Warwickshire in 2025

August 2019

Warwickshire
County Council

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Key Messages

- A growing number of households, residents and employees in Warwickshire will increase demand on infrastructure (e.g roads, schools, social housing) and services (e.g social care, waste management).

- An ageing population who are living an increasing number of their later years in poor health will impact on health and social care services. This will also mean increased caring responsibilities for family members and for those without support networks a risk of loneliness and social isolation.

- The prevalence of disability will grow as a result of the rising number of people living into old age. Dementia, diabetes, musculoskeletal diseases and mental ill health are all areas that are likely to have greater impact on health services. Levels of overweight and obesity in young people will continue to cause concern.

- The local economy will continue to grow but an estimated decrease in the working age population in Warwickshire could lead to more in-commuting putting pressure on local transport networks. Recruitment difficulties due to a skills and labour shortage may be compounded.

- Advances in digital technology will enable improved ability to connect with more customers on-line and to deliver more services digitally. The Internet of Things could allow greater insight into people, services and processes in Warwickshire by collecting data and monitoring activity.

- Warwickshire roads will become busier potentially resulting in more congestion on the roads and reduced air quality. Developments in self-driving cars and trucks, and improved battery technology leading to more electric or hybrid cars may offer solutions.

- The focus of services to tackle crime will continue to need a greater emphasis on crime that is enabled by technology. This includes cyber crime but also exploitation of young people where mobile devices are used for communication.

- By 2025 it is expected that the quantity of waste being managed will have increased due to housing and business growth. However, Government proposals could radically change the way waste is managed across the country. It is likely that more material will be recycled or composted, and less material will be disposed of. In addition, the way that people manage their waste may also change significantly.

- By 2025 action on climate change will be advancing and include measures such as better insulation of buildings, less use of fossil fuels, more use of green electricity, local schemes to generate electricity and offsetting of carbon through initiatives like tree planting. Measures to cope with the impact of existing changes in the climate will be developing and being actioned.

Population

By 2025 it is estimated that there will be **579,095** residents in Warwickshire, a 1.4% increase in the population compared to the 2018 mid-year estimate of 571,010 residents[1,2]. The main reason for this increase is internal migration (moves within England). The projections take no account of local development aims, policies on growth, capacity to accommodate population change, or economic factors that could impact the population in the future. Given the plan for extra housing and employment in Warwickshire (see Housing & Economy sections below) this may be an underestimate.

Based on the ONS projections by 2025:

- there will be an estimated **93,550** school age children, this is a **3.0% (2,719) increase** on the 2018 mid-year population of 4 to 17 year olds. This will increase the demand for nursery and school places and services that support the needs of children (e.g school health service, children's social services, Children and Family Centres, CAMHs). Conversely, there is estimated to be a **3% decrease** in 0-3 year olds in this time period (from 25,097 in 2018 to 24,232 in 2025).
- the number of 16-64 year olds (i.e the working age population) in Warwickshire will **decrease** by an estimated **5,436** people between 2018 and 2025, a **1.6% reduction** in the potential workforce.
- it is estimated that **17.1%** of the population in Warwickshire (98,964 people) will be **70 years or older** and **3.3%** will be **85 years or older** (19,332 people). This is **an increase of 12,435 (14.4%) 70+ year olds and 3,528 (22.3%) 85+ year olds** in the county compared to the estimated numbers in 2018. This ageing population will have an impact on demand for health and social care services.

In 2025, there will be an estimated **72 dependents** (those aged 0-16 and 65+) **to every 100 adults of working age**. In 2017, there were 66 dependents for every 100 adults. A higher ratio of dependents indicates more financial stress on working people, increased caring responsibilities and increased demand on health and social care services. However, as more people are working beyond 65 the impact by 2025 could be marginal. Nationally in 2018, the male average age exit from the labour market was 65.1 years old, the female average age of exit was 63.9 years old. In Warwickshire in 2018/19 just over 11% of people aged 65+ were in employment.

The 2011 census found that 88,500 people commuted into Warwickshire for work, which accounted for **34.7%** of the total number of people employed in the county[3]. This is likely to have increased since 2011 due to Warwickshire's levels of economic growth and will continue increasing given expectations for employment growth. The substantial in-commuting impacts on the day time population of Warwickshire and needs to be factored into infrastructure and service planning.

