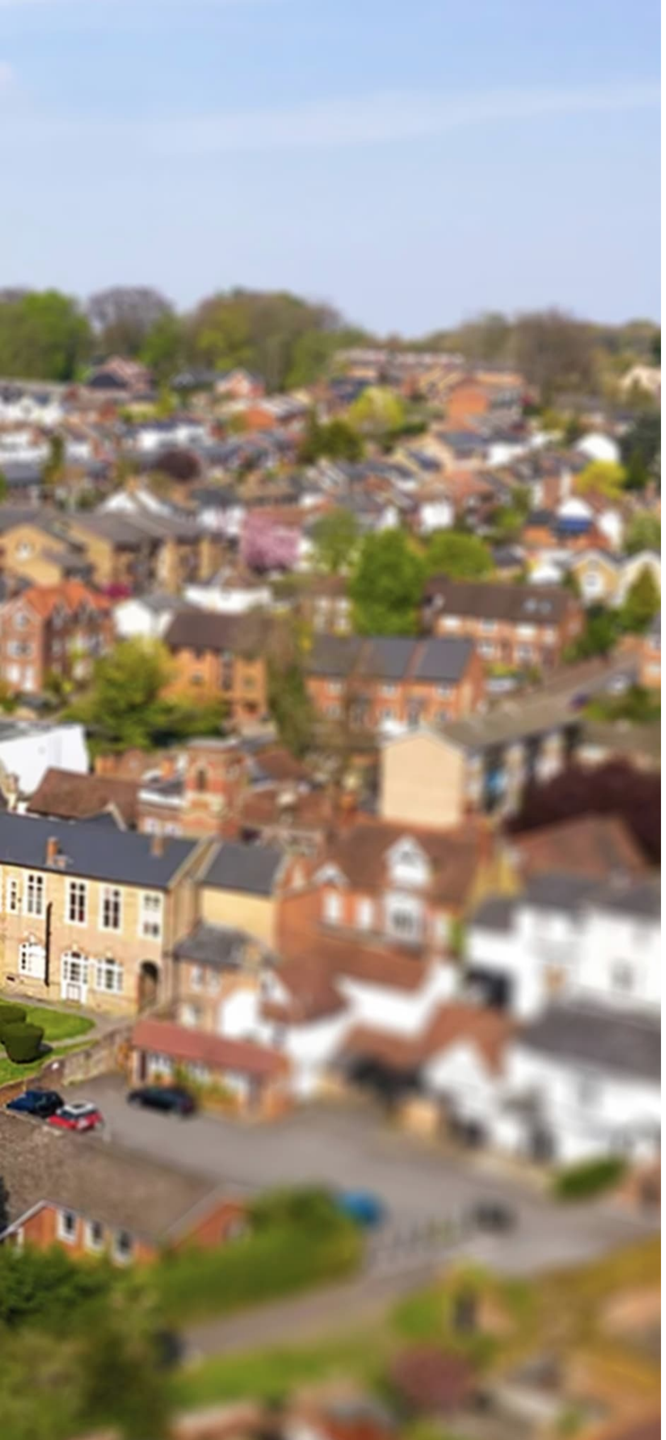
Hemel Hempstead Socio-Economic and Demography Study

Stage 1 Report

May 2024



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1 Introduction

Introduction and Scope

Hemel Garden Communities

Hemel Garden Communities (HGC) is the ambitious programme for the transformation of Hemel Hempstead. Focused on the delivery of exemplar new sustainable neighbourhoods and communities in the north and east of the town, its emerging spatial vision identifies the potential to deliver 10,500 new homes and 8,000 new jobs by 2050. HGC partners include Dacorum Borough Council, St. Albans City and District Council, Hertfordshire County Council, Herts IQ and the Hertfordshire LEP. The four pillars of the vision set out commitment to creating 1) A green network emphasising sustainable, active travel and a much more self-contained place; 2) Integrated neighbourhoods with mixed tenures, genuinely affordable homes and new local centres 3) A self-sustaining economy delivering 6,000 jobs through Herts IQ Enterprise Zone, 2,000 jobs in new local centres, improvements to the town centre and existing local centres, and emphasis on the circular economy, local talent and businesses; 4) Engaged communities who shape their future, emphasising heritage and culture, social value and stewardship.

Designated as a new town in 1947, Hemel Hempstead is one of Hertfordshire's major urban areas and the housing largest growth area in the county, as well as a growing employment centre. The Garden Communities initiative will further reinforce these roles, providing the opportunity for further, sustainable growth, the potential to bring many new residents, jobs and businesses to the area, and to drive forward much needed regeneration and renewal in the town centre, local centres and employment areas.

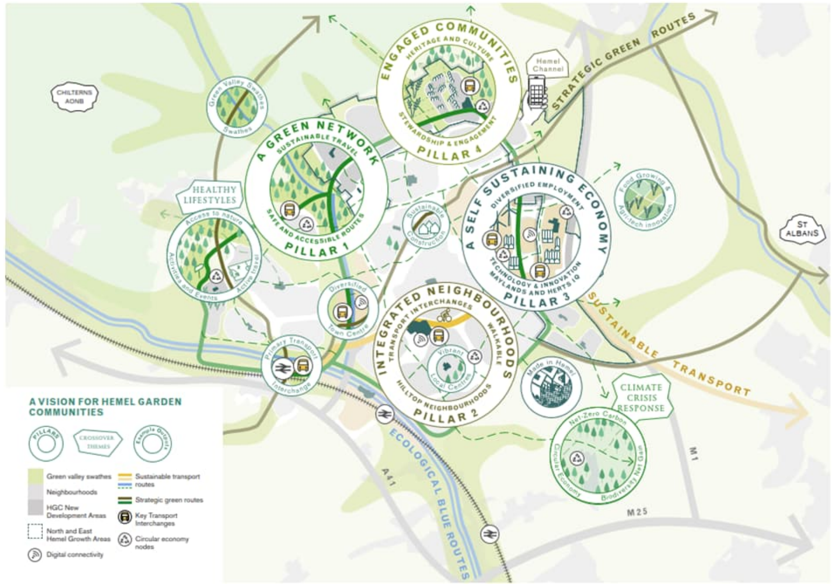
Scope

Hatch was commissioned to produce a socio-economic and demography study for HGC. The study will feed into HGC's inputs into the Dacorum Borough Council and St Albans City and District Local Plans, and is intended to help guide investment planning and management. It was agreed with the client team that the study would focus on strengths, weaknesses and opportunities that would inform HGC's ongoing work on an economic vision and narrative for Hemel Hempstead.

The priority for HGC was to understand the existing socio-economic and demographic characteristics of the town, and the implications of opportunities for growth. The study captures these characteristics in three main themes:

- **People:** Focusing on key population characteristics and how these are changing, including the resident workforce.
- **Prosperity:** Covering employment, businesses, income and earnings.
- **Place**: Bringing together evidence on the spatial features of the town, its property market etc.

The study concludes with key findings and recommendations for the ongoing work on the economic vision for Hemel Hempstead.



Source: HGC Spatial Vision (2021)

Context for the Study

The socio-economic and demographic study is part of a substantial and growing evidence base that is expected both to align with and help shape the ongoing development and delivery of strategies and plans across Hertfordshire.

South West Hertfordshire 2050

South West Hertfordshire's local authorities (Dacorum Borough, Hertsmere Borough, St. Albans City and District, Three Rivers District, Watford Borough and Hertfordshire County Councils) are preparing a Joint Strategic Plan (JSP) to 2050, the vision from which is:

South West Herts will realise its full potential of being globally connected, nationally recognised and locally cherished. Known for its creative spirit, collaborative working and willingness to accept positive change, it will be a place where sustainable growth provides a better and healthy future for both people and the environment'.

Six pillars provide the framework for the JSP and for planning and investment strategies for the future of the wider area. They are strongly aligned with HGC's strategic themes and the contribution that its delivery could make to the area's economy, communities and place-making:

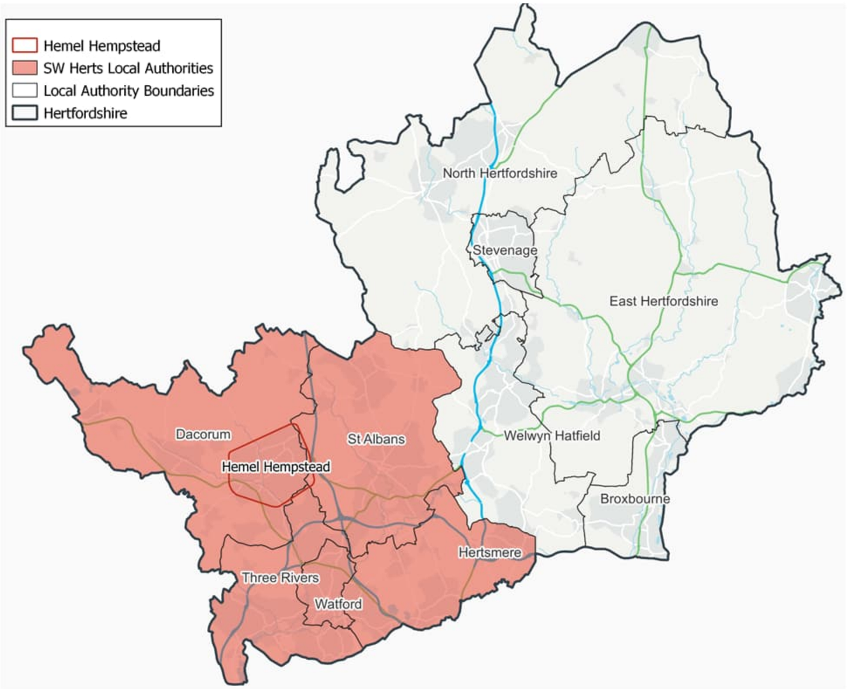
- Living green a healthy, natural environment
- Growing opportunities to work locally
- Living in healthy, thriving local communities
- Moving easily in well-connected places
- Building homes and places that people are proud of
- Delivering robust and sustainable infrastructure

The objectives identified for each of the six pillars have also shaped the focus of this report (People, Prosperity and Place). Amongst the many issues it covers are Hemel's current and future economy and key sectors, changing working patterns, deprivation, health and wellbeing, sustainable transport and mobility and green infrastructure.

Hertfordshire Growth Board Vision and Missions

Hertfordshire Growth Board's vision for growth and the missions it establishes centre on commitment to creating a vibrant, resilient and successful economy, healthy, safe, inclusive and better-connected communities, and responsible growth. The six missions for the county encompass economic growth, skills, employment and economic infrastructure, the the digital transition, sustainable transport and the need to tackle climate change and provide environmental resilience, emphasis on health and wellbeing, and the delivery of good quality homes that meet the full range of needs for market, affordable and specialist housing.

Much of the detail of this report reflects the specific issues that feature in HGB's missions. Hemel Garden Communities, and housing and economic growth in Hemel Hempstead, over the next 30 years have the potential to make a significant contribution to achieving these missions. The report points to both the opportunities and challenges for Hemel to deliver this contribution.



Context for the Study

Alongside the strategic framework provided by the South West Hertfordshire 2050 vision and HGB's vision and missions, the study is intended to complement several established and emerging strategies and plans across Hemel Hempstead, Dacorum and St. Albans City and District.

Local Plans

St. Albans City and District Local Plan reached its Reg. 18 consultation stage in October 2023. Hemel Hempstead, and particularly East Hemel and HGC feature prominently in the Local Plan's strategy and policies relating both to housing delivery and the substantial contribution that the East Hemel employment area could make in meeting future growth needs. Dacorum Borough's Local Plan also reached its Reg. 18 consultation stage in October 2023 with the publication of a Revised Strategy for Growth. This strategy points to the objective for the transformation of Hemel Hempstead, including significant housing growth and the related delivery of new social and community infrastructure, town centre regeneration and sustainable transport and mobility.

The evidence for Hemel Hempstead presented in this report will form part of the substantial suite of information that forms the evidence base for the Local Plans.

Herts Innovation Quarter

Herts IQ was established as an Envirotech enterprise zone in 2015. Its sectors focus now includes agritech, offsite manufacturing (construction), smart construction, logistics and distribution. Innovation, education and skills were central to Herts IQ's objectives, with key objectives including increasing productivity, attracting and retaining skills and talent, and supporting new business formation.

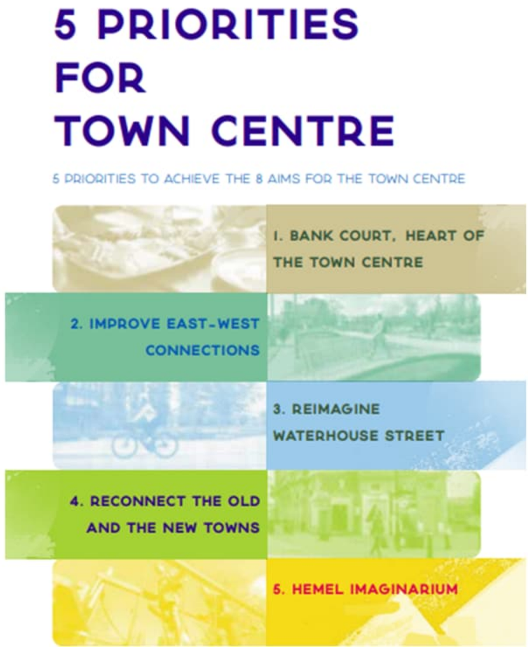
With a commitment to deliver 3 million sq ft of commercial floorspace, progress to date has revolved around the successful addition of new logistics and distribution floorspace at Maylands and the delivery of new offices, labs and innovation space at Rothamsted's Russell Building. The potential for future employment development in East Hemel to deliver Herts IQ priorities for knowledge-intensive businesses and jobs, and to support priority sectors is recognized in this report.

Hemel Town Centre Vision

Dacorum Borough Council and Hemel Place Board are committed to the regeneration and improvement of the town centre. The Town Centre vision responds to significant challenges, highlighted in this study, relating to the vitality and sustainability of town centre retail and leisure, and the need to tackle these challenges on multiple fronts including strengthening and diversifying its leisure offer, taking opportunities for residential intensification, improving its connectivity, and investing in public spaces and green infrastructure.

Maylands Masterplan

As one of Hertfordshire's largest employment areas, work on a Masterplan for Maylands, the emerging Maylands Masterplan draft evidence recognises the appetite to attract more 'aspirational' economic activity, the strengths of the wider area in sectors including agritech, environmental technology and life sciences and potential long-term opportunities for Maylands Gateway to contribute to increasing R&D activity in the area. The area will be a key contributor to Hemel's future economic growth and the quality and range of employment it delivers to support the town's transformation.



Study Area and Data

Study Area

It was agreed with the client team that the primary focus of the analysis for Hemel Hempstead would be an 'area of influence' used by Hemel Garden Communities in its emerging vision. This is shown on the adjacent map. The report refers to this area as Hemel Hempstead.

For data analysis purposes, Hatch identified a best fit for that area of influence (AoI) using lower layer super output areas (LSOA) which are the common data unit available for a wide range of socio-economic indicators. To ensure that this study area took account of East Hemel Hempstead, a major employment growth opportunity area, and settlements close to but not part of the urban area, the boundary was extended into the locations in the St. Albans City and District local authority area that are within the AoI.

It should also be noted that, throughout this report, where reference is made to St Albans, it is always referring to the St Albans City and District Council local authority area unless otherwise stated.

Data Limitations

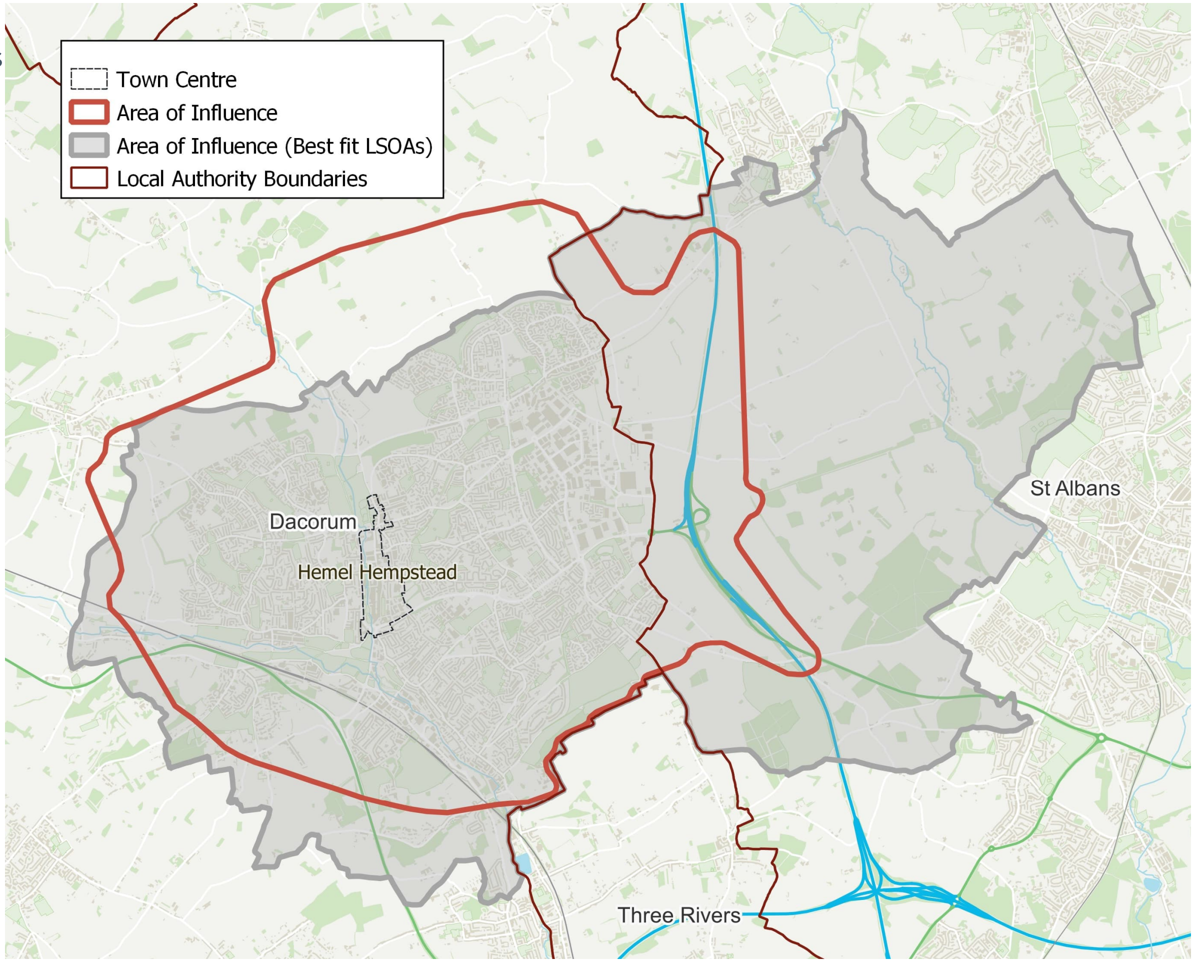
Wherever possible, the study uses the most up-to-date data available for Hemel Hempstead and the AoI. There are some limitations in data for small areas (ie localities within a local authority area) which are highlighted in the report.

It should be noted also that the 2021 Census was carried out in exceptional circumstances during the Covid-19 pandemic. Whilst the ONS sought Census responses that reflected residents' normal activities, the results reflect conditions during the pandemic including:

- Substantial increases in home and hybrid working
- Much higher than typical levels of unemployment and business failure, and large numbers of people who were temporarily 'furloughed'
- Constraints on people travelling to education, services and leisure

Where there are apparent Covid-19 effects on the data, Hatch comments on these effects in the report. However, the Census remains the most comprehensive and robust source of evidence available for many socio-economic indicators and it is therefore extensively used in the report.

