



The Place for Business at the Heart of England

Local Industrial and Economic Development Strategy
for Stratford-on-Avon District 2018-2031

December 2018

If you have any queries regarding this document please contact the Policy Team. If you find the text in this document difficult to read, we may be able to supply it in a format better suited to your needs.

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Contents

Executive Summary	
1. Introduction	5
1.1 Purpose of this Strategy	
1.2 Strategic context for the Strategy	
1.3 Geographic Context	
2. Economic Profile	17
2.1 Stratford-on-Avon Economy	
2.2 Economic Performance 2018	
2.3 Local Economic Profiles	
2.4 Vision, Aims and Priorities	
2.5 Summary of Objectives	
3. Key Challenges and Opportunities	32
3.1 National	
3.2 Regional	
3.3 Local	
4. Aim 1: The Best Place to Start and Grow a Business	37
4.1 Automotive	
4.2 Agricultural and Rural Enterprise	
4.3 Growing Businesses and Start-ups	
5. Aim 2: Prosperous communities and Infrastructure Upgrade	48
5.1 Culture, Tourism and Heritage	
5.2 Connectivity	
5.3 Infrastructure	
6. Aim 3: Good jobs and Greater Earning Power	56
6.1 Retail and Town Centres	
6.2 Skills	
6.3 Incomes and Jobs	
7. Delivering the strategy and Action Plan	65
7.1 Achieving the Vision and Aims	
7.2 Action Plan	
7.3 Role of Stratford-on-Avon District Council	
7.4 Key Players: Local	
7.5 Key Players: Sub-regional	
7.6 Key Players: Regional	
7.7 Monitoring and Review	
Action Plan	74
Aim 1 The best place to start and grow a business	
Aim 2 Prosperous communities	
Aim 3 Good jobs and greater earning power	

Executive Summary

Stratford-on-Avon District has a strong local economy. The UK Competiveness Index ranks the District 2nd in the West Midlands¹, but we can do better. Economic growth brings investment, which in turn, brings prosperity to our District.

This Industrial and Economic Development Strategy focusses on the issues and challenges predominantly by sector and on realistic actions that can be achieved over the next five years and ultimately up to 2031.

Challenges and issues that impact on economic activity have been identified and include:

- The impact of Brexit
- Retail Losses
- Shrinking working population
- Connectivity (broadband coverage)
- Transport Infrastructure and issues around congestion
- Housing affordability
- Low self containment- only 47% of residents actually work in the District
- Jobs and skills imbalance
- Tourism expenditure imbalance
- Energy
- Health and inclusivity

Some of the above influences are beyond the scope of Stratford-on-Avon District Council (SDC) to address however having examined the strengths and weaknesses of the local economy and the key challenges and opportunities, the following 9 priority areas have emerged:

Aim 1: The best place to start and grow a business (Business)

- Automotive
- Agriculture and Rural Enterprise
- Business Growth and Start-ups

Aim 2: Prosperous communities (Place)

- Retail and Town Centres
- Connectivity
- Infrastructure

Aim 3: Good jobs and greater earning power (People)

- Culture, Tourism and Heritage
- Skills
- Incomes and Jobs

These priority areas are then analysed in some detail to identify strengths, weaknesses, opportunities and threats and an action plan formulated which seeks to put in place pragmatic measures to attempt to address the difficulties identified for SDC, providing details of relevant partners, funding and associated risks.

Progress towards objectives will be monitored, continued relevance assessed at 2023 and a further Action Plan up to 2031 will be put in place, for example, to address any new issues that have arisen in the meantime.

¹ Source: Stratford-on-Avon Economic Review Infographics 2017

1. Introduction

1.1 Purpose of this Strategy

This strategy looks at the strengths and weaknesses of the local economy and sets out a plan for action to build on existing successes. It also sets out how SDC will work with partners and local businesses to deliver jobs and economic growth across the District through indigenous business growth, retention and new inward investment from the UK and abroad. The Strategy will guide future actions and support an inclusive approach to growth.



1.2 Strategic Context for this Strategy

1.2.1 National

There has been a shift in the focus of national policy to increasing productivity and this is reflected in the Government's Industrial Strategy, published in November 2017 which set an aspiration to create an economy that boosts productivity and earning power throughout the UK. It identified five foundations aligned to the vision for a transformed economy:

- **Ideas** – the world's most innovative economy
- **People** – good jobs and greater earning power
- **Infrastructure** – a major upgrade to the UK's infrastructure
- **Business environment** – best place to start and grow a business
- **Places** – prosperous communities across the UK

The strategy provides a policy framework against which major private and public sector investment decisions can be made. It recognises that economic growth happens in cities, towns and rural areas and acknowledges that the national framework will only be effective if it reflects and make the most of these economic opportunities and challenges.

Consequently policies should match local needs and agreeing Local Industrial Strategies that build on local strengths and deliver economic opportunities is a key action.



Discover more about the UK's Industrial Strategy @ www.gov.uk/government/topical-events/the-uks-industrial-strategy

1.2.2 Regional

West Midlands Industrial Strategy

Last year's Industrial Strategy White Paper allows combined authorities to create their own local industrial strategies. The West Midlands Local Industrial Strategy will become the long-term economic strategy for the West Midlands, guiding policy on transport infrastructure, housing, skills and innovation. So far draft sector action plans have been produced for automotive, construction, creative, life sciences, metals and materials. Also nine West Midlands opportunity spaces have been identified. Significant engagement and testing work has also been carried out. It is estimated that by April/May 2019 the first action plans will have been drafted with a launch of the Industrial Strategy proposed between August and November. It recognises that the global economy is predicated on the following 5 components:

1. **People, Skills and Employment**
2. **Ideas and Innovation**
3. **Infrastructure**
4. **Business Environment**
5. **Sectors**

West Midlands Spatial Investment and Delivery Plan

The WMCA is preparing a Spatial Investment and Delivery Plan that sets out how it will target investment to accelerate delivery and support the housing and job growth set out in existing Local Plans across the combined authority area as part of the Housing Deal for the West Midlands.

1.2.3 Sub-Regional

Coventry and Warwickshire Industrial Strategy

The CWLEP board has endorsed the development of an Industrial Strategy for Coventry and Warwickshire. To date, effort has focused on influencing the West Midlands Industrial Strategy (WMIS) and it has continued to progress a local version whilst the format and content of the WM version has been under development. However, now the format is published this can be replicated and used to highlight the Coventry and Warwickshire assets and actions which appear in the WMIS. Creation of a local version will allow for a level of supporting granularity and detail to the commitments within the WMIS, as suggested above. It will also offer a focal point for the assets and actions which are not included, but which are of specific relevance to Coventry and Warwickshire.

Coventry and Warwickshire Strategic Economic Plan

Prepared by the Coventry and Warwickshire Local Enterprise Partnership (LEP) in 2014 and updated in 2016, the Strategic Economic Plan (SEP) sets out 5 pillars or areas for targeted interventions to improve the sub-region's overall economic performance. This strategy builds on those pillars providing a local perspective to relevant sub-regional issues. The following table sets out where this strategy addresses the SEP's 5 pillars:

CWSEP Strategic Pillars	Detail	References in this Strategy
1. Unlocking our growth potential	Ensuring the availability of appropriate employment sites to allow existing businesses to grow and to attract inward investment	Para 4.3.4
2. Advanced Manufacturing and Engineering	Coventry and Warwickshire will be globally regarded as a centre of excellence with a strong and innovative business and R&D base and highly skilled flexible workforce	Paras 4.3.4, 6.2.1, 6.2.2, 6.2.5
3. Growing our SME	Building on the work of Coventry and Warwickshire Growth Hub to enable business development through providing information, diagnostics, and brokerage services and ensuring a strong support infrastructure is in place to address barriers to business growth	Paras 4.3.5, 4.3.6
4. Growing our talent	Enhancing the productivity and competitiveness of our wider base and increasing employment opportunities by supporting the development of new business start-ups, increasing business resilience and improving the skills levels of residents.	Paras 4.3.4, 4.3.6, 6.2.1, 6.2.2, 6.2.4, 6.2.5
5. Culture and Tourism	An essential element of Shakespeare's England and the wider Coventry and Warwickshire economy. Improvements to the local tourism infrastructure will help to grow the sector.	Paras 5.1.1, 5.1.5, 5.1.6



Discover more about the Strategic Economic Plan @ www.cwlep.com/sites/default/files/cw_lep_strategic_economic_plan_2016.pdf

1.2.4 Local

SDC Corporate Strategy

SDC Corporate Strategy² identifies the following priorities, to:

- *Positively embrace the Local Enterprise Partnership to influence its plans, priorities and impact upon our District.*
- *Maximise the use of National funding opportunities such as the City Deal and Regional Growth Fund to boost business opportunities in our area; Work with our partners to ensure that new development provides the necessary schools and transport infrastructure for local residents, especially the working population.*
- *Encourage new small businesses throughout the district through focused initiatives such as the provision of business incubation units.*
- *Maximise the benefit of the local tourism industry including support for the local Destination Management Organisation, Shakespeare's England.*
- *Support further development of the Broadband infrastructure across our district which will assist businesses with the connections they require.*

SDC Core Strategy

SDC's Core Strategy seeks to provide at least 35ha of additional net employment space for the period 2011 to 2031. To do this, it has allocated the following sites for employment purposes:

- South of Alcester Road, Stratford-upon-Avon (Proposal SUA.2)
- Atherstone Airfield (Proposal SUA.4)
- North of Arden Road, Alcester (Proposal ALC.3)
- Long Marston Garden Village (Proposal LMA)

In addition, the Council has allocated 19ha of land at Winyates Green Triangle and Gorcott Hill (Proposals REDD.1 and REDD.2) at Mappleborough Green to help meet the employment needs of Redditch. The Council has also identified a strategic site of 100ha at Gaydon Lighthorne Heath new settlement (Proposal GLH) to assist with growth at Jaguar Land Rover.

The Council's economic vision contained within the Core Strategy recognises both the largely rural nature of the District and the fact that its strategic location provides the opportunity for targeted inward investment. The Local Industrial and Economic Development Strategy contains complementary objectives and actions to the policies contained within the Core Strategy regarding, for example, the value of tourism; the importance of infrastructure to support development; supporting the role and function of the District's town and main rural centres; improved transport services; and ensuring a sustainable balance between employment growth and housing provision is maintained.



Discover more about the Core Strategy @ www.stratford.gov.uk/corestrategy

² 2015-2019 available at www.stratford.gov.uk/council-democracy/corporate-strategy-2015--2019.cfm

SDC Housing Strategy

The Stratford-on-Avon District Housing Strategy details how SDC and its partners will work together to ensure that more people get the opportunity to live independently in good quality housing of their choice. Partner organisations, representative groups, users of housing services and the general public helped in the creation of the document. The current Housing Strategy covers the period 2015-2020. It is anticipated that it will be replaced with a new Strategy –possibly effective from 2020.

The Housing Strategy includes the District's Homelessness Review and Strategy, as well as the Private Sector Housing Strategy. Its main 3 aims are:

1. To support communities including increasing the supply and choice of good quality affordable homes for local people.
2. To improve existing housing and help people live as independently as possible.
3. To prevent homelessness and reduce the harm caused by it.

Shakespeare's England Destination Management Plan

The tourism plan outlines the shared statement of intent of how the industry, local authorities and the Coventry and Warwickshire Local Enterprise Partnership can develop the area as a visitor destination over the next decade. It clearly articulates the roles of these different stakeholders and identifies clear actions that they will take along with the apportionment of resources. It outlines seven key areas for the development of the local visitor economy. These include developing the evidence base for information on tourism, destination and infrastructure development, market development, communication of the regional offer, product development, welcome and information, and the skills and business development.

Stratford Area Transport Strategy

The Stratford Area Transport Strategy sets out Warwickshire County Council and Stratford-on-Avon District Council's shared transport vision for Stratford-upon-Avon and the town's immediate environs providing a framework for maintaining and improving the transport network over the next 15 years. It identifies general principles that need to underlie future development of the town's transport network so that Stratford-upon-Avon can continue to thrive as a town that meets the needs of local people and as a visitor destination of international significance.



Discover more about the Transport Strategy @ www.stratford.gov.uk/infrastructure

1.3 Geographic Context

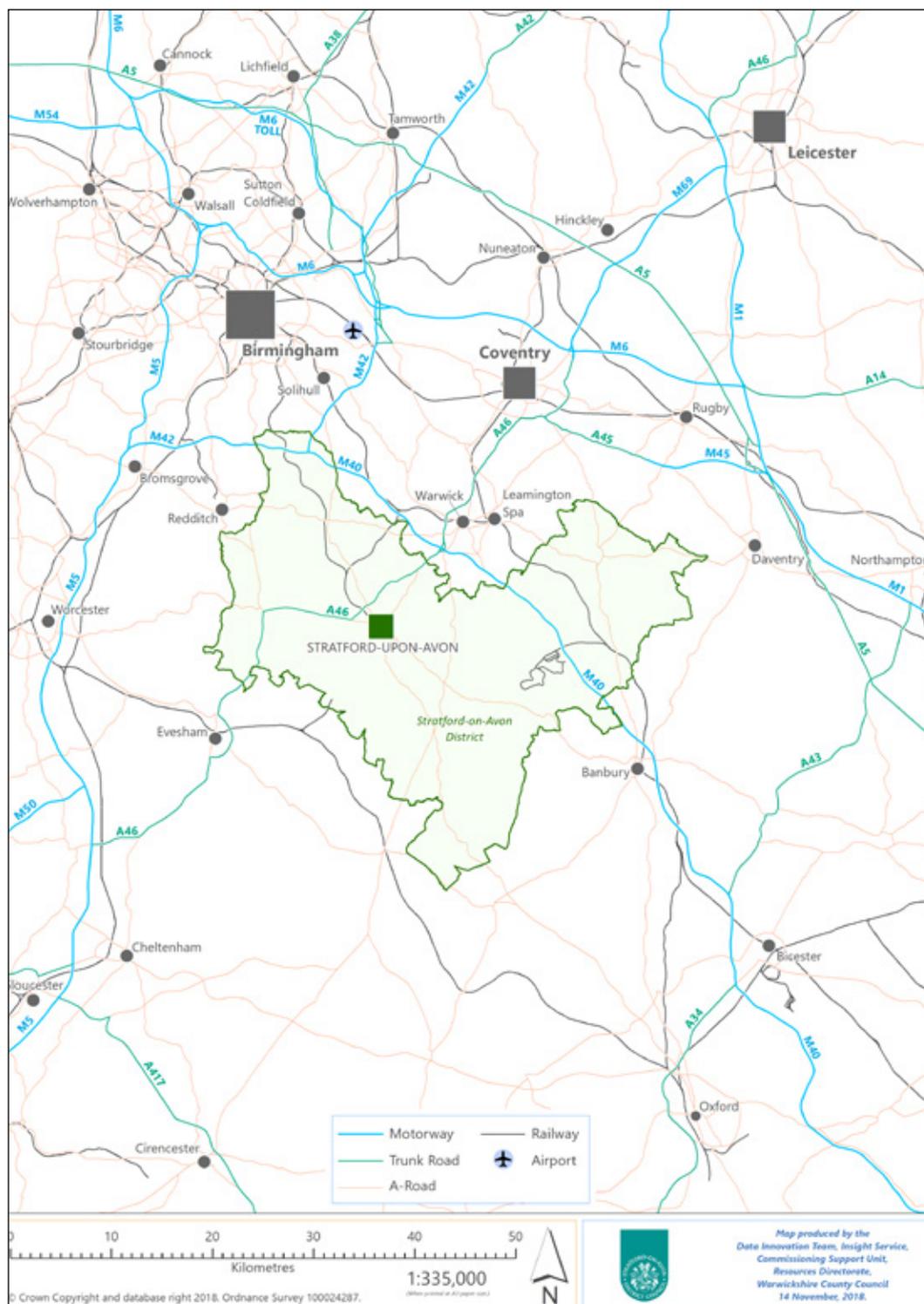
Covering 979 sq km of south Warwickshire countryside, Stratford-on-Avon District lies at the heart of England. The District is rural with a dispersed settlement pattern home to some 250 communities of varying size, from the world renowned Stratford-on-Avon (– the largest town and birthplace of William Shakespeare, through the small market towns of Alcester, Henley-in-Arden, Shipston-on-Stour and Southam, to numerous rural villages and hamlets. The north of Stratford-upon-Avon town lies within the West Midlands Green Belt whilst the southern fringes of the District are within The Cotswolds Area of Outstanding Natural Beauty (AONB). The District’s historic and natural environment is very highly valued and contributes significantly to the identity and character of the area.

Map 1: Stratford-on-Avon District - National Context



Within the West Midlands region there are a number of smaller sub-regions broadly aligned with historic county boundaries. Stratford-on-Avon District sits within the Coventry and Warwickshire sub-region. Indeed, there are important socio-economic and geographic differences between the sub-regions. For example, Coventry and Warwickshire acts as a 'gateway' between the West Midlands and the Southeast of England in contrast to the rurality of Herefordshire and Worcestershire and the regeneration challenges facing the Metropolitan authorities.

Map 2: Stratford-on-Avon District - Regional Connectivity



However, the District itself is not a single entity and this is reflected in the fact that it is covered by three Travel to Work Areas and three Housing Market Areas. These areas indicate the geographical extent of where households are generally likely to commute for employment purposes and the geographical area within which households are generally likely to consider moving house in, respectively. The majority of the District is within the Warwick and Stratford-upon-Avon Travel to Work Area whilst, broadly speaking, approximately two-thirds (central and west) of the District is within the Birmingham Housing Market Area.

