TOPIC PAPER:
THE DEVELOPMENT OF RUGBY BOROUGH 2011-2024

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2. INTRODUCTION

2.1. This topic paper provides a brief overview of how Rugby Borough has changed between the years 2011 and 2024, with a broad focus on demographics, housing, the local economy and the built environment. The conclusions are drawn from analyses of data sourced from the Office for National Statistics (ONS) and the Council's own monitoring reports. For certain local matters the census is the only readily available reliable source of data, and therefore in these instances, the paper only reports up to 2021. However, wherever possible, additional data has been sourced in order to be able to report up to 2024.

3. SUMMARY

3.1. Between 2011 and 2021, Rugby Borough experienced one of the highest rates of population growth (14.3%) in the country – a trend which is estimated to have continued in the years which have followed.

3.2. The age of the Borough's residents has not changed considerably, with the median age remaining at 40 years, but there has been a noticeable diversification of the population in terms of country of birth, ethnicity and religion.

3.3. There has been a significant uplift in the educational status of the Borough's residents, with fewer residents being unqualified, and more holding higher level qualifications.

3.4. A clear shift has occurred in the characteristics of housing tenure in the Borough, with ownership and social renting diminishing in favour of private renting. This change has also been accompanied by a marginal increase in overcrowding (per bedroom occupancy rates).

3.5. The local economy has changed substantially in a number of respects. The level of unemployment has reduced by around a quarter, and a move has occurred away from part-time work towards full-time work.

3.6. An additional 1,275 micro businesses were in operation in 2023 as compared with 2011, and in 2023, the first business units employing 1,000 or more people were counted in the Borough by the ONS.

3.7. Far more residents are now employed in the industry groups of wholesale and retail trade, human health and social work, and transport and storage, whereas manufacturing and accommodation and food service activities have declined. In terms of occupational classification, growth has been concentrated at the high and low ends of the scale: routine occupations on one hand, and higher managerial, administrative and professional occupations on the other.

3.8. The net addition of 7,795 dwellings and completion of over 700,000 sqm of employment land since 2011 has caused the urban spread of Rugby town to expand significantly.

4. DEMOGRAPHICS

POPULATION

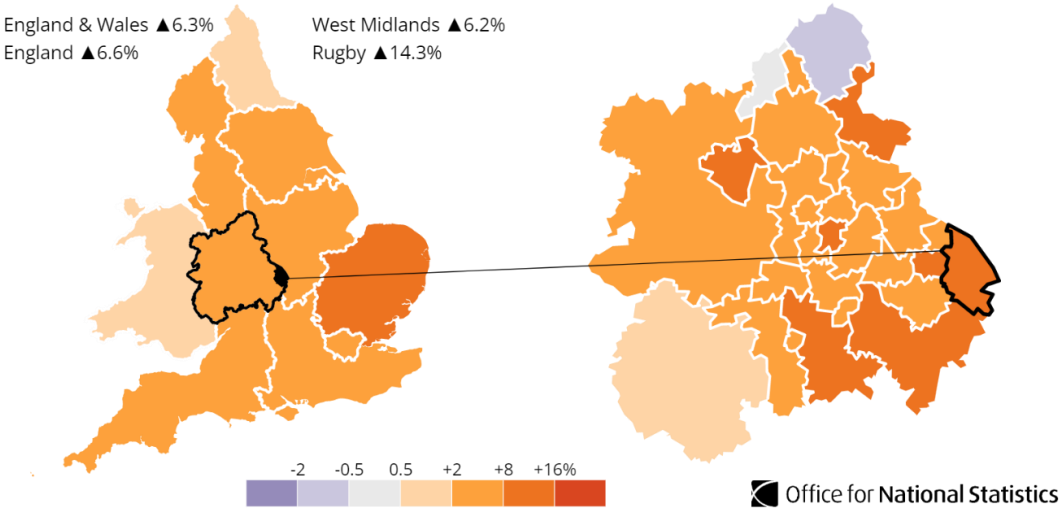
4.1. The population of the Borough of Rugby, as measured by the census, increased from 100,075 in 2011 to 114,363 in 2021 (14.3% growth). This means that as a local authority area, Rugby experienced the highest rate of population growth in Warwickshire, the West Midlands, and furthermore, was ranked 17 out of 367 local authorities in England and Wales in terms of population growth rate.

4.2. The following tables and diagram compare the population growth of Rugby with that of its neighboring authorities, Warwickshire, the West Midlands, England and the United Kingdom.

Local Authority	Population 2011	Population 2021	% Growth
Harborough	85,382	97,625	14.3%
Rugby	100,075	114,363	14.3%
West Northamptonshire	375,101	425,725	13.5%
Stratford-on-Avon	120,485	134,725	11.8%
Blaby	93,915	102,926	9.6%
Coventry	316,960	345,324	8.9%
Hinckley and Bosworth	105,078	113,640	8.1%
Warwick	137,648	148,452	7.8%
Nuneaton and Bedworth	125,252	134,197	7.1%
North Warwickshire	62,014	65,035	4.9%

Area	Population 2011	Population 2021	% Growth
Rugby	100,075	114,363	14.3%
Warwickshire	545,474	596,773	9.4%
West Midlands	5,608,700	5,956,200	6.2%
England	53,107,200	56,554,900	6.5%
United Kingdom	63,285,100	66,983,500	5.8%

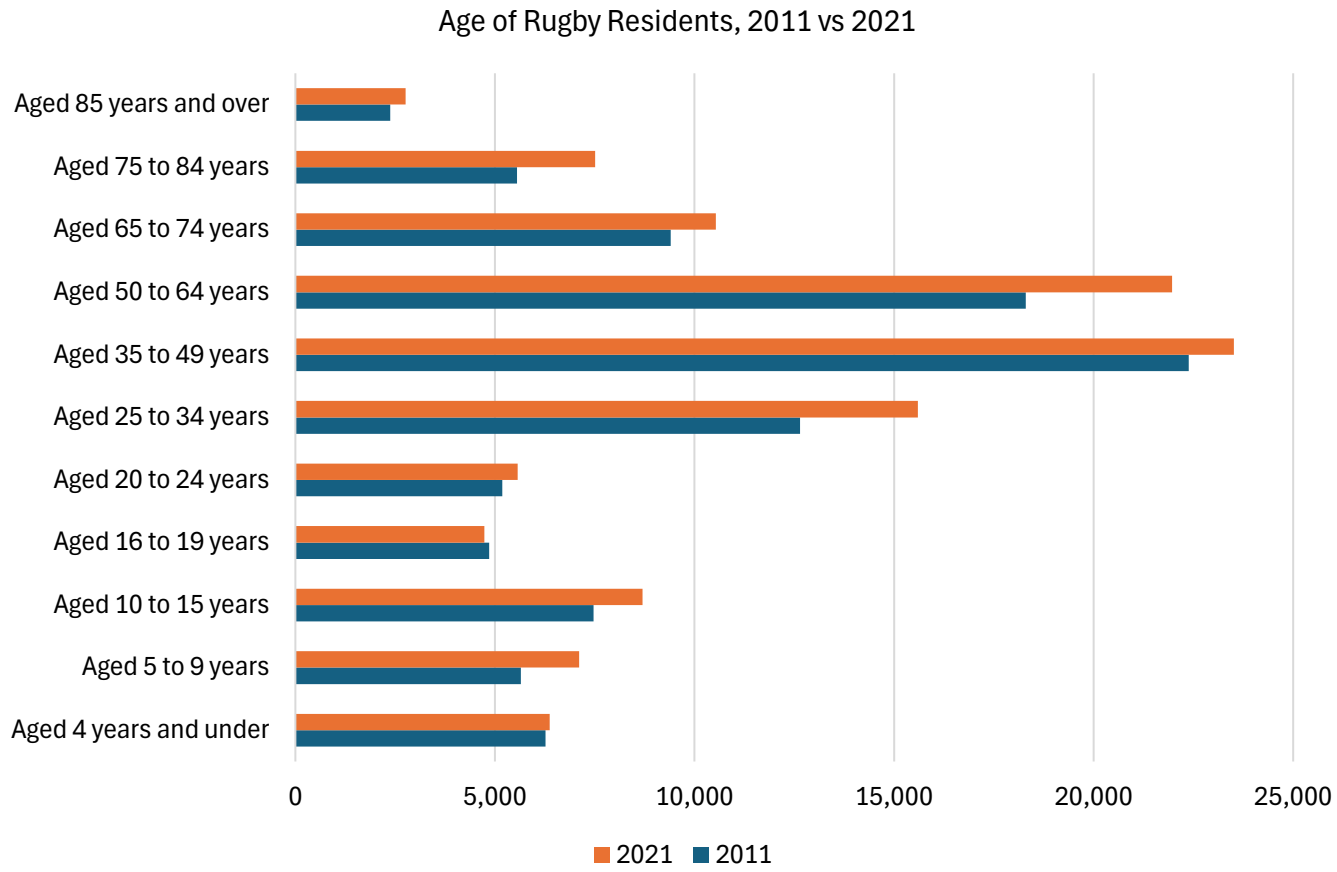
Population change in Rugby: Census 2011 to Census 2021



4.3. This growth in population means that the Borough's population density has increased from 285 residents per square kilometre to 326. However, in comparative perspective this is not particularly significant and there remains huge variances between local authorities. For example, the Borough's population density is now more than double that of Stratford-on-Avon, but roughly five times less than Nuneaton and Bedworth.

