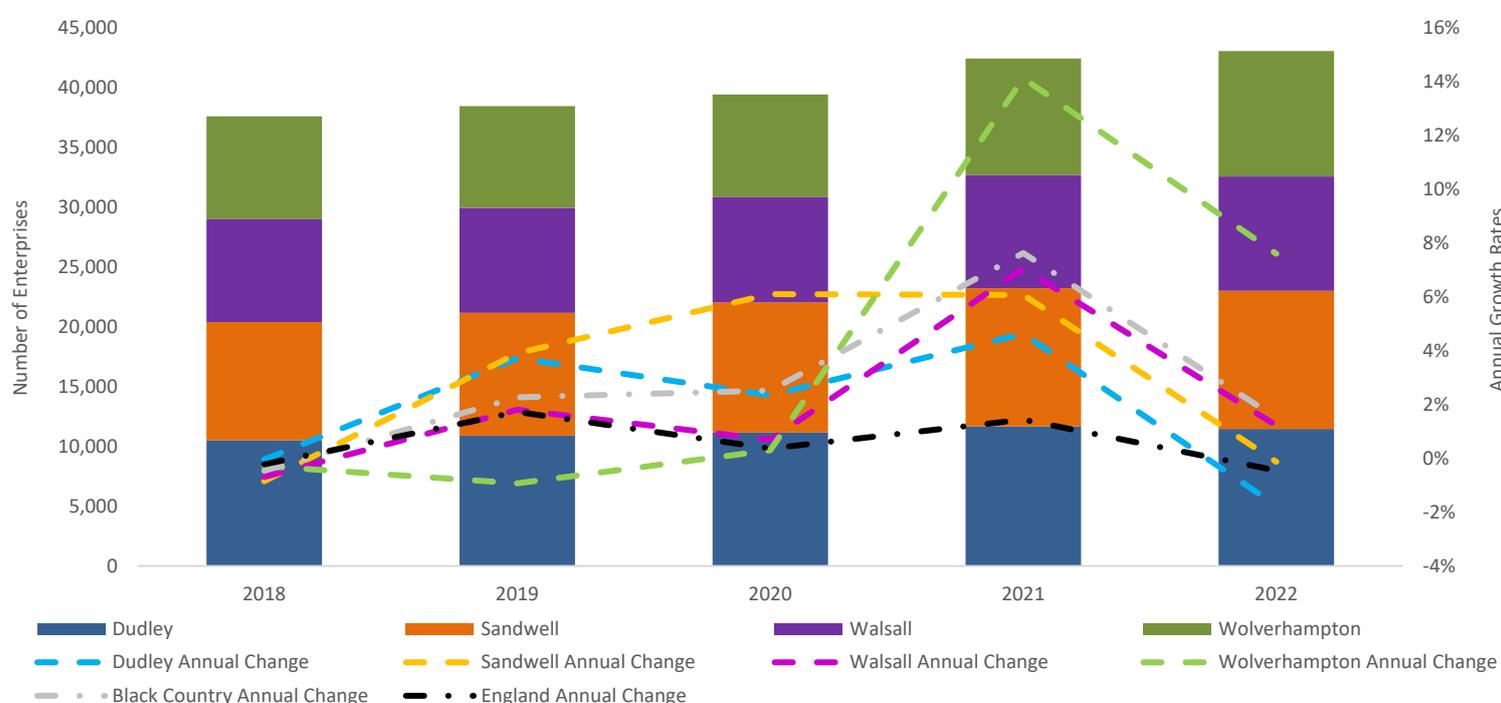
⁶ ONS, Regional gross disposable household income, released 2023 Please note ITL3 refers to an International Territorial Level 3 (which replaced NUTs)

1.2. Business

Strong Business Base but Challenges Remain

- As of 2022, there are **43,015 enterprises**⁷ in the Black Country, with **strong growth between 2021 and 2022** (+1.5% compared with -0.5% across England), driven by growth in Wolverhampton (+7.6%) and Walsall (+1.2%). **Longer-term growth (2017-2022) also shows enterprise growth across the Black Country has been higher than the national average** (+14.0% compared to +2.9%).
- However, overall there are still **too few enterprises** in the Black Country. There were **352 enterprises per 10,000 population for the Black Country area compared to 452 per 10,000 population for England** in 2022. For the Black Country to reach the national average requires an additional 12,259 active enterprises. This is a **challenge across all four local authorities**, with the number of active enterprises per 10,000 population varying slightly from 334 in Walsall to 335 in Sandwell, to 352 in Dudley and 392 in Wolverhampton.