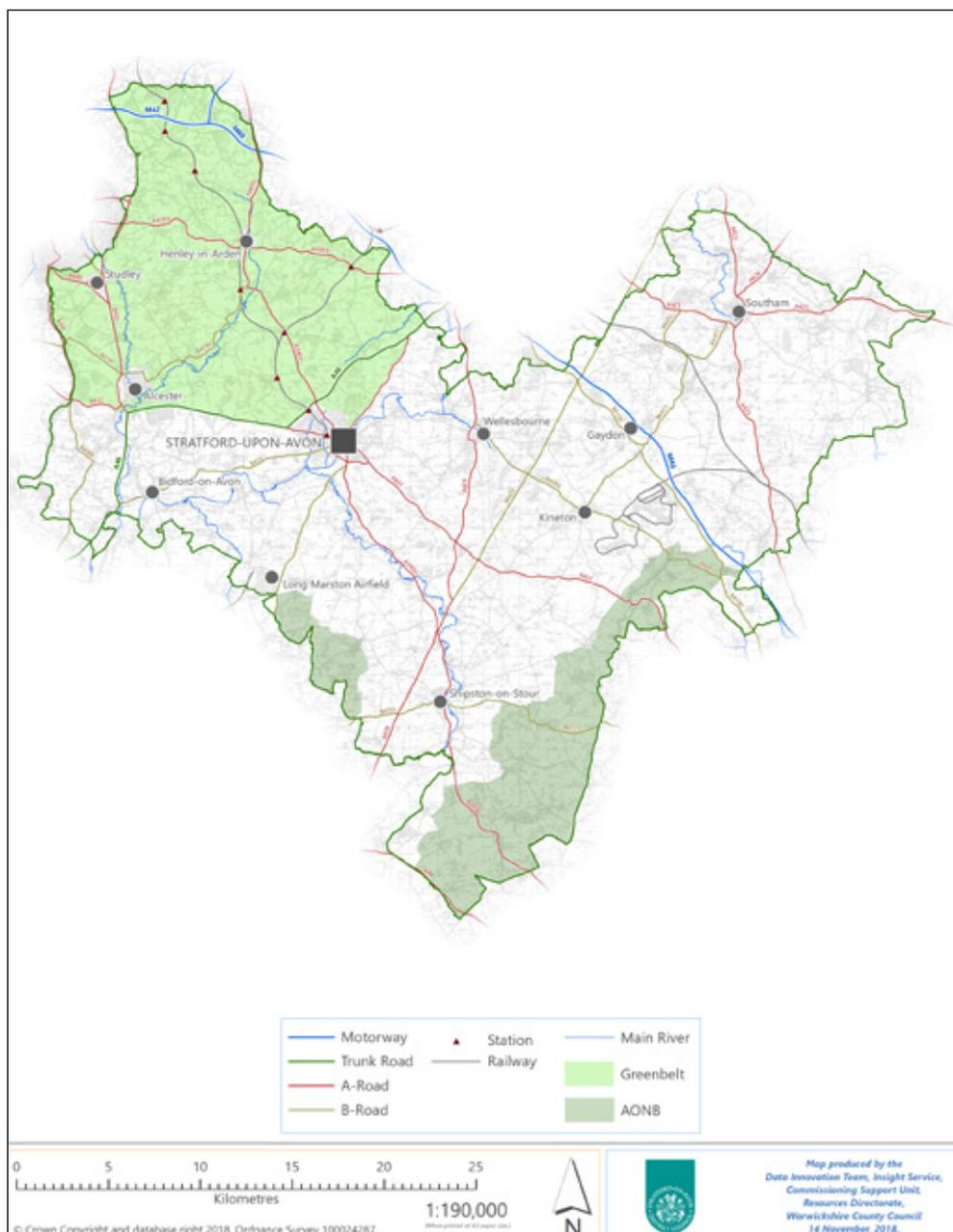
Travel to Work Areas

- Birmingham
- Warwick and Stratford-upon-Avon
- Banbury

Housing Market Areas

- Birmingham
- Coventry
- Cheltenham

Map 3: Stratford-on-Avon District - District Connectivity

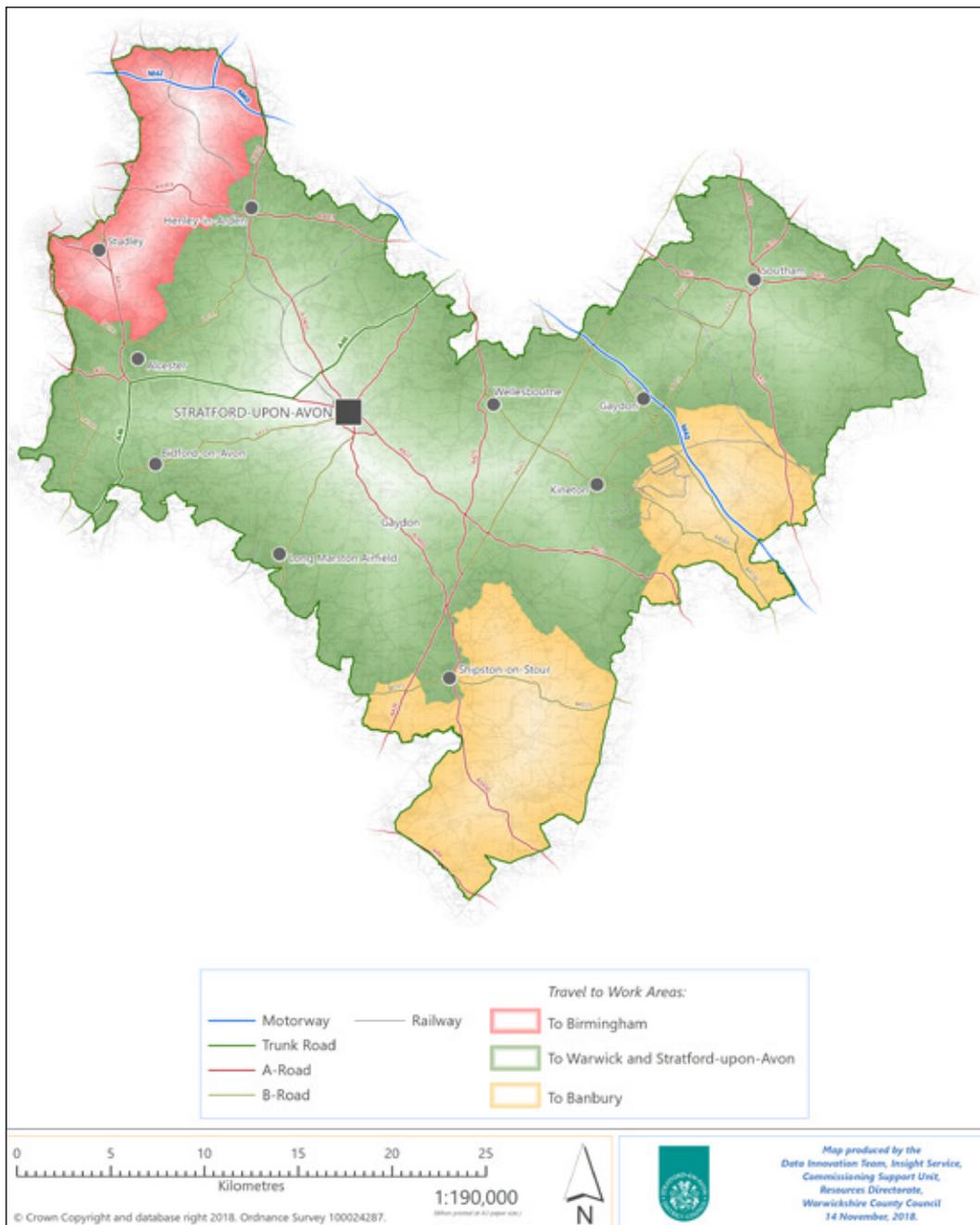


Stratford-on-Avon District is connected to London via the M40 (under 2 hours), to the East and West Midlands via the M42, and via the A46, to the M5 for access to the Southwest of England. The District is served by Birmingham International Airport as well as rail links to Birmingham and London (via Leamington) as well as between Worcester and London on the North Cotswold line. Stratford-on-Avon is also in close proximity to UK Central which is home to the National Exhibition Centre, Genting UK's new £150m Resorts World, global automotive brand Jaguar Land Rover and the planned High Speed Rail Central HS2 Interchange.



Discover more about UK Central @ www.investinukcentral.com/

Map 4: Stratford-on-Avon District - Travel to Work Areas



Stratford-on-Avon District can be considered to be the heart of England, not just in terms of its geographical location, but in respect of its proximity to other centres of growth such as:

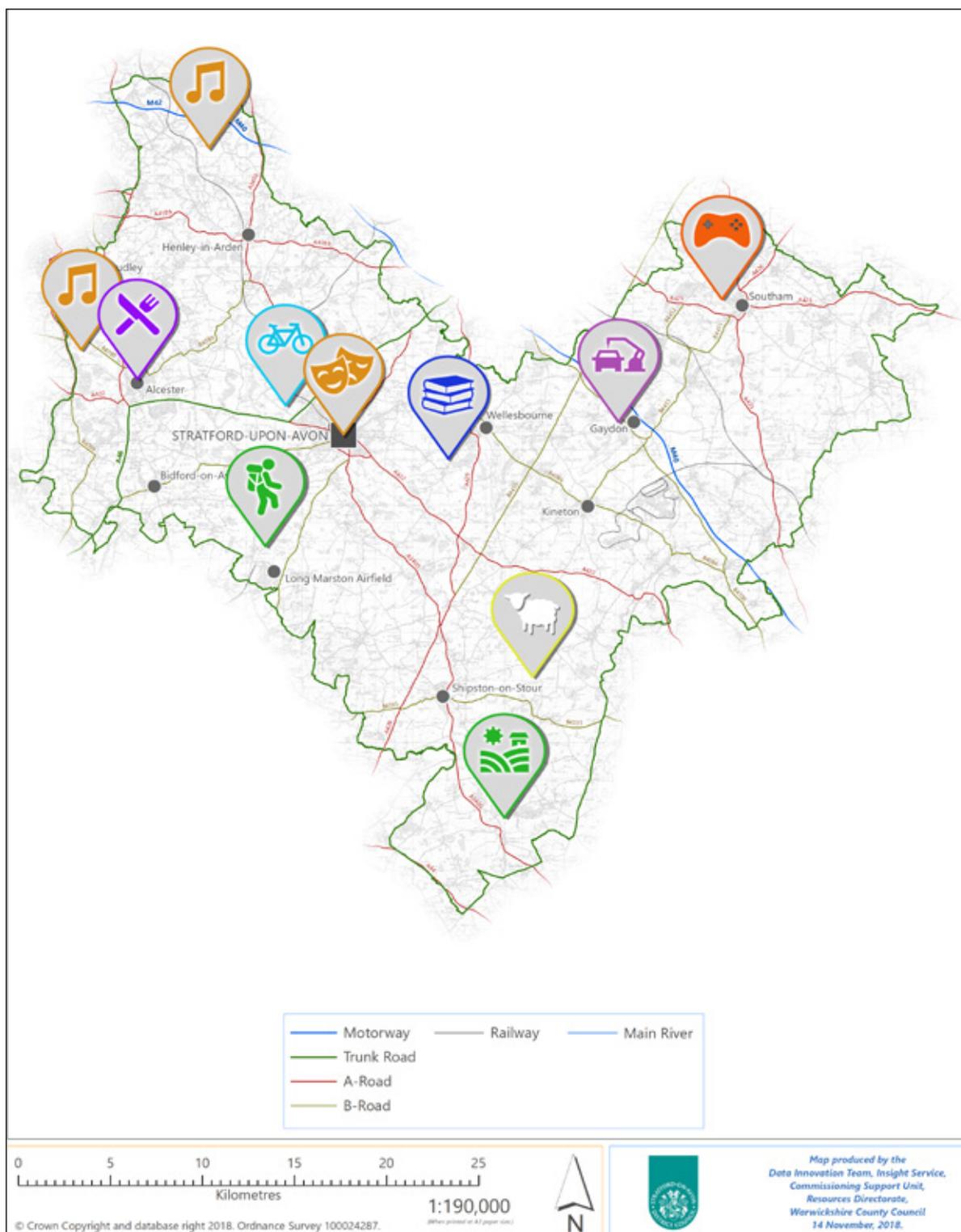
- Birmingham – the UK's second city
- Coventry – the home of the UK's automotive industry
- Worcester/Cheltenham - cybersecurity sector
- Warwick/Leamington – 'Silicon Spa' and the digital sector
- Northamptonshire – advanced automotive sector
- Oxford – UK seat of learning
- Cotswolds – tourism destination

Map 5: Stratford-on-Avon District - Regional Cultural & Business Locations



The combination of the high quality environment and strong local economy, home to international businesses such as Jaguar Land Rover, Aston Martin Lagonda, the National Farmers Union, the Royal Shakespeare Company, Codemasters and Sitel and its links to neighbouring key sectors and proximity to Birmingham International Airport and the planned HS2 station at UK Central in Solihull, provides a unique and ideal place in which to do business.

Map 6: Stratford-on-Avon District - District Cultural & Business Locations



The Midlands 'Golden Triangle' (area within M42, M1 and M6) is one of the leading areas in the UK, with high demand for space and regarded by the industry as the most optimum location in the UK. The area has key competitive advantages in advanced manufacturing and engineering (AME) and logistics.

Stratford-on-Avon also has potential for increased global trade and investment opportunities for the District's economy. This is in part demonstrated by the established and growing links with China and the global brand of Shakespeare together with exporting of global brands such as Land Rover. However there is potential to develop this further for example Warwick University has international reach through its staff, students and partnerships and would work with SDC to explore ways this asset could be developed further.



2. Economic Profile

2.1 Stratford-on-Avon District Economy

The local economy of Stratford-on-Avon District is strong and, against a number of key indicators, outperforms the county of Warwickshire as a whole.

Key Indicators		Stratford-on-Avon	Warwickshire County	Performance Gap
	Total businesses per 1,000 population	65.8	48.0	+17.8
	"LEP priority businesses" per 1,000 population	28.1	20.3	+7.8
	SMEs per 1,000 population	65.7	47.8	+17.9
	Business starts per 10,000 population	78.2	68.4	+9.8
	Employment Rate	81.3%	76.9%	+4.4%
	Jobs density	1.10	0.94	+0.16
	Proportion of employment in LEP priority sectors	41.9%	30.8%	+11.1%
GVA per head				
	<i>current (2015)</i>	£29,000.00	£27,300.00	+6.2%
	<i>forecast(2025)</i>	£34,660.00	£31,850.00	+8.8%
GVA per worker				
	<i>current (2015)</i>	£52,480.00	£49,735.00	+5.5%
	<i>forecast (2025)</i>	£63,130.00	£58,740.00	+7.5%

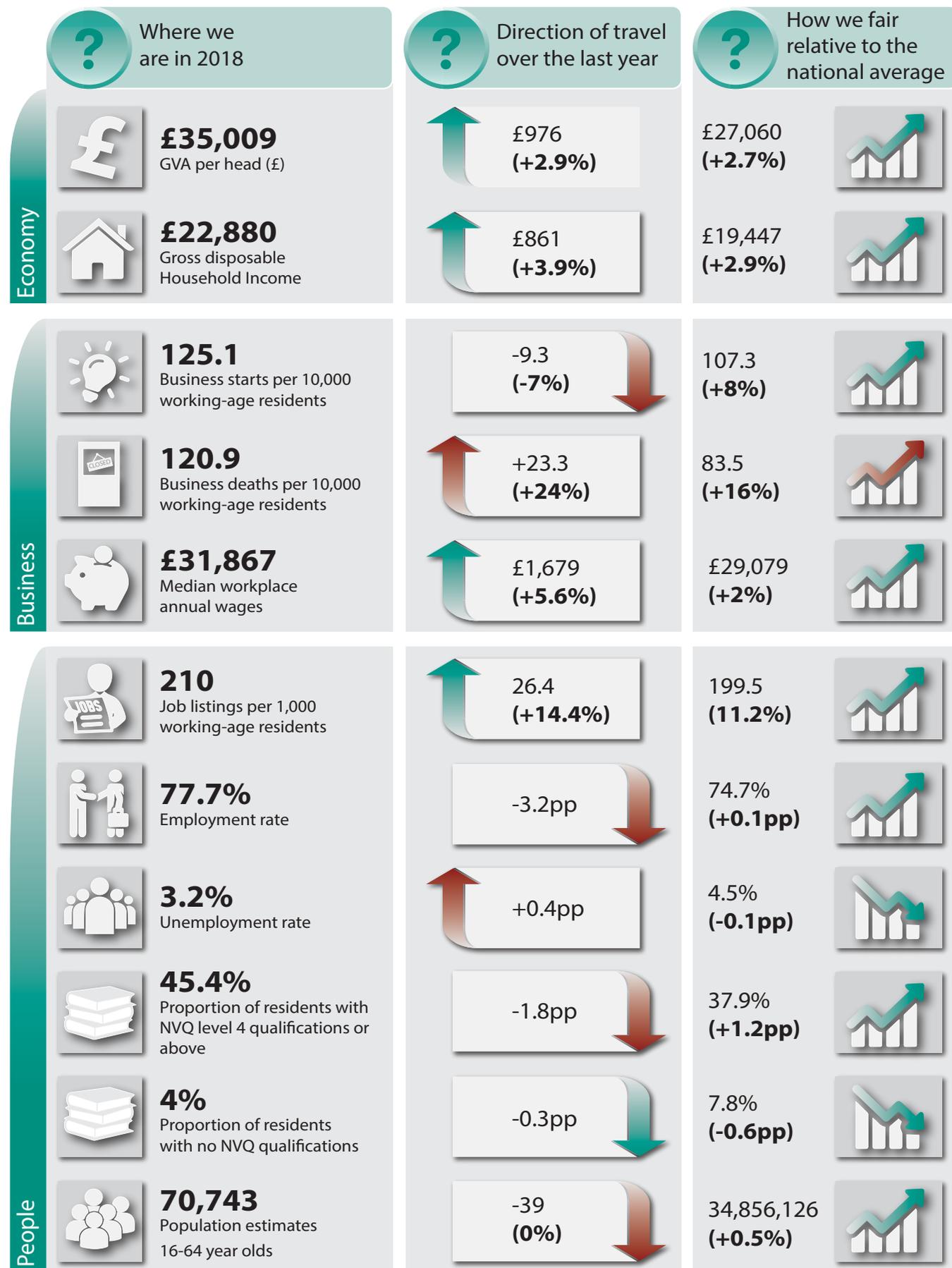
On behalf of SDC, Warwickshire County Council's Economic and Inward Investment Team undertook an assessment of the Stratford-on-Avon economy and this forms the key technical evidence underpinning this strategy.

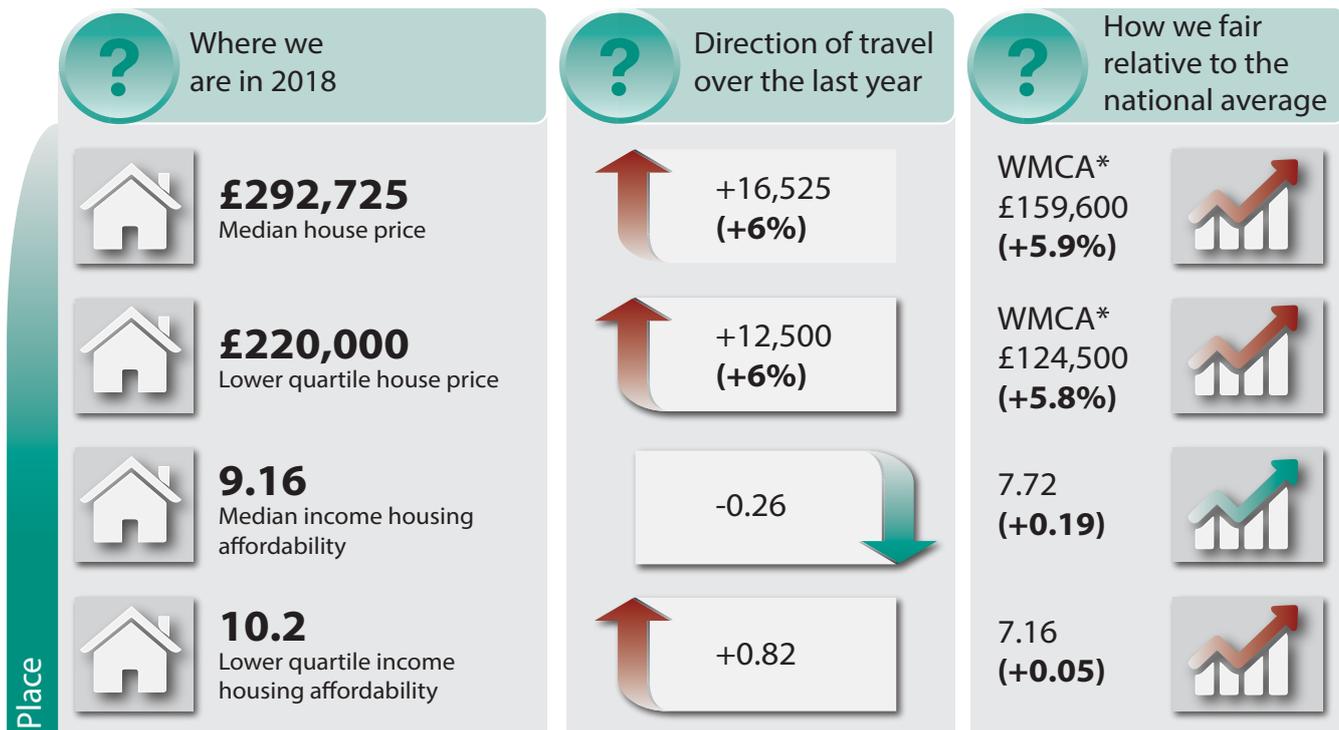


Discover more about Stratford-on-Avon District Economy @
www.warwickshire.gov.uk/economicassessment

2.2 Economic Performance 2018

The following infographics summarise the performance of the local economy as at 2018.





