South West

Reviving Regions:
Empowering places to revive and thrive

- South West growth priorities
- Regional scorecard identifying strengths
- 12 sub-regional scorecards

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Introduction

The UK has a productivity challenge. Productivity growth has stagnated since the financial crisis, with the knock-on impact of low wage growth and growing inequalities, which the CBI explored in **Reviving regions**, and have now expanded upon by publishing regional-specific scorecards and growth priorities.

Disparities between economic performance are large both across and within English regions. London remains the most productive part of the country in absolute terms, and many marginalised places are in the North of England. But the picture is not as clear cut as north vs. south, with most regions having areas that are doing well, and some that are underperforming.

The CBI has set out a series of recommendations to close productivity gaps and level up the country. The recommendations are underpinned by the idea that interventions must reflect local needs, and regions should be further empowered if we are to level up the country. This becomes increasingly important given the impacts of the pandemic could affect regions differently.

Click here to download the report

The report recommendations included:

- **Building vibrant local labour markets:** including increasing local capacity to deliver back to work programmes alongside a long-term focus on the devolution of adult skills to meet our growing skills gap.
- **Transforming local physical and digital infrastructure to facilitate new ways of working:** including a focus on the future of towns and cities, and a reform of regional funding to ensure a strategic approach to future investments.
- **Inspiring world-class, innovative businesses to invest in the regions:** including short term interventions to help businesses grow, locally designed and delivered business support with a focus on access to exporting opportunities, and interventions to close the gap in regional R&D funding.

The CBI has now developed a series of scorecards to support policymakers and business to understand the unique strengths of regions, and areas of focus for interventions. These provide a snapshot of the economic and social health of the nine regions of England, alongside a more detailed picture for sub-regions.

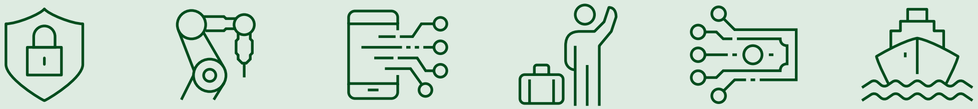
Based on this data, the recommendations set out above, as well as insights from local businesses the CBI has also developed growth priorities for each region, setting out what we hope to achieve working collaboratively with local and national stakeholders.

South West growth priorities

Context

The South West is ranked fifth out of nine English regions for productivity (GVA £ per hour), however, this varies significantly around the region. This can be explained in part, by sectoral differences in the region. The far South West peninsula is more dependent on rural activities and tourism, whilst the northern and eastern counties have a more mixed economy that benefit from cities like Bristol. High quality of life and improved connectivity make the region an attractive location for investment and business relocation. By utilising the region's natural resources and building grid capacity, opportunities exist for the region to help the UK achieve net-zero by 2050.

Competitive strengths



Cyber and defence | High value manufacturing and aerospace | Creative and digital | Tourism and hospitality | Fintech | Maritime industries

Regional assets

- Met Office and Hydrographic Office
- Bristol's Bottle Yard Creative Hub
- High Performing, HE and FE Sector
- GCHQ
- National Composites Centre

The CBI has developed the following growth priorities

- **Identify and close skills gaps within the local workforce** by working with businesses, Local Authorities, Local Enterprise Partnerships and West of England Combined Authority to develop the high-level skills required to meet future demand in growth sectors such as advanced engineering, digital and green technologies. This involves working with training and education providers to enhance educational attainment, upskilling and reskilling opportunities.
- **Improve digital infrastructure to facilitate new ways of working** by meeting the target to deliver full fibre to 92% of homes and business in the South West by 2025. This improved digital connectivity, and more flexible work patterns could ease pressure on the existing physical transport infrastructure and accelerate decarbonisation.
- **Inspire world-class innovative businesses to invest in the South West** by improving access to targeted business support and finance. Focus should be on low-carbon solutions and R&D, utilising our universities to support research and commercialisation, allowing businesses to respond to growth opportunities.

Next steps

The CBI, working alongside local and national leaders, is focused on the implementation of these priorities. To become involved, please contact **Nicky Williams**.

