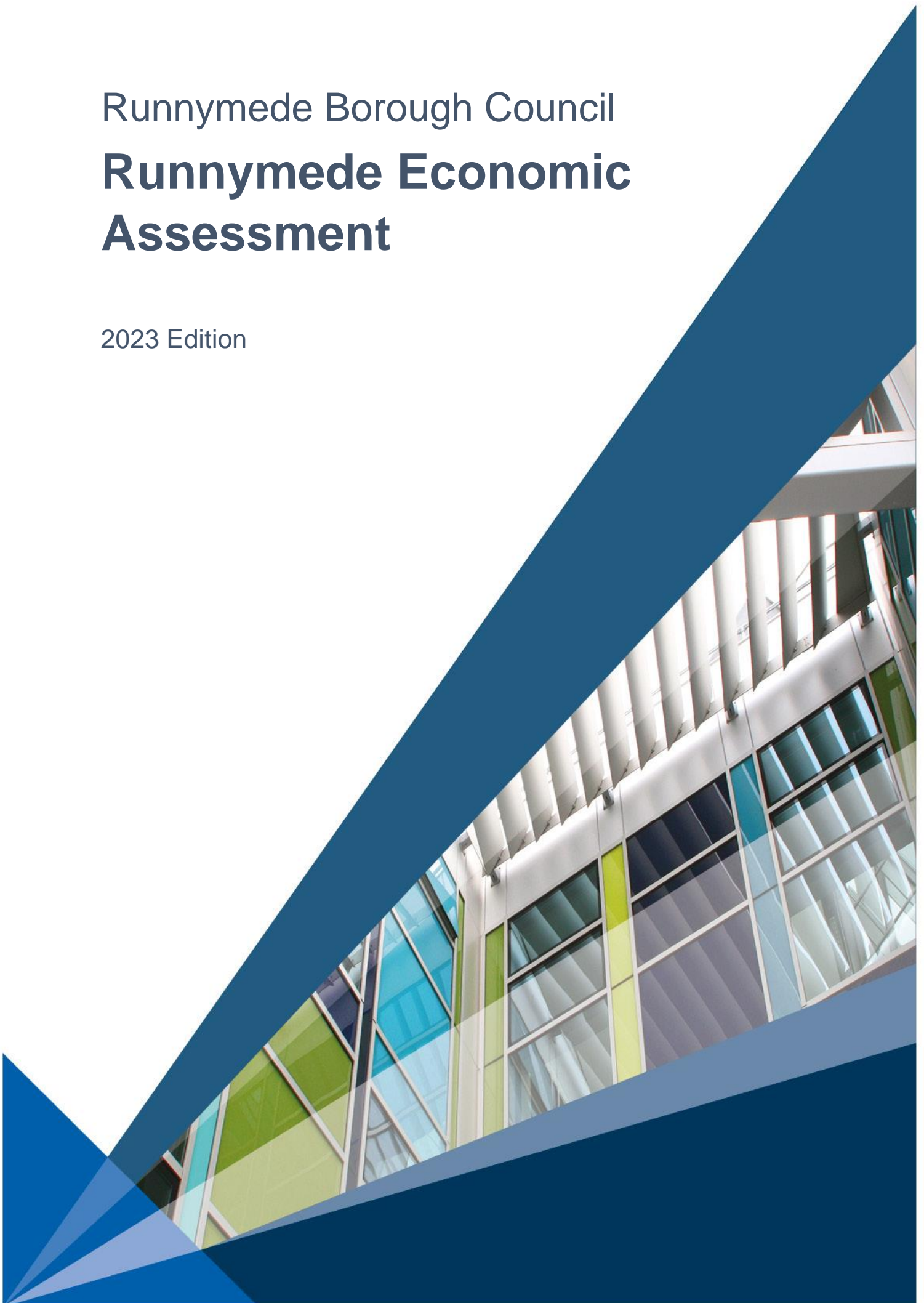


Runnymede Borough Council  
**Runnymede Economic  
Assessment**

2023 Edition



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# Chapter 1: Introduction

## Executive Summary

Located in the North of Surrey, Runnymede is a prosperous borough and an important centre for business within the South East of England. The borough's locational advantages and excellent connectivity, combined with its skills base and high-quality environment, makes it an attractive location to do business. Offering quick access to Heathrow Airport as well as Central London, it is home to many national and international businesses including Netflix, Gartner, and Samsung.

Despite the tough national economic climate, Runnymede's local economy continues to outperform the national picture on numerous economic indicators. 2023 has seen the borough retain its rank as the most competitive local authority district in the UK outside of London (Source: UK Competitiveness Index 2023). The borough has also seen the percentage of working age adults who are economically active rise to 80.8% by the end of 2022, which is now well above the national average of 78.2% (Source: ONS, Annual population survey, 2022).

Like the wider region, however, the challenges posed by the ongoing cost-of-living crisis are beginning to impact the local economy. The borough recorded a 2.0% decrease in the number of active businesses year-on-year in 2022, the first fall since 2019. This figure is compared to a drop of 1.7% within the South East, and a negligible rise of 0.04% nationally (Source: ONS, Inter Departmental Business Register 2022). In spite of this, Runnymede's economy continues to punch above its weight, maintaining its position as the local authority with the seventh highest GDP per capita in the United Kingdom, attributable to the high proportion of national and international headquarters located within the borough. This remains the highest figure for anywhere in the country outside of London (Source: ONS, Regional gross domestic product: local authorities, 2023).

Through data and analysis, this report seeks to demonstrate the economic strength of the borough, as well as draw attention to any areas of concern or opportunity. It also makes note of the pockets of deprivation that exist in an otherwise relatively affluent borough, highlighting the need to take action to level up the borough and provide support to the communities that risk being left behind.

This assessment is intended to act as a comprehensive guide of local economic statistics and should be considered in tandem with the Council's recently published Economic Development Strategy for 2022 to 2026, which sets out the priorities for sustainable growth in the borough's economy based partly on the data outlined in this document.

### What is covered by the assessment?

This assessment outlines the overall economic performance, competitiveness, and productivity of Runnymede. It covers the following themes:

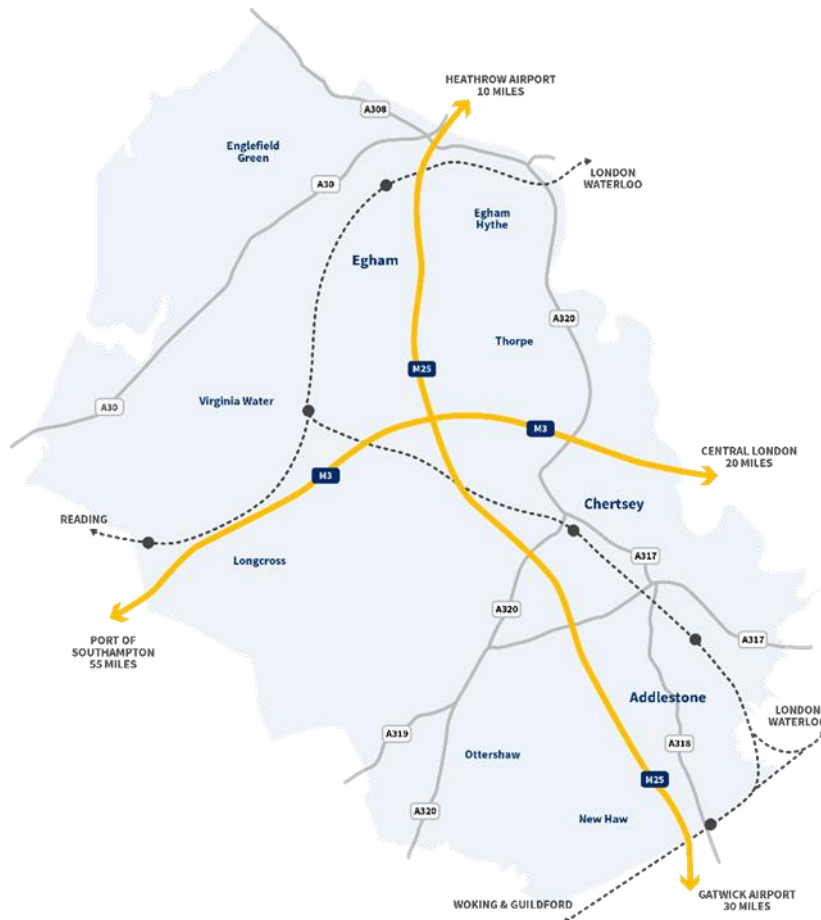
- People and Communities
- Labour Supply and Demand
- Economic Competitiveness
- Business and Enterprise
- Deprivation in Runnymede

It is informed by official measures of economic well-being and competitiveness and other economic, social, and environmental indicators. To help understand the borough's economy the report compares Runnymede to neighbouring boroughs in Surrey, as well as regional and national data.

## Runnymede: an overview

The borough of Runnymede is located in North West Surrey, 20 miles from Central London. The latest figures indicate that Runnymede has a population of 88,100 (Source: Census 2021). The key urban centres in the borough are Egham, Chertsey, and Addlestone, with other important settlements in the borough including Virginia Water, Englefield Green, and Ottershaw. 74.3% of the borough lies within the Metropolitan Green Belt, making Runnymede an attractive destination to live and visit (Source: DLUHC, Local authority green belt statistics for England, 2022).

Figure 1: Map of Runnymede



Each of Runnymede's towns offer a range of shops, services and employment uses. Addlestone, home to the offices of Runnymede Borough Council, has recently undergone regeneration with the mixed-use Addlestone ONE development. Chertsey is a historic town developed around a Benedictine Abbey dating from the Saxon era. Egham is the closest town to Royal Holloway, University of London, and its town centre has recently benefitted a £90 million regeneration project by Runnymede Borough Council, with the Magna Square development opening in 2022.

The borough has a rich cultural and leisure offering. Chertsey is home to the 170-acre Chertsey Meads Local Nature Reserve, with meadows adjacent to the River Thames providing leisure opportunities. Thorpe Park, the UK's second most visited theme park is also located in Runnymede. The borough is also home to the historic landscapes of Runnymede Meadows, the location where the Magna Carta was signed, as well as other attractions including Savill Gardens, Windsor Great Park, and the highly exclusive Wentworth Golf Club.

Runnymede is well connected by rail, road, and air. The borough has six railway stations, all providing direct links into central London and other major settlements. Travel into London Waterloo by train can take as little as 45 minutes. The M3 and M25 motorways intersect the borough, providing easy connections to Southampton, Basingstoke, London and the wider South East. The UK's busiest airport, Heathrow, is located five miles from the borough's border and can be accessed by road in as little as fifteen minutes.

The borough borders five other local authorities. Four of these, Spelthorne, Elmbridge, Woking, and Surrey Heath, are located in Surrey, with Windsor and Maidenhead bordering the north-west of the borough. Nearby settlements include the towns of Staines-Upon-Thames, Weybridge, Woking, Windsor, and Guildford.

Runnymede sits on the boundary of two Functional Economic Areas (FEAs). The northern half of the borough lies within an FEA focussed around Heathrow Airport, a significant driver of the local economy. Runnymede's Southern half is within an FEA encompassing much of the commuter belt located beyond the outskirts of South West London, encompassing much of the M3 corridor. The purpose of an FEA is to give an idea about the nature of the broader local economy. They include travel to work areas, housing market areas and other connected indicators such as transport networks and flows of goods, services, and people.

As indicated by Figure 2, Runnymede is located within the north-eastern quarter of the Enterprise M3 Local Economic Partnership (EM3 LEP) area. Major settlements in the EM3 LEP include Guildford, Basingstoke, Woking, and Farnborough. LEPs are, at present, the main drivers of economic development at the sub-national level, bringing business and civic leaders together to drive sustainable economic growth and create the conditions for private sector job growth in their areas. At the time of publication, the future of LEPs remains uncertain, with it likely that upper-tier local authorities will assume much of their current activities in the near future. For Runnymede specifically, this likely means that Surrey County Council is to take over the present responsibilities of the LEP.

**Figure 2: Map of the EM3 LEP**



In summary, Runnymede is an important player in the regional economy, but is an economy that is part of a wider interconnected system, with the borough relying on its diverse connections with other local authority areas across Surrey and the wider South East. This makes a coordinated approach to the wider local economy, including infrastructure, development, and transport, necessary to ensure the continued sustainable economic growth of the area.



# Chapter 2: People and Communities

## Population

Runnymede is a relatively small borough, but one that is growing significantly. The latest figures indicate that Runnymede has a population of 88,100 (Source: Census 2021). This makes Runnymede the 27<sup>th</sup> smallest local authority district in the UK, and the 4<sup>th</sup> smallest in Surrey.

The borough has demonstrated significant growth in recent years, with a 9.4% rise in population between the 2011 Census and the 2021 Census. This is the second highest growth rate of the eleven districts and boroughs in Surrey and is significantly above the English average of 6.6% and the South East average of 7.5% (Source: Census 2021). This is also a much higher growth rate than the 3.2% rise experienced between the 2001 Census and 2011 Census. The ONS projects that the population of Runnymede will continue to rise, with an expected population of 94,236 by 2028 (Source: ONS, Population projections for local authorities, 2020).