Trends in Active Enterprises:



- Between 2017 and 2022, **enterprise births**⁸ in the Black Country rose by **14.8%**, from **5,055 to 5,805**. This is in contrast to the national decline. **Growth was experienced in all Black Country local authorities:** Dudley by 19.8%, Sandwell by 12.0%, Walsall by 19.2% and Wolverhampton by 10.2%. Wolverhampton had a higher rate than the national average for the rate of enterprise births per 10,000 population (56 compared to 53) in 2022. However, the latest data for between 2021 and 2022, shows a 17.9% decline which reflects the national trend (-7.4%).
- Experimental quarterly data⁹ shows an overall positive picture locally and nationally as **business births were back ahead of business deaths for the first time since Q2 2021**.

⁷ ONS, Business Demography, released 2023

⁸ ONS, Business Demography, released 2023

⁹ ONS, Business demography, quarterly experimental statistics, low-level geographic breakdown, released 2023

Overall Black Country Enterprise Births and Deaths Trends:



- There is an opportunity across the Black Country to **harness innovative activity of the diverse business base locally**, including **female-led businesses, ethnic-minority owned businesses (EMBs) and voluntary and social enterprises (VCSEs)**. 20.3% of companies in the Black Country are female-led, while there are likely to be over 5,000 EMBs and over 6,000 VCSEs.
- Out of 9 defined sectors, as seen in the table below, the Black Country has a **higher than the national proportion in 7 sectors for GVA¹⁰, 4 sectors (and a further 1 matching the England average) in jobs¹¹ and 4 sectors (and a further 1 matching the England average) for enterprises.**

Defined Sectoral Composition:

Sector	Percentage of Black Country GVA	Percentage of England GVA	Percentage of Black Country Jobs	Percentage of England Jobs	Percentage of Black Country Enterprises	Percentage of England Enterprises
Advanced Manufacturing	17.8%	11.3%	15.6%	9.9%	11.3%	11.7%
Building Technologies	6.7%	6.0%	4.7%	4.8%	14.4%	13.9%
Business Services	23.4%	42.4%	16.7%	26.2%	26.6%	37.3%
Environmental Technologies	3.4%	2.7%	1.1%	1.1%	0.6%	0.5%
Health & Wellbeing	13.2%	9.1%	18.1%	15.1%	5.5%	5.5%
Public Sector inc. Education	14.8%	11.7%	14.2%	15.2%	2.8%	4.0%
Retail	13.2%	10.7%	17.5%	14.0%	20.1%	14.8%
Transport Technologies	5.8%	3.2%	7.2%	5.1%	11.5%	4.8%
Visitor Economy	1.8%	2.9%	5.0%	8.5%	7.2%	7.4%

Green indicates the sector is above the national proportion and blue indicates the sector matches the national average.

¹⁰ ONS, Regional economic activity by gross domestic product, released 2023

¹¹ ONS, Business Register and Employment Survey, released 2023

- These sector strengths provide opportunities for all Black Country local authorities including manufacturing, especially metals and materials supply chains. Alongside there are **distinct local sector strengths**¹², for example: Dudley: **automotive and wider manufacturing supply chains, visitor economy, health & wellbeing**. Sandwell: **manufacturing supply chains especially food, metals and automotive, sustainable construction, logistics and transport**. Walsall: **logistics and transport, circular economy principles and automotive/wider manufacturing supply chain**. Wolverhampton: **aerospace, construction (brownfield land), circular economy and services** (for example: accountants, legal, consultants and public services).
- Even during the shocks of recent years there are **genuine examples of innovative** high growth companies across the Black Country, for example: **BJS Distribution** (Walsall), **Stiltz** (Dudley), **Ramfoam** (Sandwell) and **Task Consumer Products** (Wolverhampton).
- There is a **need to continue to focus on attracting innovation investment** to the Black Country, especially given the need to decarbonise and digitise. The Black Country traditionally has a **lower density of high growth/scale-up/high innovation firms**¹³ at **29.3 scaleups per 100,000 population** as of 2021, while innovation spending from government agencies is low, as seen below.

UKRI and Innovate UK Spend per Person, 2020-21¹⁴:



Exporting Issues and Recovery

- The Black Country **exported £3.2bn worth of goods**¹⁵ in 2022, an increase of 2.6% since 2018. Although, there was a mixed picture across the Black Country as Dudley and Walsall increased (+20.1% and +1.5% respectively) while Sandwell and Wolverhampton experienced a decrease (-1.3% and -3.4% respectively).
- **2023 data for goods exports demonstrates a good recovery**, suggesting West Midlands businesses (including those in the Black Country) are better able to manage the new trading relationship with the EU and find other international markets.

