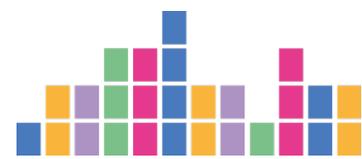




# Warwickshire in 2030 and beyond

*September 2023*

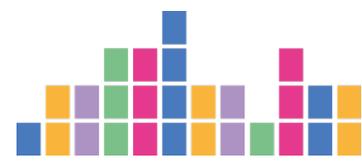
Projections are based on an interpretation of information available at the time of writing. The report is not intended to be a definitive statement of what Warwickshire will look like in 2030 and beyond and should not be used for commissioning purposes without additional information.



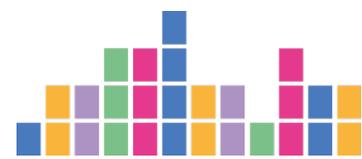
## Warwickshire in 2030 and beyond

### Key Messages

- Population projections indicate that the number of residents living in Warwickshire will continue to increase. This increase is mainly due to the increasing number of residential properties and internal migration.
- It is projected that there will be increases in the number of school-aged children which will increase the demand for nursery, primary and secondary school places and services that support the needs of young people. Warwickshire's growth is scattered across the county and growth is often not in locations where surplus capacity exists, as a result WCC expect to plan for / build at least another seven new schools in the next 15 years.
- The number of people in the population who are aged over 70 years old is projected to increase. Of these there is a growing proportion who are aged 85 years or older. An ageing population will have an impact on demand for health and social care services, particularly in areas where the population is less wealthy. Estimates suggest that in Warwickshire in 2030 there will be a substantial increase in people aged 65 and over living in a care home (both LA and non-LA).
- Warwickshire has an increasingly diverse population with this trend likely to increase into the future. In 2021, more than 85 different languages were used as a first language by Warwickshire residents. Services should be aware of this and plan to meet the needs of all residents.
- Thousands of people employed in Warwickshire commute into the county. Future commuting trends will depend on Warwickshire's levels of economic growth and patterns of location-based working. Substantial in-commuting impacts on the day-time population of Warwickshire and needs to be factored into infrastructure and service planning.
- Home ownership has decreased since 2011 whilst private rented has increased. With less disposable income and increases in mortgage interest rates this trend is likely to increase, particularly in younger households. An increase in requirement for private rented properties could lead to issues with rent levels, security of tenure and quality, particularly for vulnerable groups.
- Rises in the cost of living, welfare reforms and social housing supply issues are likely to mean that a national trend in increases in people living in unaffordable homes and increases in homelessness will be mirrored in Warwickshire.
- Potential employment growth in Warwickshire is expected to increase by around 6.0% between 2023 and 2030. Based on population estimates, this would result in a mismatch between job growth and the resident workforce. In recent years the average age of exit from the labour market has decreased. If this trend continues it will also impact on the available workforce.
- It is anticipated that Warwickshire will see its largest employment growth by 2030 in its food & beverage services; IT services; business support services; and warehousing & postal. The largest employment reductions are predicted to be in motor vehicles and the related supply chain.
- By 2030 there is a risk that the motor vehicle industry will no longer be Warwickshire's most competitive and concentrated industry, with significant impact on the occupations linked to the manufacture of motor vehicles, including assemblers and routine operatives, vehicle trades and metal machining.



- Higher level skills will be important in the future economy. A lack of workers and skills shortages may well accelerate uptake of automated processes in local industrial sectors. A future challenge for Warwickshire is to champion employability by promoting the best opportunities for all learners. The requirements of local industry and employees should be considered when considering the skills to be developed in higher education and through apprenticeships.
- Reforms to children’s social care will mean changes in the system in the near future with the goal of reducing the need for crisis response and providing more early support to families. The number of children in care has reduced in Warwickshire but Warwickshire are accommodating a large number of unaccompanied asylum-seeking children as part of the national transfer scheme.
- Unpaid carers will continue to play a significant role in delivering aspects of social and personal care. For those without support networks there is a risk of loneliness and social isolation. Declining participation in volunteering apparent nationally may impact on provision of informal support to vulnerable groups in the future if mirrored in Warwickshire.
- 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.
- There are two key areas that will impact on community safety over the next decade: societal issues and the changing policy and legislative landscape. Societal issues include rising costs of living; migration; and online crime and fraud. The changing policy and legislative landscape will include the Serious Violence Duty; Violence against Women and Girls and Domestic Homicide Reviews; drug and alcohol strategy; Anti-Social behaviour tools and powers; the role of Community Safety Partnerships, and refocussing of the national Prevent programme.
- Climate change will result in operational challenges to Warwickshire Fire & Rescue, including the increased frequency and prevalence of flooding incidents, and the increased intensity of outdoor fires and wildfires.
- It is likely that the level of road traffic collisions will increase in the future for several 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.
- Although the proportion of households owning a car has increased, it is uncertain if this increase will continue. The COVID-19 pandemic impacted on travel to work, and many households reduced car ownership as working from home became more common. In addition, concerns for the environment are encouraging people to rethink how they travel particularly those living in towns and cities.
- By 2030 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.
- There is likely to be an increasing demand for digital self-help technology across all services that WCC provides. Artificial intelligence and robotics will increasingly be adopted including virtual customer service assistants (chatbots) to handle basic queries.