About the scorecards

The scorecards below provide a snapshot of the economic health of regions. Each scorecard includes 20 indicators, focussed on a region's productivity and some of the factors that can influence it. The scorecards are designed to help businesses, central and local government identify priority areas for intervention to improve local economic outcomes.

Regions and sub-regions

Because there are differences within regions, as well as between them, we have developed two different types of scorecards – one for each of the nine large English regions (known as ITL1 regions), and one for each of 133 sub-regions (known as ITL3 regions).

This pack contains a scorecard for the South West ITL1 region, followed by scorecards showing values for each of the 12 ITL3 sub-regions within it.

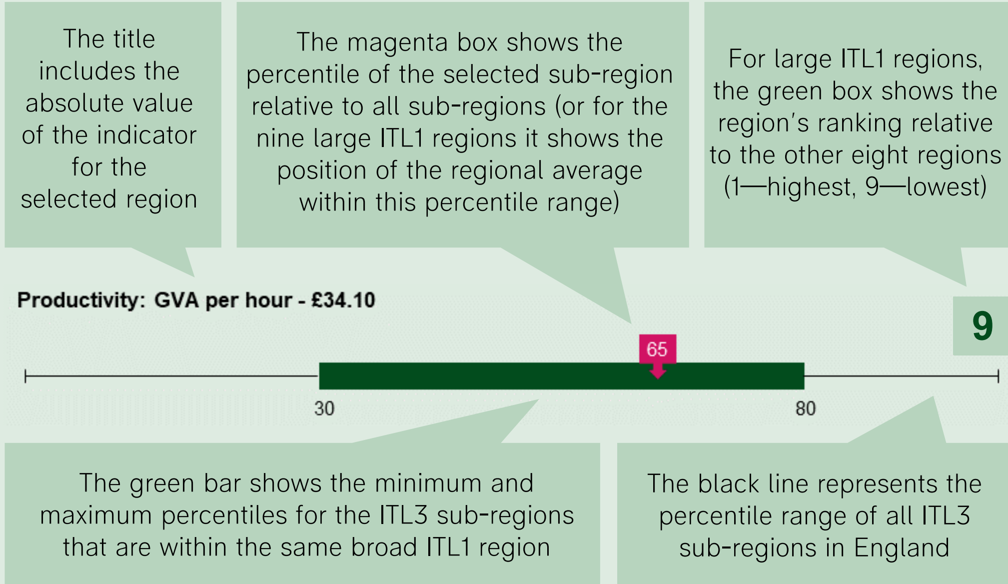
How to read the charts

All data in the charts are expressed as percentiles, which show how the value of an indicator for the selected area compares with the values of all English sub-regions. Taking productivity as an example, if a sub-region's productivity is at the 65th percentile, this means it is more productive than 65% of sub-regions.

The charts in the first scorecard show the range of outcomes within the South West ITL1 region (the dark green bar), plotting the position of the average for the region within this range (the magenta box).

Rankings are also provided showing how the averages for the South West ITL1 region compare with the averages of other large English regions.

The ITL1 scorecard is followed by scorecards showing values for each ITL3 sub-region within it, with the figure in the magenta box representing the percentile for the selected sub-region.



Is productivity converging or diverging?

To capture how productivity has changed over the decade to 2018 (latest available data), the scorecards assign each region to one of four groups:

- Above average productivity and above average productivity growth. Regions have pulled further ahead, increasing their advantage.
- Above average productivity but below average productivity growth. Regions are still doing well but have lost ground relative to the average.
- Below average productivity but above average productivity growth. Regions have narrowed the gap to the average, but some still lag behind.
- Below average productivity and below average productivity growth. Regions are falling further behind the average.