AGE

4.4. The Borough's median age of 40 years was unchanged between 2011 and 2021. Over that same time period, the proportion of the population which was of working age (16-64) decreased marginally from 63.3% to 62.5%, a fall which was less than that seen in the West Midlands (-1.6%) and Great Britain (-1.8%) over the same period. This drop occurred due to a fairly large relative fall in the number of residents in the age bracket of 35 to 49 years, and smaller relative falls in the brackets of 20 to 24 years and 16 to 19 years, the latter of which also fell in absolute terms.



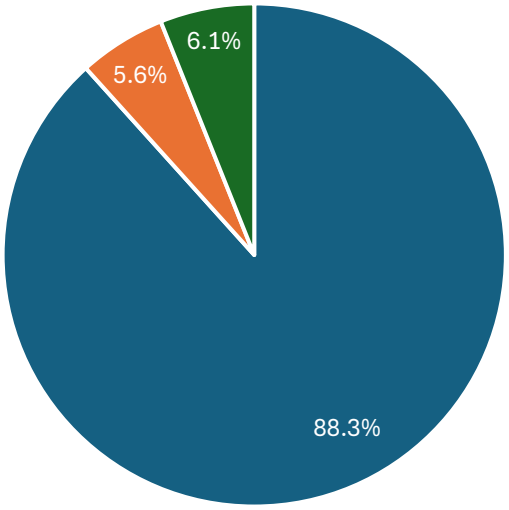
4.5. Amongst people below the working age, there was relative growth in the population of those aged 5 to 15 years, but a relative fall in the population which was aged 4 and below.

4.6. Amongst people above the working age, there was a shift towards the 75 to 84 years bracket, with the 65 to 74 years bracket declining marginally in relative terms, and the 85 years and older bracket remaining flat.

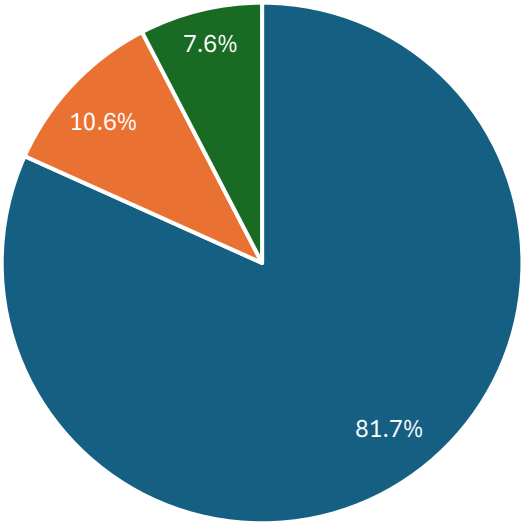
COUNTRY OF BIRTH

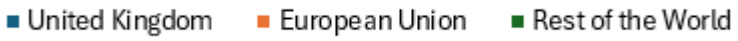
4.7. The proportion of the Borough's residents which were born outside of the UK grew significantly between the two censuses, increasing from 11.7% of the total in 2011, to 18.2% of the total in 2021. The growth in residents from the European Union was particularly high, more than doubling in count as well as nearly doubling as a proportion of total residents.

Country of Birth in Rugby, 2011



Country of Birth in Rugby, 2021





4.8. Broadly speaking, the fall in proportion of residents born in the UK and the increase in the proportion of residents born in the rest of the world (excluding the EU) mirrored the trends seen in the West Midlands and England, but the growth in the proportion of residents born in the EU was considerably more pronounced in Rugby.

Residents Born in the European Union

Area	2011	Percentage	2021	Percentage
Rugby	5,618	5.6	12,171	10.6
West Midlands	178,311	3.2	300,823	5.1
England	2,375,441	4.4	3,551,766	6.3

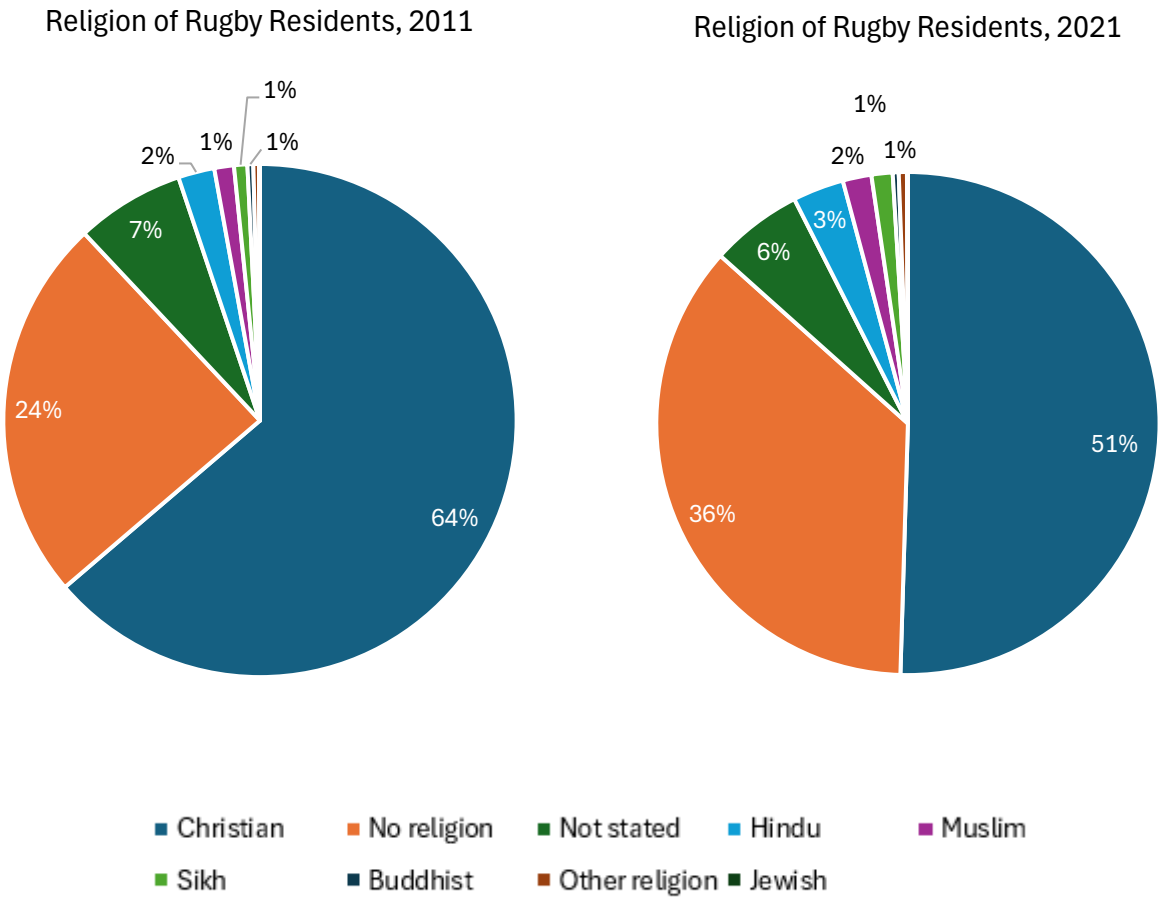
ETHNICITY AND RELIGION

4.9. The Borough also became more diversified in terms of ethnicity and religion between the two censuses.

4.10. The proportion of residents identifying as non-White grew from 9.5% to 14.3%. This shift was largely driven by an increase in the Asian/Asian British population which increased by over 3,500 residents, and grew as a proportion of total residents from 5.2% to 7.6%. Though much

smaller in size, the 'other ethnic group' category saw by far the highest growth rate, having a count that was four times larger in 2021 than in 2011.

