EVIDENCE BASE

SOUTH WARWICKSHIRE ECONOMIC STRATEGY

Prepared by

Performance, Consultation and Insight Unit

Stratford-on-Avon District Council

Contents

List of Tables

List of Figures

Economy

Income

Gross Value Added (GVA) is a measure of the value of the economy due to the production of goods and services. GVA is a very important measure, because it is used to determine gross domestic product (GDP). The relationship between GVA and GDP is defined as:

GVA= GDP +Subsidies on products – Taxes on products

The annual release of the GVA data is an important indicator of the performance of areas at different levels of geography: regional, sub-regional and local authority level. It measures the contribution to the economy of each area, as well as by industry or sector.

As we can see from Table 1 below, the economy of Stratford-on-Avon District for 2020 was worth £4.59 billion, while Warwick District's economy was worth £6.23 billion. These figures are larger than those of all other authorities within Warwickshire except for Coventry.

Growth in GVA between 2010-2019 stood at 70% for Stratford-on-Avon and 61% for Warwick; this compares to growth of 39% for the UK as a whole, 37% in the West Midlands and 49% in Warwickshire.

The onset of the Covid-19 pandemic in 2020 had a significant impact on GVA across all levels of geography, with a 12% reduction in GVA for Stratford-on-Avon and 4% in Warwick.

Table 1: TOTAL GVA (£ooo, ooo's)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
United Kingdom	1,452,645	1,491,242	1,539,250	1,601,614	1,674,387	1,727,643	1,799,292	1,872,421	1,942,619	2,017,344	1,949,605
England	1,234,523	1,265,226	1,309,394	1,364,523	1,433,001	1,488,257	1,552,839	1,612,495	1,669,550	1,735,881	1,682,752
West Midlands	102,550	105,795	109,196	114,658	120,082	125,032	131,144	137,163	142,316	145,969	140,282
Warwickshire	12,440	13,039	13,718	14,952	15,854	16,813	17,272	19,087	19,618	19,863	18,578
Stratford-on-Avon	**3,056**	**3,235**	**3,472**	**3,883**	**4,004**	**4,188**	**4,374**	**5,011**	**5,196**	**5,204**	**4,589**
Warwick DC	**4,043**	**4,209**	**4,265**	**4,785**	**5,145**	**5,609**	**5,817**	**6,366**	**6,313**	**6,517**	**6,234**
Coventry	6,932	7,170	7,789	8,104	8,596	9,415	10,024	9,803	9,840	10,181	9,941
North Warwickshire	1,816	1,899	2,106	2,239	2,316	2,463	2,387	2,704	3,013	3,064	2,846
Nuneaton & Bedworth	1,347	1,423	1,526	1,685	1,875	1,917	1,872	2,005	2,115	2,220	2,135
Rugby	2,178	2,272	2,349	2,360	2,514	2,637	2,822	3,001	2,981	2,858	2,774
Solihull	5,774	5,949	6,057	6,352	6,730	7,582	8,675	9,295	9,954	10,257	9,324
Wychavon	1,966	2,104	2,207	2,232	2,376	2,523	2,558	2,726	2,901	3,048	2,986

Source: ONS Regional Gross Domestic Product – all ITL regions/local authorities release May 2022

Productivity

The productivity of a region can be estimated using GVA per hour. This is preferable to the more typically used GVA per head of population measure, which fails to take account of commuting into and out of a region, and regions with high proportions of economically inactive people i.e. predominantly old or young populations.

GVA per hour: indices

Indices are a way of comparing the productivity of different geographies, with the UK average based at 100. Any score higher than 100 is therefore more productive than the UK average, and vice versa. The highest index figure in 2020 in the UK at a local authority level was for Rushmoor, at 196.0. Tower Hamlets and City of London had previously been the most productive authorities (2018), with index figures of 189.5 and 183.2 respectively.

Stratford-on-Avon's productivity has grown from a point below the UK average in 2008 to well above by 2017. This saw a fall between 2018-19, with a significant drop in 2020 as Covid impacted the economy (see Figure 1).

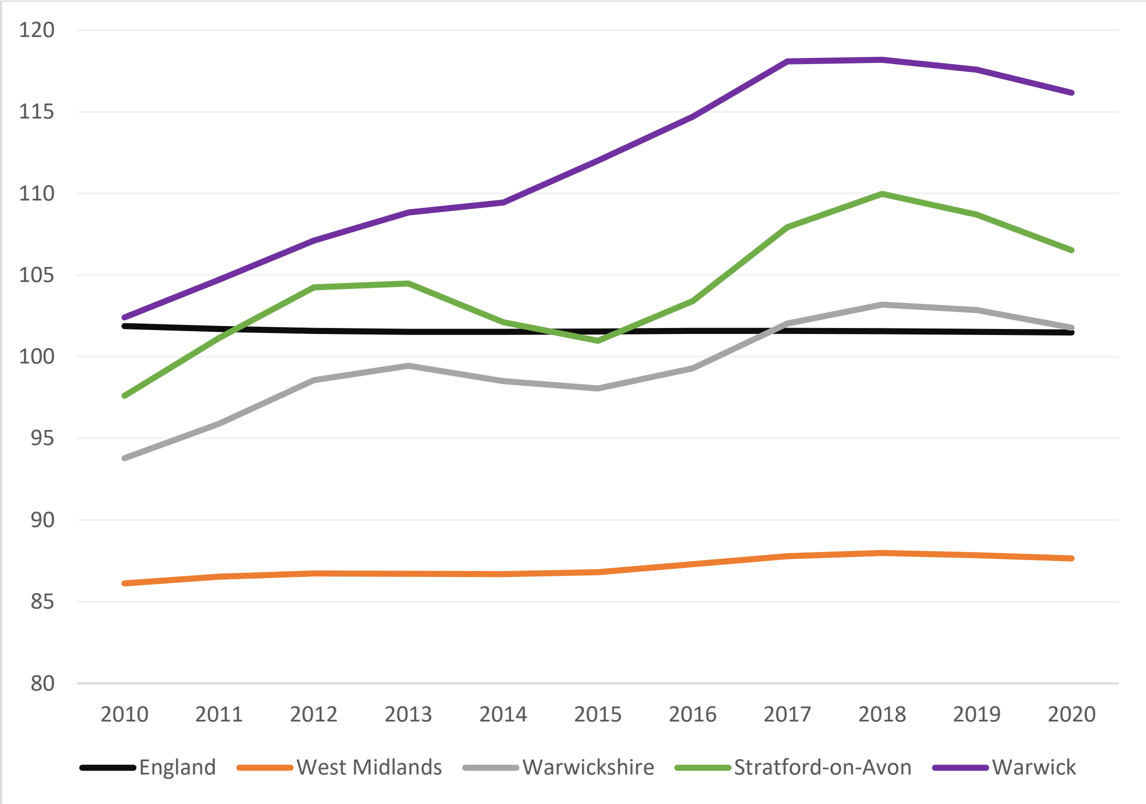
Warwick's productivity was just above the UK average in 2010 and saw a significant increase in productivity compared to the UK average between 2010 and 2017. Like Stratford, this tailed off between 2018-19, and was drawn back to 2010 levels in 2020 (see Figure 1).

Table 2: GVA per hour indices

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
United Kingdom	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
England	101.9	101.7	101.6	101.5	101.5	101.6	101.6	101.6	101.6	101.5	101.5
West Midlands	86.5	86.7	86.7	86.7	86.8	87.3	87.8	88.0	87.8	87.6	86.5
Warwickshire	95.9	98.6	99.4	98.5	98.1	99.3	102.0	103.2	102.9	101.8	95.9
Stratford-on-Avon	**101.2**	**104.2**	**104.5**	**102.1**	**101.0**	**103.4**	**107.9**	**110.0**	**108.7**	**106.5**	**101.2**
Warwick DC	**104.7**	**107.1**	**108.8**	**109.4**	**112.0**	**114.7**	**118.1**	**118.2**	**117.6**	**116.2**	**104.7**
Coventry	97.8	98.2	98.0	99.9	102.8	105.5	105.2	102.9	100.5	99.3	97.8
Solihull	121.3	120.3	120.1	122.2	126.9	130.5	131.1	127.6	124.6	122.7	121.3
Wychavon	76.5	76.8	77.9	77.6	77.6	78.0	79.7	82.3	84.1	85.1	76.5
North Warwickshire	97.5	103.3	105.3	100.9	95.3	92.6	95.0	98.2	100.0	100.3	97.5
Nuneaton and Bedworth	68.4	71.9	73.9	74.3	72.6	71.8	72.5	74.1	75.9	76.6	68.4
Rugby	97.4	96.4	94.9	94.8	95.7	98.2	99.4	98.7	96.0	93.9	97.4

Source: ONS Subregional productivity: labour productivity indices by UK ITL2 & ITL3 subregions/local authority district, released 6th July 2022

Figure 1: GVA per hour indices comparative performance 2010-2020



Source: ONS

Actual GVA per hour: £

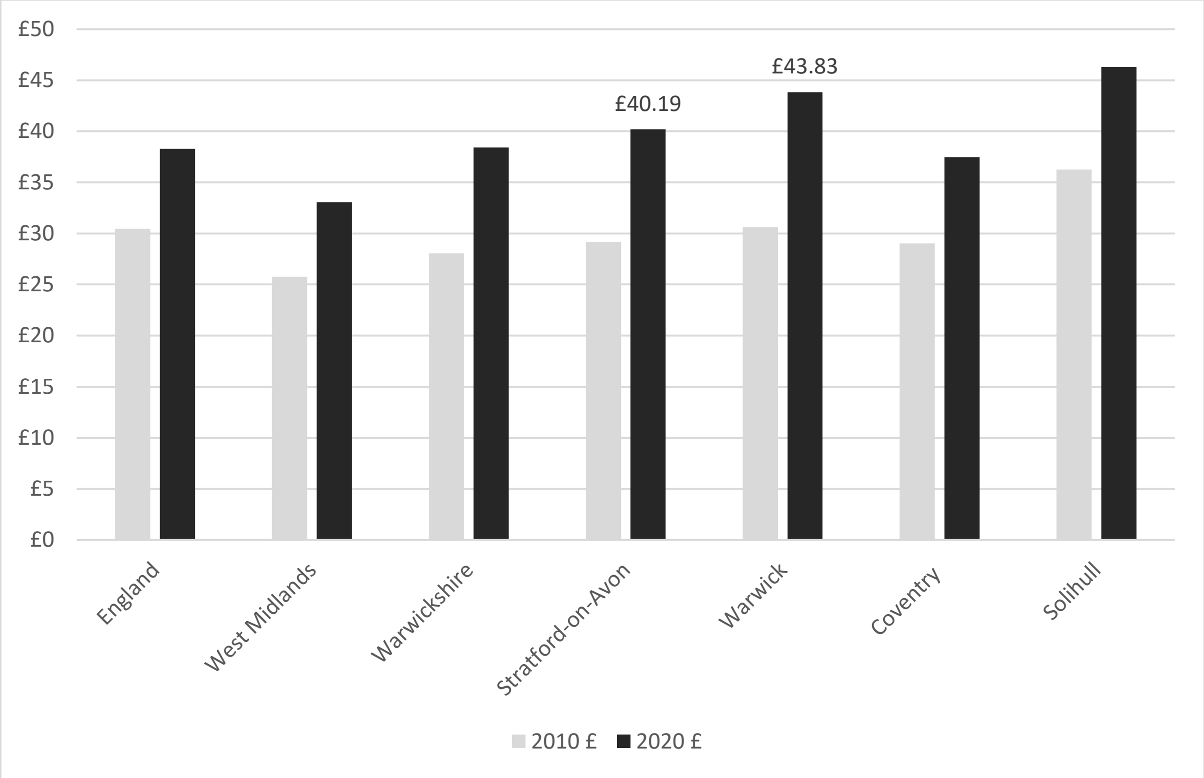
Stratford-on-Avon and Warwick District's actual £GVA per hour are both above the UK, England and Warwickshire averages (see Figure 2).

In 2020, the actual £GVA per hour for Stratford-on-Avon was £40.20 with Warwick at £43.80. The UK average was £37.70, while Warwickshire's average was £38.40 (see Figure 1b.

Rushmoor had the largest actual £GVA per hour, at £74.00, followed by The City of London at £70.10.

Powys had the lowest actual £GVA per hour at £23.10, with Wyre Forest second lowest at £23.90.

Figure 2: GVA per hour comparative performance 2010 & 2020



GVA per head of population

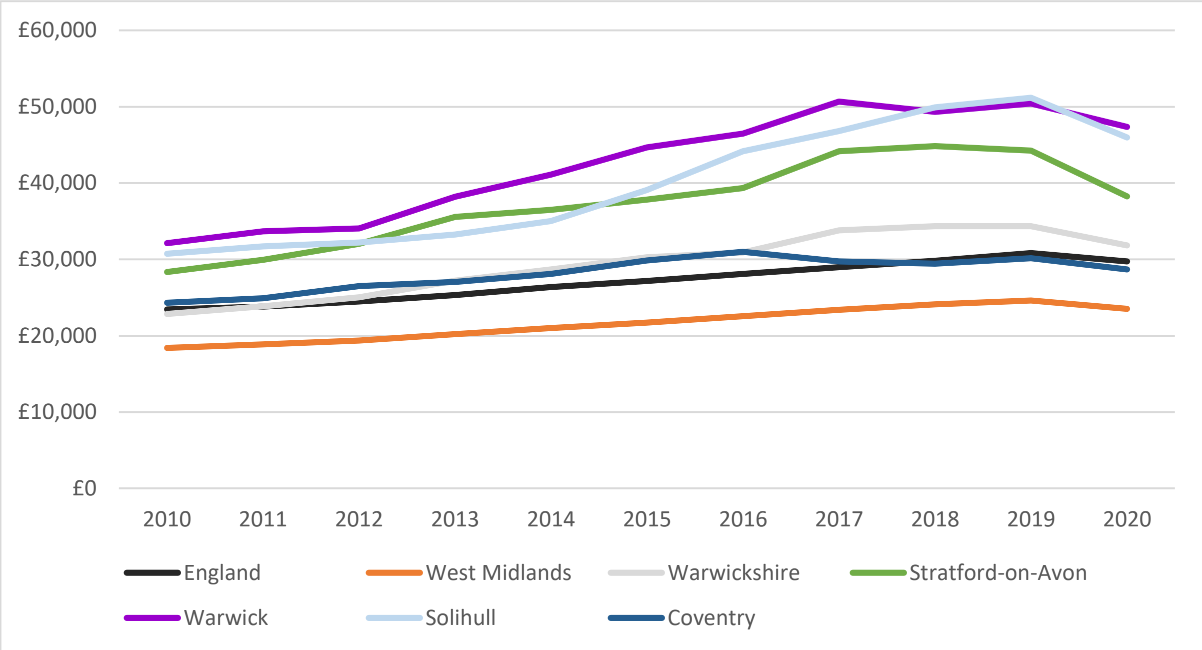
While GVA per hour is a better measure for comparison than GVA per head of population, GVA per head is often used, and so it is sometimes useful to have as a supporting measure.

The actual 2020 £GVA per head of population for Stratford-on-Avon District was £38,240, while for Warwick it was £47,345. These figures are both in excess of the Warwickshire and English averages in 2020 which were £31,823 and £29,757 respectively.

For comparison, the £GVA per head in 2020 for Solihull was £45,977, while for Coventry was £28,699. (see Figure 3).

The highest £GVA per head in 2020 was in Westminster, at £274,318. The lowest £GVA per head was in Castle Point (Essex) with £13,967.

Figure 3: Actual £GVA per head of population 2010-2020



Productivity by industry sector

Stratford-on-Avon

Stratford-on-Avon's economic output is heavily dependent on manufacturing and real estate, with these two sectors making up over 50% of GVA (see Table 3). While manufacturing accounts for just under 20% of all employment in the district, real estate accounts for very little at 1.80%. Tourism was heavily impacted in 2020 by the Covid-19 pandemic: combining the GVA of all 'tourism-related' sectors for 2020 gives a value of £543m; which is significantly lower than that seen in 2018 (£707m).

Stratford-on-Avon has a preponderance of jobs in less productive sectors: the two largest sectors for employment after manufacturing – wholesale and retail trade (14.43% jobs) and health and social work (10.10% jobs) account for only 9.28% and 2.98% GVA respectively; accommodation and food service accounts for the smallest GVA per job at £17,333; health and social work is next at £18,428.

Real estate accounts for the largest GVA per job at £535,200; manufacturing is second at £124,916 per job.