Despite a small population relative to other local authorities, Runnymede has a population density of 1,129 people per square kilometre (Source: Census 2021). This makes Runnymede the sixth most densely populated borough of the eleven districts in Surrey. Table 1 below compares the population density of Runnymede to the wider region and England.

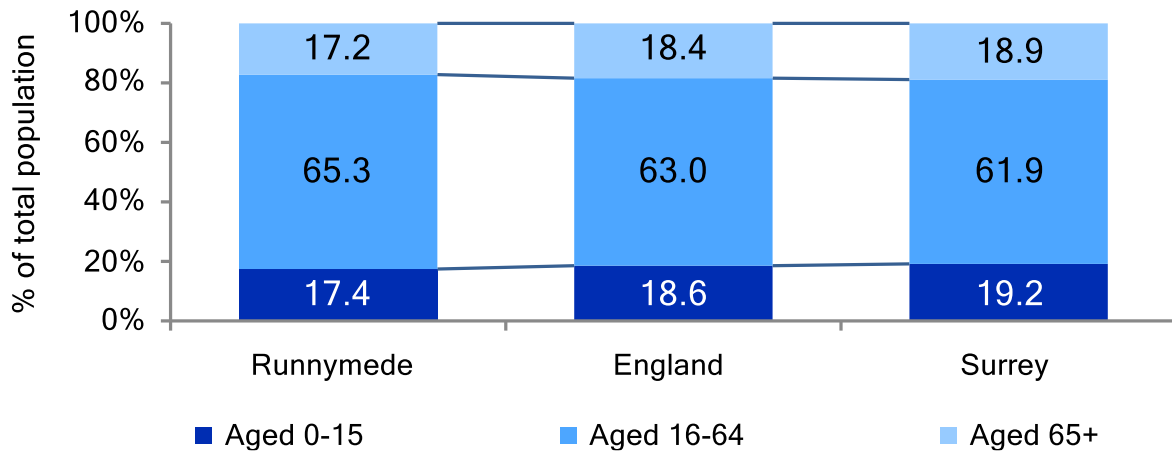
**Table 1: Population Density (people per square kilometre)**

| Runnymede | Surrey | South East | England |
|-----------|--------|------------|---------|
| 1,129     | 716    | 486        | 434     |

Source: Census 2021

Figure 3 shows the age breakdown of the population in Runnymede compared with Surrey and England as a whole. It shows that Runnymede has a higher proportion of working aged residents, with fewer people aged 0-15 and fewer residents over the age of 65.

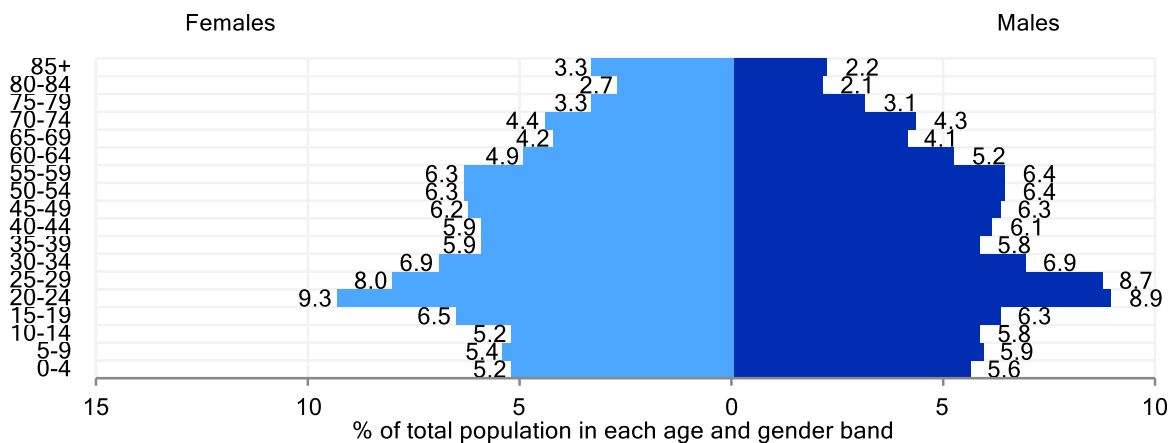
**Figure 3: Population of Runnymede by Age**



Source: Census 2021

Runnymede has a median age of 39 years old (Source: Census 2021). This is the joint youngest median age in Surrey, alongside Guildford. This compares to a figure of 41 years old across the South East and 40 years old across England (Source: Census 2021). The chart below provides a more detailed outline of the age of Runnymede residents, placing the population into five-year bands.

**Figure 4: Runnymede Population Estimates by five-year age bands**

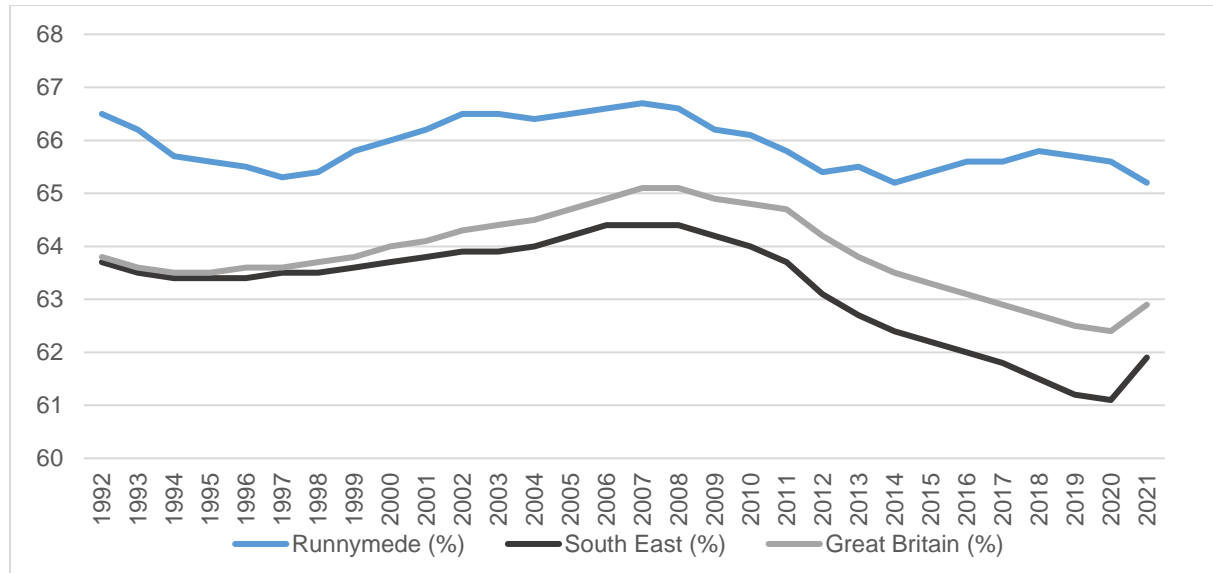


Source: ONS mid-year population estimate 2020

The below graph indicates that between 1992 and 2021, the proportion of working aged adults (those between the ages of 16-64) in Runnymede has fallen from 66.5% to 65.3%. This is reflective of the wider trend of an aging population seen across the country, although Runnymede has seen a significantly smaller decrease in the proportion of working age residents compared to the South East and Great Britain as a whole, with the borough retaining a higher than average proportion of working

aged adults. This places Runnymede in a strong position nationally, negating some of the wider economic challenges that an aging population brings such as reduced economic productivity.

**Figure 5: Percentage of working age adults (aged 16-64) in Runnymede from 1992 to 2021**

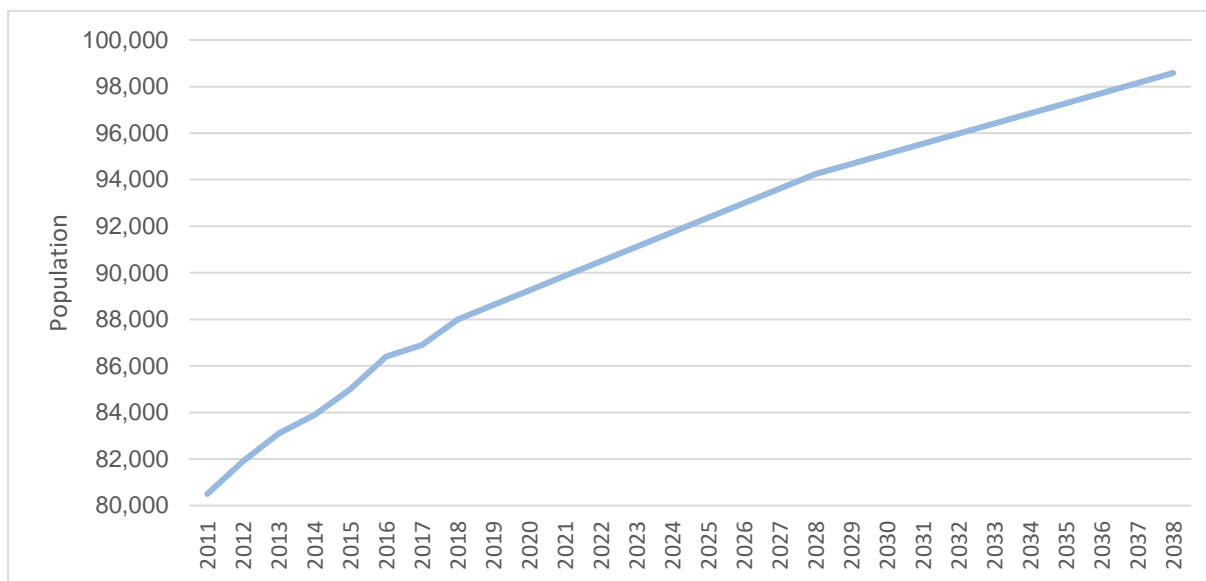


Source: ONS mid-year population estimates 1992-2021

Runnymede’s population has grown at a fast rate in recent years. Between the 2011 and 2021 Census, the borough witnessed a growth rate of 9.4% which vastly exceeds the same rate of 3.2% observed between the 2001 and 2011 censuses (Source: Census 2001, 2011, 2021).

The borough’s population is set to continue this high growth rate in the coming years. The Office for National Statistics projects that Runnymede’s population is expected to stand at 94,236 by 2028, an increase of 6.9% from the 2021 Census. By 2038, the population of Runnymede is expected to rise to 98,584, an increase of 11.9% from 2021. Runnymede’s projected population growth rate to 2038 is significantly higher than the Surrey-wide figure of 1.5% for the same period and also exceeds the projected growth for the South East and England as a whole, which stand at 5.6% and 7.5% respectively. (Source: Census 2021 and ONS Population projections for local authorities, 2020).

**Figure 5: Past and Projected population growth for Runnymede**



Source: ONS, Population projections for local authorities, 2020.

## Community and Lifestyle

Runnymede is a relatively healthy borough. As Table 2 indicates, life expectancy at birth is higher than both the South East and English average. Mortality for under 75s is lower than the England average, though the borough has a higher rate of death from cardiovascular disease than the English average. Deaths from cancer and suicide are both lower than the English and South East averages.

**Table 2: Public Health in Runnymede**

|   | <b>Runnymede</b> | <b>South East</b> | <b>England</b> |
|---|------------------|-------------------|----------------|
| Life expectancy (male)  | 80.8             | 80.6              | 79.4           |
| Life expectancy (female)  | 84.5             | 83.8              | 82.8           |
| Under 75 mortality rate from all causes (per 100k)              | 329.5            | 320.2             | 363.4          |
| Under 75 mortality rate from cardiovascular diseases (per 100k) | 80.1             | 63.1              | 76.0           |
| Under 75 mortality rate from cancer (per 100k)                  | 110.9            | 112.9             | 121.5          |
| Suicide rate (per 100k)   | 8.5              | 10.6              | 10.4           |

Source: Public Health England, Local Authority Health Profiles, 2023

Note: Life expectancy data is for 3 year range (2018-2020), Mortality data is for 2021

## **Analysis and Summary**

These indicators provide a long-term outlook on the demographics of Runnymede residents. Like much of the country, the borough must be aware of the longer-term challenges arising from having an aging population. Runnymede, however, appears to be in a strong position by having a median age that is much lower than its neighbours, as well as below the national average.

By far the most significant change that the borough is set to experience in coming years, however, is its growth in population. Runnymede is set to see a much greater increase in population in the coming years compared to the wider county, region, and country, with it vital that this projected population growth that the borough is set to experience is accounted for in local policies.

Increasing population sizes will place pressure on the capacity of existing public services and housing stocks, meaning that it is highly important to plan well in advance for future growth to ensure sufficient resources are in place to maintain the high quality of life presently experienced in Runnymede. An increased population however is also a significant opportunity for the area, laying the foundation for future sustained economic growth by providing an increased labour force as well as a greater market for local businesses.