Hemel Hempstead, HGC Area of Influence



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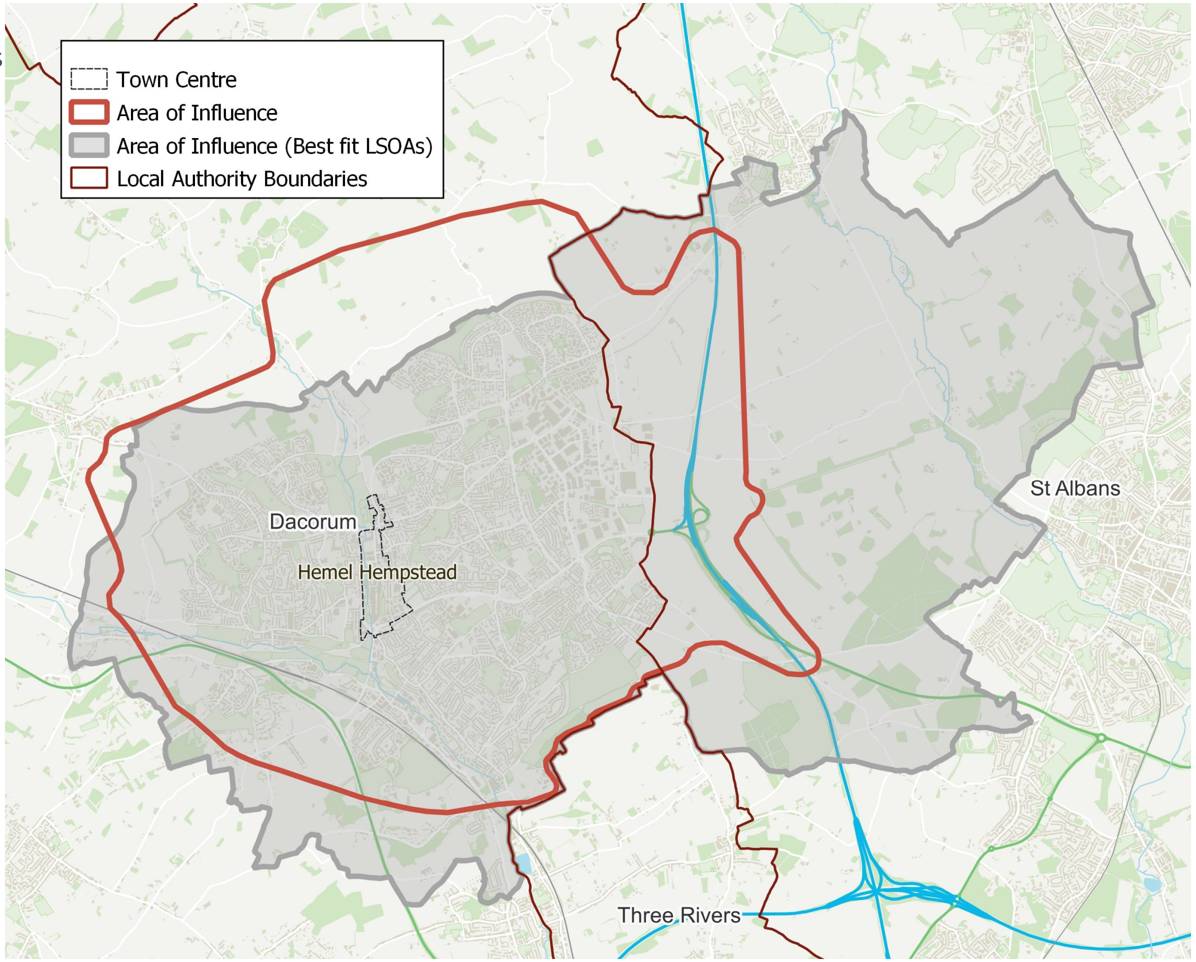


2 Data

People

People | Population and Age Profile

Key Points

- Current population of 98,700 (2021) in study area.
- Slightly higher proportion of 16-64 year olds (64%) compared to Dacorum, St. Albans, Hertfordshire and England but differences are not substantial
- However, higher proportion of 25-34 year olds in Hemel Hempstead
- Population slightly more diverse than that of Dacorum, but on par with Hertfordshire and national profile

The age profile of the town's population is in line with that expected of a larger town, being younger than that of the wider area in which it is located.

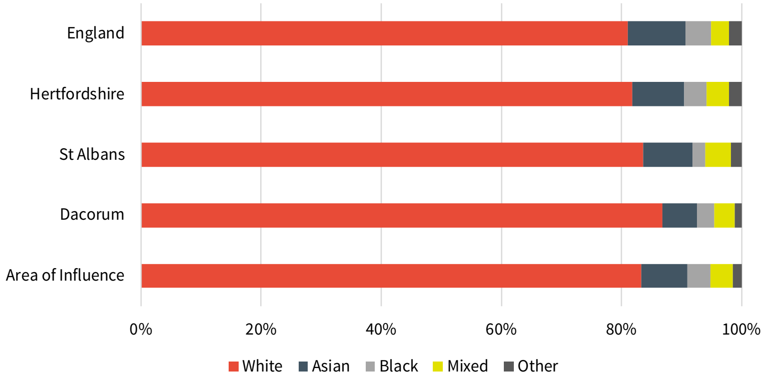
The higher proportion of younger adults (25-34) may be attracted by factors including the availability of housing (and lower cost housing), and good accessibility to employment in the town, South West Hertfordshire and London. Both factors would be expected to attract younger working age adults to the area.

This younger adult population appears to be concentrated in areas around the town centre and in south Hemel, which have significantly higher proportions of 25-34 year old residents, reinforcing suggestion that availability and cost of housing likely to be a key factor. Analysis later in this report suggests that the availability of more affordable housing – both for rent and sale – is higher in central areas of the town and this is consistent with the distribution of younger adults.

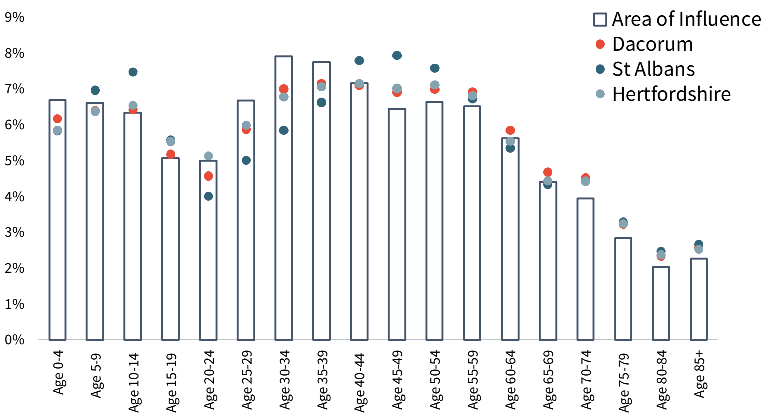
Population by Age Group, 2021

	0-15	16-64	65+	16-24	25-34
Hemel Hempstead	21%	64%	16%	9%	15%
Dacorum	20%	62%	17%	9%	13%
St Albans	22%	61%	17%	8%	11%
Hertfordshire	20%	63%	17%	9%	13%
England	19%	63%	18%	11%	14%

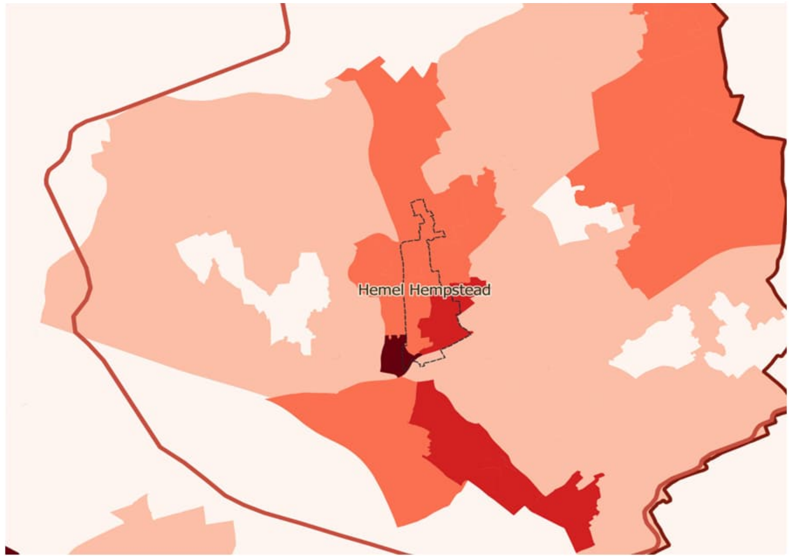
Ethnicity, 2021



Detailed Age Profile, 2021



Percentage of Resident Population Aged 25-34



Source: Census, 2021

People | Recent Population Growth

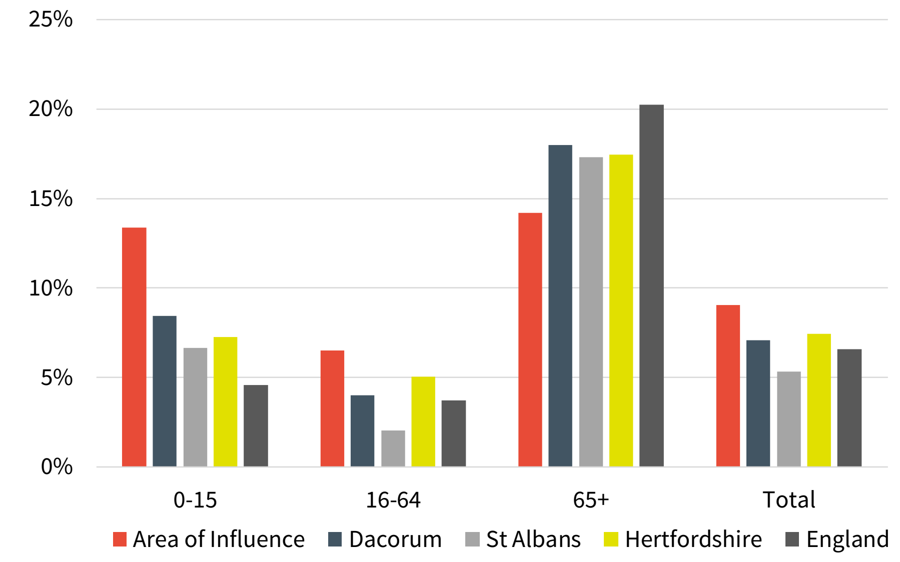
Key Points

- Faster population growth in Hemel Hempstead over last 10 years
- Strongest population growth in over 65 population, but Hemel Hempstead also saw higher growth than comparators in children 0-15 and 16-64 population
- Significantly higher growth in 30-44 population, key cohort in resident workforce, but largest fall in 16-24 year olds
- Hemel Hempstead has lowest old age dependency ratio, and highest ratio of 16-64 residents to over 65s

There is a positive recent story of population growth for Hemel Hempstead, with an increase in working age residents (16-64) that is higher than that of the wider area and England. This suggests growth in the resident working population at a time when the UK's population is ageing. The apparent 'loss' of 16-24 year olds is likely to reflect in part the numbers of young people leaving the town for higher education.

This is underlined by the old age dependency ratio data, which shows that Hemel Hempstead has a significantly higher ratio of working age residents to its over 65 population. This is a marker of economic and social resilience, with working age adults key to ensuring that older residents are supported (e.g. through a workforce in the health and social care sectors), through family support, and through taxation effects.

% Population Growth by Age, 2011-2021



Source: Census, 2021

Old Age Dependency Ratios, 2021

	Dependency Ratio	Residents 16-64: Over 65s
Hemel Hempstead	**244**	**4.1**
Dacorum	279	3.6
St. Albans	282	3.5
Hertfordshire	271	3.7
England	292	3.4

Dependency Ratio measures number of people aged over 65 per 1,000 people aged 16-64
Source: Census, 2021

% Working Age Population Growth by Age Band, 2011-21

	16-24	25-29	30-44	45-59	60--64
Hemel Hempstead	**-12%**	**4%**	**16%**	**5%**	**16%**
Dacorum	-10%	5%	7%	6%	8%
St Albans	-3%	-5%	-7%	12%	6%
Hertfordshire	-6%	3%	4%	12%	6%
England	-5%	2%	4%	10%	3%

Source: Census, 2021

People | Future Growth

Key Points

- Garden Town status and HGC housing growth will contribute to sustained long-term population growth in Hemel Hempstead
- By 2050 Hemel could see nearly 20,000 additional homes accommodating a population of c. 49,000
- HGC sites could accommodate 26,000 residents
- High average household size for HGC developments (2.44) consistent with new build homes which to have much higher proportion of working age residents and families

High level analysis of the housing delivery capacity of HGC sites points to the potential to deliver 10,500 high quality, mixed tenure homes. An estimated population of 26,000 with an average household size of 2.44 (the Census 2021 figure for Dacorum) The tendency for new housing to be more likely to be occupied by younger, family households could give a higher population yield.

Beyond new communities created on HGC sites, further housing delivery on sites across Hemel Hempstead will add 9,400 homes with the potential to accommodate 23,000 residents by 2041.

In total, Hemel Hempstead's population could increase to around 150,000 (+50%) over the next 25 years.

Not all of the homes will be occupied by residents who are new to Hemel. However, with the town set to generate 10,000 new jobs and the intent for Hemel Garden Town to be a growth driver for Hertfordshire, it is likely to attract a substantial number of new residents who would be additions to the town's population. Assuming 50% were new residents, this would mean around 25,000 additional residents living in the town, being part of its resident workforce, spending leisure time and money in Hemel and contributing to its long-term economic sustainability.

Future Housing and Population Growth to 2050

10,500	Potential housing delivery on Hemel Garden Communities sites
26,000	Estimated population yield from HGC housing
2.4	Implied average household size for HGC homes
3	Three new large and medium sized local centres to provide services and facilities to new residents, with an additional three smaller local centres
19,900	Additional homes across Hemel Hempstead to 2050
49,000	Accommodating an estimated residents 48,000 residents (@average 2.4 per household)

People | Resident Workforce

Key Points

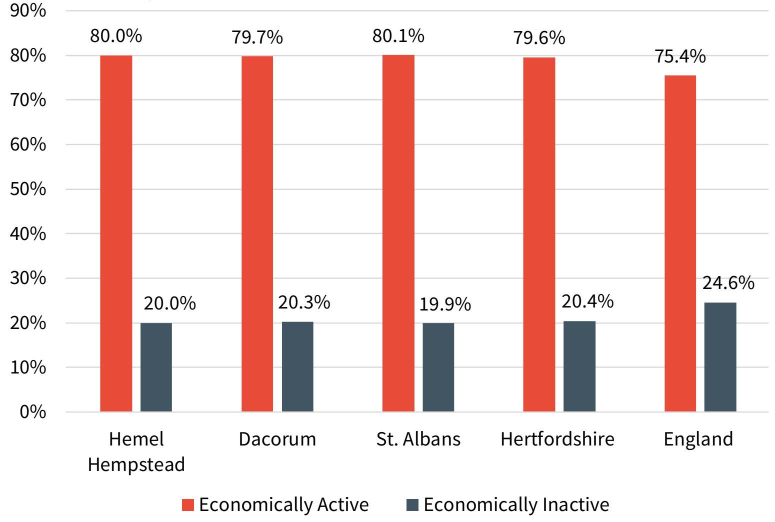
- Economic activity rate in Hemel Hempstead 80% in 2021 Census, on par with wider area averages
- 2,315 unemployment claimants in Hemel Hempstead February 2024
- Concentrations of claimants around Hemel Hempstead town centre, an issue discussed elsewhere in report

Economic activity rates for 16-64 year olds residents are higher than England average across Hertfordshire, although the 2021 Census is likely to have resulted in a larger proportion of people who were economically inactive temporarily than normal. High rates are to be expected in a dynamic area of the UK economy close to London and with a substantial range of accessible employment available.

Unemployment data shows that Hemel Hempstead and Dacorum saw unemployment claimant numbers rise more sharply than other areas during the pandemic, and fall more slowly as economic conditions improved. In part, this reflects an employment mix in the town in which sectors more vulnerable to the effects of Covid-19 restrictions (e.g. retail, wholesale) are prominent.

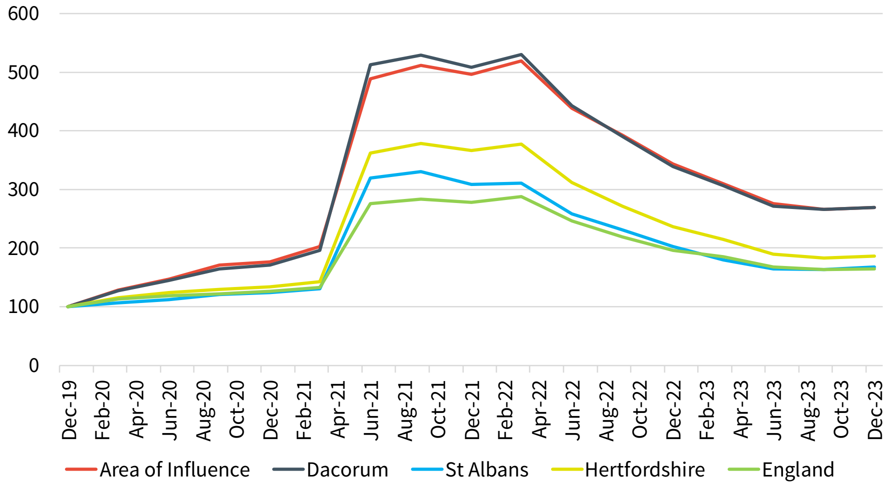
There are concentrations of unemployed residents in and around the town centre, consistent with data in this report showing that communities in these locations are more likely to have lower qualification levels, higher levels of deprivation and face more health and wellbeing challenges which contribute to unemployment and economic inactivity.

Economic Activity and Inactivity Rates, 16-64 Residents, 2021



Source: Census, 2021

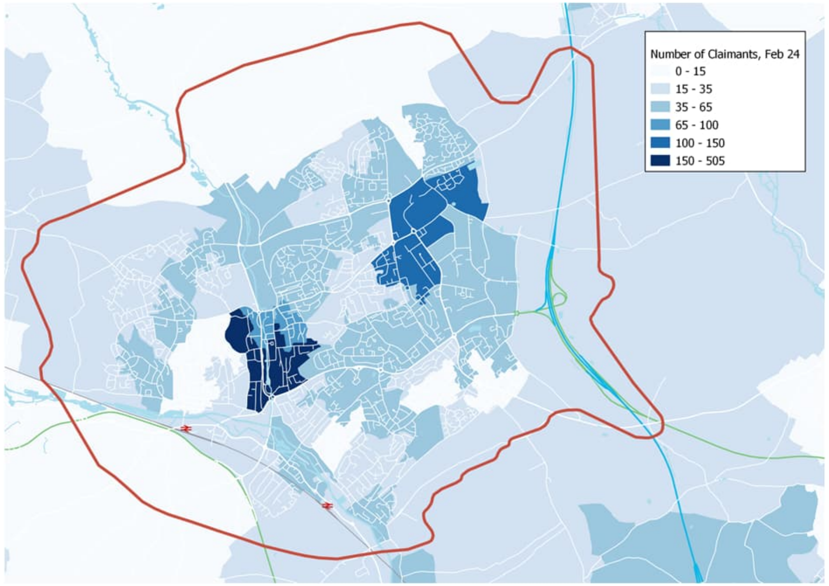
Change in Unemployment Claimants 2019-2024, Index=100



Source: Office for National Statistics, Claimant Count, 2024

2,315	Current number of 16-64 year old unemployment benefit claimants in Hemel Hempstead, February 2024
385	18-24 year old residents claiming unemployment benefit, 17% of all claimants
470	50-64 year olds claiming unemployment benefit, 20% of the total

Locations of Unemployment Claimants February 2024



Source: Office for National Statistics, Claimant Count, 2024

People | Occupations

Key Points

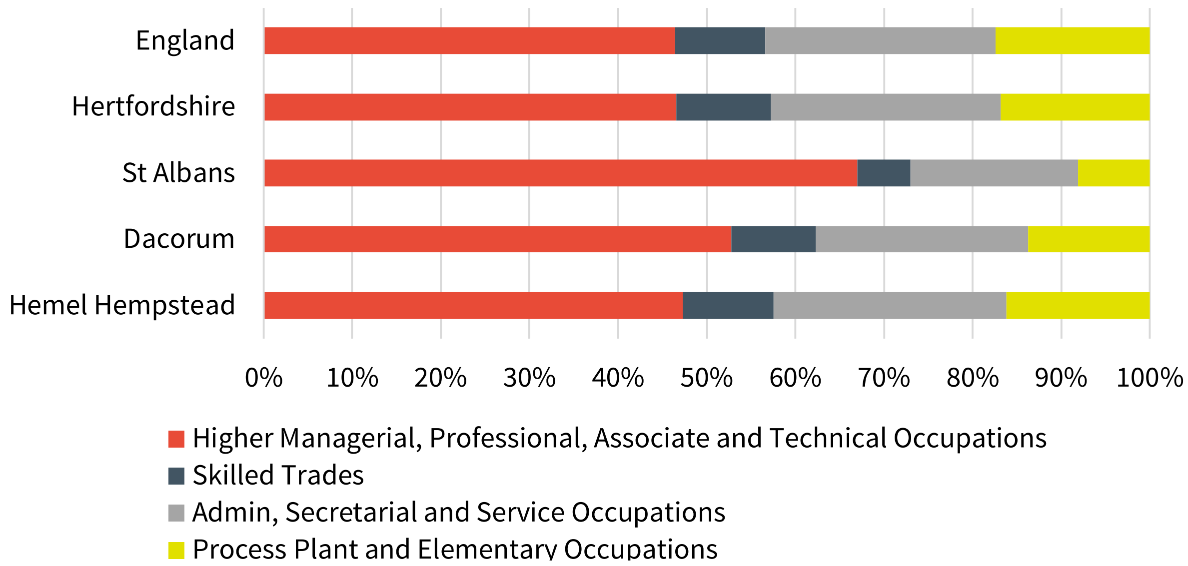
- Hemel Hempstead aligned with Hertfordshire and England in % of residents in higher skilled, higher paid occupations.
- St. Albans has significantly higher % of residents in higher level occupations, and Hemel Hempstead slightly lags Dacorum
- Significant differences between proportion of Dacorum residents in higher level occupations compared with the proportion of workplace jobs in those occupations

Resident occupations data suggests that Hemel Hempstead is on par with Hertfordshire and England in the proportion of its residents in higher managerial, professional, association professional and technical occupations. These are typically associated with higher paid and higher skilled employment. The town however has a slightly lower percentage of residents in these occupations than Dacorum borough, and a much lower proportion than St. Albans. This is very likely to reflect choices about places to live, with people in higher paid occupations exercising greater choice about living arrangements, and more likely to live in higher priced housing markets (e.g. St. Albans) and rural areas. Good access to London's labour market is also a factor here, with the capital offering a much larger number and range of such employment than Hertfordshire.