## Population

*The latest population projections for local authorities are based on 2018 population estimates and should therefore be treated with caution – projections based on the 2021 Census population data are expected in 2024.*

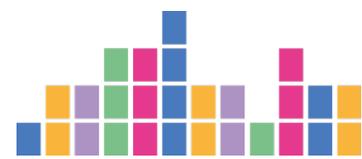
Using the mid-2018 based data, by 2030 it is estimated that there will be **630,394** residents in Warwickshire, a 5.2% increase in the population compared to the mid-2021 population estimate of 599,153 residents<sup>1,2</sup>. The main reason for this increase is internal migration (moves within England). 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 this may be an underestimate.

Based on the ONS projections by 2030:

- there will be an estimated **99,446** school-age children, this is a **4.8% (4,508) increase** on the mid-2021 estimate for the 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, mental health services). There is also estimated to be a **7.0% increase** in 0–3-year-olds in this time period (from 24,683 in 2023 to 26,404 in 2030).
- the number of 16–64-year-olds (i.e the working age population) in Warwickshire will **increase** by an estimated **4,900** people between 2023 and 2030, just a **1.3% increase** in the potential workforce.
- it is estimated that **16.9%** of the population in Warwickshire (106,595 people) will be **70 years or older** and **3.7%** will be **85 years or older** (23,374 people). This is **an increase of 14,114 (15.3%) 70+ year olds and 6,926 (42.1%) 85+ year olds** in the county compared to the estimated numbers in 2021. This ageing population will have an impact on demand for health and social care services.

In 2030, there will be an estimated **68 dependents** (those aged 0-15 and 65 or older) **to every 100 adults of working age**. In 2021, there were an estimated 62 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 2030 could be marginal. Nationally, the average age of exit from the labour market has decreased recently for both males and females. In 2022, the average age of exit for men was aged 65.4 years, decreasing by 0.1 years to 65.3 years in 2023, this is the same as the male average age of exit in 2019 and 2020. The 2022 average age of exit for women was 64.3 years and has decreased by 0.3 years to 64.0 years in 2023, this is equal to the female average age of exit in 2021<sup>3</sup>. In Warwickshire in 2021<sup>4</sup> census, just over 11% of people aged 65+ were in employment.

An increase in the population is seen across all districts and boroughs. Looking at population data at a district/borough level between 2021 and 2030<sup>1,2</sup>:



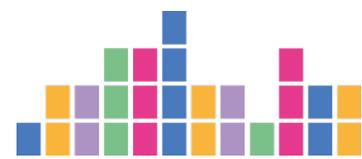
- The most growth is projected to take place in North Warwickshire, followed by Stratford-on-Avon. The lowest level of growth is projected for Rugby.
- Only two categories below are predicted to see a decline in population – those aged 16-64 in Rugby and those aged 4-17 in Warwick.
- All other areas and ages are predicted to see a population increase. These increases are higher in the 70+ and 85+ age categories.

District/ Borough	Age groups (change in number projected for 2030 & percentage change from 2021 estimates)					
	All	0-3	4-17	16-64	70+	85+
North Warwickshire	7,448 11.4% ↑	290 11.2% ↑	1,177 11.7% ↑	2,770 7.0% ↑	2,369 22.3% ↑	906 51.7% ↑
Nuneaton & Bedworth	3,614 2.7% ↑	58 0.9% ↑	582 2.6% ↑	267 0.3% ↑	1,811 9.6% ↑	921 30.3% ↑
Rugby	2,461 2.1% ↑	70 1.4% ↑	868 4.3% ↑	-1446 -2% ↓	2,003 12.7% ↑	1333 47.5% ↑
Stratford-on-Avon	12,478 9.2% ↑	722 14.7% ↑	1,970 9.8% ↑	2,899 3.6% ↑	4,864 18.7% ↑	2,084 43.6% ↑
Warwick	5,241 3.5% ↑	580 9.8% ↑	-88 -0.4% ↓	410 0.4% ↑	3066 14.5% ↑	1683 41.4% ↑

Experimental data, estimates that between 82,500 and 99,650 people commuted into Warwickshire for work in 2021, which accounted for **44-46%** of the total number of people employed in the county<sup>5</sup>. This is modelled data based on mid-pandemic and pre-pandemic commuting travel behaviours but nevertheless, commuting into Warwickshire has increased since 2011 data. Future trends will depend on Warwickshire's levels of economic growth and patterns of location-based working. 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 2021, **12.5%** of the population were born outside of the United Kingdom<sup>6</sup>. Of these, **52%** were born in Europe, **29%** in Middle East and Asia, **11%** in Africa, **6%** in The Americas and Caribbean, and **2%** in Antarctica and Oceania. The percentage of the population in all high-level ethnic groups except 'White' increased between 2011 and 2021, with the largest proportional increase seen in people identifying as 'Asian', with the Indian ethnic group having the highest increase in the Asian ethnic group. This trend in increasing diversity is likely to continue in the future.