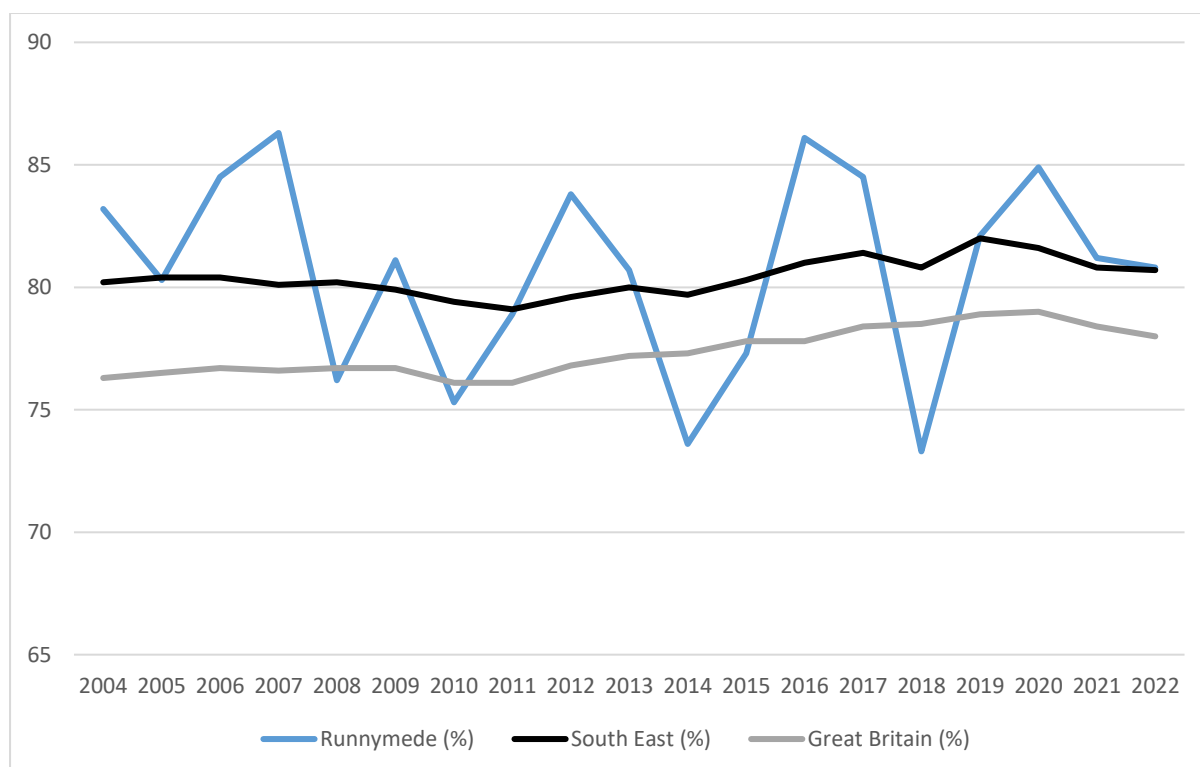
# Chapter 3: Labour Supply and Demand

An appropriately skilled labour market is a key component of any successful economy. This chapter considers the supply of labour in Runnymede by looking at statistics including the economic activity rates, skills and qualifications levels, employment by sector, earnings, and occupations.

## Economic Activity and Unemployment

The proportion of working aged adults in Runnymede that are considered economically active (80.8%) is higher than both the national figure (78.0%) and that of the South East (80.7%) (Source: ONS Annual Population Survey 2022). Figure 6 charts the proportion of economically active working age adults over time. Whilst it appears to show that the figure for Runnymede tends to fluctuate much greater than regional and national averages, this is likely due to the ONS Annual Population Survey using a smaller sample size for Runnymede due to its smaller population, which makes it subject to heavier fluctuations. As such, these figures should be seen as indicative estimates.

Figure 6: Percentage of Economically Active Working Aged Adults (2004-2022)



Source: ONS Annual Population Surveys 2004-2022

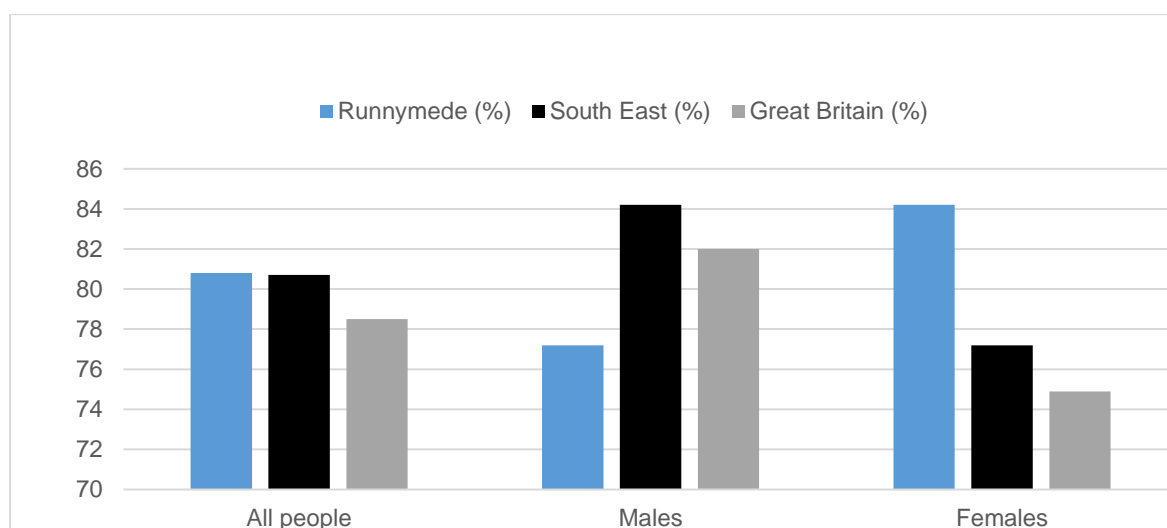
It is notable that, when splitting economic activity rates by gender, Runnymede varies significantly from national and regional trends. In the borough, a significantly greater proportion of working age females are considered economically active compared to men, whilst nationally, men are considerably more likely to be economically active than women. The proportion of economically average working age females is 9.2% above the national average, whilst the same figure for males in Runnymede is 4.8% below the national average. The below table and graph visualise this in further detail.

**Table 3: Percentage of Economically Active Working Aged Adults Split by Sex**

|              | Runnymede    | South East   | Great Britain |
|--------------|--------------|--------------|---------------|
| Male         | 77.2%        | 84.2%        | 82.0%         |
| Female       | 84.2%        | 77.2%        | 74.9%         |
| <b>Total</b> | <b>80.8%</b> | <b>80.7%</b> | <b>78.0%</b>  |

Source: ONS Annual Population Survey 2022

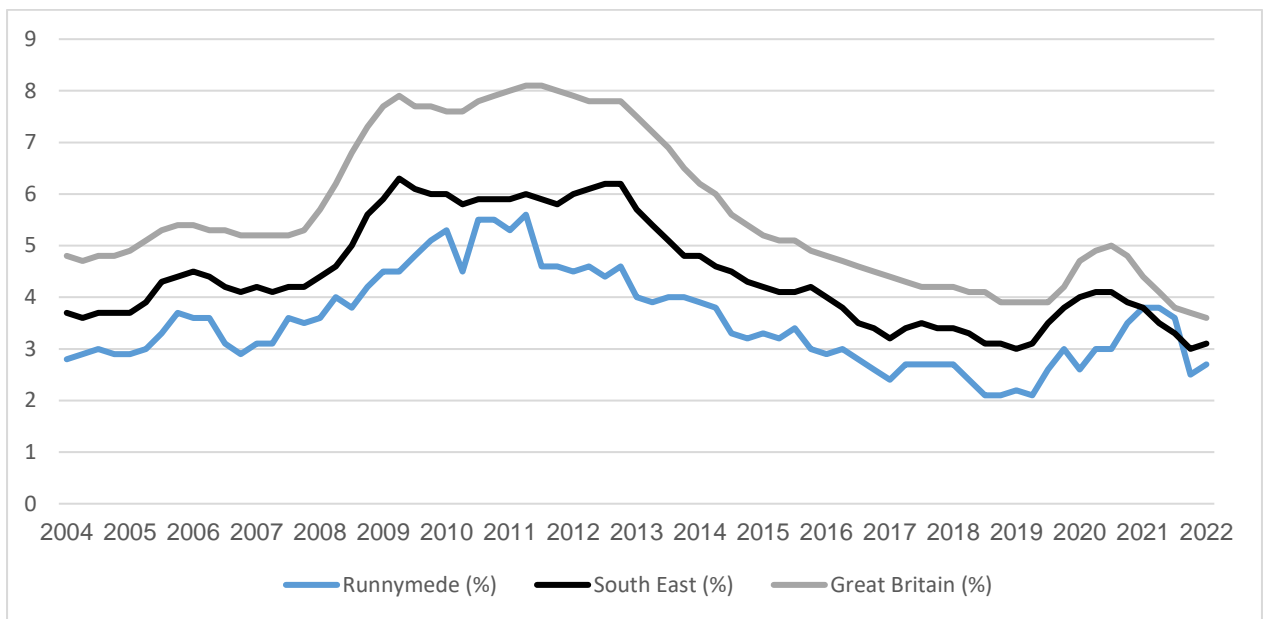
**Figure 7: Percentage of Economically Active Working Aged Adults Split by gender**



Source: ONS Annual Population Survey 2022

In 2022, Runnymede’s unemployment rate stood at 2.7%, compared to 3.1% in the South East and 3.6% across Great Britain (Source: ONS Annual Population Survey 2022). Figure 8 demonstrates that Runnymede has consistently maintained an unemployment rate below the national average and, barring a short period in 2021, below the regional average.

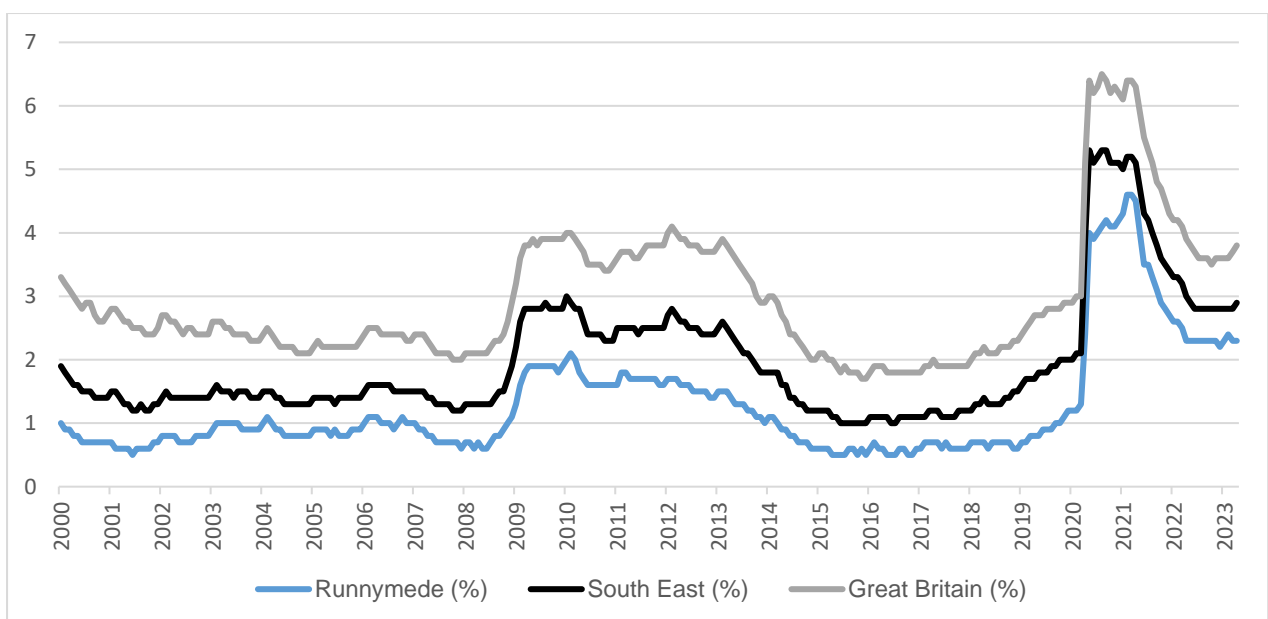
**Figure 8: Unemployment amongst 16–64 year olds (Jan 2004 - Dec 2022)**



Source: ONS Annual Population Survey 2004-2022

Similarly, the percentage of Runnymede residents claiming out-of-work benefits has remained lower than the regional and national averages since records began in 1990. As of April 2023, 2.3% of working aged adults in the borough claim some form of out-of-work benefit, compared to 2.9% across the South East and 3.8% across Great Britain. The number of claimants in Runnymede has halved from its peak of 4.6% in April 2021 amidst the COVID-19 pandemic, though the figure remains above pre-pandemic levels, as a reflection of the present economic climate. (Source: ONS Claimant Count)

**Figure 9: Out-of-work benefits claimants (16-64 year olds) (Jan 2000 - Apr 2023)**



Source: ONS Claimant Count by Sex and Age 2000-2023



## Employment by Industry and Occupation

Runnymede has a varied workforce employed in a range of industries. The largest sectors of employment for residents in the borough are in the 'Wholesale and retail trade; repair of motor vehicles and motorcycles', 'Human health and social work activities', and 'Education' categories, which matches regional and national trends. Relative to the population, the borough has a significantly above average number of employees working within the 'information and communication' sector, as well as the 'transport and storage' sector.