A comparison of resident and workplace occupations data reinforces the evidence that residents in higher paid and higher skilled occupations are more likely to travel outside Dacorum to work. There is a significant difference between the proportion of residents in higher managerial and professional occupations (54%) than the proportion of those occupations in workplace jobs in the borough (42%).

The occupations data supports the priority attached in vision statements for Hemel Hempstead to attracting a wider range of employment in higher managerial, professional and higher skilled occupations if the town is to retain more of its working residents each day.

Resident Occupations Profile, 2021



Source: Census, 2021

Comparison of Workplace and Resident Occupations, Dacorum 2023

	Resident Occupations	Workplace Occupations
Managers, Directors, Senior Officials	23%	18%
Professional Occupations	31%	24%
Association Professional & Technical Occupations	11%	15%
Elementary Occupations	8%	5%

Source: Annual Population Survey, 2024
Note: Data not available for Hemel Hempstead localities

HATCH

People | Qualifications

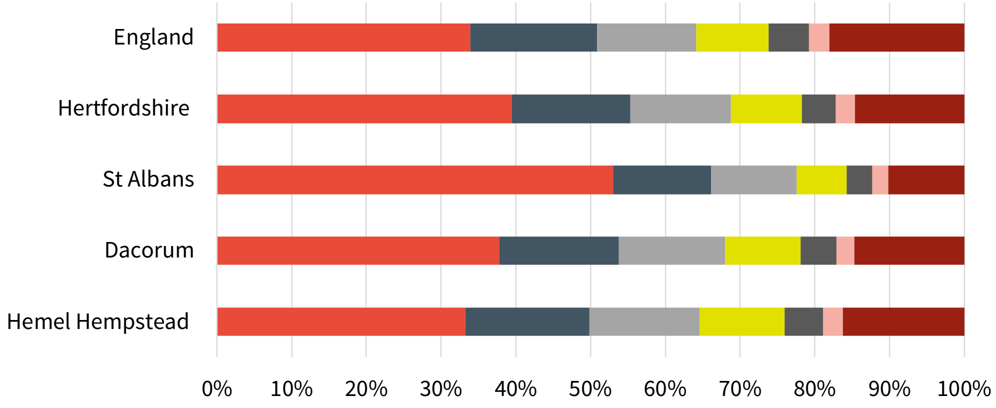
Key Points

- Lower proportion of residents with degree level equivalent or higher qualifications in Hemel Hempstead – 6 percentage points lower than Hertfordshire and 20 percentage points lower than St. Albans
- Higher proportion of residents with no qualifications than Hertfordshire, Dacorum and St. Albans
- Increase in percentage of residents with higher level qualifications between 2011 and 2021, both degree level or higher and NVQ Level 3

Qualifications data paints a mixed picture for Hemel Hempstead. The town lags behind most of the comparators with the exception of England on the proportion of residents qualified to degree level or higher. However, Hemel saw a significant increase of 8 percentage points in residents with National Vocational Qualification (NVQ) Level 4+ qualifications between 2011 and 2021, with an increase also in the percentage with NVQ Level 3 qualifications.

Conversely, Hemel Hempstead has a higher proportion (16%) of residents with no qualifications compared with other areas. Again, there are positive signs in that there was a 5 percentage point reduction in the proportion of residents without qualifications between 2011 and 2021.

Highest Qualification Level of Residents, 2021



- Level 4 qualifications or above
- Level 3 qualifications
- Level 2 qualifications
- Level 1 and entry level qualifications
- Apprenticeship
- Other qualifications
- No qualifications

Source: ONS Census, 2021

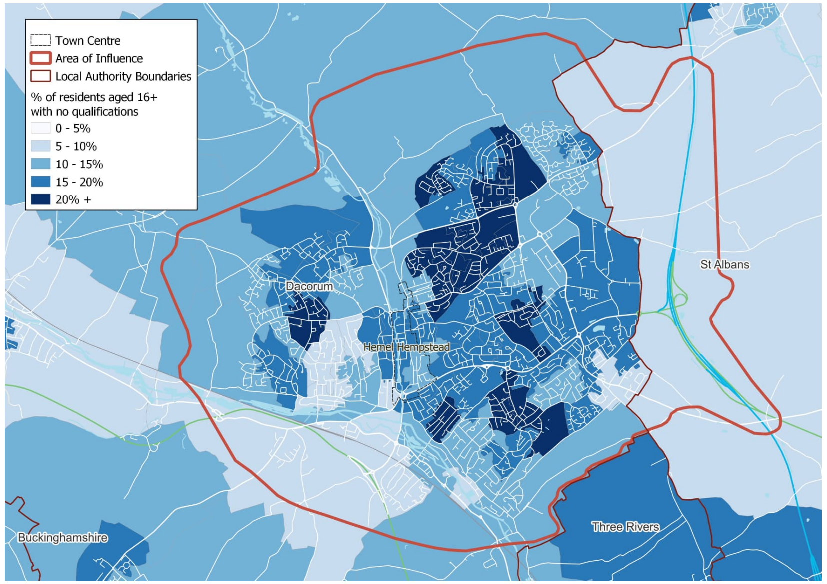
Level 2	GSCE, level 2 NVQ etc.
Level 3	A Level, Advanced apprenticeship, AS Level, Access to HE diploma etc.
Level 4	Higher apprenticeship, certificate of higher education (CertHE). Higher than Level 4 includes degree level qualifications and above

Change in Resident Qualification Levels, 2011-21

- Increase in residents with degree level qualifications (+8 % points)
- Increase in residents with NVQ Level 3 equivalent (+5 % points)
- Little change in % with apprenticeship qualifications (+1% point)
- Fall in number of residents with NVQ Level 1 qualification (-5% points)
- Fall in number of people without qualifications (-5 % points)

Source: ONS Census, 2021

Residents with No Qualifications, Hemel Hempstead, 2021



People | Commuting

Key Points

- Census data indicates the majority (ie 50%+) of Hemel Hempstead working residents appear to live and work in the town, including those working at home or with no fixed place of work (so likely to be home-based at least in part)
- London is an important destination for Hemel Hempstead residents, with 5,100 travelling work in Greater London in 2011. The lower figure (2,400) in 2021 reflects the impact of Covid-19 pandemic restrictions.

Census 2021 travel to work data are the most comprehensive source of commuting data available. However, the Census results reflect the exceptional effects of the Covid-19 pandemic through 2020 and 2021 which saw significant numbers of people, particularly office-based workers, move to working at home or hybrid home-office arrangements. Furlough, redundancies (reflected in the Claimant Count data) and other significant changes of circumstance affected Hemel Hempstead's residents in the same way as much of the UK over that period. As a result, the 2021 travel to work data cannot be relied on as an accurate picture of the commuting origins and destinations of people living and working in Hemel Hempstead.

The data which are available point to a majority of residents (50%+) working in the town when working at home or no fixed place is included. Over 80% work in Hertfordshire. London's proximity is reflected in data (2011 Census) showing that 12% of residents worked in Greater London. It is difficult to say with certainty where Hemel's 2021 workforce originated from, although 2011 data suggested c. 60% originated from Hertfordshire.

However, the working patterns of Hemel Hempstead's residents now and in the future are a key factor in realising the opportunities presented by housing and employment growth in the town. Sustainability and the drive to net zero mean that many more residents could (and should) be expected to work close to home, either in workplaces or at home. Housing growth and the population it brings therefore represents a boost to the supply of labour to support employment growth in the town, a driver of its wider and long-term economic and social sustainability, and a source of new businesses that will be created in the town.

Hemel Hempstead Resident Places of Work, 2011 and 2021

Place of Work	No. working (2011)	% of total working residents (2011)	No. working (2021)	% of total working residents (2021)
Hemel Hempstead	15,130	34%	9,957	21%
At Home or No Fixed Place	8,209	19%	23,613	50%
Elsewhere in Dacorum	3,053	7%	2,166	5%
St Albans	2,413	5.5%	2,010	4%
Elsewhere in Hertfordshire	5,805	13%	3,084	7%
London	5,151	12%	2,373	5%

Source: Census, 2021 and Census, 2011

Hemel Hempstead Workers Places of Residence, 2011 and 2021

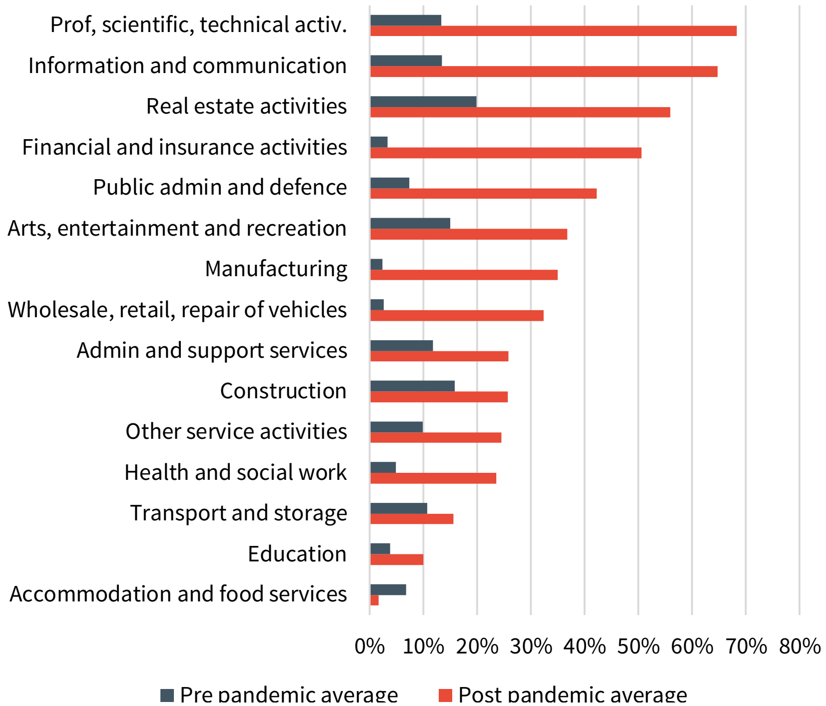
Place of Residence	No. working in Hemel Hempstead (2011)	% of Hemel's total workforce (2011)	Place of Residence (2021)	% of Hemel's total workforce (2021)
Hemel Hempstead	15,130	36%	9,957	22%
Elsewhere in Dacorum	2,615	6%	2,166	5%
St Albans	1,697	4%	954	2%
Hertfordshire	6,141	15%	2,918	6%
London	2,040	5%	1,225	3%

Source: Census, 2021 and Census, 2011

People | Homeworking

Key Points

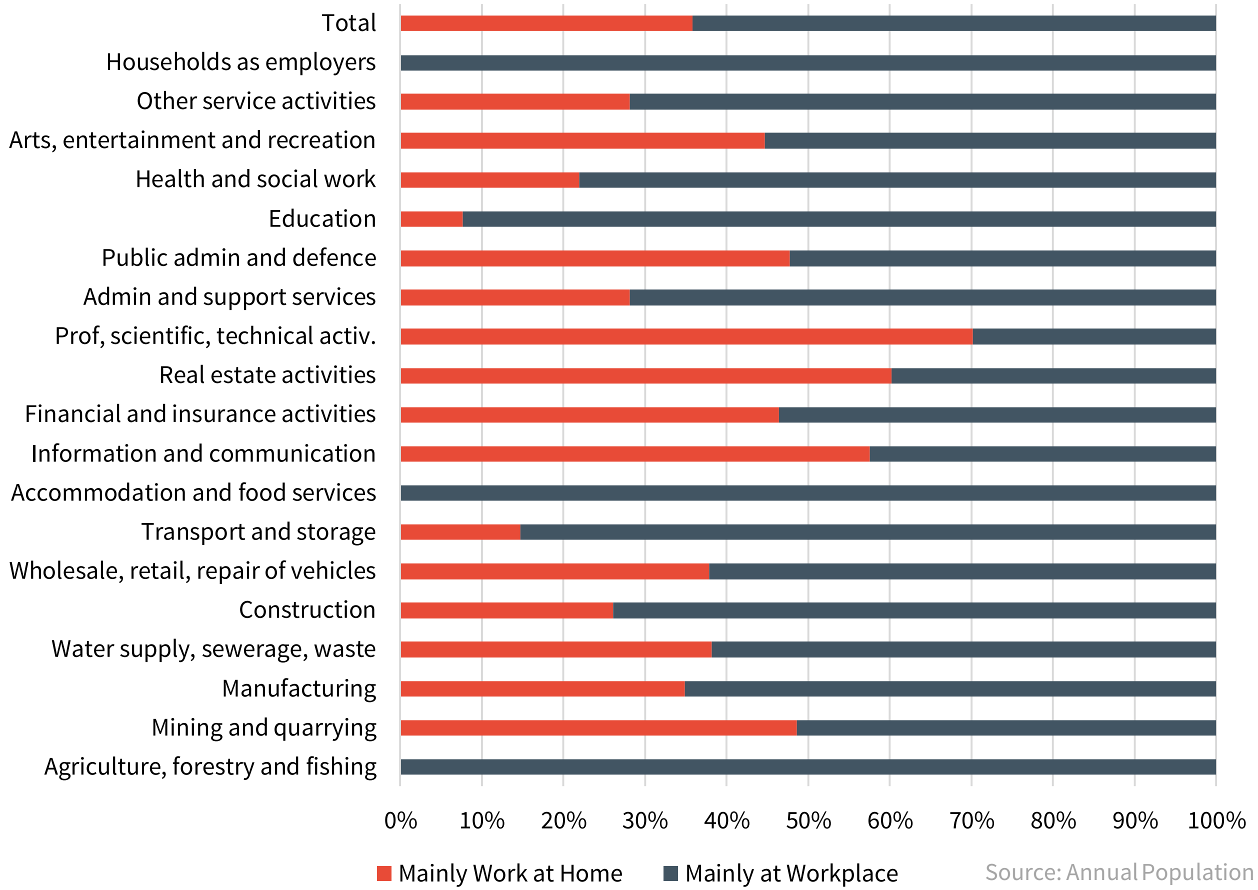
- Significant changes in homeworking resulted from the Covid-19 pandemic. Office based sectors in particular saw substantial increases in the proportion of workers mainly working at home
- Current data (2023) suggests that, for some sectors including professional, scientific and technical services, ICT and real estate, these may be long-term or even permanent changes.



This is both a key challenge and an important opportunity for Hemel Hempstead. The increase in home and hybrid working means more working residents are 'retained' in the town each day, potentially providing a boost to spending in businesses in the town, but also creating additional pressures on services. Reducing the need to travel, particularly by private vehicle, has environmental benefits, but these may be offset by higher energy consumption at home working premises.

These changes have implications for the size and type of commercial premises that Hemel Hempstead requires, both in terms of its existing supply and future development. This could include less demand for larger offices, the need for smaller, flexible workspaces, including for part-home based workers, and the infrastructure including high quality internet connectivity to enable home working. Conversely movement back to working from employment premises will require the sites and premises to accommodate this.

Working at Home, South West Hertfordshire, 2023



Source: Annual Population Survey

People | Health and Wellbeing

Key Points

- Significant differences between wards in the town on a range of health and wellbeing indicators
- Several wards (Adeyfield East and West), Grovehill, Town Centre, Highfield rank significantly worse than the England average
- Hemel Hempstead Town and Highfield score least favourably. Boxmoor, Gadebridge and Leverstock Green score most favourably

Socio-economic disparity in Hemel Hempstead is shown in public health data which shows significant differences between the town's wards (and the people who live there) on a series of health and wellbeing indicators.

- **Preventable deaths:** Much higher rates of preventable deaths in under 75s in 5 wards than the England average, and far above the best performing wards
- **Deaths from Cancer:** Mortality rate data shows that 3 wards have higher rates than England average
- **Overcrowding:** Hemel Hempstead Town and Highfield have a higher proportion of overcrowded households than England average
- **Year 6 Obesity:** 3 wards have higher proportions than England of children who are assessed as obese in year 6.
- **Fuel Poverty:** One ward (Highfield) has a higher proportion of households in fuel poverty than England
- **Child Poverty:** 3 wards have significantly higher proportions of households affected by child poverty

These issues are symptomatic of the multiple challenges associated with deprivation. Wards in the central spine and to the east of the town centre are those with the most acute health and wellbeing challenges. Wards to the west and south are the best performing on the same indicators.

Comparison of Hemel Hempstead Wards, Selected Health and Wellbeing Indicators

	Deaths from Causes Considered Preventable, Under 75s (2016-20) Indexed	Deaths from Cancer, All Ages, SMR (2016-2020)	Households with Overcrowding	Year 6 Prevalence of Obesity (2020/21 - 22/23)	Proportion of Households Living in Fuel Poverty (2020)	Child Poverty Income Deprivation Affecting Children Index (2019) % of households
Adeyfield East	122.5	82.7	8%	26.7	12.0	24.2
Adeyfield West	115.7	115.9	7%	20.0	13.0	13.8
Grovehill	108.4	94.9	8%	26.9	13.1	23.4
Hemel Hempstead Town	151.6	106.2	16%	20.9	11.5	14.3
Highfield	164.9	109.3	10%	22.9	16.3	24.0
Boxmoor	56.6	89.1	7%	13.7	9.6	5.3
Gadebridge	82.1	87.0	6%	22.0	12.5	11.7
Leverstock Green	77.3	80.0	6%	17.1	12.7	15.1
Dacorum	82.6	91.4	6%	18.8	11.1	11.9
England	100.0	100.0	9%	22.5	13.2	17.1

Source: Local Authority Health Profiles, Public Health England

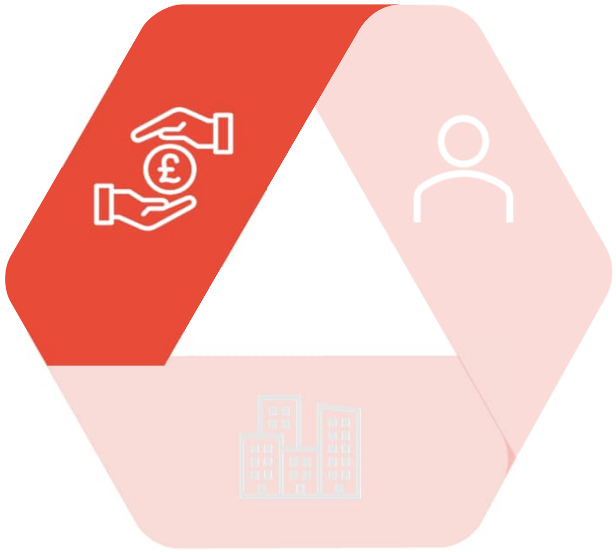
People | Summary: Implications for Hemel Hempstead

Strengths and Opportunities

- Growing and younger population in Hemel Hempstead underpins the socio-economic resilience of the town, and its long-term economic growth potential through a substantial resident workforce.
- Lower old age dependency ratio is likely to continue to be a feature of the town, better enabling the town to meet the health and social care needs of older residents.
- Potential for HGC to deliver 11,800 homes for 28,000 residents will reinforce the town's capacity to deliver economic growth and respond to the challenge of an ageing population.
- Positive recent change of +8% in the proportion of residents qualified to NVQ Level 4 or higher, and with NVQ Level 3 or higher qualifications, may reflect town's attractiveness to younger people, accessibility of good quality employment in the wider Hertfordshire area and educational attainment improvements in the town.
- Substantial increases in home and hybrid working may represent long-term shift in working patterns. Potential economic and social benefits from many more residents living and working in the town, running businesses, spending money and supporting the sustainability of local services and facilities.

