WORCESTERSHIRE LOCAL ENTERPRISE PARTNERSHIP PROFILE

June 2020

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Local Institutions, Productivity, Sustainability and Inclusivity Trade-offs (LIPSIT) is an ESRC (Economic and Social Research Council) funded collaborative project with Demos and the Universities of Birmingham, Cardiff, Surrey and Warwick. The aim of the project is to identify institutional and organisational arrangements at the regional level that tend to lead to the ‘good’ management of policy trade-offs associated with increasing productivity, and to make recommendations based on this. For further details of our research please visit www.LIPSIT.ac.uk.

Introduction

This profile of the Worcestershire Local Enterprise Partnership (WLEP) provides a detailed account of the region's devolved structure and data relating to key aspects of the economy, including: innovation, business, infrastructure, people, place and the environment.

Worcestershire Local Enterprise Partnership

The Worcestershire Local Enterprise Partnership (WLEP) is one of 38 (previously 39) private sector-led LEPs created to facilitate financial planning, regeneration, transport and labour market interventions at the local level. WLEP was one of the first standalone, single-county LEPs to be established with the DCLG in 2011. It is one of six LEPs in the West Midlands region and is made up of six administrative districts: Bromsgrove, Malvern Hills, Redditch, Worcester, Wychavon, and Wyre Forest. An overlapping geography exists with the Greater Birmingham and Solihull LEP covering the three northern districts of Worcestershire (Bromsgrove District Council, Redditch Borough Council and Wyre Forest District Council). The WLEP has a population of just over 592,000.

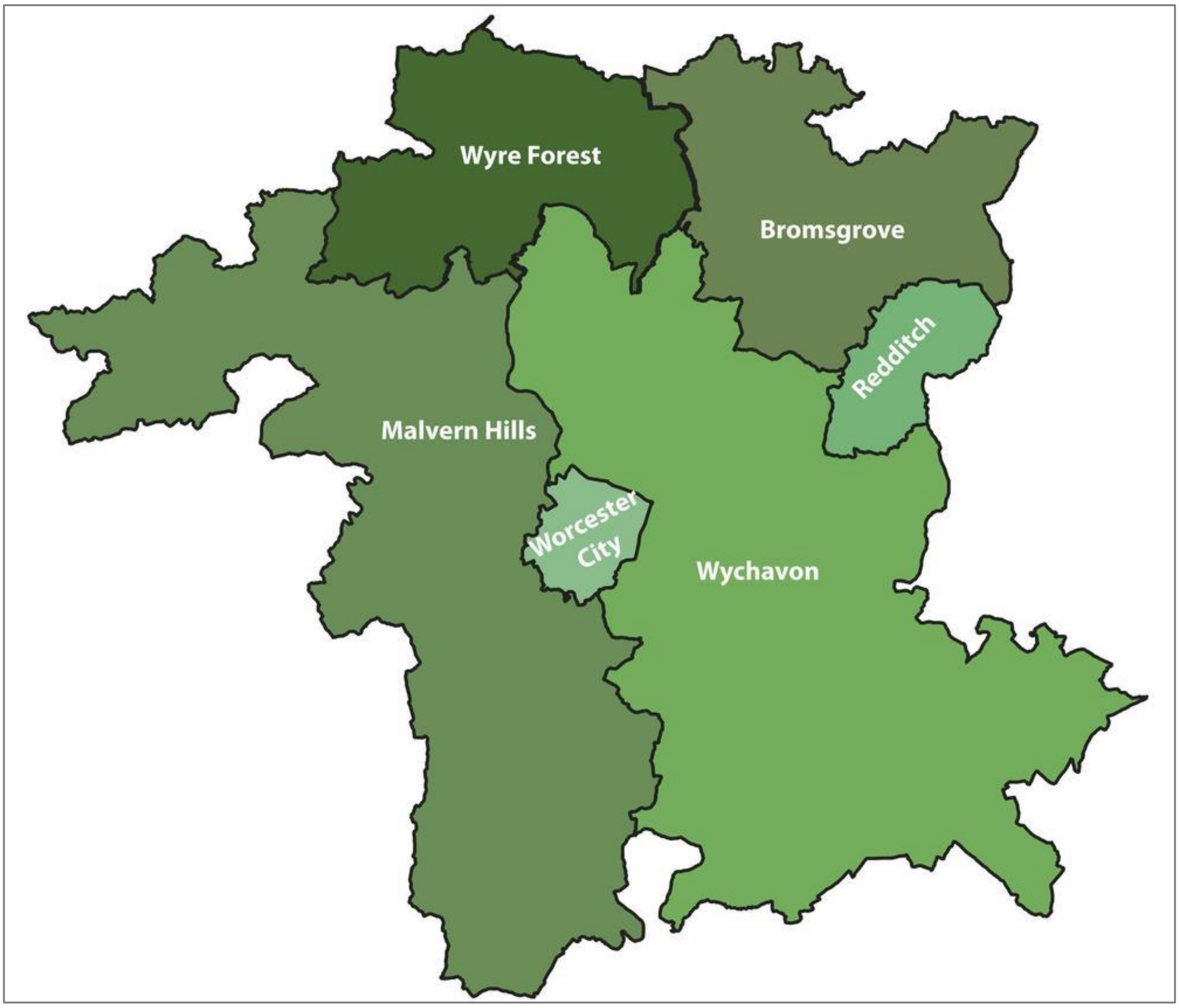


Figure 1: Geography of the Worcestershire LEP

The WLEP Board is made up of 14 members, the details of which can be found in Table 1 below.

Board Members	
Mark Stansfeld (LEP Board Chair)	Advisor and Interim MD for Enterprise, Three
Gary Woodman (LEP Board Chief Executive)	Former Head of Policy and Education at Herefordshire and Worcestershire Chamber of Commerce
Carl Arntzen (Chair of the Employment and Skills Board)	CEO for the Worcester Bosch operations in the UK and Ireland.
Cllr Simon Geraghty (Vice Chancellor, Local Authority Representative)	Leader of Worcestershire County Council
Prof David Green CBE (Higher Education Representative)	Vice Chancellor and Chief Executive of the University of Worcester
Nick Baldwin (Board representative on the Worcestershire Growth Fund Investment Decision Group)	Chair of the Office for Nuclear Regulation
Chris Walklett (Board representative on the Inward Investment Board)	Business & International Tax Partner for Bishop Fleming LLP
Stuart Laverick (Further Education Representative)	Principal and Chief Executive, Heart of Worcestershire College
Cllr Marc Bayliss	Leader of Worcestershire City Council
Cllr Frances Oborski	Cllr at Wyre Forest District Council
Sue Jordan	Fellow of The Chartered Institute of Personnel and Development and a Fellow of The Chartered Institute of Logistics and Transport
Nicola Whiting	Worcestershire's Commissioner for the UK Cyber Science and Innovation Audit
Jennifer Long	IT and Marketing Director for Price Pearson Chartered Accountants and Managing Director for IceBlue.
John Dillon	Owner of GJS Dillon Commercial Property Consultants

Table 1: WLEP Board Members

For a full overview of the WLEP's governance structure see **Appendix A**.

Following the government's commitment in 2013 to negotiate Growth Deals with every Local Enterprise Partnership (LEP), LEPs were tasked with developing multi-year strategic economic plans (SEPs) to demonstrate their commitment to the growth agenda and to set out their priorities in return for freedoms, flexibilities and influence over resources from government and a share of the Local Growth Fund.

Through the delivery of their first SEP in 2014 - *'World Class Worcestershire: Our Strategic Economic Plan'* - the WLEP set out their growth vision alongside their short- and mid- term strategies for delivery in line with three key themes (see **Appendix B** for a full account of objectives):

1. PLACE – creating a world class business location
2. PEOPLE – provide individual with world class skills
3. BUSINESS – develop world class competitive and innovation businesses

"To be an internationally recognised, highly competitive and innovative business location by stimulating investment, improving productivity and supporting the creation of sustainable economic growth and employment in Worcestershire"

WLEP Vision Statement 2014

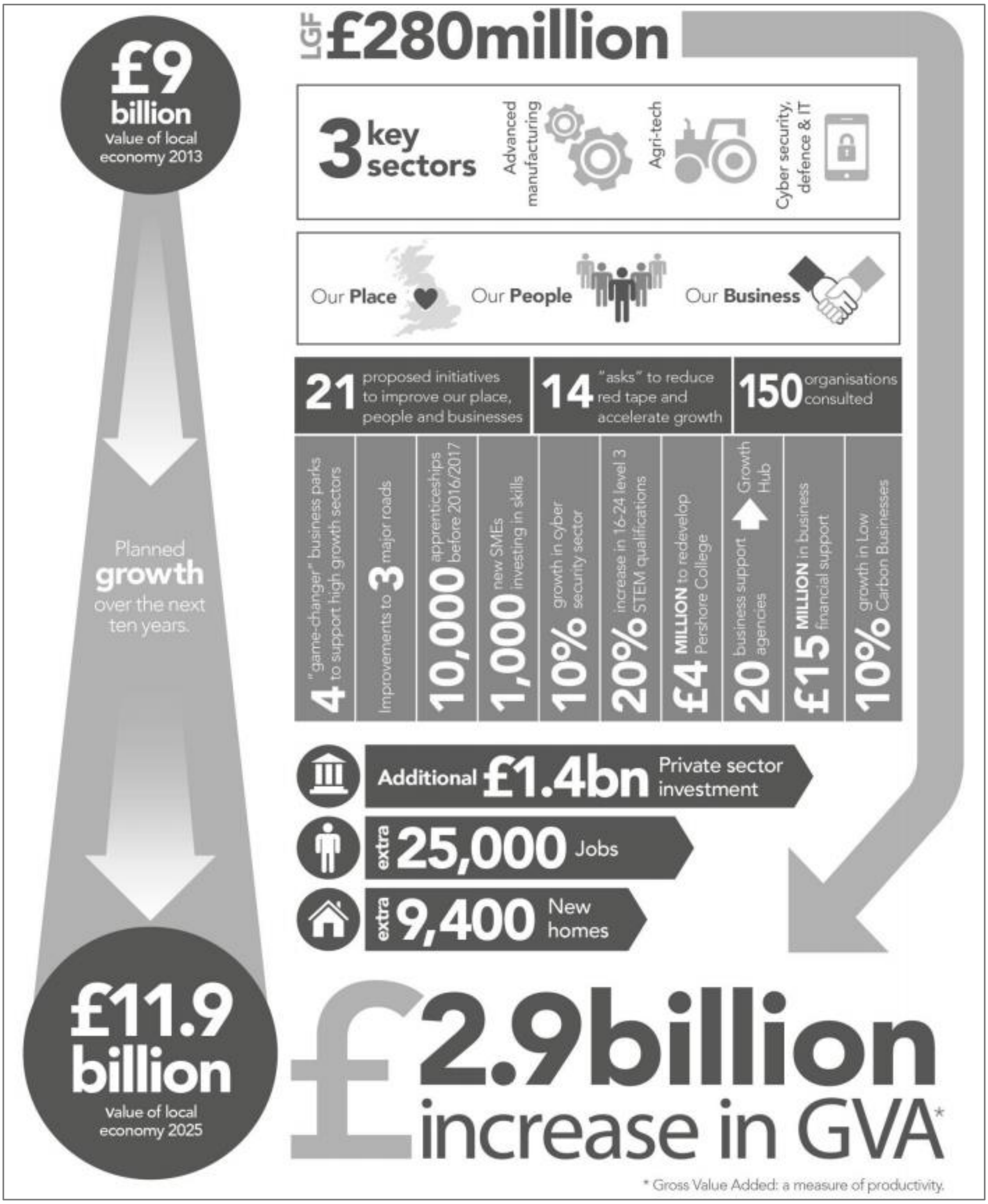


Figure 2: WLEP Growth Vision (Source: Worcestershire Strategic Economic Plan 2014)

Then in 2017, the WLEP appointed AMION Consulting to conduct a review of the 2014 Strategic Economic Plan – *Worcestershire Local Enterprise Partnership Strategic Economic Plan Review*. The specific requirements of the work were to:

- Review the original aims and ambitions of the 2014 SEP;
- Measure the extent to which the original SEP's targets have been achieved;
- Conduct an assessment of the changing socio-economic conditions with the WLEP area;
- Review the performance of priority sectors
- Identify and assess strategic issues and gaps that now need to be addressed.