It should be noted that the below tables refer to the employment industries of Runnymede residents and not employees based in Runnymede. As explored later in this chapter, a large proportion of Runnymede residents do not work in the borough and a similar proportion of employees working in Runnymede do not reside in the borough. The role of the data below is therefore to give an insight into the resident population and should not be interpreted as the biggest employment sectors in Runnymede - of which an analysis can instead be found in Chapter 5.

**Table 4: Employment by Industry for Runnymede residents**

| <b>Occupation</b>  | <b>Runnymede<br/>(count and %)</b> |             | <b>South<br/>East (%)</b> | <b>England<br/>(%)</b> |
|--|------------------------------------|-------------|---------------------------|------------------------|
| Agriculture, Forestry and fishing                                    | <b>113</b>                         | <b>0.3</b>  | 0.6                       | 0.8                    |
| Mining and quarrying   | <b>135</b>                         | <b>0.3</b>  | 0.1                       | 0.2                    |
| Manufacturing  | <b>2271</b>                        | <b>5.3</b>  | 6                         | 7.3                    |
| Electricity, gas, steam and air conditioning supply                  | <b>257</b>                         | <b>0.6</b>  | 0.6                       | 0.6                    |
| Water supply; Sewerage, Waste management and Remediation activities  | <b>237</b>                         | <b>0.6</b>  | 0.7                       | 0.7                    |
| Construction   | <b>3607</b>                        | <b>8.5</b>  | 9                         | 8.7                    |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | <b>5722</b>                        | <b>13.5</b> | 13.9                      | 15                     |
| Transport and storage  | <b>2882</b>                        | <b>6.8</b>  | 4.9                       | 5                      |
| Accommodation and food service activities                            | <b>1905</b>                        | <b>4.5</b>  | 4.5                       | 4.9                    |
| Information and communication  | <b>3417</b>                        | <b>8</b>    | 6.2                       | 4.7                    |
| Financial and insurance activities                                   | <b>1455</b>                        | <b>3.4</b>  | 4.1                       | 3.8                    |
| Real estate activities   | <b>747</b>                         | <b>1.8</b>  | 1.6                       | 1.6                    |
| Professional, scientific and technical activities                    | <b>3020</b>                        | <b>7.1</b>  | 7.2                       | 6.7                    |
| Administrative and support service activities                        | <b>2536</b>                        | <b>6</b>    | 5.7                       | 5.3                    |

|   |             |             |      |      |
|---|-------------|-------------|------|------|
| Public administration and defence; compulsory social security | <b>2014</b> | <b>4.7</b>  | 5.9  | 5.8  |
| Education   | <b>4423</b> | <b>10.4</b> | 10.2 | 9.9  |
| Human health and social work activities                       | <b>5219</b> | <b>12.3</b> | 13.9 | 14.6 |
| Other   | <b>2502</b> | <b>5.9</b>  | 4.8  | 4.6  |

Source: Census 2021

The employment landscape of Runnymede residents has witnessed a degree of change in the decade between the 2011 and 2021 censuses, as Table 5 demonstrates. Sectors including health, construction, information and communication, and education have seen a notable increase in employment share, whilst others, including wholesale and retail trade, and transport and storage, have seen a fall in employment.

**Table 5: Growth in Employment Industries of Runnymede Residents between 2011 and 2021**

| <b>Occupation</b>  | <b>2011</b> | <b>2021</b> | <b>Percentage Change</b> |
|--|-------------|-------------|--------------------------|
| Agriculture, Forestry and fishing                                    | 0.27%       | 0.27%       | +0.00%                   |
| Mining and quarrying   | 0.39%       | 0.32%       | -0.08%                   |
| Manufacturing  | 5.97%       | 5.35%       | -0.62%                   |
| Electricity, gas, steam and air conditioning supply                  | 0.64%       | 0.61%       | -0.03%                   |
| Water supply; Sewerage, Waste management and Remediation activities  | 0.49%       | 0.56%       | +0.07%                   |
| Construction   | 7.17%       | 8.49%       | +1.32%                   |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 15.61%      | 13.48%      | -2.13%                   |
| Transport and storage  | 8.65%       | 6.79%       | -1.87%                   |
| Accommodation and food service activities                            | 5.25%       | 4.49%       | -0.77%                   |
| Information and communication  | 6.80%       | 8.05%       | +1.25%                   |
| Financial and insurance activities                                   | 3.34%       | 3.43%       | +0.09%                   |
| Real estate activities   | 1.44%       | 1.76%       | +0.32%                   |

|   |        |        |        |
|---|--------|--------|--------|
| Professional, scientific and technical activities             | 8.15%  | 7.11%  | -1.04% |
| Administrative and support service activities                 | 5.47%  | 5.97%  | +0.50% |
| Public administration and defence; compulsory social security | 4.69%  | 4.74%  | +0.06% |
| Education   | 9.32%  | 10.42% | +1.10% |
| Human health and social work activities                       | 10.29% | 12.29% | +2.00% |
| Other   | 6.07%  | 5.89%  | -0.17% |

Source: Census 2011 & Census 2021

When looking at occupation, Runnymede has a higher-than-average proportion of workers in managerial, professional, and administrative occupations, and a lower proportion of workers in other occupations. 53.4% of working Runnymede residents are employed in higher-level occupations, compared to 50.4% in the South East and 46.5% across England (Source: Census 2021). These occupations tend to require the highest level of skills, indicating that Runnymede has a highly skilled population.

**Table 6: Employment by Occupation**

| Occupation                                       | Runnymede<br>(count and %) |             | South<br>East (%) | England<br>(%) |
|--|----------------------------|-------------|-------------------|----------------|
| Managers, directors and senior officials         | <b>7,078</b>               | <b>16.7</b> | 14.9              | 12.9           |
| Professional occupations                         | <b>9,235</b>               | <b>21.8</b> | 21.2              | 20.3           |
| Associate professional and technical occupations | <b>6,344</b>               | <b>14.9</b> | 14.3              | 13.3           |
| Administrative and secretarial occupations       | <b>4,175</b>               | <b>9.8</b>  | 9.4               | 9.3            |
| Skilled trades occupations                       | <b>4,010</b>               | <b>9.4</b>  | 10.0              | 10.2           |
| Caring, leisure and other service occupations    | <b>3,716</b>               | <b>8.8</b>  | 9.1               | 9.3            |
| Sales and customer service occupations           | <b>2,756</b>               | <b>6.5</b>  | 6.8               | 7.5            |
| Process, plant and machine operatives            | <b>1,872</b>               | <b>4.4</b>  | 5.6               | 6.9            |
| Elementary occupations                           | <b>3,271</b>               | <b>7.7</b>  | 8.8               | 10.5           |

Source: Census 2021

## Qualifications and Skills

Skills enhance productivity and competitiveness and are linked with higher levels of innovation and workforce flexibility. High level skills are required to drive innovation and leadership within an economy and to enable businesses to compete globally. In terms of labour market performance and skills, there is a significant positive correlation between high-level graduate skills and the proportion of the workforce within knowledge-intensive industries.

Runnymede has a skilled population, with 35.3% of residents over sixteen being educated to Level 4 (degree level) or above, which is higher than the national average and broadly in line with the regional average (Source: Census 2021). The proportion of Runnymede residents educated to Level 3 (A-level) or above stands at 56.6%, well above the regional and national averages of 53.2% and 50.8% respectively. The borough has a below average proportion of residents without qualifications, at 14.5% This marks a significant decrease from the 2011 Census, where the figure stood at 18.3%, which is in line with national trends.

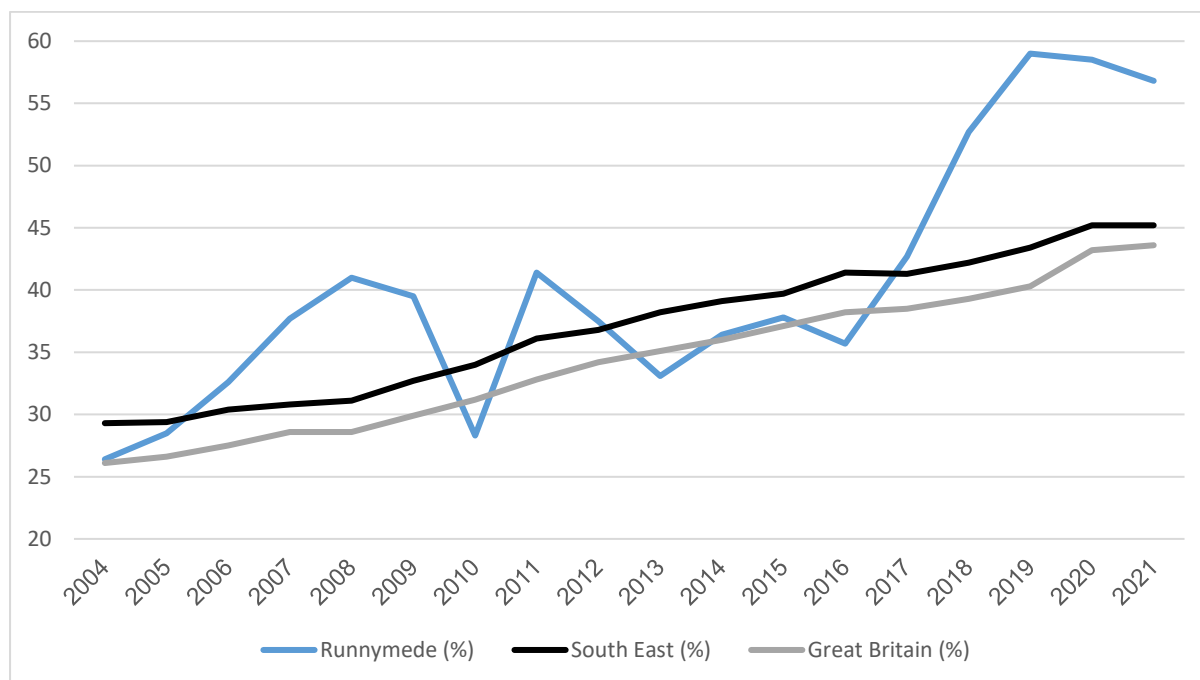
**Table 7: Highest qualifications for residents aged 16 and over**

| <b>Qualifications</b>                  | <b>Runnymede<br/>(count and %)</b> |             | <b>South<br/>East (%)</b> | <b>Great<br/>Britain (%)</b> |
|--|------------------------------------|-------------|---------------------------|------------------------------|
| No qualifications                      | <b>10,528</b>                      | <b>14.5</b> | 15.4                      | 18.1                         |
| Level 1 and entry level qualifications | <b>6,543</b>                       | <b>9</b>    | 9.8                       | 9.7                          |
| Level 2 qualifications                 | <b>9,130</b>                       | <b>12.6</b> | 13.9                      | 13.3                         |
| Apprenticeship                         | <b>3,400</b>                       | <b>4.7</b>  | 5.1                       | 5.3                          |
| Level 3 qualifications                 | <b>15,509</b>                      | <b>21.3</b> | 17.4                      | 16.9                         |
| Level 4 qualifications or above        | <b>25,643</b>                      | <b>35.3</b> | 35.8                      | 33.9                         |
| Other qualifications                   | <b>1,964</b>                       | <b>2.7</b>  | 2.7                       | 2.8                          |

Source: Census 2021

When narrowing this down to working aged adults (16-64) rather than all adults, the data shows that Runnymede has a significantly higher proportion of people educated to Level 4 (degree level) or above (56.8%) compared to the wider South East (48.2%) and Great Britain (43.6%) (Source: ONS Annual Population Survey 2021). As Figure 10 indicates, the borough has seen a significant rise in the proportion of working aged adults educated to Level 4 or above in recent years.

**Figure 10: Proportion of working aged adults educated to Level 4 or above**



Source: ONS Annual Population Survey 2004-2021

Note: Runnymede fluctuations are likely due to smaller sample sizes. No data is available for 2022.

There are five state funded academy secondary schools in the borough: Jubilee High School, Salesian School, Magna Carta School, Chertsey High School and Fullbrook School. In the 2021-2022 academic year, four of these five schools outperformed the English average in terms of the proportion of students who achieved a Grade 5 or above in their English and Maths GCSES (Source: Department for Education, Find school and college performance data in England, 2023).

In addition, there are four private schools, all with sixth form provision, including two international schools. Strodes College, Egham is primarily focussed on A-Level delivery. Egham is also home to Royal Holloway, University of London – which ranks in the top 30 universities in the UK (Source: The Times, Good University Guide, 2023).