Warwickshire has an increasingly diverse population - in 2018, **11.7%** of the population were born outside of the United Kingdom[4]. Of these just over **50%** were born in the European Union, **22%** in South Asia and **11%** in Sub-Saharan Africa.

The number of people moving into Warwickshire from outside the UK is estimated to be between **2,600 - 2,900** each year between now and 2025[1]. Taking into account emigration, it is estimated that net International Migration will account for between **500-700 of the extra residents** in Warwickshire each year to 2025.

In 2011, **4%** of Warwickshire residents did not have English as a main language, additionally more than **70** different languages were used as a first language[5]. Although there is no recent published data on the main language of the population in Warwickshire, it is likely that the percentage not speaking English as their main language has increased. School census data in January 2018 showed that **9.6%** of children aged 4 to 19 years attending State funded schools in Warwickshire spoke a language other than English as their first language (EAL)[6]. Overall, Warwickshire's EAL population in schools has **increased by 39%** since 2011, from 4,764 pupils in 2011 to **7,761** pupils in 2018.

Looking at population data at a district/borough level shows that the most growth in the population between 2018 and 2025 is projected to take place in Rugby Borough followed by Nuneaton & Bedworth Borough.The population is Stratford-on-Avon District is likely to reduce. Looking at population data at a district/borough level between 2018 and 2025[1,2]:

- the most growth is projected to take place in Rugby Borough followed by Nuneaton & Bedworth Borough. The population in Stratford-on-Avon District is likely to decline.
- Warwick District is the only district/borough where the population of 0-3 year olds is expected to increase. Whereas the school aged population (4-17 year olds) is expected to increase in Rugby and Nuneaton & Bedworth, and marginally in Warwick.
- The working-aged population is projected to decrease in Stratford-on-Avon, North Warwickshire and Warwick.
- In all districts and boroughs the population aged 70 and over is projected to increase; as is the population aged 85 and over.

District/ Borough	Age groups (numbers projected for 2025 & percentage change from 2018 estimates)					
	All	0-3	4-17	16-64	70+	85+
North Warwickshire	64,973 0.2% ⇧	651 -4.3% ⇩	690 -0.1% ⇩	930 -3.9% ⇩	711 15.8% ⇧	334 27.7% ⇧
Nuneaton & Bedworth	132,457 2.8% ⇧	1,556 -4.2% ⇩	1,607 5.2% ⇧	1,644 0.1% ⇧	1,342 16.0% ⇧	565 20.4% ⇧
Rugby	111,969 4.5% ⇧	1,279 -3.9% ⇩	1,560 8.1% ⇧	1,349 2.2% ⇧	1,016 14.7% ⇧	501 26.4% ⇧
Stratford-on-Avon	126,704 -0.7% ⇩	1,173 -7.4% ⇩	1,508 -0.6% ⇩	1,852 -5.3% ⇩	1,524 15.0% ⇧	828 28.3% ⇧
Warwick	142,992 0.4% ⇧	1,499 1.4% ⇧	1,592 0.9% ⇧	1,654 -1.6% ⇩	1,267 11.1% ⇧	655 11.8% ⇧

Housing

ONS projections suggest that by 2025 there will be **250,132** households in Warwickshire[7]. This would represent a rise of almost 10,000 homes or **4.1%** from the 2016-based household projection estimate of 240,230 in 2018. At a district and borough level the largest increase in households between 2018 and 2025 is projected to be in Rugby Borough:

Change in households	North Warwickshire	Nuneaton & Bedworth	Rugby	Stratford on Avon	Warwick
Number	1,067	2,315	2,498	2,190	1,832
% change	4.0%	4.2%	5.6%	4.0%	3.1%

ONS household projections are based on past demographic trends, they take no account of local development aims, policies on growth and changes in the stock of dwellings and communal establishments (e.g new builds). Given that Neighbourhood Plans include proposals for around **56,000** extra houses in Warwickshire up to 2033 it is likely that the number of households in, and the population of Warwickshire will be greater than estimated by 2025.