The number of people moving into Warwickshire from outside the UK is estimated to be between 2,886 – 3,078 each year between now and 2030<sup>7</sup>. Taking into account international emigration, it is estimated that net International Migration will account for between **an average of 790 extra residents** in Warwickshire each year to 2030.



In 2021, 6.9% of Warwickshire residents did not have English or Welsh as a main language; additionally, more than **85** different languages were used as a first language<sup>8</sup>. The percentage of residents not speaking English as their main language has increased since 2011 and may continue to do so if international migration increases. In 2022/23, 13% of pupils in Warwickshire’s state schools spoke a language other than English as their first language. This has risen from 10.3% in 2018/19<sup>9</sup>.

## Households and housing

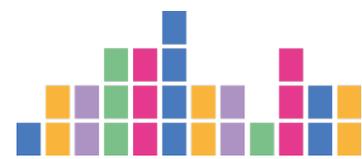
### Households

A household is defined as “one person living alone, or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area”. Household projections show the potential number of households there would be in the future if a set of assumptions about the size and structure of the population, and that population’s patterns of household formation, were realised in practice. ONS 2018-based projections suggested that by 2030 there will be **271,250** households in Warwickshire<sup>10</sup>. This would represent a rise of nearly **18,000** households, or **7.1%**, from 2021 when there were an estimated 253,262 households<sup>4</sup>. Based on the ONS projections at a district and borough level the largest increase in households between 2021 and 2030 were projected to be in North Warwickshire.

Change in households	North Warwickshire	Nuneaton & Bedworth	Rugby	Stratford on Avon	Warwick
Number in 2021 (Census)	27,580	56,586	47,013	59,464	62,619
Projected number in 2030	31,043	59,434	49,555	64,912	66,306
Change	3,463	2,848	2,542	5,448	3,687
% change	12.6%	5.0%	5.4%	9.2%	5.9%

*There are a number of caveats to interpreting this data that need to be considered:*

- 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). Any further housebuilding in Warwickshire could mean the projection are low.*
- 2. The latest available household projections are based on 2018 population-estimates which are outdated. The calculations above use these 2018-based household projections combined with data on households from the 2021 Census – this may impact on accuracy of the magnitude of the change.*



In 2021, **31%** of Warwickshire households were headed by someone aged 65 or over<sup>11</sup> This is estimated to increase by 2030 (by 2043 estimates suggest **37%** of households will be headed by someone aged 65 or over)<sup>10</sup>. The composition of households is also likely to change by 2030 with fewer persons per household. The average household size in 2023 was projected to be 2.31 persons, estimated to reduce to 2.28 persons by 2033<sup>10</sup>.

### Housing

Local Plan targets for the number of new dwellings in each borough and district for 2011-2031, and the net completions to the last reporting period (2021/22) are shown in the table below<sup>12</sup>.

This means there is expected to be a further 35,180 dwellings completed by 2031.

	North Warwickshire	Nuneaton & Bedworth	Rugby	Stratford on Avon	Warwick
Target in Local Plan	Min 9,598	14,060	12,400	14,600	Min 16,776
Net completions Apr 2011-Mar 2022	2,413	5,052	6,742	10,023	8,346
Remaining dwellings	7,435	9,080	5,658	4,577	8,430

As the population of Warwickshire increases, demand for housing will increase. This demand will be mostly met by new housing, but the tenure of the housing will need to reflect market needs.

In 2021, in Warwickshire, 68.2% of households owned their property, 16.7% private rented and 13.7% social rented<sup>4</sup>. This compares to 70.0%, 14.1% and 13.8% respectively in 2011. In line with national data, home ownership has decreased whilst private rented has increased. With less disposable income and increases in mortgage interest rates this trend is likely to increase, particularly in younger households.

An increase in requirement for private rented properties could lead to issues with rent levels, security of tenure and quality, particularly for vulnerable groups. However, new legislation such as the Renters' (Reform) Bill 2023<sup>13</sup> aims to improve conditions for tenants including:

- Applying the Decent Homes Standard to the private rented sector, giving renters safer, higher quality homes and remove the poor-quality homes in local communities. This will help deliver the government's Levelling Up mission to halve the number of non-decent rented homes by 2030.
- Making it illegal for landlords and agents to have blanket bans on renting to tenants in receipt of benefits or with children – ensuring no family is unjustly discriminated against when looking for a place to live.



- Strengthening councils' enforcement powers and introduce a new requirement for councils to report on enforcement activity – to help target criminal landlords.

### Homelessness

In Warwickshire, in 2021/22, homelessness (households owed a duty under the Homeless Reduction Act) was lower than the rate in England; 7.6 per 1,000 households, whilst the rate in England was 11.7 per 1,000 households<sup>14</sup>. The rate in Warwickshire had decreased over the proceeding two years from 2019/20, when the rate was 10.9 per 1,000 households. However, nationally, the rate has increased, and English Councils have received more calls for help with homelessness in 2023 than since record began in 2018<sup>15</sup>. Rises in the cost of living, welfare reforms and social housing supply issues are likely to mean this national trend will be mirrored in Warwickshire. Recent research suggests that one in five households in England will be forced to spend more than a third of their income on housing and live in unaffordable homes by 2030<sup>16</sup>. This may lead to an increase in homelessness in Warwickshire by 2030.