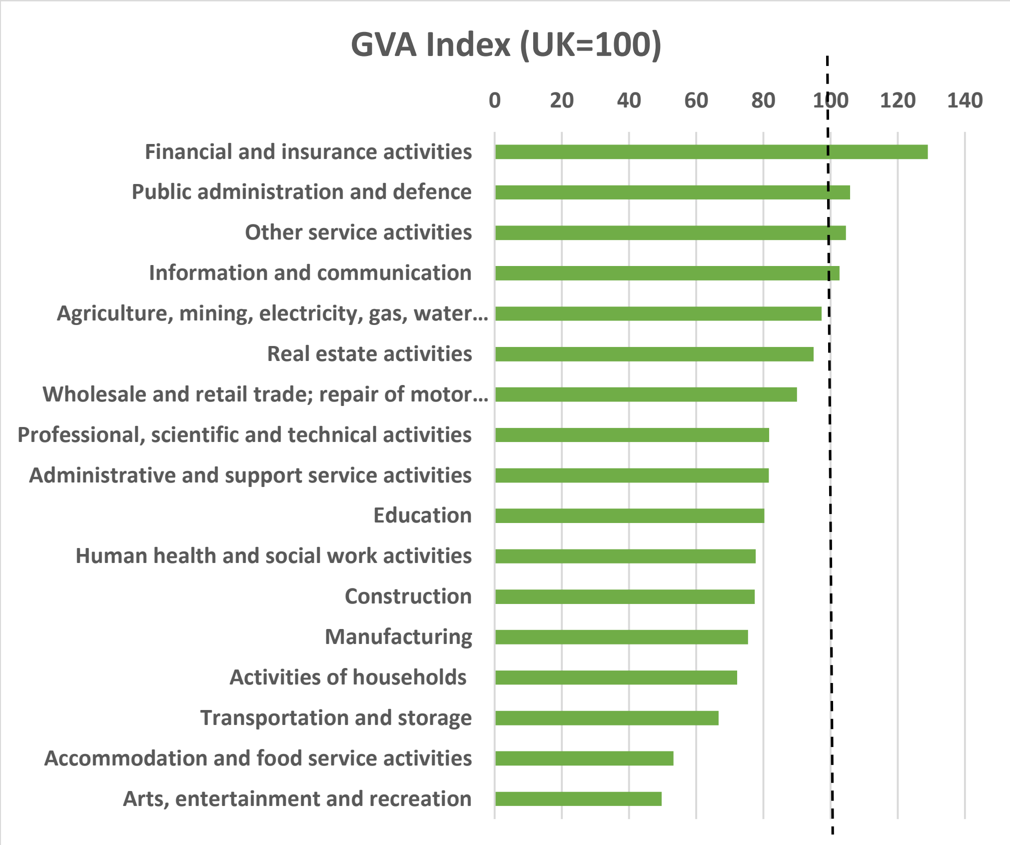
Table 3: Stratford-on-Avon GVA and employment by sector 2020

	GVA 2020			***Employment 2020***		***GVA per job***
	GVA £m	***%***	***Index (UK = 100)***	***Count***	***%***	
ABDE: Agriculture, mining, electricity, gas, water and waste	121	*2.79%*	97.3	2,260	*3.26%*	**£53,539.82**
C: Manufacturing	1,499	*34.59%*	75.4	12,000	*17.32%*	**£124,916.67**
F: Construction	241	*5.56%*	77.4	3,000	*4.33%*	**£80,333.33**
G: Wholesale and retail trade	402	*9.28%*	90.0	10,000	*14.43%*	**£40,200.00**
H: Transportation and Storage	40	*0.92%*	66.7	1,250	*1.80%*	**£32,000.00**
I: Accommodation and Food service	104	*2.40%*	53.2	6,000	*8.66%*	**£17,333.33**
J: Information and communication	154	*3.55%*	102.7	2,500	*3.61%*	**£61,600.00**
K: Financial and insurance	263	*6.07%*	129.0	3,000	*4.33%*	**£87,666.67**
L: Real estate	669	*15.44%*	95.0	1,250	*1.80%*	**£535,200.00**
M: Professional, scientific and technical	177	*4.08%*	81.7	6,000	*8.66%*	**£29,500.00**
N: Administrative and support services	162	*3.74%*	81.6	4,000	*5.77%*	**£40,500.00**
O: Public administration and defence	63	*1.45%*	105.8	1,000	*1.44%*	**£63,000.00**
P: Education	149	*3.44%*	80.3	4,500	*6.50%*	**£33,111.11**
Q: Health and social work	129	*2.98%*	77.7	7,000	*10.10%*	**£18,428.57**
R: Arts, entertainment and other recreation	37	*0.85%*	49.7	1,750	*2.53%*	**£21,142.86**
S: Other services	121	*2.79%*	104.6	1,750	*2.53%*	**£69,142.86**

Source: ONS GVA by Industry: Local authorities by ITL1 Regions – West Midlands, December 2020 + Nomis Labour Market Profile: Stratford-on-Avon

Again these GVA figures can be indexed against the UK average to understand whether an area follows the UK trend in GVA per sector or not. Stratford-on-Avon produces more GVA than the UK average in just 4 out of 16 sectors: Financial and Insurance Activities, Public administration and defence, Other Service Activities and Information and Communication (see Figure 4). Stratford sees more jobs than the UK average in Agriculture, forestry and fishing, Manufacturing, Motor trades, Accommodation and food services, Arts, entertainment and recreation, and Property (see Figure 6).

Figure 4: Stratford-on-Avon indexed GVA by sector 2020



Source: ONS GVA by Industry: Local authorities by ITL1 Regions – West Midlands, December 2020

Figure 5: Stratford-on-Avon sector GVA versus number of jobs (2020)

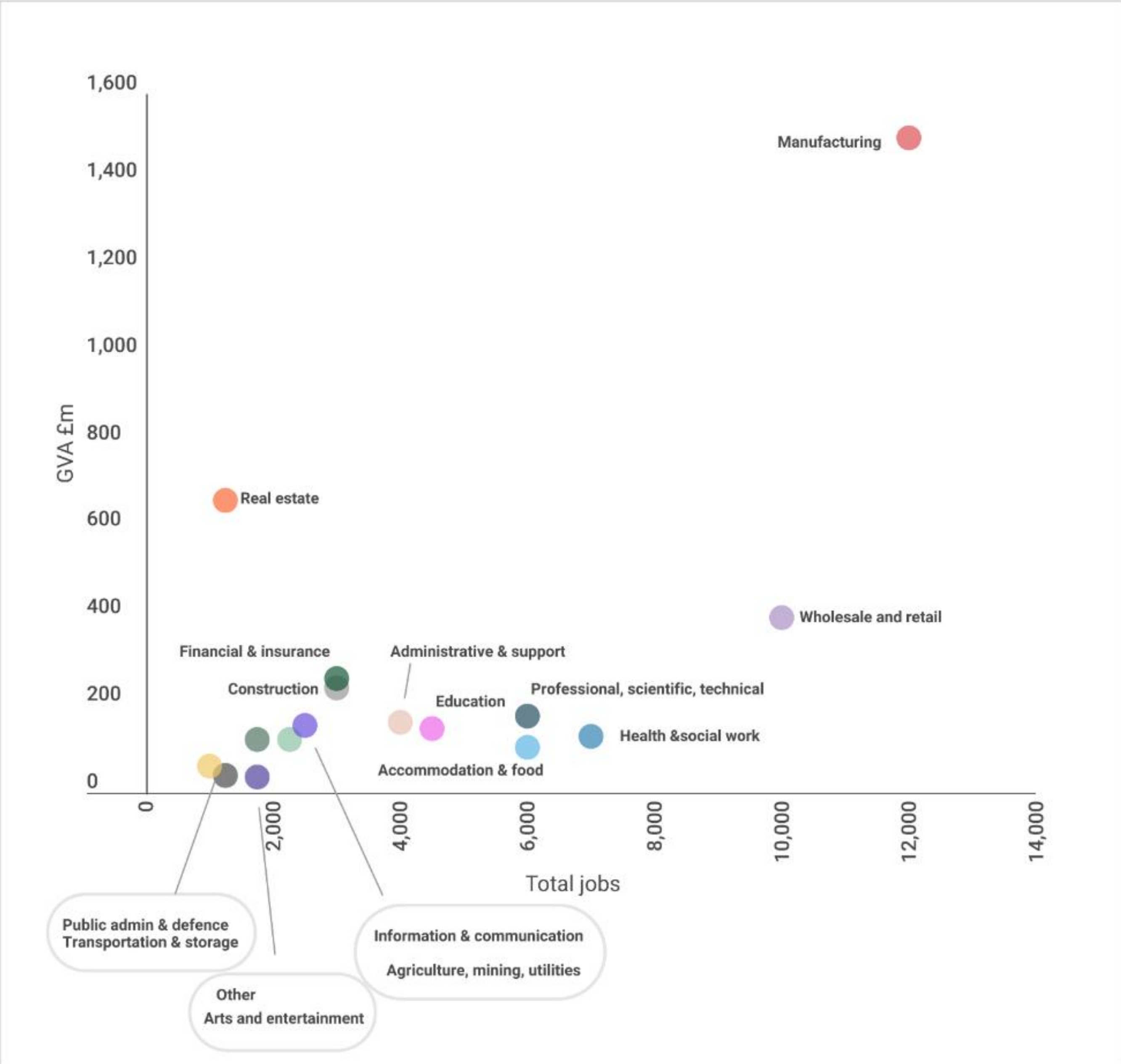
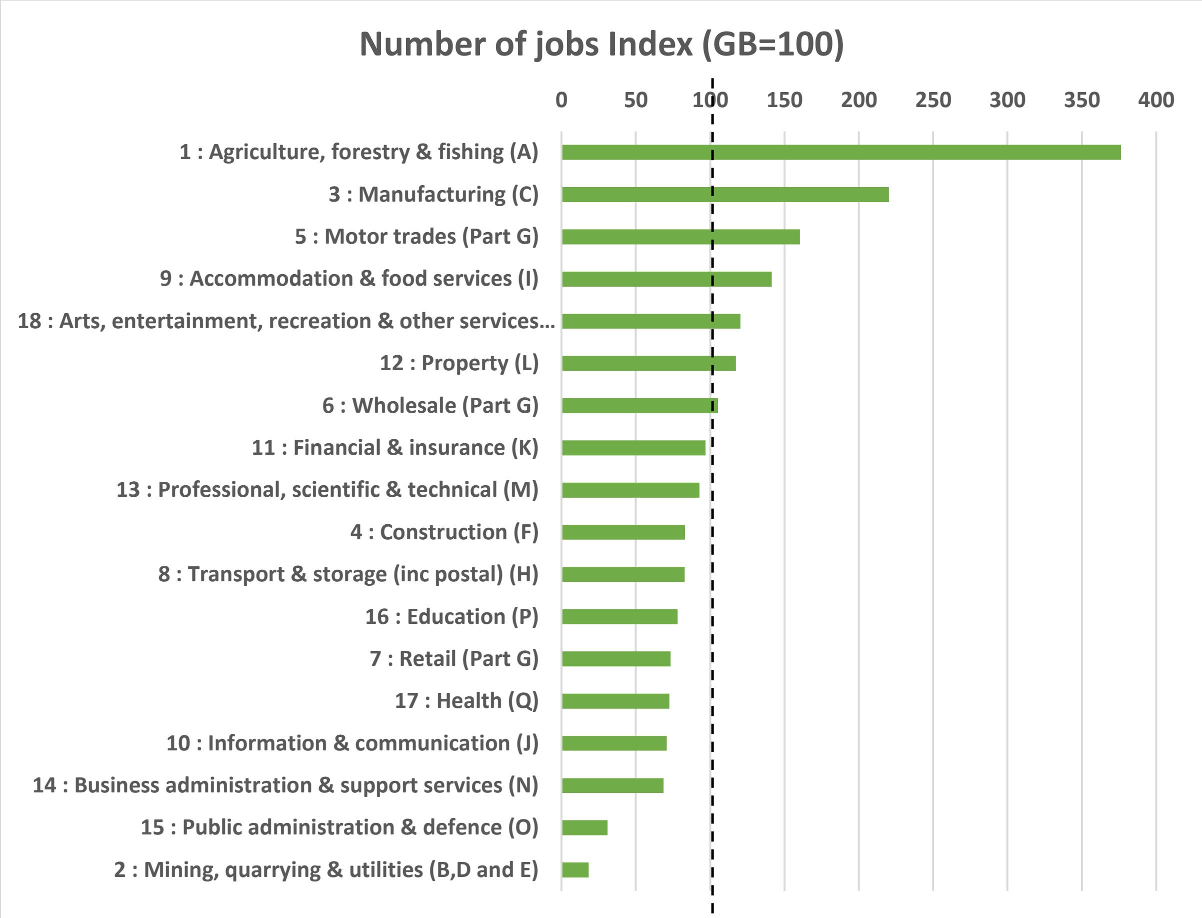


Figure 6: Stratford-on-Avon Employment by sector indexed by GB average 2019



Source: BRES via Nomis, 2019

Warwick

Warwick District's economic output is less dependent on single sectors, unlike Stratford-on-Avon. Its two major sectors – Agriculture, Mining and Utilities (utilities being the major source of GVA) and Wholesale and Retail trade – make up just under 35% of the district's GVA (see Table 4). While agriculture, mining and utilities account for just under 5% of employment in the district, wholesale and retail trade accounts for just under 15%. Combining all 'tourism-related' GVA sees a value of £727m, significantly down on the value for 2018 of £1,094m, which again shows the size of the impact which the pandemic had on South Warwickshire's tourism industry.

Real estate, agriculture, mining and utilities and financial and insurance sectors accounted for the most GVA created per job, while accommodation and food service accounted for the least GVA per job at £13,000 in 2020.

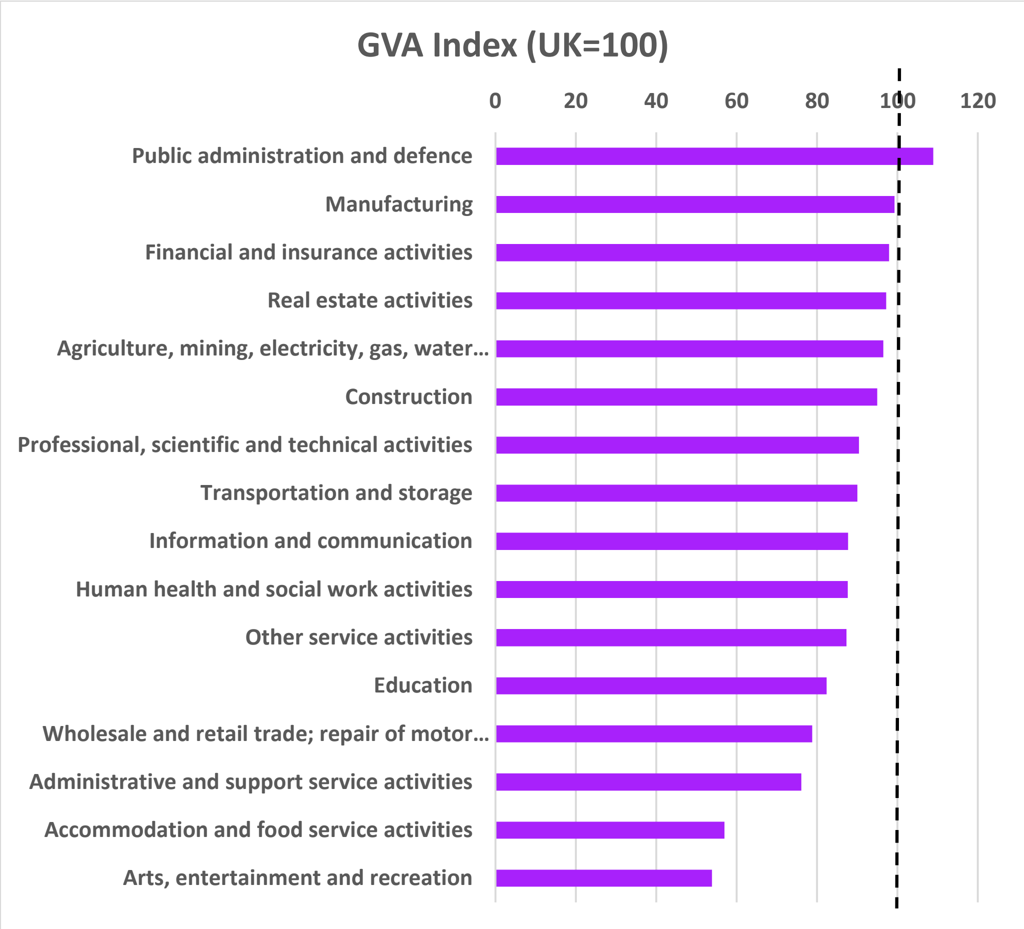
Table 4: Warwick District GVA and employment by sector sectors 2020

	GVA 2020			**Employment 2020**		
	GVA £m	***%***	***Index (UK = 100)***	***Count***	***%***	***GVA per job***
ABDE: Agriculture, mining, electricity, gas, water and waste	1,382	*23.55%*	96.5	4,350	*4.86%*	**£317,701.15**
C: Manufacturing	453	*7.72%*	99.3	6,000	*6.70%*	**£75,500.00**
F: Construction	219	*3.73%*	95.0	2,500	*2.79%*	**£87,600.00**
G: Wholesale and retail trade	613	*10.44%*	78.8	13,000	*14.52%*	**£47,153.85**
H: Transportation and Storage	119	*2.03%*	90.0	3,500	*3.91%*	**£34,000.00**
I: Accommodation and Food service	78	*1.33%*	57.0	6,000	*6.70%*	**£13,000.00**
J: Information and communication	429	*7.31%*	87.7	6,000	*6.70%*	**£71,500.00**
K: Financial and insurance	265	*4.52%*	97.9	1,250	*1.40%*	**£212,000.00**
L: Real estate	625	*10.65%*	97.2	900	*1.01%*	**£694,444.44**
M: Professional, scientific and technical	399	*6.80%*	90.4	10,000	*11.17%*	**£39,900.00**
N: Administrative and support services	343	*5.84%*	76.1	8,000	*8.94%*	**£42,875.00**
O: Public administration and defence	272	*4.63%*	108.9	5,000	*5.59%*	**£54,400.00**
P: Education	168	*2.86%*	82.4	5,000	*5.59%*	**£33,600.00**
Q: Health and social work	280	*4.77%*	87.6	10,000	*11.17%*	**£28,000.00**
R: Arts, entertainment and other recreation	36	*0.61%*	53.9	1,500	*1.68%*	**£24,000.00**
S: Other services	187	*3.19%*	87.3	4,500	*5.03%*	**£41,555.56**

Source: ONS GVA by Industry: Local authorities by ITL1 Regions – West Midlands, December 2020 + Nomis Labour Market Profile: Warwick

In 2020, Warwick only produced more GVA than the UK average in 1 out of 16 sectors: Public Administration and Defence (see Figure 7). However, it employed far more than the UK average in Mining, quarrying and utilities, Wholesale, Art, recreation and leisure, Motor trades, Information and communication, Professional, technical and scientific, and Administration and business support services (see Figure 9).