Local plan figures for the number of new dwellings in each borough and district for 2011-2031 are as follows[8]:

North Warwickshire	Nuneaton & Bedworth	Rugby	Stratford on Avon	Warwick
10,222	10,274	13,583	10,482	11,625

Areas within the boroughs and districts where major developments (1,000+ dwellings) are planned are:
- North Warwickshire Borough: land to east of Polesworth & Dordon (2,000 dwellings); land at Whittington Farm, Atherstone (1,282 dwellings); land west of Robeys Lane, Tamworth (1,270 dwellings) Tamworth Golf Club (1,100)
- Nuneaton & Bedworth Borough: land North of Nuneaton (3,331 dwellings), Arbury (1,525 dwellings)
- Rugby: Rugby Radio Station (6,200 dwellings); Eden Park (1,300 dwellings);
- Stratford on Avon: Long Marston Airfield (Phase 1) (2,100 dwellings); land at Gaydon/Lighthorne Heath (1,410 dwellings).
- Warwick: Grove Farm - Grove Farm, Harbury Lane, Bishops Tachbrook (1,820 dwellings); land at Kings Hill Lane (1,800 dwellings)

In 2016, **31%** of Warwickshire households were headed by someone aged 65 or over[7]. This is estimated to increase by 2025 (by 2041 estimates suggest 40% of households will be headed by someone aged 65 or over).

The composition of households is also likely to change by 2025 with fewer persons per household. The average household size in 2016 was 2.32 persons, this is estimated to reduce to 2.27 persons by 2026.

Demand for housing will increase. By 2025, **25%** of all households will privately rent with the largest increase among those aged 20 to 39. An increase in requirement for private rented properties is likely to lead to issues with rent levels, security of tenure and quality, particularly for vulnerable groups.

In the social rented sector, those living in the most deprived areas will see a reduction in income, year on year, which is likely to be a direct result from the impact of welfare reform.

In Warwickshire the rate of statutory homelessness per 1,000 households has steadily increased over the past few years and in 2017/18 was higher than the rate in England (3 per 1,000)[9]. Nationally homelessness temporary accommodation placements and Bed & Breakfast use have continued to rise. WCC is committed to working with District and Boroughs, Health and Social Care colleagues, the Police and Probation services and the third sector through Warwickshire's first countywide homelessness strategic group. This group has been established to write the first countywide strategy on Tackling and Preventing Homelessness.

Economy

Overall, employment growth in Warwickshire is expected to increase by 2.4% (7,800 + jobs) between 2017 and 2025[10]. Based on population estimates, this would result in a mismatch between job growth and the resident workforce, which is likely to lead to pressure on housing and the transport network (through in-commuting).

The industries employing the most people in Warwickshire in 2017 were manufacturing (35,000); health (31,000); professional, scientific & technical (28,000); retail (25,000); business administration & support services (23,000); and accommodation & food services (23,000)[11]. It is anticipated that Warwickshire will see its largest employment growth by 2025 in its real estate (12.2%), electronics (10.6%), head offices and management consultancy (10.6%) and food & beverage (10.2%) industries[10].

In terms of employment numbers, in 2025, it is expected that the business administration and support services, retail, education, construction and the logistics sector will employ the most people. The growth in the number of caring personal services is expected to be the largest amongst all the occupations in Warwickshire between 2017-2025, followed by sales assistants, cleaning occupations and vehicle trades.

The location quotient (LQ) is a way of quantifying how concentrated a particular industry is in a region compared to the nation. In Warwickshire this is currently highest for the motor vehicle manufacturing industry. By 2025 this is still expected to be Warwickshire's most competitive and concentrated industry and the occupations with the highest LQ will also be linked to the manufacture of motor vehicles, including assemblers and routine operatives, vehicle trades and metal machining.

Across districts and boroughs, in 2025, Warwick District is expected to have a particularly strong presence in the electricity and machinery repair and installation industries, focusing on services; Stratford-On-Avon District, has strength in the manufacture of motor vehicles, and other manufacturing; Rugby Borough is likely to have an above national focus on its manufacturing, postal and scientific research industries; Nuneaton & Bedworth Borough are forecast to be prominent in postal and wholesale activities, thriving in the logistic industry; and North Warwickshire Borough is expected to have a high concentration of workers throughout their manufacturing activities and warehousing.

The place-based joint strategic needs assessments have through stakeholder engagement identified some gaps between the skills present in the local labour market and the employment opportunities that are available, particularly in the north of the County[12]. This is corroborated by recent surveys of businesses which suggest two-thirds are experiencing recruitment difficulties due to skills and labour shortages. Research by Warwick University on the changing labour market suggests a shift to an increased requirement for higher level skills (particularly first degree and Master's levels) for new and replacement jobs. This highlights the importance of high skills levels in the future economy and the need to plan for this locally. One potential impact is that due to a higher than average proportion of workers in transport and logistics, manufacturing trades and leisure services occupations, all industries with a high risk of automation, a lack of workers and skills shortages may well accelerate uptake of automated processes in local industrial sectors.