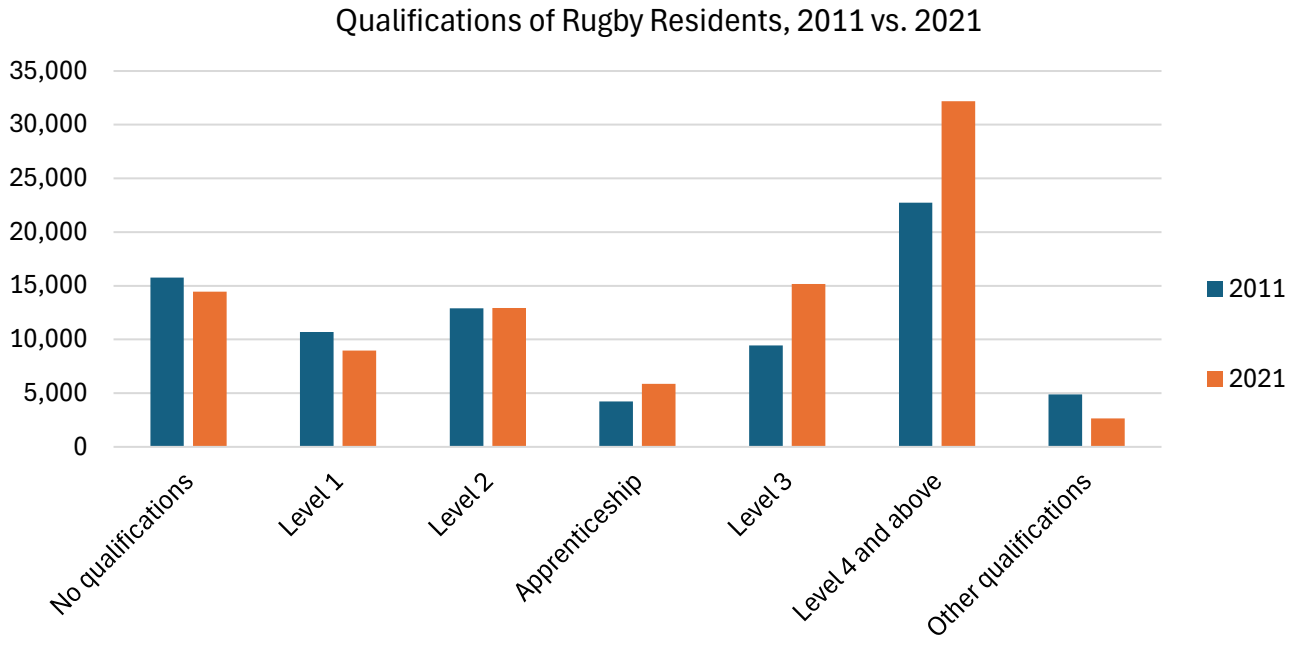
4.11. More pronounced shifts were seen in terms of religion. The proportion of the Borough's residents identifying as Christian fell from 63.7% to 50.5%, while those identifying with all other religions grew. However, arguably the most notable change was the increase in those identifying as having no religion – this group increased by over 17,000 residents and comprised over 36% of the total in 2021.



EDUCATION

4.12. Between the two censuses there was a notable upwards shift in the levels of qualification held by residents of the Borough. The number of residents with no qualifications or only level 1 qualifications has fallen in both absolute and relative terms, while the number with level 2 qualifications has remained almost flat. By contrast, the number of residents with an apprenticeship, or qualifications of level 3, 4 or above have all increased.

4.13. In comparison with the West Midlands and England, the lift in qualification levels in the Borough has been more muted over the period, although it should be noted that Rugby nevertheless started from and remained in a more favourable position (I.E. with fewer residents with no qualifications and more residents with higher levels of qualifications).



HEALTH AND DISABILITY

4.14. The self-reported general health of the Borough's residents marginally improved between 2011 and 2021, with the proportion of residents reporting their health as very good increasing and all other categories decreasing. This was broadly in line with the trends seen in the West Midlands and England.

General Health of Rugby Residents

	2011		2021	
General health condition	**Count**	**%**	**Count**	**%**
Very good health	47,711	47.7	55,844	48.8
Good health	35,306	35.3	39,851	34.8
Fair health	12,580	12.6	13,777	12.0
Bad health	3,508	3.5	3,887	3.4
Very bad health	970	1.0	1,004	0.9

4.15. The total proportion of residents with disabilities in the Borough also marginally decreased over the same period, from 16.1% to 15.8%. Although the proportion of those with disabilities that limited their day-to-day activities a little grew, this was outweighed by the reduction in the proportion of those with disabilities that limited day-to-day activities a lot. A very similar trend was observed in both the West Midlands and England.

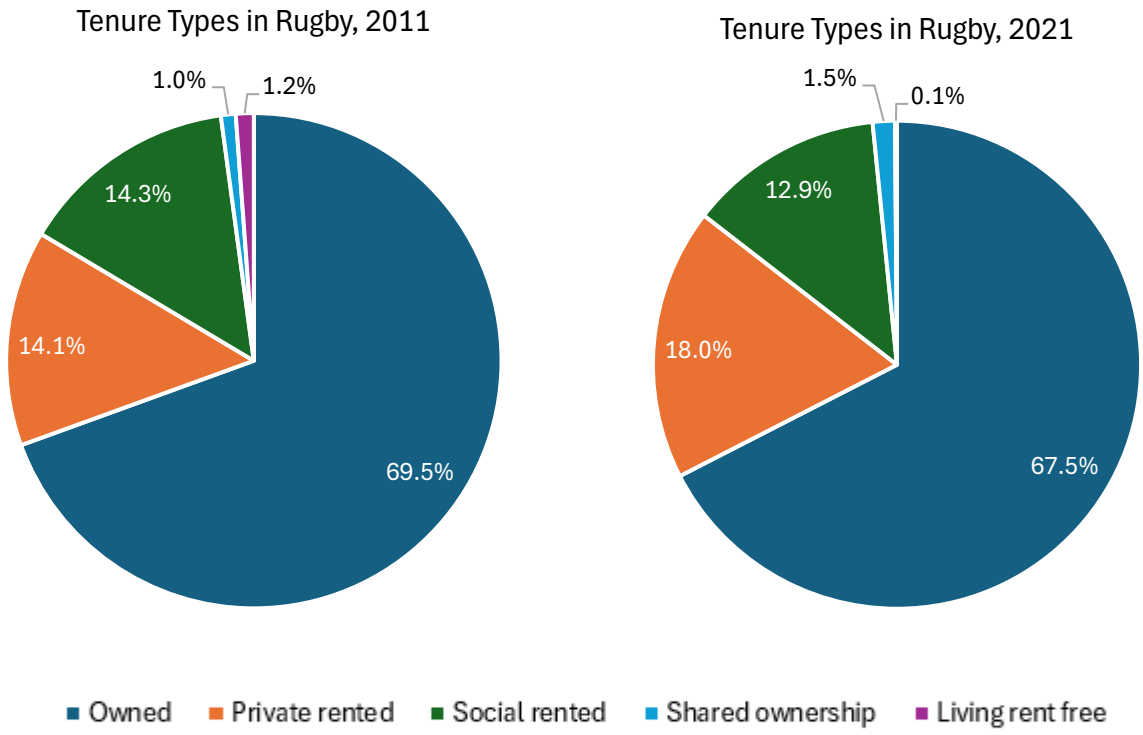
LEGAL PARTNERSHIP STATUS

4.16. The main change that occurred in the legal partnership status of Rugby residents aged 16 or over between the two censuses was an increase in the number of single residents (from 30% to 34%) and a corresponding decrease in the number of residents who were married (from 51% to 48%). The trends seen for Rugby did not notably differ from those for the West Midlands or England.

5. HOUSING

TENURE

5.1. Between 2011 and 2021 there was a noticeable shift in the housing tenure characteristics for Rugby Borough, away from ownership, social renting and living rent free towards private renting, with the latter category accounting for 18% of households in 2021 compared with 14.1% in 2011. These trends closely tracked those seen in the West Midlands and England during the same period, although Rugby Borough continued to retain a higher rate of house ownership in comparison (67.5%, compared with 62.8% and 61.3% respectively).