South West

Economic & social outcomes[1, 2]

Household income: £20,907 p/c — 4

57

28 73

Employment rate: 78.2% — 2

69

20 92

Deprivation index: 18.2 — 7

35

11 83

Life satisfaction index: 7.8 — 1

74

2 100

Scorecard key

- x — Rank out of 9 regions, 1=highest value
- Percentile of average for ITL1 region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £31.76 — 5

44

5 97

- Above average and gaining ground
- Above average but losing ground
- **Below average but gaining ground**
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 89.0% — 5

51

8 88

Graduates in workforce: 39.2% — 3

59

22 87

In-work training: 18.1% — 8

25

0 94

Working-age population & projected change by 2030

3,379,772

4.1%

Well-connected, accessible places

Broadband speed: 51.4 mb/s — 8

34

0 97

Commute time: 26.0 mins — 8

39

6 66

Home working index: 3.2 — 4

50

7 81

Median house prices: £260,000 — 4

58

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £445 — 6

56

3 80

Innovation activity (ITL1): 40.5% — 1

92

High growth firms: 4.2% — 6

54

1 77

Exports intensity: 21.7% of GVA — 8

55

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data is for ITL2 level regions. For innovation activity all data is for ITL1 regions only.

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Bristol, City of

South West

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £19,692 p/c

43

28 73

Employment rate: 75.8%

45

20 92

Deprivation index: 26.4

72

11 83

Life satisfaction index: 7.5

13

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £31.69

43

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 90.0%

57

8 88

Graduates in workforce: 51.0%

87

22 87

In-work training: 24.1%

88

0 94

Working-age population & projected change by 2030

317,249

8.9%

Well-connected, accessible places

Broadband speed: 79.7 mb/s

97

0 97

Commute time: 30.9 mins

66

6 66

Home working index: 3.5

81

7 81

Median house prices: £280,000

63

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £721

80

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.8%

77

1 77

Exports intensity: 17.6% of GVA

38

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Bath and North East Somerset, North Somerset and South Gloucestershire

South West

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £22,625 p/c

71
28 73

Employment rate: 80.9%

92
20 92

Deprivation index: 13.0

11
11 83

Life satisfaction index: 7.7

48
2 100

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Productivity (GVA per hour): £36.84

78
5 97

Vibrant local labour markets

Schools above standard: 86.5%

40
8 88

Graduates in workforce: 41.1%

65
22 87

In-work training: 19.9%

50
0 94

Working-age population & projected change by 2030

426,456

8.3%

Well-connected, accessible places

Broadband speed: 54.9 mb/s

45
0 97

Commute time: 29.3 mins

58
6 66

Home working index: 3.4

70
7 81

Median house prices: £287,500

67
29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £721

80
3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.1%

51
1 77

Exports intensity: 29.2% of GVA

74
7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Gloucestershire CC

South West

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £22,553 p/c

70
28 73

Employment rate: 80.4%

86
20 92

Deprivation index: 14.9

17
11 83

Life satisfaction index: 7.8

92
2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £30.64

39
5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 92.1%

65
8 88

Graduates in workforce: 43.3%

71
22 87

In-work training: 19.5%

45
0 94

Working-age population & projected change by 2030

384,540

4.2%

Well-connected, accessible places

Broadband speed: 52.6 mb/s

37
0 97

Commute time: 26.5 mins

41
6 66

Home working index: 3.2

52
7 81

Median house prices: £261,995

59
29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £721

80
3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.7%

76
1 77

Exports intensity: 43.4% of GVA

92
7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Swindon

South West

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £19,804 p/c

46

28 73

Employment rate: 80.5%

89

20 92

Deprivation index: 18.6

38

11 83

Life satisfaction index: 7.7

71

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £49.41

97

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 100.0%

88

8 88

Graduates in workforce: 34.4%

40

22 87

In-work training: 23.7%

81

0 94

Working-age population & projected change by 2030

140,495

4.1%

Well-connected, accessible places

Broadband speed: 69.7 mb/s

80

0 97

Commute time: 21.6 mins

7

6 66

Home working index: 3.2

48

7 81

Median house prices: £227,500

47

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £721

80

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.1%

41

1 77

Exports intensity: 24.5% of GVA

65

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Wiltshire
South West

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £22,522 p/c
Percentile: 70 (range 28–73)

Employment rate: 77.5%
Percentile: 62 (range 20–92)

Deprivation index: 13.4
Percentile: 13 (range 11–83)