¹² EIU analysis of SIC code analysis and The Data City, 2023

¹³ Scaleup Institute, released 2023

¹⁴ UKRI: Geographical distribution of funding (2020-21). Note this relates to direct awards to all organisations including Catapults, which may distort the true picture as funding is spent on supporting businesses directly beyond the organisation's geography.

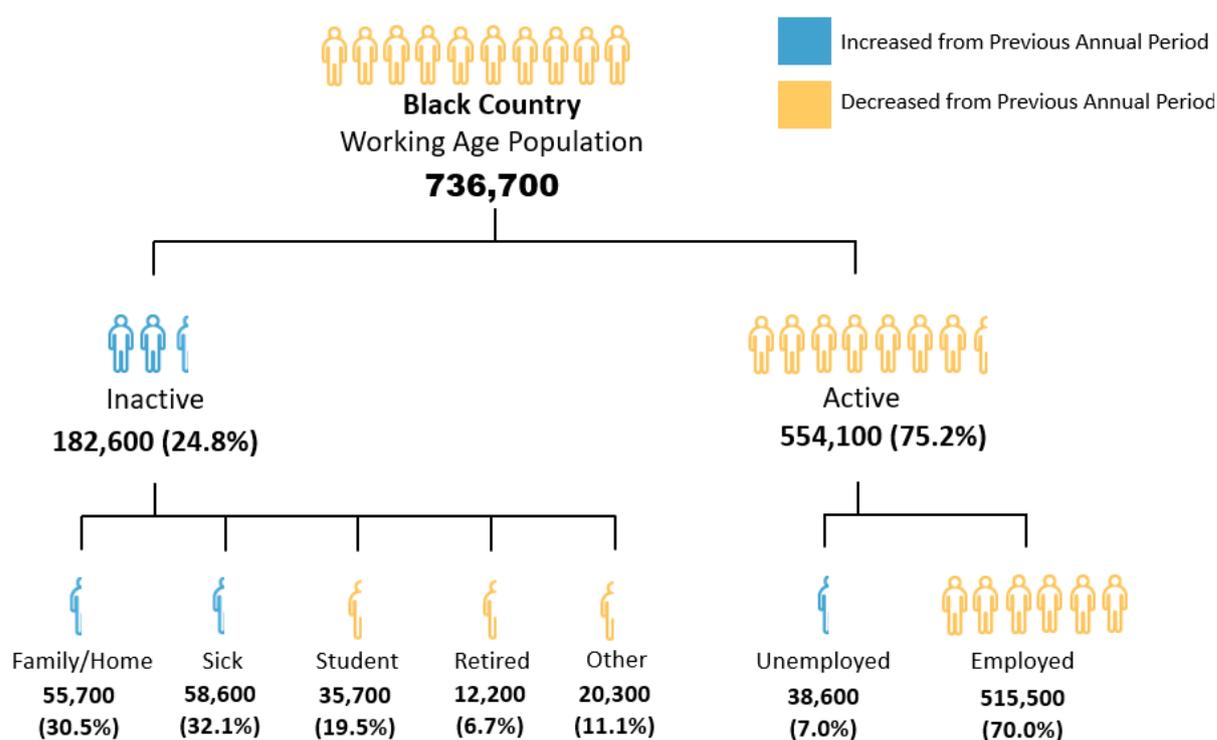
¹⁵ HMRC, UK regional trade in goods statistics disaggregated by smaller geographical areas, 2023

1.3 People

Struggling Labour Market

- **Economic inactivity¹⁶ is a significant issue in the Black Country with nearly a quarter of the population inactive (24.8%),** this is particularly prevalent in Sandwell (29.7%) and Wolverhampton (28.0%). Economic inactivity in the Black Country increased in two local authorities (Wolverhampton by 5.1 percentage points (pp) and in Walsall by 1.1pp) and overall, by 1.0pp while England remained the same level. Economic inactivity in the last year has been heavily influenced by the number of individuals inactive due to **looking after the family/home**, which increased by 7,900 or 16.5%.
- An important contributor to economic inactivity is the number of **people inactive due long-term health problems which increased by 11.3%**. Conversely, the number of people economically inactive due to retirement fell by 3,500 to 6.7%, which was nearly half the rate of the national average (13.0%).