An increase in the older population has implications for the economy in terms of providing services and state pensions; however, this economic impact will be affected by people working until later in life and therefore continuing to contribute economically.

Social Care

There were 731 Children Looked After (CLA) in Warwickshire in December 2018. Although there is a drive to decrease the number of CLA, by 2025 it is expected that numbers will have increased reflecting population increases and national trends[13].

In 2018/19, 9,923 adults (2.2% of the population aged 18 and over) received a WCC-commissioned social care service[14]. Due to an increasing ageing population the demands on adult social care is likely to increase by 2025, particularly in areas where the population is less wealthy. Estimates suggest that in Warwickshire in 2025 approximately **4,309** people aged 65 and over will

be living in a care home (both LA and non-LA) with or without nursing, an increase of **19.7%** from 2019 estimates[15].

By 2020 more than **2,790** Priority Families will have been identified and attached to the Warwickshire programme[16]. It is expected that at least 75% of the target of 2,790 families will see sustained and significant progress in relation to the issues that they face and will be successful payment by results claims (an estimated 2,100 families). The programme is due to end in 2020 with the focus now on aligning and embedding this work across Children and Families services to ensure its sustainability post-2020.

Carers will continue to play a significant role in delivering aspects of social and personal care. In 2018/19, there were **3,645 carers** (aged 18 and over) in Warwickshire who were assessed and/or received some level of support from WCC[17]. However there are many more carers providing varying amounts of care - the 2011 Census suggested **12,452** residents provided substantial unpaid care in a week (50+ hours) whilst a further **46,788** provided some unpaid care (1-49 hours)[18]. This number is likely to increase by 2025 if national trends are replicated. There is also an increasing prevalence of 'sandwich carers' – those looking after young children at the same time as caring for older parents.

In April 2019, **2,411 young carers** (0-25 year olds) were registered with Warwickshire Young Carers, of which **1,498 were aged 16 and under**[17]. The service receives an average of 360 new referrals per year which means that by 2025, there could be a further 2,160 new young carers. If these are considered with those 16 and under already registered, there would be 3,658 young carers accessing support in 2025. This number doesn't include hidden young carers, and those choosing not to register with the service - it is estimated that the service supports around 50% of Warwickshire's young carer population, so by 2025 that could be over 7,000; an increase on the current number of young carers in Warwickshire.

There will be an increased focus on working in partnership with the voluntary and community sector to support and empower communities to be strong, resilient, self-supporting and connected. Warwickshire has a thriving, diverse and independent voluntary and community sector with an estimated 10,000 organisations. In 2018/19, it was estimated that 191,000 adults in Warwickshire regularly volunteered, giving around 91,000 hours each week (46% of the 16+ population)[19]. The economic value of this volunteering is approximately £80.2 million per annum.

Crime & Community Safety

Warwickshire adults are more likely to fall victim to a cybercrime than they are to traditional crime such as being a victim of robbery or theft. The Office for National Statistics report that one in 10 adults were a victim of cybercrime in 2017 and the chance of being a victim is the same, regardless of social class or whether someone lives in a deprived or affluent, urban or rural area[20].
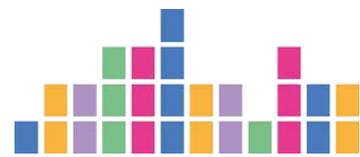
Crime in the future will likely be linked to technology in a society where all everyday devices that we use in our daily lives will be linked to the internet and will all be potentially hackable. Illegal commerce on the internet will increase, whether in the form of drugs, stolen credit cards, forging documents, and there will likely be an increase in both small and large scale hacking of websites where consumer activity will be affected. Organised crime groups are using technology more and more to commit crime.

It is recognised that criminality and demand on police resources is changing and areas which we recognise as higher harm and vulnerability are showing increases. Some of those areas which are seeing an increase in reported offences include child sexual exploitation, child abuse, organised immigration crime, county lines, cyber crime and economic crime. Historically these crimes may have been underreported and poorly understood, both nationally and locally this is now changing and Police forces are investing resources to raise levels of awareness and improve trust and confidence amongst victims to report these types of crimes.