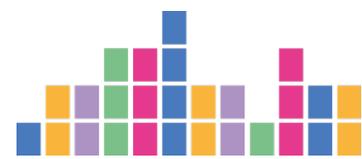
### **Economy**

Overall, potential employment growth in Warwickshire is expected to increase by 6.1% (21,500 + jobs) between 2023 and 2030<sup>17</sup>. 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). However, this potential employment growth is unlikely to be fully realised due to a widespread skills and labour shortage.

The industries employing the most people in Warwickshire in 2021 were: Wholesale, Retail & Repair of Motor Vehicles (48,000); Manufacturing (36,000); Health (32,000); Professional, Scientific & Technical (26,000); Transportation & Storage (25,000); Administrative & Support Services (23,000); Accommodation & Food Services (23,000); and Education (21,000)<sup>18</sup>. It is anticipated that Warwickshire will see its largest employment growth by 2030 in its: Food & Beverage Services (4,500 jobs or 22%); IT Services (3,000 jobs or 25%); Business Support Services (2,300 jobs or 7%); and Warehousing & Postal (1,300 jobs or 8%). The largest employment reductions are predicted to be in Motor Vehicles and the related supply chain (circa 1,500 jobs or 8%)<sup>17</sup>.

In terms of employment numbers, in 2030, it is expected that the Retail Trade, Food & Beverage Services, Education, Construction, and Health - will employ the most people. The growth in the number of Other Skilled Trades is expected to be the largest amongst all the occupations in Warwickshire between 2023-2030, followed by Science/Tech Professionals, Teaching/Research Professionals, and Sales Occupations.<sup>10</sup>

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



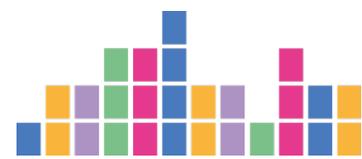
manufacturing industry. By 2030 there is a risk that this will no longer be Warwickshire's most competitive and concentrated industry, with significant impact on the occupations linked to the manufacture of motor vehicles, including assemblers and routine operatives, vehicle trades and metal machining. The transition to electric vehicles will be moving at pace in 2030 in key export markets (80% of vehicles manufactured in the UK are exported, 60% to the EU). For every vehicle assembled in the UK, two internal combustion engines are manufactured. The rapid reduction in the manufacture of internal combustion engines and related systems is expected to severely affect the UK automotive supply chain, which is concentrated in Warwickshire and the surrounding area.

Across districts and boroughs, in 2025, Warwick District is expected to have a particularly strong presence in the R&D, design and product development and software and digital creative industries; Stratford-on-Avon District, has strength in automotive, particularly around Gaydon for vehicle design and development, and manufacturing of luxury vehicles, and hospitality and tourism; Rugby Borough is likely to have an above national focus on its manufacturing, e-commerce and logistics industries; Nuneaton & Bedworth Borough are forecast to be prominent in engineering, manufacturing and e-commerce and logistics; and North Warwickshire Borough is expected to have a high concentration of workers throughout their manufacturing activities, warehousing, and e-commerce.

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<sup>19</sup>. 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. Recent research has also shown that the value of qualifications at a Higher National Certificate or Higher National Degree level in Warwickshire is worth £500,000 in 2022 prices over a whole career – as compared to GCSEs<sup>20</sup>. This highlights the importance of 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, which are 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 support; however, this economic impact could be affected by people working until later in life and therefore continuing to contribute economically – if there is significant ability for over 50s to change career, retrain if necessary, and find new employment as the job market transitions.



## Social Care, Carers and Volunteering

### Children and Families

In February 2023, the Department for Education consulted on proposals to reform children's social care in its strategy 'Stable Homes, Built on Love'<sup>21</sup>. The strategy prioritizes relationships at the heart of the care system, with the goal of reducing the need for crisis response and providing more early support to families. This will include local early help and intervention with issues such as addiction, domestic abuse, and mental health to keep families together.

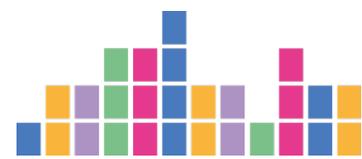
Key measures include:

- A new Child Protection Lead Practitioner role with advanced, specialist training, will work in a fully joined up way with other services such as the police, to better identify and respond to significant harm. The change will mean services work more effectively to protect children from harms that happen outside of the home, such as criminal exploitation and serious violence.
- A focus on improved support and reducing barriers to kinship care.
- Local authorities will be supported to recruit new child and family social worker apprentices and there will be consultation on proposals to reduce over-reliance on agency social workers.
- A new children's social care national framework will be implemented which sets out clear outcomes that should be achieved across all local authorities to improve the lives of children and families.

Warwickshire's Children & Families Service have worked hard to safely reduce the numbers of children in care. This is reflected in a 4.4% reduction in children in care between the 2022 and 2023 financial year end (822 at 31 March 2022 compared to 778 at 31 March 2023). Numbers of children in care can fluctuate although Warwickshire are successfully seeing reductions compared to the national trend where increases have continued. It is worth noting that Warwickshire are accommodating a large number of unaccompanied asylum-seeking children as part of the national transfer scheme which supports entry to local authorities such as Kent County Council<sup>22</sup>.