Life satisfaction index: 7.7
Percentile: 50 (range 2–100)

Scorecard key
- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

- Above average and gaining ground
- Above average but losing ground
- **Below average but gaining ground**
- Below average and losing ground

Productivity (GVA per hour): £33.04
Percentile: 53 (range 5–97)

Vibrant local labour markets

Schools above standard: 92.9%
Percentile: 70 (range 8–88)

Graduates in workforce: 38.6%
Percentile: 57 (range 22–87)

In-work training: 15.8%
Percentile: 5 (range 0–94)

Working-age population & projected change by 2030
296,878
2.3%

Well-connected, accessible places

Broadband speed: 44.9 mb/s
Percentile: 23 (range 0–97)

Commute time: 26.5 mins
Percentile: 42 (range 6–66)

Home working index: 3.2
Percentile: 44 (range 7–81)

Median house prices: £275,000
Percentile: 61 (range 29–71)

World-class, innovative businesses[3]

R&D per head (ILT2): £721
Percentile: 80 (range 3–80)

Innovation activity (ITL1): 40.5%
Percentile: 92

High growth firms: 4.0%
Percentile: 40 (range 1–77)

Exports intensity: 12.4% of GVA
Percentile: 14 (range 7–92)

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Bournemouth, Christchurch and Poole[1]

South West

Classification: Predominantly Urban

Economic & social outcomes[2, 3]

Household income: £21,593 p/c
62
28 73

Employment rate: 78.9%
77
20 92

Deprivation index: 18.2
35
11 83

Life satisfaction index: 7.7
70
2 100

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[2, 3]

Productivity (GVA per hour): £31.80
45
5 97

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Vibrant local labour markets

Schools above standard: 80.0%
15
8 88

Graduates in workforce: 39.4%
59
22 87

In-work training: 21.2%
64
0 94

Working-age population & projected change by 2030
240,905
0.4%

Well-connected, accessible places

Broadband speed: 59.6 mb/s
61
0 97

Commute time: 27.2 mins
46
6 66

Home working index: 3.3
59
7 81

Median house prices: £278,950
62
29 71

World-class, innovative businesses[4]

R&D per head (ILT2): £212
10
3 80

Innovation activity (ITL1): 40.5%
92

High growth firms: 4.1%
43
1 77

Exports intensity: 23.0% of GVA
60
7 92

1) Indicators for this ITL3 area were derived from LAD data where possible, but some indicators reflect previous NUTS3 boundaries. For details see Notes & Sources.
2) Indicators are plotted on a percentile scale of all ITL3 areas in England.
3) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
4) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Dorset [1]

South West

Classification:
Predominantly Rural

Economic & social outcomes[2, 3]

Household income: £22,680 p/c

73

28 73

Employment rate: 76.0%

47

20 92

Deprivation index: 15.7

20

11 83

Life satisfaction index: 7.8

89

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[2, 3]

Productivity (GVA per hour): £30.25

33

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 95.2%

77

8 88

Graduates in workforce: 36.4%

47

22 87

In-work training: 12.7%

0

0 94

Working-age population & projected change by 2030

208,734

-2.8%

Well-connected, accessible places

Broadband speed: 39.1 mb/s

0

0 97

Commute time: 22.3 mins

11

6 66

Home working index: 3.3

55

7 81

Median house prices: £305,000

71

29 71

World-class, innovative businesses[4]

R&D per head (ILT2): £212

10

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 3.8%

27

1 77

Exports intensity: 15.6% of GVA

26

7 92

1) Indicators for this ITL3 area were derived from LAD data where possible, but some indicators reflect previous NUTS3 boundaries. For details see Notes & Sources.
2) Indicators are plotted on a percentile scale of all ITL3 areas in England.
3) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
4) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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C B I