External funding received by the Worcestershire LEP can be found in Table 2.

	Total (£m)	Per Head (£)
Regional Growth Fund 2011-12 to 2016-17	2.5	4.4
Growing Places Funding 2011-12	5.5	10
Growth Deals 2014-2021	71.7	124
European Structural and Investment Fund 2014-2020	58.2	100

Table 2: External Funding at WLEP level (Source: Smart Specialisation Hub 2019)

Additional funding secured include:

- *Local Majors Fund*: funding of £0.5 million from the DfT's large local majors programme to develop a business case for Phase 4 of the South Link Road at Carrington Bridge. The scheme aims to alleviate congestion in the town centre and open up commercial development land. Following receipt of the business case DfT will make a decision on whether to fund the scheme.

In 2019, Worcestershire LEP submitted their Local Industrial Strategy - Worcestershire Local Industrial Strategy: A Consultation Prospectus - to government. This document sets out a long-term plan to boost productivity by backing business to create high quality, well-paid jobs throughout the United Kingdom with investment in skills, industries and infrastructure.

Worcestershire LEP Key Statistics

In Table 2 below, figures for the WLEP are shown for a number of key indicators related to prosperity, inclusivity and sustainability. Figures for the UK are also provided as a baseline to assess regional performance according to latest data and over a 5-year period.

	WLEP		UK	
	2018	% change 2013-18	2018	% change 2013-18
GVA per/hour	81.8	**-7.8**	100	**2.0**
Median gross weekly pay for full-time workers	499.4	**10.3**	568.3	**9.8**
Employment rate 16-64	79.4	**4.2**	75.0	**5.3**
% of total employees in low pay sectors[1]	34.0	**-6.6**	33.7	**-1.7**
% of workers in high-skilled occupations (SOCs 1, 2, 3)	15.9	**6.1**	14.9	**5.5**
% of working-age population with NVQ Level 2+ quals.	76.0	**2.2**	74.9	**3.7**
% in-work households with and without children receiving child and/or working tax credits	19.3	**-22.1**	22.1	**-29.1**
20:20 ratio of median weekly pay (gross), ft workers	2.2	**-6.5**	2.27	**-0.02**
Ratio of lq. house price to lq. earnings[2]	8.7	**9.0**	7.3	**11.1**
Life Expectancy (females)	83.9	**0.6**	82.9	**0.2**

[1] UK = Data for Great Britain
[2] UK = Data for England and Wales

% of total connections receiving superfast broadband (>= 30 Mbits) (years = 2016-18)	54.3	**101.3**	55.3	**36.5**
% of workless households	12.0	**-13.0**	14.5	**-16.2**
CO2 per capita emissions (t) (years = 2017, 2013-17)	5.7	**-16.3**	4.5	**-23.7**
Total residual fuel consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	0.2	**-1.0**	0.3	**-9.3**
Total transport energy consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	0.81	**-0.6**	0.57	**-0.3**
Motor vehicle traffic per capita, vehicle miles[3]	7160	**2.8**	5083	**4.2**
Municipal waste generation, tonnes per capita[4]	0.37	**0.6**	0.66	**-4.3**
% of household waste sent for recycling/reuse/composting[5]	38.2	**0.8**	43.0	**-0.5**

Table 2: Key Statistics

This data was used to develop a regional typology to assess the productivity, inclusivity and sustainability of all UK regions in relation to the nature of their economies and their outcomes over time. Table 3 below shows the results of this typology for the WLEP, indicating its performance in relation to all other regions in England (LEPs and CAs), Wales and Scotland.

	LEVELS (2018)			CHANGE (2013-2018)		
	PROSPERITY	**INCLUSIVITY**	**SUSTAINABILITY**	**PROSPERITY**	**INCLUSIVITY**	**SUSTAINABILITY**
BCLEP	MEDIUM	HIGH	MEDIUM	MEDIUM	HIGH	MEDIUM

Table 3: BC LEP performance on prosperity, inclusivity and sustainability (levels and change)

LOW = Q1; MEDIUM = Q2 and Q3; HIGH = Q4

The results indicate the following for the WLEP:

Prosperity - performance medium and improving in line with other regions

Inclusivity - performance high and improving above average compared to other regions

Sustainability - performance medium and improving in line with other regions

[3] UK = Data for Great Britain
[4] UK = Data for England, 2014-18
[5] UK = Data for England, 2014-18

PROSPERITY	**81.8** GVA per/hour (index) (UK=100) 7.8% 2013-18	**£499.4** Median gross weekly pay for full-time workers 10.3% 2013-18	**79.4%** Employment rate 16-64 4.2% 2013-18	**34.0%** of total employees in low pay sectors 6.6% 2013-18	**15.9%** of workers in managerial, professional and technical occupations 6.1% 2013-18	**76.0%** of working age population with NVQ2+ quals. 2.2% 2013-18
INCLUSIVITY	**19.3%** In-work households receiving child and/or working tax credit 22.1% 2013-18	**2.2** 20:20 ratio of median weekly pay 6.5% 2013-18	**8.7** Ratio of lower quartile house price to lower quartile earnings 9.0% 2013-18	**83.9** Female life expectancy 0.6% 2013-18	**54.3** of premises with access the superfast broadband 101.3% 2016-18	**12.0%** of workless households 13.0% 2013-18
SUSTAINABILITY	**5.7** CO2 per capita emissions 16.3% 2013-17	**0.2** Total residual fuel consumption (tonnes of oil equivalent per capita) 1.0% 2013-17	**0.81** Total transport energy consumption (tonnes of oil equivalent per capita) 0.6% 2013-17	**7160** Motor vehicle traffic (vehicle miles per capita) 2.8% 2013-18	**0.37** Municipal waste generation (tonnes per capita) 0.6% 2013-18	**38.2** of household waste sent for recycling/reuse/composting 0.8% 2013-18

Productivity in Worcestershire is considerably less than the national average. Looking at GVA/hour as the best proxy measure of productivity available, Figure 4 shows that GVA/hour worked has been consistently less than the UK average over a 5 year period (2013-18). In 2018, GVA/hour in the Worcestershire LEP was £28.7 compared to £35.0 for the UK. It should be noted that the data used in Figure 4 should not be used to compare GVA/hour between years but only within years.

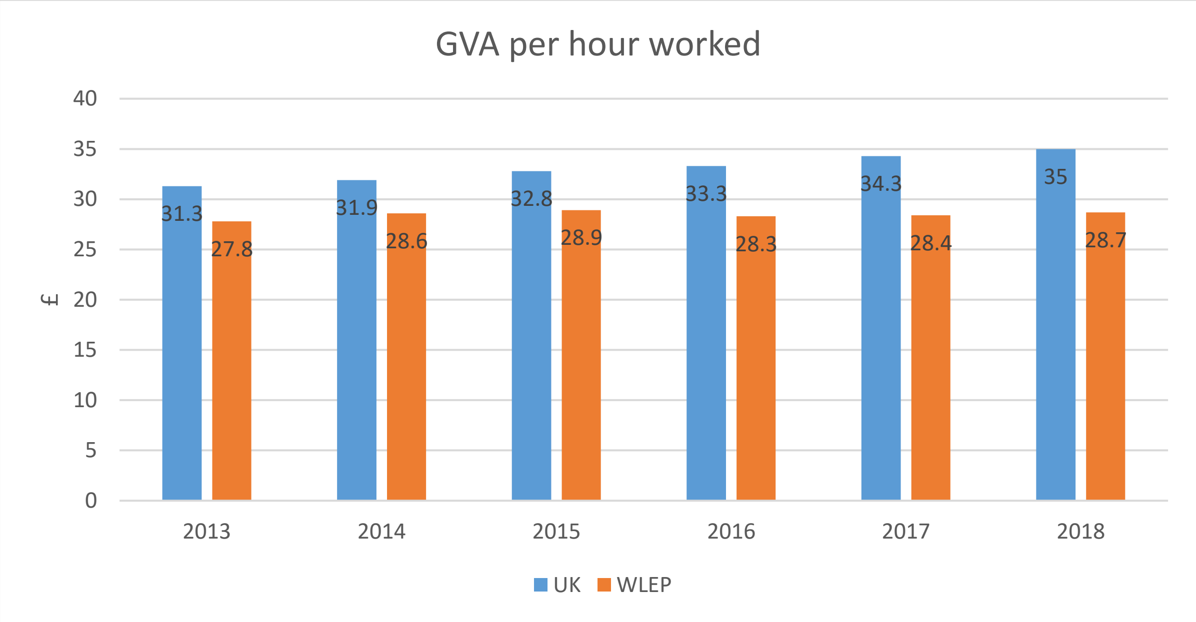


Figure 4: GVA per hour worked (£), nominal (smoothed) (Source: ONS)

Now turning to look at the growth of GVA/hour in Worcestershire over a 5-year period, Figure 5 below provides a rather negative outlook of performance. Growth in GVA/hour in the WLEP stagnated between 2013 and 2015 in line with UK average, but then declined in real terms until 2017 when growth fell considerably below UK average. Between 2017 and 2018 GVA/hour in Worcestershire began to increase but in real terms was still well below where GVA/hour stood between 2013 and 2015.