Labour Market Activity, for the Period of July 2022 – June 2023 and the Change Since July 2021 - July 2022:



- **Total claimant¹⁷ numbers remain heightened across the Black Country.** There are approximately 44,000 people claiming benefits looking for work. This equates to 4.6% of the population aged 16 years and over, with the national rate at 2.8%. **Worryingly, youth claimants (aged 16-24) remain stubbornly high with a Black Country rate of 7.1% compared to 4.0% nationally.** Across all local authorities, Wolverhampton had highest youth claimant rates at 8.4%. Sandwell came in 7th highest, followed closely by Walsall in joint 8th place (with Thanet, Burnley and South Tyneside). Dudley came in at 31st highest (with Blaenau Gwent, Mansfield, Doncaster and Peterborough).

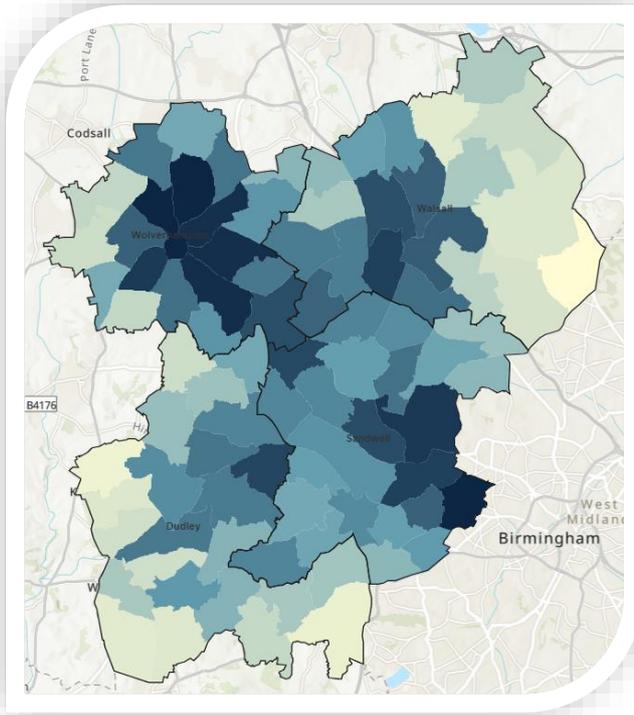
¹⁶ ONS, Annual Population Survey, 2023

¹⁷ ONS/ Department for Work and Pensions, claimant count, released 2023

Black Country Claimant Rates:

Ward claimant rate per population in November 2023 for 16+

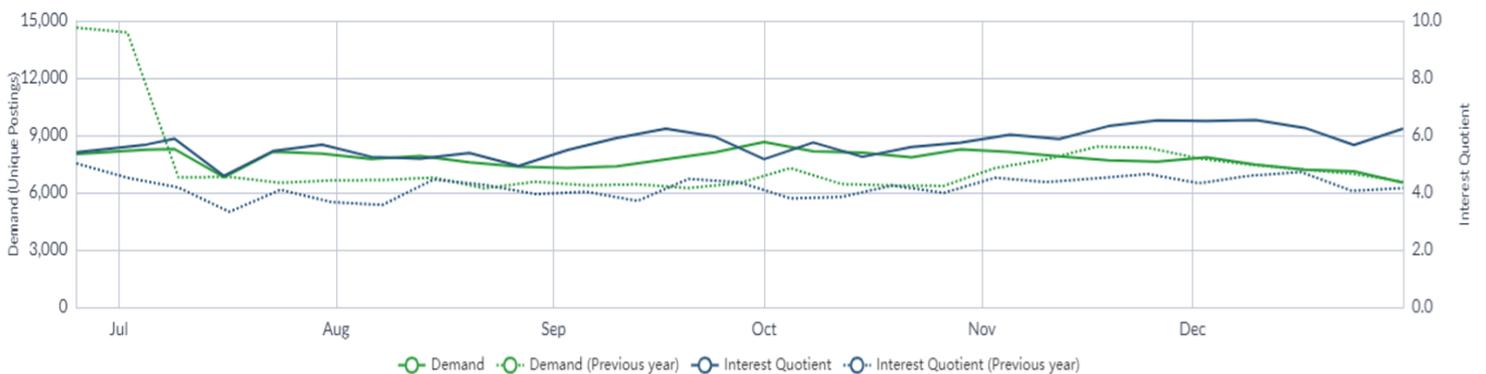
Rate of claimants aged 16+



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- **Over the course of 2022, job postings and vacancies rose to record levels. However, the latest indicators suggest that the demand for labour has begun to cool off.** This could signal a potential inflection point in the labour market; with expectations of lower turnover putting less pressure on employers to recruit new staff, while employees exert greater caution before moving jobs.
- For the Black Country specifically, the headline monthly job posting data¹⁸ remains steady, with postings increasing by 4% in the last 6 months. However, whilst the number of job postings still remain above pre-pandemic levels they have fallen from their peak of 37,046 in March 2022 to 16,107 in December 2023. **Those seeking work - wanting a job (Interest Quotient), remains heightened at 5.7.**