Somerset CC

South West

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £20,441 p/c

53

28 73

Employment rate: 77.8%

65

20 92

Deprivation index: 18.6

36

11 83

Life satisfaction index: 7.2

2

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £27.67

14

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 89.3%

54

8 88

Graduates in workforce: 35.2%

42

22 87

In-work training: 17.7%

22

0 94

Working-age population & projected change by 2030

323,324

1.5%

Well-connected, accessible places

Broadband speed: 39.4 mb/s

2

0 97

Commute time: 27.1 mins

45

6 66

Home working index: 3.0

7

7 81

Median house prices: £235,000

48

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £212

10

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.2%

55

1 77

Exports intensity: 17.6% of GVA

37

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Cornwall and Isles of Scilly

South West

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £18,568 p/c

34

28 73

Employment rate: 76.3%

52

20 92

Deprivation index: 23.0

56

11 83

Life satisfaction index: 7.7

55

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £26.53

6

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 90.0%

57

8 88

Graduates in workforce: 37.0%

49

22 87

In-work training: 17.4%

16

0 94

Working-age population & projected change by 2030

331,485

6.1%

Well-connected, accessible places

Broadband speed: 39.1 mb/s

1

0 97

Commute time: 24.2 mins

22

6 66

Home working index: 3.1

10

7 81

Median house prices: £236,000

50

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £77

3

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.0%

39

1 77

Exports intensity: 12.6% of GVA

14

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Plymouth

South West

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £17,555 p/c

28

28 73

Employment rate: 75.1%

39

20 92

Deprivation index: 26.6

73

11 83

Life satisfaction index: 7.7

57

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £30.39

36

5 97

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 75.0%

8

8 88

Graduates in workforce: 31.0%

22

22 87

In-work training: 25.9%

94

0 94

Working-age population & projected change by 2030

165,861

0.6%

Well-connected, accessible places

Broadband speed: 75.6 mb/s

90

0 97

Commute time: 22.4 mins

11

6 66

Home working index: 3.1

24

7 81

Median house prices: £182,500

29

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £303

27

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.4%

64

1 77

Exports intensity: 17.3% of GVA

36

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Torbay

South West

Classification: Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £18,412 p/c

33

28 73

Employment rate: 72.6%

20

20 92

Deprivation index: 28.1

83

11 83

Life satisfaction index: 7.7

48

2 100

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £26.52

5

5 97

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Vibrant local labour markets

Schools above standard: 75.0%

8

8 88

Graduates in workforce: 31.9%

28

22 87

In-work training: 21.0%

62

0 94

Working-age population & projected change by 2030

76,787

2.1%

Well-connected, accessible places

Broadband speed: 39.9 mb/s

8

0 97

Commute time: 21.0 mins

6

6 66

Home working index: 3.1

18

7 81

Median house prices: £203,250

38

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £303

27

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 2.2%

1

1 77

Exports intensity: 11.0% of GVA

7

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

CBI

Devon CC

South West

Classification:
Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £20,461 p/c

54

28 73

Employment rate: 79.5%

81

20 92

Deprivation index: 16.6

25

11 83

Life satisfaction index: 7.9

100

2 100

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Productivity (GVA per hour): £29.75

27

5 97

Vibrant local labour markets

Schools above standard: 86.5%

40

8 88

Graduates in workforce: 37.6%

52

22 87

In-work training: 17.2%

15

0 94

Working-age population & projected change by 2030

467,058

5.0%

Well-connected, accessible places

Broadband speed: 43.2 mb/s

18

0 97

Commute time: 24.3 mins

23

6 66

Home working index: 3.2

48

7 81

Median house prices: £260,000

58

29 71

World-class, innovative businesses[3]

R&D per head (ILT2): £303

27

3 80

Innovation activity (ITL1): 40.5%

92

High growth firms: 4.1%

45

1 77

Exports intensity: 12.4% of GVA

13

7 92

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Notes and sources

Regions & classifications

Units of analysis
The geographic areas for much of our analysis are defined by the International Territorial Levels (ITLs), which were introduced in 2021 as a successor to the EU's Nomenclature of Units for Territorial Statistics (NUTS) classifications. There are two different types of scorecards:

- ITL1 regions: Nine major English regions, with an average population of 6.3m, ranging from a minimum of 2.7m (North East) to 9.2m (South East).
- ITL3 regions: 133 smaller regions with an average population of 423k, ranging from a minimum of 106k (Darlington) to a maximum of 1.2m (Hertfordshire).