Weaknesses and Challenges

- Unemployment has not returned to pre-Covid 19 levels and there are concentrations of unemployed residents in central areas of the town suggesting that people in these communities are not benefiting from the town's strong, recent employment growth performance.
- Significantly fewer jobs in higher skilled, higher paid occupations in Hemel Hempstead compared with residents in those occupations suggests people finding this type of work outside the town. This reinforces the priority attached to attracting more and better paid employment to Hemel.
- Proportions of jobs in the town in lower skilled and paid occupations is significantly higher than Dacorum, St. Albans and Hertfordshire.
- Lower proportions of residents are qualified to degree level and higher proportion without qualifications than the wider area – qualifications and skills likely to be a barrier to some residents securing better paid employment in the town.
- Concentrations of residents without qualifications through Hemel's central spine, consistent with evidence on the town's more deprived communities
- Apparent persistence of home working post-pandemic, particularly in professional and financial services, ICT and public services, creates challenges for office-based businesses and jobs in the town, raising questions about the scale and type of current and future office space that will be required.
- Most acute health and wellbeing issues are concentrated in communities in and around the town centre, central and east Hemel.



Prosperity

Prosperity | Employment

Key Points

- Very strong employment growth in Hemel Hempstead between 2015 and 2022 at 2.2% per annum
- Hemel's share of total employment in Hertfordshire is 8%, a slight increase since 2015
- Sectors driving recent growth include wholesale, logistics and distribution, information and communication technology, and construction

Hemel Hempstead is a significant employment centre in Hertfordshire, accounting for 8% of total employment in the county. Its recent record of employment growth appears strong, driven by the expansion of the logistics and distribution industry, ICT employment and construction. Some growth has occurred in health and care sector employment, including NHS facilities and care facilities, likely to reflect demand from a growing and ageing population. This reflects the important role of the Maylands employment area and the delivery of new commercial space for warehousing activity. Both retail and manufacturing have seen employment fall over the 2015-22 period.

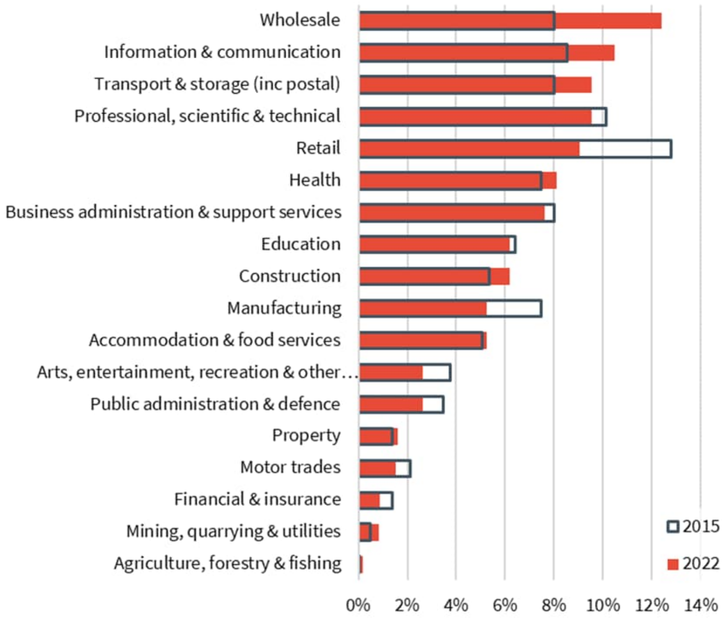
High location quotients in warehousing-based activities including wholesale, transportation and storage are consistent with pattern of recent commercial development in Hemel Hempstead, which includes the Prologis Park development (Maylands). Change in the ICT sector appears positive for Dacorum, driven both by the small number of larger, established businesses operating in Hemel Hempstead and by micro businesses in sub-sectors including computer consultancy which appear to have expanded substantially. It should be noted that some jobs in this sector could be registered to firms in Hemel but are employees based elsewhere.

Total Employment, 2015-22

	Hemel Hempstead	Hertfordshire	Hemel % of Hertfordshire
2015	45,125	602,000	7%
2016	48,375	621,000	8%
2017	47,500	646,500	7%
2018	48,750	648,500	8%
2019	49,000	651,000	8%
2020	49,500	649,500	8%
2021	50,000	669,500	7%
2022	52,500	647,500	8%
Change	7,375	52,500	
Annual % Change	2.2%	1.0%	

Source: ONS, Business Register and Employment Survey
Note: Substantial growth in employment agency jobs features in Dacorum's employment data. Since these are likely to be jobs registered to companies in the district but which could be elsewhere in the UK, they are not included in the growth data

Hemel Hempstead, Sector Shares, 2015 and 2022



Source: ONS, Business Register and Employment Survey

Total Employment Change, 2015-22

Sector	Location Quotient	Total Employment 2022	Growth 2015-22
Wholesale	3.3	6,500	73%
Information & communication	2.2	5,500	38%
Transport & storage (inc postal)	1.9	5,000	33%
Construction	1.3	3,250	30%
Retail	1.1	4,750	-21%
Professional, scientific & technical	1.0	5,000	5%
Total		**30,000**	21%

Source: ONS, Business Register and Employment Survey

Prosperity | Employment: Sectors

Key Points

- Hemel Hempstead has seen substantial growth in agri-tech and ICT since 2015, bucking the trend in Hertfordshire in the same period; ICT in particular is a major source of jobs in the town
- Film and television sector has contracted across the area, and accounts for only 200 jobs in Hemel Hempstead
- Life sciences is a small sector in Hemel Hempstead and Dacorum, but a significant employer across Hertfordshire
- Hemel Hempstead's growth in professional services has also been strong between 2015 and 2022 and it is a major source of jobs in the town

There is a mixed picture for those sectors identified as priorities and growth opportunities for Hemel Garden Communities and the town. Both ICT and higher value professional services are major source of jobs (5,000+) and have seen robust growth since 2015. Hemel has a particularly important role in the sector across Hertfordshire.

Agri-tech (800) and life sciences (75) are much smaller components of Hemel's economy, but the town is located in an area in which there are significant knowledge and commercial assets (e.g. Rothamsted, GSK) and where HGC and its partners have identified an appetite to see an increased presence for these sectors in the town, focusing particularly on East Hemel.

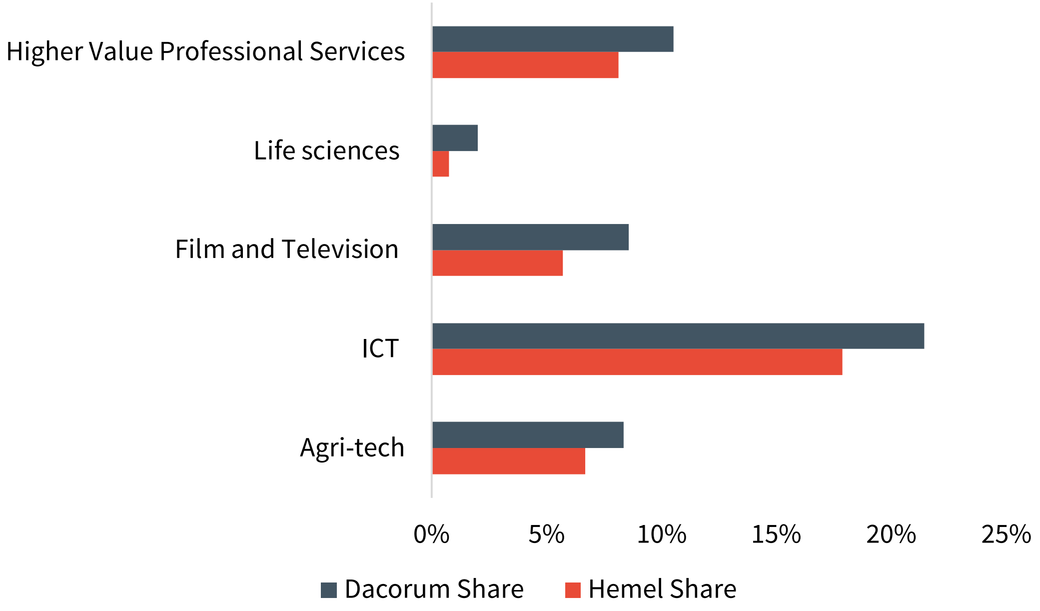
The film and television sector is a distinctive feature of Hertfordshire's economy, driven by national and international assets including Warner Brothers' Leavesden facility and Elstree Studios. Whilst the sector appears to have contracted with the broadcast industry facing short-term pressure from advertising revenues, spending restraint, and the effect of the recent writers' strike, the Hertfordshire LEP's action plan for the sector points to thousands of hidden freelance jobs and potential to see employment double during this decade.

Priority Sector Employment, 2015-22

	Hemel Hempstead		Dacorum		St. Albans		Hertfordshire	
Sector	2022	% Change 2015-22	2022	% Change 2015-22	2022	% Change 2015-22		% Change 2015-22
Agri-tech	800	167%	1,000	43%	1,250	0%	12,000	0%
ICT	5,000	43%	6,000	33%	2,500	-17%	28,000	0%
Film and Television	200	-43%	300	-57%	300	-50%	3,500	-43%
Life sciences	75	0%	200	-11%	600	-14%	10,000	-9%
Professional Services	5,075	14%	6,575	1%	8,750	-24%	62,500	-7%

Source: ONS, Business Register and Employment Survey

Shares of Hertfordshire Employment in Priority Sectors



Source: ONS, Business Register and Employment Survey, 2023

HATCH

Prosperity | Businesses

Key Points

- Micro and small business dominate the business stock (97%) but Hemel Hempstead has slightly larger share of large businesses compared with wider area.
- Sector shares led by construction, professional services, ICT, business admin and support, transportation and storage

Business data points to the important role that Hemel Hempstead plays in Hertfordshire's business base. It is home to just under 4,000 businesses, 7% of Hertfordshire's total, but 12% of its large businesses (250+ employees).
The employment strengths of the town in construction, professional services, ICT and business services are reflected in business numbers, with each sector accounting for more than 10% shares of all businesses.

A recent increase in the number of businesses suggests that Hemel Hempstead may have performed better through the pandemic years than other areas. Whilst the increase 2018-23 is small (40 businesses), it is a positive signal over an extremely challenging period in the UK economy generally.

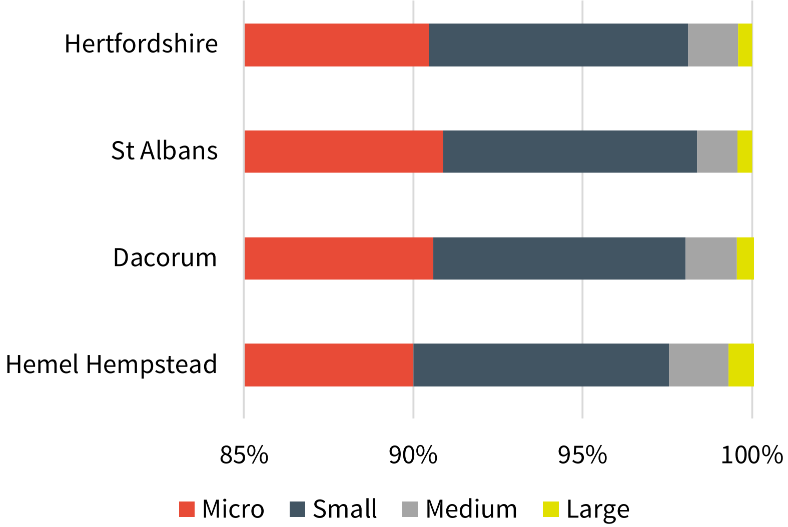
The size profile of businesses is consistent with that of the UK generally, with micro and small businesses accounting for most of the town's active enterprises.

Business Base Change, 2018-23

	2018	2023	Change	% change
Hemel Hempstead	3,935	3,975	40	+1.0%
Dacorum	7,900	7,920	20	+0.3%
St Albans	8,915	8,335	-580	-6.5%
Hertfordshire	61,765	60,785	-980	-1.6%

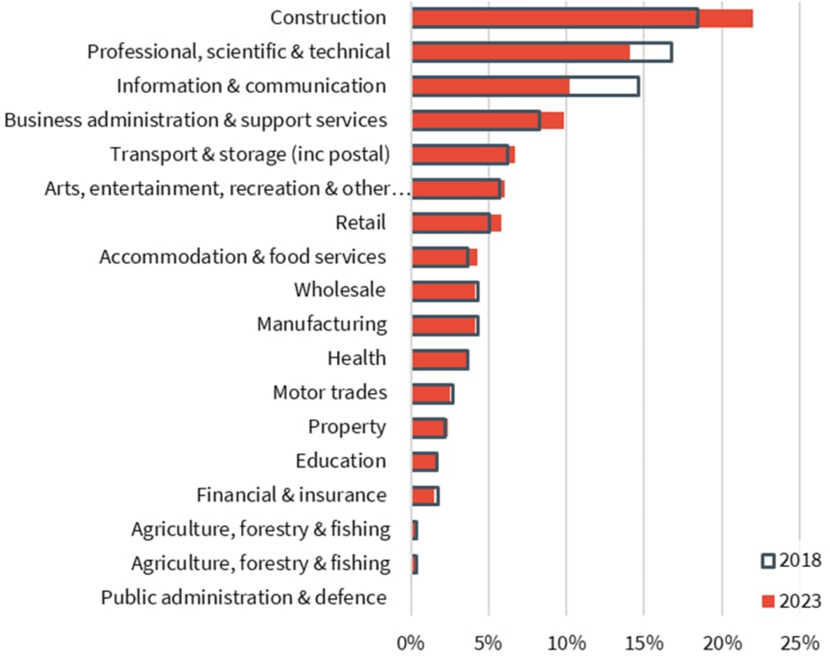
Source: ONS, Business Counts, 2023

Business Size, 2023



Source: ONS, UK Business Counts, 2023

Hemel Hempstead Businesses- Sector Shares 2018 and 23



Source: ONS, UK Business Counts 2023

3,975
Businesses

7%
Hertfordshire Total

30
Large Businesses

12%
Hertfordshire Total

HATCH

Prosperity | Enterprise & Innovation

Key Points

- Despite the pandemic, Hemel Hempstead saw a small net increase in the number of businesses between 2018 and 2023
- Enterprise birth rates have fallen in Dacorum, St. Albans distrct and Hertfordshire, and death rates have risen
- Business birth and death rates in Dacorum c. 10 so little net additional enterprise formation is occurring
- Positive evidence about engagement of Hemel-based companies and organisations in funded innovation activity

A recent increase in the number of businesses suggests that Hemel Hempstead may have performed better through the pandemic years than other areas. Whilst the increase 2018-23 is small (40 businesses), it is a positive sign over an extremely challenging period in the UK economy generally. However, analysis of business birth and death rates suggests that business births have fallen and deaths risen across the area. For Dacorum, its current business birth rate (per 1,000 working age people) is 9.7 compared with a death rate of 10.6. This points to challenging conditions in which to start and run a business, and the need to support new business formation.

There are positive indications in Innovate UK grant funding evidence that Hemel has an active but small number of businesses securing R&D, knowledge transfer and other funding for innovation. Over 19 years from 2004, companies in Hemel secured and/or were partners in 41 projects with a total Innovate UK funding value of £5.85 million. Many of the completed projects, in which advanced manufacturing is the largest single category of project focus on sustainable materials, technologies and processes, aligning with priorities for the environmental technology sector.

Business Base Change, 2018-23

	2018	2023	Change	% change
Hemel Hempstead	3,935	3,975	40	+1.0%
Dacorum	7,900	7,920	20	+0.3%
St Albans	8,915	8,335	-580	-6.5%
Hertfordshire	61,765	60,785	-980	-1.6%

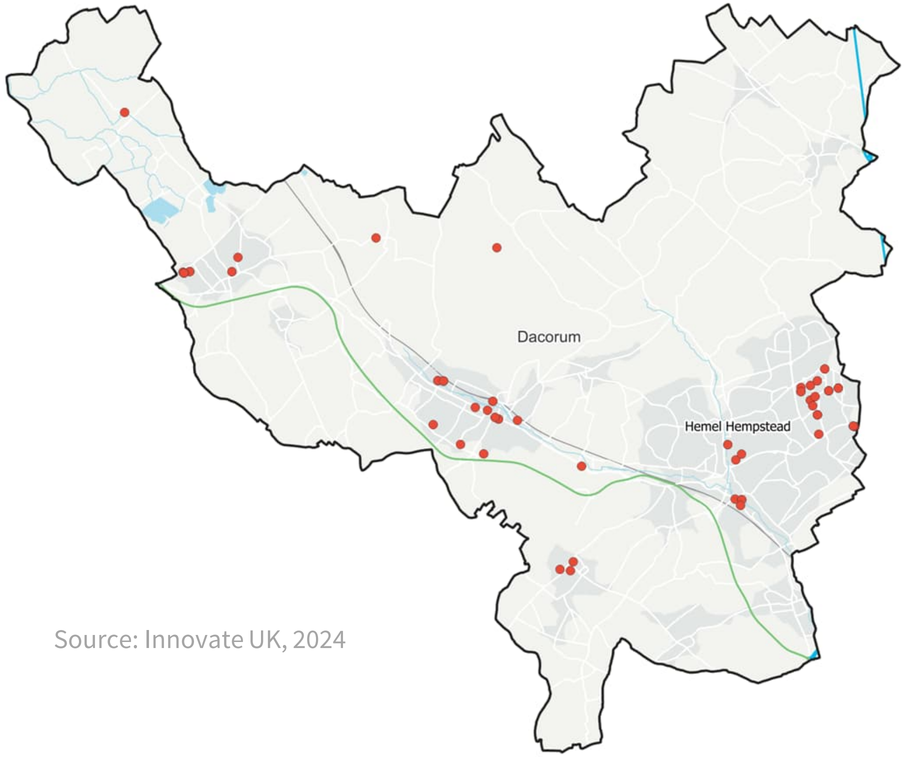
Source: ONS, Business Counts, 2023

Business Base Change, 2018-23

Births	2017	2018	2019	2020	2021	2022
Dacorum	1,005	945	945	865	970	935
St Albans	1,060	1,085	1,560	935	1,045	935
Herts	10,010	9,080	8,695	6,970	7,350	7,120
Deaths						
Dacorum	845	835	865	875	970	1,030
St Albans	1,585	940	995	1,115	1,525	1,050
Herts	9,210	7,200	7,785	7,695	8,575	7,680

Source: ONS, Business Demography

Locations of Innovate UK Funded Projects, 2004-23



Source: Innovate UK, 2024

Number and Value Innovate UK Awards, 2004-23

Award Year	No. Projects	Award Value (£m)
2004/05	7	0.95
2006/07	2	0.2
2007/08	2	0.1
2008/09	1	0.03
2010/11	3	0.35
2011/12	3	0.75
2012/13	6	0.7
2013/14	6	0.55
2015/16	2	0.7
2016/17	2	0.6
2017/18	1	0.07
2020/21	2	0.15
2021/2	3	0.55
2022/3	1	0.15
Total	41	5.85

Source: Innovate UK

HATCH

Prosperity | Future Employment Growth

Key Points

- Potential for HGC to contribute to generating 8,000 additional jobs in Hemel Hempstead over the period to 2050
- Development of 55 ha East Hemel as part of significant expansion of Maylands could accommodate 6,000 jobs
- Expansion of town's population through housing development could generate 2,000 additional jobs in foundational economy
- Construction activity will create significant requirement for workers in Hemel and across wider Hertfordshire area. Potential for 28,000 temporary construction jobs.

Hemel Garden Town has the potential to drive future employment and business growth in Hemel Hempstead, building on the town's strong recent record of delivering employment growth.

Strategies and masterplans for Hemel, including HGC's vision and Herts IQ's strategy, point to potential for East Hemel to be established as a major new employment centre for up to 6,000 jobs across sectors including professional services, science or R&D led activity, higher education, manufacturing, logistics and distribution.