The borough has made significant progress in advancing skills in recent years, providing new opportunities for economic growth. To maintain this, it must be made a priority to continue to increase high level skills and improve basic skills in order to lower the number of people in the borough without qualifications. Whilst Runnymede has a population that, on average, is more skilled when compared to national figures, small pockets of the borough continue to have low levels of attainment which require addressing. This is explored further in Chapter Six.

## Median Earnings

For full time workers, Runnymede records higher median earnings than both the South East and Great Britain, as indicated by Table 8. Figure 11 demonstrates that whilst average earnings in Runnymede have consistently remained above regional and national averages, the gap had narrowed significantly between the years of

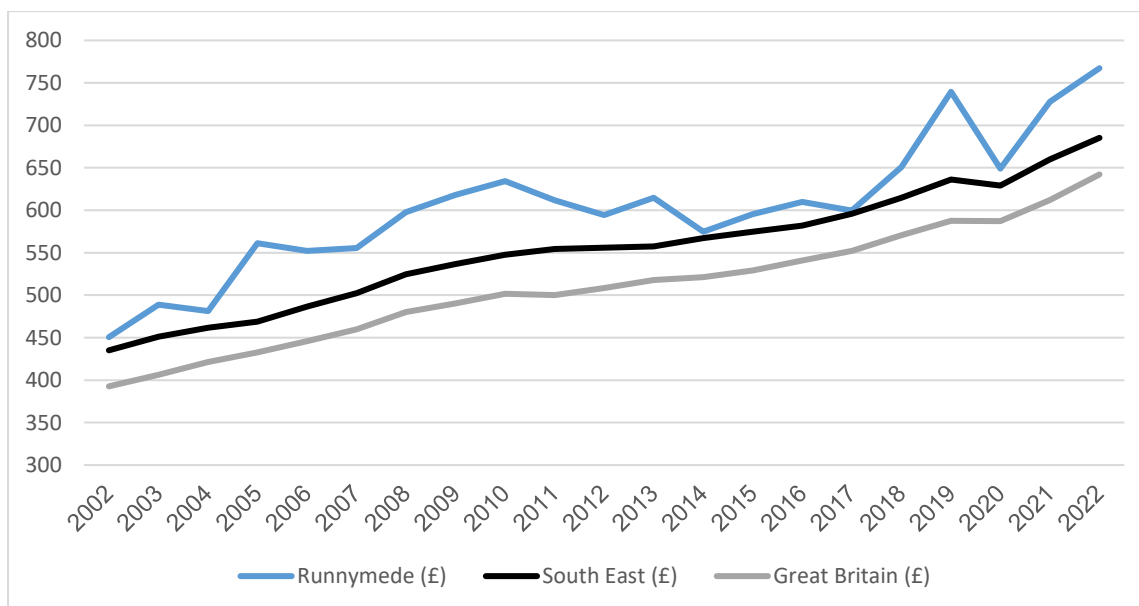
2010 and 2017 before increasing again in recent years. This is with the exception of 2020, where median earnings in Runnymede saw a much sharper downturn than that experienced at regional and national levels. Despite this, average earnings in Runnymede have recovered strongly since the COVID-19 pandemic, with the median full time employee in Runnymede having a gross weekly pay of £767.30 in 2022

**Table 8: Median Gross Weekly Pay by Place of Residence (Full time employees)**

|            | Runnymede (£) | South East (£) | Great Britain (£) |
|------------|---------------|----------------|-------------------|
| Male       | 829.8         | 735.4          | 687.5             |
| Female     | 674.9         | 610.7          | 584.5             |
| <b>All</b> | <b>767.3</b>  | <b>685.3</b>   | <b>642.2</b>      |

Source: ONS Annual Survey of Hours and Earnings 2022

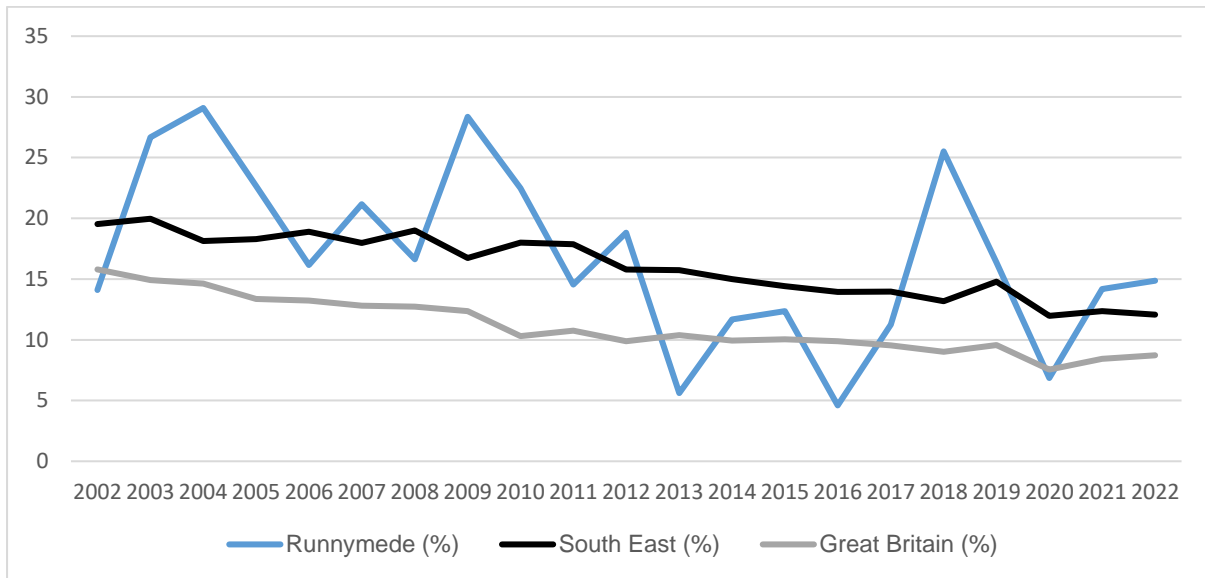
**Figure 11: Median Gross Weekly Pay by Place of Residence (Full time employees) (2004-2022)**



Source: ONS Annual Survey of Hours and Earnings 2004-2022

The figure below indicates the difference between male and female earnings in percentage terms. In 2022, men in Runnymede earned, on average, 14.9% more than women. This pay gap is considerably higher than the national average of 8.7%, and the regional average of 12.1% (Source: ONS Annual Survey of Hours and Earnings 2022). The significant fluctuations in the figures for Runnymede can be attributed to the smaller sample sizes for the borough. With the exception of 2018, which saw an abnormally high pay gap in Runnymede of 25.5% and is likely a statistical outlier, the pay gap in the borough appears to be on a downward trajectory and has been much closer to regional and national averages in the last decade than the decade preceding it. Nonetheless, the borough still has a significant way to go before pay equity is reached between men and women.

**Figure 12: Gender Pay Gap (Full Time Employees) (2004-2022)**



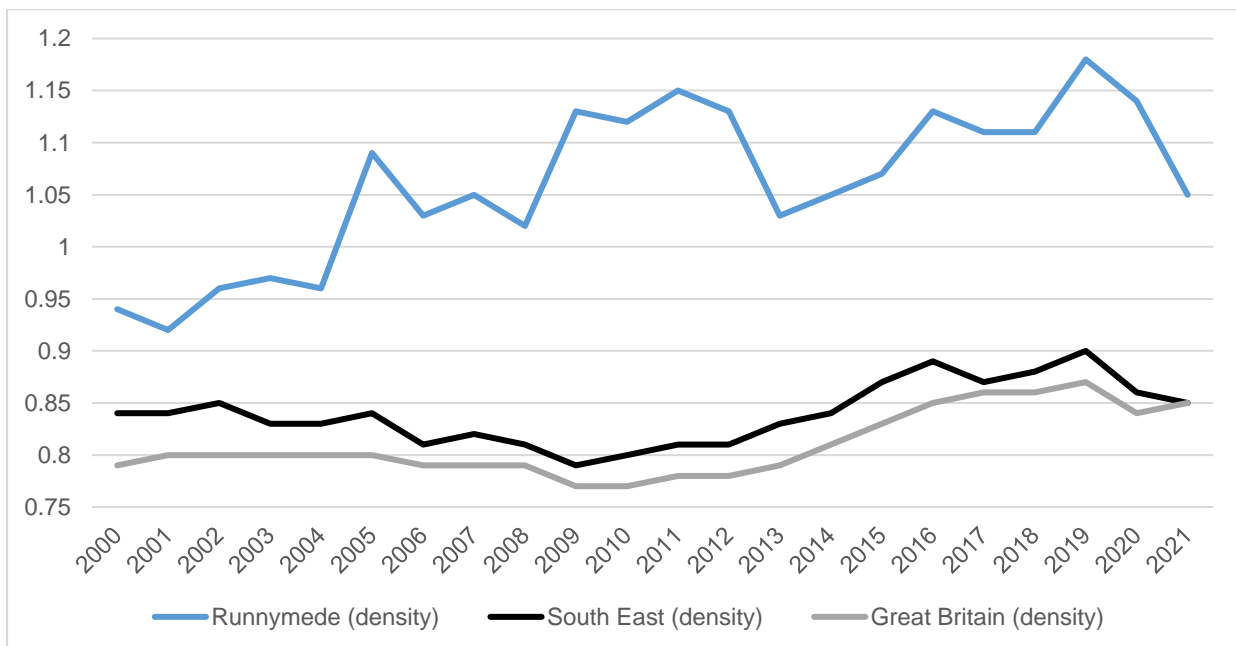
Source: ONS Annual Survey of Hours and Earnings 2004-2022

Note: The Gender Pay Gap is calculated using the ONS definition as the difference between average hourly earnings (excluding overtime) of men and women as a proportion of men's average hourly earnings (excluding overtime)

## Job Density

Runnymede has a high proportion of jobs based in the borough relative to the number of working age residents. In 2021, 1.05 jobs existed in Runnymede per each working age resident. This is significantly higher than the job density of 0.85 seen at a regional and national level (Source: ONS Jobs Density 2021). Figure 13 indicates that Runnymede has long enjoyed a job density that is significantly above regional and national levels.

**Figure 13: Job Density (2000-2021)**



Source: ONS Jobs Density

Whilst the borough was one of just a few areas in the country to witness an increase in job density at the height of the 2008-2010 recession, the COVID-19 pandemic and the subsequent economic downturn have led to a notable decrease in job density in the borough. Nonetheless, Runnymede remains the borough with the highest job density in Surrey.

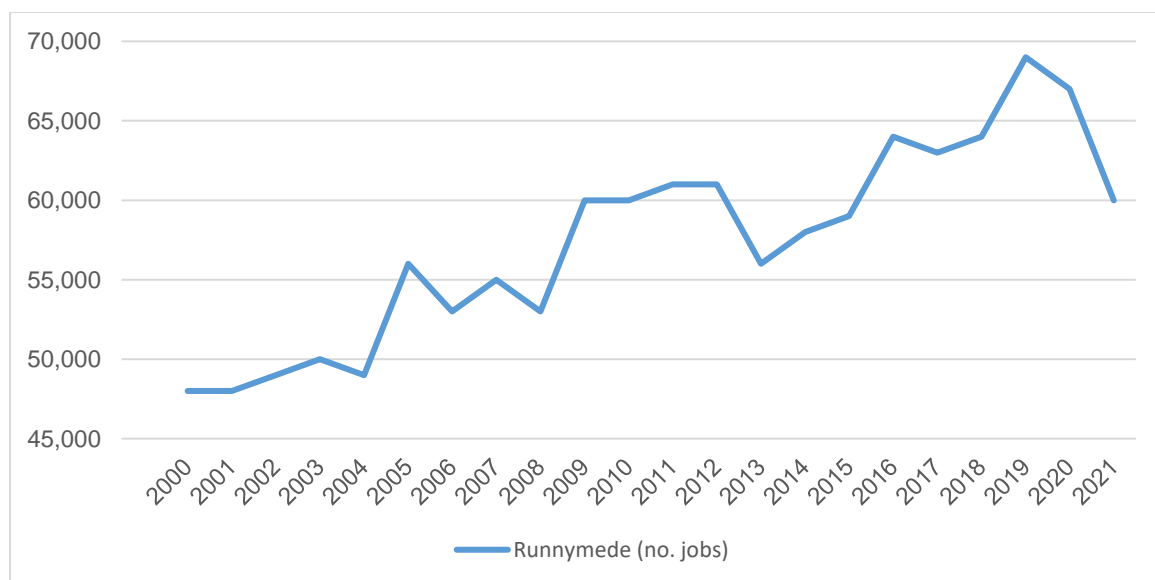
Runnymede's high job density can be attributed to its relatively small population in comparison to the volume of businesses in the borough, as well as Runnymede, historically, having more workers travelling into the borough than out of the borough on a typical working day. The recent fall in job density may therefore be attributable to the rise of homeworking, given fewer people are now commuting into the borough for work.