*These measures are compared to the West Midlands Combined Authority (WMCA)



2.3 Local Economic Profiles

The following profiles provide a 'snapshot' of the key statistics and features of economic significance for Stratford Town Centre and each of the Main Rural Centres.

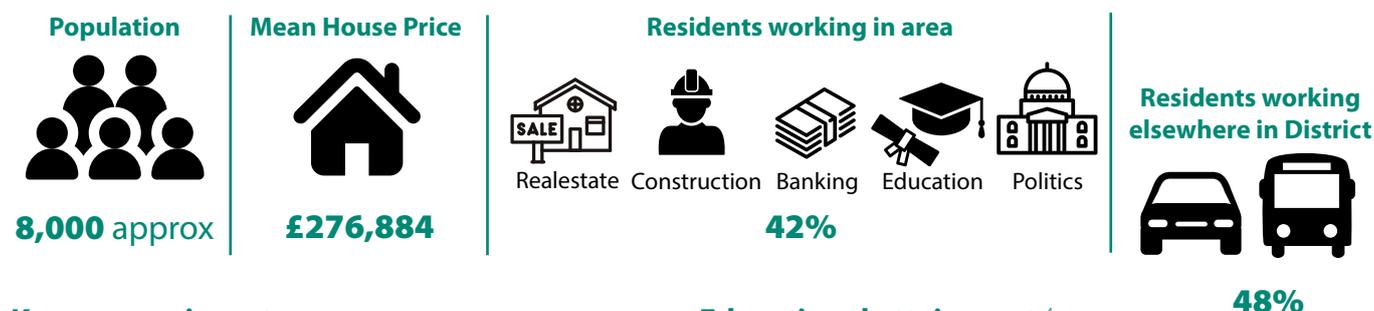


Alcester Economic Profile

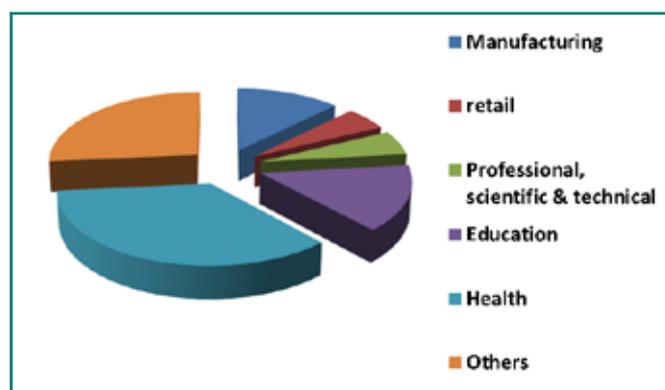
Overview

Alcester is the largest of the 8 Main Rural Centres and historic market town of roman origin. It is situated at the junction of the A46 and A435, some 7 miles west of Stratford-upon-Avon, roughly halfway between Redditch (to the north) and Evesham (to the south).

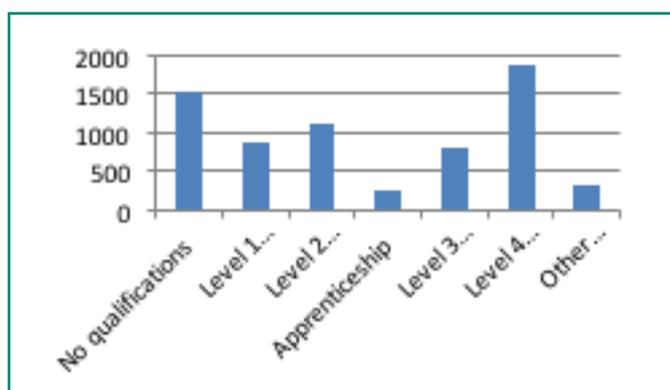
Key Facts³



Key economic sectors:



Educational attainment:⁴



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Attractive town centre with street market • Growing employment sites • Regular events including Court Leet, Mop Fair & Food Festival 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Constrained by Green Belt • Small retail catchment area
<p>Opportunities</p> <ul style="list-style-type: none"> • Heath & educational sectors • Heart of England Long Distance Path • Minerva Mill Business Centre • Additional visitor attraction based on heritage 	<p>Threats</p> <ul style="list-style-type: none"> • Flooding • Archaeological remains could constrain development

³ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

⁴ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Bidford-on-Avon Economic Profile

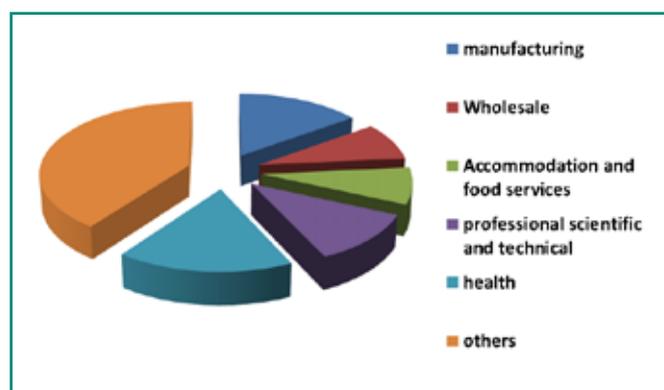
Overview

Bidford-on-Avon lies 6 miles to west of Stratford-upon-Avon and 6 miles to the north-east of Evesham. It is an attractive location on River Avon with own identity and its historic centre lying in the heart of the old village of Bidford-on-Avon.

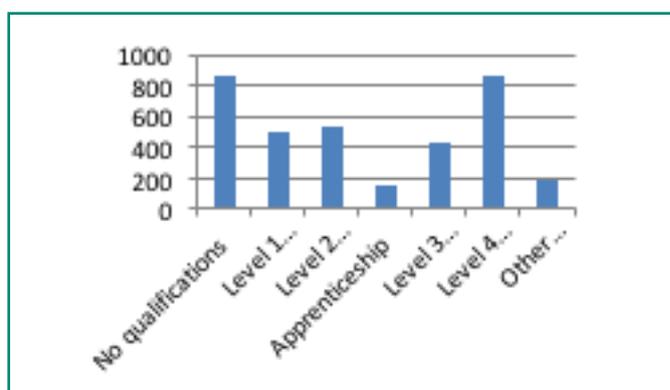
Key Facts⁵



Key economic sectors:



Educational attainment:⁶



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Attractive location on River Avon • Lies relatively close to Stratford on Avon and Evesha. • Frequent bus services serving Redditch, Evesham and Stratford-upon-Avon 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Grown quite considerably in the last decade with local concerns about impact on character • Lack of secondary school
<p>Opportunities</p> <ul style="list-style-type: none"> • Regeneration of certain parts of Waterloo Park Industrial Estate 	<p>Threats</p> <ul style="list-style-type: none"> • Capacity of local road network

⁵ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

⁶ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Henley-in-Arden Economic Profile

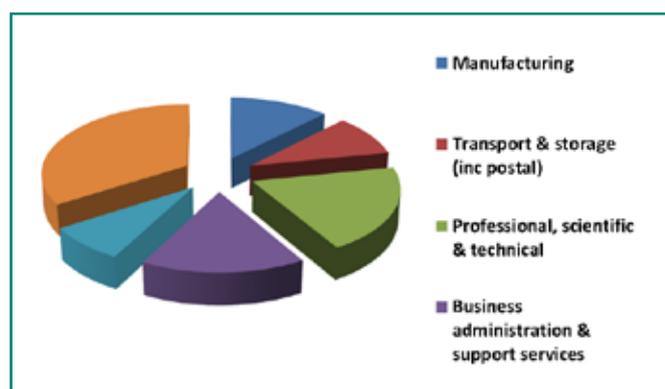
Overview

Henley-in-Arden is located 7 miles north of Stratford-upon-Avon, 8 miles west of Warwick and 18 miles south of Birmingham. Its proximity to the M40 makes it an attractive location for certain types of business. It is an interesting place to visit for both its rich history; designer shopping; refreshments, in an array of coffee shops and gastro bars, along its mile long High Street.

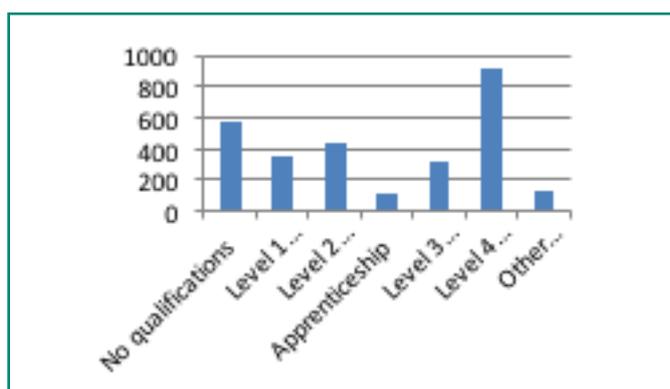
Key Facts⁷



Key economic sectors:



Educational attainment:⁸



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Henley-in-Arden railway station on line between Stratford upon Avon and Birmingham • Attractive High Street providing range of shops and services 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Presence of Ancient Monument and other features serve to limit growth
<p>Opportunities</p> <ul style="list-style-type: none"> • Need for small workspace units in the Town • Further visitor attracting festivals-Heritage festival, Arts festival etc. 	<p>Threats</p> <ul style="list-style-type: none"> • Pressures for growth due to Green Belt • Flood zone • Limited public parking

⁷ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

⁸ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Kineton Economic Profile

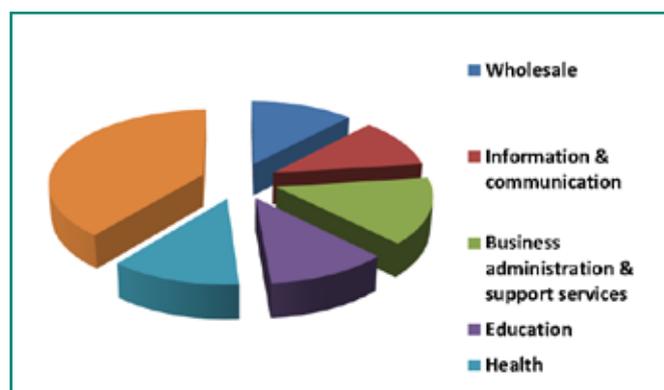
Overview

Village is located 5 miles south east of Wellesbourne, 13 miles south west of Stratford-upon-Avon and 10 miles north east of Shipston-on-Stour. The two Conservation Areas and historic Character of Kineton and Little Kineton are important features of local distinctiveness.

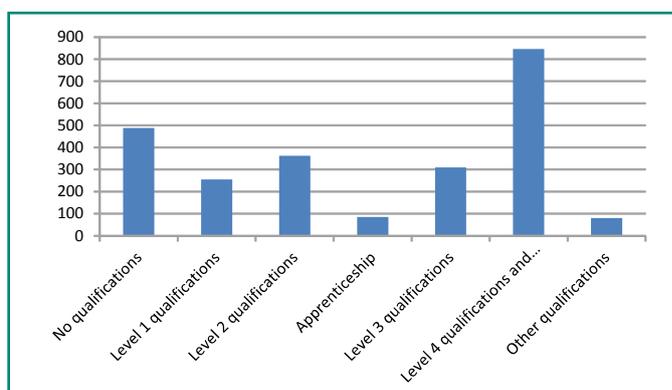
Key Facts⁹



Key economic sectors:



Educational attainment:¹⁰



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Good accessibility by car-10 minutes to junction 12 of the M40 • Two miles to the north is former RAF Gaydon which is now a vehicle testing ground and motor vehicle research and development centre for JLR and AML • Edgehill Battlefield 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of hotel accommodation in Kineton. • Public transport between Kineton and surrounding villages is limited
<p>Opportunities</p> <ul style="list-style-type: none"> • Develop tourism potential of Edgehill Battlefield ie more overnight accommodation and Restaurants/ tea shops etc 	<p>Threats</p> <ul style="list-style-type: none"> • Capacity of transport infrastructure is a key concern • Traffic congestion at peak times

⁹ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

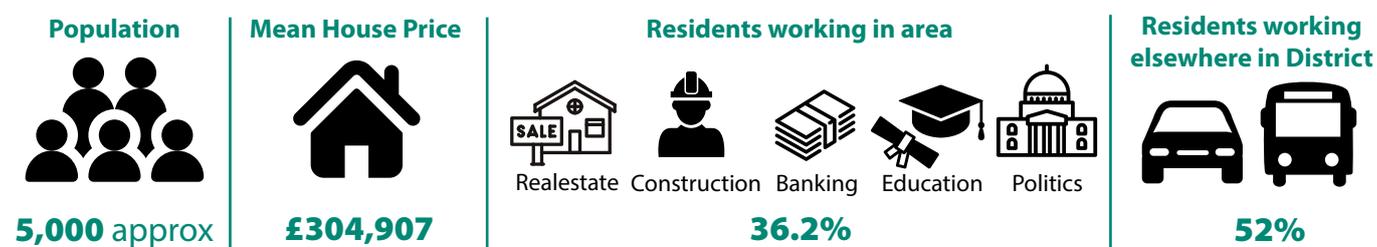
¹⁰ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Shipston-on-Stour Economic Profile

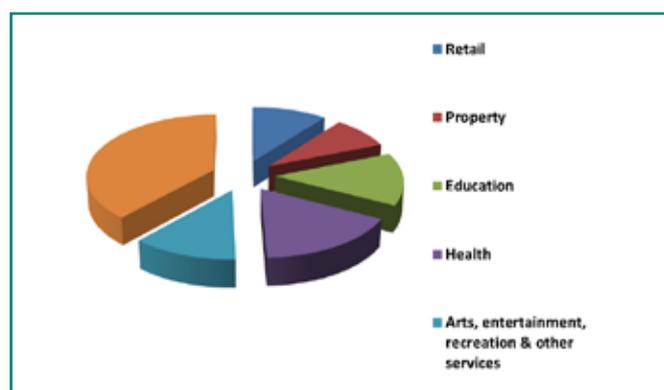
Overview

The town is located on the river Stour at the heart of the most rural part of the District, lying about 10 miles south of Stratford-upon-Avon and 14 miles to the west of Banbury. The town has a unique sense of place and character due in part to its history. It is regarded as Gateway to the Cotswolds AONB. The rural communities in southern part of District look to the town for shops and services.

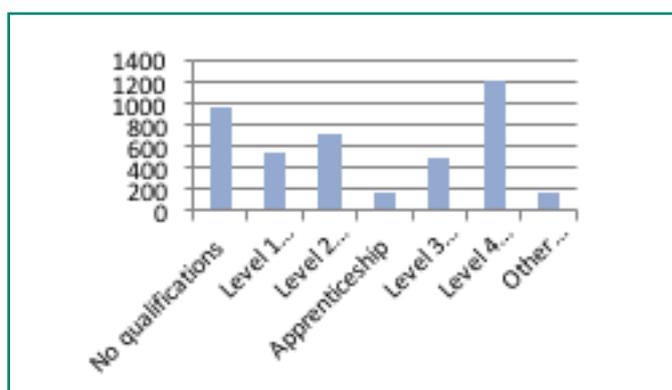
Key Facts¹¹



Key economic sectors:



Educational attainment:¹²



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Attractive town centre providing shops and services • Good quality retail parks nearby • Leisure and tourism visitors • There are varied bus services serving a variety of areas and a circular route around the town itself 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Mismatch between local jobs and rising population • Relatively remote location may not be attractive to major employers • It is remote from the motorway network
<p>Opportunities</p> <ul style="list-style-type: none"> • Additional suitable and affordable business space needs to be encouraged 	<p>Threats</p> <ul style="list-style-type: none"> • The capacity of transport infrastructure could constrain its attractiveness

¹¹ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

¹² Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Southam Economic Profile

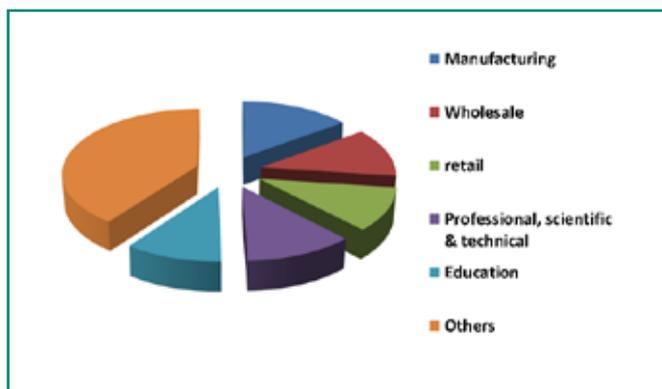
Overview

Southam is located 6.5 miles south east of Leamington Spa and 20 miles north-east of Stratford upon Avon. It functions as a service centre for eastern part of the District for everyday needs and the presence of Southam College serves to strengthen the Town’s role. It has strong historic connections, such as, the Cardall Collection and Civil War links.

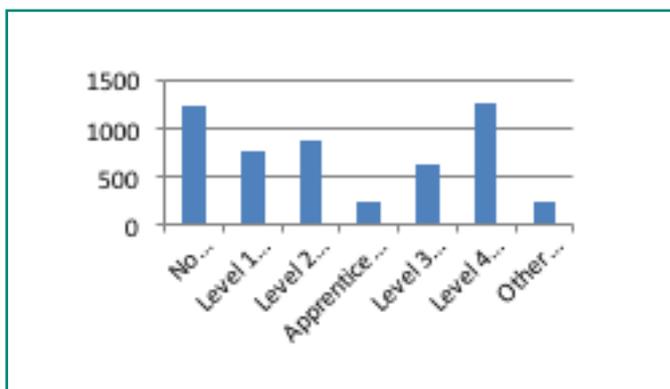
Key Facts¹³



Key economic sectors:



Educational attainment:¹⁴



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Historic connections and potential for tourism • Good connectivity for the town -public and community transport • Southam serves as a local centre for the villages around it • Close proximity to Silicon Spa 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Infrastructure capacity • Impact of HS2
<p>Opportunities</p> <ul style="list-style-type: none"> • Role of town centre needs to be strengthened • Potential to capitalise further on proximity to Silicon Spa and growth in gaming sector • Semi-redundant buildings 	<p>Threats</p> <ul style="list-style-type: none"> • Character as a rural market town needs to also be protected • Sensitive in landscape terms and constrains growth somewhat

¹³ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

¹⁴ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Stratford-upon-Avon Economic Profile

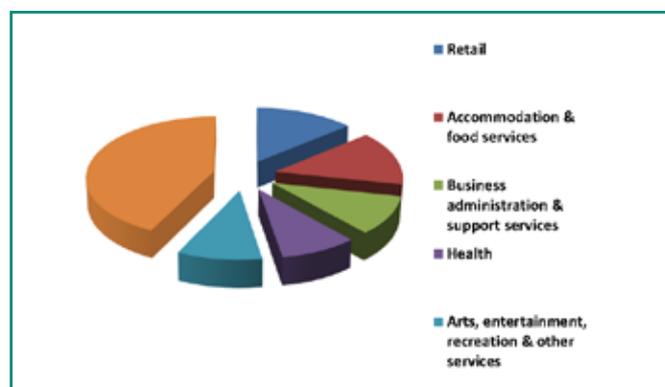
Overview

Focus for international cultural attractions including the Shakespeare properties and the Royal Shakespeare Theatre as well as being attractive for riverside and historic centre. Range of shops and services serving both visitor and residents needs.