### Adult Social Care

In 2022/23, 10,989 adults (2.3% of the population aged 18 and over) received a WCC-commissioned social care service<sup>23</sup>. Due to an increasing ageing population the demands on adult social care is likely to increase by 2030, particularly in areas where the population is less wealthy. Estimates suggest that in Warwickshire in 2030 approximately 4,935 people aged 65 and over will be living in a care home (both LA and non-LA) with or without nursing, an increase of 35.7% from 2025 estimates<sup>24</sup>.



## Carers

Carers will continue to play a significant role in delivering aspects of social and personal care. In 2022/23, there were **4,315 carers** (aged 18 and over) in Warwickshire who were assessed and/or received some level of support from WCC<sup>25</sup>. However there are many more carers providing varying amounts of care - the 2021 Census suggested **14,124** residents aged 16 and over provided substantial unpaid care in a week (50+ hours) whilst a further **34,678** provided some unpaid care (1-49 hours)<sup>26</sup>. This number reduced from the 2011 Census which may indicate a greater number of residents working and unable to provide informal care which could impact on services. There is an increasing prevalence of 'sandwich carers' – those looking after young children at the same time as caring for older parents.

## Volunteering

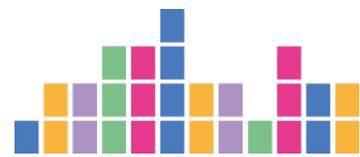
There has been an increased focus on working in partnership with the voluntary and community sector to support and empower communities to be strong, resilient, self-supporting and connected. The COVID-19 pandemic saw a resurgence in both formal and informal volunteering but this has reduced as people have returned to work. In 2021/22, 27% of respondents reported taking part in formal volunteering at least once in the last year (approximately 12 million people in England). This is lower than 2020/21 (30%, approximately 14 million people) and lower than rates between 2013/14 and 2019/20 (between 36% to 45%). This participation rate is the lowest recorded by the Community Life Survey and is likely to be reflected in Warwickshire.

The National Council for Voluntary Organisations' (NCVO) 'Time Well Spent report in 2023', also highlighted signs of declining participation, satisfaction and likelihood to continue volunteering particularly in young people. The report also found that there was an increasing concern among volunteers about being out of pocket and that there has been a noticeable shift since 2019 towards remote volunteering. The report concluded that volunteer-involving organisations must remain versatile in their approach to volunteering, including ensuring volunteering environments are actively welcoming those from all backgrounds, showcasing the many positive flexible and remote volunteering opportunities on offer and clearly communicating expenses policies, to address some of the practical barriers to volunteering<sup>27</sup>.

## **Education**

### Population increases and school capacity in Warwickshire

Warwickshire is undergoing a period of significant growth, with large scale housing development across the county. Local Plans across the five district/borough areas of the county highlight 63,000 additional new homes across the county resulting in the need for approximately 30,000 additional primary and secondary school places, 4,000 of which will need providing between now and 2027. Like other 'shire' areas, Warwickshire's growth is scattered across the county and growth is often not in locations where surplus capacity exists.



To accommodate this growth, as well as numerous school expansions, 12 new schools have opened in Warwickshire since 2010, comprising six primary, two secondary, one all-through and three special schools. During the next fifteen year period WCC expect to plan for / build at least another seven new schools.

Warwickshire as a whole is forecast to have a 2% increase in total primary pupils between 2023 and 2027. This slight growth is not universal across the county; North Warwickshire does not have the same levels of new or approved housing development as other areas and is forecast to have a reduction in primary cohorts across the forecast period. Warwickshire as a whole is forecast to have a 10% increase in total secondary pupils between 2023 and 2029. All areas across the county will experience some pressure on secondary school places.

### Skills and learning

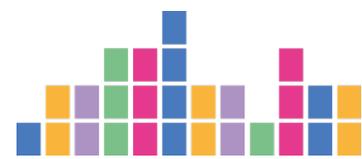
In its Schools of the Future<sup>28</sup> paper, the World Economic Forum outlined essential characteristics that will define high-quality learning in the future.

- Global citizenship skills (including awareness of the wider world, and sustainability).
- Innovation and creativity skills (including problem-solving and analytical thinking).
- Technology skills (including data science and programming)
- Interpersonal skills (including emotional intelligence, empathy, cooperation and social awareness).
- Personalised and self-paced learning (learning based on the diverse individual needs of each learner, and flexible enough to enable each learner to progress at their own pace)
- Accessible and inclusive learning (learning not just confined to those with access to school buildings everyone has access to learning)
- Problem-based and collaborative learning (move from process-based to project- and problem-based content delivery, requiring peer collaboration)
- Lifelong and student-driven learning (continuous improvement on existing skills and acquisition of new skills based on need)

In line with this, a future challenge for Warwickshire 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.

### Delivery of education

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 accelerated by the COVID-19 pandemic 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.