Figure 7: Warwick District indexed GVA by sector 2020



Source: ONS GVA by Industry: Local authorities by NUTS1 Regions – West Midlands, December 2020

Figure 8: Warwick District Output versus employment 2020

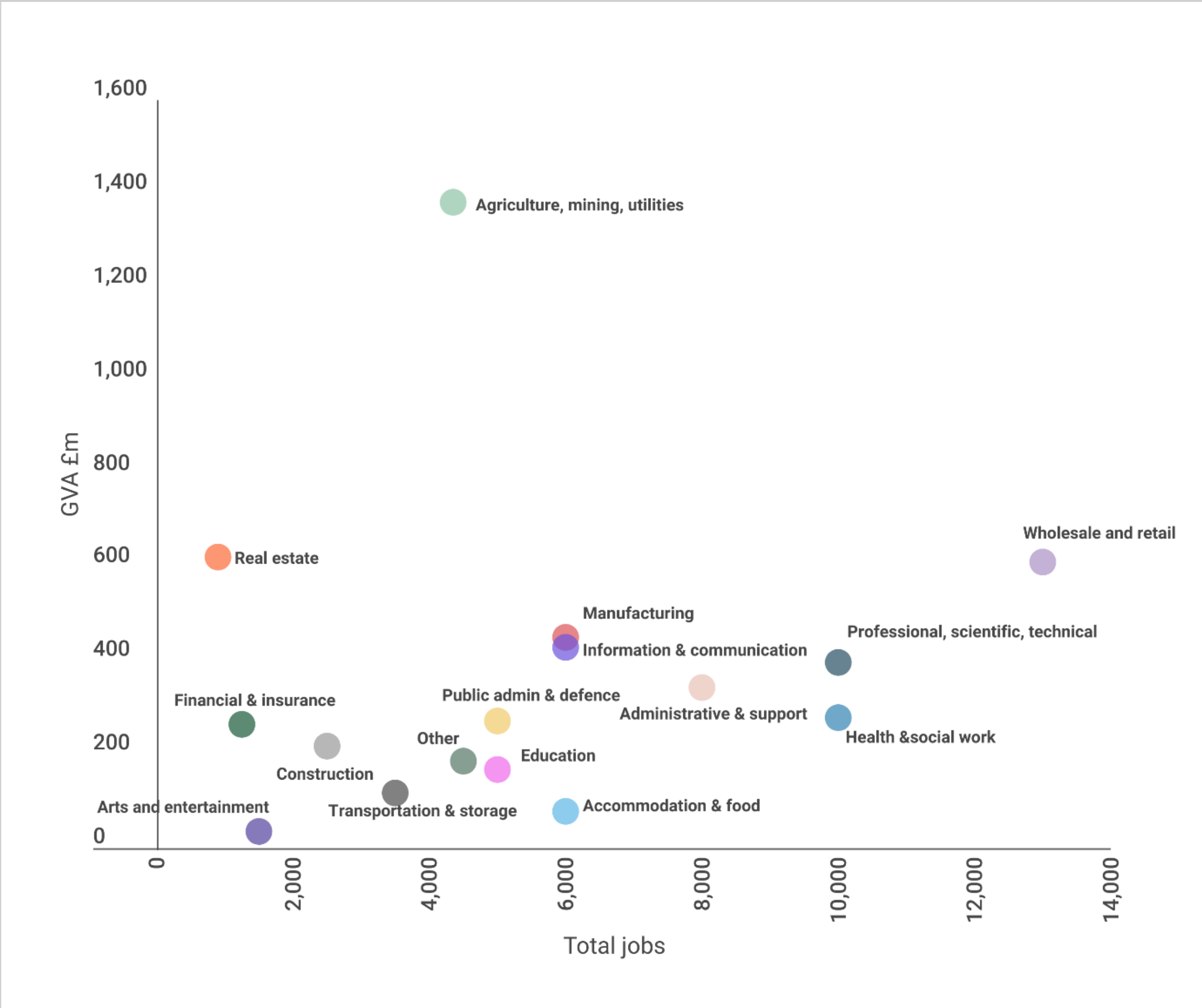
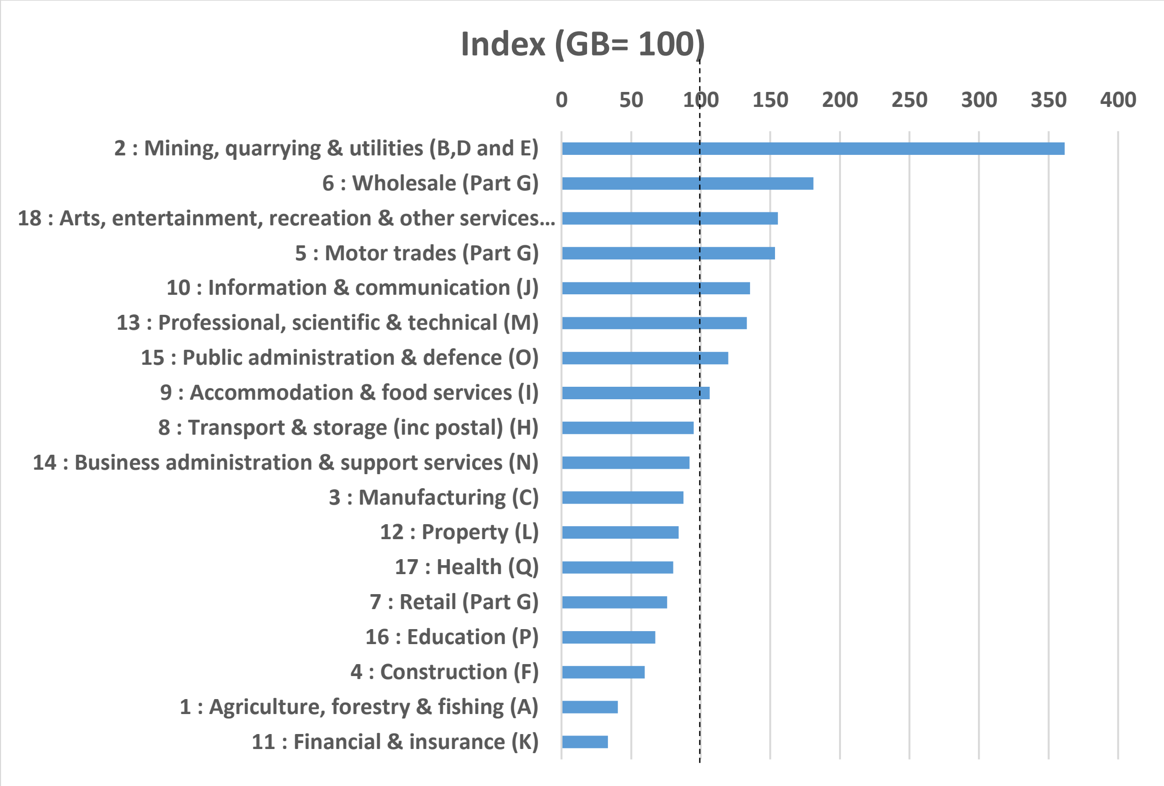


Figure 9: Warwick Employment by sector indexed by GB average 2019



Source: BRES via Nomis, 2019

Economic Structure

Professional, scientific and technical businesses account for the largest proportion of businesses across Stratford-on-Avon and Warwick Districts, with 20.6% businesses in this sector in Stratford-on-Avon and 25.4% businesses in Warwick.

In Stratford-on-Avon, Wholesale, retail and motor vehicle/motorbike repair businesses account for the second highest proportion of businesses with 11.1%. In Warwick, Business administration and support account for the second highest proportion of businesses, with 12.30% (see Table 5/Figure 10); this sector accounts for a greater proportion of all businesses on average across England or Warwickshire.

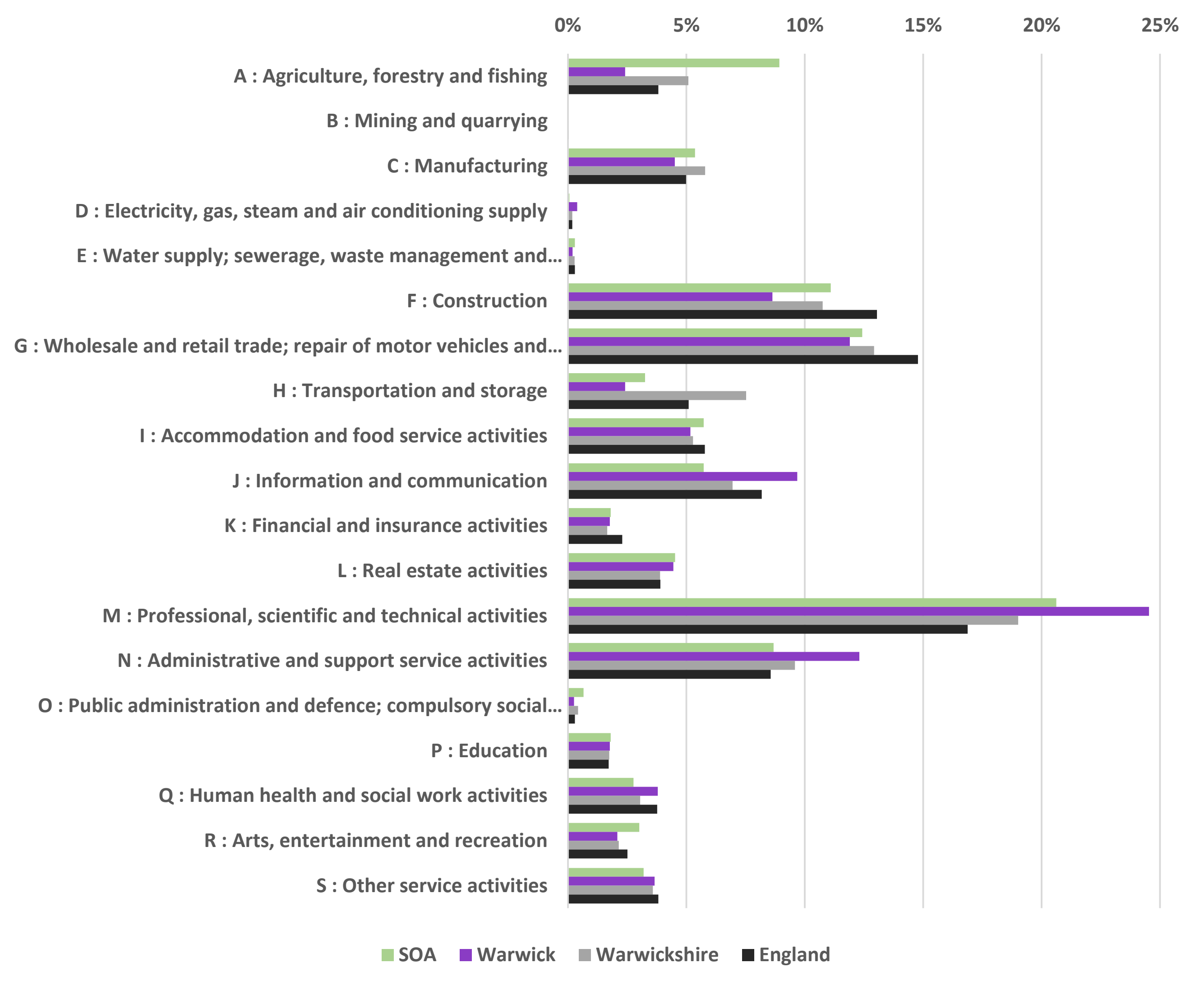
Stratford-on-Avon has above the England and Warwickshire average number of businesses within the Agriculture, Forestry and Fishing sector, with 8.93% businesses in this sector.

Table 5: Businesses by sector 2021

	Stratford -on-Avon	SOA	Warwick	Warwick	Warwick shire	England
	Count	*%*	*Count*	*%*	*%*	*%*
1: Agriculture, forestry & fishing (A)	740	*8.93*	185	*2.42*	*5.09*	*3.82*
2: Mining, quarrying & utilities (B)	0	*0.00*	0	*0.00*	*0.04*	*0.04*
3: Manufacturing (C)	445	*5.37*	345	*4.52*	*5.80*	*4.99*
4: Electricity, gas, steam and air conditioning supply (D)	5	*0.06*	30	*0.39*	*0.18*	*0.18*
5: Water supply; sewerage, waste management and remediation activities (E)	25	*0.30*	15	*0.20*	*0.29*	*0.30*
6: Construction (F)	920	*11.1*	660	*8.64*	*10.76*	*13.05*
7: Wholesale and retail trade; repair of motor vehicles and motorcycles (G)	1,030	*12.4*	910	*11.91*	*12.93*	*14.78*
8: Transport & storage (inc. postal) (H)	270	*3.26*	185	*2.42*	*7.53*	*5.10*
9: Accommodation & food services (I)	475	*5.73*	395	*5.17*	*5.29*	*5.78*
10: Information & communication (J)	475	*5.73*	740	*9.69*	*6.95*	*8.19*
11: Financial & insurance (K)	150	*1.81*	135	*1.77*	*1.66*	*2.29*
12: Property (L)	375	*4.52*	340	*4.45*	*3.90*	*3.91*
13: Professional, scientific & technical (M)	1,710	*20.6*	1,875	*24.5*	*19.01*	*16.89*
14: Business administration & support services (N)	720	*8.69*	940	*12.30*	*9.59*	*8.56*
15: Public administration & defence (O)	55	*0.66*	20	*0.26*	*0.43*	*0.29*
16: Education (P)	150	*1.81*	135	*1.77*	*1.75*	*1.72*
17: Health (Q)	230	*2.77*	290	*3.80*	*3.05*	*3.78*
18: Arts, entertainment and recreation (R)	250	*3.02*	160	*2.09*	*2.15*	*2.51*
19: Other service activities (S)	265	*3.20*	280	*3.66*	*3.59*	*3.82*

Source: ONS IDBR via NOMIS

Figure 10: Proportion of businesses by sector 2020



Trends in sector growth: number of businesses

Over the last five years, Stratford-on-Avon has seen significant growth in the number of businesses in the Construction, Transportation and Storage, Accommodation and Food Service and Administrative and Support Service activities sectors (see Table 6).

Warwick District has seen growth in the number of businesses in the Construction, Accommodation and Food Service and Property sectors (see Table 7).

(Please note, these figures are just for VAT and/or PAYE registered businesses, and are therefore not inclusive of all businesses, particularly not sole traders. Changes over time may in part be due to businesses de-registering from VAT or PAYE schemes.)

Table 6: Change in number of businesses 2017-2022 Stratford-on-Avon District

	2017	2022	Net change
Agriculture, forestry & fishing	780	765	-15
Mining, Utilities & Manufacturing	475	465	-10
Construction	850	1,020	+170
Motor trades	250	265	+15
Wholesale	345	325	-20
Retail	485	480	-5
Transport & Storage (inc. postal)	155	345	+190
Accommodation & food services	430	525	+95
Information & communication	495	470	-25
Finance & insurance	145	145	0
Property	370	405	+35
Professional, scientific & technical	1,775	1,595	-180
Business administration & support services	670	790	+120
Public administration & defence	50	55	+5
Education	160	150	-10
Health	210	230	+20
Arts, entertainment, recreation & other services	510	510	0

Table 7: Change in number of businesses 2017-2022 Warwick District

	2017	2022	Net Change
Agriculture, forestry & fishing	200	185	-15
Mining, Utilities & Manufacturing	415	380	-35
Construction	620	695	+75
Motor trades	160	165	+5
Wholesale	270	250	-20
Retail	475	460	-15
Transport & Storage (inc. postal)	160	205	+45
Accommodation & food services	370	430	+60
Information & communication	740	690	-50
Finance & insurance	130	135	+5
Property	300	340	+40
Professional, scientific & technical	2,320	1,700	-620
Business administration & support services	650	625	-25
Public administration & defence	20	20	0
Education	155	140	-15
Health	315	305	-10
Arts, entertainment, recreation & other services	435	440	+5

Trends in sector growth: number of jobs

Stratford-on-Avon District saw an overall loss of jobs between 2017 and 2021. Significant losses were seen in Wholesale/retail/motor trades, Professional, technical and scientific, Education, Real estate and Agriculture, forestry and fishing. However, there was significant growth in the number of jobs in Information and communication, and in Transportation and storage. Financial and insurance activities also saw some growth, as did the water industry (see Table 8).

Warwick District, conversely, saw a net addition of just over 3,000 jobs in the same period. While the wholesale/retail/motor trades and Professional, technical and scientific sectors saw significant losses, Information and communication saw a boost of 2,000 jobs, while Administration and business support and Human health and social work activities saw 1,000 extra jobs each (see Table 9).

The loss of jobs in both districts can be explained by the impacts of the Covid-19 pandemic and issues relating to Brexit.