Beyond East Hemel, plans for other key opportunity and regeneration areas in Hemel Hempstead, including the Station Gateway will further contribute additional jobs, principally in retail and leisure uses.

Meeting the needs of the population of HGC development sites will itself be a significant generator of jobs (estimated 2,000). This is a driver of employment growth explored later in this report.

Overall employment growth of 10,000 jobs would be well aligned with the ratios of future homes to jobs evident in planning and delivery strategies for new settlements and urban extensions in England. A review of locations including Waterbeach (South Cambs) Northstowe (Cambridge) North West Bicester (Oxfordshire) and Shereford (Plymouth).

Source of Future Jobs	Employment Potential	
East Hemel (Central) - 55 hectares	6,000 jobs	Potential employment supported by development of office, R&D, education and industrial floorspace on two East Hemel sites
Hemel Garden Communities	2,000 jobs	Estimated impacts of HGC through employment created in foundational economy – retail, leisure, schools, health facilities, transport, other community services and facilities
Construction Activity	28,000 temporary jobs	Over a 30 year+ period based on evidence that 1 home generates 2.4 direct, indirect and induced jobs in the economy

0.7—0.9

Average planned jobs per dwelling in new settlements and urban extension developments in England (based on a review of planning information by Hatch)

500-700 per ha

New homes per hectare of employment land development in new settlements

Prosperity | Deprivation

Key Points

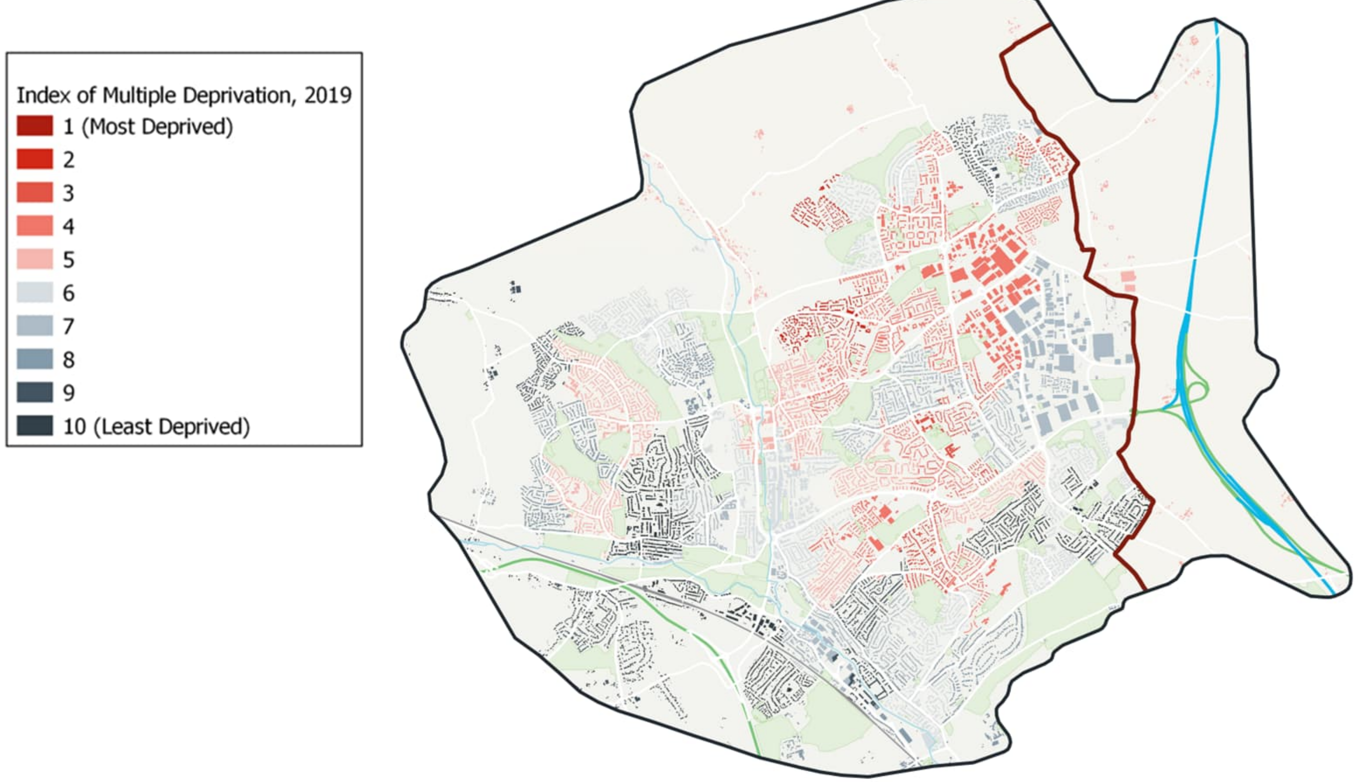
- Deprivation linked to education and skills accounts for highest number of localities in the 20% most deprived nationally, with crime, housing and services also key issues in some communities
- Concentrations of highest deprivation in and around the town centre, east and north Hemel Hempstead.
- Least deprived areas in the south and west of the town, pointing to significant spatial disparities within the town

Analysis of deprivation data points to communities in and around the town centre who face challenges associated with education and skills, crime, and access to housing and services. Of 58 localities, 11 (19%) are in the most deprived 20% nationally in measures of deprivation which relate to educational and skills attainment levels, 9 (16%) on the crime measure (likelihood of being a victim of crime) and 7 (12%) on the housing and services measure (geographic and financial accessibility to services and housing). The data shows that these issues are concentrated in specific localities, particularly those in and around the centre of Hemel Hempstead and to the north of the town centre.

Analysis of earlier, 2015 data, shows that Dacorum saw a slight increase in the proportion of localities in the most deprived 20% between 2015 and 2019, suggesting that deprivation worsened for some communities.

Census 2021 data confirms the unequal distribution of deprivation across the town and the concentrations in specific localities including the town centre and areas to the north and south of it. The data shows that wards with the highest proportion of households which are deprived on two or more key indicators (crime, education, employment, health and housing) include Highfield (24.6%), Hemel Hempstead Town (21.0%), Adeyfield West (21.8% and Grovehill (21.1%). These figures are higher than the average for Hertfordshire (14.3%) and the national average for England (18.1%).

Deprivation in Hemel Hempstead, 2019



Source: MHCLG (2019) Indices of Deprivation

Number of LSOAs in the AOI in 20% most deprived nationally, 2019

Income	Employment	Education and skills	Health	Crime	Housing and services	Living environment
4 out of 58	2 out of 58	11 out of 58	0 out of 58	9 out of 58	7 out of 58	1 out of 58
7%	3%	19%	0%	16%	12%	2%

Prosperity | Housing Affordability

Key Points

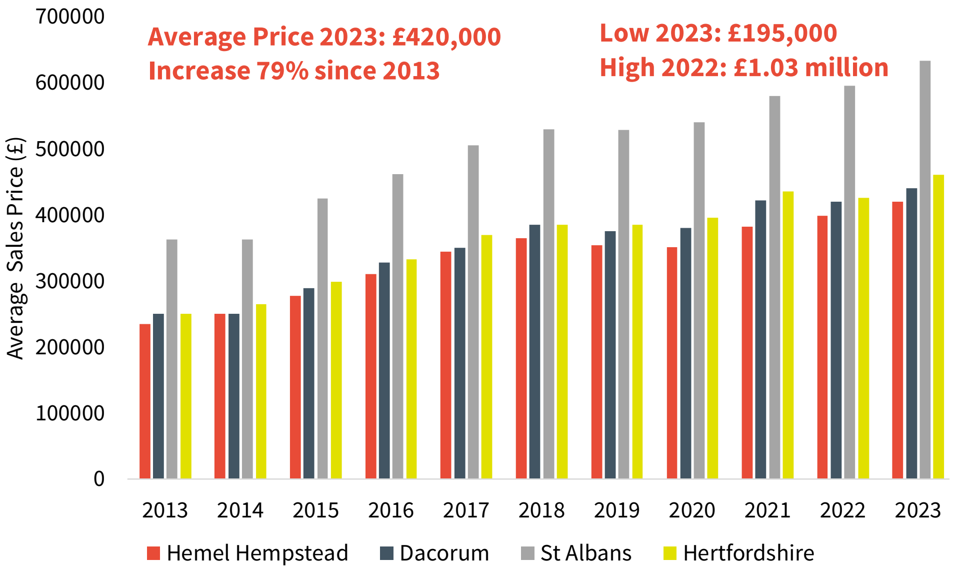
- Median average house price of £420,000 in 2023, with a significant increase of 79% since 2013
- Lower quartile average house of £325,000 in Hemel Hempstead on par with that of the wider area, but has increased by 75%, the largest increase of the areas included in the data
- Median and lower quartile prices vary substantially between different localities, from a low of £154,000 to a high of £1.03 million

Housing affordability is a key determinant of access to housing and the financial wellbeing of households. Price data shows Hemel Hempstead is slightly more affordable than Dacorum and Hertfordshire, and significantly more affordable than St Albans District.

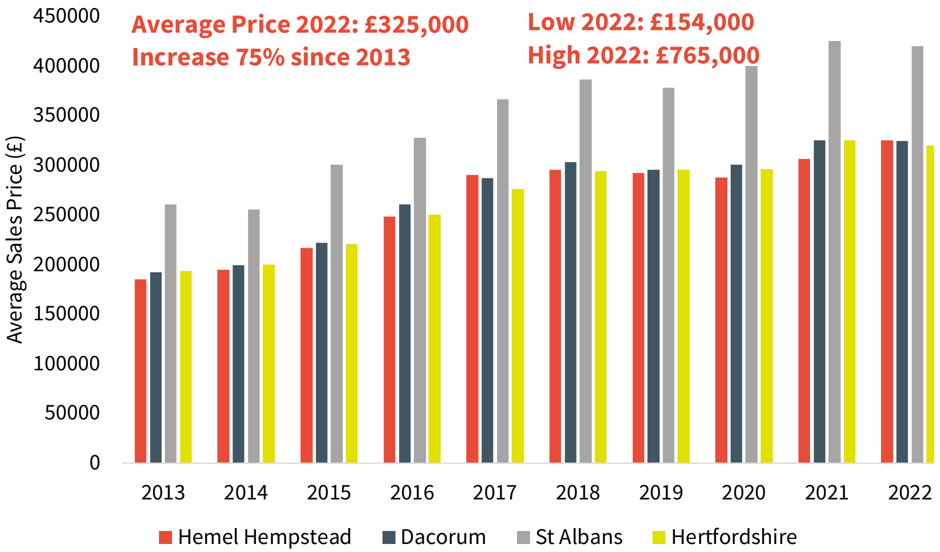
However, affordability has worsened since 2013, consistent with the pattern across much of the UK. Lower quartile house prices, the segment of the market which should be the most affordable for home ownership, increased by 75% from 2013-22. This is a higher rate than that of Dacorum, St. Albans or Hertfordshire. With housing supply across the UK failing to keep pace with demand and the importance of home ownership as an investment, it points to Hemel Hempstead 'catching-up' as buyers seek more affordable property. Data for 2020 (the latest available) on affordability ratios shows that the figure stood at 8.4 in Hemel Hempstead. Given further increases in house prices it will have worsened.

There are significant differences between prices in different localities within Hemel Hempstead. For example, for lower quartile prices, the lowest value of £154,000 contrasts with a high value of £765,000.

Hemel Median Average Sold House Prices, 2013-23



Hemel Lower Quartile Average Sold House Prices,



Source: ONS, HPSSA

Hemel House Prices and Household Incomes, 2020

£283,000	Average lower quartile house price
£33,800	Average household income
8.4	Affordability ratio

Source: ONS, HPSSA

HATCH

Prosperity | Household Income and Earnings

Key Points

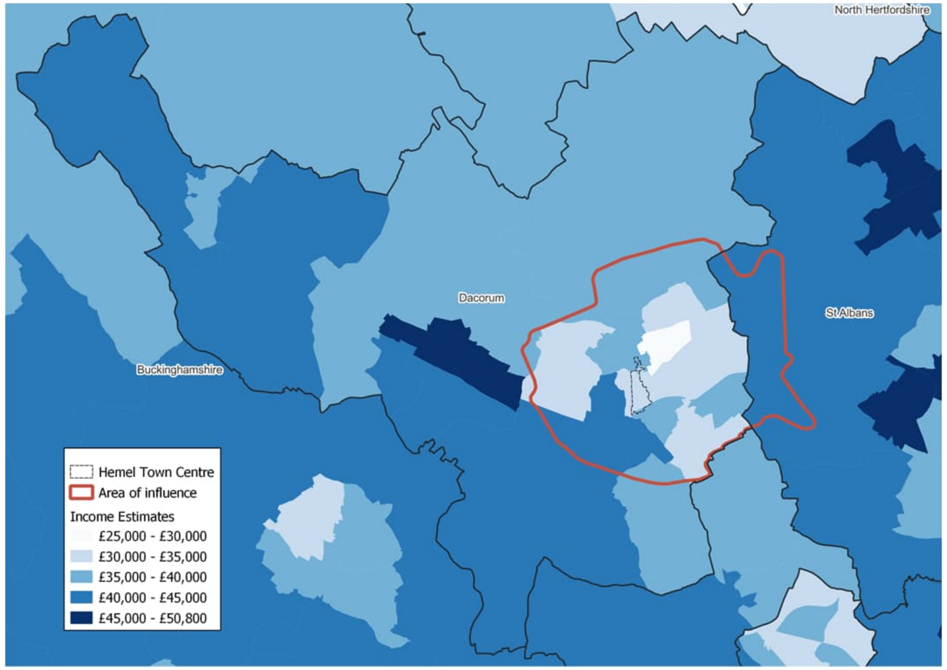
- Lowest household incomes in the area concentrated in Hemel Hempstead, and particularly central area of the town
- Higher income households in south and west Dacorum, St. Albans District and rural settlements.
- Dacorum has lower average earnings than St. Albans and Hertfordshire and much lower average weekly workplace earnings

Small area household income data have not been published by the ONS since 2020. Data for 2020 shows that that the lowest household incomes (net incomes excluding housing costs) in the area are clustered in central and eastern areas of Hemel Hempstead, with the majority of higher income households outside the town in south and west Dacorum and St. Albans. These differences are substantial, with the lowest incomes £25-30,000 and the highest £45-50,000.

Individual earnings data reinforces the evidence on income distribution. Dacorum borough's average resident earnings are lower, and the borough has the largest differential between resident and workplace earnings. This is consistent with travel to work data showing that residents in higher paid occupations are more likely to work outside the town, and that the town lacks substantial numbers of higher paid jobs, particularly in senior managerial and professional occupations. Lower workplace earnings data may also reflect the inclusion of lower paid employment in sectors such as some employment agency work where the job is registered to a Hemel-based company, but which are not jobs undertaken in the town itself.

Incomes and earnings data underlines the need to attract and expand employment in the town that provides residents with a wider range of better paid and higher skilled employment. Low incomes are a key factor in deprivation and associated health and wellbeing problems, and are likely to be particularly acute at a time when many households are faced with significant cost of living pressure.

Household Income Estimates (2020)



Source: ONS, HPSSA

Average Weekly Gross Pay, Resident and Workplace, 2023

Source: ONS, Annual Survey of Hours and Earnings

Prosperity | Household Incomes and Types

Key Points

- 52% of Hemel Hempstead households in the £20-40,000 household income band
- 8% of households with household income of less than £15,000 a year
- Significantly higher proportions of households in Hemel Hempstead in lower income bands compared with Dacorum
- Household types in Hemel Hempstead reflect higher proportion of younger and lower earning households than the average for Dacorum

Analysis of household characteristics as part of a study of potential transport modal shift used Experian's Mosaic household types framework. This data points to the substantial majority of Hemel Hempstead's households having incomes of £20-40,000 a year, confirming the analysis of ONS data. These households are a mix of younger aged households (26-35 year olds) and low income, older households (56+).

Comparison with Dacorum also confirms the analysis of ONS income data. Higher income households are more likely to be found outside the town, with the borough having higher proportions of both younger and higher earning households and affluent older households than Hemel Hempstead.

The data shows 8% of Hemel Hempstead householders, mainly older people over aged 56, in households with incomes less than £15,000 a year.

Whilst the majority of households (57%) own their homes, a significant proportion (43%) are tenants of either Housing Association/Council owned housing or private rented accommodation. Comparable figures for Hertfordshire and England from the 2021 Census imply that a significantly larger share of Hemel Hempstead's residents live in rented housing (35% and 37% respectively).

The modal shift study suggests that Hemel Garden Community sites are likely to mirror the distribution of households in Hemel Hempstead.

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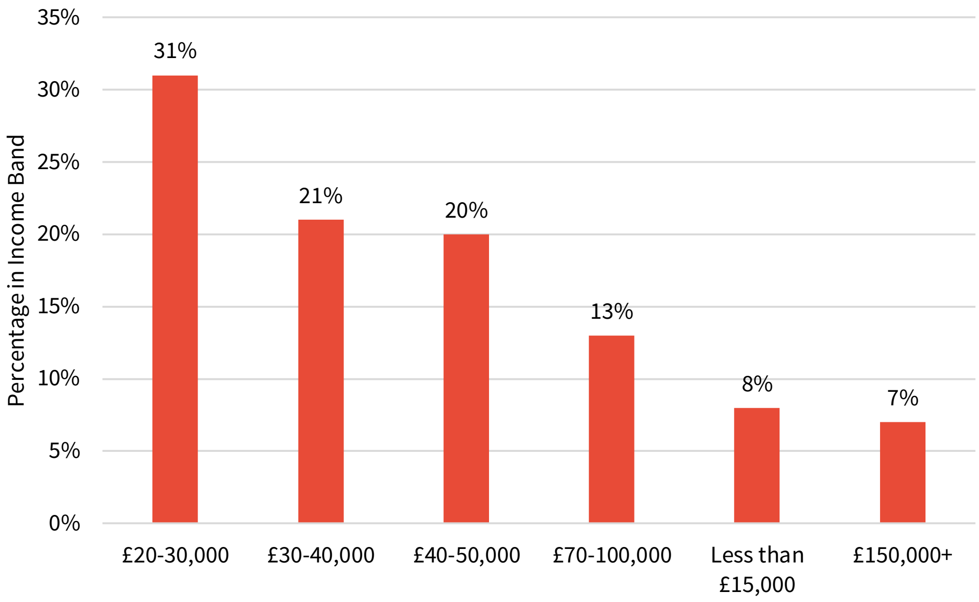
Category	% Households Hemel Hempstead	HH Income	Age	Tenure	% Households Dacorum	% Households HGC Sites
Aspiring Homemakers	21%	£40-50,000	26-35	Owned	16%	21%
Family Basics	17%	£20-30,000	36-45	Council/HA	12%	17%
Rental Hubs	14%	£30-40,000	26-35	Rented	10%	14%
Domestic Success	13%	£70-100,000	26-35	Owned	16%	13%
Prestige Positions	7%	£150,000	56-65	Owned	18%	7%
Suburban Stability	7%	£30-40,000	56-65	Owned	6%	7%
Vintage Value	6%	£<15,000	66+	Council/HA	5%	6%
Senior Security	4%	£20-30,000	66+	Owned	4%	4%
Transient Renters	4%	£20-30,000	26-35	Rented	2%	4%
Modest Traditions	3%	£20,30,000	56-65	Owned	2%	3%
Urban Cohesion	3%	£20-30,000	36-45	Owned	2%	3%
Municipal Tenants	2%	£<15,000	56-65	Council/HA	1%	2%

Distribution of Household Income, Hemel Hempstead



Source: Experian, Mosaic, UK E-Handbook

Prosperity | Household Types

Key Points

- High concentrations of ‘Family Basics’ households in central Hemel Hempstead.
- Rental hubs households clustered around eastern edge of town centre, south central and east Hemel Hempstead (Maylands)
- Aspiring homemakers households concentrated in north west and north east of town, with smaller cluster through around town centre and south central area.