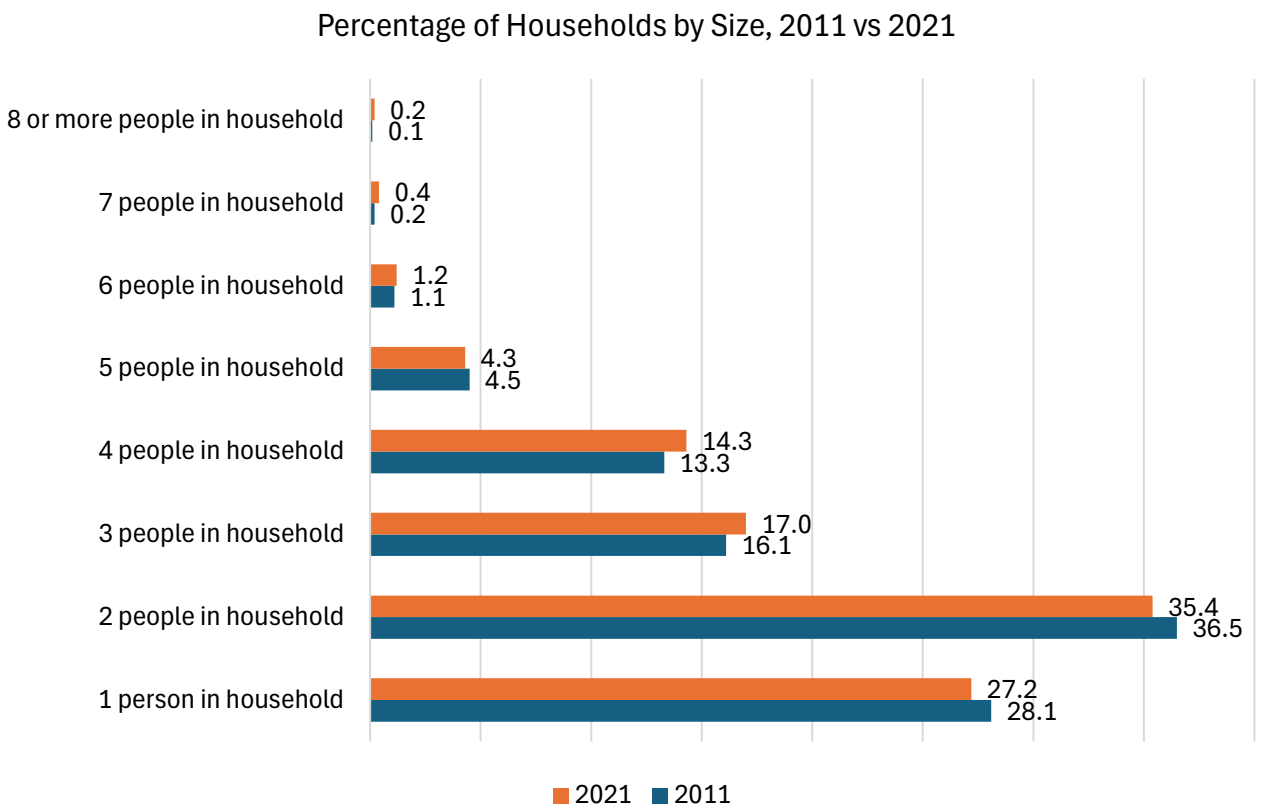


Tenure Type in Rugby and Comparators, 2021

	Rugby		West Midlands		England	
Tenure Type	**Count**	**%**	**Count**	**%**	**Count**	**%**
Owned outright	16,012	34.1	836,014	34.4	7,624,693	32.5
Owned with mortgage/loan	15,703	33.4	689,730	28.4	6,744,372	28.8
Shared Ownership	692	1.5	19,549	0.8	235,951	1.0
Social Rented	6,074	12.9	443,332	18.2	4,005,663	17.1
Private Rented	8,474	18.0	435,884	17.9	4,794,889	20.5
Living Rent Free	60	0.1	4,985	0.2	30,517	0.1

HOUSEHOLD COMPOSITION AND SIZE

5.2. The changes in household composition and size over the same period were more subtle. There was a minor swing from households of one person to those of one family (of around a percentage point), and a slight increase in the proportion of households with 3 or more residents, at the expense of those with only one or two (a shift of around two percent).



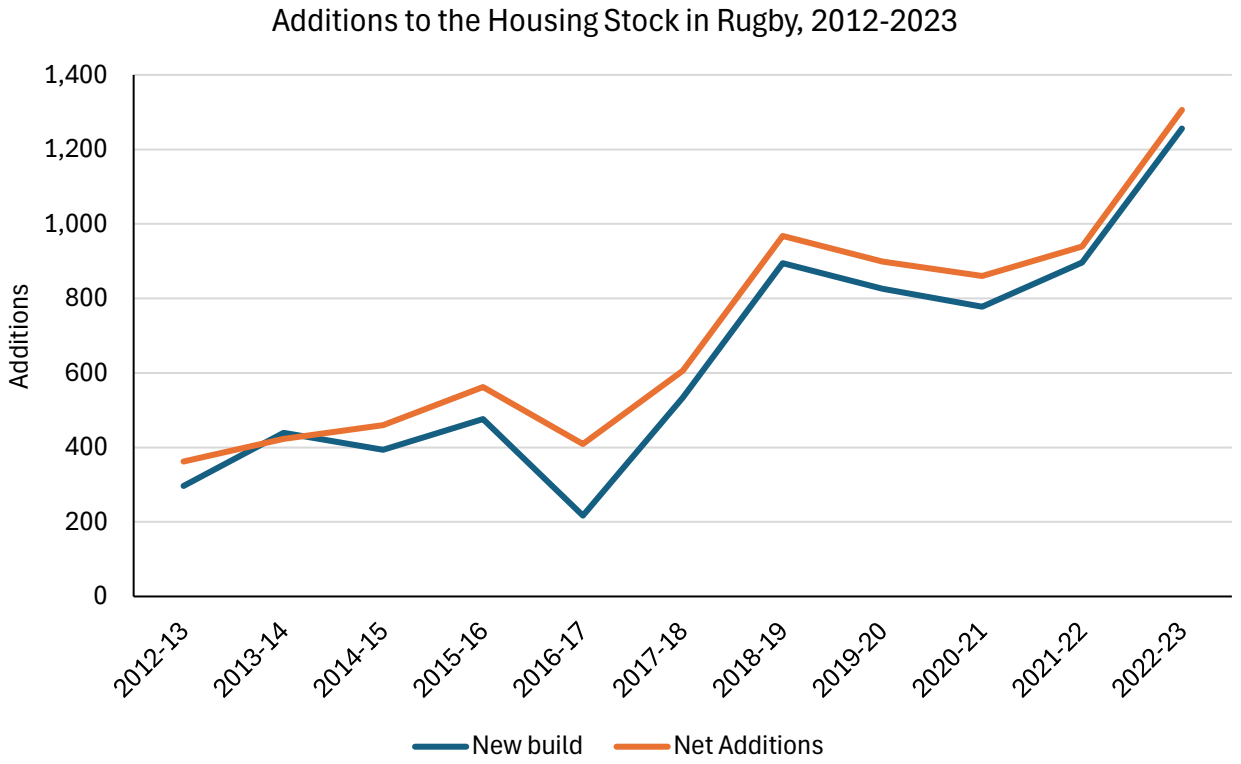
5.3. Overcrowding became marginally worse, with the proportion of households with insufficient bedrooms increasing from 2.4% to 2.8%. On the other side of the spectrum, the proportion of households with one bedroom more than required also fell (from 34.7% to 33%) while the proportion with two or more grew (from 41.4% to 42.4%). Despite this, it should be noted that in 2021 Rugby borough still had a comparably smaller proportion of households with insufficient bedrooms than both West Midlands and England.

HOUSING STOCK AND TYPE

5.4. The data on dwelling types reported by the 2021 census for Rugby Borough showed decreases in the number of terraced houses and flats formed from converted houses, and increases in all other dwelling types, with the increases in detached (+2,132) and semi-detached houses (+1,470) being the most substantial.

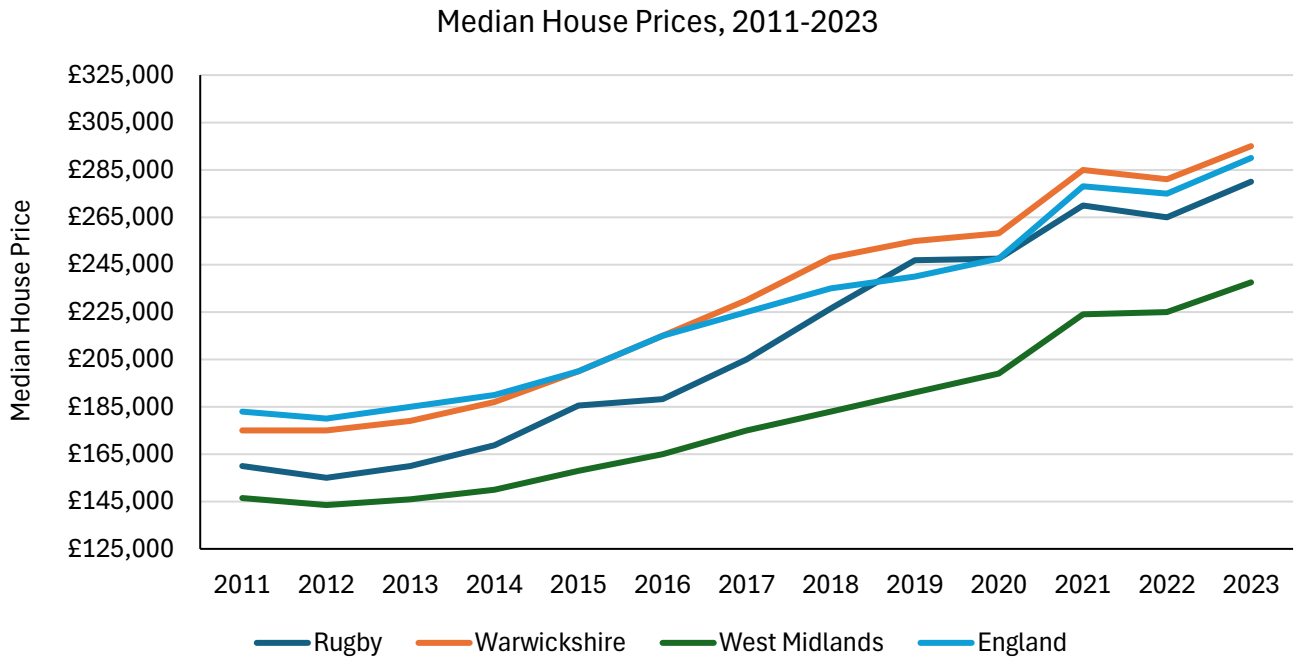
5.5. Further details regarding the housing stock in the area can be gleaned from the net additional dwellings data recorded by the ONS. This data shows that in the 11 year period of 2012-13 to 2022-23, an additional 7,795 units have been added to Rugby Borough's housing stock. Furthermore, the data shows that there has been a significant uptick in net additions since 2018-19. Over half the net additions in the 11 year period arrived in the last four years and 2022-23 alone accounts for 17%.