Table 8: Change in number of jobs by sector 2017-2021 Stratford-on-Avon

Industry	2017	2021	Net change
A: Agriculture, forestry and fishing	*2,000*	*1,500*	-500
B: Mining and quarrying	*10*	*0*	-10
C: Manufacturing	*12,000*	*12,000*	0
D: Electricity, gas, steam and air conditioning supply	*15*	*10*	-5
E: Water supply; sewerage, waste management etc	*200*	*300*	+100
F: Construction	*3,000*	*3,000*	0
G: Wholesale and retail trade; motor trades	*11,000*	*10,000*	-1,000
H: Transportation and storage	*1,250*	*2,000*	+750
I: Accommodation and food service activities	*7,000*	*7,000*	0
J: Information and communication	*2,000*	*4,000*	+2,000
K: Financial and insurance activities	*2,250*	*2,500*	+250
L: Real estate activities	*1,750*	*1,250*	-500
M: Professional, scientific and technical activities	*7,000*	*6,000*	-1,000
N: Administrative and support service activities	*4,000*	*4,000*	0
O: Public administration and defence	*900*	*900*	0
P: Education	*5,000*	*4,500*	-500
Q: Human health and social work activities	*7,000*	*7,000*	0
R: Arts, entertainment and recreation	*2,500*	*2,500*	0
S: Other service activities	*1,500*	*1,500*	0
TOTAL	**70,375**	**69,960**	**-415**

Source: BRES via NOMIS

Table 9: Change in number of jobs by sector 2017-2021 Warwick

Industry	2017	2021	Net change
A: Agriculture, forestry and fishing	*250*	*300*	+50
B: Mining and quarrying	*10*	*0*	-10
C: Manufacturing	*6,000*	*6,000*	0
D: Electricity, gas, steam and air conditioning supply	*3,500*	*3,500*	0
E: Water supply; sewerage, waste management etc	*700*	*500*	-200
F: Construction	*2,500*	*2,500*	0
G: Wholesale and retail trade; motor trades	*14,000*	*13,000*	-1,000
H: Transportation and storage	*3,500*	*4,000*	+500
I: Accommodation and food service activities	*7,000*	*7,000*	0
J: Information and communication	*5,000*	*7,000*	+2,000
K: Financial and insurance activities	*1,000*	*1,000*	0
L: Real estate activities	*1,250*	*1,000*	-250
M: Professional, scientific and technical activities	*10,000*	*9,000*	-1,000
N: Administrative and support service activities	*6,000*	*7,000*	+1,000
O: Public administration and defence	*4,500*	*4,500*	0
P: Education	*5,000*	*5,000*	0
Q: Human health and social work activities	*10,000*	*11,000*	+1,000
R: Arts, entertainment and recreation	*2,000*	*2,500*	+500
S: Other service activities	*3,000*	*3,500*	+500
TOTAL	**85,210**	**88,300**	**+3,090**

Business and Enterprise

Business size

The spread of differently-sized businesses across both Stratford-on-Avon and Warwick Districts follows both the English and Warwickshire averages: 90% are micro-businesses, 8% small, 1.5% medium and <1% large (see Table 7).

Table 10: Business sizes 2021

	Total	Micro		Small		Medium		Large	
		Count	%	Count	%	Count	%	Count	%
England	**2,405,965**	**2,161,045**	*89.82*	**199,325**	*8.28*	**36,290**	*1.51*	**9,305**	*0.39*
Warwickshire	**28,235**	**24,900**	*89.91*	**2,260**	*8.16*	**410**	*1.48*	**125**	*0.45*
Stratford-on-Avon	**8,290**	**7,475**	*90.2*	**690**	*8.3*	**110**	*1.3*	**20**	*0.2*
Warwick	**7,640**	**6,830**	*89.4*	**640**	*8.4*	**125**	*1.6*	**45**	*0.6*

Source: ONS IDBR 2021

Turnover

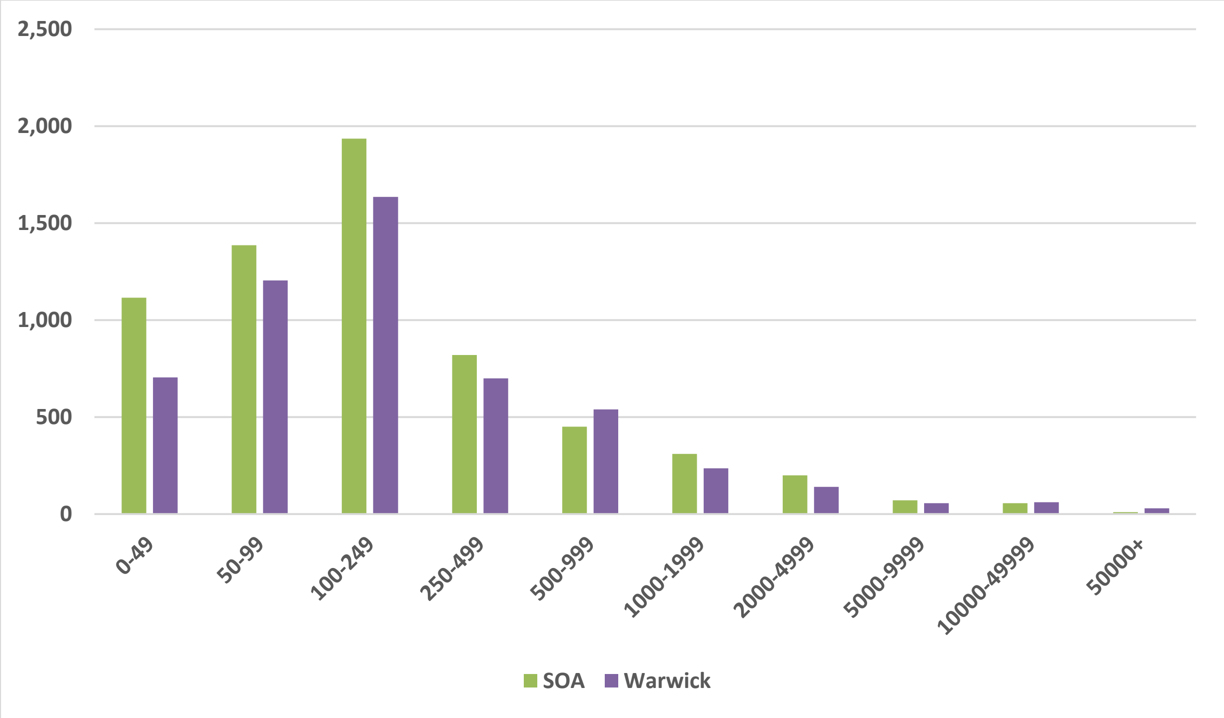
Stratford-on-Avon has a greater number of VAT/PAYE-registered businesses overall than Warwick. Of these, Warwick has a greater number of high-turnover businesses than Stratford-on-Avon (turnover of over £10m), with 90 compared to 65 (see Table 8/Figure 11).

Table 11: Number of VAT and PAYE registered businesses with turnover in £000s

Turnover £m	0-49	50-99	100-249	250-499	500-999	1,000-1,999	2,000-4,999	5,000-9,999	10,000-49,999	50,000+	Total
Stratford-on-Avon	1,115	1,385	1,935	820	450	310	200	70	55	10	**6,350**
Warwick	705	1,205	1,635	700	540	235	140	55	60	30	**5,305**

Source: ONS IDBR 2021

Figure 11: Number of VAT and PAYE registered businesses by turnover (£000s)



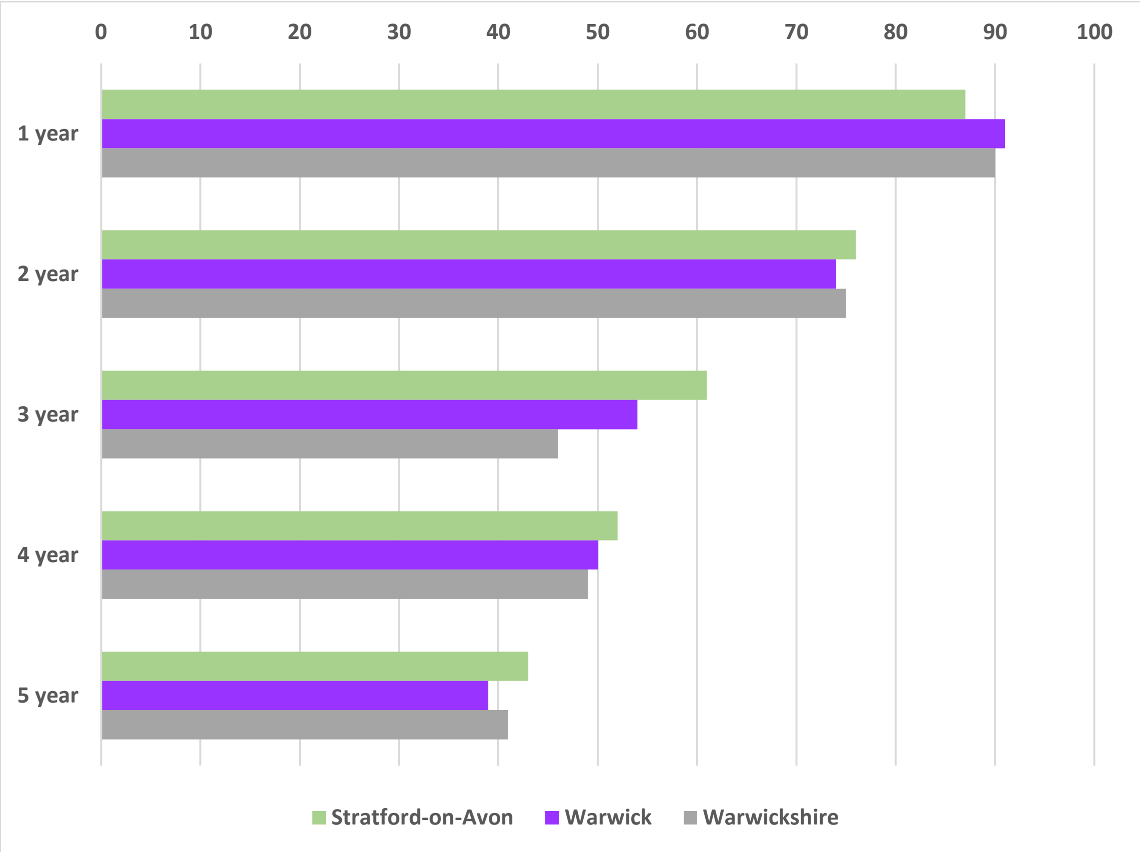
Source: ONS IDBR 2021

Business Survival

Stratford-on-Avon District has a worse one-year survival rate than the average across Warwickshire and Warwick but has a better than average survival rate for those businesses that reach two years or over (see Figure 12).

Warwick District businesses tend to have a better than average survival rate within their first year.

Figure 12: % Business survival rates 2021



Source: ONS IDBR via data.warwickshire.gov.uk/economy-and-employment

Tourism

Tourism was the most impacted industry during the Covid-19 pandemic and accompanying lockdowns of 2020. In 2021, although a return to business-as-usual did not occur, the industry did show some signs of a revival.

The Shakespeare's England area (covering South Warwickshire) saw 7.847m trips made in 2021. This is down 26% on 2019, when 10.6m trips were made. However, compared to 2020, which reflected an almost 50% reduction on 2019 at 5.599m trips, this was a significant increase.

92% of trips made to the Shakespeare's England area were day trips, while 8% were overnight stays. This split is seen generally across the area with this exception of Stratford-upon-Avon itself, which saw a slightly higher proportion of staying trips compared to day trips (88% day trips vs 12% staying).

Table 12: Tourism Economic Impact statistics 2021

	Shakespeare's England Area	Stratford-on-Avon District	Warwick District	Stratford-upon-Avon
Total number trips	***7,847,000***	***5,215,000***	***3,015,000***	***1,608,000***
Day trips	7,256,000	4,867,000	2,773,000	1,419,000
Overnight trips	591,000	348,000	242,000	189,000
.... Number nights	1,369,000	789,000	580,000	425,000
Total spent	***£415,785,010***	***£257,817,470***	***£167,450,100***	***£132,773,000***
Day trip spend	£275,595,000	£180,737,000	£105,567,000	£65,226,000
Overnight spend	£122,502,000	£72,572,000	£49,930,000	£42,806,000
Total jobs (fte) (+multiplier)	***7,442***	***4,826***	***2,887***	***2,396***
Tourism jobs (fte)	5,581	3,670	2,141	1,818
Indirect jobs (fte)	1,862	1,156	746	579

Employment

Employment rate

Both Stratford-on-Avon and Warwick Districts have employment rates above the average for the West Midlands and Great Britain as a whole, and much lower rates of economic inactivity in the 16-64 years age bracket than the West Midlands or GB average (see Table 10).

Table 13: Economic activity rates March 2022

	Stratford-on-Avon		**Warwick**		**West Midlands**	**GB**
	Count	***%***	***Count***	***%***	***%***	***%***
Economically Active	62,900	82.4	74,600	83.1	77.5	78.5
In Employment	61,400	80.3	72,000	80.1	73.7	75.2
Employees	51,000	68.8	64,100	72.4	65.4	65.6
Self employed	10,400	11.4	7,700	7.7	8.2	9.3
Unemployed	1,900	3.0	2,500	3.2	4.7	4.1
Economically Inactive	12,400	17.6	14,800	16.9	22.5	21.5

Source: Nomis Employment and unemployment April 2021-March 2022

Out of work benefits

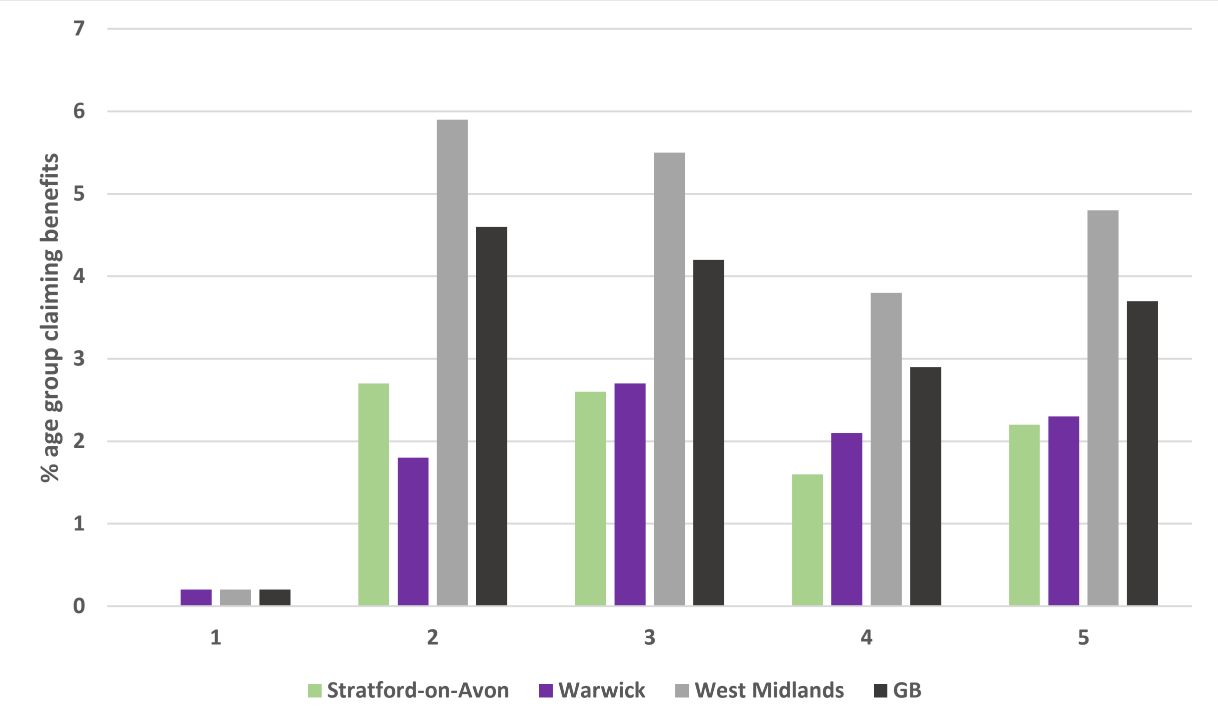
Stratford-on-Avon and Warwick Districts have among the lowest benefit claims of all West Midlands authorities (see Table 14/Figure 13).

Table 14: Out of work benefit claims September 2022

	Stratford-on-Avon		**Warwick**		**West Midlands**	**GB**
	Count	***%***	***Count***	***%***	***%***	***%***
16-17	0	0.0	5	0.2	0.2	0.2
18-24	220	2.7	305	1.8	5.9	4.6
25-49	965	2.6	1,245	2.7	5.5	4.2
50+	475	1.6	555	2.1	3.8	2.9
Total	**1,665**	**2.2**	**2,110**	**2.3**	**4.8**	**3.7**

Source: Nomis Claimant count by age, September 2022

Figure 13: Claimant count September 2022



Earnings

While both Stratford-on-Avon and Warwick District have average gross weekly pay and hourly pay that are above the West Midlands and GB average, there is some disparity between males and females. Full-time females earn on average 33% less in weekly pay than their male counterparts in Stratford-on-Avon District, while females in Warwick District earn 28% less, compared to a GB average of female weekly pay being 15% less (see Table 15).