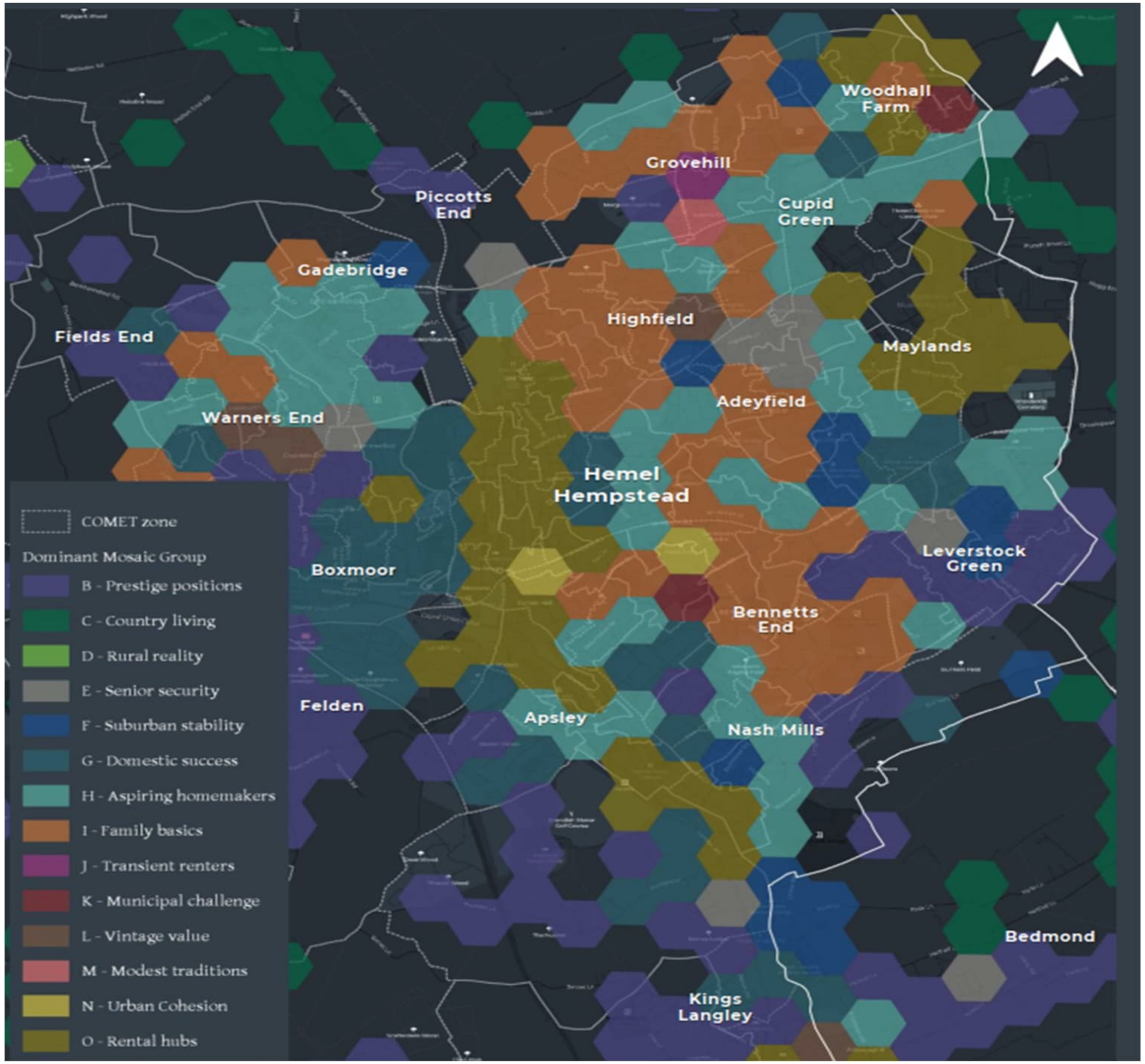
The geography of the main types of households in Hemel Hempstead shows the highest concentrations of lower income households through the central spine of the town, predominantly in the ‘Family Basics’ household type. These are family households, typically tenants in Housing Association or Council homes, with incomes of £20-30,000.

There are also concentrations of households in the ‘Rental Hubs’ category to the immediate east of the town centre, in the east of the town (Maylands) and south central areas. These are younger, working households typically in private rented housing with incomes in the £30-40,000 range.

‘Aspiring Homemakers’, households with incomes in the £40-50,000 range, are located in the north west of Hemel Hempstead, the north east and with smaller clusters close to the town centre and south central area. These are younger households considered to be ‘settling down’ and with young families.

The broader pattern is that higher earning households and those owning homes are more likely to live on the edge or outside the main urban areas.

Geography of Household Types, Hemel Hempstead



Source: WSP, Hemel Garden Communities, Potential Modal Shift and Experian, Mosaic, UK E-Handbook

HATCH

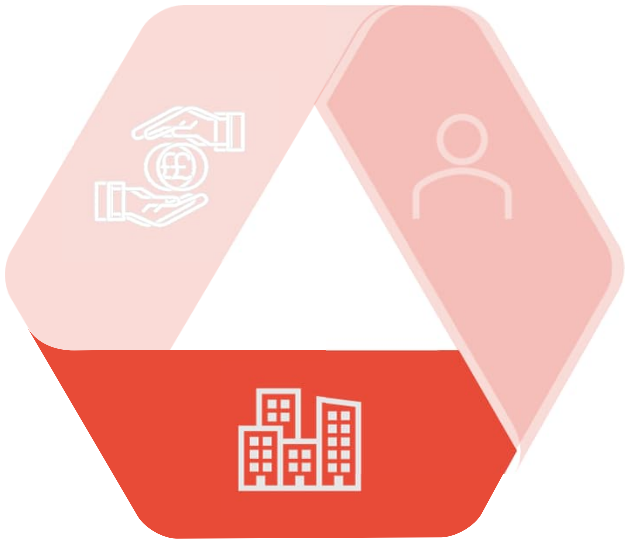
Prosperity | Summary: Implications for Hemel Hempstead

Strengths and Opportunities

- High employment growth since 2015 has reinforced Hemel's position as a key employment centre in Hertfordshire. The town has a bigger share (12%) of large businesses (250+ employees) than its overall share of businesses in Hertfordshire (7%), reinforcing this role.
- Growth driven by a diverse mix of sectors including professional services, ICT, wholesale, logistics and distribution and construction, reflecting benefits of new commercial development in the town (logistics and distribution), micro and small businesses (ICT) and performance of established business areas (Maylands).
- Some strengths in sectors identified as priorities or opportunities by HGC, Hertfordshire LEP, particularly ICT, professional services and agritech, with high rate of growth in these sectors since 2015.
- Evidence of innovation active companies in Hemel, with collaborative R&D activity, knowledge transfer partnerships and other funded projects in advanced manufacturing materials and mobility (transport technology). Strong emphasis on sustainable technologies, aligning with Envirotech priority.
- Despite the Covid 19 pandemic, Hemel has seen a recent increase in the number of businesses in the town in a period when the wide area saw business numbers either static or falling, driven primarily by the creation of micro-businesses.
- Combination of East Hemel future employment development, opportunity sites across the town and the substantial demand for public and private services a growing population will generate point to significant future jobs growth for Hemel of at least 8,000 additional jobs to 2050.
- Better affordability for home ownership was a strength which may have attracted new residents to Hemel Hempstead, but the affordability gap has closed with surrounding areas.

Weaknesses and Challenges

- Significant and persistent problems of deprivation faced by some of Hemel's communities, concentrated in the town's central spine including the Town Centre, Adeyfield and Maylands, Highfield and Grove Hill.
- Deprivation linked to education and skills attainment, access to housing and services and the impacts of crime stand out in the range of issues facing the most deprived communities.
- Majority of households (60%) in lower household income bands and Hemel Hempstead generally has significantly lower household incomes than residents of the wider Dacorum area, St. Albans and neighbouring Buckinghamshire.
- Worsening affordability for home ownership over the last decade as Hemel Hempstead appears to have 'caught up' with higher value housing markets in the wider area.
- Large difference between average resident and workplace earnings in Dacorum point to challenge for Hemel Hempstead as a lower wage economy, underlining the need to broaden employment and attract better paid and higher skilled jobs.
- Possibly a risk of over-reliance for future employment growth on the delivery of East Hemel, with much of the town's future supply of employment land focused on that site.
- Falling business birth and rising death rates in Dacorum, suggesting that economic conditions are currently working against new business formation and survival.



Place

Place | Office and Industrial Property

Key Points

- Quantity of industrial (manufacturing, warehousing) has consistently exceeded the quantity vacated in Hemel Hempstead, an indicator of continued demand
- Weaker demand in general for office floorspace, where the quantity vacated has exceeded the amount occupied since 2014
- Vacancy and availability rates for office floorspace have been consistently higher than those of industrial floorspace

Net absorption captures the difference between the amount of floorspace occupied and vacated. There is a marked difference between the office and industrial markets in Hemel Hempstead between 2014 and 2023:

- Consistently strong demand for industrial floorspace with a total of 1.4 million sq ft net absorption
- A fall of 293,000 sq ft in net absorption of office floorspace

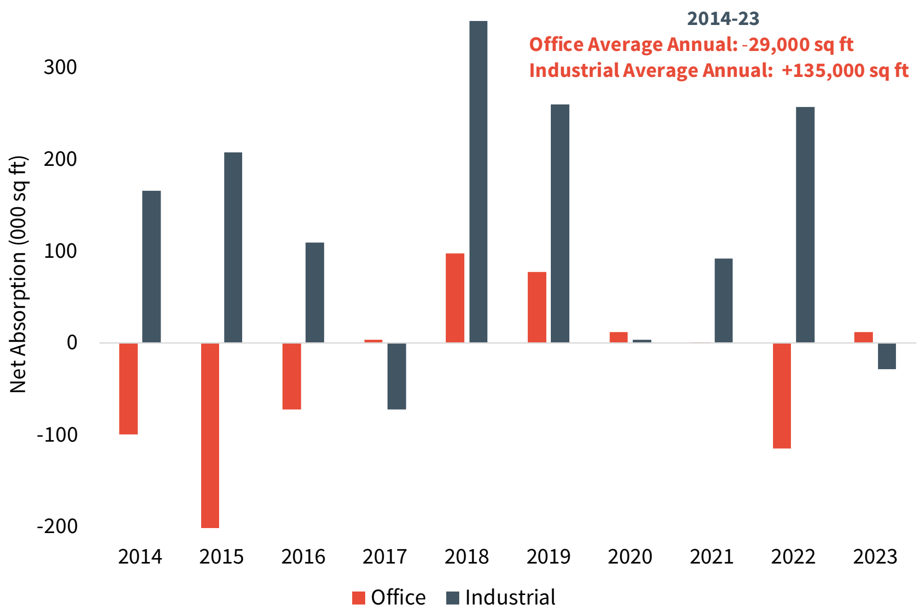
Availability and vacancy data reinforce the evidence that the industrial market has seen consistently stronger demand than the office market in Hemel Hempstead.

- Industrial vacancy is currently very low (1%), and the higher current availability rate of 8% is likely to reflect growth in the supply of floorspace since 2014.
- Current office vacancy is 8%, with availability at 7%, the latter likely to reflect the amount of office space lost contributed to rates of 10% and 8%.

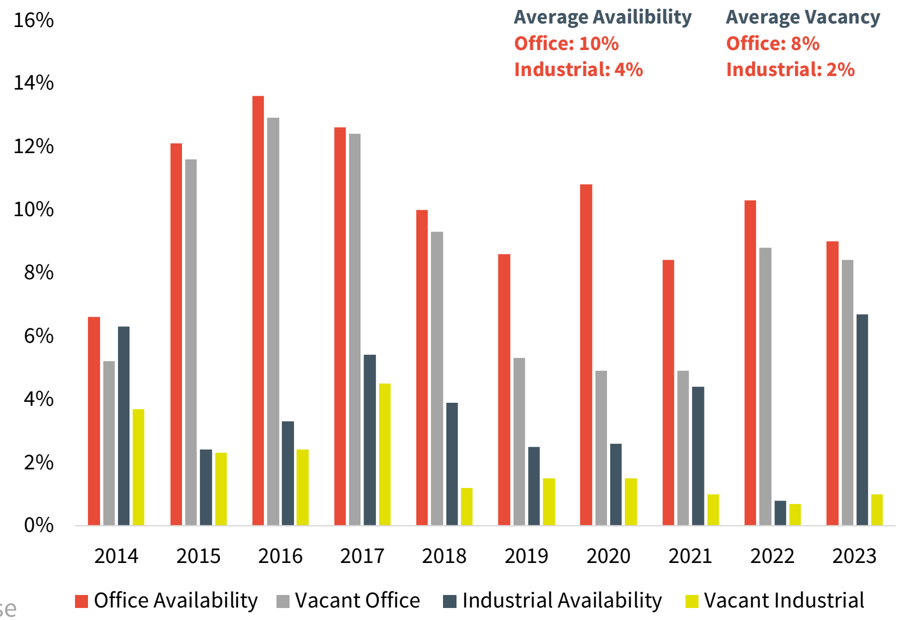
Overall, this points to stronger need for industrial floorspace than office space in Hemel Hempstead. With the Covid-19 pandemic having seen substantial numbers of office-based workers switch to working at home and a slow return to the workplace, this partly explains this trend. Market evidence suggests some office-based companies reevaluating the size and type of office space they require, which may also play a part in dampening current demand.

The implication is that future demand for office floorspace may not be at the levels or for the type of floorspace evident in previous decades. Conversely, the evidence suggests that demand for industrial space is likely to remain strong.

Net Absorption, Office and Industrial Property, Hemel Hempstead 2014-23



Availability and Vacancy, Office and Industrial Hemel Hempstead 2014-23



Source: CoStar commercial property database

Place | Size and Type of Office and Industrial Premises

Key Points

- Vacancy and availability for smaller office space is significantly lower than the figures for larger office floorspace, suggesting stronger demand and/or less supply of for this type of floorspace
- Industrial demand appears to be driven by larger floorspace (20,000 sq ft +) but vacancy and availability rates are lower than those of office property in most size bands
- Hemel Hempstead has a small number of the highest quality offices and very low vacancy and availability rates for this type of office building

There is substantial variation between the patterns of take-up, vacancy and availability depending on the size of office and industrial floorspace.

- Offices – Lower vacancy and availability rates for smaller sized premises (<10,000 sq ft) suggests that demand for this size of floorspace is stronger than is the case for larger premises.
- Industrial – Figures point to demand for all sizes of floorspace, with particularly low vacancy and availability rates for premises in both the 3-10,000 sq ft and 100,000+ sq ft ranges.

The data suggests that there is reasonably strong demand for what can be termed 'grow on' space – 3-5,000 sq ft. This aligns with a business base dominated by micro and small businesses, and may also point to limitations in the supply of such floorspace given the evidence on vacancy rates.

Further analysis of the quality of office premises suggests that Hemel Hempstead lacks a supply of higher quality (4 or 5 star rated) office buildings. The small number of such buildings (5) and very low vacancy and availability rates reinforce the point. By contrast, the town appears to have a large supply of lower rated office premises, reflecting the amount of older stock and business preferences for value, amongst other factors.

Given evidence of the changing nature of office-based business activity, it is difficult to assess the potential future need for any additional office floorspace in the town. However, the data points to demand for smaller premises, which is well-aligned with local priorities to expand business and employment activity in the town.

Key Office Data, 2014-23, Hemel Hempstead

	Size of Premises, Sq Ft					
	0-3,000	3-10,000	10,000-20,000	20,000-50,000	50,000-100,000	100,000+
Total Net Absorption	-1,980	14,099	15,824	-48,418	-11,8437	-142,171
Annual Average	-220	1,410	1,582	-4,842	-11,844	-14,217
Average Vacancy	2.5%	1.7%	2.4%	5.6%	7.7%	17.8%
Average Availability	2.1%	4.3%	5.0%	8.7%	9.0%	19.3%

Key Industrial Data, 2014-23, Hemel Hempstead

	Size of Premises, Sq Ft					
	0-3,000	3-10,000	10,000-20,000	20,000-50,000	50,000-100,000	100,000+
Total Net Absorption	0	-6,095	-33,041	197,246	273,408	909,142
Annual Average	0	-871	-3,304	19,725	45,568	101,016
Average Vacancy	4.7%	2.9%	2.2%	3.0%	5.3%	2.0%
Average Availability	5.2%	2.7%	3.9%	4.2%	4.6%	3.9%

Quality Rating of Office Premises, Hemel Hempstead

	Quality Rating		
	4* & 5*	3*	1* & 2*
Number of Buildings	5	82	96
Current Vacancy	1.9%	10.5%	10.5%
Current Availability	1.9%	11.4%	10.5%

Source: CoStar commercial property database

Place | Town Centre

Key Points

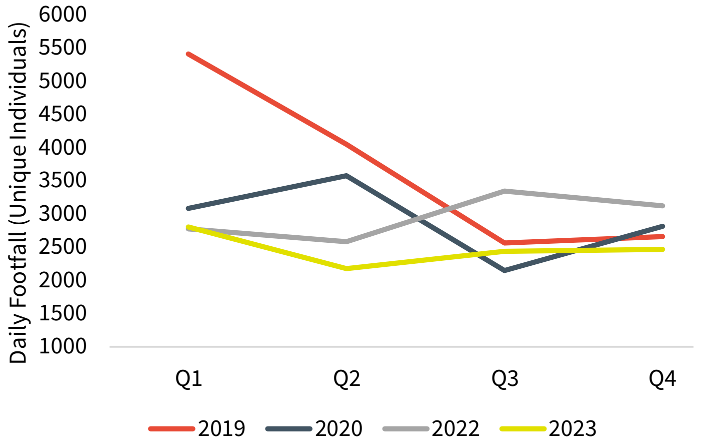
- Town centre and Hemel Old Town footfall has not yet returned to pre-pandemic levels, and was lower in 2023 than 2022
- 2022 data suggest a 'bounce back' from the pandemic as restrictions were eased but this has not been sustained
- Retail and office property data suggest low levels of additional occupancy of floorspace in the town centre

HUQ data for Dacorum Borough Council shows a town centre under pressure reflecting the continued contraction of retail and office activity over time, and the significant adverse impacts of the pandemic, most notably with contraction in the amount of retail space occupied versus vacated in 2021.
Footfall data for other smaller town centres in Dacorum (Berkhamstead and Tring) also shows that volumes have not returned to pre-pandemic levels. However, both have performed much more strongly than Hemel in terms of change in footfall relative to the East of England, underlining Hemel's apparent weakness.

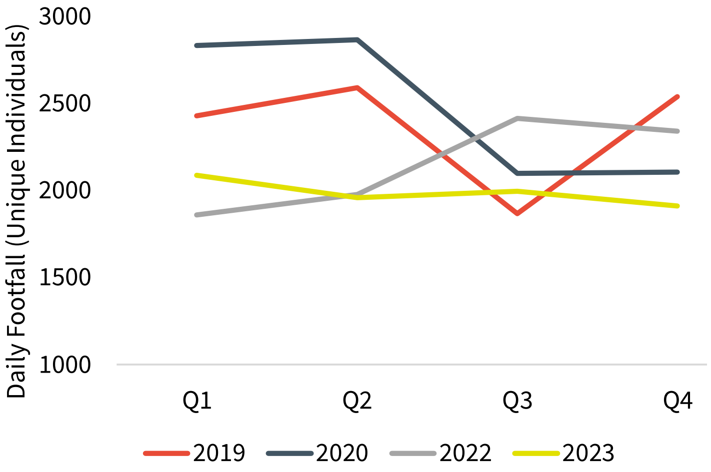
These challenges and solutions have driven Hemel's Town Centre Vision, which points to measures including:

- An enhanced culture and leisure offer to attract people to the town centre and boost a failing evening economy
- The need for a 'multi-purpose' town centre which blends retail, hospitality, housing, education, health and other services
- Provision of co-working space to provide employment and support retail
- Improved access through public transport and active travel
- The need to tackle crime and improve safety in the town centre

Daily Footfall, Hemel Town Centre



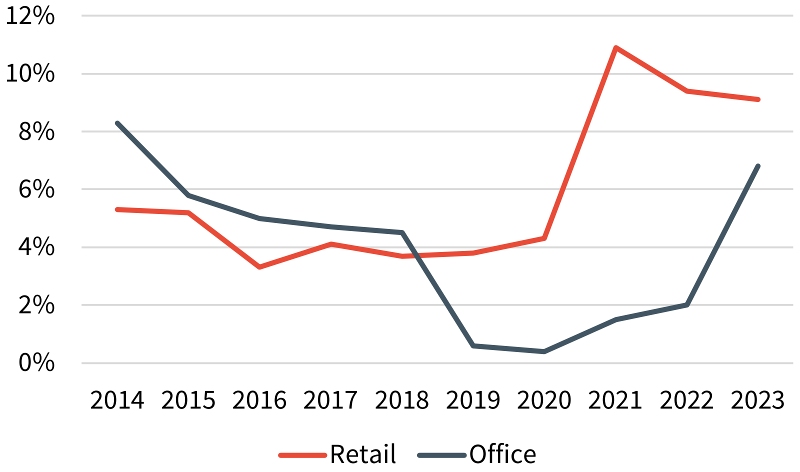
Daily Footfall, Hemel Old Town



Source: HUQ, Quarterly Performance Report, 2023

Net Absorption, Retail and Offices, Town Centre 2014-23

Retail and Office Vacancy, Town Centre 2014-23



Source: CoStar commercial property database

Place | Arts, Cultural and Leisure Offer

Key Points

- Hemel Hempstead's lack of strong cultural and leisure offer is recognized by the Town Centre Vision as a key challenge for the town as a place to live and visit.
- On several measures, Hemel lags behind similar sized towns in its arts, cultural and recreational offer.