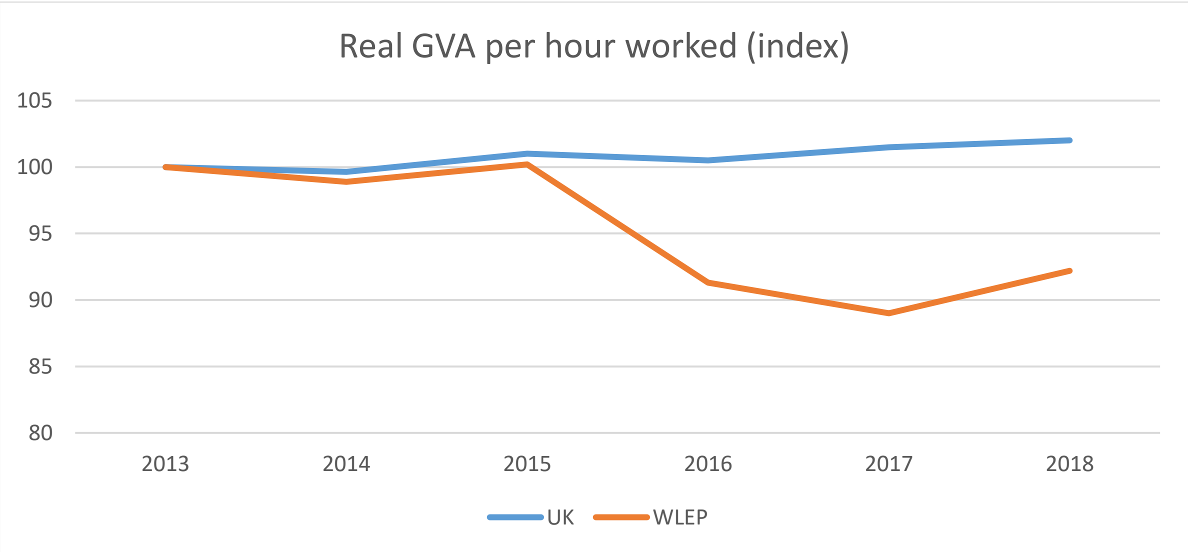


Figure 5: Real GVA per hour worked (index) (Source: ONS)

1. Innovation

Figure 6 and Tables 4-5 below provide an initial indication of the strength of the innovation environment in the WLEP. Figure 6 gives an approximation of the extent to which firms are engaged in different types of innovation activity in the WLEP area, including the lowest and highest proportions for each metric of all LEP areas as benchmarks. This data shows that the WLEP performs strongly in innovations related to 'product/service innovation' and 'innovation sales'. The WLEP performs particularly less well in innovations related to 'design' and 'radical innovation'.

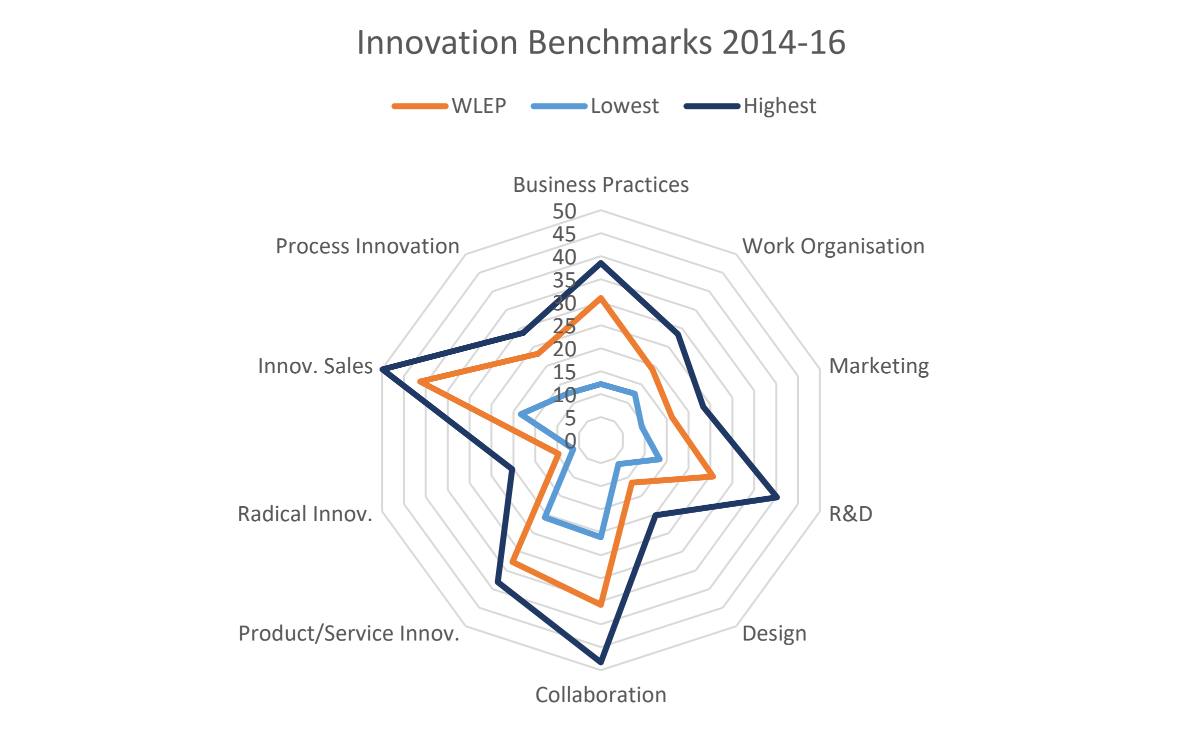


Figure 6: Innovation Benchmarks (Source: Roper and Bonner, 2019)

	Business Enterprise Spending on R&D		Higher Education Spending on R&D	
	£/FTE	Benchmark relative to average LEP value	£/FTE	Benchmark relative to average LEP value
Worcestershire	1739	2.15	5	0.02

Table 4: Spending on R&D, 2014 (Source: Smart Specialisation Hub)

	Interactions between HE Institutions and Business			
	Consultancy	Benchmark relative to average LEP value	Contract Research	Benchmark relative to average LEP value
Worcestershire	165	0.03	481	0.06

Table 5: Interactions between HE Institutions and Business: Income for consultancy and contract research for SME's and large businesses, HEBCI, 2014/15-2015/16 (average over 2 years) (Source: Smart Specialisation Hub)

Table 4 above shows that the WLEP performs above average in terms of business enterprise spending on R&D, with £1739 spent for each full-time equivalent job and a benchmark relative to the average LEP value of 2.15. Also shown in Table 4 is higher education spending on R&D where the WLEP performs poorly with only £5 spent for each full-time equivalent job and a benchmark relative to the average LEP value of 0.02. The WLEP also performs much less well than the average for all LEPs on the number of interactions between HEIs and business in terms of consultancy (a total of 165 interactions between 2014 and 2016 and a benchmark of 0.03) and contract research (a total of 481 interactions between 2014 and 2016 and a benchmark of 0.06) as shown in Table 5.

The **University of Worcester** is WLEP's only university with a total of 10,798 students enrolled between in 2017/18 (Source: HESA). The University of Worcester is not considered a research intensive university, reflected in Figure 7 below which shows the WLEP falling well below the LEP average for involvement in innovation research production.

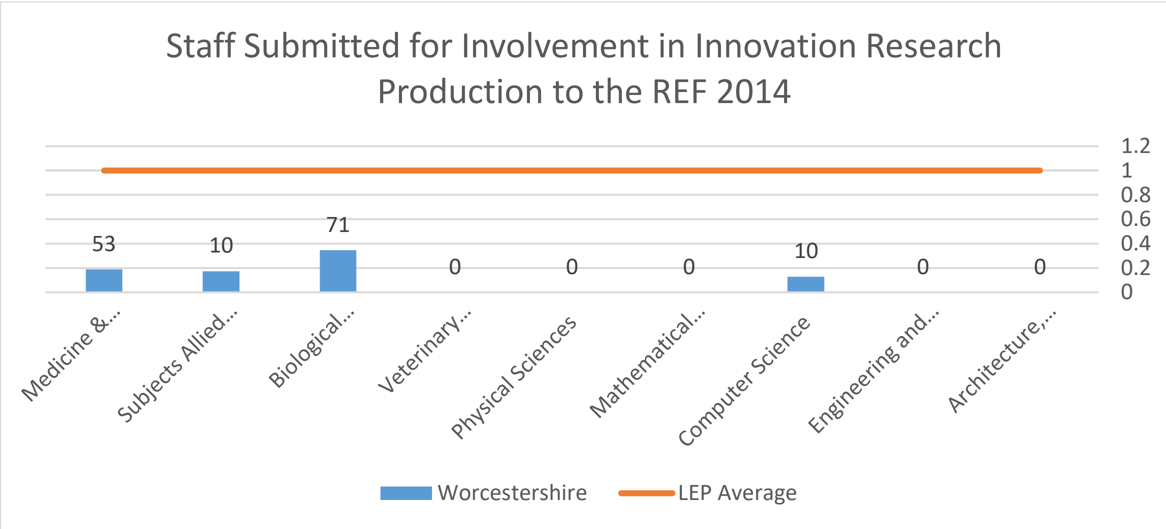


Figure 7: Staff submitted for involvement in innovation research production to the REF 2014 (Source: [Smart Specialisation Hub](#))

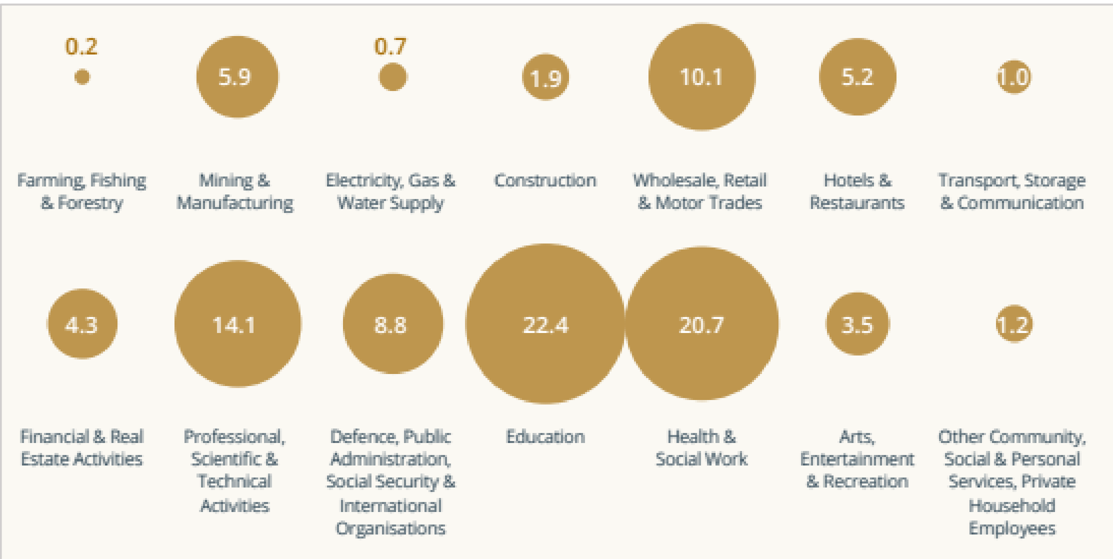


Figure 8: Employment of first degree graduates across industry sectors in the WLEP (%) (Source: [Smart Specialisation Hub](#))

Figure 8 provides a breakdown of employment of First Degree Graduates across industry sectors. The largest sector is Education (22.4%) followed by Health and Social Work (20.7%).