Table 15: Earnings per full-time worker 2021

	Stratford-on-Avon £	Warwick £	West Midlands £	GB £
Gross Weekly Pay				
Full-Time Workers	676.1	729.1	581.8	613.1
Male full-time	794.1	796.7	627.0	655.5
Female full-time	533.4	575.1	524.9	558.1
Hourly Pay				
Full-time workers	17.52	18.70	14.62	15.65
Male full-time	20.48	20.49	15.30	16.26
Female full-time	14.28	15.99	13.82	14.86

Source: Nomis Earnings by place of residence 2021

Education and skills

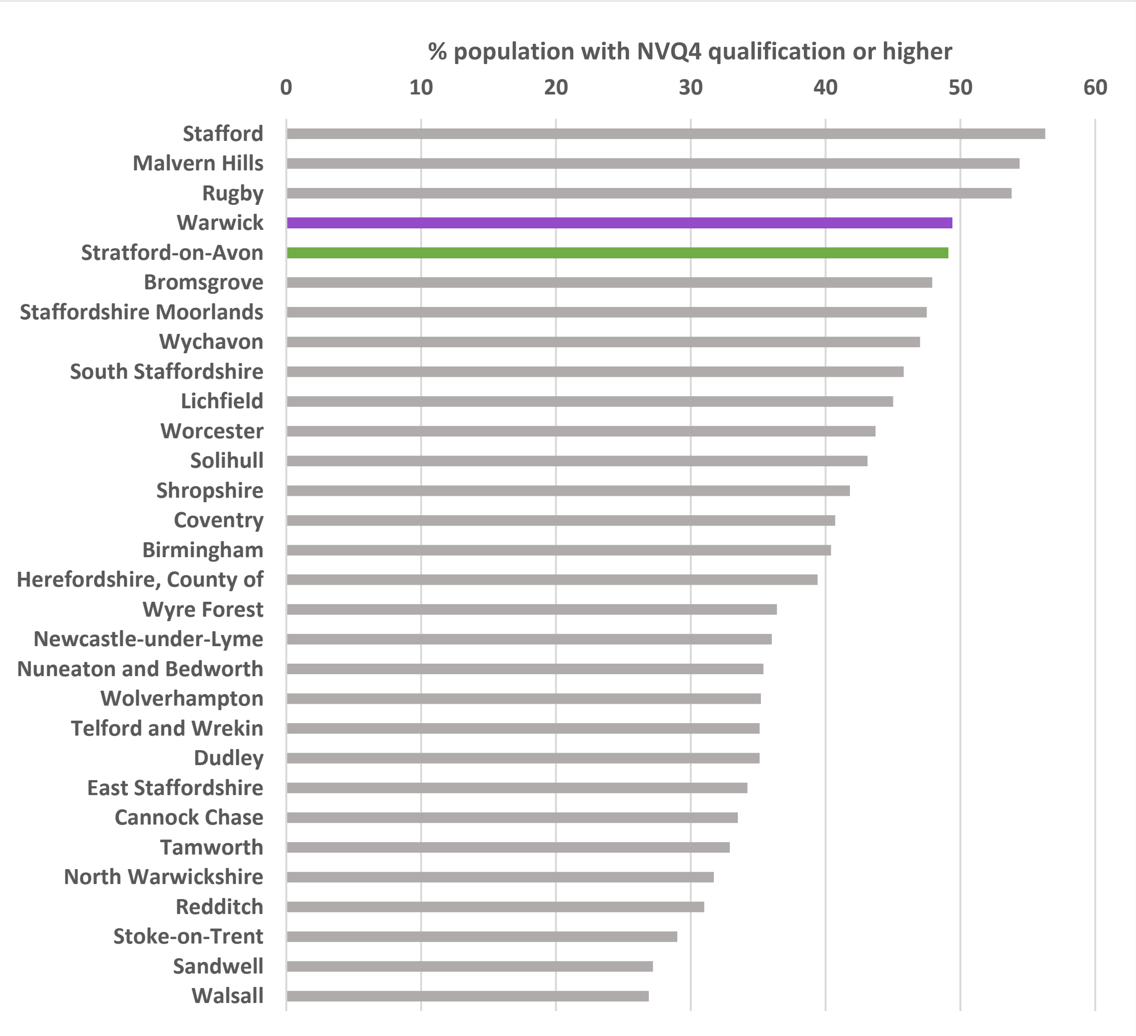
Warwick and Stratford-on-Avon are the top five most qualified authorities in the West Midlands (see Figure 14), with only Stafford, Malvern Hills and Rugby having more qualified populations. Warwick and Stratford are also above the GB average (see Table 16).

Table 16: Qualifications September 2022

	Stratford-on-Avon		Warwick		West Midlands	GB
	Count	*%*	*Count*	*%*	*%*	*%*
NVQ4 and above	34,800	49.1	43,000	49.4	38.9	43.6
NVQ3 and above	50,500	71.3	57,100	65.6	57.2	61.5
NVQ2 and above	62,600	88.3	72,600	83.3	75.1	78.1
NVQ1 and above	62,500	92.9	79,900	91.7	84.8	87.5
No qualifications	3,000	4.2	3,200	3.6	7.8	6.6

Source: Nomis Qualifications September 2022

Figure 14: % Populations with NVQ4+ West Midlands Authorities



Apprenticeships

A total of 1,430 apprenticeship were completed/achieved across Warwickshire in 2019-20. Of these, 270 (19%) were completed in Stratford-on-Avon and 250 (17%) in Warwick.

The sectors in which each apprenticeship was taken can be seen in Table 17.

Table 17: Apprenticeships by sector

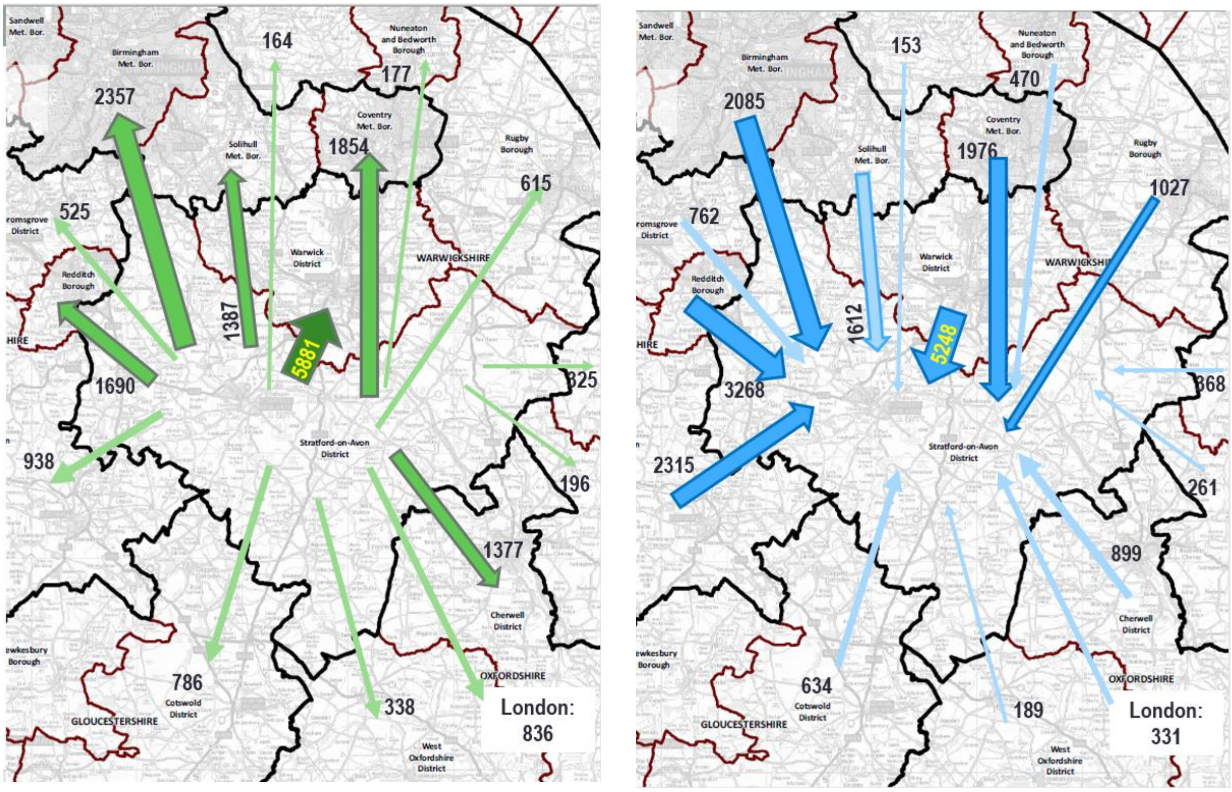
	Stratford-on-Avon		**Warwick**		**Warks**	**England**
	Count	***%***	***Count***	***%***	***%***	***%***
Agriculture, horticulture and animal care	10	4	0	0	0.7	1.8
Arts, media and publishing	10	4	0	0	n/a	0.3
Business, administration and law	60	24	80	30.8	30	28.6
Construction, planning and built environment	10	4	10	3.8	4.3	6.4
Education and training	10	4	10	3.8	5.7	2.5
Engineering and manufacturing tech	40	16	40	15.4	19.3	17.6
Health, public services and care	70	28	60	23.1	22.1	23.4
Information and communication tech	20	8	20	7.7	6.4	6.3
Leisure, tourism and travel	10	4	0	0	2.9	22
Retail and commercial enterprise	30	12	30	11.5	10.7	10.8
Science and maths	n/a	n/a	n/a	n/a	n/a	<1
TOTAL	**270**		**250**			

Travel to work

Data from Census 2011 showed that 50.7% Stratford-on-Avon District residents classed as employed worked *within* the district. 13% of employed residents commuted to Warwick District, 5.1% to Birmingham and 4% to Coventry (see Figure 15).

The number of workers commuting out of the District was higher than those commuting into the District, particularly into/out of areas such as Birmingham, Solihull, Warwick and Oxfordshire. Areas with lower average house prices - namely Wychavon, Bromsgrove, Redditch, Nuneaton and Bedworth, Rugby and Coventry - saw more workers commuting *into* Stratford-on-Avon than vice versa.

Figure 15: Out-commuting and in-commuting Stratford-on-Avon District 2011



Demographics

Population

Data from Census 2021 shows that Stratford-on-Avon is home to just under 135,000 people while Warwick District is home to just under 150,000. Warwick has a significantly younger population than Stratford, with a median age of 40 years compared to Stratford's 48 years.

Table 18: District Population and Area 2021

Key Facts		
	Stratford –on-Avon	**Warwick**
Population	134,700	148,500
Gender split female/male	51.5%/48.5%	50.3%/49.7%
Working age Population	80,161	96,494
% population of working age	60%	65%
Median Age	48 years	40 years
Density	138 (people per km^2)	525 (people per km^2)
Area	$979km^2$	$282.9km^2$

Source: ONS Census 2021

While Stratford-on-Avon has an older than average population compared to England and Warwickshire averages, Warwick has a younger population with a particular emphasis on those aged between 20 and 30 years old (See Table 19 and Figure 16).

This difference in demographics between Stratford-on-Avon and Warwick highlights a challenge for Stratford-on-Avon in terms of attracting younger people back into the district, and the impact this comparative lack of younger working-age population has on economic sustainability and productivity: reliance on importing young labour from outside the district is not environmentally sustainable and limits the amount of entrepreneurship within the district.

Table 19: Population breakdown 2021

	Stratford-on-Avon	Stratford-on-Avon	Warwick	Warwick	Warks	England
AGE BANDS	Count	%	Count	%	%	%
0 - 4	6,200	*4.70*	7,436	*5.00*	*5.20*	*5.45*
5 - 9	6,900	*5.15*	8,159	*5.55*	*5.70*	*5.95*
10-14	7,500	*5.65*	8,098	*5.45*	*5.80*	*6.05*
15 - 19	6,400	*4.70*	9,238	*6.20*	*5.35*	*5.70*
20 - 24	5,400	*4.00*	10,740	*7.25*	*5.35*	*6.05*
25 - 29	6,700	*4.95*	9,549	*6.40*	*6.00*	*6.60*
30 - 34	7,500	*5.6*	10,534	*7.10*	*6.70*	*7.00*
35 - 39	7,400	*5.45*	12,009	*6.65*	*6.40*	*6.75*
40 - 44	7,700	*5.65*	9,507	*6.40*	*6.10*	*6.30*
45 - 49	8,800	*6.50*	9,519	*6.40*	*6.45*	*6.35*
50 - 54	10,300	*7.65*	10,023	*6.75*	*7.20*	*6.95*
55 - 59	10,600	*7.95*	9,705	*6.55*	*7.05*	*6.75*
60 - 64	9,300	*6.95*	7,973	*5.35*	*6.00*	*5.75*
65 - 69	8,300	*6.20*	7,060	*4.8*	*5.25*	*4.90*
70 - 74	9,000	*6.70*	7,248	*4.9*	*5.45*	*4.95*
75 - 79	7,200	*5.35*	5,737	*3.95*	*4.30*	*3.60*
80 - 84	4,800	*3.55*	3,976	*2.65*	*2.85*	*2.55*
85 – 89	2,900	*2.10*	2,477	*1.70*	*1.70*	*1.55*
90+	1,700	*1.25*	1,528	*1.00*	*0.95*	*0.90*

Figure 16: Population proportion by age-band 2021

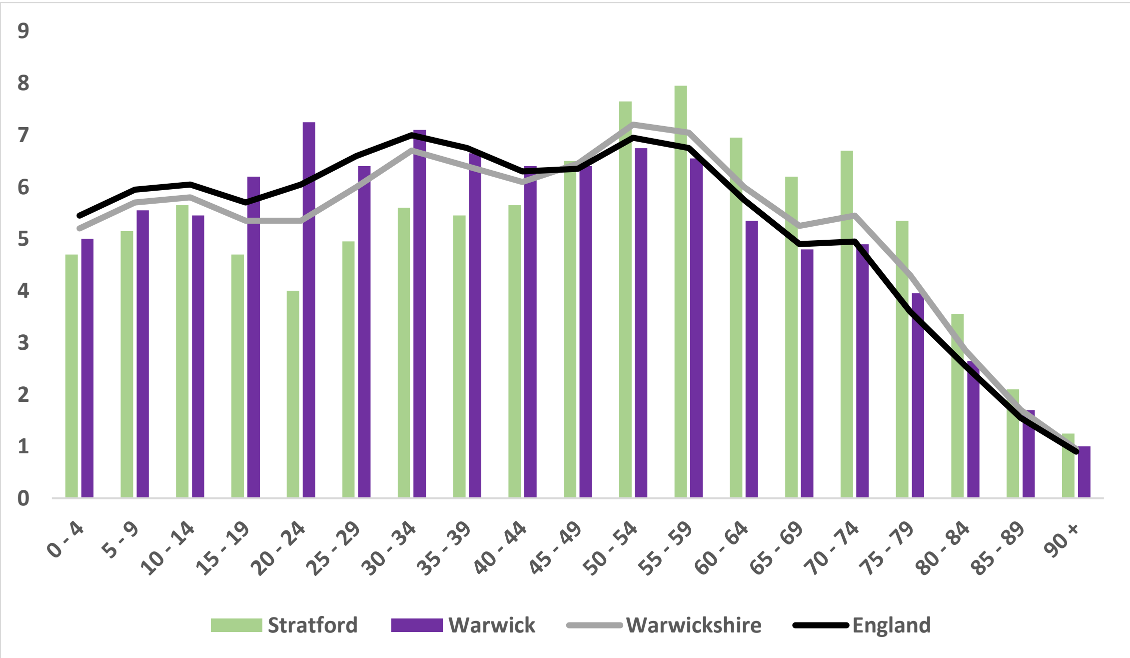


Figure 17: Population breakdown by age and sex 2021: Stratford-on-Avon

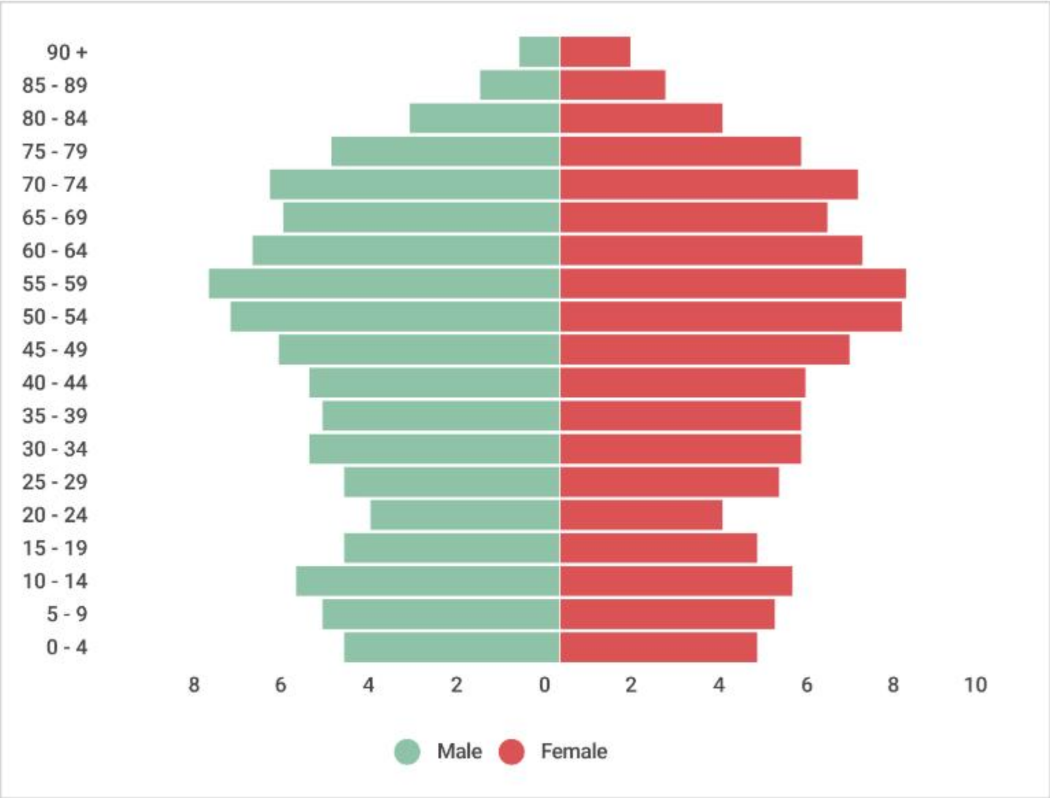


Figure 18: Population breakdown by age and sex 2021: Warwick

Source: Census 2021

Workforce Occupation

Both Stratford-on-Avon and Warwick Districts have a greater proportion of their workforce employed in senior or professional roles than the English average, with Stratford having a slightly higher proportion than Warwick (see Table 20/Figure 19).

Warwick District has a much higher than average proportion of employment in associate professional and technical roles than the English average.