Black Country Job Demand and Interest Quotient Trend:

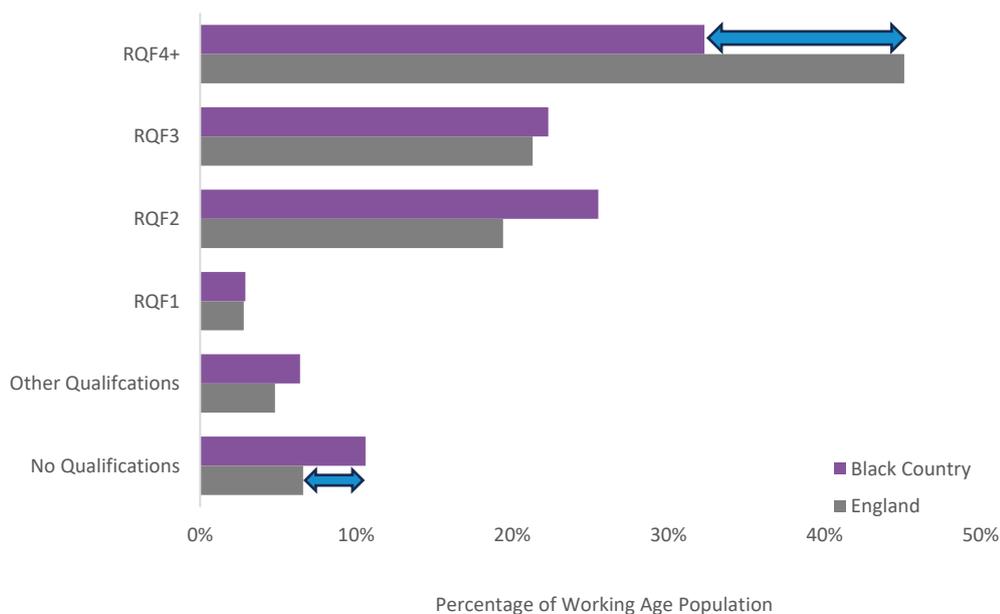


¹⁸ Adzuna Intelligence, 2023. Please note, those seeking work – wanting a job (the Interest Quotient) uses jobseeker data to quantify the level of interest in particular roles.

Early Years and Skills Shortages

- Poor **educational achievement** is one of the strongest predictors of low healthy life expectancy, and a bad educational start in life fuels a trajectory of reduced educational attainment and weaker prospects. Approximately 40% of Black Country pupils do not achieve a good level of development at the end of reception¹⁹.
- The skills²⁰ challenge remains throughout the Black Country, overall **32.3% of residents had RQF4+ qualifications compared to 45.1% nationally** in 2022. Figures are broadly similar for Dudley, Walsall and Wolverhampton (35.1%, 36.3% and 36.1% respectively). Figures drop to under a quarter (23.5%) in Sandwell. **For the Black Country to reach the national level requires 85,612 residents to gain a qualification at Level 4 and above.**
- At the other end of the scale, the percentage of the working age population with **no qualifications in 2022 was 10.6%** - softened due to Dudley being under the national average (6.2% vs 6.6%). However, figures remain high in Walsall (11.2%), Sandwell (11.8%) and Wolverhampton (13.8%). **For the Black Country to reach the national level requires 26,914 residents to gain a qualification.**

Black Country Qualification Profile, 2022:



Apprenticeship Starts and Achievements

- In the 2022/23 academic year, there were **7,710 apprenticeship starts in the Black Country area**. When compared to 2021/22, this was a **decrease of 2.8% (-220), reflecting national trends (-3.5%)**. Across the Black Country local authorities, there were annual decreases in Walsall by 6.8%, in Wolverhampton by 3.6% and in Dudley by 3.0%. Bucking the trend, Sandwell had an annual increase in apprenticeship starts by 1.9%.
- There were also **3,640 apprenticeships achievements in the Black Country area** for the 2022/23 academic year. When compared to 2021/22, there was an increase of 17.4% (+540) with the national growth rate at 18.3%. Across the Black Country local authorities, there were annual increases in Sandwell by 12.5%, Dudley by 18.4%, Wolverhampton by 18.6% and Walsall by 20.5%.