Relative to the LEP average, the WLEP has low numbers in employment in science and technology sectors as shown in Figure 9.

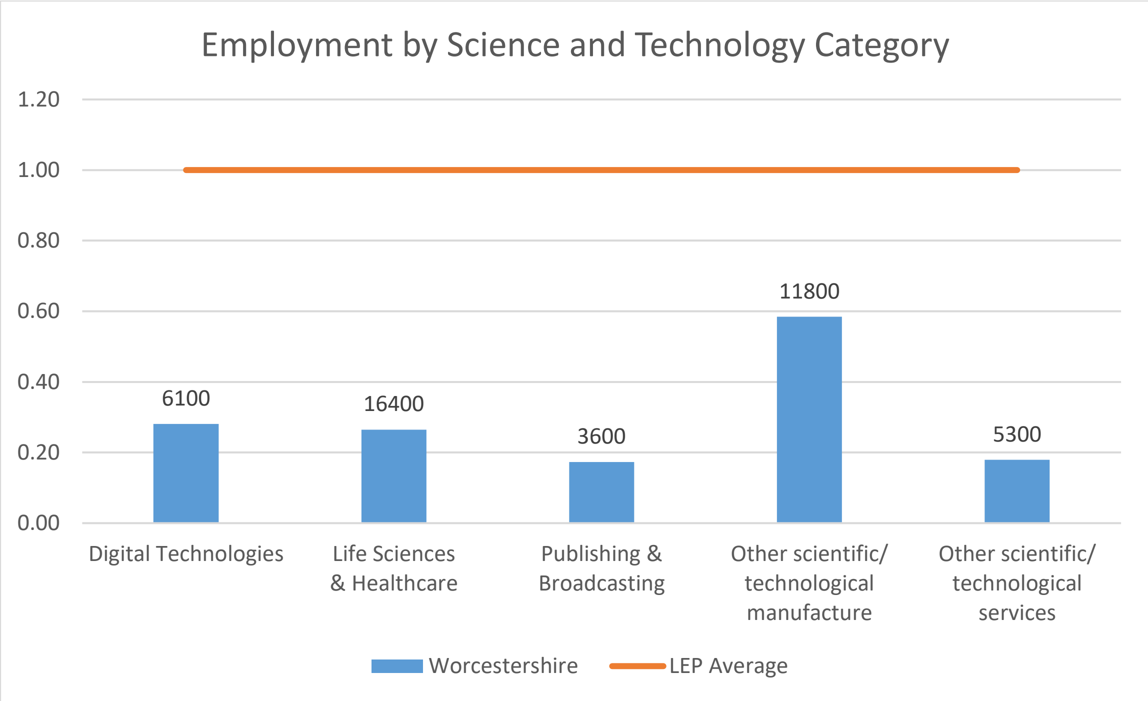


Figure 9: Employment by science and technology category (Source: Smart Specialisation Hub)

WLEP's research, development and innovation assets include:

- UK 5G testbed
- Cyber Resilience Alliance
- BetaDen Technology Accelerator
- University of Worcester
- Malvern Hills Science Park
- Whyche Innovation Centre

2. Business

The WLEP's business base currently stands at 33,065 (558 per 10,000 population compared to 442 for the UK in 2018). This is well above the national average. Business births per 10,000 population for the WLEP is also higher than the national average at 71 compared to 57 in 2018 (see Table 6). In 2018, however, business deaths were exceeding business births showing that the WLEP is on a downwards trajectory for growing its business base (see Figure 10). Figure 11 shows the proportion of start-ups scaling <£500k to £1m+ in 3 years (2015-18) and survivors scaling £1-2m to £3m+ in 3 years (2015-18). On the growth of start-ups, the data shows that the WLEP falls just below the English average at 1.8% compared to 2.0%. On the growth of existing businesses, WLEP falls above the average for England at 8.2% compared to 7.6%. Between 2010-13 and 2015-18, WLEP consistently had a lower high growth firm incidence rate that the UK average (see Figure 13).

	Business stock (2018)	Business stock per 10,000 population	Start-ups per 10,000 population
UK	2939520	442	57
Worcestershire	33065	558	71

Table 6: Business Stock and Start-ups (Source: ONS Business Demography, 2018)

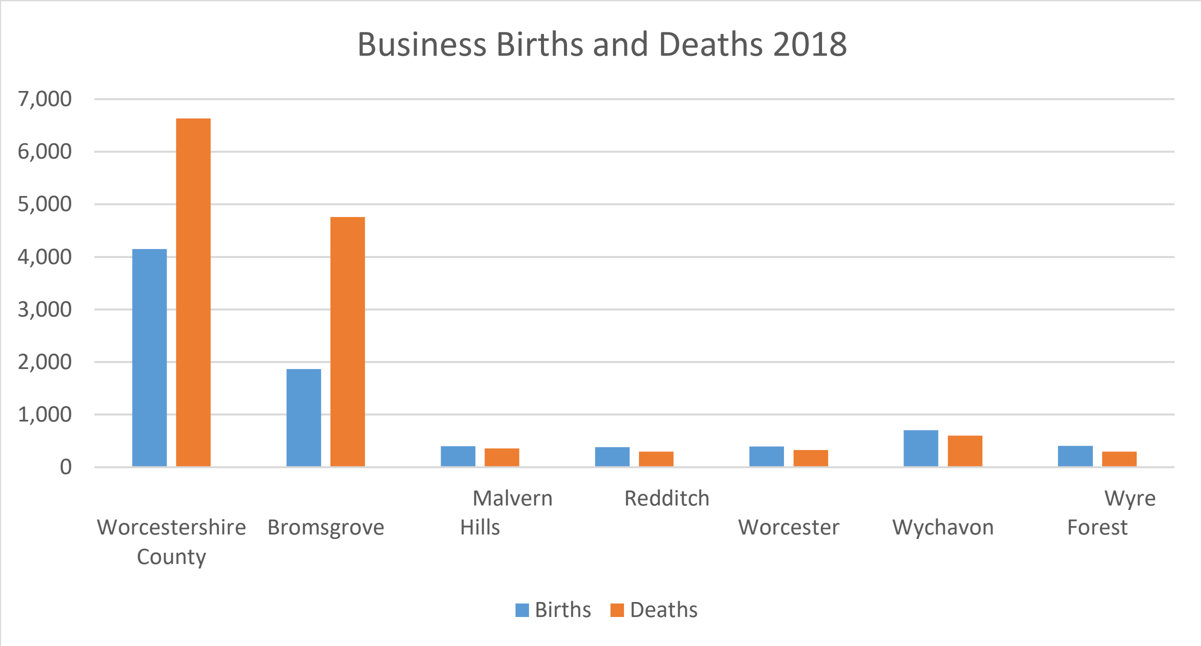


Figure 10: Business Births and Deaths (Source: ONS Business Demography, 2018)

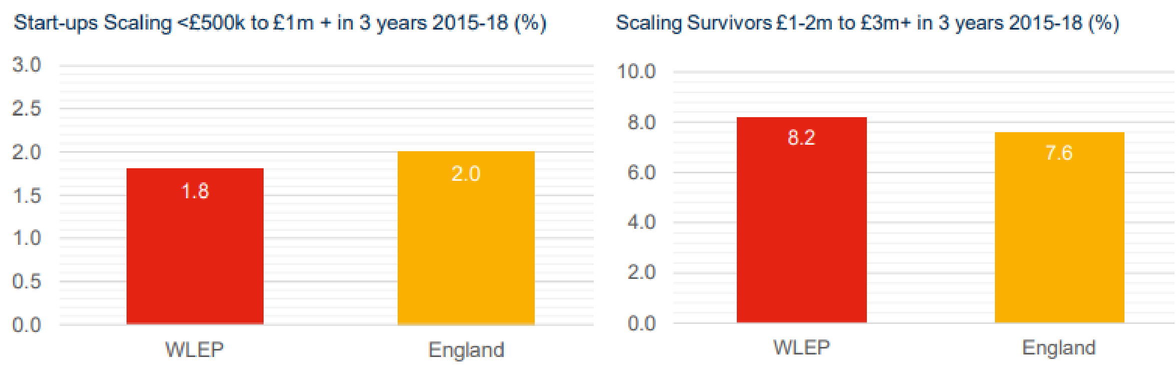


Figure 11: Growth of start-ups scaling <£500k to £1m+ in 3 years 2015-18 (Source: Enterprise Research Centre, 2018)

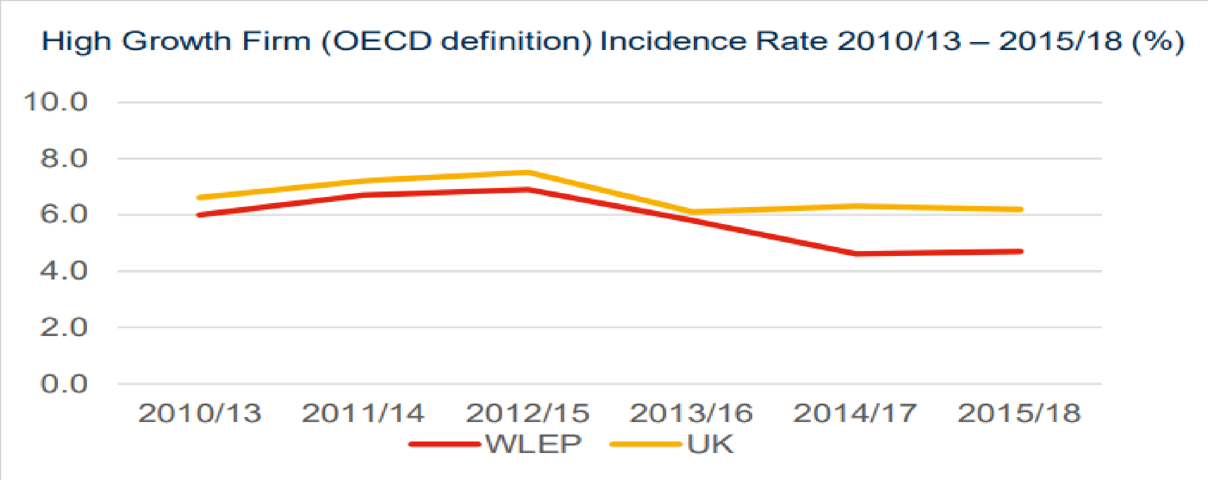


Figure 12: High growth firm incidence rate 2010/13 – 2015/18 (%) (Source: Enterprise Research Centre, 2018)