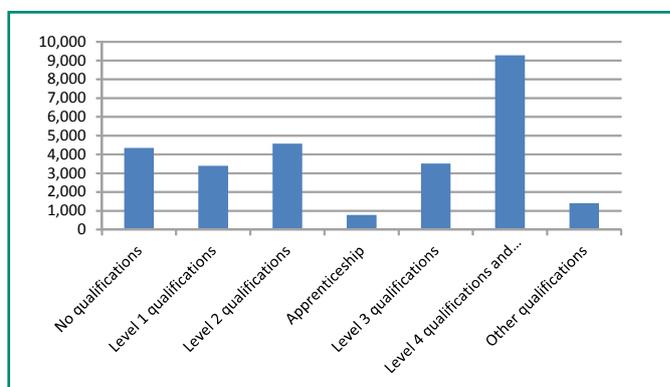
Key Facts¹⁵



Key economic sectors:



Educational attainment:¹⁶



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> Shakespeare connection and global attractor Attractive riverside and historic centre CWLEP funding to enhance visitor experience Train station and good accessibility 	<p>Weaknesses</p> <ul style="list-style-type: none"> Suffers from highway congestion at certain times Environmental impact of traffic Evening economy has declined in recent years
<p>Opportunities</p> <ul style="list-style-type: none"> More overnight stays would boost spending on tourism Opportunities for redevelopment of outworn areas such as Canal Quarter Promotion of evening economy. Encouragement of creative sector. Opportunity to increase visitor experience 	<p>Threats</p> <ul style="list-style-type: none"> Infrastructure capacity Conflicts between pedestrians and vehicles Pressure for development could potentially undermine character of Town if not sensitively managed Retail balance between town centre and edge of town retail parks Flood risk

¹⁵ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

¹⁶ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Studley Economic Profile

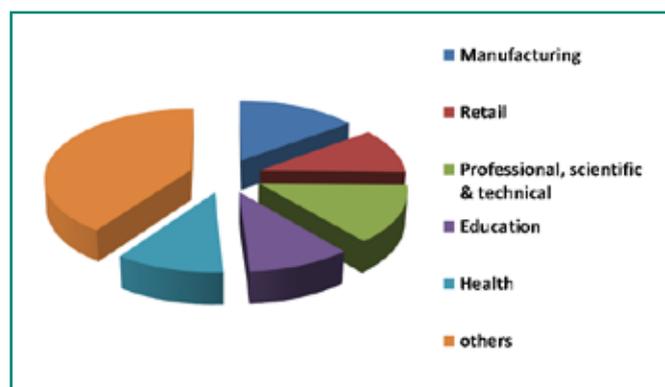
Overview

Studley is one of the largest villages. It lies in the Green Belt just south of Redditch and approximately 3 miles north of Alcester. The growth of Studley was based on development of needle industry in the 17th Century which later expanded into manufacturing fishing hooks and tackle. The landscape around Studley is very attractive and Rough Hill and Wirehill Woods to the north-west are designated as a Site of Special Scientific Interest.

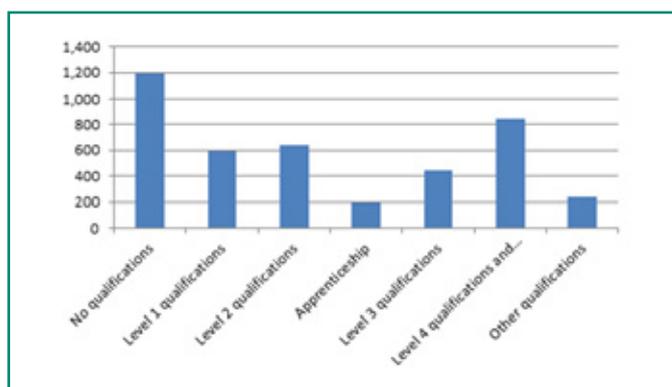
Key Facts¹⁷



Key economic sectors:



Educational attainment:¹⁸



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Good access to the M42 motorway at Junction 3 via the A435 • Bus services to Redditch, Evesham and Stratford-upon-Avon 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Role as a service centre weakened due to its proximity to Redditch and other nearby district centres • A435 passes through the village and traffic congestion and air quality is an ongoing concern including the impact of HGVs
<p>Opportunities</p> <ul style="list-style-type: none"> • Vacant brownfield sites and buildings 	<p>Threats</p> <ul style="list-style-type: none"> • Concern that retail centre is declining • Green Belt limits development

¹⁷ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

¹⁸ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

Wellesbourne Economic Profile

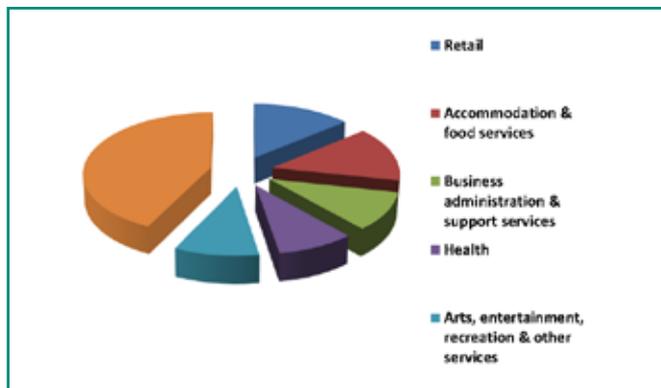
Overview

Large village on A429 located 6 miles south of Warwick and Leamington Spa and 5 miles east of Stratford-upon-Avon. River Dene flows through Wellesbourne. The Wellesbourne campus of Warwick University is a key asset. Wellesbourne Airfield is also located within area.

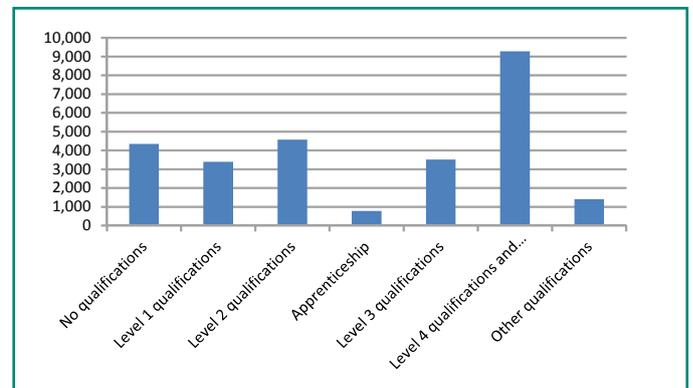
Key Facts¹⁹



Key economic sectors:



Educational attainment:²⁰



Economic Potential SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Close proximity to M40. • Proposed 'Smart City Mobility Centre' 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Wellesbourne has a limited catchment area due to proximity to Warwick, Leamington Spa and Stratford-upon-Avon • Lack of secondary school
<p>Opportunities</p> <ul style="list-style-type: none"> • Wellesbourne Airfield • Wellesbourne Campus for Warwick University 	<p>Threats</p> <ul style="list-style-type: none"> • The capacity of transport infrastructure including roads and public transport is a concern for residents

¹⁹ Left to right: Population (mid year 2017 projections ONS); Mean House price 2018 (WCC); % of residents of working age employed in the town/MRC (Business Register Employment survey WCC); % of residents who work elsewhere in the District (Business Register Employment survey WCC).

²⁰ Qualifications are based on the highest level of qualification that an individual has obtained, not including all qualifications beneath it. Qualifications data is based on 2011 census data and therefore based on all the usual residents that are aged 16 and over.

2.4 Vision, Aims and Priorities

The overarching vision of this strategy is to:

“To ensure that Stratford-on-Avon embraces all opportunities for economic growth and that resulting prosperity is inclusive and maintains the attractiveness of the District for future generations to enjoy”

Aligning with the emerging Coventry and Warwickshire Local Industrial Strategy and the UK Industrial Strategy, 3 overarching aims are identified:

- 1. Business – the best place to start and grow a business*
- 2. Place - prosperous communities and infrastructure upgrade*
- 3. People – encourage innovation, good jobs and greater earning power*

Having examined the strengths and weaknesses of the local economy and the key challenges and opportunities, the following 9 priority areas emerge (arranged by aim):

Aim 1: Business

- Automotive
- Agriculture and Rural Enterprise
- Business Growth and Start-ups

Aim 2: Place

- Retail and Town Centres
- Connectivity
- Infrastructure

Aim 3: People

- Culture, Tourism and Heritage
- Skills
- Incomes and Jobs

Chapters 4, 5 and 6 of this strategy set out how each aim will be delivered identifying:

- *Where we are now*
- *Case Study*
- *Analysis (Strengths, Weaknesses, Opportunity, Threats)*
- *Where we want to be in 2023*
- *What we've achieved so far*
- *What else we need to do to get there?*
- *Key Objectives*

Chapters 4, 5 and 6 conclude with text setting out a summary of the relationship with the WMCA Industrial Strategy.

Chapter 7 sets out an action plan identifying specific tasks or actions required to fulfil each key objective. It is acknowledged that there are a wide breadth of issues and challenges to be addressed and the action plan seeks to target actions that will make a difference.

2.5 Summary of Objectives

Whilst the key objectives have been structured around the three aims, it is acknowledged that in reality they are multi-faceted and relate to more than one aim. The matrix below shows the interrelationships between the objectives and aims.

Objectives	1. Business	2. Place	3. People
1. To address polarisation of the workforce	✓		✓
2. To improve broadband connectivity	✓	✓	✓
3. To improve access to finance	✓	✓	✓
4. To enhance the High Streets	✓	✓	✓
5. To address highway congestion and transport infrastructure	✓	✓	
6. To improve energy supply	✓	✓	✓
7. To address affordability of homes		✓	✓
8. To address skills shortages	✓		✓
9. To focus on service sector employment	✓		✓
10. To support and strengthen the rural economy ²¹	✓	✓	✓
11. To ensure all residents feel the benefits of rising prosperity	✓		✓
12. Encourage business growth in new sectors- growing high quality, high value jobs within growing sectors of the future	✓		✓

Please note: the numbering of the objectives is for reference only and does not indicate prioritisation.



²¹ Rural economy- increasing economic growth in the countryside by building on its natural assets.

3. Key Challenges and Opportunities

Notwithstanding the above, the strength of the local economy perhaps masks some more fundamental issues. SDC cannot rest on its laurels and standing still is akin to decline. This strategy seeks to not only support economic growth but also to achieve even greater prosperity.

3.1 National

3.1.1 Brexit

The impact of Brexit on the UK economy has been widely commented upon, with perhaps the biggest impact locally being on the tourism (including hospitality) sector. Although there has been no local study undertaken, following the referendum result, the Tourism Alliance undertook an Impact Survey which showed that around 15% of domestic businesses experienced a reduction in trade when compared to the previous year, with over 60% remaining the same and 17% showing an increase²². The same survey revealed that 28% of inbound Tourism businesses indicated that they had been adversely affected by referendum result and 62% of inbound businesses foresaw an increase in costs. However, UKinbound²³ reported that 44% of its members indicated that business had increased and that 63% of EU visitors stated that the referendum result would not affect their willingness to visit the UK. The study highlighted other issues which impacted on visitor numbers and included; security concerns, connectivity and accommodation. The number of overseas visitors to the UK has been steadily increasing and in 2016 amounted to 36.7 million. The value of tourism to the UK is predicted to grow to £257.4 billion by 2025.

The District's economy will also be sensitive to uncertainty around Brexit and this could affect other sectors such as agriculture, horticulture²⁴ and manufacturing. Actions will therefore need to be taken with businesses and educational institutions to address potential skill gaps.

3.1.2 Retail Losses

Like the rest of the UK, Stratford-on-Avon's high streets are facing an uncertain future with strong competition from internet retailers. Whilst Stratford-upon-Avon town may fare better than others, given the influx of tourists and the type of shops, the nature of shopping will undoubtedly change. High streets and town centres also play an important role in maintaining vibrant communities; empty shops can lead to a spiral of decline. The Retail trade sector employs the second largest proportion of Stratford's workforce. Half of those are employed in 'Non-specialised stores with food and beverages', which will predominantly serve the tourism industry. Due to demand from the tourism industry, Stratford has the largest proportion of jobs in low-paid sectors in Warwickshire. This is down to the retail and accommodation sectors typically paying below average wages.

²² www.tourismalliance.com/downloads/TA_392_417.pdf

²³ (the trade association dedicated to the UK's inbound tourism industry)

²⁴ Horticulture may be defined as "The cultivation, processing, and sale of fruits, nuts, vegetables, ornamental plants, and flowers as well as many additional services".

3.1.3 Shrinking Working Population

The working population represents 58.18% of the total population, shrinking 2.6% since 2012; this is the smallest proportion of 16-64 year olds in the county and has shrunk the most, double the UK average (1.3%). The proportion of young workers (16-24) represents 8.45% of the population; lower than the UK (11.35%) and Warwickshire (10.42%). This proportion has fallen 0.8% since 2012, less than the county and national averages. Those over 65 represent 25.16% of the population, the highest in the county and much higher than the UK average (17.83%). This has grown 7.4% since 2012, a faster rate than the rest of the county (6.5%) and the UK (4.8%). This could be due in part to the increase in the state pension age.



3.2 Regional

3.2.1 Connectivity

Lack of superfast broadband to business premises is severely impacting the ability of businesses in Stratford-on-Avon to compete in the global marketplace. Furthermore, the ability of residents to apply for jobs, undertake training and to enjoy the benefits of more flexible working is also stifled by the lack of superfast broadband meaning that Stratford-on-Avon struggles to compete with more urban and better connected areas. This is a particular concern given the entrepreneurial nature of the local economy and potentially a missed opportunity given the proximity of the District to Silicon Spa.

3.2.2 Transport Infrastructure

Transport infrastructure and accessibility is essential to a productive economy. Not only does it allow goods and services to be imported and exported at low cost but allows employees to travel to and from work efficiently and effectively. Traffic congestion costs the UK economy £4.3bn per year²⁵. The Town itself experiences severe congestion at certain times due in part to the influx of visitors. Being a rural District with historic towns and villages Stratford-on-Avon also faces the twin challenges of how best to accommodate the car within the historic environment and provide effective and efficient public transport.

3.2.3 UK City of Culture 2021

Coventry has won the title of UK City of Culture for 2021. As well as additional grant funding, the city of culture status gives leverage and access to other pots of money, public and private and can generate significant additional investment. Given Stratford-on-Avon's proximity to Coventry, but more importantly, the Districts cultural heritage, there is a huge opportunity to 'piggy-back' on Coventry's success.



Discover more about Coventry 2021 @ www.coventry2021.co.uk

3.2.4 2022 Commonwealth Games

The announcement that Birmingham will be hosting the 2022 Commonwealth Games could be worth £1.1bn to the UK economy, with half invested in the West Midlands. It will support an average 4,526 jobs in Birmingham each year until 2022 as well as see training opportunities in areas like construction, engineering, sport and tourism²⁶. Again, given the proximity to Birmingham, there is a huge opportunity for Stratford-on-Avon District to benefit from Birmingham's successful bid to host the Commonwealth Games.



Discover more about Birmingham 2022 @ www.birmingham2022.com

²⁵ www.telegraph.co.uk/finance/newsbysector/transport/9734126/Traffic-congestion-costs-UK-economy-4.3bn-a-year.html

²⁶ www.birminghammail.co.uk/news/midlands-news/jobs-commonwealth-games-birmingham-money-14012749

3.3 Local

3.3.1 Housing Affordability

Average house prices in Stratford-on-Avon are the highest in Warwickshire and have increased £16,500 to £285,000 over the last year; a 6% rise. The average house in Stratford-on-Avon District is now £65,000 more expensive than the national average. The district has the worst affordability ratio in the county and is in the top 25% least affordable places outside of London. Since 2012, house prices in the area have increased 20%; only 5% less than the four years prior to the housing market crash in 2009, raising fears of housing “bubble”.

3.3.2 Low Self-Containment

Stratford-on-Avon has low job self-containment with only 47% of residents actually working in the District (this is lower than Nuneaton and Warwick). Strongest out-commuting flows are to Warwick (13%), Birmingham (5%) and Coventry (4%). Positive net in-commuting flow (2,815) driven by commuters from Worcestershire. Strong in-commuting flows from Warwick, Redditch and Wychavon. The combination of high house prices and low wages in certain key sectors means that many of those who work in the District do not live in the District. Whilst no doubt many low paid workers live in neighbouring towns just outside the District, many will commute longer distances. Apart from the impacts on traffic congestion (owing to the relatively limited and expensive public transport services), it is economically unsustainable providing little economic resilience for the District.

3.3.3 Jobs and Skills Imbalance

There is a mismatch between supply and demand of skills in the area. In the 2017 Quarterly Economic Survey, 1 in 3 businesses reported a skills shortage as their biggest barrier to growth. Matching the skills demanded by businesses with those supplied by schools should reduce unemployment, out-commuting and business death rates. Now, more than ever, we require the efficient use of labour to promote improvements in competition and productivity. Skills shortages in business are recognised as a major barrier to growth, despite the high level of NVQ4+ qualifications in the District.

3.3.4 Tourism Expenditure Imbalance

Stratford-on-Avon’s tourism sector is estimated to be worth around £385m a year to the local economy. The sector also directly supports approximately 7,400 workers, 21% more than the national average for an area of Stratford’s size. However, productivity in the local tourism sector is behind its UK equivalent. Each worker in the sector produces around £35,300 worth of goods, compared to £36,875 nationwide. If the Stratford-on-Avon tourism industry was as productive as the UK one, the economy would be £11.6m better off a year.²⁷ This has however been improving more recently, which is very positive and can be built on. Productivity within the tourism sector is below average, so there are opportunities to strengthen the sector by focussing on improving productivity levels (through investment and upskilling).

²⁷ Stratford-on-Avon Economic Assessment Full Report December 2017

3.3.5 SME/start up/growth

Stratford-on-Avon's high competitiveness ranking is reflected in the number of businesses in the area. There are 115 businesses per 1,000 working-age population, 67% greater than Warwickshire, double the WMCA density and significantly higher than the rest of England (67). The level of business births and deaths per 10,000 working-age population is higher than county, regional and national averages. The current business market is highly saturated and very competitive. Nevertheless, those businesses that do set-up, are more likely to be successful. The 5-year survival rate is 45.2% in the area, compared to 42.1% in Warwickshire, 40.3% in WMCA and 41.4% nationwide.

The competitive business environment is, however, making it relatively more difficult to start a business. Start-ups per 100 existing business is 12.1, compared to 13.9 across Warwickshire, 15.4 in the WMCA area and 14.7 nationwide. The pool of businesses in 2010 has increased by 50%, lower than Warwickshire (63%), the WMCA (76%) and England (66%). Indeed, the two key measures of competitiveness, the business density and business births per 10,000 working-age residents, have increased at a lower rate than the rest of the England. Therefore, although the business market is relatively competitive in Stratford-on-Avon, the difficulty in starting a business means the competitiveness gap is decreasing between the district and the rest of the country. The UK Competitiveness Index 2010 ranked Stratford-on-Avon as 54th, a higher position than it is today.

3.3.6 Energy

With the digitalisation of the economy, the demand for electricity is increasing significantly. Business leaders have raised concern about the adequacy of power supply across the sub-region and the impact lack of power is having on economic growth. There is a particular concern locally given the transition of the automotive sector to electric vehicles, notwithstanding the additional significant demand that electric vehicle charging points will add to the electricity demand. The Government's Industrial Strategy published in 2017 sets out how the move to cleaner economic growth – through low-carbon technologies and the efficient use of resources – is one of the greatest industrial opportunities of our time. "A key part of any local authority strategy to encourage economic growth and improve energy security should be to help reduce the costs of buying in energy – by identifying renewable and local sources of energy, and also by reducing the amount of energy used".