5.6. As may be expected, the overwhelming majority of net additions are resulting from new builds, while those deriving from conversions are negligible. The average annual net additions stemming from change of use for the period is 54, and aside from a high of 172 in 2016-17 and a low of 5 in 2013-14, the change of use figures for each year have remained close to this average. Notably, no substantial increase in net additions from change of use has been seen in 2021-22 or 2022-23, despite the widening of permitted development rights in 2021.



HOUSE PRICES

5.7. ONS data shows that the median house price in Rugby increased by 75% between 2011 and 2023, a rate of growth which is higher than that for Warwickshire (68.6%), the West Midlands (62.1%) and England (58.5%). The highest rates of growth in the Borough were seen in the years 2015-2019 and 2021. A fall in the median price was seen in 2022, however a return to growth occurred in 2023 (the latest statistics which are available).



6. LOCAL ECONOMY

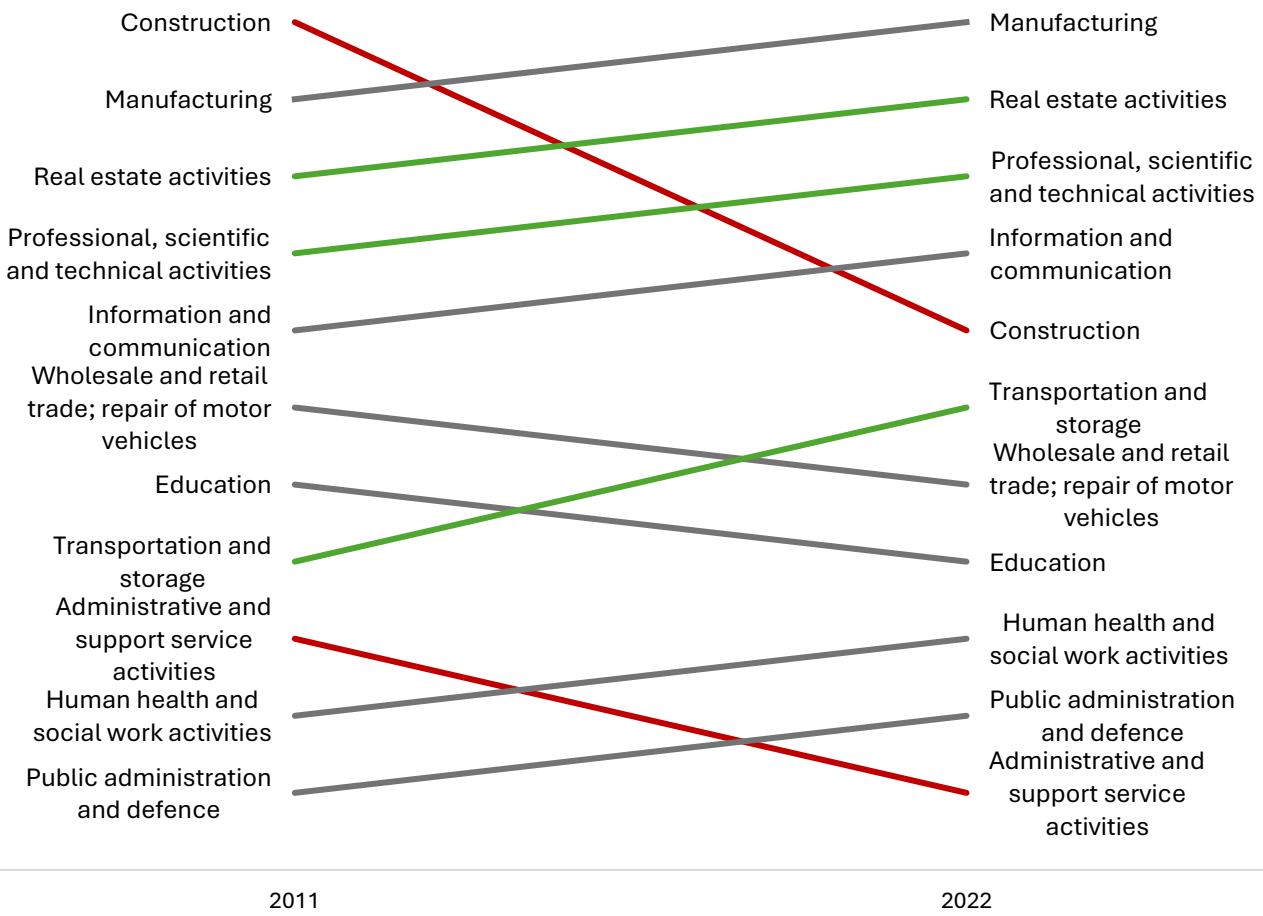
INDUSTRIES AND EMPLOYERS

6.1. There are three key ways that we can measure the industrial composition of the local economy: a) Gross Value Added (GVA) by industry, I.E. the value of goods and services produced minus the cost of inputs and materials used in the production process; b) number of employees by industry, and; c) business count by industry.

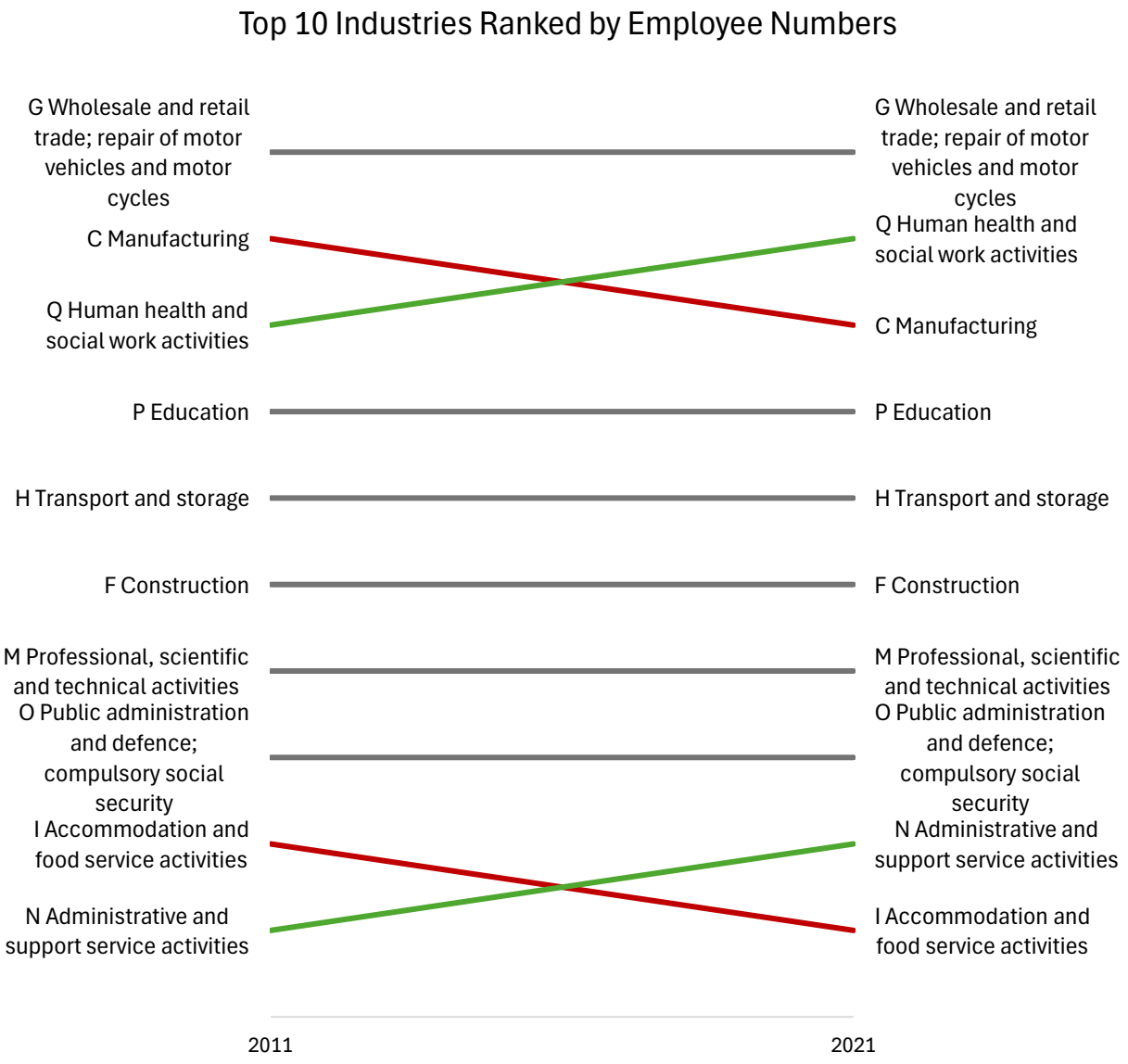
6.2. Measured by GVA, the economy of Rugby shifted quite considerably between 2011 and 2022. Real estate activities (L), professional, scientific and technical activities (M), and transportation and storage (H), all more than doubled their value added. Conversely the value added by construction (F) contracted by more than a quarter, while the value added by administrative and support service activities also decreased (by 4%) and the growth seen by arts, entertainment and recreation was anaemic (16.7%).