¹⁹ Department for Education, released 2023

²⁰ ONS, Annual Population Survey, released 2023

Overall Increase in Workforce Jobs

- In 2022, there was a **second consecutive year for an increase in total jobs²¹** in the Black Country (reaching 447,000) after the peak seen in 2017 (463,000) and subsequent years of decline to 2020. **The latest annual growth rate for the Black County was at 0.2% (+1,000) compared to a national increase of 2.4%.** Within the Black Country, Wolverhampton increased by 2.8% (to 109,000), Walsall increased by 2.0% (to 102,000) and Sandwell increased by 1.6% (to 126,000). While Dudley experienced an annual decline in jobs by 5.2% (to 110,000).

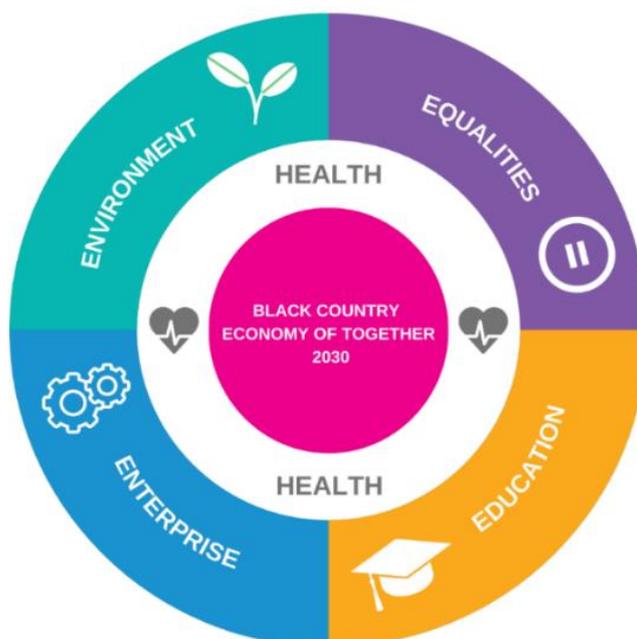
Overall Steady Growth in Resident Wages but Gap Remains

- **In 2023, full time average annual resident earnings²² for the Black Country reached £30,286, an annual increase of 4.7% (+£1,373) compared to an increase of 5.5% nationally.** Black Country earnings were approximately **86.3% of the England average** (£35,100 - a shortfall of £4,814). There was steady growth in percentage terms in Dudley, by 4.9% (or +£1,470) to £31,635; (90.1% of national average). Walsall increased by 7.0% (+£1,974) to £30,295, with earnings at 86.3% of the national average and Sandwell increased by 7.8% (+£2,134) to £29,594, with earnings at 84.3% of the national average. Wolverhampton declined by 0.3% (-£86) to £29,621 (84.4% of the national average).

Economy as a Driver of Health

- The **health of the diverse 1.2 million people** living in the Black Country is dependent on more than the health care services available to them – it is shaped by the social, economic, commercial and environmental conditions in which people live. **80% of an individual's health outcomes' is due to these "wider determinants of health".**

The Black Country 'Economy of Together' Provides a Framework for Transformation:



²¹ ONS, Business Register and Employment Survey, released 2022

²² ONS, Annual Survey of Hours and Earnings, released 2023. Please note, the Black Country figure is an average and is subject to change when official data is released.

1.4. Place

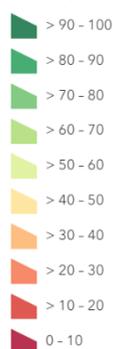
Connected and Built Infrastructure

- The Black Country continues to perform well overall for **broadband connectivity**. As of September 2023, **89.3% of premises had gigabit connectivity²³**, above the UK-wide figure of **76.0%**. **All four areas were above the UK average**, with Wolverhampton 11th highest across 374 local areas at 93.9%. Although, there are **still pockets where connectivity is a real issue** as identified on the map below.