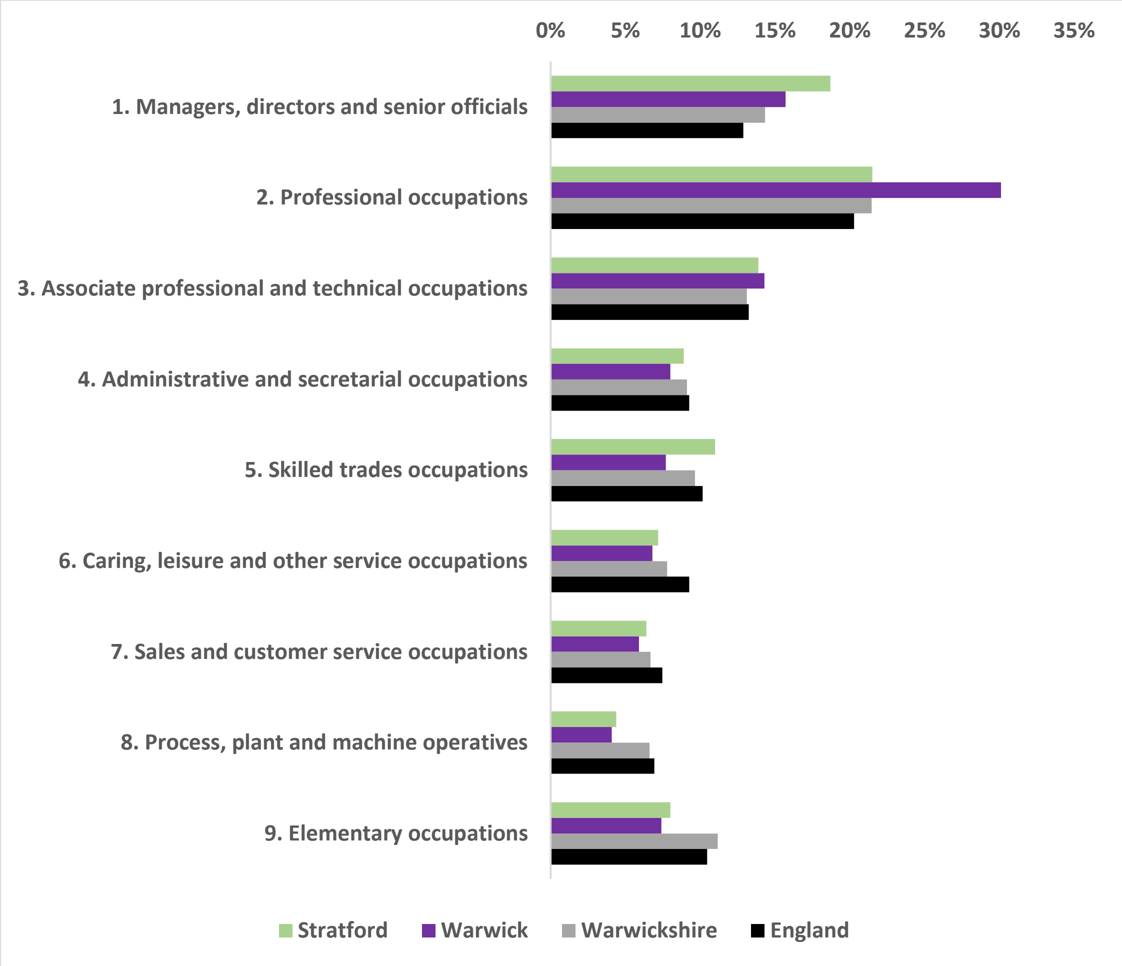
Stratford-on-Avon has a greater proportion of its workforce in elementary occupations and process, plant and machine roles than the English average.

Table 20: Proportion of workforce by occupation 2021

	SOA	Warwick	SOA	Warwick	Warks	England
	Count	Count	%	%	%	%
1: Managers, directors and senior officials	12,363	11,452	*18.7*	*15.7*	*14%*	*13%*
2: Professional occupations	14,213	21,877	*21.5*	*30.1*	*21%*	*20%*
3: Associate prof & tech occupations	9,233	10,382	*13.9*	*14.3*	*13%*	*13%*
4: Administrative and secretarial occupations	5,890	5,851	*8.9*	*8*	*9%*	*9%*
5: Skilled trades occupations	7,299	5,590	*11*	*7.7*	*10%*	*10%*
6: Caring, leisure and other service occupations	4,777	4,920	*7.2*	*6.8*	*8%*	*9%*
7: Sales and customer service occupations	4,247	4,299	*6.4*	*5.9*	*7%*	*7%*
8: Process, plant and machine operatives	2,897	3,013	*4.4*	*4.1*	*7%*	*7%*
9: Elementary occupations	5,317	5,364	*8*	*7.4*	*11%*	*10%*

Source: Census 2021

Figure 19: Proportion of workforce by occupation



Source: Census 2021

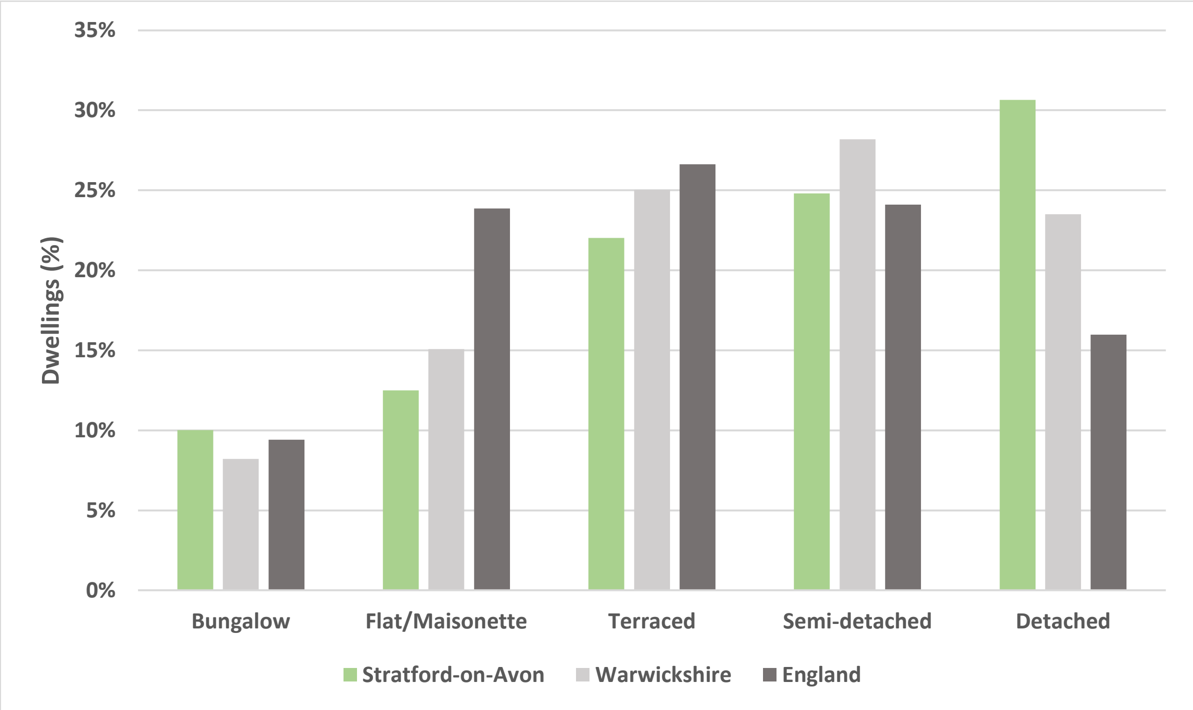
Housing

Dwelling Numbers

Stratford-on-Avon

According to the Valuation Office list, there were 62,200 properties in Stratford-on-Avon District in 2021. Of these, the most common dwelling type is a detached house. The housing stock available does not follow the same pattern as Warwickshire or England, as seen in Figure 20: Stratford-on-Avon has more bungalows and detached houses than the Warwickshire or England average, and fewer flats/maisonettes, terraces and semi-detached dwellings.

Figure 20: Dwelling types Stratford-on-Avon

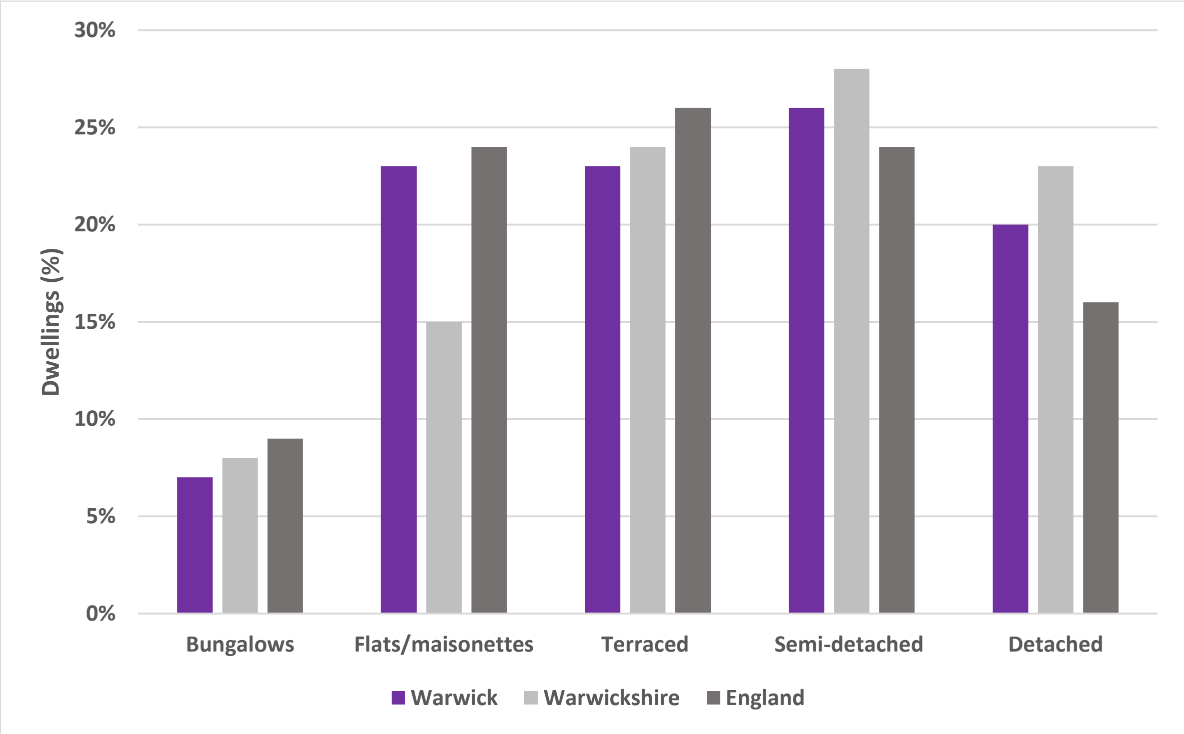


Source: data.Warwickshire.gov.uk

Warwick

According to the Valuation Office list, there were 66,150 properties in Warwick District in 2021. Of these, the most common dwelling type is a semi-detached house. Warwick has more flats than the Warwickshire average, and more semi-detached and detached than the English average (see Figure 21).

Figure 21: Dwelling types Warwick



Source: data.Warwickshire.gov.uk

House Prices

The median house price for Stratford-on-Avon District was £335,000 and was £321,500 for Warwick in the year ending March 2022, well above the England median of £270,000 and the Warwickshire median of £273,000.

The median house price in Stratford-on-Avon District has risen £40,000 or 14% over the last five years since March 2017. Warwick's median house price has risen £39,000 or 14% over the same period.

The lower quartile house price for Stratford-on-Avon District in March 2022 was £250,000 (25% of houses were below this price, 75% above). That for Warwick District was also £250,000. This is higher than the lower quartile for England of £180,000, and that for Warwickshire of £200,000.

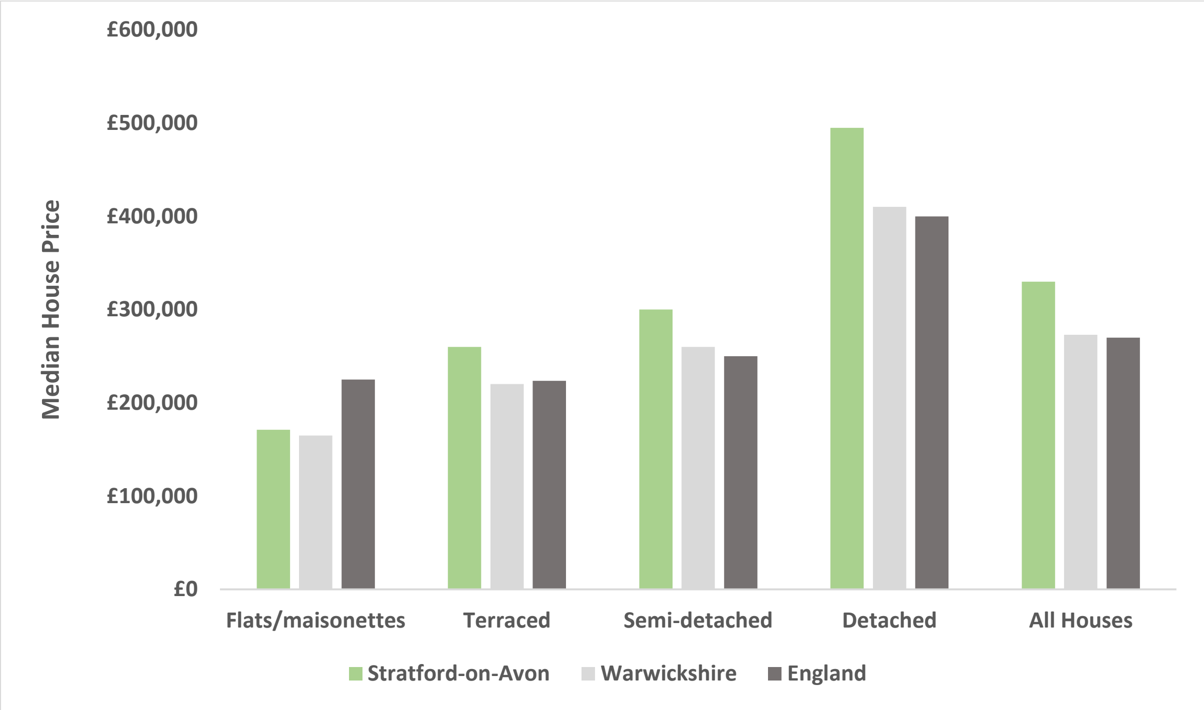
The tenth percentile price for Stratford-on-Avon District in March 2022 was £186,500 (10% of houses were below this price, 90% above). That for Warwick District was £185,000. This compares to the tenth percentile price of £125,000 for England and £152,000 for Warwickshire.

Figures 22 and 23 show the median house prices for different house types within Stratford-on-Avon District and Warwick District respectively along with the average for Warwickshire and England.

The median detached price for Stratford-on Avon is 24% higher than the England average, and 21% above the Warwickshire average, while that for Warwick is 25% higher than the England average and 22% above the Warwickshire average.

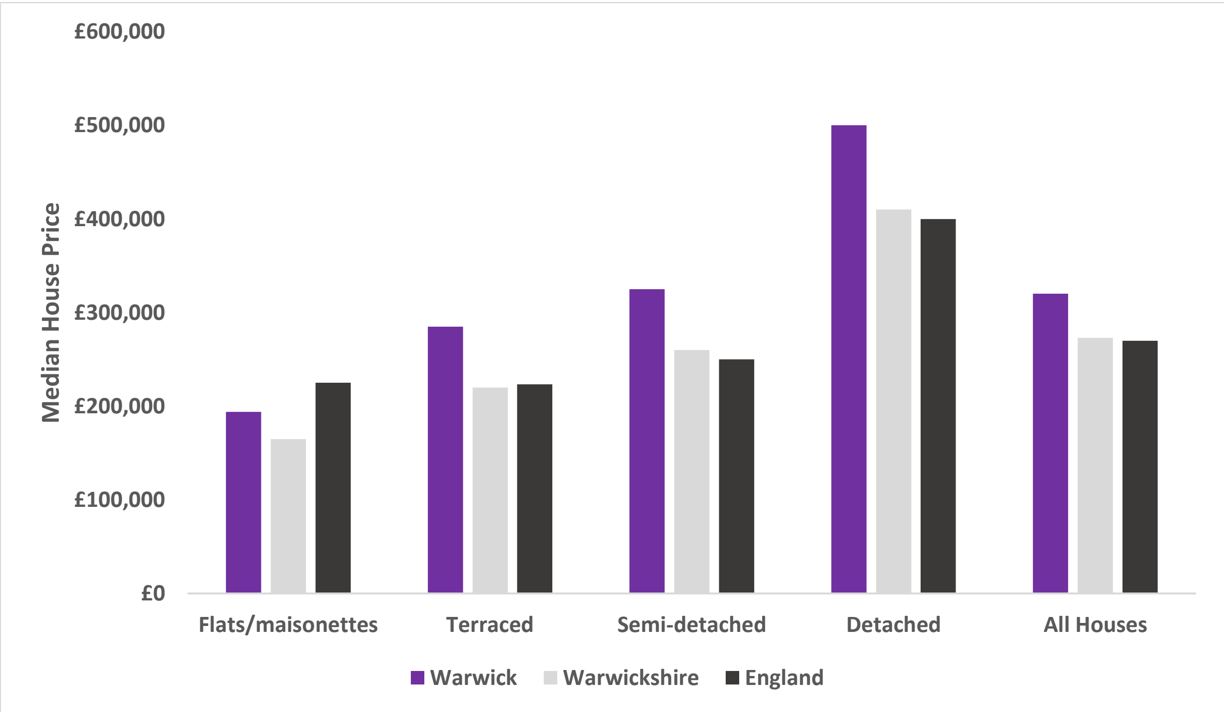
Terraced houses in Stratford-on-Avon are 16% above the England average and 18% above the Warwickshire average. Terraced houses in Warwick are 28% above the England and 30% above the Warwickshire average.