A report in July 2022 from an international IT company<sup>29</sup> surmised the following with regards to how innovation in education will play out:

*In 2025:*

- many EdTechs will be further developed (i.e. e-learning platforms)
- new techs in education will gain more and more users
- university online degree programs will expand
- 5G Internet's speed will allow VR and AR classes to be held online

*In 2030:*

- VR and AR will be used extensively in natural sciences
- metaverse will become a common teaching tool
- students' grades and accomplishments will be in blockchain, eliminating the possibility of malversation
- nearly half of school children will work in jobs that won't exist at the time

*In 2050:*

- the job market will require skills that weren't taught in 2022
- VR and AR will be used for taking exams
- teachers will have become consultants, as frontal instruction is all but abolished
- No more paper or e-textbooks, as all learning is visual

## Health and Wellbeing

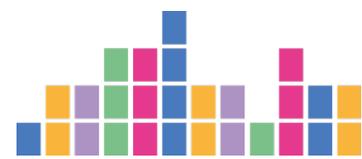
There are variations in health outcomes within the county, and within districts and boroughs. These variations are likely to continue in 2030. The Joint Strategic Needs Assessments identify variation and enable services to be targeted at those with greatest need<sup>30</sup>.

### Life Expectancy

In Warwickshire, life expectancy at birth in 2018-2020 was 79.7 years for men<sup>31</sup> and 83.4 years for women<sup>32</sup>. This is a slight reduction from previous years for both men and women, however remains significantly better than England average. Improvements in mortality have slowed since 2011 and this is reflected in slower improvements in projected period life expectancies; it is too early to say with any certainty what impact coronavirus may have on long-term mortality trends<sup>33</sup>. Given the trend in Warwickshire it is likely that by 2030 life expectancy will be around 80 years for males and 84 years for females.

### Healthy Life Expectancy

Healthy life expectancy shows the years a person can expect to live in good health (rather than with a disability or in poor health)<sup>34</sup>. Healthy life expectancy for men in Warwickshire in 2018-



2020 was 62.1 years, a reduction of 2.5 years from the previous period (2017-2019)<sup>35</sup>. This significant decrease was not reflected nationally. If this is an outlying period, healthy life expectancy in Warwickshire could return to national levels around 63 years by 2030. For women healthy life expectancy was 64.1 years in 2018-20 and has been at similar levels for previous periods<sup>36</sup>. If current trends continue by 2030 healthy life expectancy is likely to remain around 64 years.

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 leads to demand on health and social care services, as well as having an impact on individuals, families, and workplaces. In Warwickshire for 2018-20, the “window of need” was 17.6 years for males and 19.3 years for females. By 2030, the window of need could remain at similar level for males and for females.

### **Chronic diseases**

By 2030, 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. Overall, dementia represents the biggest growing cause of disability and rates are predicted to increase by 28% in people aged 65 or over in Warwickshire between 2020-2030 (from 8,760 in 2020 to 11,227 in 2030)<sup>37</sup>. 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<sup>38</sup>.

### **Lifestyle-related diseases**

In 2021/22, two thirds (**66.2%**) of Warwickshire adults were classified as overweight or obese<sup>39</sup>, this is significantly worse than the England average and **22.4%** were physically inactive<sup>40</sup>. In addition, more young people are being classified as either overweight or obese. In 2021-2022 one in three Warwickshire children (**35.9%**) in Year 6 are classified as being either overweight or obese<sup>41</sup> along with **21.3%** of Reception age children<sup>42</sup>. Trends in levels of overweight and obesity in both adults and children suggest that these figures could increase further by 2030.

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<sup>43</sup>. However over recent years the rate has fallen and could maintain around 44 admissions per 100,000 under 18s by 2030.

### **Mental Health**

One in four adults will experience a mental health problem in any given year<sup>44</sup>. With awareness increasing more adults and young people are likely to present to health services by 2030. Indeed, the incidence of depression recorded on practice registers has increased year on year from 5.7% 2013/14 to 14.4% in 2021/22<sup>45</sup>. The need to promote good mental well-being both at an individual and community level will increase.



The suicide rate in Warwickshire has not been significantly different than the rate in England in the most recent years. Levels were over 10 per 100,000 population in 2019-20 - given the most recent years published saw varying data levels it could remain around 10 per 100,000 by 2030<sup>46</sup>.

High levels of poor wellbeing and mental ill health were addressed in both the 2021 Adult Mental Health and Wellbeing Coventry and Warwickshire Joint Strategic Needs Assessment (JSNA)<sup>47</sup> and the recent 2023 Mental Health and Wellbeing of Infants, Children, and Young People JSNA<sup>48</sup>.

## Crime & Community Safety

There are two key areas that will impact on community safety over the next decade; **societal issues** and the **changing policy and legislative landscape**.

### **Emerging societal issues affecting crime and community safety**

The impact of global, international and national societal factors will have a long term affect on community safety and crime rates. These factors will require a broader partnership involvement, including a wider range of public sector and voluntary organisations, businesses, education providers and local communities, to plan and respond to the long-term impacts.