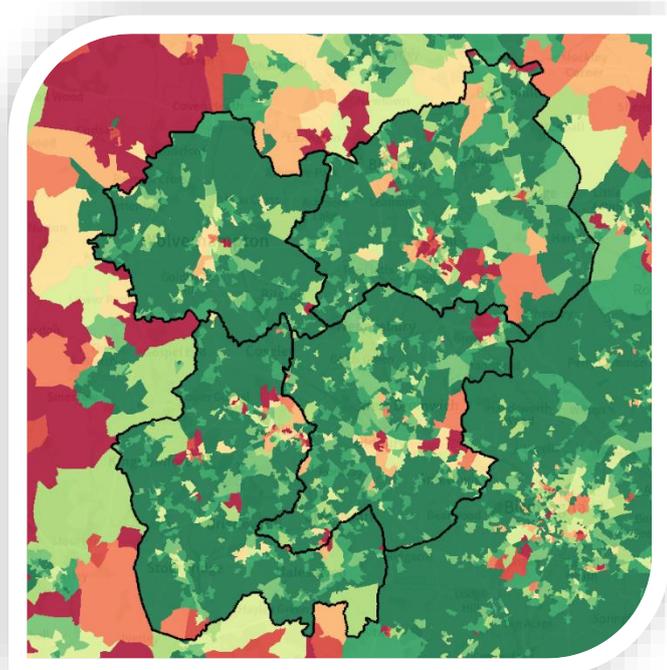
Gigabit Broadband Connectivity:

Ofcom Output Area Fixed Broadband Gigabit Capability (September 2023)

Gigabit broadband availability in September 2023 (% premises)



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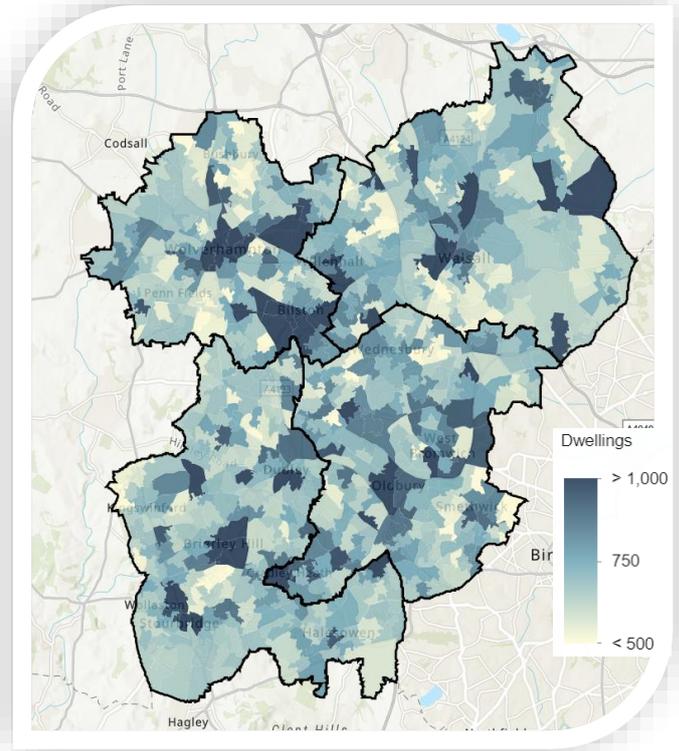
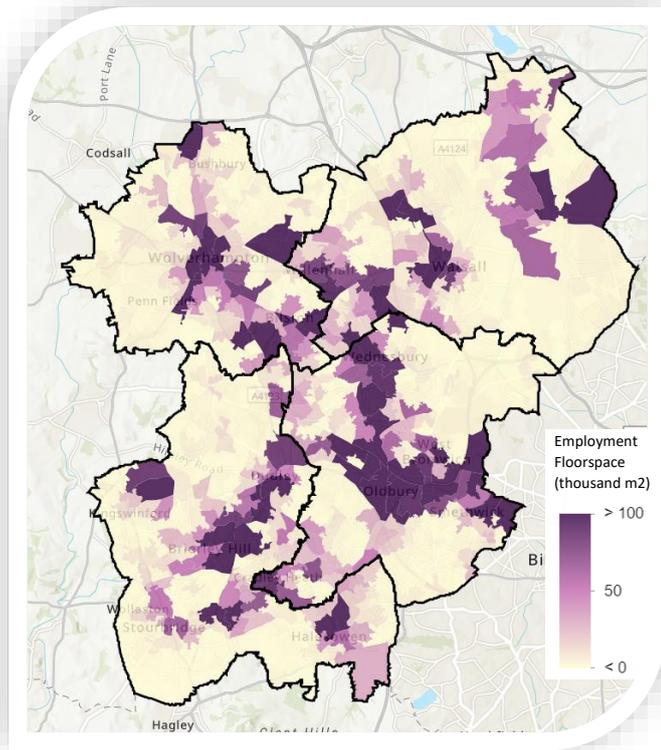
- The **number of dwellings²⁴** continues to increase due to ongoing population demand, reaching a total of **507,500** dwellings in the Black Country as of March 2023. This was an annual increase of 0.4% (+1,910) for the Black Country overall compared to a national increase of 1.0%. At a local authority level there were an additional 370 (+0.3%) dwellings in Walsall (totalling 117,700), an additional 480 (+0.4%) dwellings in Sandwell (totalling 135,740), an additional 490 (+0.3%) dwellings in Dudley (totalling 140,910) and an additional 570 (+0.5%) dwellings in Wolverhampton (totalling 133,200).
- Across the Black Country there was a total of **14.5 million sqm of employment floorspace²⁵**. An **annual increase of 0.2% (+27,000 sqm)** which was above the national growth rate of **0.1%**. Analysing employment floorspace by type, the **majority (73.4%) is dominated by industrial at 10.7 million sqm**. The latest annual change in industrial floorspace for the Black Country shows an **increase of 47,000 sqm**, with Walsall accounting for 25,000 sqm of the increase, followed by Dudley increasing by 15,000 sqm and Wolverhampton increased by 9,000 sqm. Sandwell did experience a decrease of 2,000 sqm but still remained the highest local authority of this floorspace at 3.9 million sqm. **Retail floorspace declined by 18,000 sqm to 2.2 million sqm** and all Black Country local authorities saw declines. **Office floorspace declined in the Black Country by 6,000 sqm to a total of 815,000 sqm**, within the Black Country, Wolverhampton increased by 1,000 sqm while at the other end of the scale in Walsall there were declines of 4,000 sqm.