Figure 22: Median house price by dwelling type – Stratford-on-Avon 2021



Source: data.Warwickshire.gov.uk

Figure 23: Median house price by dwelling type – Warwick 2021



Source: data.Warwickshire.gov.uk

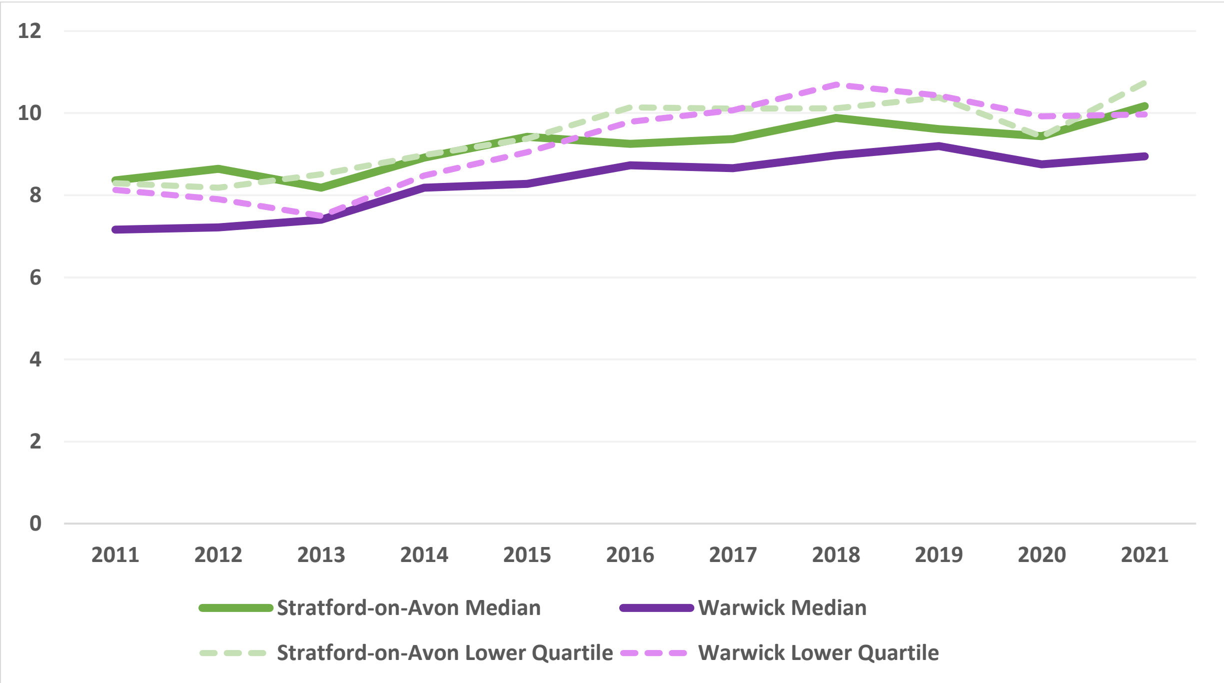
Ratio of House Prices to Earnings

The median house price to median earnings ratio in 2021 stood at 10.17 for Stratford-on-Avon and 8.95 for Warwick. Stratford-on-Avon's ratio was the third highest in the West Midlands region, with only Wychavon and Malvern Hills higher at 10.64 and 10.26 respectively. By comparison, the ratio for Warwickshire was 8.55 and that for England was 9.05.

The lower quartile house price to lower quartile earnings ratio in 2021 in Stratford-on-Avon was 10.74, while that for Warwick was 9.97. These were in the top four ratios for the entire West Midlands region, alongside Malvern Hills at 10.57 and Wychavon at 10.53. By comparison, the lower quartile house price to earnings ratio for Warwickshire was 8.67 and for England was 8.04.

Figure 24 below shows that the lower quartile price to earnings ratio grew faster than the median for both districts meaning those in the lower income bracket were affected worse than those with median income by price rises.

Figure 24: Earnings to Median and Lower Quartile House Price Ratios



Source: ONS House price to workplace-based earnings ratio

Ownership and tenancy

While Warwick District follows the county and national averages in terms of housing tenure, Stratford-on-Avon District has a different pattern of home ownership. More homes in Stratford-on-Avon are owned outright by the householders than the England or Warwickshire average, while fewer homes are rented privately. Stratford District Council owns/administers very little of its own socially rented housing stock, with housing associations responsible for much more social rent than is typical within a local authority.

Table 21: Ownership and tenancy

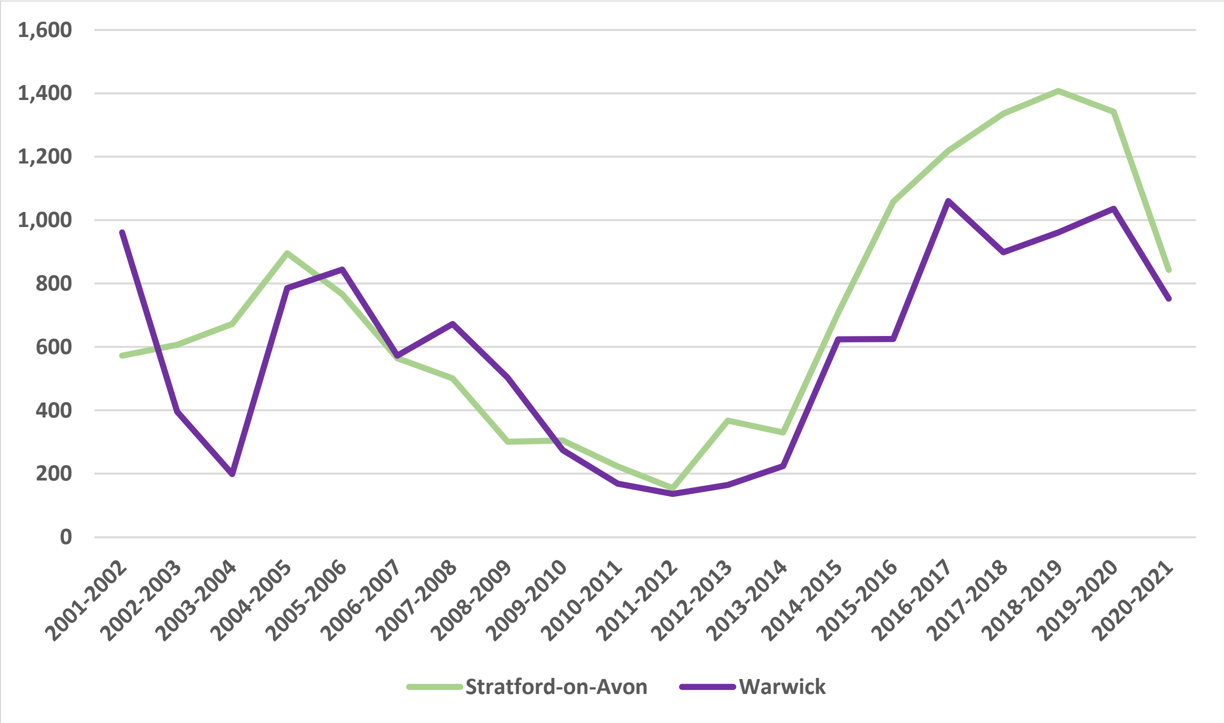
	Stratford-on-Avon	Stratford-on-Avon	Warwick	Warwick	Warks	England
	Count	**%**	**Count**	**%**	**%**	**%**
Owned: Owned outright	24,156	*41*	19,157	*34*	*36*	*33*
Owned: Owned with a mortgage or loan	17,967	*30*	19,954	*31*	*32*	*29*
Shared ownership (part owned and part rented)	1,060	*2*	510	*1*	*1*	*1*
Private rented: Private landlord or letting agency	7,055	*12*	9,786	*17*	*15*	*18*
Private rented: Other	1,308	*2*	727	*2*	*2*	*2*
Social rented: Rented from council /LA	958	*2*	5,337	*8*	*7*	*8*
Social rented: Other	6,948	*12*	7,866	*6*	*7*	*9*
Living rent-free	11	*<1*	679	*<1*	*<1*	*<1*

Source: ONS Census 2021

House Building

There were 843 net additions to dwelling stock in Stratford-on-Avon in 2020-21, while there were 752 in Warwick. Both authorities had seen significant rise in the number of net additional dwellings from 2014-15 onwards, reaching a peak of 1,408 in Stratford in 2018-19, and 1,060 in Warwick in 2016-17 (see Figure 25).

Figure 25: Net additions to dwellings Stratford-on-Avon & Warwick 2001-21



Source: data.warwickshire.gov.uk

Deprivation

English Indices of Multiple Deprivation 2019

The Index of Multiple Deprivation (IMD) is a huge dataset, ranging across the domains of employment, income, health, crime, environment, education, and skills, and housing and access to services; these various domains are combined to create various composite indicators.

The IMD for England provides measures of deprivation at various geographical levels. For the 2019 version, versions of the index are available for local authorities, Local Enterprise Partnerships (LEPS) and Clinical Commissioning Areas (CCAs). Lower-Layer Super Output Areas (LSOAs) are small areas designed to be of a similar population size, with an average of approximately 1,500 residents or 650 households. The LSOAs used in the 2019 IMD are based on population data from the 2011 Census.

There are 32,844 LSOAs in England and each are ranked according to their deprivation score, with the most deprived given a rank of 1 and the least deprived a rank of 32,844. At this point, it is worth pointing out that that the IMD is a measure of relative deprivation for small areas, and not a quantification of deprivation.

LSOAs are allocated into deciles according to their deprivation ranking. One way of assessing the extent to which a local authority is 'deprived' or 'not deprived' is by calculating the proportion of LSOAs in the area falling into either the first (most deprived) or tenth (least deprived) deciles. This does not mean, however, that local authority areas with a small proportion of very deprived LSOAs will not have some LSOAs in the first (highest) decile, or that local authorities with a high proportion of LSOAs in the first decile will not have a number of LSOAs in the lowest (tenth) decile.

The IMD is constructed from seven domains. Each domain is calculated separately and the overall index is a weighted sum of the domains. The domains and their weights are listed below:

Domain	Weight
Income Deprivation Domain	22.5%
Employment Deprivation Domain	22.5%
Health Deprivation and Disability Domain	13.5%
Education, Skills and Training Deprivation Domain	13.5%
Barriers to Housing and Services Domain	9.3%
Crime Domain	9.3%
Living Environment Deprivation Domain	9.3%

Overall Results 2019

The IMD average score for Stratford-on-Avon in 2019 was 11.73, in Warwick it was 12.01 Compared with other local authorities, Stratford-on-Avon District area ranks 266 out of 326, while Warwick ranks 259.

Overall Results by LSOA 2019

Of the 73 LSOAs within Stratford-on-Avon District, four were ranked in the bottom four deciles i.e. 40% most deprived LSOAs across England. The rank of all 73 LSOAs can be seen in Table 22 below.

Of the 80 LSOAs within Warwick District, seven were ranked in the bottom four deciles, with one LSOA – Lillington East - ranking in the second bottom decile i.e. one of the 20% most deprived LSOAs in England. The rank of all 80 LSOAs can be seen in Table 23 below.

Table 22: Overall Index of Deprivation LSOA Score, Decile & Rank – Stratford on-Avon District

LOWER SUPER OUTPUT AREA - ORDER WITHIN DISTRICT		Index of Multiple Deprivation Score 2019	Index of Multiple Deprivation Decile	Rank
1	Stratford Mount Pleasant East	27.01	3	9,586
2	Alcester North & Conway	22.79	4	12,190
3	Maybird (Stratford)	21.68	4	13,014
4	Henley East and Beaudesert	21.64	4	13,051
5	Studley South	21.43	5	13,226
6	Alcester East & Island	21.03	5	13,537
7	Bidford East, Waterloo & Broom	20.33	5	14,060
8	Wellesbourne West	19.29	5	15,019
9	Deppers Bridge, Chester & Kings	17.22	6	16,796
10	Long Compton	17.17	6	16,846
11	Old Town & Town Centre South (Stratford)	16.84	6	17,145
12	Dunnington and Salford Priors	16.42	6	17,549
13	Studley North	16.06	6	17,890
14	Lighthorne & Lighthorne Heath	15.90	6	18,039
15	Burton Dassett	15.70	6	18,243
16	Tanworth	15.24	6	18,692
17	Southam West	15.21	6	18,711
18	Long Itchington East	15.15	6	18,772
19	Aston Cantlow	14.93	6	18,991
20	Town Centre North (Stratford)	14.34	6	19,597
21	Brailes	14.33	6	19,615
22	Kineton Castle, Lt. Kineton & Combrook	14.03	7	19,918
23	Fenny Compton, Farnborough & Avon Dassett	13.74	7	20,225
24	The Avenue (Stratford)	13.44	7	20,567
25	Shipston West and Town Centre	13.27	7	20,775

26	Sambourne	12.91	7	21,150
27	Bardon	12.83	7	21,228
28	Wellesbourne North	12.66	7	21,420
29	Shipston North	12.63	7	21,454
30	Napton on the Hill	12.10	7	22,041
31	Studley West & Common	12.08	7	22,073
32	Shottery North & Racecourse	12.01	7	22,158
33	Kinwarton	11.90	7	22,271
34	Wootton Wawen	11.79	7	22,416
35	Welford	11.47	7	22,776
36	Vale of the Red Horse	11.23	8	23,072
37	Quinton	11.15	8	23,159
38	Moreton Morrell, Ashorne & Newbold Pacey	10.56	8	23,819
39	Tredington & Blackwell	10.32	8	24,112
40	Ladbroke & Priors	10.32	8	24,119
41	Kineton, Chadshunt & Compton Verney	10.30	8	24,138
42	Snitterfield & Wolverton	10.22	8	24,242
43	Bishopton	10.16	8	24,295
44	Claverdon	10.06	8	24,442
45	Bridgetown South East	9.91	8	24,636
46	Long Itchington West & Ufton	9.75	8	24,824
47	Studley East & Priory	9.58	8	25,031
48	Newbold-on-Stour, Ilmington East & Whitchurch	9.44	8	25,213
49	Hampton Lucy & Fulbrook	9.43	8	25,231
50	Bidford South, Marlcliff and Barton	9.41	8	25,244
51	Ettington	9.12	8	25,635
52	Stratford Mount Pleasant West	9.04	8	25,747
53	Stockton	8.75	8	26,123
54	Earlswood	8.73	8	26,132
55	Wellesbourne East, Walton & Airfield	8.72	8	26,142
56	Alveston Hill and Rural	8.38	9	26,578
57	Bidford West and Wixford	8.09	9	26,955
58	Southam East	7.74	9	27,374
59	Southam North	7.62	9	27,520
60	Alcester South, Arrow & Weethley	7.20	9	28,064
61	Wellesbourne South	7.04	9	28,267
62	Abbey, Grammar & Kings Coughton	7.01	9	28,310
63	Southam South & Town Centre	6.98	9	28,351
64	Tiddington & Alveston	6.14	9	29,302
65	Bishops Itchington	5.97	9	29,502
66	Old Town (Stratford)	5.44	10	30,082
67	Shottery South & Racecourse	5.35	10	30,168
68	Henley West	5.16	10	30,367
69	Bridgetown	4.71	10	30,799

70	Bridgetown North East and Golf Course	4.00	10	31,508
71	Shipston South & Furze Hill	3.90	10	31,597
72	Clopton & Welcombe Hills	2.95	10	32,259
73	Harbury	1.14	10	32,825

Table 23: Overall Index of Deprivation LSOA Score, Decile & Rank – Warwick District

LOWER SUPER OUTPUT AREA - ORDER WITHIN DISTRICT		**Index of Multiple Deprivation Score 2019**	**Index of Multiple Deprivation Decile**	**Rank**
1	Lillington East	43.845	2	3,287
2	Brunswick North West and Foundry	30.947	3	7,580
3	Brunswick South East	29.543	3	8,236
4	Brunswick South West and Kingsway	28.876	3	8,562
5	Warwick - Packmores West & The Cape	27.142	3	9,510
6	Sydenham West	26.40	4	9,935
7	Lillington South	26.10	4	10,121
8	Leamington Town centre – Portland Street	21.702	4	12.996
9	Warwick - Shakespeare Avenue North	20.565	5	13,881
10	Emscote	20.004	5	14,342
11	Brunswick South & Cemetery	19.972	5	14,372
12	Whitnash North	19.505	5	14,808
13	Lillington West	19.497	5	14,817
14	Emscote & Spinney Hill North East	19.492	5	14,829
15	Lapworth South, Bushwood, Lowsonford & Rowington	19.424	5	14,888
16	Brunswick North East	19.156	5	15,109
17	Wedgenock & Woodloes West	18.295	5	15,878
18	Sydenham North	18.277	5	15,895
19	Leamington - Old Town West & Railway Bridge	17.703	5	16,392
20	Leamington - Old Town North West	17.526	6	16,533
21	Milverton South East	17.178	6	16,837
22	St Nicholas Park, Myton & Emscote South	16.39	6	17,571
23	Campion Hills & Newbold Comyn	15.985	6	17,964
24	Kenilworth - Abbey East	14.675	6	19,256
25	Warwick - The Cape & Wedgenock	14.312	6	19,629
26	Leamington Town Centre – Regent Street	14.308	6	19,635
27	Wroxhall, Hasely & Honiley	14.148	7	19,789
28	Sydenham South & East	13.286	7	20,750
29	Kenilworth Town Centre South	13.186	7	20,856
30	Ladyes Hills & Mill End West	13.022	7	21,030
31	The Moorings & Myton North	12.901	7	21,160
32	Emscote Lawns	12.709	7	21,375