## Workforce Jobs

In 2021, approximately 60,000 jobs existed within Runnymede. As Figure 14 indicates, the borough has seen a gradual rise in the number of jobs over the last twenty years. The number of jobs in Runnymede peaked at 69,000 in 2019, though has since fallen in the aftermath of the COVID-19 pandemic.

Whilst the borough retains a job density figure significantly higher than regional and national averages, the number of jobs in the borough should be closely monitored over the coming years to determine whether this decrease is due to short term economic factors or larger modal shifts as a result of increased home working, which is likely to have a larger impact in the borough than other areas due to it having a net inflow of workers prior to the pandemic.

**Figure 14: Estimated Number of Jobs in Runnymede (2000 to 2021)**



Source: ONS Jobs Density

Note: Total jobs includes employees, self-employed, government-supported trainees and HM Forces



## Commuting

Historically, Runnymede has had a net inflow of workers into the borough on a daily basis. In 2011, 30,672 people commuted into Runnymede from other local authorities daily, whilst 21,460 people commuted out of Runnymede daily, meaning the borough had an overall net inflow of 9,212 people (Source: Census 2011).

The small size of local authority districts in the area means there has historically been a high level of cross-boundary commuting flows. In 2011, only 43% of Runnymede residents worked in the borough, which is similar to neighbouring authorities such as Elmbridge (43%), Spelthorne (39%), and Woking (47%) (Source: Census 2011). The inflow of workers into Runnymede, as well as the outflow of the commuters, is primarily from and to Runnymede's neighbouring authorities, as well to London – which was the workplace of 24% of working-aged Runnymede residents in 2011.

It must be noted that work patterns have changed dramatically since 2011, particularly since the COVID-19 pandemic, and it is unknown if Runnymede continues to have a net inflow of workers as of 2023. At the time of publication, data on commuter flows from Census 2021 is yet to be released, although the unique circumstances surrounding the census being conducted in a period of national lockdown means that this data cannot be interpreted as being representative of current commuting trends.

It is however known that 38.9% of Runnymede residents worked mainly from home during the week before Census 2021, which compares to a figure of 35.8% in the South East, and 31.5% across England (Source: Census 2021). Table 9 provides a further breakdown of mode of travel to work, though once again this data should not be considered as indicative of current trends due to the circumstances in which the census was conducted.

**Table 9: Mode of Travel to Work**

|                                      | Runnymede<br>(count and %) |             | South<br>East (%) | England<br>(%) |
|--------------------------------------|----------------------------|-------------|-------------------|----------------|
| Work mainly at or from home          | <b>16,530</b>              | <b>38.9</b> | 35.8              | 31.5           |
| Underground, metro, light rail, tram | <b>122</b>                 | <b>0.3</b>  | 0.2               | 1.9            |
| Train                                | <b>1,142</b>               | <b>2.7</b>  | 2.2               | 2              |
| Bus, minibus or coach                | <b>492</b>                 | <b>1.2</b>  | 2.5               | 4.3            |
| Taxi                                 | <b>183</b>                 | <b>0.4</b>  | 0.5               | 0.7            |
| Motorcycle, scooter or moped         | <b>230</b>                 | <b>0.5</b>  | 0.5               | 0.5            |
| Driving a car or van                 | <b>18,611</b>              | <b>43.8</b> | 44.2              | 44.5           |

|                                |              |            |     |     |
|--------------------------------|--------------|------------|-----|-----|
| Passenger in a car or van      | <b>1,267</b> | <b>3</b>   | 3.5 | 3.9 |
| Bicycle                        | <b>705</b>   | <b>1.7</b> | 1.9 | 2.1 |
| On foot                        | <b>2,759</b> | <b>6.5</b> | 7.6 | 7.6 |
| Other method of travel to work | <b>417</b>   | <b>1</b>   | 1   | 1   |

Source: Census 2021

## Analysis and Summary

Runnymede has a highly skilled economy, with high levels of participation in the workforce, high job density, and unemployment levels consistently below regional and national averages.

The demand for skills will continue to increase and change in the future, driven by factors such as automation as well as the growing significance of the green and digital economies. To remain competitive, the borough must expand its focus on skills, particularly amongst schools, colleges, and skills providers, which should aim to align skills provision to employer demands.

Skills levels in Runnymede continue to be above the national average for most indicators. The borough has made significant progress in reducing the proportion of residents with no qualifications in the last decade, although targeted interventions aimed at improving skills levels for those most in need should continue to take place in order to ensure that all residents are able to achieve their best outcomes.

It is also increasingly evident that many of the changes to working habits that arose from the COVID-19 pandemic have now become permanent. Increased working from home has fundamentally reshaped commuting habits, which may have significant implications for areas such as Runnymede which previously had a net inflow of commuters daily. In the coming years, close attention should be paid to indicators such as the number of jobs in the borough to ascertain the long-term impacts of these trends, which currently remain unclear.

# Chapter 4: Economic Competitiveness

Economic competitiveness is one of the most important factors that provides an insight into the strength and stability of local economies. Numerous studies of the UK economy have been conducted in recent years which use a variety of indicators to rank the competitiveness of regions and boroughs. This chapter summarises the assessment of Runnymede’s economic competitiveness from the leading indices for measuring competitiveness.

## What is Economic Competitiveness?

*“Competitiveness is considered to consist of the capability of an area to attract and maintain firms with stable or rising market shares in an activity, while maintaining stable or increasing standards of living for those who participate in it.”*

- UK Competitiveness Index 2023

## UK Competitiveness Index 2023

The UK Competitiveness Index, compiled by Cardiff University and Nottingham Business School, is a leading study that ranks the economic competitiveness of areas across the UK. The index combines statistics on factors including economic activity, business start-up rates, skill levels, GVA per head, productivity, and gross weekly pay to produce a ranking of 362 local authority areas across the United Kingdom from the most to the least competitive.

**Table 10: Top Ten Most Competitive UK Local Authority Areas (UKCI, 2023)**

| Rank | Local Authority        | Region |
|------|------------------------|--------|
| 1    | City of London         | London |
| 2    | Westminster            | London |
| 3    | Camden                 | London |
| 4    | Islington              | London |
| 5    | Tower Hamlets          | London |
| 6    | Hammersmith and Fulham | London |
| 7    | Kensington and Chelsea | London |

|    |                  |                   |
|----|------------------|-------------------|
| 8  | Hackney          | London            |
| 9  | <b>Runnymede</b> | <b>South East</b> |
| 10 | Southwark        | London            |

Source: UK Competitiveness Index 2023

As Table 10 indicates, Runnymede ranks as the 9<sup>th</sup> most competitive area of the United Kingdom and is the only area in the top ten located outside of London. This makes Runnymede the most competitive borough in the country outside of London. This is unchanged from 2021 edition of the UK Competitiveness Index, where the borough maintained the same rank.

The report singles out Runnymede as the one exception to the dominance of London in the higher end of the competitiveness rankings, attributing the borough's success to it being centred around high-tech sectors and having a large service-based economy (Source: UKCI 2023).

The wider area surrounding Runnymede is also highly competitive, contributing to the region's status as an attractive business location. All five of Runnymede's five neighbouring boroughs are in the 20% most competitive areas in the UK, with Elmbridge ranking 11<sup>th</sup>, Windsor and Maidenhead 14<sup>th</sup>, Surrey Heath 27<sup>th</sup>, Woking 37<sup>th</sup>, and Spelthorne 66<sup>th</sup> (Source: UKCI 2023).

In addition, Runnymede sits within the Enterprise M3 (EM3) Local Enterprise Partnership (LEP), which is the third most competitive LEP area in the UK (Source: UKCI 2023). Runnymede is the most competitive district within the LEP.

## Gross Value Added (GVA)

Whilst Runnymede's high ranking is attributable to a combination of factors, the borough's high Gross Value Added (GVA) is a major contributor to the borough's high ranking in competitiveness indices. GVA is the value generated by any unit engaged in the production of goods and services and is often used to measure the contribution of an area to the economy.

Runnymede has an extremely high total GVA relative to its small population. In 2021, this stood at £7.219 billion. Out of 64 local authority areas in the South East, Despite being the 4<sup>th</sup> smallest in terms of population, Runnymede has the 9<sup>th</sup> highest total GVA out of these areas (Source: ONS, Regional gross value added (balanced) by industry: local authorities by ITL1 region). Runnymede's high GVA can be attributed to the high proportion of national and international headquarters that are located within the borough, which generate a significant proportion of the area's economic output. Table 11 compares Runnymede's GVA to other Surrey Boroughs, highlighting that the borough has the highest GVA in Surrey.

**Table 11: Gross Value Added (GVA) of Surrey Boroughs (2021)**

| <b>Rank</b> | <b>Borough</b>       | <b>Gross Value Added (£ billion)</b> |
|-------------|----------------------|--------------------------------------|
| 1           | Runnymede            | £7.219                               |
| 2           | Elmbridge            | £6.884                               |
| 3           | Reigate and Banstead | £6.092                               |
| 4           | Guildford            | £5.949                               |
| 5           | Surrey Heath         | £4.016                               |
| 6           | Mole Valley          | £4.007                               |
| 7           | Spelthorne           | £3.685                               |
| 8           | Waverley             | £3.543                               |
| 9           | Woking               | £3.234                               |
| 10          | Tandridge            | £1.887                               |
| 11          | Epsom and Ewell      | £1.805                               |

*Source: ONS, Regional gross value added (balanced) by industry: local authorities by ITL1 region, 2021*

When looking at GVA per hour worked, Runnymede has a figure of £65.01 according to the latest available data (2020) (Source: ONS, Subregional productivity: labour productivity indices). This is the 5<sup>th</sup> highest figure out of 377 local authority districts in the UK.

Data on GVA per head is no longer published at local authority level, although when this was last published in 2017, the borough had the 8<sup>th</sup> highest GVA per head out of any area in the United Kingdom and had the highest figure of any area outside of London (Source: ONS, Regional gross value added (balanced) by local authority in the UK, 2017).

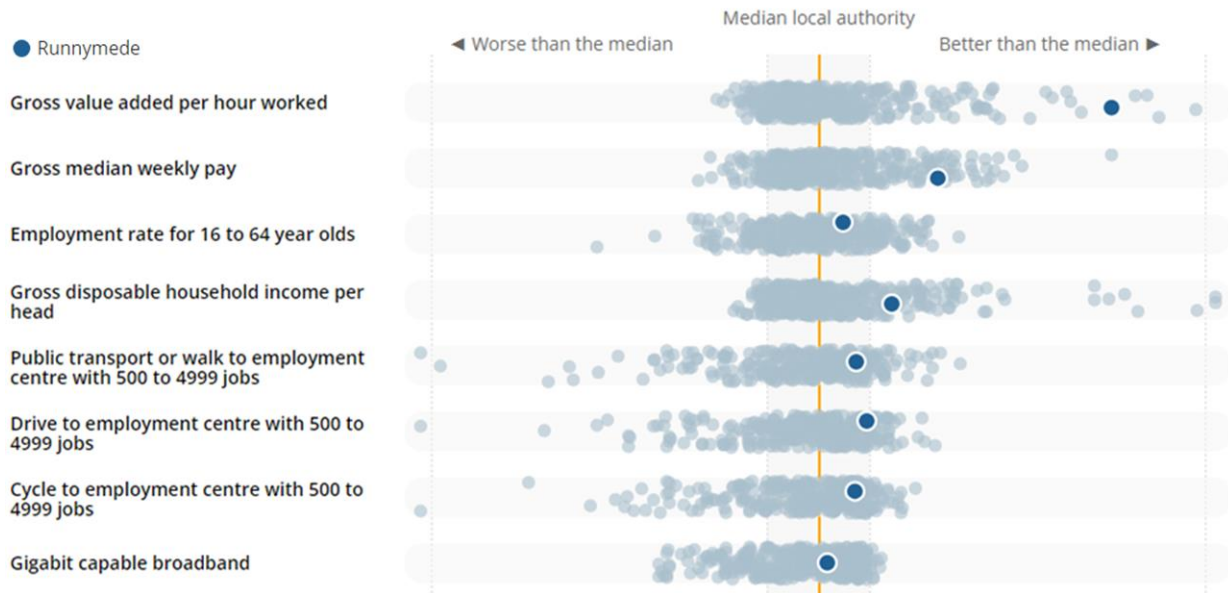
The UK Competitiveness Index 2023 projects that Runnymede will have the 13<sup>th</sup> highest long-run GVA growth out of 360 areas, demonstrating the area's continued potential for growth (Source: UKCI 2023).

Runnymede's high GVA can be attributed to the high proportion of national and international headquarters that are located within the borough, which generate a significant proportion of the area's economic output.

## Alternative Competitiveness Indicators

The below figure indicates Runnymede’s ranking for a number of commonly used indicators for competitiveness in comparison to other UK local authorities.

**Figure 15: Comparison of Runnymede to other local authorities for common competitiveness indicators**



Source: ONS Subnational Indicators Explorer

As Figure 15 shows, Runnymede ranks higher than the median local authority for all eight of these indicators. These, alongside Runnymede’s strategic location, provision of high-quality offices and highly skilled workforce make it a highly attractive location for foreign companies wanting to set up UK and global headquarters and contribute to its competitive status.