In all but two cases the ITL3 and the old NUTS3 boundaries are aligned. The exceptions are "Bournemouth and Poole" and "Dorset CC", which under ITLs are classified as "Bournemouth, Christchurch and Poole", and "Dorset". Where possible we have created ITL data for these two sub-regions using Local Authority District (LAD) data.

Rural-urban classification
Region is defined as: Predominantly Rural if the rural population share is greater than or equal to 50%; Urban With Significant Rural if the rural population share is 26%-49%; Predominantly Urban if the rural population share is less than or equal to 25%. ONS 2011 Census data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Economic & social outcomes

Household income – £ per person
Gross disposable household income per capita. Current basic prices. ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Employment rate – %
Employment rate for 16-64 year-old residents. ONS data for October 2019 to September 2020. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Deprivation index
Index of Multiple Deprivation Average Score, where the larger the score, the more deprived the area. Ministry of Housing, Communities & Local Government data for 2019. Scores derived from LAD values, weighted by population. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Life satisfaction index
Average rating, ranging from 0 to 10, where 10 implies complete satisfaction. ONS data for 2019/20. Data derived from LAD values, weighted by population. Percentiles based on NUTS regions, mapped from LAD data.

Productivity

Productivity – GVA per hour worked, £
Gross value added per hour worked in £, nominal (smoothed). ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Productivity – convergence/divergence taxonomy
The level of productivity is defined by gross value added per hour in £, nominal (smoothed). ONS 2018 data. Productivity growth is annual average % change in real value added per hour over 2009-18. NUTS regions. The methodology is based on an approach used in "UK Regional Productivity Differences: An Evidence Review", Industry Strategy Council.

Notes and sources

Vibrant Local Labour Markets

Schools above standard – %
Percentage of schools categorised as above floor standard. Department for Education 2017/18 data. Values derived from Local Education Authority (LEA) data. Where the LEA encompasses more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Graduates in workforce – %
Percentage of 16-64 year-old population with NVQ4+. ONS data for 2019. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

In-work training – %
Percentage of firms offering management training. Data from Department for Education, Employers Skills Survey 2019. Values derived from LEA data. Where the LEA corresponds to more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Working-age population
Number of people aged 16-64. ONS data for 2019. Projected % change, 2019-2030. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Well-Connected Places

Broadband Speed – mb/s
Median download speed in megabits per second. Ofcom data for 2020. Values are derived from LAD data, weighted by population. Percentiles are based on ITL regions, mapped from LAD data.

Commute times – minutes
Usual home to work travel time in minutes. Figures provided by ONS. 2019 data. Percentiles based on NUTS regions.

Home working index
CBI index of ability to home work, with scores ranging from 0 to 5, where 5 implies the ability for all tasks to be carried out remotely. Calculated from ONS "Which jobs can be done from home?" (derived from US Labor Department) and ONS Annual Population Survey on occupational employment by NUTS3, 2018 data. Percentiles based on NUTS regions.

Median house prices – £
Median price paid (all house types). ONS data for year ending September 2020. Percentiles based on NUTS regions.

World-class, innovative businesses

R&D per head – £
Gross domestic R&D expenditure (GERD), £ per inhabitant. Eurostat data for 2018. Data are only available at NUTS1 and NUTS2 levels, therefore each NUTS3 sub-region takes the value of the larger NUTS2 region of which it is a part. Percentiles are based on NUTS2 regions.

Innovation activity – %
Percentage of businesses that are classified as innovation active. Data from BEIS, UK Innovation Survey for 2016-18. Data are only available at NUTS1 level, therefore each NUTS3 sub-region takes the value of the larger NUTS1 region of which it is a part. Percentiles also based on NUTS1 regions.

High Growth Firms – %
Percentage of businesses that are classified as "high growth". ONS data for 2019. Percentiles are based on ITL regions, mapped from LAD data.

Exporting intensity – % of GVA
Exports of goods and services as a % of gross value added. Data derived from HMRC and ONS. Percentiles based on NUTS regions.