Hemel's Town Centre Vision and the analysis which underpins it is clear about Hemel town centre's weaknesses: it lacks cultural and leisure facilities, has seen reduced footfall, has a weak evening economy and is perceived at night-time to be an unsafe place. This underlines the vacancy evidence presented earlier in this report which points to high vacancy rates in retail and office premises which have not recovered to pre-Covid 19 levels, at a time when town centres across the UK are facing similar challenges.

Whilst the new town centre and Hemel Old Town have a small number of arts and cultural venues (for example, 110 capacity Old Town Hall), restaurants, cafes and bars, the range available and their setting in the new town do not give it the draw of more attractive centres in the wider area, including towns within Dacorum. In short, as the visitor data suggests, Hemel town centre is not attracting enough residents from the town itself, nor giving visitors from outside the town good reasons visit.

In research cited by the Town Centre Vision for Hemel Hempstead (2023), the town ranked 109th of 110 towns or cities in a post-Covid vulnerability index produced by KPMG. The report identified Hemel as one of the places 'hit relatively hard by the loss of commuter footfall and retail offering…while have more limited cultural offering to attract people to their centres. Whilst Hemel score better than other similar sized towns in the for some aspects of its arts, culture and leisure offer, overall it is assessed as being significantly more vulnerable than those places.

Separately, data from the ONS on employment in Hemel Hempstead in sub-sectors including arts and performance facilities, sports and fitness facilities including clubs, restaurants, museums and libraries shows that Hemel Hempstead lags behind similar sized towns or cities in the wider area. As a ratio of jobs to 1,000 residents, Hemel has the lowest ratio of towns or cities including High Wycombe, Stevenage and St. Albans.

Arts, Culture and Leisure Employment per 1,000 Residents

Town	Arts, Culture, Leisure and Sports Employment per 1,000 residents
Hemel Hempstead	17.2
High Wycombe	22.3
Stevenage	26.2
St. Albans	22.8

Source: ONS, Business Register and Employment Survey, Mid Year Population Estimates

Strength of Visitor Assets Offer and Overall Vulnerability post-Covid 19

Town	Sports Facilities	Culture and Recreation	Food and Drink	Overall Vulnerability
Hemel Hempstead	-0.34	-0.61	-0.86	-1.80
High Wycombe	0.04	-0.78	-0.88	-0.23
Stevenage	-0.34	-1.20	-0.66	-0.37
St. Albans	0.08	-0.59	-0.32	-0.23

Source: KPMG (2021) The Future of Towns and Cities Post Covid 19

Place | Housing Tenure

Key Points

- Highest concentrations of households in private rented housing in and around the town centre, and on the town's central spine
- Several localities have more than 35% of households living in private rented housing
- Households in social rented housing are distributed across the town, with higher concentrations in central areas, and numerous localities with more than 35% of households in this tenure
- Hemel has a significantly higher share of social rented households than all the comparator areas

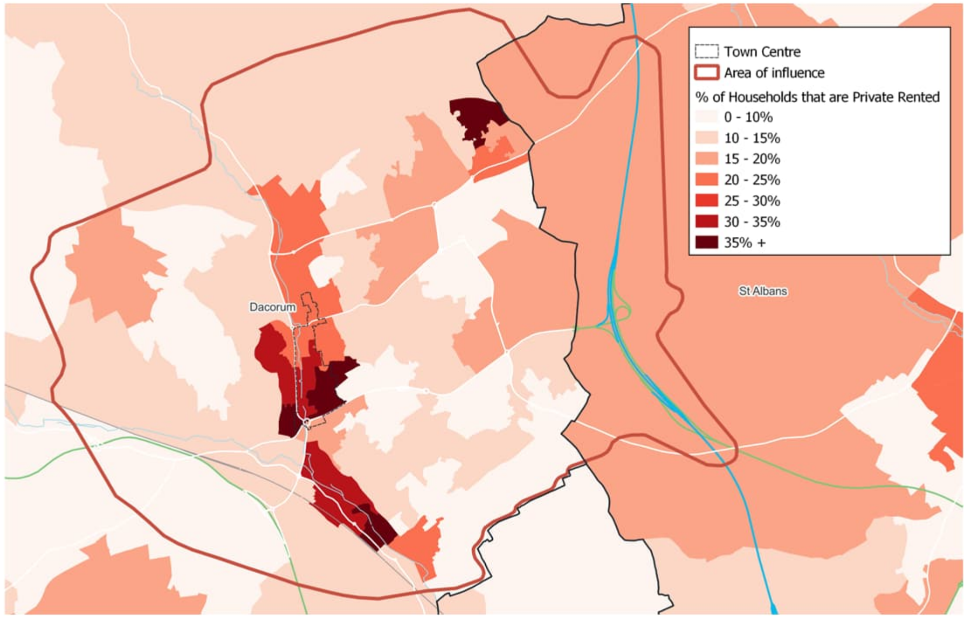
Households in private rented accommodation are clustered in the centre and south central Hemel Hempstead. These are localities in which the evidence points to high rates of population churn, and to social challenges including deprivation and poorer health and wellbeing indicators.

High proportions of households in social rented housing across Hemel Hempstead reflect its history as a new town, with Council housing a major feature of the town's development during the 1950s. In recent years Dacorum borough has continued to be active in delivering both Council homes and generally affordable homes, with around 1,800 affordable homes delivered between 2006 and 2020. The Council itself delivered 285 homes between 2013 and 2020, the substantial majority of which (230) were in Hemel Hempstead. This reflects the priority given to meeting needs for affordable housing during a period when housing affordability has significantly worsened across the UK, and in a town in which there is a higher than average representation of households on low incomes.

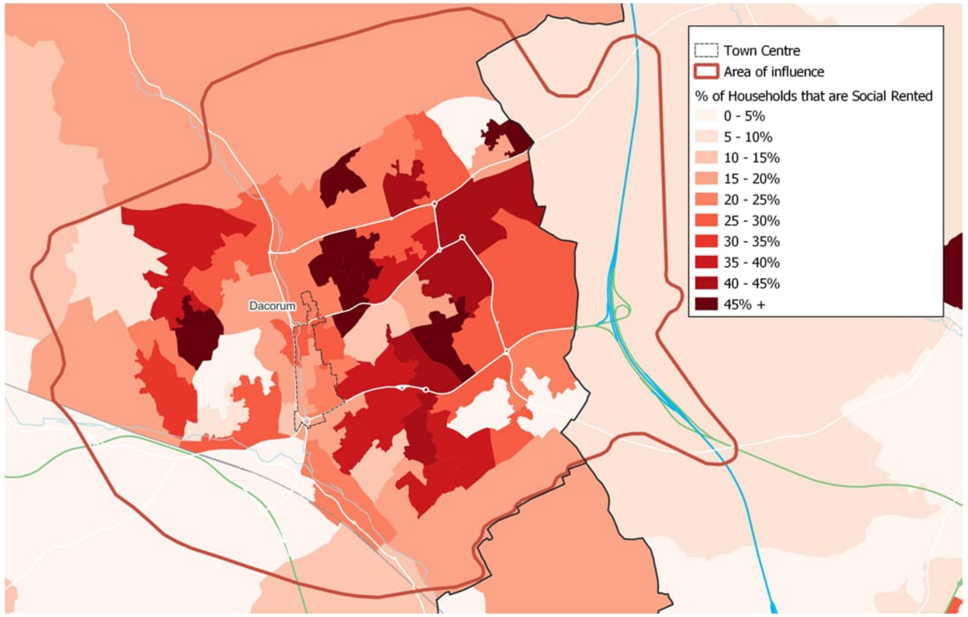
Households by Tenure, 2021

	% Owned	% Social Rent	% Private Rent
Hemel Hempstead	59%	26%	15%
Dacorum	65%	21%	14%
St. Albans	71%	12%	16%
Hertfordshire	66%	18%	17%
England	62%	17%	20%

Privately Rented Households, Hemel Hempstead



Social Rented Households, Hemel Hempstead



Source: Census, ONS 2021

HATCH

Place | AHAH Neighbourhood / Place 'Health'

Key Points

- Analysis of AHAH data for Hemel Hempstead's AOI's 58 LSOAs measures how 'healthy' places and neighbourhoods are.
- Those LSOAs with the worst performing AHAH score are geographically concentrated in and around the Town Centre and the Maylands Business Park area.
- It is important that inequity does not arise within Hemel between residents' access to good quality and mix of services in new local centres with HGC in comparison to some existing local centres.

The AHAH (the index of 'Access to Health Assets and Hazards') is a multi-dimensional index developed by the Consumer Data Research Centre (CDRC) for Great Britain measuring how 'healthy' neighbourhoods are. The AHAH index combines indicators for four different measures:

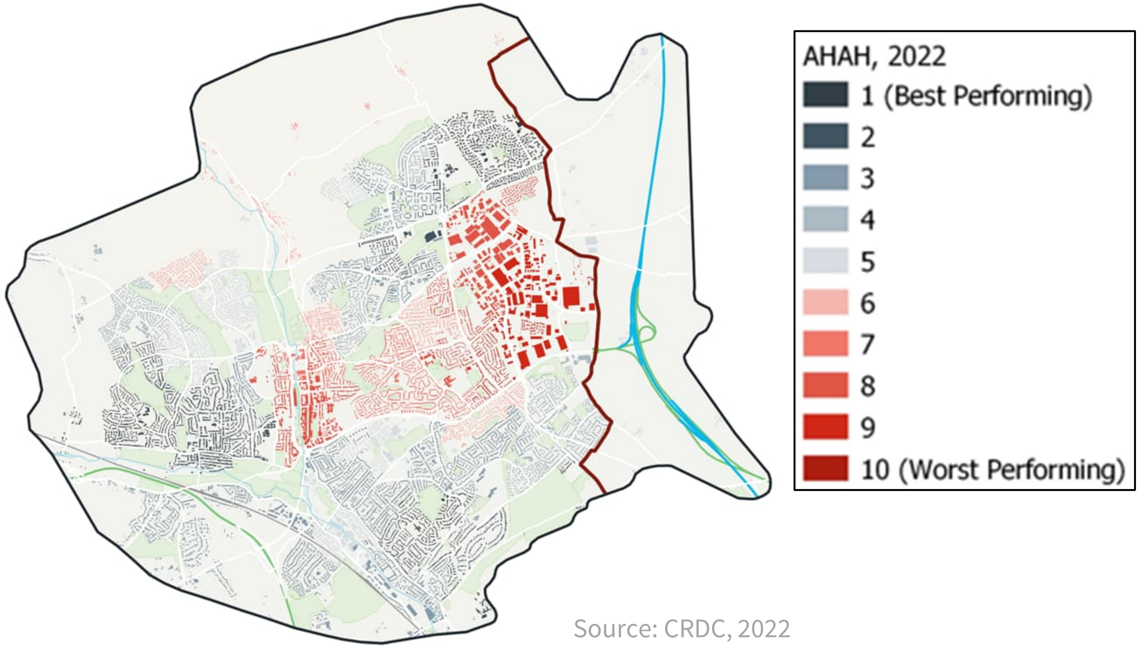
- Retail environment (access to fast food outlets, pubs, tobacconists, gambling outlets),
- Health services (access to GPs, hospitals, pharmacies, dentists, leisure services),
- Physical environment (Blue Space, Green Space - Passive), and
- Air quality (NO_2, PM10, SO_2)

For Hemel Hempstead, the AHAH data for 58 LSOAs was analyzed within the AOI and mapped for those AHAH scores within the best performing deciles to the worst performing deciles.

While the data shows a relatively positive picture for Hemel Hempstead in overall terms, with only one of the LSOAs having an 'unhealthy' index score in the top 20%, poorer performance is geographically concentrated in and around the Town Centre and communities in the east central area. Poorer performance in those areas is primarily driven by access to 'unhealthy' retail services. Although smaller in number, there are a two LSOAs are in the worst performing 20% of LSOAs which score poorly in terms of access to health service and physical environment.

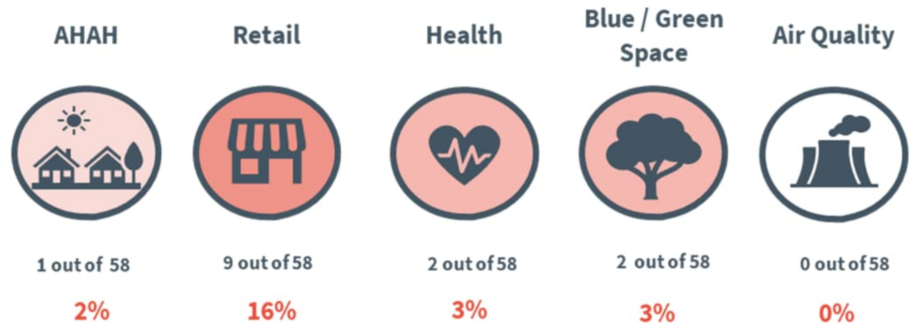
Given the focus on developing high quality and accessible new local centres within HGC, there is a need to ensure that issues within existing local centres are also addressed to mitigate the risk of inequity of access to services and facilities between neighbourhoods and residents within Hemel.

Access to Healthy Assets and Hazards, 2022



Source: CRDC, 2022

Number of LSOAs in the AOI which are in the worst performing 20%



Place | Residential Churn

Key Points

- Highest churn in resident population of Hemel Hempstead is concentrated in the town's central spine and in east central communities
- Several areas have 5 year churn in excess of 45% of the population, with others in excess of 30%

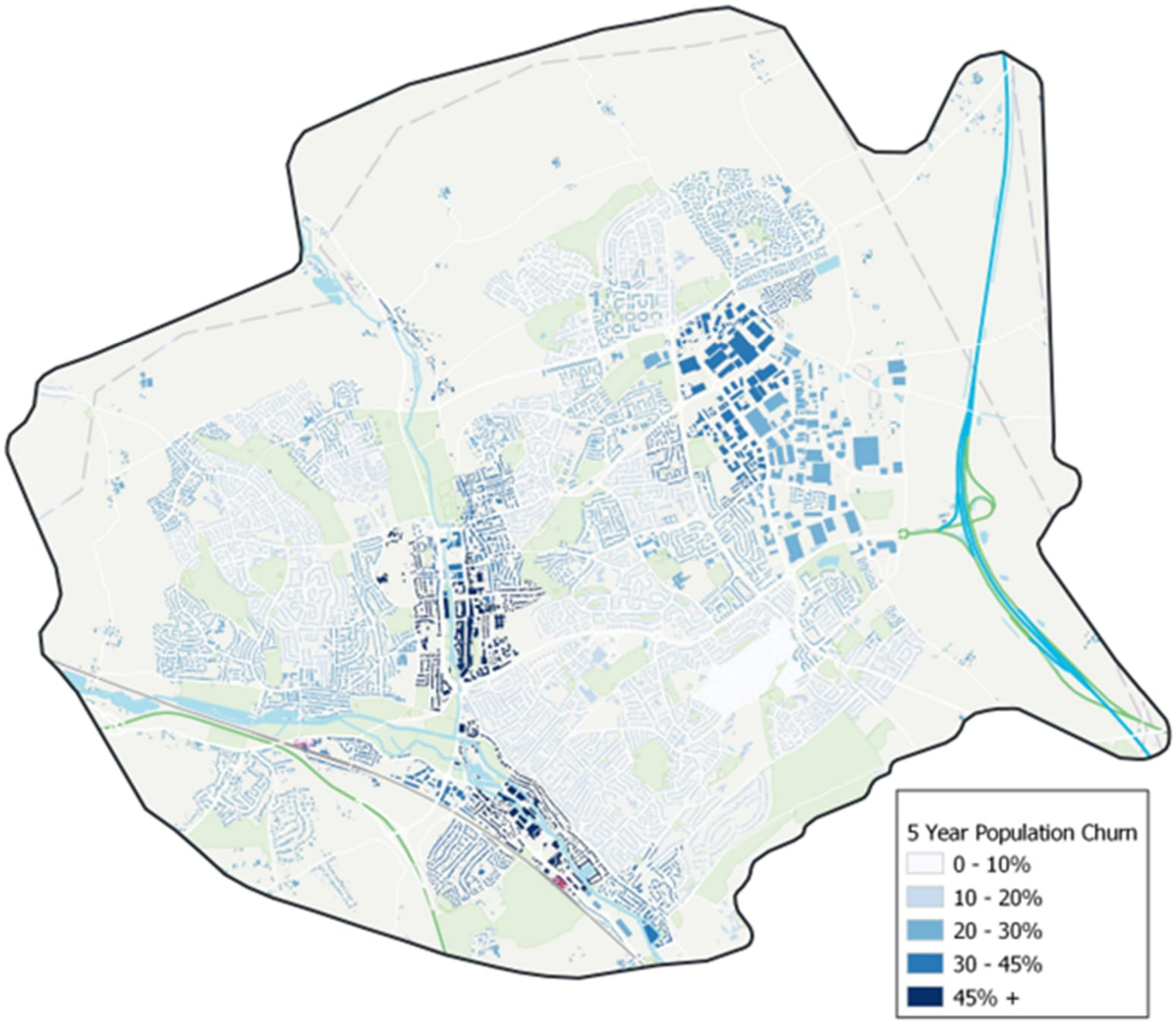
Residential churn data shows the pattern of households who have moved within a given period, drawing on a range of administrative data sources.

For the 5 year period 2018-23 the data shows distinctive spatial patterns of churn that are consistent with the picture throughout this report. The highest levels of churn are found in and around the town centre and in areas to the south, with higher proportions of household moves also in the central eastern area of the town. These are typically younger households which are more likely to be living in rented accommodation, and in lower household income bands based on analysis elsewhere in the report.

Areas with the highest levels of churn (45%+) can be characterized as having transitory populations whose housing, employment and income circumstances may combine to result in them being unable to establish stronger roots in those locations. It should also be recognized that high levels of turnover are more likely in younger and more mobile populations. There are also likely to be Covid-19 pandemic effects in the data, with 2020 and 2021 seeing significant disruption to populations, including increases in redundancies.

This evidence may point to a need to diversify the housing stock in high churn localities, broadening the range of tenures they offer. With the town set for future employment growth, attracting and retaining a younger workforce

5 Year Resident Population Churn, 2018-23



Source: Consumer Data Research Centre, 2024

Key Points

- Hemel Hempstead is a highly car dependent town, with high levels of car ownership and cars per household, and lower levels of public transport and active travel mode uses.
- The town experiences congestion, particularly at key times of the day, a lack of non-car connectivity between key nodes, plus associated issues of severance and safety concerns.

Hemel Hempstead is highly car dependent town. Car use is more convenient for many, with rail stations at Hemel Hempstead and Aspley some distance from the town centre and Maylands. While there is a bus network, the most frequent services are in the north-east and south of the town. Data highlights low public transport accessibility and usage by residents.

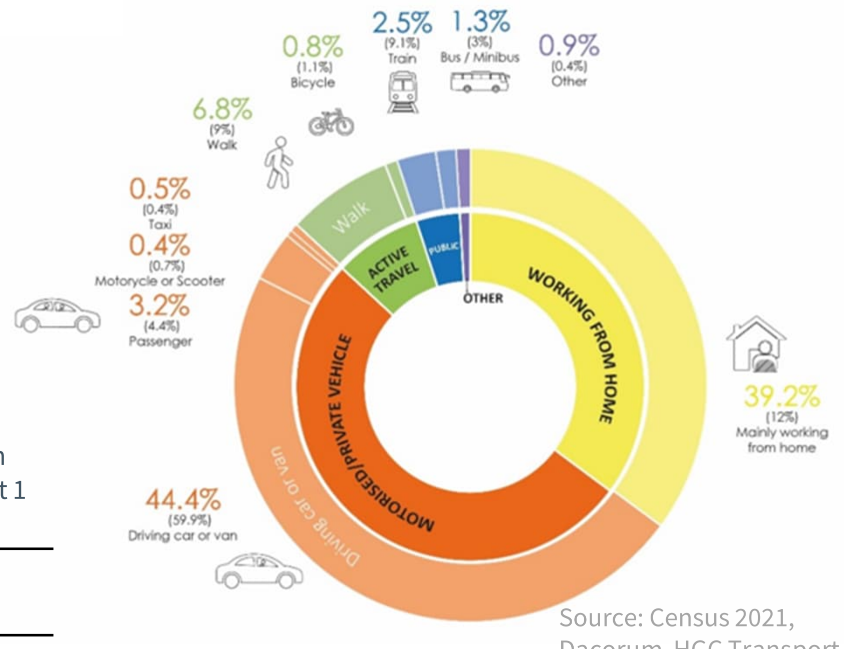
WSP, using Census 2021 data for Dacorum as a baseline for Hemel and HGC, estimated that 80% of commuting journeys to work are undertaken using a car, with only 12% using active travel options and 6% public transport. Census 2021 journey to work data (including those who are classified as home workers) showed that Hemel Hempstead has a larger proportion of residents travelling to work by car (52% compared to 48% across the Dacorum area).