²³ Ofcom, Connected Nations, released 2023

²⁴ Valuation Office Agency, Council Tax: stock of properties, released 2023

²⁵ Valuation Office Agency, Non-domestic rating: stock of properties collection, released 2023. Please note, change in any employment floorspace is not the absolute figure created it is a net figure.

Total Employment Floorspace (Left) and Current Housing Stock (Right):

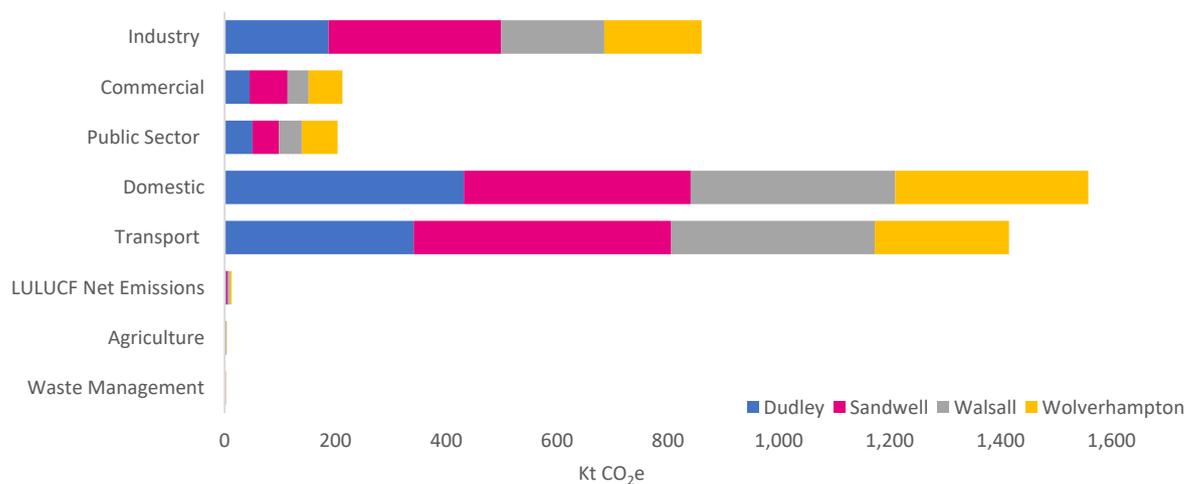


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Net Zero Challenge

- In 2021, total carbon emissions²⁶ were back over 4,000 kt CO₂e (4,269 kt CO₂e) overall in the Black Country area - there is no real surprise to see a slight increases across all four local authorities (and reflecting national trends), as life returned back to pre-pandemic conditions. Longer term (since 2005), emissions have decreased by 42.5% for the Black Country overall; Dudley decreased by 43.2%, Sandwell by 40.5%, Walsall by 42.5% and Wolverhampton by 44.2%. However, there is still a long way to go to reach Net Zero by 2041 – especially in Sandwell (-1,306 kt CO₂e) and Dudley (-1,059 kt CO₂e).

Breakdown of Black Country Carbon Dioxide Emissions, 2021:



²⁶ Department for Energy Security and Net Zero, UK local authority & regional greenhouse gas emissions national statistics, released 2023

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