Harassment offences will continue to increase - both verbal and written - in particular those offences using social media and email. An increase in understanding and awareness of this type of crime is resulting in more crimes being recorded. In addition, changes to Home Office recording practices in April 2018 relating to harassment, stalking, coercive behaviour and modern slavery mean that these offences are now being recorded in addition to the most serious offence. This has already contributed to dramatic rises in these offence types in Warwickshire and this trend is likely to continue at these higher levels.

Road traffic collisions remain the most frequently attended non-fire incident for Warwickshire Fire & Rescue and there is a recognised high risk to life. With an increasing population and new housing estates being developed around the county there will be more cars on the roads in future years which will increase traffic congestion, particularly around towns, and will increase the risk of accidents.

It is likely that the level of road traffic collisions will increase in the future for a number of reasons including an increase in poorly maintained vehicles being on the roads due to shrinking household budgets, and an increase in the number of vehicles on the road.

A focus for the Fire Service will be fire safety within Homes in Multiple Occupancy (HMOs) as the number of these types of properties is likely to increase, where multiple tenants that are not family members share a property. There is a current trend for offices being converted into flats in Warwickshire towns.

Technology

The increase in use of Smartphones, Tablets and the improvements in Broadband speed and coverage are changing the way people deliver and receive services. Warwickshire residents will contact Warwickshire County Council primarily via online tools (e.g. website and email).

There will be an increasing demand for digital self-help technology across all services that WCC provides, in particular for social care where digital technology has the potential to improve efficiencies and the quality of care services. Artificial intelligence and robotics will increasingly be adopted including virtual customer service assistants (chatbots) to handle basic queries

Coventry, Solihull & Warwickshire Superfast Broadband will enable rural communities to have access to the latest and fastest broadband services, with an aim for 98% coverage. The West Midlands has been selected as the preferred partner for the government's Urban Connected Communities project which will develop a large-scale, 5G pilot across the region, with a hub in Coventry[21]. 5G mobile connectivity is expected to revolutionise the digital environment, with benefits to business, public services and society; attracting investment and talent to the region. It will also provide opportunities for locally based businesses to contribute to the innovation ecosystem, and improve connectivity to support small and social enterprises particularly the digital and creative SME sector.

Internet of Things devices (connection of everyday physical objects to the internet) will increase by 2025. There will be networks of low-cost sensors and actuators for data collection, monitoring, decision making and process optimisation. Examples include smart-meter and smart-grid control of water and electricity. An example is Array of Things, a networked urban sensor project which is helping to understand the urban environment, infrastructure and activity in Chicago[22].

Generation of electricity from renewable sources will continue to increase with improvements in component technologies.

Transport

Car ownership is likely to continue to rise, placing additional pressure on local communities and infrastructure. Between 2011 and 2017 there was a rise in car ownership of 9.9% (an additional 28,700 vehicles) in Warwickshire, a figure in line with the national picture (10.0%)[23]. There was some variation within the county with Rugby borough recording a higher rate of increase (12.2%) and Warwick District recording a lower figure (7.2%).

Increased car ownership and any increases in traffic in Warwickshire linked with population and employment growth, and housing developments, could increase congestion on the roads resulting in delays and reduced air quality. There may also be an increase in the number of road traffic accidents.

The place-based joint strategic needs assessments have identified reductions in public transport as an issue, particularly in more rural areas. This can lead to loneliness and social isolation for those who don't own cars or aren't able to drive[12].

There is likely to be growth in the use of self-driving cars and trucks that can navigate and operate autonomously or semi-autonomously in many situations. In addition, battery technology is improving allowing for devices or physical systems that are better at storing energy for later use - a larger proportion cars sold in 2025 could be electric or hybrid.

Health and Wellbeing

There are variations in health outcomes within the county, and within districts and boroughs. These variations are likely to continue in 2025 although the place-based approach JSNAs are identifying variation and enabling services to be targeted at those with greatest need[12].

Life Expectancy
In Warwickshire, life expectancy at birth in 2015-2017 was **79.8 years** for men[24] and **83.7 years** for women[25]. This is a slight reduction from previous years for men. Indeed increases in life expectancy for both men and women have slowed in recent years across the country. There are thought to be many possible factors for this, including increasing rates of obesity, changes in mortality among older people such as increasing dementia, and excess winter deaths from flu. Given the trend in Warwickshire it is likely that by 2025 life expectancy will be around **80 years** for males and **84 years** for females.