Car ownership in Dacorum is the second-highest across Hertfordshire (91% of households with access to at least 1 car), while the borough has the highest number of cars per household (1.47 cars). Evidence from Hertfordshire County Council's latest mobility surveys on trip in-flows, shows that vast majority (83%) of inbound trips to Hemel Hempstead are made via Private Car with 10% of trips made using sustainable modes of transport (bus, walk, train and cycle). The HCC data also shows that over half of all internal trips are made using a private vehicle (58%), with trips made on foot accounting for 24% of the share. Bus (5%) and cycle trips (2%) are low considering large areas of the study area can be reached by both cyclists and bus users in less than 30 minutes.

Given high car-based trip generation/mode choice, Hemel Hempstead suffers from congestion at key times. The HGC Transport Vision 2050 document highlights congestion on Breakspear Way, 'rat running' near Apsley to avoid the A41, and poor east-west connectivity between Hemel Hempstead station, the town centre and Maylands Business Park.

Hemel Hempstead also has relatively high pedestrian and cycle collision levels compared to the borough level. Between 2017 and 2021, 5 fatalities involving either a pedestrian or cyclist occurred, as well as sixty serious collisions (DfT 2017 – 2021). The 2022 Hertfordshire Travel survey showed that 25% of Dacorum respondents cited provision of cycle infrastructure and cycle safety as a key transport issues in the borough.

91%	Households with access to at least 1 car
1.47	Cars per household
5	Fatalities (2017-21) pedestrians or cyclists



Source: Census 2021, Dacorum, HGC Transport Vision 2050

	Driving a car or van	Work mainly at or from home	On foot	Passenger in a car or van	Train	Bus, minibus or coach	Bicycle	Other method of travel to work	Taxi	Motorcycle, scooter or moped	Underground, metro, light rail, tram
Hemel Hempstead	48.2%	34.0%	7.0%	3.7%	2.0%	1.7%	0.9%	0.9%	0.7%	0.5%	0.4%
Dacorum	44.4%	39.2%	6.8%	3.2%	2.1%	1.3%	0.8%	0.9%	0.5%	0.4%	0.4%
St Albans	31.9%	53.0%	6.0%	2.0%	3.4%	1.0%	1.0%	0.7%	0.3%	0.3%	0.3%
Hertfordshire	41.4%	39.4%	6.9%	3.0%	3.4%	1.7%	1.2%	0.9%	0.5%	0.4%	1.2%
East	47.7%	31.9%	7.3%	3.8%	2.3%	2.0%	2.3%	1.0%	0.6%	0.5%	0.6%

Source: ONS Census 2021

HATCH

Place | Transport Constraints and Modal Shift Opportunities (2)

Key Points

- Modal shift is key to ensuring Hemel Hempstead can sustainable accommodate significant new residential and employment growth and tackle long-standing transport issues in the town.
- Key to achieving this shift is in the building upon existing active travel infrastructure, developing safe and accessible walking and cycling routes linking existing and new residents to local centres, the town centre and employment sites.

A new approach which encourages a transformational shift in modal choice amongst existing and new residents is required to meet HGCs sustainable growth ambitions

The aim of the HGC spatial vision is to ensure:

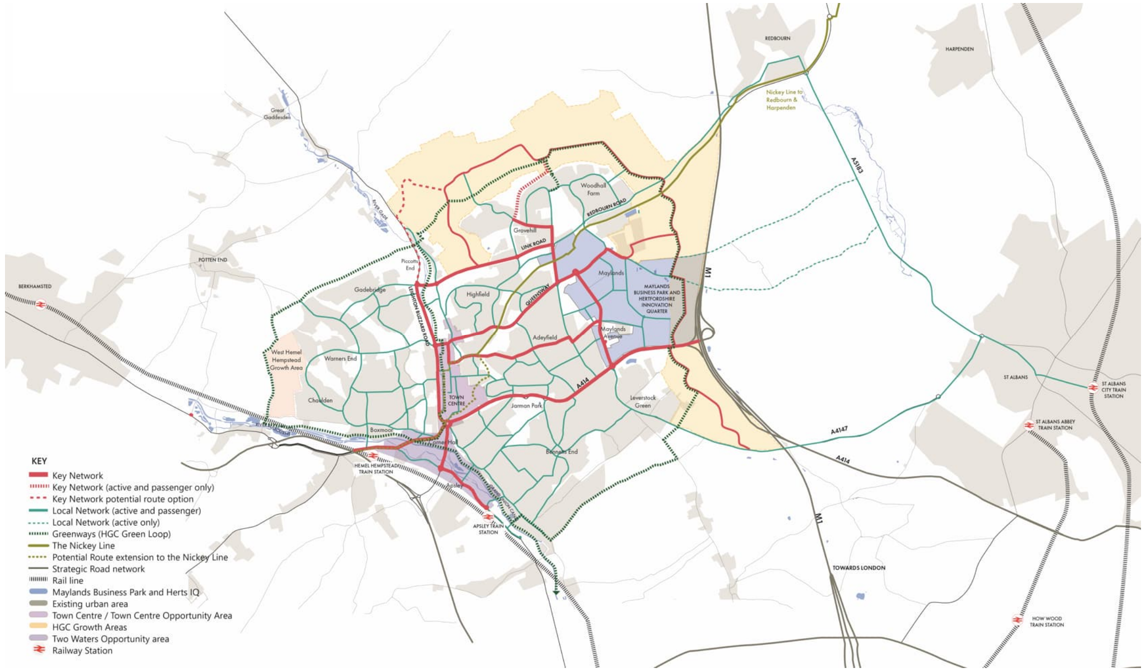
- **40%** of all trips starting and/or ending in the existing settlement area of Hemel Hempstead are by active and sustainable travel modes, and
- **60%** of all trips starting and/or ending in the new development of HGC growth area are by active and sustainable travel modes.

WSP undertook analysis to understand how realistic and practical this scale of modal shift is for Hemel Hempstead. It considered:

- The **sustainable travel opportunity** i.e. estimates of the number of modelled car trips that can use sustainable modes (walking, cycling or public transport).
- The **sustainable travel propensity,** the likelihood that a resident or household will use or switch to walking, cycling, bus or rail, and is benchmarked against the England average
- The **sustainable travel potential** estimates car trips that could be made using sustainable modes – considering the opportunity and propensity findings.

The level of switch required in Hemel Hempstead is a shift from 18% Active Travel and Public to 46%. This analysis is based on existing transport links and socio-economic characteristics – with Hemel having a higher proportion of residents in the 'Aspiring Homemakers' and 'Family Basics' MOSAIC group. It is anticipated the HGC area will attract similar socio-economic groups with higher propensity for active and sustainable travel modes.

Potential interventions to deliver a network of 'local and key' routes as part of an active travel network for Hemel include building on existing routes (e.g. Nickey Line, the Grand Union Canal and road active travel links), to better connect key nodes (local centres, the town centre, train station and employment sites), and encourage increased use amongst existing and new residents and achieving the HGC's modal shift targets. Beyond Hemel, continuing work to develop proposals for a Hertfordshire-Essex Rapid Transit scheme (HERT) connecting Hemel to Harlow and alleviate problems on the A414 corridor are moving forward.



Source: WSP, Transport Vision 2050

Source: DK-CM, Transport Vision 2050

HATCH

Place | Green Space in Hemel Hempstead

Key Points

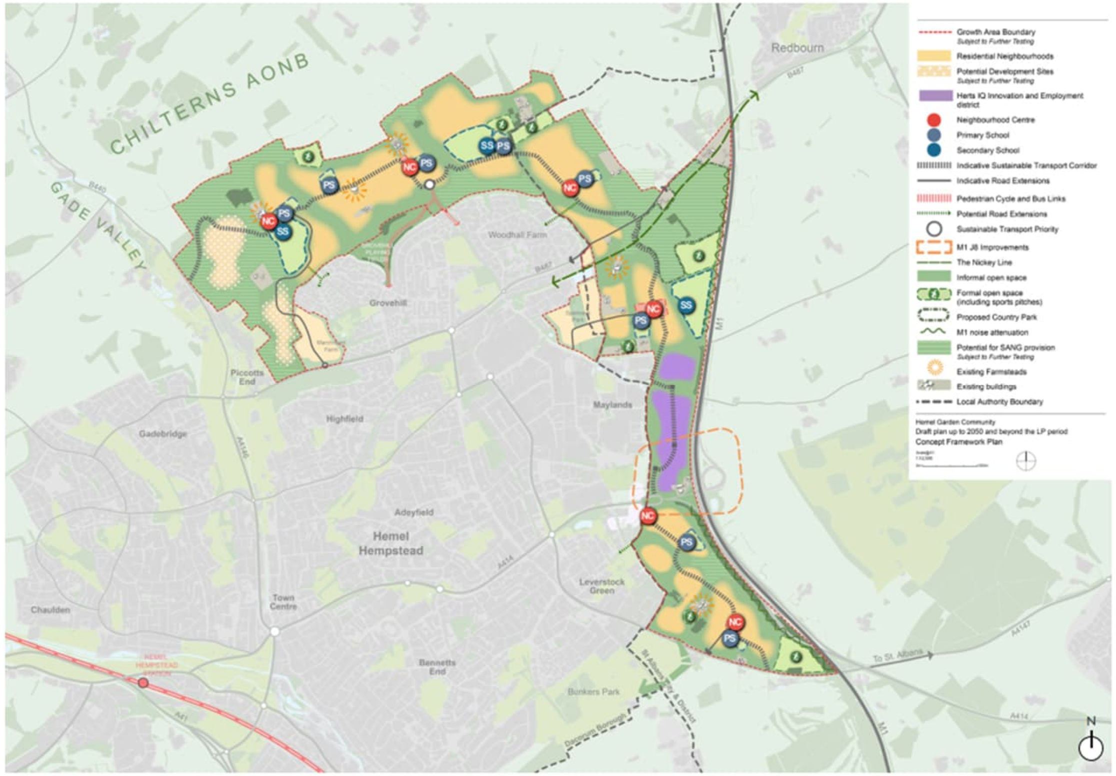
- Hemel residents, on average, live closer to greenspaces (parks, gardens and playing field) and have access to larger than average spaces – green spaces are approximately 40% larger in area than the borough average.
- Access to greenspaces was a key principle in the development of Hemel Hempstead as a New Town. This forms a significant part of the proposals for HGC growth, as well as greenspaces playing key roles in supporting active travel routes and biodiversity objectives.

Residents within the Hemel Area of Influence (AOI), on average, live 0.26km from public green space, while the average in Dacorum is 0.31km and c.0.4km regionally and nationally. In addition, the average size of greenspaces within Hemel's AOI is around 40% larger than the borough average (0.09km² compared to 0.06km²).

Proximity to green spaces, as well as the number and scale of green spaces, reflects the original spatial planning objectives within the New Town development era. In a 2023 Vitality Index produced by Lambert Smith Hampton, Hemel Hempstead was ranked 5th of the UK's 100 largest urban areas in its health and environment index, and was identified as one of the fastest rising towns, in part attributed to the amount of green space in the town per resident (source: 2023 UK Vitality Index).

Source: OS, 2023

This is a key underpinning principle for Hemel as part of the HGC growth proposals. The importance of access to green spaces is recognized in the plan, as well as the importance of connecting residents to green spaces through new and enhanced active travel connections.



Source: HGC, Position Statement, 2023

Location	Average distance to nearest Park, Public Garden, or Playing Field (km)	Average size of nearest Park, Public Garden, or Playing Field (km2)
Hemel Hempstead	0.26	0.09
Dacorum	0.31	0.06
St Albans	0.27	0.06
East	0.43	0.09
England	0.39	0.09

Source: ONS, 2020. Distances rounded

Place | Summary: Implications for Hemel Hempstead

Strengths and Opportunities

- Strong industrial property market reflecting scale of investment in developments for logistics, distribution and other industrial uses, driven by businesses of all sizes.
- Evidence of demand for industrial and office ‘grow on’ space consistent with the size and characteristics of Hemel business base, with low vacancy suggesting supply may not be meeting need currently and so more may be required in future.
- Some positive indicators on demand for smaller office premises, with low current vacancy rates pointing to demand which is likely to be fuelled by local businesses.
- Many of Hemel’s residents benefit from its new town history, with accessible green space for leisure and recreation well-distributed through the town and (on average) larger green spaces than settlements in the wider area.
- Positive signals about the potential for Hemel Hempstead to accelerate modal shift from private vehicle to active travel, with survey data showing a quarter of internal trips are walkers, and some infrastructure already in place (e.g. Nickey Line, canal) to support additional walking and cycling for work, leisure and services.
- Recognition of need for action to regenerate Hemel Town Centre and encourage more residents and visitors to use already embedded in Town Centre vision, focusing on diversification (residential, culture and leisure, food and drink, public services).

Weaknesses and Challenges

- Low vacancy rates for industrial premises, including smaller sized premises suited to micro and SMEs. This may be a future constraint to business growth and inward investment if it persists.
- Evidence points to weakening demand for office space, particularly for larger premises. This may be a short term consequence of the Covid 19 pandemic and homeworking trends, but evidence suggests a permanent shift in some sectors (professional services, ICT) and office-based businesses evaluating future needs for larger office premises.
- Significant areas of central Hemel Hempstead in which the housing supply is predominantly private rented and social rented housing, aligning with areas in which resident communities are more likely to face deprivation, unemployment, and related health and wellbeing problems
- High rates of residential churn in central spine and eastern Hemel, suggesting residents less able to put down roots in the town. Areas with high churn are also those more likely to experience deprivation and related socio-economic challenges.
- Heavily car dependent town with substantial majority of trips for work, leisure and services within Hemel made by private vehicle and apparently limited use of bus services.
- Hemel station and Apsley station are not well located for pedestrian access to the town centre (c. 1 mile) or to Maylands business area (c. 3 miles) and (in future) to new employment premises in East Hemel.

4 Conclusions and Recommendations

Conclusions: Strengths, Opportunities and Implications for Economic Vision

Strengths and Opportunities	Implications for Economic Vision
Young and growing population generates a future resident workforce to underpin Hemel's sustainable economic growth and socio-economic resilience; 19,900 new homes in Hemel Hempstead by 2050, including 10,500 homes could accommodate 48,000+ residents	• Need to deliver range of employment opportunities across occupational spectrum but also raise quality of jobs (pay levels, skills) that encourage local living and working, and which attract people to settle in the town • Pathways to skills, training and employment should be developed for resident working age population linked to priority sectors.
Potential to deliver 19,900 new homes in Hemel to 2050 gives significant opportunity to diversify the town's housing supply	• Delivery profile of future housing on HGC sites and other sites across the town must provide wide choice of homes including starter homes for ownership, family housing with space, aspirational homes, build-to-rent and affordable homes.
Recent growth of home and hybrid working creates opportunity for accelerated transition to sustainable living and working pattern in Hemel, and potential for more 'home grown' businesses if home-based entrepreneurs look to graduate to workspace in the town	• Need for investment in new and improved cultural and leisure facilities to encourage residents to spend time and money in the town centre and in local centres • Homes and infrastructure need to be planned for home working, including comprehensive gigabit and 5G digital infrastructure, flexible workspaces catering for hybrid workers, facilities and services close to housing
Lack of future demand for larger scale office accommodation may present opportunities for redevelopment for alternative employment or other uses, including smaller scale modern, flexible office and workspace	• If objective is to encourage business formation and growth locally, and capitalise on growing population and increase in hybrid and home working, sites and buildings that come forward for redevelopment could be considered for workspace geared to micro and small businesses
Strengths in priority and growing sectors in Hemel, with appetite and capacity to attract knowledge-intensive activity including science and R&D, and evidence of innovation active companies in the town	• East Hemel employment site key to delivering facilities to accommodate mix of uses which could include grow on space for agritech and life science businesses, incubator or starter units for micro businesses, collaborative innovation spaces or potentially a higher education presence. Likely to require public sector co-investment to deliver facilities.
Construction programme for HGC and East Hemel will generate thousands of construction jobs and linked opportunities in supply chains	• Potential to establish Hemel Hempstead as an exemplar for sustainable construction, with potential for town to be a location for development and testing of materials for use in new homes, recycling and reuse of materials • Early investment in construction skills development and supply chain readiness, including potential for a sustainable construction skills hub (East Hemel?)
Some key infrastructure already in place to support shift to active travel and HGC proposals will drive investment in improved network and infrastructure	• Green loop proposals, potential for mobility hub development through HGC and improvement of Nickey Line and Grand Union canal routes will encourage take-up of active travel routes across and around the town • Key will be targeted investment in public transport services linking new and existing communities to town centre and expanded employment areas, and connections to stations for inbound and outbound travellers
Proposals to diversify and regenerate town centre already embedded in policy and population growth will support transformation. Many of the 48,000 residents of new homes may be new to Hemel, providing a significant boost to spending in the town and use of facilities.	• Connectivity to town centre from new HGC communities and incentives for residents to use town centre through improved retail, leisure and service provision will be key success factors. • Improving the town centre's offer to residents of HGC and Hemel generally will be key to its regeneration. Priorities in the Town Centre Vision, including arts and cultural activities and other leisure facilities, a bigger and improved food and drink offer, new housing development and investment in public realm would help to maximise the draw on a growing population.

Conclusions: Weaknesses, Future Challenges and Implications for Economic Vision

Weaknesses and Challenges	Implications for Economic Vision
Household income and workplace earnings data point to lack of higher paid, higher skilled work available in the town	• Need to deliver range and quality of employment that attracts younger people to settle in the town, or to choose to seek local employment in future • Targeted investment in skills development driven by priority growth sectors
Entrenched inequality in the town with high and persistent concentrations in central and east central Hemel of deprivation, poor health and wellbeing	• Continued action to tackle health challenges faced by residents in these communities, improve access to employment and better quality employment opportunities • Need to target intervention in education and skills development for children and adults aligned with growth of existing and new employment
Evidence of areas of central and eastern Hemel Hempstead in which there are very high concentrations of social rented housing stock, in areas whose communities also have the highest levels of deprivation	• Delivery of housing and infrastructure across Hemel which diversifies and raises the quality of the living environment, services and facilities in the most deprived areas • Potential to deliver broader mix of homes on new sites, bringing new investment into these locations, with potential to pursue through planning policies on requirements for future allocated sites
High turnover of residents appears to be concentrated in areas with substantial private rented housing	• Consider how planning policy on private rented housing, including HMOs, could be directed to seeking to raise the standard of some of Hemel's private rented housing supply
Under-performing town centre with struggling retail sector evident in high vacancy rates, a lack of an evening economy, poor quality built environment and public realm, and a lack of arts and cultural activities	• Underlines the need to realise the Town Centre Vision, and delivery of regeneration proposals must focus on expanding leisure offer, improving built environment and delivering more housing and commercial activity alongside retail
Falling business birth rate and rising death rate in Dacorum point to tough economic conditions in which to start and stabilise a new business. May be a short-term issue, but reduces contribution of new enterprise to job creation and prosperity in the town	• Multiple factors to be addressed, including risks of setting up a new business during difficult economic conditions in the UK, availability and cost premises etc. underline the importance of support for enterprise through national and local programmes.
Lack of supply of good quality, smaller office and industrial floorspace may be a constraint on future economic growth.	• Potential to deliver grow-on space and small, flexible workspaces as part of development of East Hemel site • Consider provision of micro and small business space on other opportunity sites and as part of repurposing of town centre buildings
Car dependency, low levels of public transport use in the town and poor connections from stations to town centre and employment areas	• Underlines the importance attached to delivering a comprehensive active travel network for Hemel, and the need to secure investment in both public transport services across the town and to stations