The key societal issues include:-

- **COVID Pandemic**– Whilst the global response to covid has significantly reduced the population health risk, the impact of covid lockdown, particularly amongst young people is still being felt. School leads, from early years into secondary educations continue to see these impacts, particularly in terms of socialisation, behavioural challenges and increases in risk taking behaviour leaving to serious confrontation and in some cases violence. School exclusion rates have significantly increased at primary and secondary level. These behavioural challenges are echoed within local communities and it is highly likely that this will continue to be a key challenge for a generation of young people into the late 2020's and early 2030's
- **Cost of living crisis** – There is strong historical evidence that in times of severe cost of living pressures, there is a direct correlation to increases in certain crime rates. Whilst the immediate affect can be seen in increases in acquisitive crime such as shop lifting, theft from and of vehicles, rural crime offences and cycle theft (an average of 77,313 bicycles are reported stolen in the UK every year, according to data from the Office for National Statistics), there are more long-term impacts. It is highly likely that there will be an increase in domestic violence offences, leading to significant pressures on housing, refuse provision and children and families services. Domestic violence currently account for approximately one third of all recorded violence with injury offences at just over 1,600 incidents. There is likely to be a direct correlation to increases in alcohol and substance misuse which will impact on local provision. There is evidence from the early to mid-2010's that the illegal economy may be viewed by some individuals and families as the most economically viable



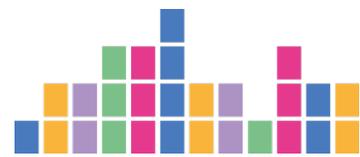
option, particularly is what is perceived a low-risk activity such as drug supply. Changing this narrative, once the illegal economy is established is extremely challenging for community safety partnerships. There is also strong evidence that the cost-of-living crisis can increase the risk of community tensions, where a single high-profile incident can lead in significant unrest. Creating strong community networks that can assess and respond to those tensions will be a key part of the community safety agenda over the next decade.

- **Migration** – Migration brings enormous benefits to local areas, whether it be through internal migration connected to new developments and employment opportunities or international migration. However, there are organised criminal networks who exploit migration to establish or take over criminal markets, from counterfeit or illegal goods, modern day slavery and trafficking to controlling drug supply markets. The methods used include serious violence offences and there is a risk of a significant increase in serious violence connected to this activity. Warwickshire is already beginning to feel the effects of this activity and the current profile indicates that this will increase over the coming decade.
- **Online crime and fraud** – On-line crime has continued to grow over the early part of 2020's. A recently published report by Of-com on on-line fraud has estimated that nearly nine in ten adult internet users (87%) have encountered content online which they believed to be a scam or fraud and 46% of adult internet users reported having personally been drawn into engaging in an online scam or fraud, while four in ten (39%) reported knowing someone who has fallen victim to an online scam or fraud. The increasing dependency on technology in our daily lives will increase the risk of fraud and scams, from accessing personal and financial data to 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.

### **Changing policy and legislative landscape**

There is number of key national legislative changes that will have a long-term impact in the next decade:

- **Serious Violence Duty** – The Police Crime Sentencing and Courts Act 2023, introduced the Serious Violence Duty to named partner agencies and education providers to work together to develop action plans to reduced and prevent serious violence. It also introduces Offensive Weapon Homicide Reviews which will come into force national from 2025. In addition, there is a renewed focus on addressing serious organised crime with an imminent refresh of the Governments Serious Organised Crime Strategy. Serious Violence is likely to remain a top priority for Warwickshire over the next decade and this will be reflected in the 10-year Warwickshire Serious Violence Prevention Strategy. Currently violence against the person accounts for 37% of all recorded Total Notifiable Offences. A recent Strategic Needs Assessment on the serious violence profile for Warwickshire has highlighted a number of common causal factors which increase the risk of a person



becoming involved in serious violence. Addressing these factors will be at the heart of our long-term partnership response.

- **Violence against Women and Girls and Domestic Homicide Reviews** – The government has recently introduced a new framework for local partnership agencies to respond to Violence Against Women and Girls. This includes work around safe accommodation and increased focus on perpetrators. The government has also completed a review of the guidance on Domestic Homicide Reviews. Warwickshire, along with many other Local Authority areas has seen a significant increase in DHR's with 10 on going cases. Domestic Violence will continue to be a priority area both in terms of offences and as a key causal factor in other offending history. It is highly likely that DHR cases will continue to increase due to the societal pressures highlighted above.
- **Drug and Alcohol Strategy** – In December 2021 the government published “From Harm to Hope: A 10-year drug plan to cut crime and save lives,” a strategy to combat the supply of illegal drugs, increase the current treatment provision for those affected by drug dependency and reduce drug related deaths. Accompanying guidance for delivery partners, including local authorities, was also published. The government ambition is to achieve a generational shift in the country's relationship with drugs and to reduce overall drug use towards a historic 30-year low, whilst reducing the harms that drug addiction and supply cause to individuals and neighbourhoods. Warwickshire has already re-invigorated its approach by reintroducing a Drug and Alcohol Strategic Partnership, running since May 2022. The recent increase in drug related deaths in the county and West Midlands has brought into sharp focus the long-term commitment needed by partner agencies on this agenda.
- **Anti-Social behaviour Tools and Powers** – The Home Office has recently completed a consultation on Anti-Social Behaviour Tools and Powers with a view to increase the powers available to partner agencies to address local issues. The renewed focus on addressing ASB will increase community expectations and the pressure on other front-line services.
- **Role of Community Safety Partnerships** - Successive Governments continue to place the concept of ‘Community Safety Partnerships’ and ‘County Strategic Groups’ front and centre in the fight to prevent and reduce crime and disorder. This is likely to be further embedded as the results of the Home Office current review of CSP's becomes known.
- **Prevent** – The recently published Shawcross report on the national prevent programme has made a number of recommendations in term of the refocusing on violent extremism and the assessment of those vulnerable to radicalisation. It is likely that Prevent will remain a key area over the next decade with an increasing scrutiny of central government on how Prevent and Channel is delivered locally. This will require the engagement with a wider variety of partner agencies, both from the faith and voluntary community, as well as housing providers, to ensure that we have considered all of the determining factors and particularly wider vulnerabilities and intersectionality.