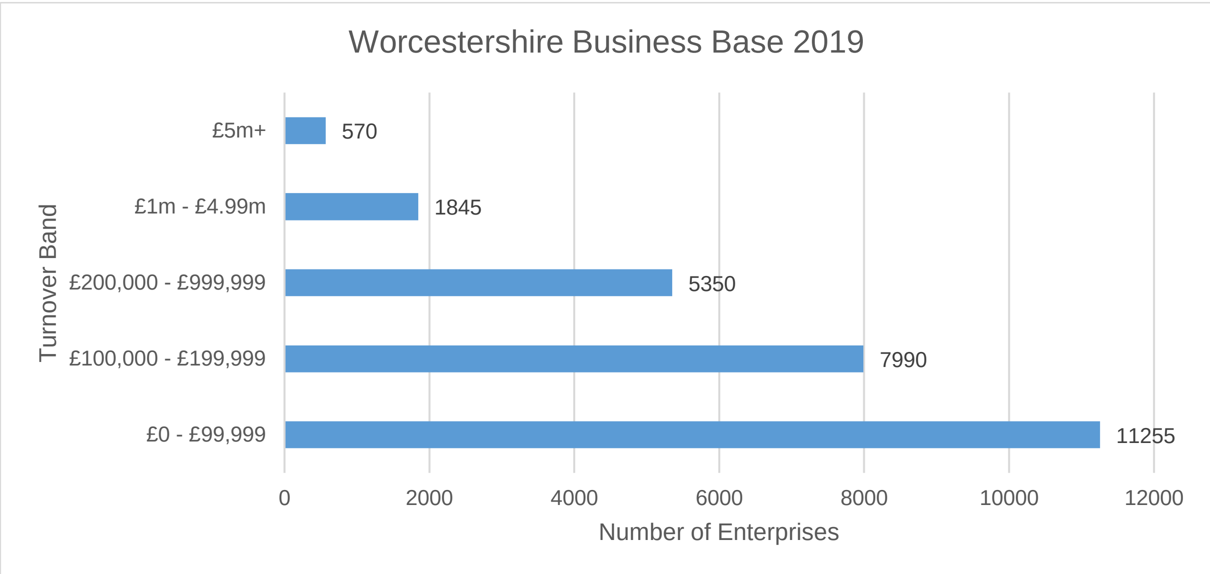


Figure 13: WLEP Business Base 2019 (Source: ONS Business Demography 2019)

	Worcestershire (number)	Worcestershire (%)
Micro (0 to 9)	24240	89.8
Small (10 to 49)	2250	8.3
Medium (50 to 249)	405	1.5
Large (250+)	110	0.4
Total	**27005**	**-**

Table 7: Business Counts of Enterprises 2019 (Source: ONS)

Table 7 shows that the vast majority of WLEP businesses enterprises (89.8%) are small firms with 0 to 9 employees. Only 0.4% of enterprise firms in the WLEP employ more than 250 people.

Figure 14 shows jobs by broad sector for the WLEP and Great Britain. The WLEP has a strong business base focused on 'manufacturing' (13.3% of total employment), 'health' (13.3% of total employment) and 'business administration and support services' (9.4% of total employment). Other sectors the WMCA scores higher than the national average on, include: 'retail' (9.4%), 'education' (9.0%), 'construction' (5.1%), 'arts, entertainment, recreation and other services' (4.7%) and 'wholesale' (4.7%) and motor trades (2.4%).

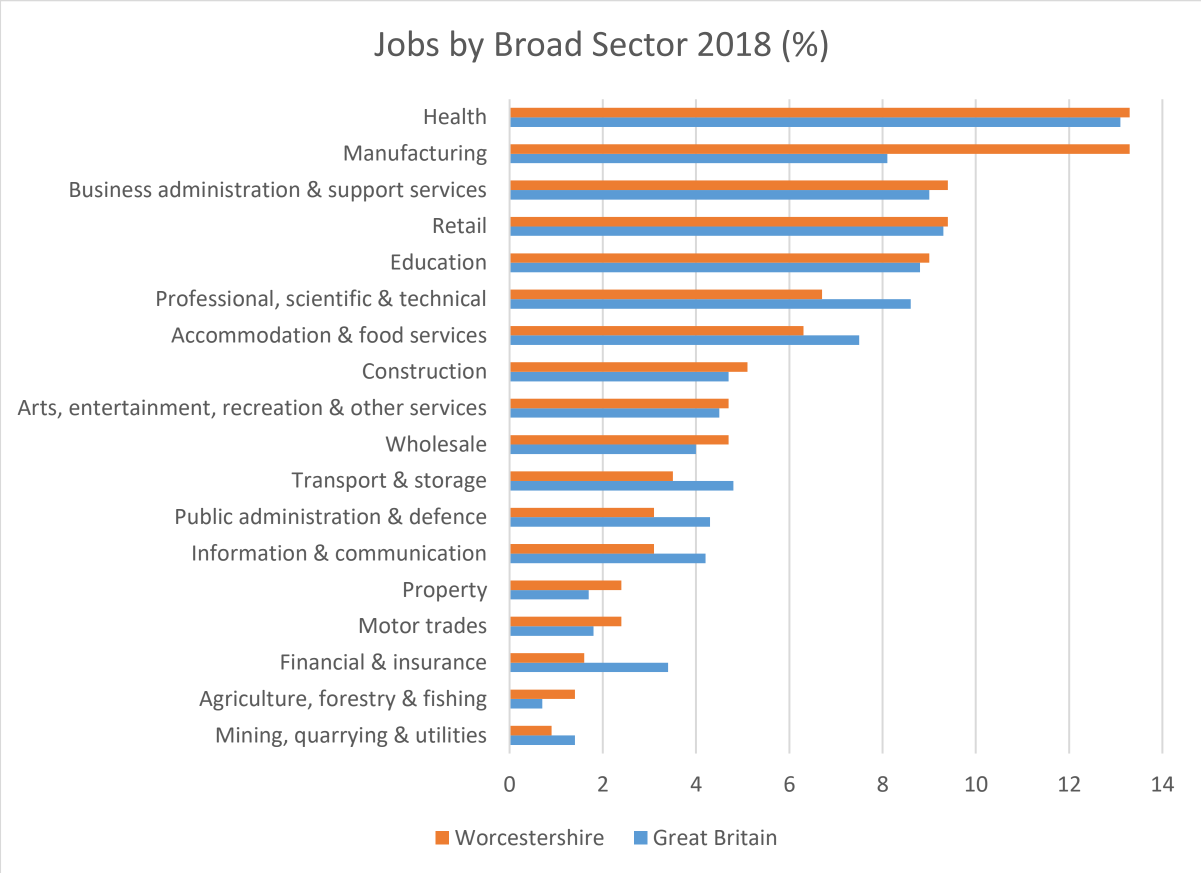


Figure 14: Jobs by broad sector (Source: BRES, 2018)

At the time of the WLEP's publication of their Local Industrial Strategy in 2019, Worcestershire had secured 51 FDI projects over the 3 years previous, generating over 1,500 new jobs and safeguarding 900 (Source: Worcestershire Local Industrial Strategy)

3. Infrastructure

"Worcestershire is at the heart of the UK with excellent connections via road (M5, M42 and M50 motorways), rail (including, eventually, access to HS2) and air (particularly Birmingham International and good connections to Heathrow). The county has benefited from recent infrastructure investment, for example 'Pinch Point' funding to alleviate congestion black spots including motorway interchanges. In addition, plans are afoot to develop a 'Managed Motorway' system on the M5 between Junction 4A (M42 Bromsgrove) and J6 (Sixways)." (Source: Worcestershire LEP Website)

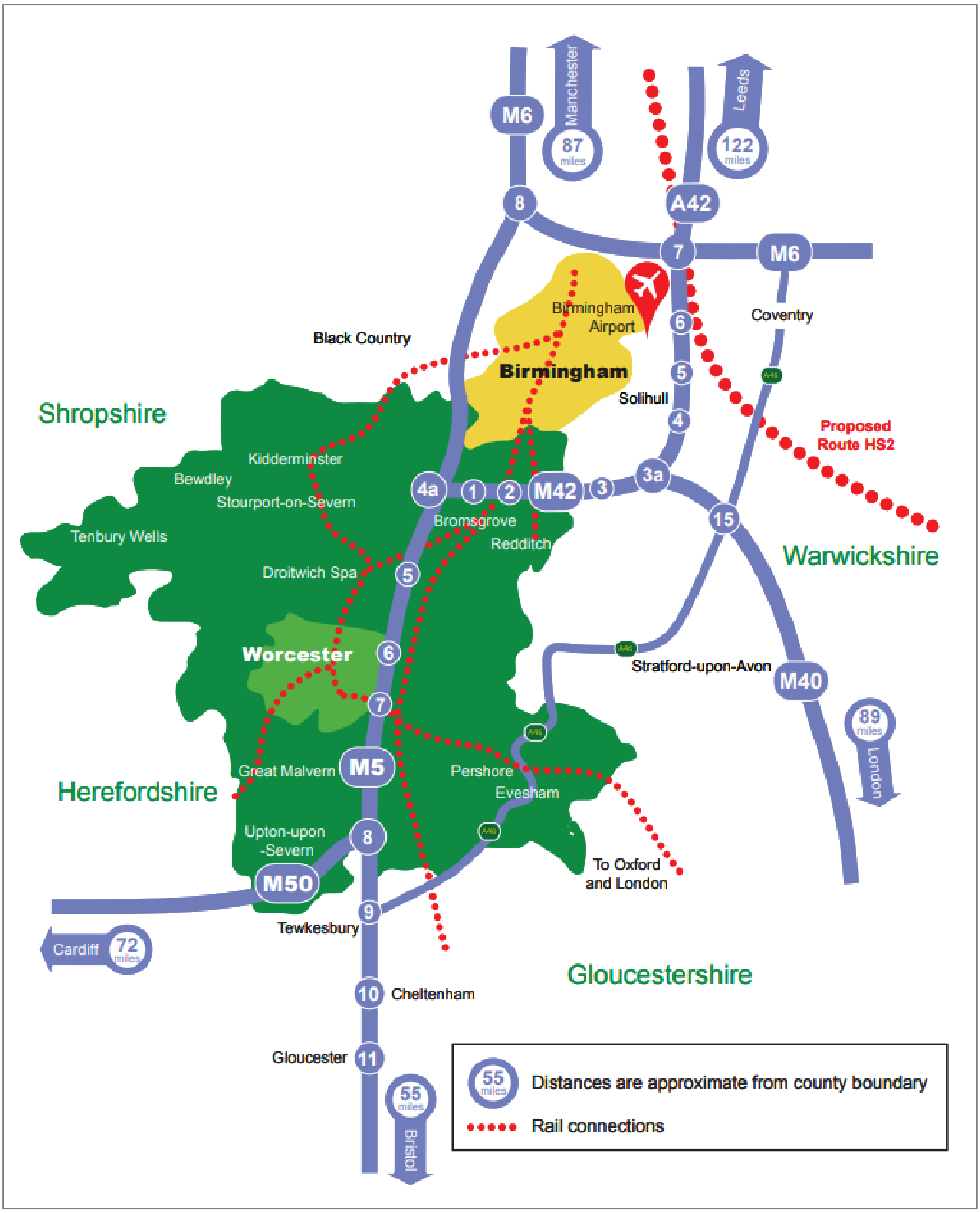


Figure 15: Worcestershire Infrastructure Map (Source: [Worcestershire LEP Website](#))

Work has started on site at Worcestershire Parkway Station. The station was given the official stamp of approval by Department for Transport at the end of January 2017. Specialist contractor Buckingham Group Contracting Ltd has been awarded the design and build contract for the scheme. The scheme is set to provide huge benefits to Worcestershire's rail connectivity by tackling Worcestershire's exclusion from the Cross Country network, Bristol to Birmingham to North West and North East. The station forms part of the Local Transport Plan and Worcester Transport Strategy and will be completed and opened in Winter 2018/19.