Improving access to gigabit capable broadband should be considered a key priority area for the borough. Access to fast, reliable broadband is vital to ensure the economic competitiveness of the area as it is directly linked to increased productivity and economic growth. Whilst the borough is presently marginally above the median local authority for access to this, it should strive to further improve digital connectivity to retain its competitiveness in an increasingly digital economy.

## **Analysis and Summary**

Runnymede's high GVA, combined with its low unemployment, high participation in the workforce, high levels of skills, and its high number of businesses relative to its size, makes the borough one of the most economically competitive parts of the country.

For Runnymede to maintain its competitive status, retaining and expanding the presence of international businesses should remain a priority for the borough – particularly given their significant contribution to the area's GVA. Knowing and understanding the issues, barriers and opportunities for the growth and retention of large companies must be a key priority. The Council should continue to work with partners such as Surrey County Council and the Enterprise M3 Local Enterprise Partnership to support continued inward investment and business retention.

This is particularly relevant for businesses that exist in Runnymede's key employment sectors: information and communication; cyber security; and arts, entertainment, and recreation. Improving digital infrastructure and working with partners such as Royal Holloway, University of London is key to maximising the potential for continued growth within these key employment sectors, and the wider local economy, to retain Runnymede's highly competitive status.

# Chapter 5: Business and Enterprise

A strong and diverse business base, coupled with a healthy culture of enterprise and entrepreneurship, are key elements of a successful economy. This chapter examines the business demographics of Runnymede, its sectoral strengths and the principal economic challenges faced.

There were 4,365 businesses in Runnymede in 2022. Nine out of 10 businesses in Runnymede are micro businesses employing 0-9 people. The borough has a considerably higher share of medium and large businesses (businesses that employ over 50 people) than regional or national averages (Source: ONS UK Business Count, 2022).

**Table 12: Number of businesses by size**

|                    | Runnymede<br>(count and %) |             | South<br>East (%) | Great<br>Britain (%) |
|--------------------|----------------------------|-------------|-------------------|----------------------|
| Micro (0 To 9)     | <b>3,945</b>               | <b>90.4</b> | 90.0              | 89.4                 |
| Small (10 To 49)   | <b>305</b>                 | <b>7.0</b>  | 8.2               | 8.6                  |
| Medium (50 To 249) | <b>80</b>                  | <b>1.8</b>  | 1.4               | 1.5                  |
| Large (250+)       | <b>35</b>                  | <b>0.8</b>  | 0.4               | 0.4                  |
| Total              | <b>4,365</b>               |             |                   |                      |

Source: ONS UK Business Count 2022

Whilst accounting for only 7.4% of Surrey’s population, Runnymede is home to 13.2% of large businesses in Surrey, with the borough being an established location for the headquarters of many large companies (Source ONS UK Business Count, 2022). Examples of large enterprises and institutions in the borough include several household names, organisations, and global groups:

|                                      |                                 |
|--------------------------------------|---------------------------------|
| Gartner                              | VM Ware                         |
| Thorpe Park                          | Crest Nicholson                 |
| Samsung                              | Enterprise Rent-a-Car           |
| Bupa                                 | Toshiba                         |
| Animal and Plant Health Agency       | HCL Technologies                |
| Royal Holloway, University of London | St Peters and Ashford NHS Trust |
| Astellas Pharma                      | Future Electronics              |
| Belron                               | Kerry Foods                     |



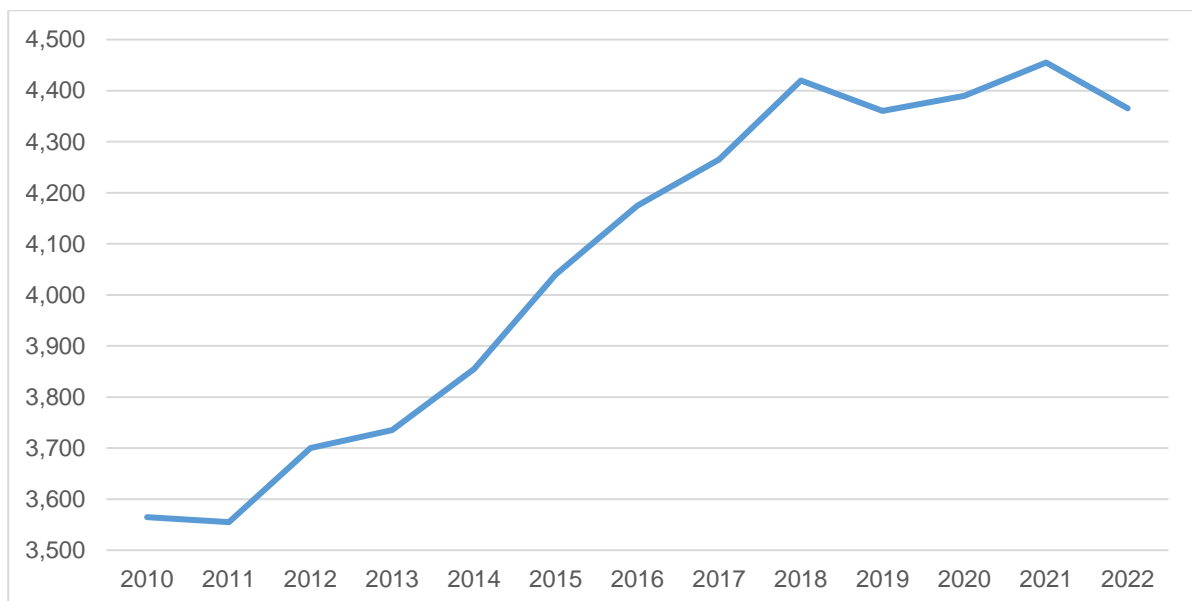
When considering data on large enterprises in finer detail, the borough has approximately 10 businesses employing 250-499 people, 10 businesses employing 500-999 people, and 15 businesses employing over 1000 people (Source: ONS UK Business Count, 2022). These figures are rounded to the nearest five by the ONS to avoid disclosing individual businesses. Whilst this makes it difficult to ascertain specific growth in the number of large businesses in the borough, it is known that the number of large businesses in Runnymede has remained largely consistent in the last decade, remaining between 35 and 45 businesses.

The volume of large businesses is a major strength of Runnymede and is a clear vindication of the borough's status as an attractive and well-connected destination for global business. It does however mean that a significant part of the local economy is reliant on the investment decisions of a small number of very large businesses. Despite major economic uncertainty in recent years however, including the COVID-19 pandemic and the UK's departure from the European Union, the number of large businesses in the borough has remained consistent and has largely been unaffected by economic shocks. Understanding the needs, requirements, and ambitions of these large enterprises in the borough should remain a key priority for the Council in order to maintain their continued presence in the area.

## Growth in the number of businesses

As Figure 16 indicates, the number of businesses in Runnymede experienced significant growth between 2011 and 2018 before plateauing slightly in recent years. Nonetheless, 800 more businesses existed in Runnymede in 2022 when compared to 2010. This represents a growth rate of 22.4%, which compares to 24.9% across the South East and 32.4% across Great Britain for the same period. It should be noted that Runnymede has long had a high number of businesses relative to its population which may explain its smaller growth rate.

**Figure 16: Number of enterprises in Runnymede (2010-2022)**

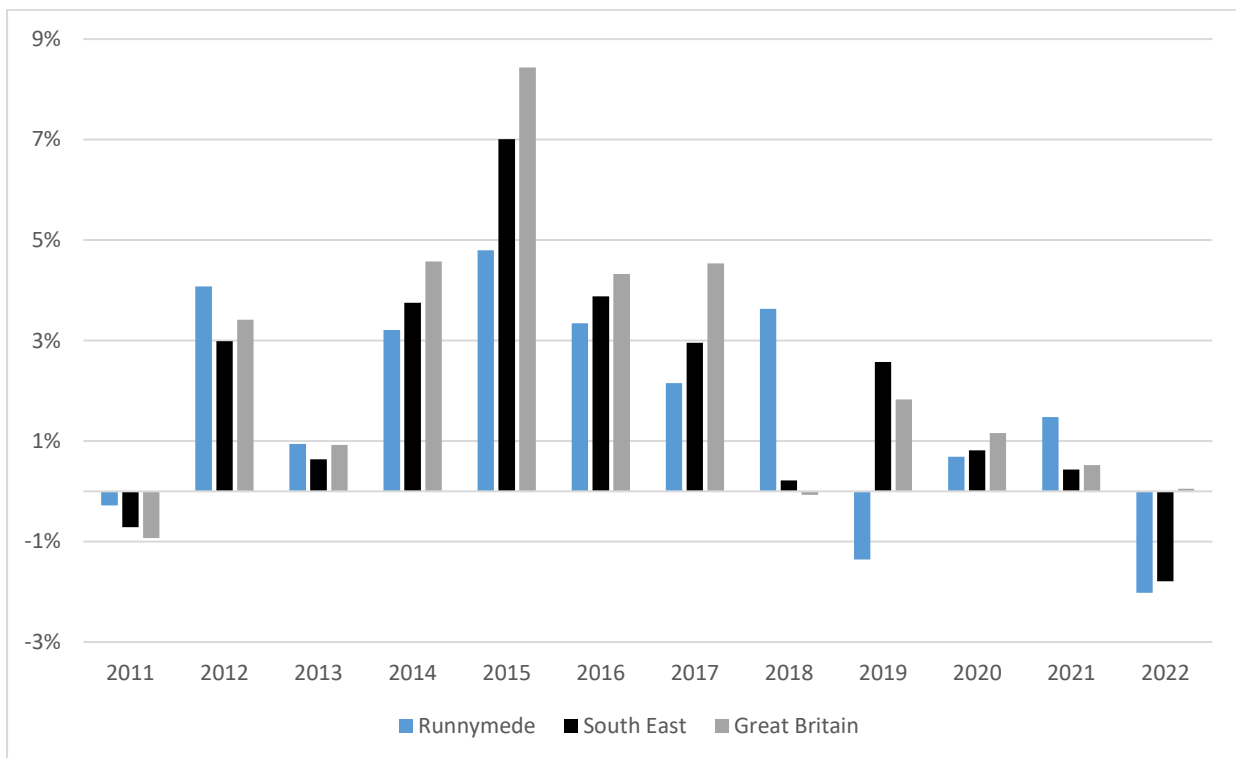


Source: ONS UK Business Count 2010-2022

Figure 17 compares the year-on-year percentage change in the number of businesses. 2022 saw a 2.0% fall in the number of Runnymede businesses compared to the previous year, which is the largest fall recorded since the ONS began gathering this data in 2010. Whilst this is notable, it is broadly in line with the regional average of -1.7% for the same period and is softened by the borough seeing a 1.5% rise in businesses between 2020 and 2021, which was significantly above the national average of 0.5%. Given the present economic climate, this statistic should be closely monitored in the coming years.

It should also be noted that some of the growth in new enterprises is due to a shift in employment from PAYE to self-employment. Given that Runnymede continues to have a significantly above average density of jobs, this makes the reduced rise in the business stock compared to the rest of the UK less concerning as it is evident that the borough continues to have an abundance of employment opportunities.

**Figure 17: Percentage change in the number of businesses 2011-2022 (compared to previous year)**



Source: ONS UK Business Count 2010-2022

## Business Survival

Businesses in Runnymede have a strong survival rate. Tables 13 and 14 chart the most recent data for the survival rates of businesses up to five years (for businesses formed in 2016) and three years (for businesses formed in 2018). Naturally, the figures vary based on the year of birth observed due to economic circumstances.

**Table 13: Business Survival Rates (based on businesses established in 2016)**

|                      | <b>2016 Births</b> | <b>1-year survival %</b> | <b>2-year survival %</b> | <b>3-year survival %</b> | <b>4-year survival %</b> | <b>5-year survival %</b> |
|----------------------|--------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Runnymede</b>     | 585                | 94.9                     | 71.8                     | 55.6                     | 47.9                     | 41.9                     |
| <b>Surrey</b>        | 8,275              | 95.8                     | 76.8                     | 61.6                     | 52.3                     | 44.7                     |
| <b>South East</b>    | 53,875             | 95                       | 75.5                     | 60                       | 50.5                     | 43.2                     |
| <b>Great Britain</b> | 391,875            | 95.3                     | 71.1                     | 54                       | 44.8                     | 38.2                     |

Source: ONS Business Demography

**Table 14: Business Survival Rates (based on businesses established in 2018)**

|                      | <b>2018 Births</b> | <b>1-year survival %</b> | <b>2-year survival %</b> | <b>3-year survival %</b> | <b>4-year survival %</b> | <b>5-year survival %</b> |
|----------------------|--------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Runnymede</b>     | 515                | 97.1                     | 78.6                     | 64.1                     | To be Published          |                          |
| <b>Surrey</b>        | 7245               | 95.7                     | 78.4                     | 62.8                     |                          |                          |
| <b>South East</b>    | 49540              | 95.3                     | 76.9                     | 60.6                     |                          |                          |
| <b>Great Britain</b> | 343085             | 94.8                     | 74.2                     | 57.5                     |                          |                          |

Source: ONS Business Demography

The tables indicate that 41.9% of businesses established in Runnymede in 2016 were still trading in 2021, which is above the national average but slightly below regional averages. However, business survival rates in the borough had improved significantly for businesses formed in Runnymede in 2018, with 64.1% still trading after three years – which is above county, regional and national averages and is a major improvement on the three-year survival rate of 55.6% for businesses formed in Runnymede in 2016. Business survival rates in Runnymede between these two time periods improved at a much greater rate than in the rest of the country.