6.3. The changes in the relative weight of the different industrial groups according to GVA can be seen in the diagram below which shows their ranking in 2011 and 2022. Those whose GVA declined are highlighted in red, while those whose GVA more than doubled are highlighted in green.

Top 12 Industries Ranked by GVA

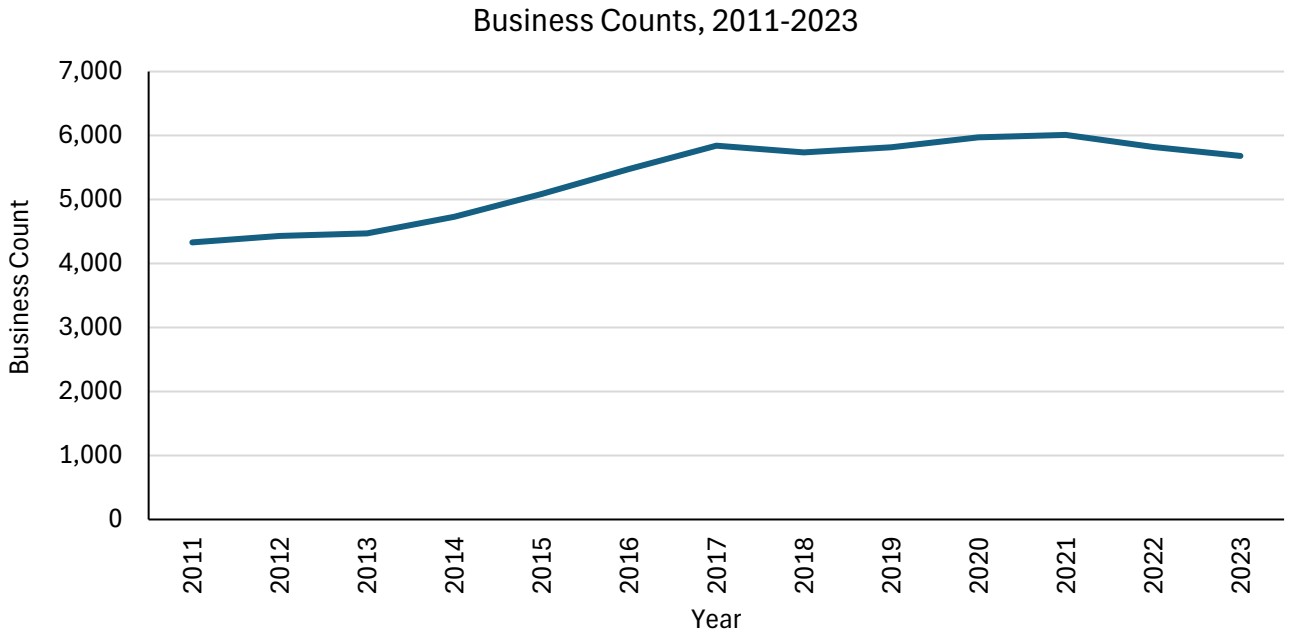


6.4. By the second measure mentioned above, the number of employees by industry, the industrial composition of the Borough's economy also experienced some notable changes. Of the 18 broad industrial groups as defined by the ONS (19a classification), 15 grew while three contracted. In absolute terms, the largest increases were seen in wholesale and retail trade (+2,072), human health and social work (+1,507), and transport and storage (+1,275). Utilities and mining and quarrying had some of the highest rates of growth (47.9% and 42.5% respectively), though they still remain much smaller than the aforementioned sectors (accounting for less than 1% of the total employees). The accommodation and food services, manufacturing, and arts, entertainment, recreation and other services groups all declined and also fell in the ranking of local industries by employee numbers as a result.



6.5. Interestingly, there was no notable correlation between the change in GVA and the change in employee numbers seen in the Borough over this period. The GVA of construction declined by 32.9% between 2011 and 2021, yet its number of employees grew by 22.7%. In contrast, the GVA of real estate activities grew by 113.9%, yet its number of employees only increased by 16.8%.

6.6. We can also seek to gauge the composition of the local economy by considering the count of businesses in the Borough by industry. As seen in the chart below, the total number of business units grew by 39% in the period 2011-2021, but declined by 5.5% in the two years which followed. According to this data, in the period of 2011-2023, transport and storage was far and away the greatest growth sector, with an additional 490 local units being accounted for in 2023 as compared to 2011. Elsewhere, growth in units was predominantly concentrated in business administration (+150 units); professional, scientific, and technical (+140 units); and construction (+130 units).



6.7. Greater clarity can be also provided by assessing the business counts according to the number of employees per unit. Between 2011 and 2021, the number of businesses with nine or fewer employees increased by 1,640 (45.4%), but then contracted by 365 (-6.9%) in the two years which followed. The trend for large businesses (250+ employees) was the opposite: no growth was seen at all in 2011-2021, and yet an additional ten were registered in 2022-2023 (+40%). Notably, Rugby Borough had no local units with over a thousand employees until 2023, at which point five were counted.

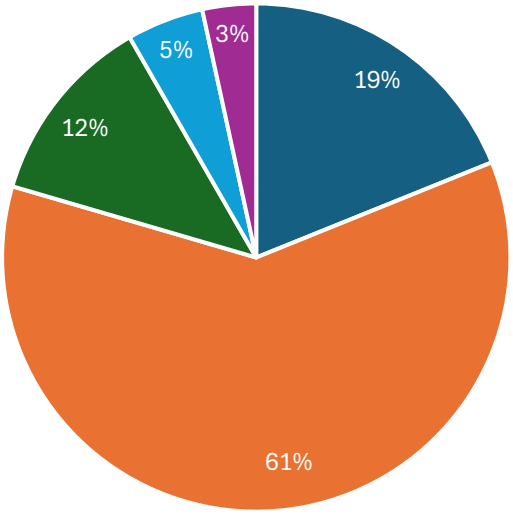
Business Count by Employment Size bands, Rugby

Employment Size band	**2011**	**2021**	**2023**
Total	4,330	6,010	5,680
Micro (0 to 9)	3,615	5,255	4,890
Small (10 to 49)	555	600	615
Medium-sized (50 to 249)	135	135	140
Large (250+)	25	25	35

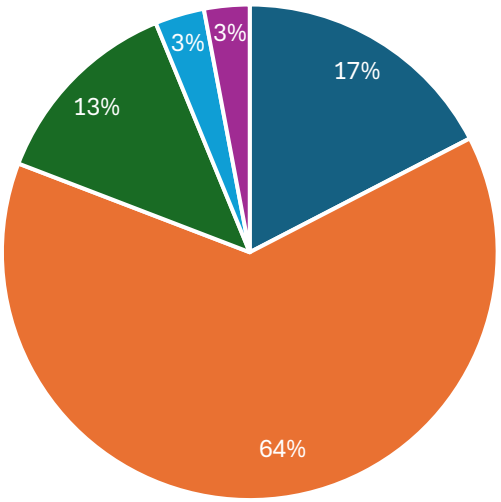
EMPLOYMENT

6.8. The latest census showed a decrease in the number of those who were unemployed in 2021 compared to 2011, and a corresponding increase in the number of people in employment. The fall in unemployment was proportionally smaller than that seen in the West Midlands as a whole, yet the unemployment rate in the Borough still remains substantially lower by comparison (3.2% vs 5.4%). Looking at the proportional make-up of those in employment, there was also a clear shift away from part-time work to full-time work and self-employment in the Borough. This is similar to the trends seen in the West Midlands and England, although the shift towards self-employment was less pronounced in Rugby.