The Hoobrook Link Road was officially opened by partners in February 2017. The new £16m link road has helped to significantly reduce congestion and journey times while also improving access to neighbouring employment and housing land.

Construction has started on the Phase 5 expansion of Malvern Hills Science Park. Worcestershire LEP has invested a total of £4million to provide 16,000sq ft of floor space, available to new companies or existing tenants seeking to grow their business.

A planning application has been submitted to raise the road and install a new drainage system on New Road in Worcester, to keep the road open for longer in future flood events. The £1.2m scheme will see the road raised between Worcestershire County Cricket Club's entrance and the Premier Inn and forms part of Worcestershire LEP's £4m total investment into the county's flood alleviation programme. Work has also started on reducing the risk of flooding in Upton-Upon-Severn, following investment from Worcestershire LEP. Worcestershire County Council reported that at the height of flooding the 2007 floods cost Worcestershire £6.4m per week.

Worcestershire LEP is continuing to work with the A46 working party to support ambitious plans for improving traffic flow along the busy road. The group is also working to reduce congestion at junction nine of the M5.

LOOKING FORWARD WE WILL:

Worcestershire LEP will be delivering the projects agreed in the LEP's successful bid for Growth Deal 3.
An additional £17.5million was agreed for projects including:

- A38 corridor improvements to speed up journey times and accelerate the delivery of housing and job growth in the area;
- Pershore Northern Link Road developments, which will enable development of commercial land and provide access for up to 700 new homes;
- Churchfields Urban Village highway infrastructure, which will relieve traffic congestion along A456 and A51 and provide access for up to 300 new homes; and
- A new Engineering Faculty working with a partnership that includes Heart of Worcestershire College, which will see an extra 300 students per annum by 2021.

Worcestershire LEP will continue to support the opening of The Kiln, in Worcester. The Kiln will act as a co-worker space for the creative and digital industry. Worcestershire LEP will invest £195,000 to refurbish the co-worker space enabling business productivity improvements and generating new business.

Construction of the £100million Redditch Gateway business park in Worcestershire is set to begin in early 2018. The one million sq ft scheme will increase economic growth by creating up to 2,300 jobs and developing high-quality headquarters-style manufacturing and distribution facilities.

Worcestershire LEP will continue to support Worcestershire County Council in delivering further phases of development taking place on the Southern Link Road. The Department for Transport announced a £54.5m fund for dualling Carrington Bridge, en route from West Worcester to the M5, improving journey times and boosting the local economy.

In September 2017, Worcestershire LEP announced plans to build one of the UK's first 5G test beds in Worcestershire. Developed in partnership with the University of Surrey's 5G Innovation Centre, the new test bed will focus on the 5G commercial applications with found members and leading companies, QinetiQ, Worcester Bosch and Yamazaki Mazak. The applications will enable innovation in the cyber security sector and Industry 4.0.

On Thursday 6 July 2017, detailed plans were revealed to transform Kidderminster railway station into a landmark gateway. The station, which has direct trains to the heart of London and Birmingham, was used by 1.6 million people in 2016, with numbers predicted to rise 50% within 5 years. Worcestershire LEP has invested a total of £2.5million in the redevelopment alongside Greater Birmingham and Solihull LEP's investment of £1.8million.

Worcestershire LEP will support the development of a business case for investment in the North Cotswold Railway Line to achieve faster and more regular journeys to and from London.

Figure 16: A selection of key infrastructure projects (Source: Worcestershire 2017 Annual Report)

Housing stock in the WLEP has been rising in recent years, as can be seen in Figure 17. It is rising at a faster pace than the average for England. Between 2017 and 2018, the number of dwellings in the WLEP rose by 1.1% compared to 0.9% for England.

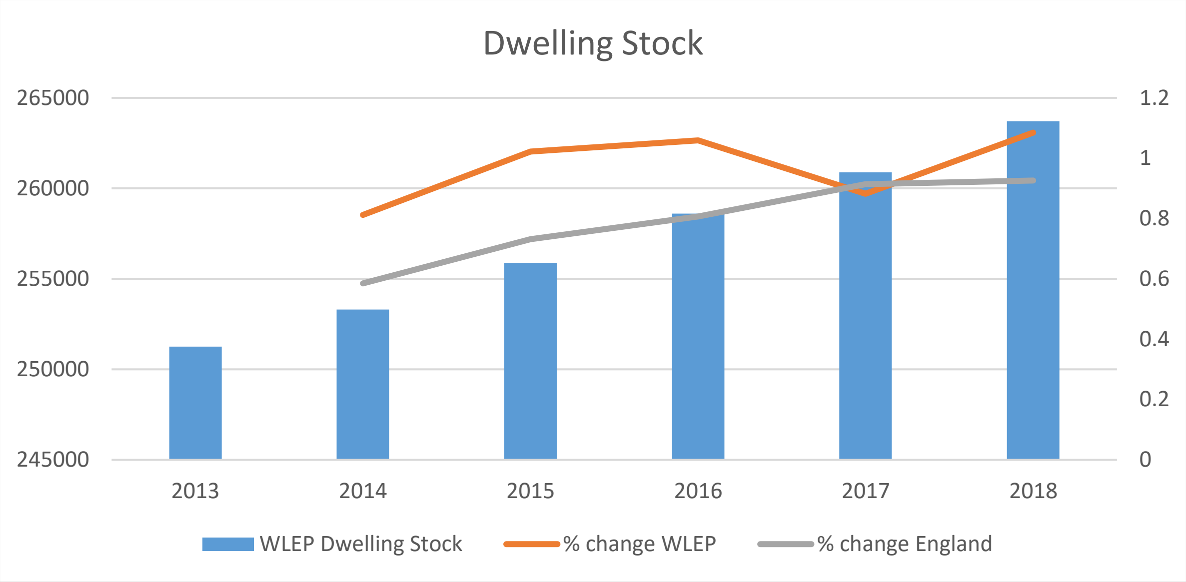


Figure 17: Dwelling Stock (Source: Ministry of Housing, Communities and Local Government, 2018)

Between 2014 and 2018 housing costs in the WLEP were increasing faster than local salaries (see Figure 18). This did change, however, between 2018 and 2019 when earnings rose just above the rate for house prices.

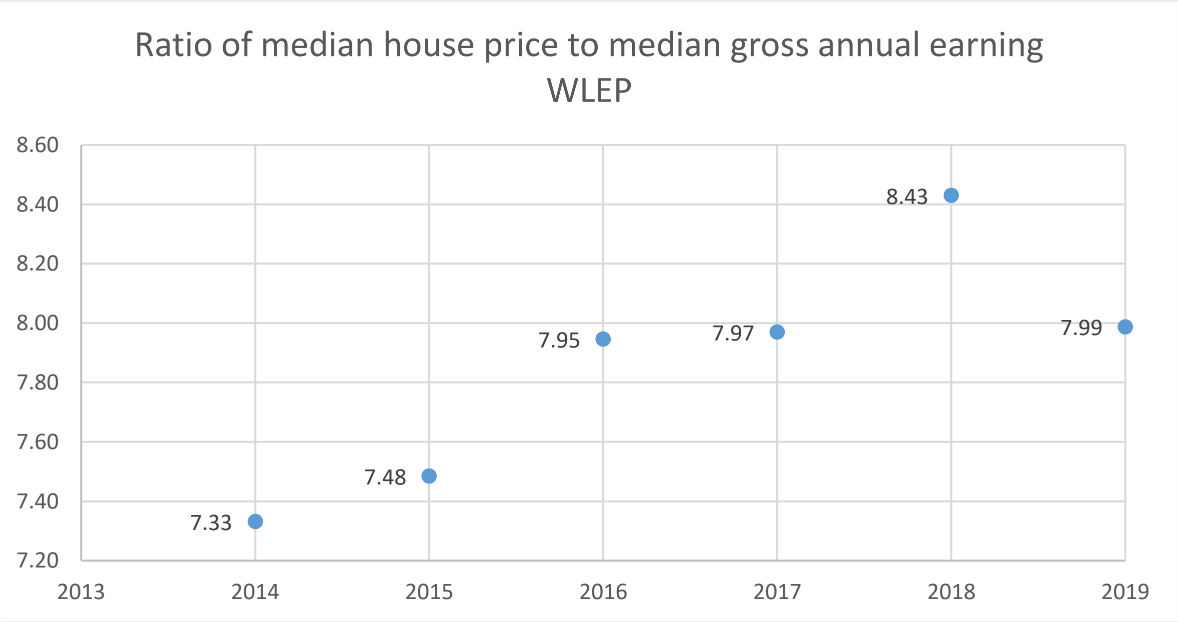


Figure 18: Ratio of median house price to median gross annual earnings in the WLEP

Superfast broadband connectivity in the WLEP is lower than the average for the UK at 54.3% compared to 55.3% respectively.