4. Aim 1: The Best Place to Start and Grow a Business

Stratford-on-Avon has a strong local economy being ranked second in the West Midlands on the UK Competitive Index, witnessing a 46.3% growth in the economy since the recession. Stratford-on-Avon has a higher than average number of business starts per 10,000 population and the District Council wishes to maintain and harness that entrepreneurial spirit. However, at the same time the average business size has fallen leading to greater dependency on a smaller number of larger firms and perhaps stagnation in growth, as business start-ups are unable to move forward and reach their economic potential. This strategy therefore seeks to ensure Stratford-on-Avon is the best place to start and grow a business in Warwickshire.

4.1 Automotive

4.1.1 Where we are now

The automotive industry has been the largest contributor to the increase in the value of Stratford-on-Avon's economy since the economic downturn. It has expanded fivefold (526%), compared to a modest 77% across the UK, and has, therefore, contributed to just under half of the £1.25bn increase in total output in the district. It is estimated that without the growth in this sector since the recession, the economy would have been 19% smaller and grown slower than the national average.

The automotive industry now produces approximately £713m worth of goods a year, up from £114m in 2009 and equivalent to just under a fifth of Stratford-on-Avon's total output. It also employs 8,750 people which, given the size of the district, is 45 times greater than its proportional amount. As a result, the industry adds 15.4% to the value of the West Midlands automotive sector, much higher than the total contribution across all sectors to the WMCA economy (4.5%). The local automotive sector also employs 1 in 5 workers in the UK's largest automotive cluster (BEIS, Industrial Strategy 2017), and has helped make Coventry and Warwickshire the largest exporting LEP outside of London.

More than 9 in 10 workers in the automotive sector are employed in Gaydon, where Jaguar Land Rover and Aston Martin Lagonda are based, which is also where the majority of the new jobs have been created. Around 70% of all additional employment has come from the manufacture of motor vehicle sector over the last six years. The industry has paved the way for faster-than-average job growth in the district; there are 66,000 employee jobs in Stratford-on-Avon, 9,255 more than in 2010, which is an increase of 16.3%. This is higher than Warwickshire (12.8%), the West Midlands Combined Authority (WMCA) area (9.6%), and England (10.6%).²⁸

The proportion of automotive employees with a degree level qualification (NVQ4+) is almost double the national average, amounting to 1 in 4 workers. Adding the number of NVQ level 3 workers, the proportion of at least A-level qualified workers in the automotive sector is 59.3%, higher than the national average (56.1%). Better skills are also rewarded with higher pay, and those employed in the local automotive sector earn, on average, £53,450. This is 16% higher than they would elsewhere in this industry.

Understanding labour market risks and future-proofing the workforce – A larger-than-average proportion of workers are at high risk of automation for example, in relation to the development of electric vehicles/ultra-low carbon vehicles. With forecasts expecting employment in the automotive sector to shrink to 69% of its current size by 2037, as many as 2,500 workers may need to be redeployed²⁹.

²⁸ Source: Warwickshire Economics Stratford-on-Avon Economic Assessment December 2017

²⁹ Stratford-on-Avon Economic Assessment Full Report December 2017

4.1.2 Case Studies

Jaguar Land Rover (JLR)

The principal activity of Jaguar Land Rover Limited is the design, development, manufacture and sale of vehicles bearing the Jaguar and Land Rover marques

Turnover as of May 2017 was £24,300m

It sold a total of 604,009 vehicles during 2017, comprising 431,161 Land Rover vehicles and 172,848 Jaguar vehicles.

Aston Martin Lagonda

Aston Martin Lagonda Ltd. designs and manufactures high performance automobiles. Globally they have 176 offices and employ nearly 19,000 people. Gross profit in 2016 was £194.2 m

4.1.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Contributed to just under half of the £1.25bn increase in total output in the district • Produces £713m worth of goods a year, up from £114m in 2009 • Employs 8,750 people • Industry adds 15.4% to the value of the West Midlands automotive sector • Around 70% of all additional employment has come from the manufacture of motor vehicle sector over the last six years • Generated 9,255 more employees than in 2010 • Automotive employees with a degree level qualification (NVQ4+) is almost double the national average 	<p>Weaknesses</p> <ul style="list-style-type: none"> • A larger-than-average proportion of workers are at high risk of automation
<p>Opportunities</p> <ul style="list-style-type: none"> • Understanding labour market risks and future-proofing the workforce • Potential for UK Research and Development hub at JLR/AML • Investigate the opportunities that automation may present to increase job growth 	<p>Threats</p> <ul style="list-style-type: none"> • Threat of redeployment of workers due to automation in the future • Over-reliance by many businesses in supply chain of a limited number of companies

4.1.4 Where we would like to be in 2023

- Ensure the automotive industry continues to flourish within the District.
- Continue to manage traffic flows and avoid congestion.
- To fully understand labour market risks and to have future-proofed the workforce.

4.1.5 What we've achieved so far

WCC have recently published a report on The Risk of Automation in Warwickshire March 2018. It recommends that to ensure that the benefits of automation are realised, whilst minimising the losses, policy makers require a cohesive and proactive approach that can deal with rapid improvements in technology. For this reason, five policy recommendations are set out that can ensure a socially optimal outcome;

1. retraining and continuous learning,
2. support co-investment by businesses in technology and skills,
3. attracting highly skilled, knowledge intensive occupations,
4. embedding skills for the future within education and training programmes,
5. recognising and promoting multiple careers.

4.1.6 What else we need to do to get there

- To carry out research to understand labour market risks in order to future-proof the workforce.
- To continue discussions with industry leaders to understand issues and ascertain where SDC can assist.
- Continue to assist in new business formation, indigenous business expansion and making the District attractive to inward investment by various means, such as, improving connectivity, securing attractive residential development.

4.1.7 Key Objectives

5. To address highway congestion and transport infrastructure
8. To address skills shortages

How does this fit with the West Midlands emerging Industrial Strategy?

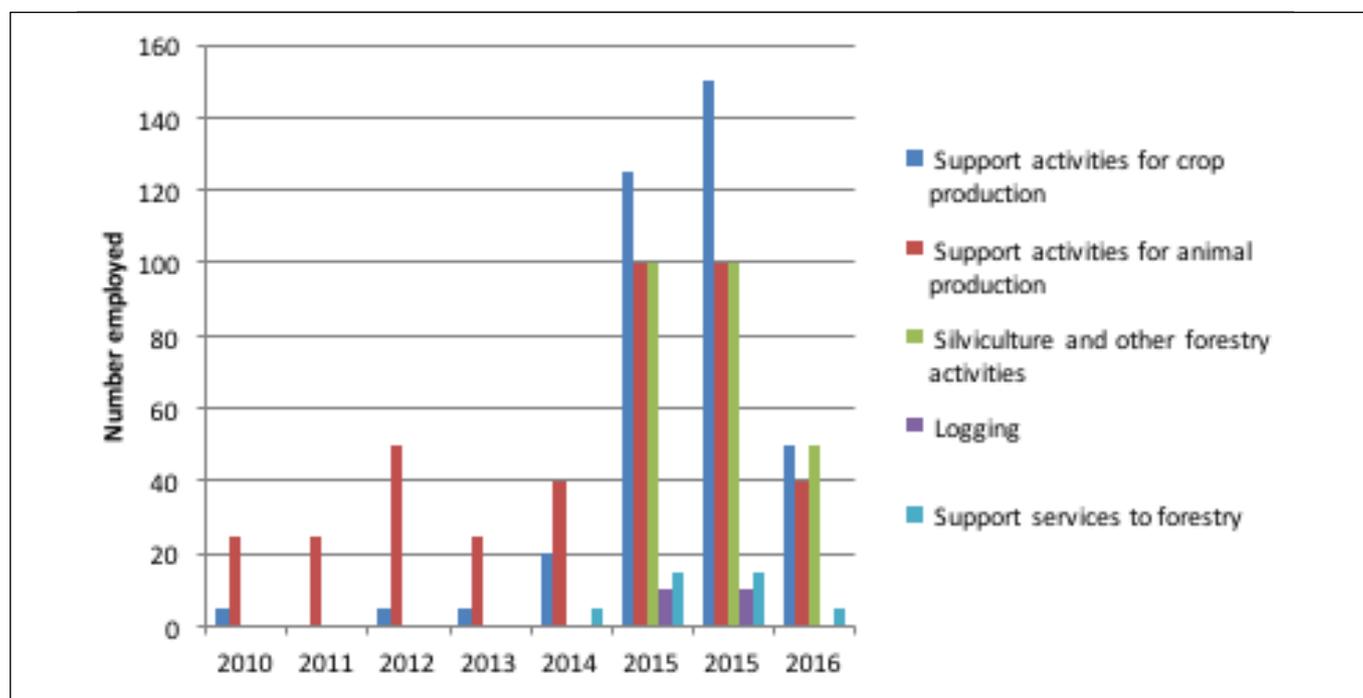
5. Sectors

The West Midlands Industrial Strategy recognises that the West Midlands produces one third of the nearly two million vehicles manufactured in the UK and one fifth of the UK's motor vehicle parts and accessories businesses are located here. It recognises that there are significant existing strengths and innovative capacity in Powertrain and battery propulsion, Connected & Autonomous Vehicles and Prototyping and product development.

4.2 Agriculture and Rural Enterprise

4.2.1 Where we are now

Much of the District is rural in nature and whilst arable and mixed farming predominates the area benefits from a diverse range of farming sectors, including dairy, livestock (beef and sheep), horticulture and ornamentals. The district employs 278% more people in the agricultural sector than its proportional average. Of the 1,700 employed, 1,550 are involved in the growing of crops and farming of animals sub-sectors. The District borders with the Vale of Evesham and hence large horticultural growers like Evesham Vale Growers (EVG), Vale Fresco and G's Fresh operate in the area growing salad leaves and spring onions. Employment particularly in these sectors has increased 9% since 2010, compared to a 3% decline nationwide, showing its strength and resilience to the changing economic environment³⁰. Going forward, the risk of automation is a future challenge facing workers in the sector, however most arable and livestock businesses have already adopted all the automation they can and for some sectors it is still many years away. The largest challenges currently facing agricultural businesses are capital to invest, planning legislation, connectivity, labour shortages and the uncertainty caused by Brexit.



The table above shows that the largest growth has been seen by the support for crop production and the smallest growth has been seen by the Support for Services to forestry.

Logging and Silviculture and other forestry activities were not apparent until 2014.

Support activities for animal and crop production have seen the most consistent levels of employment from 2010-2016. 2015 saw the peak for employment for all industries.

Economic activity in rural areas is diverse, with significant manufacturing and services sectors. It is also becoming increasingly dynamic. Knowledge-based and creative industries are growing rapidly. Flexible, home-working is more prevalent in rural than in urban areas, and tends to involve higher skilled, higher wage roles³¹.

³⁰ Stratford-on-Avon Economic Assessment, Full Report December 2017

³¹ Towards a one nation economy: A 10-point plan for boosting productivity in rural areas August 2015

The agricultural sector is susceptible to the potential impact of Brexit. Over 40% of workers in this sector earn less than the minimum threshold and it is a sector widely recognised for its dependence on migrant workers. Labour survey's conducted by the National Farmers Union (NFU) of England and Wales suggest Labour providers are reporting ever increasing difficulties in recruiting sufficient numbers of seasonal workers to meet growers' needs. In 2017/18, labour shortages equated to 12.5% below target. 67% of seasonal workers employed by respondents are being recruited from Romania and Bulgaria, a reduction on the same period in 2016 (76%). This could have significant implications given its importance to Stratford-on-Avon's economy. It is one of 3 sectors considered to have led the way in terms of growth since the recession. The sector is worth an estimated £69m a year, contributing 64% to Warwickshire's and 32% to the WMCA's agricultural sectors.

The replacement of skilled workers by AI could lead to workers moving toward lower-skilled jobs however automation able to pick strawberries and spring onions is still many years away. This means computer-based industrial automation could impact many occupations and industries. If workers skills become under-utilised, automation could have negative impacts on productivity, unemployment and inequality. The challenge is to optimise the benefits of automation whilst minimising the impact on society. The challenge in the short term is ensuring that sufficient labour is still available / permitted into the UK to ensure crops don't go unpicked.

4.2.2 Case Studies

Alscot Estate

Alscot is situated 3 miles south of Stratford upon Avon, is a thriving country Estate set rurally within almost 4,000 acres of countryside. The Estate's portfolio includes 125 residential properties and 140 business premises, ranging from 100 sq. ft. to 150,000 sq. ft. and comprises offices, studios, workshops, warehouses, industrial and manufacturing space, all with ample car parking and close to major transport links, and in turn employing over 1000 people on site. It offers super-fast, reliable broadband services with up to 36Mb/s upload and download speeds.

National Farmers Union (NFU)

The National Farmers Union (England & Wales) is based at NFU HQ, Stoneleigh Park, Kenilworth, Warwickshire and represents 55,000 farming members across England and Wales, involved in 46,000 farming businesses. In addition, it has 55,000 countryside members with an interest in farming and the countryside more generally. The NFU champions British agriculture and horticulture; campaigns for a stable and sustainable future for British farmers and aims to secure the best possible deal for its members. For example, last year the NFU launched its Combatting Rural Crime report. The bill for rural crime is now more than £42.5 million and farmers and their families in some parts of the country have been victims of arson, vandalism and burglary with many NFU members experiencing fear, intimidation and threats of violence. Vehicle theft, hare coursing and fly-tipping are also contributing to this widespread 'criminal tourism'.

www.nfuonline.com

University of Warwick

With over 25,000 students and employing over 6,000 staff, Warwick consistently ranks in the top ten of all major domestic rankings of British universities. It had a consolidated income of £591.0 million in 2016/17, of which £120.3 million was from research grants and contracts. The university is primarily based on a 290 ha (720 acres) campus on the outskirts of Coventry, with a satellite campus in Stratford-on-Avon District outside Wellesbourne. SDC is keen to support the University’s ambitions to create a centre for innovation at its Wellesbourne Campus site. The campus is currently home to the School of Life Sciences and the Warwick Crop Centre and the University is looking to explore the potential for an innovation centre around biotechnology, tapping into the research and development foundations of the Stratford-on-Avon economy.

4.2.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Employment has increased 9% since 2010, compared to a 3% decline nationwide • Sector is worth an estimated £69m a year, contributing 64% to Warwickshire’s and 32% to the WMCA’s agricultural sectors. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Over 40% of workers in this sector earn less than the minimum threshold • Digital connectivity and broadband coverage
<p>Opportunities</p> <ul style="list-style-type: none"> • Continued diversification • Explore whether declaration of Enterprise zones or implementation of Local Development Orders would be beneficial • Increased liaison with the farming Industry to identify challenges and potential solutions 	<p>Threats</p> <ul style="list-style-type: none"> • Risk of automation • Potential adverse impact of Brexit • Rural crime, including fly tipping and vandalism

4.2.4 Where we would like to be

Although advances in production techniques have historically benefitted the economy, smart technology, capable of deep learning and free movement, has the potential to replace complex jobs.

4.2.5 What we've achieved so far

WCC have recently published a report on The Risk of Automation in Warwickshire March 2018. It recommends that to ensure that the benefits of automation are realised, whilst minimising the losses, policy makers require a cohesive and proactive approach that can deal with rapid improvements in technology. For this reason, five policy recommendations are set out that can ensure beneficial outcomes;

1. retraining and continuous learning,
2. support co-investment by businesses in technology and skills,
3. attracting highly skilled, knowledge intensive occupations,
4. embedding skills for the future within education and training programmes,
5. recognising and promoting multiple careers.

4.2.6 What else do we need to do to get there

Continue to support diversification to encourage resilience in this sector (relevant policies in the Core Strategy include CS.22 and AS.10). Farm diversification can be in place of or in addition to traditional farming pursuits. About half of all UK farms use some form of diversified activity in their farming business and these bring an average of £10,400 extra revenue per farm. Other benefits of diversifying a farm include:

- making better use of the farm's physical resources and characteristics
- finding new uses for existing skills
- integrating the farm with, and recycling money within, the rural economy

Examples of the type of areas which may be acceptable include:

- livestock products - eg producing and selling sheep cheese, llama farms, goat dairying
- crop products - eg growing and selling speciality flowers, energy crops
- retail outlets and catering - eg opening a farm shop
- training and promotion of rural crafts - eg offering pleaching workshops
- opening facilities for craft making and retailing
- tourism - eg opening land up for camping or a bed and breakfast

Explore the feasibility of declaring enterprise zones in the rural area.

4.2.7 Key Objectives

8. To address skills shortages

10. To support and strengthen the rural economy

How does this fit with the West Midlands emerging Industrial Strategy?

5. Sectors

The emerging West Midlands Industrial Strategy is currently silent on the agricultural sector. CWLEP and SDC have raised this as an omission in the emerging Strategy in their respective responses, which it is hoped will be rectified in the final version.

4.3 Growing businesses and Start-ups

4.3.1 Where we are now

The total number of businesses in Coventry and Warwickshire has been growing over the period from 2013 to 2017. The average annual change in Stratford-on-Avon District is +230 jobs. The change in the number of business births between 2011 and 2016 has been +890 for Stratford-on-Avon.

Stratford-on-Avon has a high business start-up and entrepreneurship rate in Warwickshire.

The business survival rates for 2011 businesses for one, two, three, four and five years in Warwickshire are higher than the rates for the West Midlands and the UK.

The highest growth in employment over the period from 2011 to 2015 in Warwickshire has been seen in Stratford-on-Avon (+7,000).

Industrial activities and Research and Development are seen as important economic sectors for the area, however, Warwick and Stratford-on-Avon (together) accounted for less than 15% of the available total. It is recognised that innovation plays a critical part in growth and productivity, whether through addressing the demand from industry for improved products and services or creating new companies through the commercialisation of technology. Warwick University plays a key role in both and supports many of the regional networks which disseminate knowledge to business (for example through the Coventry & Warwickshire Business Festival). More could be done to build on the success of Business Ready and ensure Stratford-on-Avon businesses are aware of innovation programmes.

The software and gaming sector (Ready Made Interactive Leisure and Entertainment Software Development) is highly concentrated in Warwickshire (600 employees and an Location Quotient (LQ)³² of 6.1), with particular concentrations in Stratford-on-Avon (300 employees and an LQ of 13.0)³³

Automation and Artificial Intelligence (AI) can present some challenges around displacing current occupations, but also huge opportunities through new markets, products and services. A well skilled area such as Stratford-on-Avon could be well-placed to exploit opportunities and links to some key sectors around mobility, agri-tech and digital technologies.

4.3.2 Case Studies

Sitel

Sitel LLC provides direct marketing services. The Company offers capturing customer service information, collection, and data gathering throughout web, e-mail, fax, short message system, and traditional mail. The heart of the UK business is still in Stratford-on-Avon and Coventry, and Sitel has grown rapidly over the past 5 years. This growth has led to the creation of over 700 additional jobs for the Warwickshire region in the last 2 years and over 1,000 across the UK.

³² A Location Quotient is calculated by dividing the percentage of total employment in a sector in a local area by the percentage of total employment in the same sector nationally. A Location Quotient of less than 1.0 means a lower concentration of employment in that sector than nationally, and a Location Quotient of greater than 1.0 means a higher concentration of employment in that sector than nationally

³³ draft Coventry and Warwickshire Sub-Regional Employment Market Signals Study draft report September 2018

Quinton Rail Technology Centre (QRTC)

The Rail Alliance is a B2B (business to business) networking organisation “that sits at the very heart of the rail supply chain”. In partnership with RAIL Magazine, an annual outdoor exhibition called ‘Rail Live’ is staged at Quinton Rail Technology Centre located on the former Long Marston Depot. Rail Alliance works closely with the Rail Research UK Association (RRUKA) which is also based at Long Marston. Various rail-related tests can be carried out at Quinton Rail Technology Centre in connection with product development, certification and training. One section of the continuous test track is equipped with overhead catenary.