Economically Active Residents, 2011

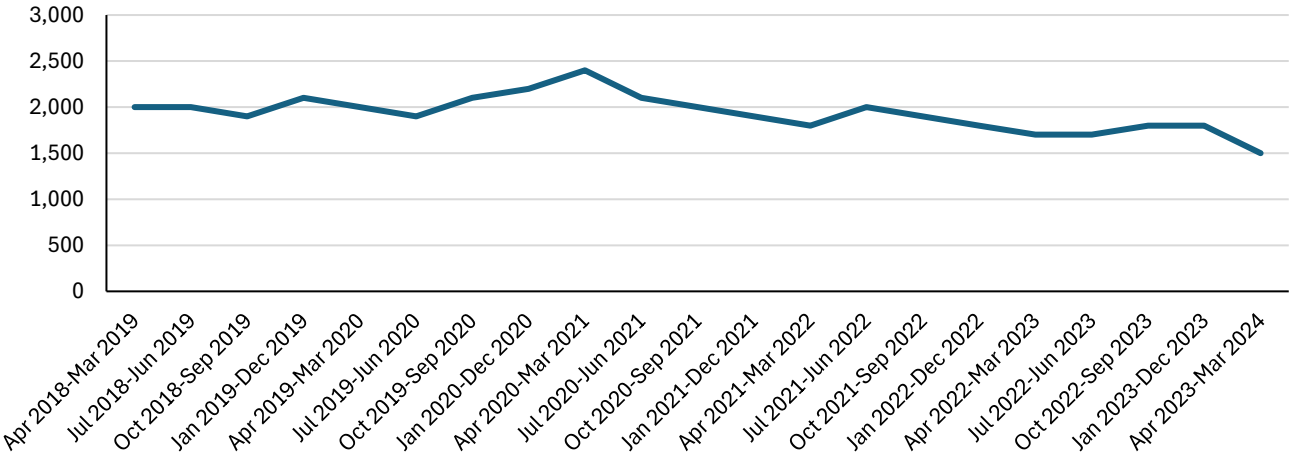


Economically Active Residents, 2021



6.9. To gain an understanding of how the Borough has performed since the 2021 census, we can turn to model-based unemployment estimates produced by the ONS. These would suggest that unemployment increased marginally in 2020-21, but has since reduced to a level which is comparable to, if not slightly better than that seen before.

Unemployment Estimate, 2019-2024



EARNINGS AND HOURS

6.10. Per the annual survey of hours and earnings, the median annual gross earnings of the residents of Rugby Borough in employment was £33,025 in 2023, higher than both the West Midlands (£28,352) and England (£29,919). The median for Rugby residents in 2023 was 42.8% higher than the same figure for 2011 – a higher percentage increase than that for England (39.5%) but marginally lower than the West Midlands (43.9%).

6.11. The median annual gross earnings of those in employment with a workplace in Rugby Borough was £29,894 in 2023, 35.1% higher than the same figure for 2011. The fact that the workplace median remains lower than the resident median, and has grown at a slower rate, would suggest that on average, a higher proportion of more skilled Rugby residents are working outside the local authority area.

6.12. The median hours worked by both resident employees and workplace employees remained steady at 37 hours with only minor fluctuations from year to year.

JOBS TO EMPLOYEES RATIO

6.13. By comparing the number of employees with a workplace in the Borough to the number of employees resident in the Borough (as measured by the annual survey of hours and earnings), we can attain a rough estimation of the degree to which the Borough is providing jobs relative to the size of its employee population.

6.14. These estimates show that since 2011 Rugby Borough has shifted from providing a number of jobs which was well below its number of resident employees to providing a number of jobs which is close to parity with its number of resident employees.

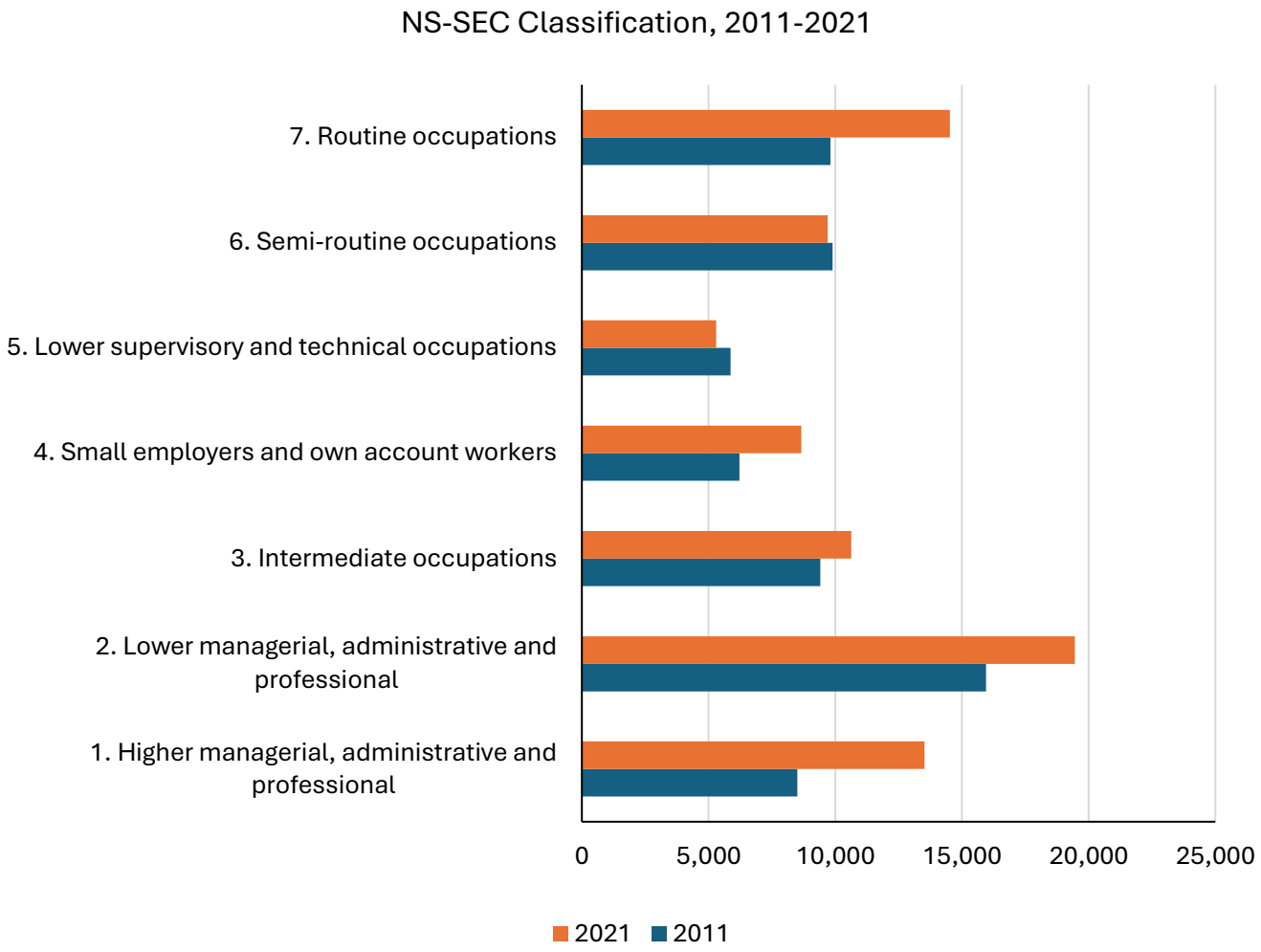
Year	Workplace Employees	Resident Employees	Workplace/ Resident Ratio
2011	35,000	46,000	76.1%
2012	38,000	45,000	84.4%
2013	38,000	46,000	82.6%
2014	36,000	48,000	75.0%
2015	41,000	52,000	78.8%
2016	39,000	52,000	75.0%
2017	42,000	49,000	85.7%
2018	36,000	45,000	80.0%
2019	48,000	51,000	94.1%
2020	47,000	43,000	109.3%
2021	49,000	50,000	98.0%
2022	52,000	56,000	92.9%

6.15. The trend observed above is broadly in-line with the jobs density data produced by the ONS (numbers of jobs per resident aged 16-64) which shows that the jobs density for Rugby has increased from 0.79 in 2011 to 0.87 in 2022. Of the 30 local authorities in the West Midlands, the Borough ranks 13th by this measure. However, it is only 19th when ranked by degree of improvement to jobs density since 2011, which would suggest it is losing ground to other authorities in the region.