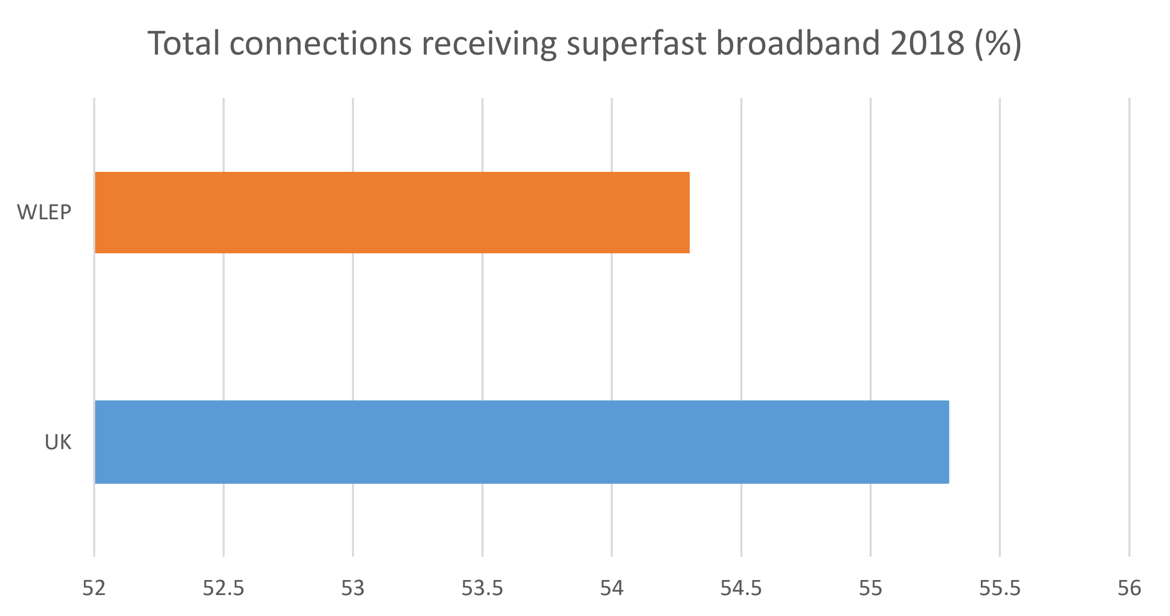


Figure 20: Total connections receiving superfast broadband (Source: OFCOM, Connected Nations 2018)

In 2018, Worcestershire LEP together with a team of 5G and Industry 4.0 experts won a grant of £4.8m to focus on ways to increase industrial productivity through preventative and assisted maintenance using robotics, big data analytics and AR over 5G.

4. People

	WLEP	WLEP (%)	Great Britain (%)
All people aged 16-64	353600	59.7	62.7
Economically Active	297800	80.8	78.9
In Employment	288000	78.0	75.7
Employees	245000	67.0	64.7
Self Employed	43000	11.0	10.8
Unemployed	9900	3.3	3.9

Table 8: Working age population, employment and unemployment 2018 (Source: ONS Annual Population Survey)

	WLEP (%)	Great Britain (%)
NVQ4+	37.1	39.3
NVQ3+	58.7	57.8
NVQ2+	77.4	74.9
NVQ1+	87.3	85.4
Other Qualifications	5.4	6.8
No Qualifications	7.3	7.8

Table 9: Qualifications 2018 (Source: ONS Annual Population Survey)

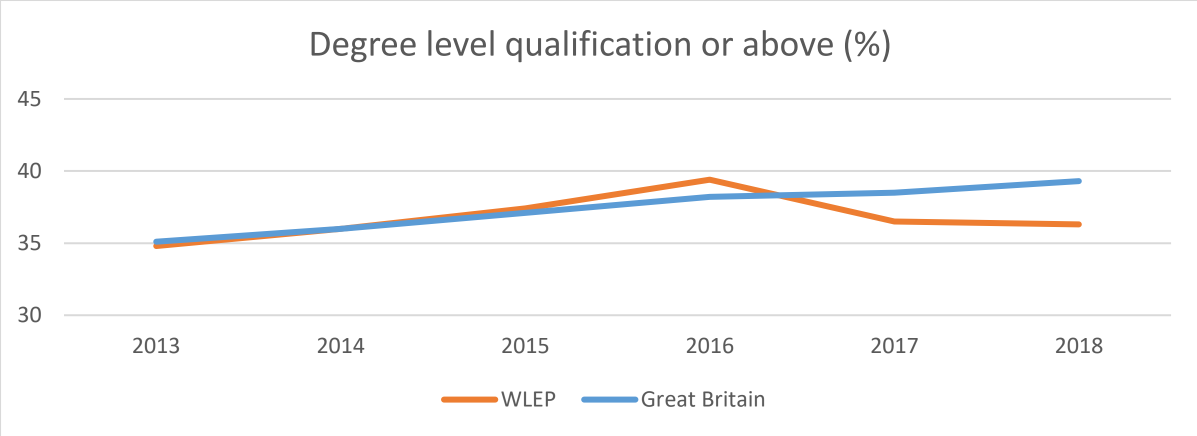


Figure 21: Population aged 16-64 with NVQ4+ qualifications (Source: ONS)

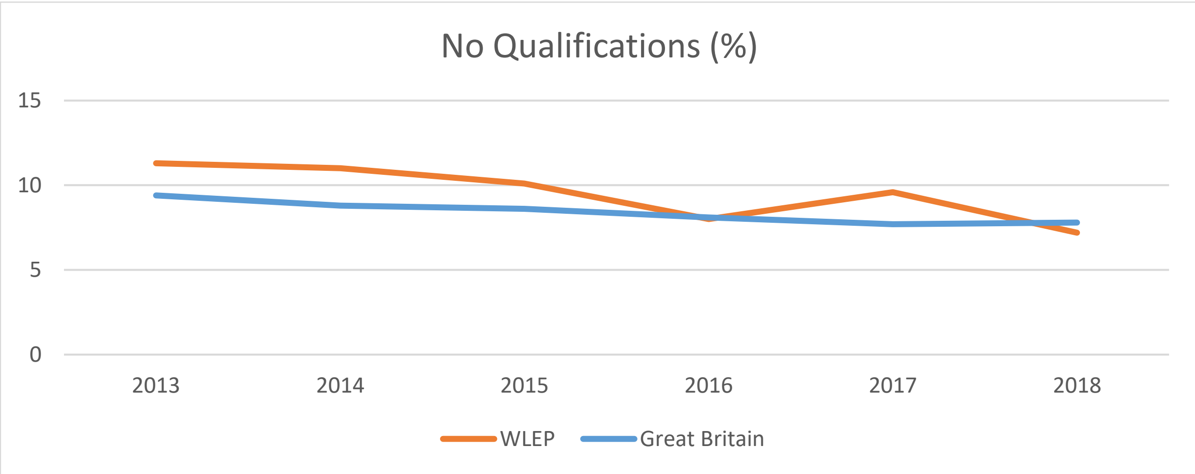


Figure 22: Population aged 16-64 with no qualifications (Source: ONS)

	Stay for study and employment	Leave for study, return for employment	Leave for study, do not return	Stay for study, leave for employment
Worcestershire	15.7%	26.3%	52.8%	5.3%
National Average	29.3%	30.4%	34.3%	6.0%

Table 10: Graduate retention (Source: HESA, 2018)

5. Place

As shown in Table 11, in 2017 the WLEP had 900,000 day visitors and 2.2m overnight visitors, and visitor spending in the region stood at £127m.

	2014-2016 average	2015-2017 average
Visitor Day Trips	0.9m	0.9m
Visitor Night Trips	2.4m	2.2m
Visitor Spend	£126m	£127m

Table 11: Day visitors, overnight visitors and visitor spend

The WLEP is an area with relatively low levels of deprivation. According to the 2019 Index of Multiple Deprivation (IMD) for England, only 12.6% of the WLEP falls within the 20% more deprived areas nationally. In contrast, 24.2% of the WLEP falls within the 20% least deprived areas (see Table 12). The distribution of deprivation in the WLEP is shown in Figure 24.

2019 IMD	**No.**	**%**
10% most deprived	18 (out of 364 LSOAs)	4.9%
20% most deprived	46 (out of 364 LSOAs)	12.6%
10% least deprived	39 (out of 364 LSOAs)	10.7%
20% least deprived	88 (out of 364 LSOAs)	24.2%

Table 12: 10% and 20% most and least deprived areas in the WLEP (Source: IMD 2019)

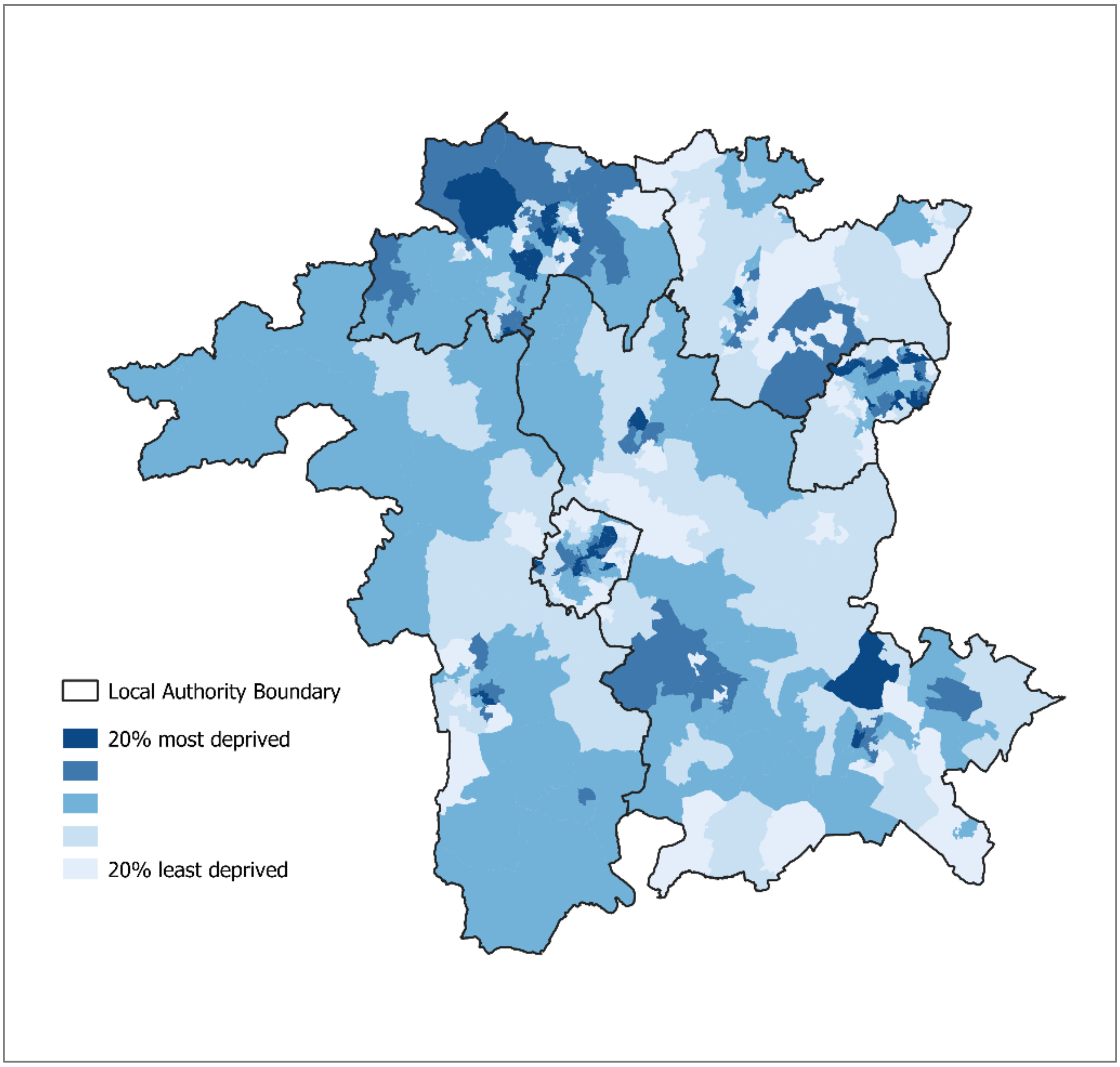


Figure 23: Deprivation in the WLEP (Source: IMD 2019)

6. Environment

In 2017, Worcestershire LEP produced 5.7 tonnes of CO_2 emissions per capita, above the England average of 5.1 (see Table 13). Compared to 2016, Worcestershire has reduced emissions per capita by 3.8%. England's overall emissions per capita decreased by 5.6%.