4.3.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Entrepreneur rates 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Insufficient supply of employment land for industry and R&D • Digital connectivity
<p>Opportunities</p> <ul style="list-style-type: none"> • Demand is for more flexible / “mid-spec” workspace (rather than traditional Grade A space) • Creative and Digital sector spin off • Explore need to supply additional employment land through the Core Strategy Review • Explore the possibility of rolling Venture House model out more widely across the District. Build on the success of ‘Business Ready’ and ensure Stratford businesses are aware of innovation programmes. • Explore opportunities around Automation and Artificial Intelligence • Rail is a key sector with strong growth opportunities, and Stratford District has a key asset in respect of the QRTC, which could be significantly enhanced and built on. • Explore potential for development of a creative innovation hub in Stratford building on inherent creative skills and talent 	<p>Threats</p> <ul style="list-style-type: none"> • Increasing demand for employment land/sites

4.3.4 Where we want to be in 2023

Continue to enjoy high employment rates and support business start-ups (entrepreneurs) and survival. Identify sufficient and appropriate employment sites to meet future growth demand.

Focus on bespoke solutions for individuals, for example, through 'Thrive into work' programme- a new employment support service for people with mental health and/or physical health condition in primary and community care programme <https://thriveintowork.org.uk/>

Explore the role social enterprise can play in economic growth to diversify the types of economic activity available to create opportunities and improve wellbeing and productivity for people and communities.



Discover more about Social Enterprise @ www.socialenterprise.org.uk/

4.3.5 What we've achieved so far

Venture House

Opened in 2016, Venture House provides flexible, productive business space for new and fledgling businesses. Owned and managed by SDC, this unique environment offers free on-site business support, free on-site parking, alongside flexible hot desking/co-working space, serviced offices and meeting facilities to accommodate a range of business needs. Venture House is well located for all major road and rail networks with Birmingham airport just over 30 minutes' drive. The Centre aims to inspire a new generation of entrepreneurs and offers support to existing small enterprises on their journey to growth. Delivered on time and in budget, Venture House was one of just 12 projects across the county funded through the first round of the Government's Growth Deal Programme.



Discover more about Venture House @ www.venturehousetratford.co.uk
Tel. 01789 207500

Business Support Programmes

Coventry and Warwickshire Growth Hub and Warwickshire County Council funded programmes such as Business Ready work with businesses of all sizes and ages to promote growth. For example, Stratford-on-Avon SME's have accessed £840,000 worth of grants through Warwickshire County Council's business support programmes. This money is inevitably leading to fewer business death rates in the district and improved productivity.



Discover more about the Coventry and Warwickshire Growth Hub @
www.cwgrowthhub.co.uk Tel. 0300 060 3747

4.3.6 What else do we need to do to get there

Demand for office space will be for more flexible / basic floorspace with image and character. Conversions of existing buildings in good locations with decent digital infrastructure, to support growth in the creative sector, will however provide an opportunity for more development over the next few years.

Explore different delivery models or partnership arrangements between the public and private sectors.

Explore the need to increase employment land supply.

Explore what role SDC can play in assisting with business expansion in the District. Although business 'death' rates have fallen and the number of business 'births' has risen, businesses in Warwickshire are struggling to expand. The 2017 Quarterly Economic Survey showed that 1 in 4 businesses in Coventry and Warwickshire feel cash and access to finance is their biggest barrier to growth.

4.3.7 Key Objectives

2. To improve broadband connectivity

3. To improve access to finance

12. Encourage business growth in new sectors- growing high quality, high value jobs within growing sectors of the future

How does this fit with the West Midlands emerging Industrial Strategy?

2. Ideas and innovation

The WMIS recognises the importance of creating the correct environment for business growth and for encouraging innovation to enable the economy to grow and futureproof prosperity.



5. Aim 2: Prosperous Communities and Infrastructure Upgrade

75% of Stratford-on-Avon's residents own their homes creating significant material wealth for homeowners, driven by a 25% increase in house prices in the last 5 years resulting in median house prices that are higher than Warwickshire, the WMCA and England. We want to maintain the prosperity that high house prices bring to the District but at the same time are acutely aware of the flip-side; the severe un-affordability of housing across the District and the impact this has on low paid workers in particular, many of whom work in a declining retailing sector. A significant proportion also work in the agricultural sector where 40% of workers earn less than the minimum threshold. This strategy therefore seeks to make Stratford-on-Avon communities the most prosperous in Warwickshire.

5.1 Culture, Tourism and Heritage

5.1.1 Where we are now

Since 2009, around 1,100 new jobs have been created to directly supply the local tourism industry. The growth and success of tourism in Stratford-on-Avon has been down to the increase in overnight visitors. These visitors now account for 11% of total visits but contribute 44% to total visitor expenditure. Of the 89 destinations across the UK that receive more visitors a year than Stratford-on-Avon, only 13 have a larger proportion of overnight visitors. This number has increased 18% over the last seven years and reflects how well the area is doing at retaining visitors overnight³⁴.

The success of the tourism industry has brought about a 17.5% increase in jobs in a sector that is categorised as low-wage. As a result, the district has a larger-than-average proportion of workers in low-wage sectors (40%). The local tourism industry is also less productive than the national equivalent. Workers directly associated with the tourism sector in Stratford-on-Avon produce £35,300 worth of goods and services a year, compared to £36,875 across England. Qualifications are also lower-than-average, with just 19.5% of workers requiring at least an A-level qualification (NVQ3+) as opposed to 20.3% nationwide. Expansion in this sector has, therefore, contributed to the fall in the overall skills required in the economy in recent years.

Catching up with the productivity level in the national tourism industry could add as much as £11.6m a year to the local economy. This will be important for future growth in the sector given its susceptibility to immigration control changes in the face of Brexit. Our research finds that bar staff, waiters and waitresses, chefs, receptionists and other customer service occupations have both a larger-than-average proportion of people working in them locally and a low resilience to changes in immigration controls. If EU workers were to face the same immigration controls as non-EEA workers, at least 75% of jobs would not be able to be filled by non-UK workers in these occupations. Across all sectors, 37.1% of workers in the district earn less than the minimum threshold for non-EEA workers, much higher than the England average (32.1%).

There is also potential to boost the night time economy in Stratford-on-Avon which has seen a decline in recent years. This should be managed carefully and inclusively. Stratford –upon-Avon should move away from the culture of 'pre-theatre' and embrace the 'post theatre' culture.

³⁴ Stratford-on-Avon Economic Assessment Full Report December 2017

Pashley Cycles is England’s longest established bicycle manufacturer. It was founded in 1926 and is based in Stratford-upon-Avon. Furthermore, Boardman Bikes is located close by in Evesham. The area also has a large concentration of cycling clubs. There are obvious benefits to health and well-being and it is possible that there may be economic potential of developing and promoting this sector further.

5.1.2 Case Study

Royal Shakespeare Company

The Royal Shakespeare Company (RSC) is a major British theatre company, based in Stratford-upon-Avon. The company employs over 1000 staff and produces around 20 productions a year. Over 1 million visitors come to Stratford-upon-Avon theatres each year. Each year they reach more than 1,200 schools and 500,000 children and young people through Education work, transforming experiences of Shakespeare in the classroom, on performance and online. In 2016/17 a surplus of £4m was delivered. This was saved for future investment.

5.1.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Increase in overnight visitors now account for 11% of total visits but contribute 44% to total visitor expenditure and this should be built on. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Across all sectors, 37.1% of workers in the district earn less than the minimum threshold • 17.5% increase in jobs in a low-wage sector • Qualifications are lower-than-average
<p>Opportunities</p> <ul style="list-style-type: none"> • Improving connectivity with larger night-time economies • Improving Stratford- on- Avon’s night time economy where appropriate • Opportunities to strengthen the tourism sector by focussing on improving productivity levels (through investment and upskilling) • Reopening of the former Stratford to Honeybourne line • Explore the potential of developing the cycling leisure sector 	<p>Threats</p> <ul style="list-style-type: none"> • If EU workers were to face the same immigration controls as non-EEA workers, at least 75% of jobs would not be able to be filled by non-UK workers in these occupations

5.1.4 Where we would like to be in 2023

The local tourism industry is doing a good job at retaining the most valuable tourist (overnight visitors) but we need to continue to maintain and potentially increase the proportion of visitors overnight. Improving productivity in the tourism sector – increasing productivity to the national standard could add as much as £11.6m a year to the local economy. Improving connectivity with larger night-time economies, such as Birmingham and Leamington Spa could also provide a healthy supply of workers to the sector with the potential impact of Brexit on the horizon.

5.1.5 What we've achieved so far

Shakespeare's England is the official destination management organisation for Stratford-upon-Avon, Warwick, Royal Leamington Spa, Kenilworth and the surrounding towns and villages. It is a not-for-profit membership organisation supported by the region's key tourism businesses and local authorities. Its role is to encourage visitors to South Warwickshire and the surrounding areas and to encourage overnight stays. They are responsible for the production and implementation of the Destination Management Plan 2015 – 2025.

Stratford-upon-Avon has strong links with China and a new cultural attraction is being built in Sangweng 14km from Fuzhou, which will celebrate the lives and works of William Shakespeare, Tang Xianzu and Miguel de Cervantes. Sanweng will feature reconstructions of some of the hometowns of each artist. Additionally, the Fuzhou Municipality is gifting SDC a traditional Peony pavilion, which is a typical symbol of the works of Chinese playwright Tang Xianzu, and this will be positioned in parkland in Stratford-upon-Avon town. It is hoped that this collaboration will see increased business and trade links with the Fuzhou region bringing in investment and boosting the economies of both regions.

As part of the CWLEP Growth Deal, which was specifically made available to support culture and tourism in light of the Coventry City of Culture and the Birmingham Commonwealth games, funding has recently been awarded to 4 projects in Warwickshire two of which are located within Stratford-upon-Avon namely:

- Royal Shakespeare Company (RSC) Costume Workshop redevelopment will be given £1 million to restore and redevelop its costume workshop, enabling public access for the first time.
- Henley Street in Stratford-upon-Avon has been awarded £0.462 million to create a world-class setting at Shakespeare's Birthplace. There will be a high-quality re-design of the streetscape to create a safe, welcoming social space. The successful joint bid was submitted with Shakespeare's Birthplace Trust. Delivery of hostile mitigation measures costing £55k will additionally be funded by Warwickshire County Council.

A study into the potential funding of the reopening of the former Stratford to Honeybourne line is currently being undertaken and is due to be submitted in late November 2018.



Discover more about Shakespeare's England @ www.shakespeares-england.co.uk

5.1.6 What else we need to do to get there

Discuss with WCC and Network Rail the potential to increase frequency, destinations and later night time train services ie to Birmingham and London and evening services to coordinate with RSC performance times.

To increase productivity, growth and wages in the future, it will be important to focus on increasing jobs that require a greater level of qualification. These types of jobs also pay more and would give the workforce a better chance of living nearby.

Help workers to move up the value chain and access more employment opportunities through work progression by increasing support available to people to access in-work progression opportunities, particularly for employers and residents working in tourism, retail and other historically lower paying sectors, where technological change will open up new, higher skilled roles. This will require focus through business support and skills provision.

5.1.7 Key Objectives

5. To address highway congestion and transport infrastructure

8. To address skills shortages

9. To focus on service sector employment and the young

How does this fit with the West Midlands emerging Industrial Strategy?

5. Sectors

The WMIS recognises the importance of tourism and that the West Midlands is the UK's fastest growing region for international visitors – attracting a record 2.3 million overseas visits in 2017, up by nearly 50% over the last six years. Business, conference and exhibition tourism is a particular strength. The Shakespeare's England area, which includes Stratford, is one of the UK's largest cultural tourism draws, with around 9.3 million people visiting every year.

5.2 Connectivity

5.2.1 Where we are now

Lack of superfast broadband to business premises is severely impacting the ability of businesses in Stratford-on-Avon to compete in the global marketplace. Furthermore, the ability of residents to apply for jobs, undertake training and to enjoy the benefits of more flexible working is also stifled by the lack of superfast broadband meaning that Stratford-on-Avon struggles to compete with more urban and better connected areas. This is a particular concern given the entrepreneurial nature of the local economy and potentially a missed opportunity given the proximity of the District to Silicon Spa.

5.2.2 Case Study

Silicon Spa

This globally significant gaming cluster is centred in neighbouring Leamington Spa (aka “Silicon spa”) but stretches out to surrounding areas such as Southam, in Stratford-on-Avon District. 75% of the digital media companies in the area are gaming companies compared to the more typical 5-10%. Over 30 studios operating, the cluster employs 10% of the UK total in games development including companies such as Codemasters³⁵.



Discover more about Silicon Spa @ www.siliconspa.com

5.2.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Proximity to Silicon spa/Golden Triangle and potential spin off 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Large rural district
<p>Opportunities</p> <ul style="list-style-type: none"> • Reductions in congestion by remote working being possible • Business start-ups/entrepreneurs • Digital and Creative- develop opportunities to link to and benefit from ‘Silicon Spa’, and wider business opportunities that link to other sectors (automotive, culture, tourism, future of retail) 	<p>Threats</p> <ul style="list-style-type: none"> • Lack of connectivity will stifle economic growth and may lead to loss of businesses to other areas

5.2.4 Where we would like to be in 2023

A greater proportion of the District will have access to superfast broadband.

³⁵Statistics from www.siliconspa.com/

5.2.5 What we've achieved so far

In March 2018 it was announced that thirteen areas across the UK were set to benefit from the first wave of funding from the Government's £190 million Local Full Fibre Network (LFFN), the Chancellor announced in today's Spring Statement. Furthermore, the government's assignment of £2 million to the Coventry and Warwickshire sub-region from the Local Full Fibre Network Challenge Fund, will both increase and improve the fibre connections available to businesses in the area. This will therefore improve the suitability of the C&W LEP areas to firms looking to expand operations in the Midlands over the long run.

With the assistance of the Coventry Solihull Warwickshire (CSW) Broadband project, and commercial rollout, superfast broadband coverage in Stratford-on-Avon moved from 45% in 2013 to 75% in 2016. By the end of Contract 2, Part 1, superfast broadband coverage is expected to reach 89% of premises in Stratford-on-Avon, leaving the most challenging locations still to be upgraded. CSW Broadband have attracted over £2m ERDF funding, which will form part of an overall package of up to £20m additional superfast broadband rollout throughout the project area. SDC is also exploring the possibilities for the provision of wireless technology to ensure that even the more remote businesses and communities can benefit from superfast broadband.

5.2.6 What else we need to do to get there

Explore opportunities and actions due to proximity to Silicon Spa.

5.2.7 Key Objectives

2. To improve broadband connectivity

How does this fit with the West Midlands emerging Industrial Strategy?

3. Infrastructure

5. Sectors

It acknowledges that there is still a significant variation in superfast broadband, full fibre and gigabit capable broadband coverage.

Furthermore it also recognises that our creative sector continues to grow, including important maker clusters and a globally significant concentration of gaming and innovative and immersive content and high-end production, centered on screen media including film, TV and virtual reality (VR) and augmented reality (AR).

5.3 Infrastructure

5.3.1 Where we are now

In terms of strategic transport connections, the M40 and M42 both cross the District. The other strategic route is the A46 that crosses the District between Evesham and Warwick and forms the northern bypass to the town of Stratford-upon-Avon. The A435 affects Studley, Mappleborough Green, Coughton and Kings Coughton and there is a need for environmental improvements along the route. The passage of HGVs through this area causes safety concerns. Studley also has a declared Air Quality Management Area.

Like most historic market towns, Stratford-upon-Avon and key strategic routes across the District suffer from traffic congestion which causes delays and impedes productivity. This is due to a combination of the historic street pattern, investment in highway infrastructure not matching housing growth and poor public transport alternatives.

With the digitalisation of the economy, the demand for electricity is increasing significantly. Business leaders have raised concern about the adequacy of power supply across the sub-region and the impact lack of power is having on economic growth. There is a particular concern locally given the transition of the automotive sector to electric vehicles, notwithstanding the additional significant demand that electric vehicle charging points will add to the electricity demand.

5.3.2 Case Study

A46 Partnership

SDC is a member of the A46 partnership; a group of local authorities and Local Enterprise Partnerships along the 70mile stretch of the A46/M69. It has been formed to promote the importance of this key strategic route and ensure necessary improvements and upgrades are delivered to ease congestion and support economic growth. The A46/M69 connects Stratford-upon-Avon town with the M5 at Tewkesbury, the M40 near Warwick, the M6 near Coventry, the A5 near Nuneaton and the M1 at Leicester.

5.3.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Stratford is located centrally within the Country and close to the motorway network 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Historic road network and River Avon provides challenges to efficient running of highway network • Predominantly rural district with challenges to overcome in providing full broadband coverage
<p>Opportunities</p> <ul style="list-style-type: none"> • SWRR • To encourage the growth of low-carbon technologies and the efficient use of resources including District Heating 	<p>Threats</p> <ul style="list-style-type: none"> • Increasing demands on infrastructure due to an aging population • If congestion fails to be sufficiently tackled this would restrain local economic growth and encourage outward migration of business

5.3.4 Where we want to be in 2023

Commence negotiations with WCC, the bus companies and Network Rail to continue to improve public transport provision.

Continue to make highway improvements to relieve congestion for example ensuring satisfactory implementation of SWRR to reduce congestion by providing a relief road to Stratford-upon-Avon and facilitate implementation of Long Marston Airfield housing development of 3,100 dwellings.

Nominate a political Champion for Energy.

5.3.5 What we've achieved so far

A3400 Birmingham Road Improvements

The A3400 Birmingham Road in Stratford-upon-Avon suffers from congestion. Warwickshire County Council with support from SDC has already secured funding for highway improvements which they are actively pursuing for implementation in the next 2-3 years.

South West Relief Road (SWRR)

Policy provision made via Core Strategy (Proposal LMA) and planning application submitted as at September 2018.

5.3.6 What else we need to do to get there

- Continue to seek improvements and upgrading of the A46 and involvement in Partnership.
- Reduce congestion on the A435.
- Ensure satisfactory implementation of SWRR to reduce congestion by providing a relief road to Stratford-upon-Avon and facilitate implementation of Long Marston Airfield housing development of 3,100 dwellings.
- Seek improvements to rail services to/from Stratford-upon-Avon for example to London and increasing evening services and linking in with RSC performance times.
- Encourage improvements in bus provision
- Encourage car sharing, 'walking buses' etc
- Continue to encourage staggering of employment work hours of large employers.

5.3.7 Key Objectives

5. To address highway congestion and transport infrastructure

6. To improve energy supply

How does this fit with the West Midlands emerging Industrial Strategy?

3. Infrastructure

The importance of an efficient infrastructure system is recognised in the WMIS. It acknowledges that we are a well-connected region. But it recognises that there is an overreliance on the road network compared to other modes of transport, which results in poor air quality and costly congestion.

6. Aim 3: Good Jobs and Greater Earning Power

Stratford-on-Avon District is in the top 15 of all local authorities in terms of the level of disposable household income. The percentage of the population with a NVQ level 4 or above is higher than Warwickshire, the WMCA and England. The District has a low unemployment rate and a higher than national average median full-time hourly wage. These are all strengths that SDC wants to maintain. However, at the same time there is an imbalance in the economy between skills of the employees and the jobs on offer. For example businesses in rural areas are also less likely to provide vocational training, including NVQs and apprenticeships, than businesses in urban areas. This strategy seeks to increase the number of higher value jobs and therefore improve the earning power.