6.16. What these figures do not reveal is the proportion of resident employees who are travelling outside of the Borough for work. A rough estimation of this could hypothetically be derived from the data regarding distances travelled to work from the census. The 2021 census showed a significant decrease in distances travelled and a massive increase in the proportion of employed residents working from home. However, this was no doubt heavily skewed by the COVID-19 lockdown which was in place at the time the census was conducted, and therefore is unlikely to be reflective of resident behaviours under typical circumstances.

OCCUPATION

6.17. The census data showed a noticeable change in the occupational status of residents over the same period, with growth concentrated at the top (managers, directors, senior officials, professionals, associate professionals, technicians) and the bottom (elementary occupations) of the scale. Categories four through eight, which cover the likes of administrative roles, skilled trades, service occupations and machine operatives, all reduced in their relative weight (and in some cases even retracted in absolute terms). This bifurcated trend appears to be further confirmed by the National Statistics Socio-economic Classification (NS-SEC) data for Rugby Borough, which shows that the highest rates of growth between 2011 and 2021 have been in the first category (higher managerial, administrative and professional occupations) and the seventh category (routine occupations).



7. BUILT ENVIRONMENT

HOUSING LAND

7.1. As seen in the maps on page 21, the built environment of the Borough, and the town in particular, has changed significantly since 2011. The following extensive housing developments (of 100 or more dwellings) have been completed in Rugby town during this time:

- Cawston: 1,294 dwellings across the five sites shown
- Technology Drive: 635 dwellings
- Former Cattle Market, Craven Road: 360 dwellings
- Former Warwickshire College, Lower Hillmorton Road: 131 dwellings
- Land off Snessdale Road, Coton Park: 110 dwellings

7.2. Other sites that have been partially built-out during this time period too, include:

- Rugby Radio Station (Houlton), where a total of 6,200 dwellings are planned
- Rugby Gateway, where a total of 1,300 dwellings are planned
- Land to the north of Ashlawn Road, where a total of 860 dwellings are planned

7.3. While some housing development has been contained within the existing boundaries of the town (such as the Technology Drive site), the majority of completions have been located on the outskirts, acting to considerably expand the urban spread of the town. Furthermore, this trend is set to continue with the forthcoming developments in Rugby South West and Coton Park East.

7.4. Outside of Rugby town, the main rural settlements of Binley Woods, Long Lawford, and Wolston have all seen relatively major housing developments too, while the creation of 76 dwellings at Coton House has established a new small rural village to the north of the town.

EMPLOYMENT LAND

7.5. Since 2011, there has also been considerable development of employment land. The major completions of employment developments in Rugby Borough, in descending order of total floorspace, are as follows:

- Ansty Park and Prospero: 222,227 sqm
- Prologis, Ryton-on-Dunsmore: 191,469 sqm
- Rugby Gateway, Rugby town north: 113,161 sqm
- Symmetry Park, Thurlaston: 89,800 sqm
- Central Park, Rugby town north: 41,459 sqm
- Britvic, Swift Valley Industrial Estate, Rugby town: 20,043 sqm
- Stepnell Park, Rugby town west: 7,940 sqm
- SUEZ Malpass Farm, Rugby town west: 7,700 sqm
- Europark, east of Newton: 7,227 sqm
- Parkfield Road Business Park, Rugby town west: 5,491 sqm

7.6. Some of these developments have occurred on sites vacated by former employers, as is the case with the former car manufacturing plant in Ryton-on-Dunsmore, or involve the expansion of active occupied sites, as is the case with Britvic. However, others, such as Rugby Gateway and Symmetry Park, have involved the change of use of substantial tracts of agricultural or otherwise rural land. As such, taken as a whole, the employment development seen since 2011 has also acted to expand the built-up land area of the Borough.

7.7. The information regarding employment development completions in Rugby shown above can be contextualised using data from the West Midlands Strategic Employment Site Study (WMSESS) 2024, which covers local authority areas spanning Coventry & Warwickshire, Greater Birmingham and Staffordshire. The WMSESS shows that of these three sub-areas, Coventry & Warwickshire saw by far the highest growth in strategic manufacturing and logistics floorspace (I.E. net deliveries) between 2011 and 2022.

Change in strategic floorspace by market area, 2012 to 2022

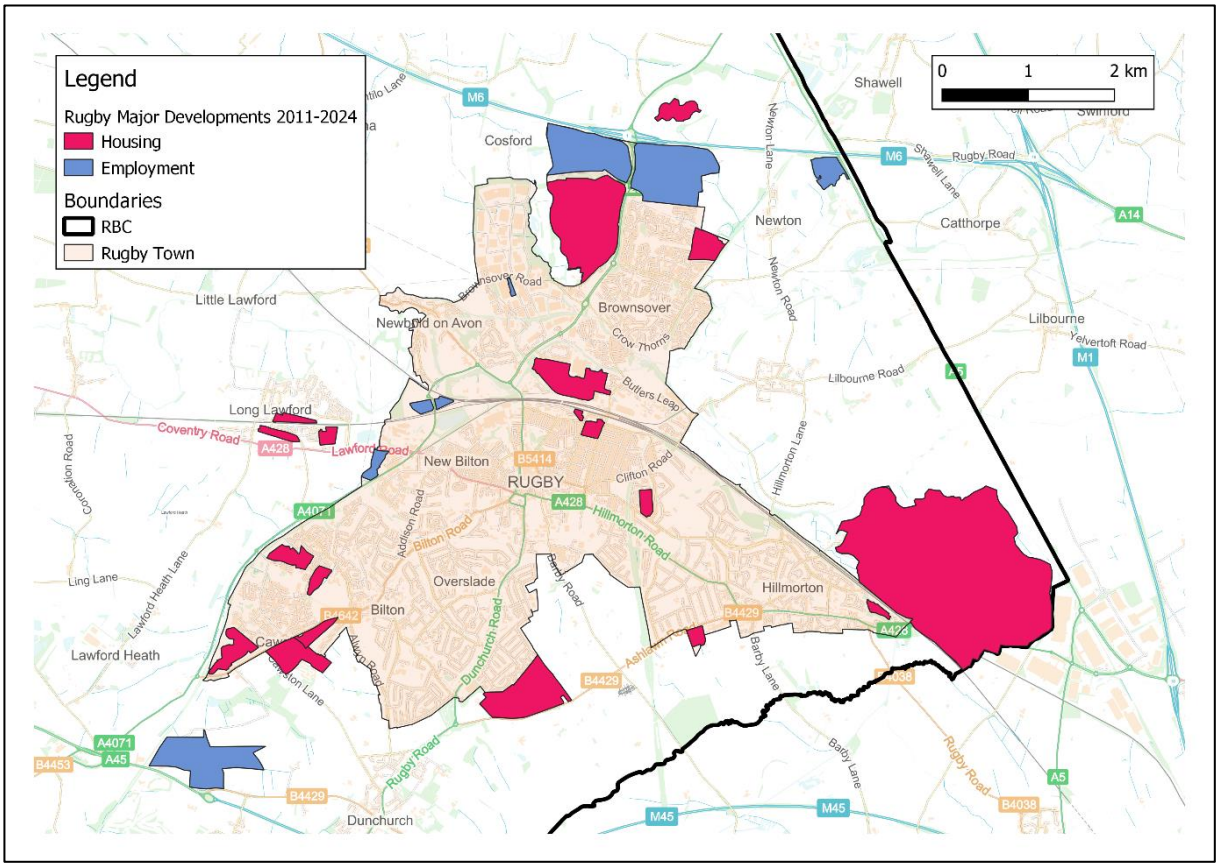
Area	Strategic Floorspace (sqm)	% of Study Area Floorspace	Change 2012-2022 (sqm)	% Change 2012-2022
Greater Birmingham	6,864,125	42%	608,833	10%
Cov & Warwickshire	4,384,387	27%	1,268,562	41%
Staffordshire	5,010,240	31%	933,661	23%
Study Area Total	16,258,752	100%	2,848,217	21%

7.8. Although the WMSESS does not break this net deliveries data down by local authority, the Study does provide strategic completions data at such a scale. As such, we can see that between 2011 and 2022, Rugby had the second highest level of completions of strategic manufacturing and logistics development, as measured by floorspace, within the study area. The only area which registered more was North Warwickshire.

Strategic unit completions by local authority area, 2011/12 to 2021/22

Local Authority	No. of Units	Floorspace (sqm)
North Warwickshire	16	1,100,707
Rugby	15	472,697
Birmingham	18	328,740
Stoke on Trent	16	291,820
South Staffordshire	6	267,323
Warwickshire Average	13	323,395
West Midlands Study Area Average	5	157,419

Rugby Town Major Developments Map



Rugby Borough Major Developments Map