	2016 per capita emissions	2017 per capita emissions	2016-17 per capita emissions change (%)
England	5.4	5.1	-5.6%
Worcestershire	**5.9**	**5.7**	**-3.8%**

Table 13: 2016-17 CO_2 Emissions (Source: Department for Business, Energy & Industrial Strategy)

According to Worcestershire LEP's SEP and LIS Development Evidence Base, Worcestershire has strengths, opportunities and challenges:

Strengths

- Worcestershire Energy Strategy (2030) driving the shift to low carbon economy and clean growth: reduce carbon emissions by 50%; double the local carbon sector; triple energy production
- 400 + low carbon/environmental companies, employing close to 7,500 people in 2011/12 (Turnover £1bn).
- Low carbon and renewable energy only generates £334m, employing 1,700.
- Offenham Geo-thermal Resource
- Key employers – e.g. Bosch Thermotechnology
- University of Worcester- recognition for commitment to sustainability
- Agri-tech West, Pershore College

Opportunities

- Industries to be transformed include construction, manufacturing (e.g. automotive) – both predominant in the area
- Geothermal heat below Worcestershire – potentially significant energy source
- Housing/commitment to high quality energy efficient homes – key priority for the area
- Agri-tech R&D, potential collaboration Pershore, Harper Adams, Hartpury University (The Marches; Gfirst)

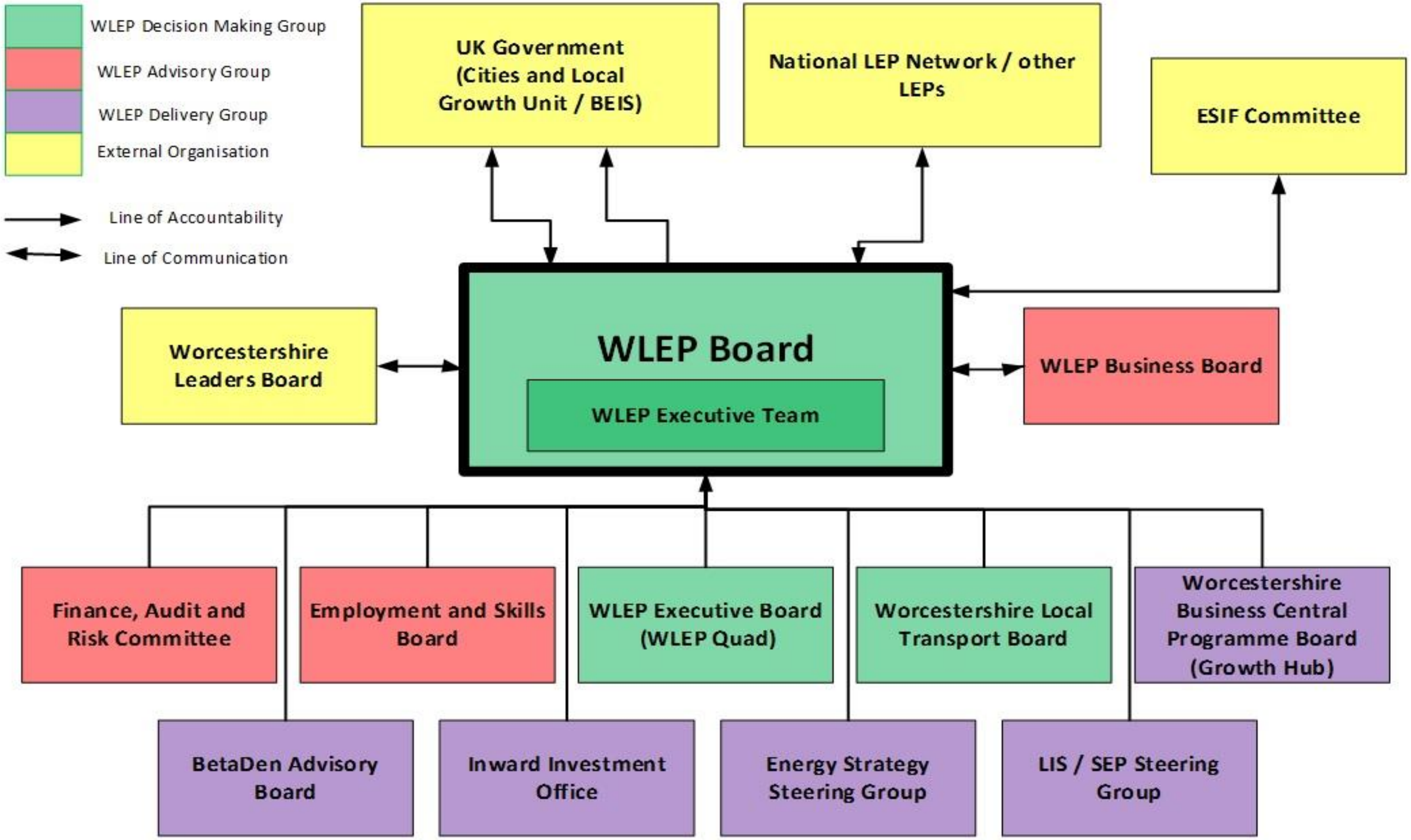
Key issues/considerations

- Some areas of potential competitive advantage linked to Energy Strategy – threat to traditional energy related activities
- Significant investment required to progress Geothermal Heat proposition
- Establishment of industrial clusters likely to focus on Grangemouth, Merseyside, South Wales, Southampton, Teesside, Humberside

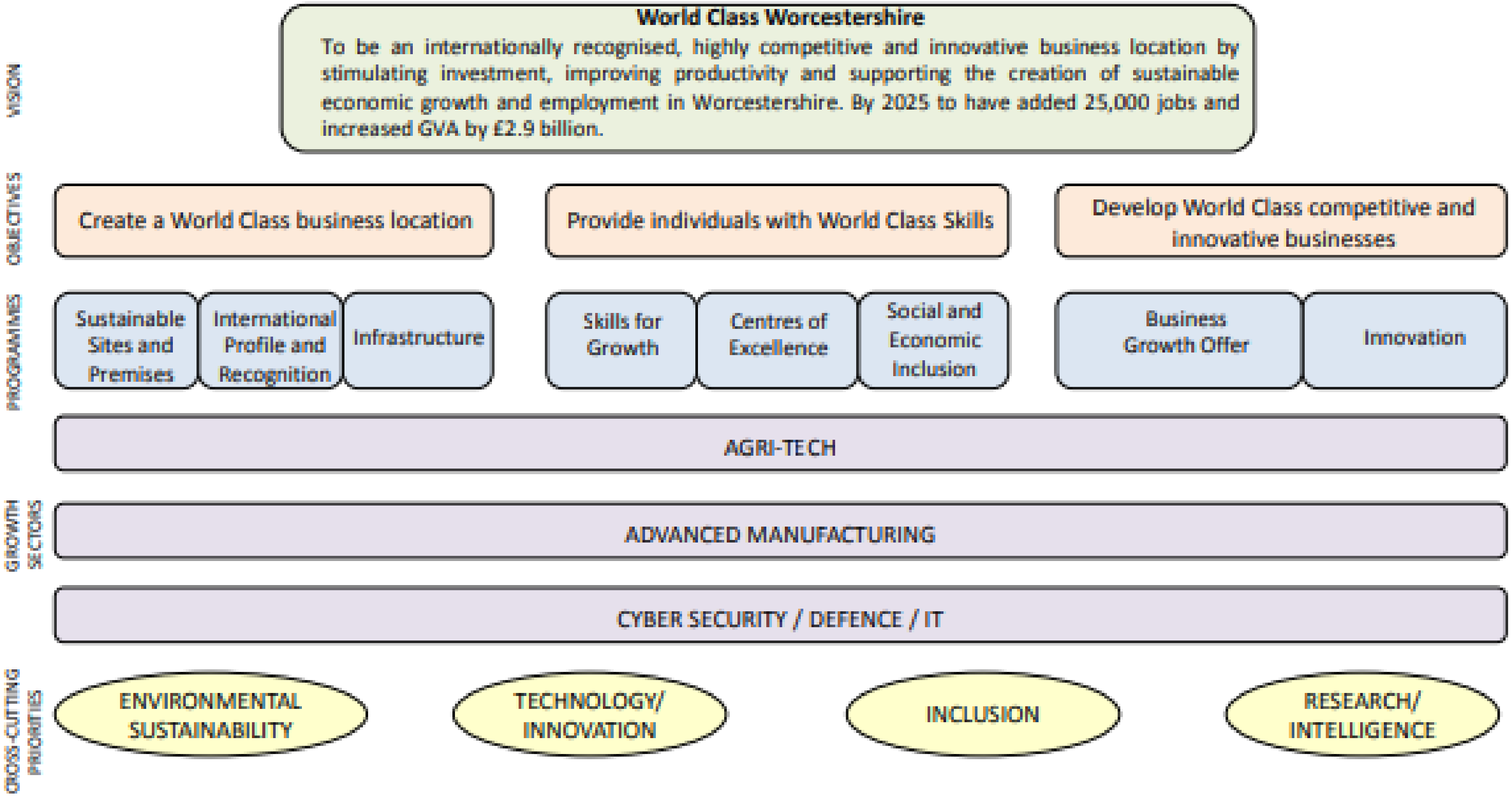
Source: Worcestershire LEP's SEP & LIS Development Evidence Base

A new 'Energy Strategy' for Worcestershire was launched in 2019.

Appendix A – Governance Structure of the WLEP



Appendix B – WLEP SEP Vision, Objectives and Priorities



Appendix C – WLEP SEP Implementation Plan