6.1 Retail and Town Centres

6.1.1 Where we are now

Like the rest of the UK, Stratford-on-Avon's high streets are facing an uncertain future with strong competition from internet retailers. Whilst Stratford-upon-Avon town may fare better than others given the influx of tourists, the type of shops and the nature of shopping is undoubtedly changing. High streets and town centres also play an important role in maintaining vibrant communities; empty shops can lead to a spiral of decline. The Retail trade sector employs the second largest proportion of Stratford-on-Avon's workforce. Half of those are employed in 'Non-specialised stores with food and beverages', which will predominantly serve the tourism industry. Due to demand from the tourism industry, Stratford-on-Avon has the largest proportion of jobs in low-paid sectors in Warwickshire. This is down to the retail and accommodation sectors typically paying below average wages.

Retail sector employs around 5,100 people - approx 11% less than the national average.

Average earnings are approx £1,600 less than the national average for this sector.

Since 2009 employment has increased by 17.6% compared to a 2.4% fall nationwide.

The latest growth figures show employment has increased by 14.9% last year (average sector 2.9% and retail sector nationwide is -1.6%).

It is recognised that the nature of High Streets are changing and embracing a wider range of uses such as residential and leisure uses. It is important that uses continue to contribute to the vibrancy and relevance of Town and local centres as a community and, in some cases, visitor resource.

There is a danger that companies risk being left behind unless they have the skills to take advantage of technology to remain competitive and responsive to their customers.

6.1.2 Case Study

Bell Court, Stratford upon Avon

Stratford-upon-Avon's exciting new £30million Bell Court development provides a new hub in the heart of the Town Centre offering a boutique cinema, restaurants and shops.

6.1.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Vibrant Stratford upon Avon Town centre • Visitors contribute to this vibrancy • The Retail trade sector employs the second largest proportion of Stratford's workforce • Main rural Centres are important in a large District to serve local communities 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Stratford has the largest proportion of jobs in low-paid sectors in Warwickshire • Retail and accommodation sectors typically paying below average wages
<p>Opportunities</p> <ul style="list-style-type: none"> • Visitors contribute to this vibrancy. Could suppose this will continue as Town famous for Shakespeare and this is a constant • Stronger tourist offer and increasing overnight stays 	<p>Threats</p> <ul style="list-style-type: none"> • Uncertain future with strong competition from internet retailers • Out of town centres create competition for retail uses normally found in Town Centres • Declining commercial activity in some Main rural centres

6.1.4 Where we would like to be

Continue to maintain vibrant Town and Main Rural Centres with an appropriate balance of uses continuing to cater for needs of residents and tourists where appropriate.

To ensure the Town and local centres remain attractive even when there are vacant units and construction works underway.

6.1.5 What we've achieved so far

- Emerging Stratford Gateway masterplan
- Stratford- upon-Avon Neighbourhood Development Plan
- Refurbishment of Bards Walk in Stratford-upon-Avon completed and mostly occupied.
- Continued promotion of markets including farmers, including, for example, Crafts and Christmas markets.
- Town and local centre events encourage retail activity such as Shakespeare celebrations, River Festival, Stratford- upon- Avon Food festival Shipston Wool Fayre, Alcester Food and Folk festivals, Henley in Arden music festival etc

6.1.6 What else we need to do to get there

1. Stratford-upon-Avon Town centre health check to closely monitor the types of uses that are being lost. Also monitor retail uses in other local centres.
2. Depending on survey outcomes consider Policy in Core Strategy Review to deal with balance of Town Centre uses.
3. Depending on survey outcomes consider introducing mechanism to bring into use vacant shops with:
 - temporary uses
 - renting out at reduced rate to start-up companies to advertise their products
 - renting out at reduced rate to start-up companies to test out their products in the market or in the interim design an exciting/vibrant 2D display which must be displayed in all vacant shops?
4. Appoint Town Centre Manager/champion.
5. Produce town centre business plan complete with timelines, capital and revenue costs and benefits.
6. Continue to monitor changes of use in Main Rural Centres.

6.1.7 Key Objectives

4. To enhance the High Streets

How does this fit with the West Midlands emerging Industrial Strategy?

5. Sectors

CWLEP and SDC have responded to the consultation on the Strategy that it currently does not contain enough detail regarding the future of High Streets/Town centres and Retail as a sector.



6.2 Skills

6.2.1 Where we are now

The proportion of residents qualified to NVQ4+ has been rising in both Coventry and Warwickshire over the period from 2013 to 2017, in keeping with a national increase. The proportion of residents qualified to NVQ4+ is higher in Warwickshire (40.4% in 2017) than in Coventry (34.7% in 2017). Warwickshire has a higher proportion of well qualified residents than the UK, but Coventry has a lower proportion than nationally.

There is a mismatch between supply and demand of skills in the area. In the 2017 Quarterly Economic Survey, 1 in 3 businesses reported a skills shortage as their biggest barrier to growth. Matching the skills demanded by businesses with those supplied by schools should reduce unemployment, out-commuting and business death rates. Now, more than ever, we require the efficient use of labour to promote improvements in competition and productivity.

Over a quarter of Warwickshire's 16-24 working population works in Stratford-on-Avon District, yet they have the highest employment rate for this demographic – 74.8% of 16-24 year olds are in employment. Also, 70% of 16-19 year olds are in part-time employment. There is evidence to suggest the high uptake in 16-24 year olds is to service the tourism and retail industries. This temporary employment can be problematic for employers in these sectors.

The increase in the middle skill category has been driven by the increase in those employed with level 3 qualifications. The rise in this skill level means that the average resident is now more skilled than in 2010. The skills shortages in business are recognised as a major barrier to growth, despite the high level of NVQ4+ qualifications in the District

There are likely to be local economic opportunities arising from the need to develop/broaden the housebuilding skills/construction base: e.g. developing new technologies associated with modular construction; climate change mitigation and resilience measures and decarbonisation measures.

6.2.2 Case Study

Skills 4 Growth programme

Funded by ESF and WCC, is aimed at training underqualified workers in Advanced Manufacturing, Engineering and Service Sector industries (key sectors for Stratford-on-Avon).

6.2.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Residents trained to NVQ4+ rising 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Mismatch between supply and demand for skills
<p>Opportunities</p> <ul style="list-style-type: none"> • Training opportunities and apprenticeships including those in housebuilding skills/ construction. • Working with Warwick University by creating wider opportunities for the talented graduates to remain in Warwickshire and build their careers here 	<p>Threats</p> <ul style="list-style-type: none"> • Temporary employment can be problematic for employers in tourism and retail sectors

6.2.4 Where we want to be in 2023

Encourage more apprenticeships in tourism and retail industry or management training schemes such as that implemented by Marks and Spencer.

Facilitate better liaison between business and 6th Form Schools and colleges

Support more apprenticeships in rural areas, for example, in food and farming and by helping small tourism businesses to provide more high quality apprenticeships.

Greater encouragement and recognition of value of transferable skills. Adaptable/flexible/transferable skills set is needed (ie life skills) including communication.

6.2.5 What we've achieved so far

There is much research to suggest apprenticeships and skills programmes increase the future income of young people and also reduce the cost to society. With Stratford-on-Avon benefitting from an increase in businesses who employ high-skilled labour, helping improve the relationships between schools and businesses could allow Stratford-on-Avon District to capitalise on a flow of better qualified and more specialised workforce. Warwickshire County Council works in conjunction with businesses and schools to address skills shortages. 12 Schools in Stratford-on-Avon have received a total of approximately £250,000 from numerous grants to help create sustainable partnerships with local businesses. The project aims to enable young people to gain skills and attributes employers require.

T Levels will start to be introduced from 2022 with the aim of being seen as the equivalent of A Levels for technical, vocational qualifications. This is an important development for young people, educational institutions and businesses.

The University of Warwick is helping to address skills shortages through their degree apprenticeships programme, including the £10m Degree Apprenticeships Centre focused on high value manufacturing and due to open in 2019.

The challenge is in connecting skilled people with opportunities in business and in making it easier for business to find the right route into HE and FE.

The Collaborate to Train programme supported through the European Social Fund brings a range of educational partners (Warwickshire College Group, the University of Warwick, City College Coventry, North

Warwickshire and South Leicestershire College, Coventry University Social Enterprise, Coventry City Council, Warwickshire County Council and Henley College) together to combine recruitment and training expertise across the Coventry and Warwickshire LEP area. The programme aims to engage over 250 small businesses over a three year period and improve access to new talent whilst providing high quality, effective education and training services in a more collaborative, business-led way. There is more that can be done in this area, however, to create wider opportunities for the talented graduates from the University to remain in Warwickshire and build their careers here.



Discover more about growing your business @ www.warwickshire.gov.uk/growingyourbusiness

Skills for Employment – is a Warwickshire employability charter whereby more than a hundred Warwickshire organisations have been awarded the charter for their commitment to develop the employability skills of young people. Commitment confirms the organisation will participate one or more of the employability activities listed in the charter document which is signed by the leader of Warwickshire County Council and can be downloaded by organisations for display or other purposes. Organisations also receive a Charter mark for use in stationery and publicity as they wish.

Skills base

The low-wage sector is functioning to serve increases in tourism and consumption, whereas the high-skilled sectors are improving Stratford-on-Avon's productivity and standard of living. In combination they work to provide a sustainable economic growth model. Notwithstanding this, there is a high level of entrepreneurial activity in Stratford-on-Avon. Seeking to capitalise on this and in conjunction with the Skills 4 Growth programme, funded by ESF and WCC, this project is aimed at training underqualified workers in Advanced Manufacturing, Engineering and Service Sector industries (key sectors for Stratford-on-Avon).



Discover more about growing your business @ www.warwickshire.gov.uk/growingyourbusiness

6.2.6 What else we need to do to get there

Continue to hold discussions with businesses and education providers regarding the possibility of requirements and future potential such as providing work experience and apprenticeship schemes etc. Investigate use of local labour deals in S106 and encouraging apprenticeship schemes.

6.2.7 Key Objectives

- 8. To address skills shortages.
- 9. Service sector employment and the young

How does this fit with the West Midlands emerging Industrial Strategy?

1. People, Skills and Employment

The WMIS acknowledges the variances in skills across the region and the importance of education and matching skills with jobs.

6.3 Incomes and Jobs

6.3.1 Where we are now

In 2017 GVA per head, a proxy for economic wellbeing, stood at £32,578. This rose to £35,009 in 2018 GVA per head (£). Stratford-on-Avon has consistently outperformed county, regional and national averages since 2004 but the gap between the district and the national average has increased significantly since 2009. During the recession, the GVA per head gap was just 1%, this has increased to 25% in just 7 years. Stratford District now has a GVA per head figure that is in the top 10% of all local authorities across the UK, and behind only 25 places outside of London. This reinforces the belief that Stratford-on-Avon has a relatively good standard of living.

In Stratford-on-Avon district the number of jobs exceeds the resident population and national average which means there is higher in-commuting into Stratford-on-Avon for employment. The significant rise in workplace wages, over and above resident wages, reflects the short supply of workers in the district. Since 2010, the average qualification level of a Stratford-on-Avon worker has fallen, yet workplace wages have increased twice the national average. The falling working-age population, low unemployment rates and significant job growth suggests the UK-wide skills shortage is more prominent locally.³⁶

Stratford-on-Avon employs the highest number of people in LEP key priority sectors (41%), but they also have the largest proportion of the working population in low-paid sectors (34%). The social implications of this are also of concern as low pay can have a wide ranging adverse impacts for example on health and the perpetuation of poverty. The number employed in low-paid sectors is high, and so is the number of job listings. This suggests demand in these sectors is growing. An increase in demand could be explained by the fast growth in hospitality and food preparation sectors. However, the resultant effect is that there is a 'hollowing out' of the middle-skilled population who find themselves under- or overqualified for the majority of jobs. These workers will need to commute to other areas to find jobs, reflected in the low self-containment in the region. Whilst SDC does not want to stifle growth in particular sectors, it is keen to ensure a better balance of jobs across all pay sectors and reverse the declining trend for middle-skilled workers.

Projects to accommodate future population growth and economic development will create potential demand for new jobs and businesses, which translates into demand for floorspace.

House prices in the last four years have increased 20% in the district and house prices for first-time buyers are £100,000 above the national average, making it difficult to attract the 'magic demographic' age group at the start of their business careers. The cheapest 10% of homes in the area has increased by £58,000 to £226,995 in the last year, the highest in Warwickshire. The speed at which average house prices are rising means it is only those who have been in the workforce a number of years who are able to purchase property in the region. The impact on businesses is that they may struggle to recruit workers which may impede economic growth.

Housing affordability is a complex issue and not one that can be addressed by the planning system alone. The traditional approach to control it has been on the basis if more houses are made available, prices will stabilise and, with inflation, gradually become more affordable.

There are also concerns around lower opportunities for social mobility and those on borderline incomes. This includes, for example, single parents returning to work and facing substantial childcare fees resulting in worklessness being the more viable option than working. This is obviously a very unfortunate and unintended outcome for all especially, for example, meaning that those who have invested in higher level education cannot fully utilise their skills.

³⁶Stratford-on-Avon Economic Assessment Full Report December 2017

6.3.2 Case Study

Jobs in automotive industry in the Region

There are several internationally renowned companies based in the region including Jaguar Land Rover, BMW, General Electric, and Aston Martin Lagonda; together with a high concentration of jobs in these sectors (34,000 people in Coventry & Warwickshire are employed in Advanced Manufacturing); and higher recent growth rates than the UK as a whole.

6.3.3 Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • <i>Attractive District for investment</i> • <i>GVA per head is strong</i> • <i>Low unemployment rates</i> 	<p>Weaknesses</p> <ul style="list-style-type: none"> • <i>Housing affordability</i> • <i>Large number of jobs in low paid sectors</i> • <i>Lack of jobs in middle-skilled jobs</i> • <i>Low unemployment rates mean less spare capacity in the labour force</i>
<p>Opportunities</p> <ul style="list-style-type: none"> • <i>Explore potential for identification of further land for employment purposes through the Review of the Core Strategy</i> • <i>Examine the issue of worklessness and the cost of childcare fees and explore ways to address this</i> 	<p>Threats</p> <ul style="list-style-type: none"> • <i>Demographic imbalance- aging District</i> • <i>Recruitment of suitable workers</i>

6.3.4 Where we want to be in 2023

Continue to encourage positive growth in low and middle skilled occupations and continue the emphasis on up skilling the workforce. By proactively tackling the obstacles facing the local labour market, the economy can continue to expand at a faster-than-average rate.

The key to addressing housing affordability may not be to flood the housing market. The objective could be to have policies that mitigate the artificial inflation of asset prices, ensure that supply is not restricted from responding to genuine demand and that enable home buyers, through their own efforts, to make more rapid progress to being able to enter the market.

6.3.5 What we've achieved so far

Stratford on Avon District enjoys low unemployment rate (3.2%); a 77.7% employment rate; has 45.4% residents have NVQ level 4 qualifications or above and has a high GVA per head.

6.3.6 What else we need to do to get there

Explore the need to identify further land for employment purposes.

Facilitate better liaison between business and 6th Form Schools and colleges.

Support more apprenticeships in rural areas, for example, in food and farming and by helping small tourism businesses to provide more high quality apprenticeships.

6.3.7 Key Objectives

- 7. To address affordability of homes
- 8. To address skills shortages
- 11. To ensure all residents feel the benefits of rising prosperity

How does this fit with the West Midlands emerging Industrial Strategy?

1. People, Skills and Employment

4. Business Environment

The WMIS recognises that too many of our communities don't enjoy the access to jobs, skills and support for enterprise that they should, and face entrenched structural issues creating a confluence of poor economic, social and health outcomes.

One of its aims is to explore opportunities to accelerate the use of data and innovative processes and products in the construction industry – enhancing process innovation via modern methods of construction, building information modelling and modular build. Incorporating innovation in houses as they are being built, working with housing associations and other providers.



7. Delivering the Strategy and Action Plan

7.1 Action Plan

The action plan below sets out the actions that SDC will undertake in order to deliver the objectives and achieve the aim of this strategy 'to help facilitate increased economic growth in the District by 2023'.

The role of SDC is primarily as an enabler to help facilitate economic growth (i.e. indirect involvement). It is considered that SDC has four roles to play to deliver growth:

- Infrastructure and transformation
- Business engagement – Key Account Management
- Business support – in house and commissioned
- Strategic Review - actions

Notwithstanding this, SoADC is keen to explore ways in which it can itself invest in the District (i.e. direct involvement). As such, a fifth role has been identified:

- Commercialisation – partnerships, companies and joint ventures



7.2 Achieving the Vision and Aims

SDC recognises that it cannot achieve its vision and aims without working with its partners at the local, sub-regional and regional levels as described in Chapter 1 above.

The ultimate test of whether this strategy has been successful is not whether the individual actions and objectives have been accomplished but whether the overall aim itself has achieved. The purpose of this strategy is to add value over the short term; to create additionalities that may not otherwise have been achieved – otherwise why prepare a strategy. In order to know whether the strategy has been a success, it is necessary to forecast the likely size of the economy in 2031 (the end date of this strategy). These forecasts will also need to be benchmarked against other areas in order to check their validity (i.e. the strategy may have worked but the forecast may have been wrong).

There are a number of key players that operate in Stratford-on-Avon District that by virtue of their role or size of their business operations will be instrumental in helping to achieving the aim of this strategy.



7.3 Role of Stratford-on-Avon District Council

SDC provides a range of statutory and discretionary services to residents and businesses with service delivery tested with reference to frequent consultation via various stakeholder consultations and citizen's panels. SDC has a vital role to play as an enabler in initiatives rather than providing direct funding. Despite further reductions in central Government grant and greater reliance on the ability to raise funds locally via the devolution of business rates, there is strong support for further spending with 55% of residents identifying it as the second highest priority³⁷. In terms of the role that SDC plays, services include:

- *Supporting businesses and economic development including co-ordinating cultural events*
- *Co-ordination of infrastructure provision including through the Community Infrastructure Levy (CIL)*
- *Setting and administering the framework for development, including allocating land for development through its Core Strategy and local plans*
- *Ensuring that the right type and tenure of housing is delivered via the Housing Strategy and Affordable Housing Enabling Programme*

SDC is already progressing a number of projects with partners to assist economic growth. This strategy not only seeks to co-ordinate those efforts but ultimately to build on those successes.

Business Survey 2018

As part of its current Corporate Strategy, one of the District Council's key objectives is to support a 'flourishing local economy'. To help shape and support this, the Council conducts a biennial Business Survey so that it can better understand the state of business in the District and the needs of the business community.

This survey was used to obtain the views of business to influence, shape and inform the development and delivery of current and future plans and strategies, especially this Strategy. The survey asked how can the area can be improved to assist business and the economy and the results were as follows:

	2011 %	2013 %	2016 %	2018 %
Reduce business rates & other charges	81	79	68	49
Improve the road network	29	27	43	42
Improve broadband connections	28	42	43	41
More available parking spaces	-	-	-	37
Improve public transport	34	27	31	29
Reduce parking charges	-	-	37	27
Provide more business support & advice	-	-	13	22
Improve local environment	22	17	13	11
Provide more housing	18	18	12	11
Provide more employment land	11	10	11	11
Improve training & skills	15	12	10	10
Provide more business advice	14	9	8	7
Other	14	15	9	8
Base:	(901)	(852)	(856)	(797)

³⁷ Citizens Panel - Jan/Feb 2018

Coventry and Warwickshire Employment Land and Market Signals Study

The Coventry and Warwickshire local authorities and the LEP, have commissioned consultants to undertake an Employment Land and Market Signals Study for the sub-region to assess the current and likely future demands of businesses for employment land and understand how the current and anticipated future supply of employment land meets the needs of the market in terms of quality and affordability. The findings will be used to inform plan and policy-making to assist with the delivery of adopted and emerging plans as well as assist with the determination of planning applications.