33	Stoneleigh	12.594	7	21,499
34	Bishops Tachbrook South	12.494	7	21,618
35	Milverton South West	11.795	7	22,410
36	Leamington - Old Town North	11.567	7	22,677
37	Leamington - Old Town East & Sydenham Ind Est	11.07	8	23,248
38	Cubbington East	11.008	8	23,329
39	Manor South & Round Oaks	10.76	8	23,590
40	Warwick Town Centre & Racecourse	10.537	8	23,846
41	Woodloes South East & Spinney Hill South	10.178	8	24,283
42	Milverton Cliffe	10.047	8	24,456
43	Lapworth North, Baddesley Clinton & High Cross	9.88	8	24,665
44	St John's Playing Fields	9.842	8	24,710
45	Claverdon North	9.664	8	24,925
46	Milverton East	9.628	8	24,975
47	Bubbenhall, Wappenbury, Weston & Eathorpe	9.553	8	25,057
48	Warwick Town Centre North	8.917	8	25,893
49	Offchurch & Hunningham	8.9	8	25,923
50	Manor South West	8.863	8	25,982
51	Warwick - Priory Park, Packmores & Hospital	8.646	8	26,241
52	Hatton & Hampton Magna	8.54	9	26,377
53	Leek Wootton, Guys Cliffe & Beausale	8.522	9	26,393
54	Crown North East	8.476	9	26,448
55	Whitnash - St Margarets	8.417	9	26,538
56	Sherbourne, Barford & Wasperton	8.37	9	26,595
57	Radford Semele	8.228	9	26,789
58	Whitnash West	7.894	9	27,194
59	New Cubbington, Blackdown & Old Milverton	7.491	9	27,703
60	Manor West	7.36	9	27,869
61	Whitnash East & Millponds	7.01	9	28,315
62	Hampton-on-the-hill	6.587	9	28,803
63	Whitnash South	6.581	9	28,808
64	Borrowell	6.549	9	28,835
65	Warwick Gates North, Tachbrook Park & Myton South	6.234	9	29,165
66	Cubbington West & New Cubbington	6.043	9	29,414
67	Bishops Itchington	5.967	9	29,509
68	Woodloes East	5.559	10	29,958
69	Kenilworth - Abbey Fields	5.332	10	30,184
70	Knowle Hill & Glasshouse	5.297	10	30,223
71	Bridge End, Castle & Stratford Road East	4.86	10	30,640
72	Mill End East & Crackley	4.615	10	30,891
73	Woodloes North	4.558	10	30,947
74	Milverton West	4.304	10	31,215

75	Bishops Tachbrook North & Warwick Gates	4.214	10	31,293
76	Warwick Gates	4.001	10	31,507
77	Whitemoor	3.73	10	31,722
78	Castle End & Windy Arbour	3.57	10	31,856
79	Milverton North	3.471	10	31,931
80	Thickthorn & Castle End	3.063	10	32,204
81	Glass House & Windy Arbour	2.488	10	32,496
82	Manor North	2.201	10	32,605

Results by Domain

The English Index of Deprivation is calculated from a number of different domains covering different aspects of deprivation. Each LSOA is ranked into deciles for each domain:

1st decile = 10% most deprived

2nd decile = 11-20% most deprived

3rd decile = 21-30% most deprived

Etc

Below are summaries for each of the seven main domains which make up the Indices highlighting which LSOAs fell into the bottom three deciles. Table 21 shows the LSOAs in Warwick District which fall in these deciles 1-3, and Table 22 shows those from Stratford-on-Avon District.

Income Deprivation

By and large, Stratford and Warwick residents are relatively well-paid and less reliant on income support: Very few LSOAs fall into the lower deciles for this measure. One Warwick LSOA was in the 2nd decile (i.e. bottom 20% all LSOAs) for income deprivation - Lillington East.

One Stratford LSOA and four Warwick LSOAs were in the 3rd decile for income deprivation: Alcester East & Island, Lillington South, Sydenham West, Brunswick South East and Warwick - Packmores West & The Cape.

Employment Deprivation

As for income, so both districts are relatively well-off in terms of employment, with low unemployment rates and unemployment-related benefits claimants. The same Warwick LSOA which fell into the 2nd decile for Income deprivation - Lillington East - also fell into the 1st decile - i.e. the most deprived 10% - for employment deprivation.

One Stratford LSOA was in the 2nd decile for employment deprivation - Stratford Mount Pleasant East.

Five Warwick and One Stratford LSOA were in the 3rd decile for employment deprivation - Brunswick South East, Brunswick North West & Foundry, Emscote & Spinney Hill North

East, Warwick - Packmores West & The Cape, Sydenham West and Alcester North & Conway.

Education Deprivation

Stratford and Warwick are generally very well educated districts. However, there are pockets where proportions of the population have little in the way of qualifications, lower school exam results or proportion of children not going on to advanced education/higher education. One Warwick LSOA was one of the 10% most deprived LSOAs for education deprivation - Lillington East.

Five Warwick LSOAs and two Stratford LSOAs were in the 2nd decile (bottom 20%) for education deprivation: Brunswick South West & Kingsway, Brunswick South East, Brunswick North West & Foundry, Lillington South, Warwick-Packmores West & The Cape, Alcester North & Conway and Studley South.

Health Deprivation

This measure is derived from a measure of premature death, morbidity/disability ratio, rate of emergency admission to hospital and rate of mood/anxiety disorders including suicide. While both are generally relatively healthy districts, three Warwick LSOAs and one Stratford LSOA fell into the 2nd decile for health deprivation - Brunswick South West & Kingsway, Lillington East, Sydenham West and Stratford Mount Pleasant East.

Crime Deprivation

This measure is based on the number of reported violent crimes, burglaries, thefts, and criminal damage. Four Warwick LSOAs were in the 1st decile for crime deprivation - Brunswick South West & Kingsway, Milverton South East, Leamington – Old Town North West and Leamington Town Centre – Portland Street.

Four Warwick LSOAs were in the 2nd decile - Brunswick North West & Foundry, Campion Hills & Newbold Comyn, and Leamington Town Centre – Regent Street.

Barriers to Housing & Services Deprivation

This measure covers physical and financial accessibility of housing and key local services, such as distance to post office/primary school/supermarket or store/GP surgery. The rural nature of the Districts and high house prices mean that a number of LSOAs across Stratford-on-Avon and Warwick fall into quite low deciles for this measure.

Four Warwick LSOAs and twelve Stratford LSOAs were among the 10% most deprived LSOAs for Barriers to Housing deprivation - Hatton & Hampton Magna, Bubbenhall, Wappenbury, Weston & Eathorpe, Wroxhall, Haseley & Honiley, Stoneleigh, Aston Cantlow, Bardon, Brailes, Burton Dassett, Ettington, Ladbroke & Priors, Long Compton, Snitterfield & Wolverton, Hampton Lucy & Fulbrook, Tanworth, Vale of the Red Horse and Moreton Morell, Ashorne & Newbold Pacey.

Six Warwick and eleven Stratford LSOAs were among those in the 2nd decile of LSOAs, while ten Warwick and ten Stratford were in the 3rd decile.

Living Environment Deprivation

This measure covers houses which lack central heating, social and private rental homes which fail to meet Decent Homes Standard, air quality/pollution and road traffic accidents involving pedestrians and cyclists. Some areas of each district do perform relatively poorly on this measure: Four Warwick and six Stratford LSOAs were among the 10% most deprived LSOAs for Living Environment deprivation - Lapworth South, Bushwood, Lowsonford & Rowington, Wroxhall, Haseley & Honiley, Brailes, Burton Dassett, Fenny Compton, Farnborough & Avon Dassett, Kineton, Chadshunt & Compton Verney, Long Compton and Stratford Town Centre North.

Four Warwick and nine Stratford LSOAs were in the 2nd decile, while nine Warwick and seven Stratford LSOAs were in the 3rd decile

Table 24: LSOAs in 1st, 2nd or 3rd decile Deprivation: Summary – Warwick District

	Income	Employment	Education	Health	Crime	Housing	Living Environment
Lillington East	2nd	1st	1st	2nd			
Lillington South	3rd		2nd				
Sydenham West	3rd	3rd		2nd			
Brunswick North East					3rd		2nd
Brunswick North West & Foundry		3rd	2nd		2nd		3rd
Brunswick South East	3rd	3rd	2nd		3rd		
Brunswick South West & Kingsway			2nd	2nd	1st		
Leamington Old Town North					2nd		3rd
Leamington Old Town North West					1st		2nd
Leamington Old Town East & Sydenham Ind					3rd		
Leamington West & Railway Bridge					3rd		
Leamington Town Centre – Portland Street					1st		2nd
Leamington Town Centre – Regent Street					2nd		1st
Milverton South East					1st		2nd
Campion Hills & Newbold Comyn					2nd		
Warwick – Packmores West & The Cape	3rd	3rd	2nd				
Emscote & Spinney Hill North East		3rd					
Hatton & Hampton Magna						1st	
Bubbnhall,Wappenbury,Weston & Eathorpe						1st	
Wroxhall, Haseley & Honiley						1st	1st
Stoneleigh						1st	3rd
Lapworth S, Bushwd, Lowsonfd & Rowingtn					3rd		1st
Bishops Tachbrook South							3rd
Lapworth N, Baddesley Clinton & High Cross					3rd		3rd
Leek Wootton, Guys Cliffe & Beausale							3rd
Milverton Cliffe							3rd
Offchurch & Hunningham							3rd
Emscote Lawns							3rd

Table 25: LSOAs in 1st, 2nd or 3rd decile Deprivation: Summary – Stratford-on-Avon District

	Income	Employment	Education	Health	Crime	Housing	Living Environment
Alcester East & Island	3rd		3rd				
Stratford Mount Pleasant East		2nd	3rd	2nd			
Alcester North & Conway		3rd	2nd				
Studley South			2nd				
Maybird			3rd				
Bidford East, Waterloo & Broom			3rd			3rd	
Wellesbourne West			3rd			3rd	
Tanworth						1st	2nd
Bardon						1st	3rd
Aston Cantlow						1st	2nd
Moreton Morrell, Ashorne & Newbold Pacey						1st	
Brailes						1st	1st
Hampton Lucy & Fulbrook						1st	
Snitterfield & Wolverton						1st	
Long Compton						1st	1st
Burton Dassett						1st	1st
Vale of the Red Horse						1st	2nd
Ettington						1st	3rd
Ladbroke & Priors						1st	
Deppers Bridge, Chester & Kings						2nd	3rd
Sambourne						2nd	3rd
Earlswood						2nd	
Wellesbourne East, Walton & Airfield						2nd	
Long Itchington West & Ufton						2nd	
Welford						2nd	2nd
Claverdon						2nd	
Kinwarton						2nd	3rd
Newbold-on-Stour, Ilmington East & Whitchurch						2nd	3rd
Wellesbourne South						2nd	
Tredington & Blackwell						2nd	
The Avenue						3rd	

Wootton Wawen						3rd	2nd
Fenny Compton, Farnborough & Avon Dassett						3rd	1st
Napton on the Hill						3rd	2nd
Dunnington and Salford Priors						3rd	2nd
Abbey, Grammar & Kings Coughton						3rd	
Lighthorne & Lighthorne Heath						3rd	3rd
Bidford West and Wixford						3rd	
Kineton, Chadshunt & Compton Verney							1st
Town Centre North							1st
Old Town & Town Centre South							2nd
Quinton							2nd

Climate Change

Both Stratford-on-Avon and Warwick District Councils declared a climate emergency in 2019. Following this, each council formed a Climate Change Task group with the intention of developing a programme of work to counter the effects of climate change.

The main causes of carbon emissions across Stratford-on-Avon and Warwick Districts can be seen in Table 26 below.

The main cause of carbon emissions in both districts is **on-road transport,** which makes up nearly 50% of emissions across South Warwickshire. This is followed by emissions from **residential buildings, mainly from heating**- either central heating or hot water – which makes up approximately 20%, or one fifth of emissions.

Table 26: Causes of Carbon Emissions in South Warwickshire 2018

Stratford-on-Avon		**Warwick**	
Transport	**53%**	**Transport**	**55%**
• Road	47%	• Road	48%
• Rail	1%	• Rail	1.2%
• Aviation	4%	• Aviation	6%
Residential buildings	**18%**	**Residential buildings**	**20%**
• Heating, hot water	13%	• Heating, hot water	15%
• Lighting, appliances	5%	• Lighting, appliances	5%
Industrial buildings	11%	Industrial buildings	11%
Commercial buildings	4%	Commercial buildings	5%
Institutional buildings	1%	Institutional buildings	2%
Agriculture (off road transp etc)	2%	Agriculture (off road transp etc)	<1%
Livestock	5%	Livestock	1%
Industrial Processes	3%	Industrial Processes	4%

Source: SCATTER analysis – www.scattercities.com/data/inventory

SWOT analysis

SWOT Summary	
Strengths	**Healthy economic growth rates** – total GVA has grown faster than the English average over the past 10 years, and GVA per hour are both above average. **Competitive business base** – There are 113 businesses per 1,000 working-age population in Stratford-on-Avon and 86 in Warwick. This compares to the England average of 115 and West Midlands average of 101. In the UK Competitiveness Index Warwick ranks 37th for competitiveness out of all districts and Stratford ranks 54th, 1st and 3rd in the West Midlands respectively. **Qualifications** – both Stratford and Warwick are above UK/West Midlands average in terms of % population with NVQ4 level qualifications or above. This means there is a well-qualified workforce attractive to businesses in a variety of sectors. **Quality of life** – the South Warwickshire area is an attractive area for young professionals, families and older people: Excellent schools, attractive housing stock, good links with London/Birmingham from main centres of Warwick and Leamington Spa, attractive public open spaces and cultural offer. According to Rightmove 2020, Leamington Spa was named 3rd happiest place in GB and Stratford-upon-Avon was 7th.
Weaknesses	**Imbalance in sectoral spread of GVA in Stratford-on-Avon** – over 50% of Stratford's GVA comes from only 2 industries: manufacturing and real estate. Warwick's GVA is more balanced. This over-reliance on specific sectors leaves Stratford open to economic difficulty if that sector is hit by downturn/outside threats e.g. Brexit. **Low paid job market** – while Stratford and Warwick have 'buoyant job markets' with 1.17 jobs per person in Stratford and 1.09 in Warwick, these jobs are often low paid in sectors such as retail, social care and food and drink service. **Older population** - The lack of younger people in Stratford means that existing businesses may look to surrounding districts for labour and potential businesses may choose to locate in the north of the county which has a better labour supply. Poor transport links between Stratford and Warwick districts would hinder younger people in Stratford taking advantage of jobs in Warwick/be unsustainable. **Business survival** – New businesses tend to struggle more in Stratford than average, particularly in the first year, but once they reach 5 years of age are more likely to survive. Warwick businesses are more likely to survive than average in their early development. **Rurality** – Similar to the problem of an ageing population, Stratford's geography also means that it does not have the same density of population as Warwick and much poorer transport infrastructure, exacerbating traffic issues and making it less attractive to both businesses and employees. The roll-out of superfast broadband and a greater flexibility in working practices offered by employers, e.g. more working from home, could counteract this.

Opportunities

Joint South Warwickshire Partnership – by working together, Stratford-on-Avon and Warwick districts can take advantage of each other's strengths and support any areas of weakness which each may face as a district e.g. access to young labour, diverse housing offer, business clustering.

Advanced Manufacturing and Engineering – there is a corridor of businesses, research and development centres running from Gaydon up to Coventry and University of Warwick focusing on innovation within the manufacturing and engineering sectors and benefitting from £69m investment. Attracting new businesses in this sector and supporting current businesses to grow will be key to growing GVA and promoting more efficiency and productivity.

Low-carbon technologies/Intelligent Mobility – Warwickshire & Coventry is leading research and development into this industry, building upon its automotive manufacturing background. Already home to key businesses and support organisations in fuel cells, hydrogen power systems, electric vehicles, materials development, the area has also seen inward investment into e.g. driverless vehicles technology (UK CITE).

Available land – there are key sites available across South Warwickshire which could sustain business growth in different sectors e.g. Tournament Park Warwick, Alcester Road Stratford-upon-Avon, Spa Park Leamington.

Growing tourism sector: staying visitors - both Stratford and Warwick districts have seen visitor numbers growing over the past 10 years, and growing revenue, which stood at £642m pounds in 2019 for the Shakespeare's England area. Revenue is particularly associated with UK staying visitors. Overnight stays by overseas visitors are growing, even against the trend of falling overseas visits to the UK. Tourism employs approximately 14,500 across the Shakespeare's England area. Coventry City of Culture 2021 and Birmingham Commonwealth Games 2022 both provide opportunities for the wider Warwickshire area to benefit from greater tourism.

Creative industries & ICT – 50+ gaming studios within South Warwickshire makes it the largest gaming cluster in the UK, employing over 2,500 people. It has attracted £5.35m investment.

Threats

Covid-19 - The pandemic and associated lockdowns have had a huge impact on businesses and people, particularly those in tourism-related industries. These industries face an unsettled future, at least in the short-term and may need support to sustain themselves or adapt to new markets.

Brexit – While many sectors have been well-prepared for the changes following Brexit, some industries exporting and importing to the EU countries have found difficulties particularly relating to VAT and customs duties, leading to a loss of customer base. Difficulties in supply-chains, particularly for businesses relying on 'just-in-time' delivery, may lead to significant impact on how goods are manufactured in the UK and EU.

Ageing population – A diminishing labour market of younger, qualified people is unattractive to younger businesses looking to grow, and larger businesses looking to renew their workforce. The social care sector was already in a fragile state prior to the Covid-19 pandemic, with unfilled posts, low pay and a rise in zero-hours contracts.

Lack of 'the right kind of space' – while there is available land and employment space across South Warwickshire, it may not be the right kind of space for the businesses looking to locate there, particularly those looking to grow-on. Proximity to other urban centres such as Coventry may enable businesses to locate outside the South Warwickshire area.

Housing affordability – Prices across the board in South Warwickshire are above English and West Midlands averages, with wages to price ratios over 9, particularly impacting lower paid workers. If affordable homes are not provided at the rates needed to sustain a younger population, particularly in the Stratford District area of South Warwickshire, it will be difficult to retain/attract the necessary working-age population to enable business growth. The continued growth in property prices above the growth in wages means increasing indebtedness for younger people, which may be hugely impactful given a housing market crash.