### Warwickshire Fire and Rescue

Road traffic collisions remain the most frequently attended non-fire incident for Warwickshire Fire & Rescue and there is a recognised high risk to life. 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.

Climate change will result in operational challenges to Warwickshire Fire & Rescue, including the increased frequency and prevalence of flooding incidents, and the increased intensity of outdoor fires and wildfires. Aligned to this, it is likely that there will be longer fire seasons, more extensive fire-affected areas, and increased urban-wildland interface fires. These seasonal events will put additional strain on Fire Service resources, including the need to plan for these surge events.

A focus for Warwickshire Fire and Rescue will be to identify those at the highest risk and who are most vulnerable in the community. With an increasing ageing population, as well as continued domestic and commercial development across the county, demands for a Specialist, Targeted and Universal approach are likely to increase. WFRS will continue to take an integrated collaborative approach to address these risks.

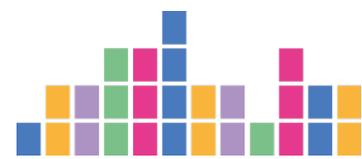
## Transport

### Car ownership

Between 2011 and 2021, there was an increase in the number and proportion of households in Warwickshire owning or having a car available to use (84.7%, n=214,712 in 2021 compared to 82.4%, n=190,386)<sup>4</sup>. The proportion owning more than one car has also increased (45.0% compared to 41.5%). 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.

Although the proportion of households owning a car has increased, it is uncertain if this increase will continue. The COVID-19 pandemic impacted on travel to work, and many households reduced car ownership as working from home became more common. In addition, concerns for the environment are encouraging people to rethink how they travel particularly those living in towns and cities.

The type of cars owned is also changing. There has been a decrease in the number of registered diesel cars and an increase in the number of electric and hybrid cars registered. This will impact on the need for local authorities to improve the infrastructure to support electric vehicles.



### Parking

New technology developments, such as the DfT-funded National Parking Platform, are likely to impact the way that local authorities procure and deliver parking services in the future<sup>49</sup>. Looking into the future, the DfT's vision for parking management is much broader. Further developments could include the service providing a more comprehensive information source, the ability to implement dynamic pricing, enabling convenient payments for multiple services (including EV charging), integrating with Maas (Mobility as a Service) platforms, aligning with kerbside strategies and optimising data analysis for a deeper understanding of the market. There is potential for parking as 'multi-use spaces' with areas becoming 'mobility hubs' rather than simply a place to leave a car.

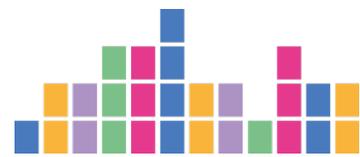
### **Waste Management**

In 2022/23, WCC managed just under **240,000 tonnes** of waste<sup>50</sup>. Just under **900kg** of household waste is collected per household each year, of which just **over half (50.06% in 2022/23)** 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 more than 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 resource and minimise waste and maximise reuse, recycling and composting<sup>51</sup>. Government 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 packaging waste are financially responsible for its management. Government had planned to implement its ideas during 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 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 2030 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 nine 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.

### Technology and delivery of services

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 increasingly contact Warwickshire County Council primarily via online tools.

There is likely to 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.

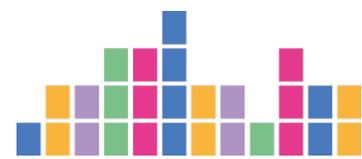
Internet of Things devices (connection of everyday physical objects to the internet) will increase. There will be networks of low-cost sensors and actuators for data collection, monitoring, decision making and process optimisation. Examples include smart-meter and smart-grid control of water and electricity. An example is Array of Things, a networked urban sensor project which is helping to understand the urban environment, infrastructure and activity in Chicago<sup>52</sup>.

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

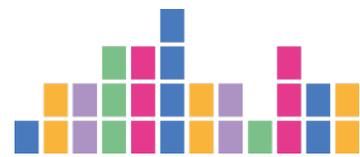


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<sup>50</sup> Department for Environment, Food & Rural Affairs (2018), Local Authority Collected Waste Statistics, <https://www.gov.uk/government/statistical-data-sets/env18-local-authority-collected-waste-annual-results-tables>

<sup>51</sup> Department for Environment, Food & Rural Affairs (2018), Our waste, our resources: a strategy for England,

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<sup>52</sup> Array of things <https://www.gov.uk/government/news/west-midlands-to-become-uks-first-large-scale-5g-testbed>