West Midlands Major Investment Sites Study

In September 2015 the West Midlands Strategic Sites Study was prepared to consider the legacy of major regional inward investment sites in the West Midlands. The study looked at various sectors and typologies of different large sites for different employment purposes, including office, industrial and distribution and found that the regional provision still fell short of likely requirements. In light of this, the three West Midlands Local Enterprise Partnerships (LEPs), namely Coventry and Warwickshire, Greater Birmingham and Solihull, and the Black Country along with Staffordshire County Council are commissioning further work to identify current requirements and the broad locations for the large sites suitable for inward investment.



7.4 Key Players: Local

Town and Parish Councils

Town and Parish Councils work towards improving community well-being and providing better services. Their activities fall into three main categories: representing the local community; delivering services to meet local needs; striving to improve quality of life and community well-being.

Town and Parish Councils also have a key role to play in local Neighbourhood planning. They have now been empowered to prepare Neighbourhood Development Plans for their local area. SDC fully supports this tier of grassroots planning. Subject to their being consistent with the strategic principles set in the Core Strategy, Neighbourhood Development Plans enable local communities to identify further development opportunities to meet their own particular local challenges.

Stratford-upon-Avon Town Trust

The Town Trusts awards almost £2million each year to support charities, organisations, projects, events, groups, clubs, schools and individuals across Stratford-upon-Avon. Its mission is to enhance the quality of life of the people living in Stratford-upon-Avon and contributes to making Stratford on Avon an attractive place to live. Although focussed on supporting residents it does support projects which enhance the appearance and facilities offered in the Town which have wider benefits.

Stratforward

On April 2nd 2009, the Stratforward Business Improvement District was given the go-ahead by local businesses. Stratforward is charged with delivering a comprehensive marketing strategy; to increase and develop events and festivals; operating the Town Host programme; the introduction of new street entertainment, as well as offering a range of business support initiatives. Stratforward has a five year minimum project life span and collects and manages a budget, in excess of £1.75million. This is used to achieve the company's key objective: *Bring more people into Stratford town centre, make them stay longer, spend more and leave happy.* Stratforward have been reappointed for a further five years.



7.5 Key Players: Sub-regional

Coventry and Warwickshire Local Enterprise Partnership

SDC is a member of the Coventry and Warwickshire Local Enterprise Partnership (LEP); an alliance of private and public sector organisations working towards a common, shared purpose to grow the local economy, attract new jobs and investment, and increase prosperity.

Published in March 2014 and updated in 2016, the Strategic Economic Plan (SEP) presents CWLEP's vision for the sub-region as a recognised global hub in the advanced manufacturing and engineering (and associated) sectors, with business and research links across the world. The LEP economic strategy is based on five strategic pillars to focus investment around clear priorities, including:

1. Unlocking our growth potential

Ensuring the availability of appropriate employment sites to allow existing businesses to grow and to attract inward investment.

2. Advanced Manufacturing and Engineering

Coventry and Warwickshire will be globally regarded as a centre of excellence with a strong and innovative business and R&D base and highly skilled flexible workforce.

3. Growing our SMEs

Building on the work of Coventry and Warwickshire Growth Hub to enable business development through providing information, diagnostics, and brokerage services and ensuring a strong support infrastructure is in place to address barriers to business growth.

4. Growing our talent

Enhancing the productivity and competitiveness of our wider base and increasing employment opportunities by supporting the development of new business start ups, increasing business resilience and improving the skills levels of residents.

5. Culture and Tourism

An essential element of Shakespeare's England and the wider Coventry and Warwickshire economy. Improvements to the local tourism infrastructure will help to grow the sector.



Discover more about the Coventry and Warwickshire LEP @ www.cwlep.com/about

Warwickshire County Council

Warwickshire County Council provide 'upper tier' public services for Stratford-on-Avon District including highways, public transport and social care. Through their Economic and Inward Investment Team they also provide economic development support to businesses as well as business insight and intelligence. They have also produced a document entitled Public Health Evidence for Planning and Developers. This document recognises how health impacts on economic development in a number of ways for example,

- Poor mental health and wellbeing can lead to lower resilience, higher rates of absenteeism and lower productivity;
- If people are physically unwell they may be unable to work and an ill workforce could result in low productivity or stunt economic growth

It is important that for a strong economy health and wellbeing are addressed and that ill mental and physical health are prevented where possible.



Discover more about WCC Inward Investment Team @ www.warwickshire.gov.uk/invest
Tel. 01926 412140

Coventry and Warwickshire Chamber of Commerce

The Chamber network represents 75,000 businesses and 6 million employees and provides access to a range of money-saving services, effective business support and, networking opportunities to raise the profile of individual companies and start bringing in the business. It plays a key role in bridging the gap between educators and business by highlighting the skills employers need and influencing education policy to ensure they're delivered effectively. The South Warwickshire branch committee meets every quarter to examine issues affecting businesses in Stratford on Avon, and Alcester, with a satellite office in Shipston on Stour. It maintains close collaboration with businesses and local stakeholders, including the Local Enterprise Partnership (LEP), MPs and other business groups, ensuring issues that matter are raised at all levels.



Discover more about Coventry and Warwickshire Chamber of Commerce @
www.cw-chamber.co.uk/ Tel. 02476 654321

Federation of Small Businesses(FSB)

FSB is the UK's leading business organisation in terms of promoting the interests of the self-employed and those who run their own business across Stratford- on- Avon District and the local surrounding areas.



Discover more about FSB @ www.fsb.org.uk/ Tel. 0808 20 20 888

7.6 Key Players: Regional

West Midlands Combined Authority

SDC is a non-constituent member of the West Midlands Combined Authority (WMCA); a partnership of 18 local authorities and four Local Enterprise Partnerships (LEPs), with an elected Mayor, working together to utilise devolved powers to collaboratively deliver on a range of projects to achieve its vision for a more prosperous West Midlands. The WMCA has also prepared a Strategic Economic Plan (SEP) to set out how it will invest £8bn in its 30 year investment programme.



Discover more about WMCA and the SEP @ www.wmca.org.uk

Midlands Engine

Sitting at the heart of the UK economy from Lincolnshire to Shropshire, the east and west midlands together form the Midlands Engine home to over 10 million people and 800,000 large and small businesses. It is a coalition of Councils, Combined Authorities, Local Enterprise Partnerships (LEP), Universities and businesses across the region, actively working with Government to build a collective identity, to enable us to present the Midlands as a competitive and compelling offer that is attractive at home and overseas.



Discover more about the Midlands Engine @ www.midlandsengine.org.uk

Midlands Connect

Midlands Connect is a partnership of 23 Local Authorities, nine Local Enterprise Partnerships, the Chambers of Commerce, Highways England, HS2 Ltd, Network Rail, and the Department for Transport tasked to deliver the enhanced connectivity required to power the Midlands Engine as a hub of the national transport network; driving economic growth, trade and productivity.



Discover more about the Midlands Connect and its Transport Strategy @ www.midlandsconnect.uk

7.7 Monitoring and Review

The Action Plan will be monitored annually in order to track progress of the actions against each objective. A simple red-amber-green (RAG) assessment will be used:

- Red – action has not been commenced and/or high risk of action not being achieved
- Amber – progress is being made towards achieving the action
- Green – action has been achieved

Monitoring will also provide the opportunity, if necessary to review specific objectives and actions as well as, if appropriate, include new objectives and actions. The strategy as a whole will be reviewed by 2023 and if required an amended strategy will be put in place for the subsequent 5 years. There will therefore be an annual review of the action plan and a five year review of the Strategy.



Aim 1: The best place to start and grow a business

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
1. To address polarisation of the workforce	Identify middle-skilled jobs and how they fit with the economic profile of the District	To re-balance the jobs market	SDC WCC CWLEP	n/a	July 2019	Better understanding of what types of jobs can be provided to achieve desired outcome	High	2. Advanced Manufacturing and Engineering 4. Growing our talent	
2. To improve broadband connectivity	Explore the potential for wireless provision with third party suppliers	Providing wired broadband in rural areas is expensive more cost effective alternatives should be explored to ensure maximum coverage of superfast broadband	SDC Broadband suppliers- BT, Sky etc Coventry Solihull Warwickshire (CSW) Broadband project Government CWLEP	?	ongoing	% of dwellings with access to superfast broadband	Funding Technical rural district	1. Unlocking our growth potential 3. Growing our SME	1. Unlocking our growth potential 3. Growing our SME
3. To improve access to finance	Investigate provision of loans or grant-funding	To assist businesses with moving to next stage of growth	SDC CWLEP WCC	Additional budgets required	2019	Increase in number of existing businesses growing	Businesses fail despite cash injection	3. Growing our SME	
3. Encourage business growth in new sectors- growing high quality, high value jobs within growing sectors of the future	To consider establishment of a joint working party with Warwick University to explore and define new opportunities	To ensure potential for innovation and growth is maximised	Warwick University SDC WCC	n/a	ongoing	Partnership formed Retention of graduates in District	Low	1. Unlocking our growth potential	Inception meeting held and TOR being prepared
3. Encourage business growth in new sectors- growing high quality, high value jobs within growing sectors of the future	To explore the possibility of joint working with tourism organisations to articulate plans and marketing for the global brand of Shakespeare	To ensure 'joined up thinking' takes place to concentrate efforts to attract inward overseas investment and foster good relations	SDC WCC RCS Birthplace Trust Stratford The School Room Stratford Town Trust Growth Hub	TBC	ongoing	Terms of reference prepared Group meeting regularly Branding agreed	Low	1. Unlocking our growth potential	Inception meeting held and TOR being prepared

Aim 2: Prosperous communities

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
4. To enhance the High Streets	Undertake annual shopfront surveys of Stratford-upon-Avon and the 8 Main Rural Centres	Create a comprehensive record of high street retail activity enabling trend analysis	SDC	Existing resources within the Policy Team	July/ August (annual)	Shopfront survey for SUA and each MRC compiled annually	Minimal. Dependent upon staffing resources but not considered overly onerous	5. Culture and Tourism	Annual surveys underway
4. To enhance the High Streets	Explore potential for business rate relief	To reduce the overheads for retailers	SDC	Additional budgets required	2019	Reduction in retail closures measured against trend	Relief may be insufficient to prevent losses	3. Growing our SME	
4. To enhance the High Streets	Town centre health check to closely monitor the types of uses that are being lost. Also monitor retail uses in other local centres. Consider Policy in CS Review to deal with loss of A1 uses if necessary	To understand and quantify changes in uses in TC and monitor health of TC.	SDC	Existing resources within the Policy Team	Annually	Identifying trends on which to base future policy	None identified	5. Culture and Tourism	
4. To enhance the High Streets	Appoint Town Centre Manager/champion	To Champion the TC Policy TC 1 of SADC NDP <ul style="list-style-type: none"> Improving the perception and image of the town; Improving the visitor experience; Supporting independent businesses; Liaising with established retailers to encourage the desired mix of retailers; Further developing a markets policy to include an entrepreneurs' market; Advocacy and administration of parking and traffic policies; Improving the pedestrian and cyclist experience in accordance with Policy CLW5 and TC Project 5; Shopmobility; Building on the recognised contribution that creative industries make to the town's prosperity; and Enhancing the overall appearance of the town and public realm including pedestrian and vehicle signage 	SDC Stratford Town Council	TBC	2019	Town Centre Manager/champion appointed	None identified	5. Culture and Tourism	

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
4. To enhance the High Streets	SDC to bid for funds for Town Centres at National and Regional levels, such as from WMCA pilot study	To understand how town centres can evolve to stay relevant to residents needs in the future and increase prosperity and well being	SDC WMCA CWLEP MCHLG	TBC	ongoing	The implementation of pilot schemes to create successful Town Centres for future needs from which lessons can be learnt for the future of other Town Centres.	Funding	1. Unlocking our growth potential	
5. To address highway congestion and transport infrastructure	Seek improvements and upgrading of the A46	To provide improved journey times on the strategic road network	SDC WCC Developers	Government Private sector CIL	ongoing	Decrease in congestion	Funding	1. Unlocking our growth potential	
5. To address highway congestion and transport infrastructure	Reduce congestion on the A435	To provide improved journey times, reduce congestion and improve the environmental quality of Studley and Mappleborough Green	SDC WCC	CIL Private sector	ongoing	Decrease in congestion	High	1. Unlocking our growth potential	
5. To address highway congestion and transport infrastructure	Facilitate/ support implementation of SWRR	To contribute to reducing congestion by providing a relief road to Stratford- upon- Avon and serve LMA facilitating delivery of 3,100 dwellings	SDC LMA	CIL Private sector	2022?	Decrease in congestion and construction of 3100 at LMA	Medium	1. Unlocking our growth potential	Planning application submitted
5. To address highway congestion and transport infrastructure	Seek improvements to rail services to/ from Stratford- upon- Avon such as increasing frequency and later night time train services	To provide viable alternatives to the private car and improved connectivity to London, Birmingham and Birmingham International Airport	SDC WCC West Midlands Trains Chiltern Railways Network Rail Midlands Connect	CIL Private sector Network Rail		Improvements in service i.e. journey times and frequency	High	1. Unlocking our growth potential	
5. To address highway congestion and transport infrastructure	Discuss with WCC about bus provision to see what action SDC can take	To provide viable alternatives to the private car	WCC SDC Bus companies	Bus companies	ongoing	Less use of private car	Medium Viability issues	1. Unlocking our growth potential	

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
6. To improve energy supply	To lobby and liaise with the energy sector on behalf of businesses	To ensure that power supplies do not hinder economic growth	SDC WCC	n/a	July 2019	Positive feedback from businesses RE power supplies	Risks for SDC RE action are low. Risks of failing to achieve tangible outcome high given complexity of the issue	1. Unlocking our growth potential	
6. To improve energy supply	To encourage the growth of low-carbon technologies and the efficient use of resources	To ensure future energy resilience	SDC WCC Energy sector National Grid Act on energy warwickshire	Central Gov't? Private sector	ongoing	Improvements in air quality Improvements in health	Viability arguments	1. Unlocking our growth potential	
6. To improve energy supply	Establishment of a political Champion for Energy	To ensure awareness of issues is maintained and encouraged in developments at an early stage rather than expensive and prohibitive retrofitting	SDC	Existing resources in SDC	ongoing	Increase in low-carbon technology schemes	None identified	1. Unlocking our growth potential	
6. To improve energy supply	Investigate the possibility of setting up a company to provide an income stream from the District Heating network	To profit from use of low energy technology To show commitment to saving energy and innovative DC	SDC C&RT Private sector	Depends on outcome of feasibility study	ongoing	To profit from use of low energy technology to enable other schemes to be initiated	Skilling	1. Unlocking our growth potential	Canal Quarter District Heating Feasibility study already underway

Aim 3: Good jobs and greater earning power

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
7. To address affordability of homes	Ensure that the Core Strategy housing requirements are met	Increasing housing supply should temper house price increases ³⁸	SoADC Private Housebuilders Housing Associations	n/a	31 August (annual)	Target achieved (see AMR)	Medium – SDC has achieved record levels of housing in recent years but delivery is dependent on private housebuilders	1. Unlocking our growth potential	
7. To address affordability of homes	Encouraging more churn in the housing market for example explore feasibility of financial incentives for residents to downsize	To contribute to housing supply and efficiencies in housing market	SDC	n/a	2020	Smaller homes becoming available and young people more able to obtain local housing	High-controversial	1. Unlocking our growth potential	
7. To address affordability of homes	To provide homes that those on lower incomes can afford to buy and/or rent	Increasing the supply of affordable homes could, for example, provide accommodation for young people to enable them to live and work within the District, decreasing commuting costs and providing resilience in the future labour market	SDC Private Housebuilders Housing Associations	Most affordable homes are nil-grant funded	31 August (annual)	Target achieved (see AMR)	Medium – SDC has achieved record levels of housing in recent years but delivery is dependent on private housebuilders	1. Unlocking our growth potential	
7. To address affordability of homes	Carry out a strategic housing market assessment	To speed up finalisation of S106 agreements and hence planning process	SDC CWLEP	?	ongoing	Up to date Strategic Housing Market Assessment	Low but potentially long term	1. Unlocking our growth potential	

³⁸ However affordability issues are so entrenched that an increased market housing supply in and of itself won't radically improve housing affordability certainly in the short to medium term.

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
8. To address skills shortages	AUTOMOTIVE To carry out research to understand labour market risks in order to take action to future-proof the workforce	To increase resilience in labour market and maintain high employment rates	SDC CWLEP	Additional budgets required	ongoing	Low unemployment rate	High number of jobs involved and supply chains	4. Growing our talent	
8. To address skills shortages	AUTOMOTIVE Continue discussions with industry leaders to understand issues and ascertain where SDC can assist	To ensure SoADC is kept abreast of issues so that it remains an effective partner	SDC	Existing resources within the Policy Team	ongoing	Resolution of issues	External influences	3. Growing our SME	
8. To address skills shortages	Facilitate better liaison between business and 6th Form Schools and colleges	To ensure that young people have the skills to match the jobs	SDC WCC CWLEP Education Institutions Businesses	?	July 2019	Improved results in the Economic Survey in respect of skill shortage (currently 1 in 3)	Low build on work already being undertaken	1. Unlocking our growth potential	
8. To address skills shortages	SDC to investigate helping to facilitate educative awareness sessions or workshops regarding digital skills and what technology can do	To ensure that the opportunities that new technology offers is embraced for greater efficiencies and competitiveness	SDC Business Forum Businesses	Policy Team	ongoing	Greater use of new technology and greater efficiencies and competitiveness	Low	1. Unlocking our growth potential	
8. To address skills shortages	Measures to be investigated to raise awareness of Collaborate to Train and Business Ready	Connect skilled people with opportunities in business and in make it easier for business to find the right route into HE and FE	SDC CC Warwick University	European Social Fund	ongoing	Business accessing correct skills	Low	1. Unlocking our growth potential	
9. To focus on service sector employment and the young	Encourage more apprenticeships in tourism and retail industry or management training schemes such as that implemented by Marks and Spencer	To counteract low wage issues in the retail sector and discourage turnover of temporary staff	Town Centre Manager? Retail sector	Retail sector	ongoing	Higher wages paid and less turnover of staff	High	5. Culture and Tourism	

Objective (What)	Action/Priority (How)	Purpose (Why)	Actor (Who)	Funding	Target (When)	Success Measure (Outcome)	Risk	CWSEP 'Pillars'	Progress
10. To support and strengthen the rural economy	Consider establishment of a business hub (rural?)	To assist with business growth and to encourage entrepreneurial activity to flourish	SDC CWLEP WCC Growth Deals	Additional budgets required	2020	Increase in new businesses	High death rate of new companies	4. Growing our talent	
10. To support and strengthen the rural economy	AGRICULTURE Continue to support diversification	To encourage resilience in this sector	SDC Farming community	Farming community Government?	ongoing	Thriving farming industry	Medium	4. Growing our talent	
10. To support and strengthen the rural economy	Explore the feasibility of declaring enterprise zones in the rural area	To boost the rural economy	SDC CWLEP	?	2020	Establishment of rural enterprise zone	Medium	4. Growing our talent	
10. To support and strengthen the rural economy	Support more apprenticeships in rural areas	To ensure farming industry survives and attracts new farmers	Education Institutions Farming community	?	ongoing	Thriving farming industry	Medium	4. Growing our talent	
10. To support and strengthen the rural economy	Increased liaison with the farming Industry to identify challenges and potential solutions	To ensure support is given wherever possible to support the farming industry	SDC NFU	n/a	ongoing	Thriving farming industry	Low	1. Unlocking our growth potential	
10. To support and strengthen the rural economy	Liaise with Shakespeare England about the role of smaller towns to strengthen their tourism offer/ Shakespeare branding	To boost the rural economy	District/Town/ Parish Councils	n/a	ongoing	Increased visitor numbers in rural centres due to increased marketing and enhanced visitor experiences	Low	1. Unlocking our growth potential	