Healthy Life Expectancy
Healthy life expectancy at birth is "the average number of years a person would expect to live in good health based on contemporary mortality rates and prevalence of self-reported good health". Healthy life expectancy for men in Warwickshire in 2015-2017 was 64 years, a reduction of 2.2 years from the previous period (2014-2016)[26]. If this downward trend continues healthy life expectancy could fall below 64 years by 2025. For women healthy life expectancy was 66.2 years in 2015-17 and has been at similar levels for previous periods[27]. If current trends continue by 2025 healthy life expectancy is likely to be similar in 2025.

The years between healthy life expectancy and life expectancy are known as the "window of need". This is the time that is spent in poor health, which increases pressure on health and social care services, as well as having an impact on families and workplaces. In Warwickshire for 2015-17, the "window of need" was 15.8 years for males and 17.5 years for females. By 2025, the window of need could increase for males.

Chronic diseases

By 2025, the prevalence of disability will grow as a result of the rising number of people living into old age, rather than an increase in ill-health[28]. Overall, **dementia** represents the biggest growing cause of disability and rates are predicted to increase by **17%** in people aged 65 or over in Warwickshire between 2019-2025 (from 8,484 in 2019 to 9,953 in 2025)[15]. The second largest cause will be other chronic diseases including mental health problems, diabetes, and musculoskeletal disorders. These diseases are fastest-rising in people aged over 85.

Lifestyle-related diseases

In 2017/18 almost two thirds (**62.4%**) of Warwickshire adults were classified as overweight or obese[29] and **21.6%** were physically inactive[30]. In addition, more young people are being classified as either overweight or obese. Currently almost one in three Warwickshire children (**31.7%**) in Year 6 are classified as being either overweight or obese along with **22.3%** of Reception age children[31]. Trends in levels of overweight and obesity in both adults and children suggest that these figures could increase by 2025.

The rate of hospital admissions for alcohol specific conditions in persons under 18 in Warwickshire has been significantly higher than the rate in England in recent years[32]. If the trend continues there will be more than 50 admissions per 100,000 under 18s by 2025.

Mental Health

The awareness of mental health issues is increasing; currently one in four adults will experience a mental health problem in any given year[33]. With awareness increasing more adults and young people are likely to present to health services by 2025. Indeed, the incidence of depression recorded on practice registers has increased from 0.9% of the patients aged 18 in 2013/14 to 1.6%in 2017/18[34]. The need to promote good mental well-being both at an individual and community level will increase.

The suicide rate in Warwickshire has been significantly higher than the rate in England in recent years. Levels have been over 10 per 100,000 population since 2010-12 - given the most recent years published data levels could potentially decrease to 10 per 100,000 by 2025.

Loneliness and social isolation has been identified as an area to address in the initial place-based joint strategic needs assessments. With an ageing population and a higher ratio of dependents this issue is likely to increase in importance by 2025.

Waste Management

In 2018/19, WCC managed over **250,000 tonnes** of waste[35]. Just over **1000kg** of household waste is collected per household each year, of which **over half (51.7% in 2018/19)** is recycled. WCC has access to a wide variety of infrastructure to manage its household waste. Residual waste (collected household waste that is not sent for reuse, recycling or composting) analysis shows that approximately half of our household residual is recyclable using current services. About a third of household residual waste is food waste.

The Government's resources and waste strategy published in 2018 sets out a plan for the next 30 years which aims to implement circular economy principles to manage waste as a material and minimise waste and maximise reuse, recycling and composting[36]. Government has consulted on ideas such as clear and consistent recycling schemes nationally (including the collection of food waste), a deposit return scheme for drinks containers, and producer responsibility so producers of waste are financially responsible for its management. Government plans to implement its ideas before 2025 which could quite radically change the way waste is managed across the country.

As well as household waste there is much commercial and industrial waste in Warwickshire and as the economy grows this waste could increase too. The vast majority of this commercial is waste is managed by private companies. Waste infrastructure in and around Warwickshire will have to develop to accommodate the changing quantity and nature of the waste we have to manage.

By 2025 it is expected that the quantity of waste being managed will have increased due to housing and business growth. However, more material will be recycled or composted and less material will be disposed of. The way that people manage their waste may also change significantly with more materials being taken back to shops by consumers and less recycling being collected by local authorities. The number and types of materials collected by local authorities may also change due to new financial drivers and a greater onus on manufacturers to ensure product recyclability.

WCC provide 9 household waste recycling centres across Warwickshire. These centres are well used and valued by local people for the management of their wastes. These centres also offer a service for local businesses. This service will need to be reviewed and developed to ensure it meets the future needs of the county.

Education

An estimated increase in the school- aged population between 2018 and 2025 is likely to place increasing demand on school places, particularly in areas where large housing developments are planned.

The target for Warwickshire is for the supply of places to exceed demand by approximately 4% in any planning area. Available capacity in **primary schools** is forecast to be lower than this by 2023/24 in a number of school planning areas throughout Warwickshire[37] (Polesworth, Nuneaton North West, Nuneaton North and East, Rugby North Central, The Revel, Rugby West, South Leamington, Radford Semele, Southam, Napton, Alcester, Bidford, Kineton, Ettington, Ilmington, Shipston, Stratford Rural, Compton & Brailes and Quinton). Available capacity in **secondary schools** by 2025/2026 is forecast to be lower than 4% in **15 out of 17** planning areas with some areas forecast to have pupils numbers over 10% greater than capacity (Atherstone -61%, Nuneaton -12%, Rugby South -14%, Rugby North -38%, Warwick & Leamington -17%, Alcester & Studley -11%, Shipston -54% and Stratford -15%).

Due to population growth and a growing demand for specialist provision a 20% (n=259) increase in young people requiring special school places is forecast by 2022/23[37]. The priority areas for development have been identified as Nuneaton and Bedworth, East, Central and South Warwickshire.

One of the challenges outlined in the Warwickshire Education Strategy 2018-2023 is to champion employability by promoting the best opportunities for all learners. This will become increasingly important as the local economy continues to grow; the requirements of local industry and employees should be considered when considering the skills to be developed in higher education and through apprenticeships.

The Department for Education's 2019 strategy "Realising the potential of technology in education" sets out plans for the future to improve internet connectivity in schools and encourage and support schools, colleges and other providers to consider moving to a cloud-based approach for their IT systems and storage[38]. Technology has the potential to impact on how education is delivered in 2025. Technologies such as virtual reality, gamification (learning via video games) and Artificial Intelligence (developing customised student learning solutions based on test results) will continue to be developed with learners in mind creating a more personalised approach. The growing trend towards online access to educational content and learning resources will continue and will be particularly important in increasing access to higher and further education opportunities. Innovation in assistive technology also promises to help educators improve learning outcomes for students with special educational needs and disabilities.

Environment

In July 2019 WCC declared a climate emergency. Targets and actions are being developed and will be agreed in 2020.

Action to reduce the carbon emissions from Warwickshire will require change from everyone in the county including local residents, businesses and local councils. By 2025 it is expected that action on climate change will be advancing and include measures such as better insulation of new and existing homes and buildings, less use of fossil fuels, more use of green electricity, local schemes to generate electricity and offsetting of carbon through initiatives like tree planting. New and existing homes and buildings will be improving their energy efficiency by installing better insulation. This action will be supported by guidance and drivers from central government, including financial drivers, which will incentivise better environmental performance. Electric cars will become more common and affordable. Wind, solar and hydro electricity generation will be more popular. Technology will be developed to help us to lessen our impact on the environment and to make any behavioural changes needed as acceptable as possible.

The current focus on air quality is expected to continue and the use of better technology to measure pollutants e.g. particulate matter will inform this focus. The use of electric vehicles will mean less pollution generated on our streets and more sustainable transport such as walking, cycling and public transport will help too. Burning less fossil fuels at home and at work will also have a positive impact when we consider the total emissions from the whole of Warwickshire. Clean air and low emission zones can be used to protect and improve air quality and it could be that these are used in Warwickshire.

Even with actions to reduce our carbon emissions to mitigate climate change it is still expected that effects will be seen. Our climate is expected to get warmer with more extremes such as droughts and floods. Work on climate change adaptation to cope with these will be developing and being actioned.

It is expected that not only will local government be working to reduce its impact on the environment but that it will be encouraging members of the public and businesses to become more green too. For businesses not only will this help protect the environment but it will also ensure their continued prosperity.

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