## Key Industries

Runnymede has a largely service-sector based labour market, dominated by high levels of employment in high-skilled professional sectors. Table 15 lists the share of employees working in each industry. Unlike Table 4, the figures for Runnymede are based on jobs which are located in the borough rather than for the resident population, meaning this includes employees who commute into the borough. As such, this table gives an insight into the borough's key employment sectors.

**Table 15: Employment by Industry**

| Industry                                   | Runnymede<br>(count and %) |             | Surrey<br>% | South<br>East<br>% | Great<br>Britain<br>% |
|--|----------------------------|-------------|-------------|--------------------|-----------------------|
| Agriculture, forestry & fishing (A)        | 75                         | <b>0.1</b>  | 0.4         | 1.0                | 0.7                   |
| Mining, quarrying & utilities (B, D and E) | 600                        | <b>1.0</b>  | 1.1         | 1.3                | 1.3                   |
| Manufacturing (C)                          | 1,500                      | <b>2.6</b>  | 4.1         | 5.9                | 7.6                   |
| Construction (F)                           | 3,000                      | <b>5.2</b>  | 6.4         | 7.4                | 4.9                   |
| Motor trades (G1)                          | 900                        | <b>1.6</b>  | 1.8         | 2.0                | 1.7                   |
| Wholesale (G2)                             | 3,000                      | <b>5.2</b>  | 3.7         | 3.6                | 3.5                   |
| Retail (G3)                                | 2,500                      | <b>4.3</b>  | 8.7         | 10.7               | 9.2                   |
| Transport & storage (inc postal) (H)       | 2,000                      | <b>3.4</b>  | 3.4         | 6.4                | 5.0                   |
| Accommodation & food services (I)          | 4,000                      | <b>6.9</b>  | 6.9         | 7.4                | 7.5                   |
| Information & communication (J)            | 7,000                      | <b>12.1</b> | 6.4         | 2.8                | 4.4                   |
| Financial & insurance (K)                  | 1,750                      | <b>3.0</b>  | 3.9         | 2.5                | 3.6                   |
| Property (L)                               | 800                        | <b>1.4</b>  | 1.8         | 1.6                | 1.8                   |

|  |       |             |      |      |      |
|--|-------|-------------|------|------|------|
| Professional, scientific & technical (M)       | 7,000 | <b>12.1</b> | 11.9 | 7.0  | 8.9  |
| Business administration & support services (N) | 4,500 | <b>7.8</b>  | 8.9  | 8.8  | 8.9  |
| Public administration & defence (O)            | 700   | <b>1.2</b>  | 2.3  | 3.9  | 4.6  |
| Education (P)                                  | 6,000 | 10.3        | 9.4  | 9.4  | 8.7  |
| Health (Q)                                     | 9,000 | 15.5        | 13.7 | 13.9 | 13.6 |
| Arts, entertainment and recreation (R)         | 2,500 | 4.3         | 3.2  | 2.2  | 2.3  |
| Other Services (S,T and U)                     | 1,000 | 1.7         | 2.8  | 1.9  | 1.9  |

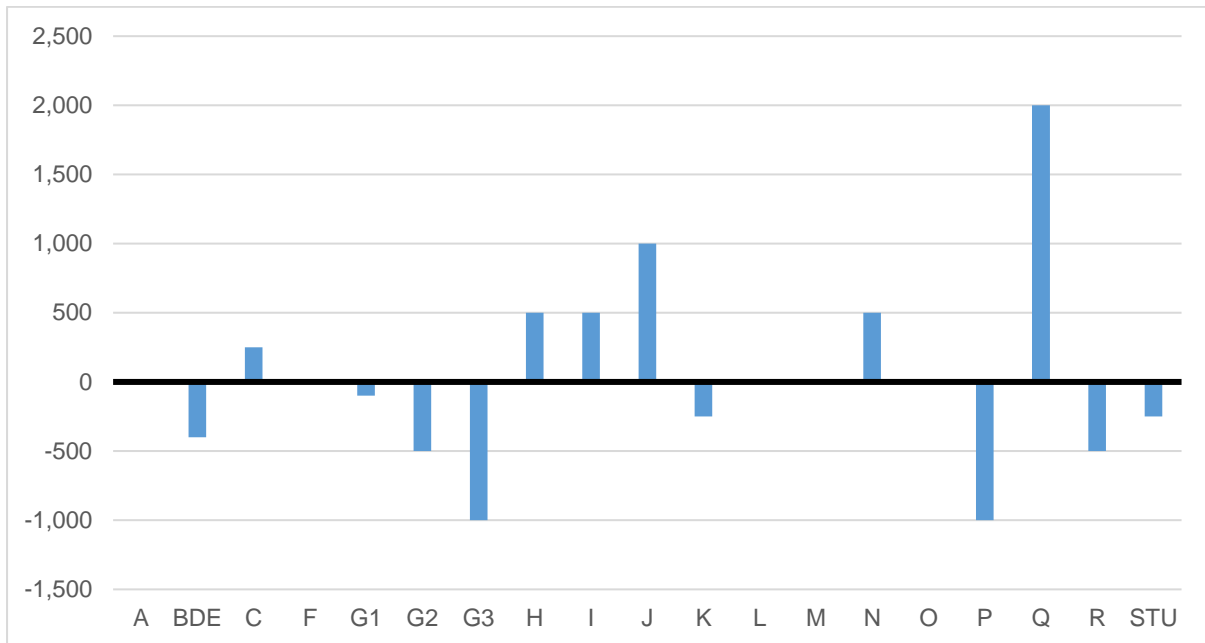
Source: ONS, Business Register and Employment Survey 2021

Compared to national averages, Runnymede has much higher shares of employment in information and communication; professional, scientific, and technical industries; and arts, entertainment, and recreation. Conversely, the borough has much lower shares of employment within the manufacturing and retail sectors.

Of all 363 lower-tier authority areas across Great Britain, Runnymede has the 12th highest share of information and communication employment and the 15th highest share of arts, entertainment, and recreation employment nationally. By contrast, the borough has the 3<sup>rd</sup> lowest share of retail employment and the 32<sup>nd</sup> smallest proportion of manufacturing employees (Source: ONS, Business Register and Employment Survey 2021).

Figure 18 maps the changes in the estimated number of Runnymede employees in each industry between 2018 and 2021. Despite the COVID-19 pandemic, the overall number of employees grew slightly from 57,325 to 58,075. The health industry saw the largest increase in employees during this period, with a net increase of 2,000 employees. The information and communication sector also experienced significant growth, increasing by 1,000 employees and cementing its position as a key industry for the borough. A number of industries saw a fall in employment, with this being the most pronounced amongst the retail and education sectors.

**Figure 18: Change in number of Runnymede employees per industry from 2018-2021**



Source: ONS, Business Register and Employment Survey, 2018 and 2021  
 Note: See Table 15 for Industry names

## Innovation

Runnymede has a range of institutions and businesses that place it on the cutting edge of research and innovation. This pushes the borough towards being a highly driven knowledge-based economy, a key ingredient for continued economic growth. The borough’s innovative status was recognised in Grant Thornton’s Sustainable Growth Index, where Runnymede ranked 2<sup>nd</sup> in the UK for dynamism and opportunity (Source: Grant Thornton, Sustainable Growth Index, 2019).

Runnymede is home to several leading research establishments, including the UK Government’s Animal and Health Plant Agency. Royal Holloway, University of London is also based in the borough. The university, which has over 12,000 students, prides itself on its academic research, with it being ranked as the 15<sup>th</sup> best university in the UK for the quality of its research output (Source: Times Higher Education Rankings, 2022). Royal Holloway, University of London is world-leading for its Cyber Security research and is classed as a UK Academic Centre of Excellence for this field.

The borough is also home to the UK and European headquarters of a number of world-renowned technology companies that are at the forefront of innovation including Samsung, Toshiba, Gartner, and VMWare.

Significant growth within the creative technologies field has also been witnessed in Runnymede in recent years. Royal Holloway, University of London has invested substantially into their StoryFutures hub, which is the UK’s national centre for immersive technology. Moreover, Netflix has recently committed to a long-term investment in Longcross Studios in the borough, which is set to see a major expansion in media production in coming years

## **Analysis and Summary**

The data shows that Runnymede continues to be an attractive location for businesses of all sizes, boasting strong business survival rates and a continued presence of leading, multi-national businesses based in the borough.

Whilst the present economic climate means that the change in the number of total enterprises in the borough should be closely monitored in the coming years, Runnymede shows continued strength insofar that its key industries are within highly skilled professional sectors and have largely witnessed growth in recent years.

The borough's thriving information and communications sector, which relative to Runnymede's size is one of the largest in the country, is undoubtedly a major driver of the high level of innovation seen within the borough. As the UK continues to see a shift towards a knowledge-based economy, Runnymede is well placed to harness the economic benefits of this, with the borough establishing itself as a hub for innovation in the region - strengthened by significant investment in recent years in both the public and private sectors.

# Chapter 6: Deprivation in Runnymede

## Overview

Runnymede can generally be considered an affluent borough. In 2019, the borough was ranked as the 61<sup>st</sup> least deprived out of the 317 local authority areas in England, placing it in the most affluent 20%. This is a fall from the 2015 figure, where the borough was ranked as the 46<sup>th</sup> least deprived. (Source: Index of Multiple Deprivation 2015 and 2019).

Despite the borough's affluence compared to England overall, Runnymede is the second most deprived borough in Surrey, as indicated by the table below.

**Table 16: Index of Multiple Deprivation across Surrey Local Authorities**

| Local authority district/borough | Index rank within Surrey (out of 11) | Index rank across England (out of 317) |
|----------------------------------|--------------------------------------|--|
| Spelthorne                       | 1 <sup>st</sup>                      | 201 <sup>st</sup>                      |
| <b>Runnymede</b>                 | <b>2<sup>nd</sup></b>                | <b>256<sup>th</sup></b>                |
| Tandridge                        | 3 <sup>rd</sup>                      | 258 <sup>th</sup>                      |
| Reigate and Banstead             | 4 <sup>th</sup>                      | 276 <sup>th</sup>                      |
| Woking                           | 5 <sup>th</sup>                      | 283 <sup>rd</sup>                      |
| Mole Valley                      | 6 <sup>th</sup>                      | 294 <sup>th</sup>                      |
| Guildford                        | 7 <sup>th</sup>                      | 296 <sup>th</sup>                      |
| Epsom and Ewell                  | 8 <sup>th</sup>                      | 299 <sup>th</sup>                      |
| Surrey Heath                     | 9 <sup>th</sup>                      | 309 <sup>th</sup>                      |
| Elmbridge                        | 10 <sup>th</sup>                     | 310 <sup>th</sup>                      |
| Waverley                         | 11 <sup>th</sup>                     | 313 <sup>th</sup>                      |

Source: IMD 2019

The Index of Multiple Deprivation is comprised of seven individual domains of deprivation: income; employment; education, skills, and training; health and disability; crime; barriers to housing and services; and living environment. These seven domains allow for a more specific understanding of individual aspects of deprivation and are combined to provide an overall figure of deprivation.

The table below shows Runnymede's ranking in each Domain of Deprivation when compared to the 11 local authority districts within Surrey and the 317 local authority areas in England, with 1<sup>st</sup> being the most deprived.



**Table 17: Runnymede rankings for individual IMD Domains of Deprivation**

| <b>Domain of Deprivation</b>     | <b>Rank within Surrey (out of 11)</b> | <b>Rank within England (out of 317)</b> |
|----------------------------------|---------------------------------------|---|
| Income                           | 2 <sup>nd</sup>                       | 273 <sup>rd</sup>                       |
| Employment                       | 6 <sup>th</sup>                       | 293 <sup>rd</sup>                       |
| Education, Skills, and Training  | 2 <sup>nd</sup>                       | 240 <sup>th</sup>                       |
| Health and Disability            | 5 <sup>th</sup>                       | 263 <sup>rd</sup>                       |
| Crime                            | 4 <sup>th</sup>                       | 154 <sup>th</sup>                       |
| Barriers to Housing and Services | 2 <sup>nd</sup>                       | 40 <sup>th</sup>                        |
| Living Environment               | 2 <sup>nd</sup>                       | 136 <sup>th</sup>                       |
| <b>Overall</b>                   | <b>2<sup>nd</sup></b>                 | <b>256<sup>th</sup></b>                 |

Source: IMD 2019

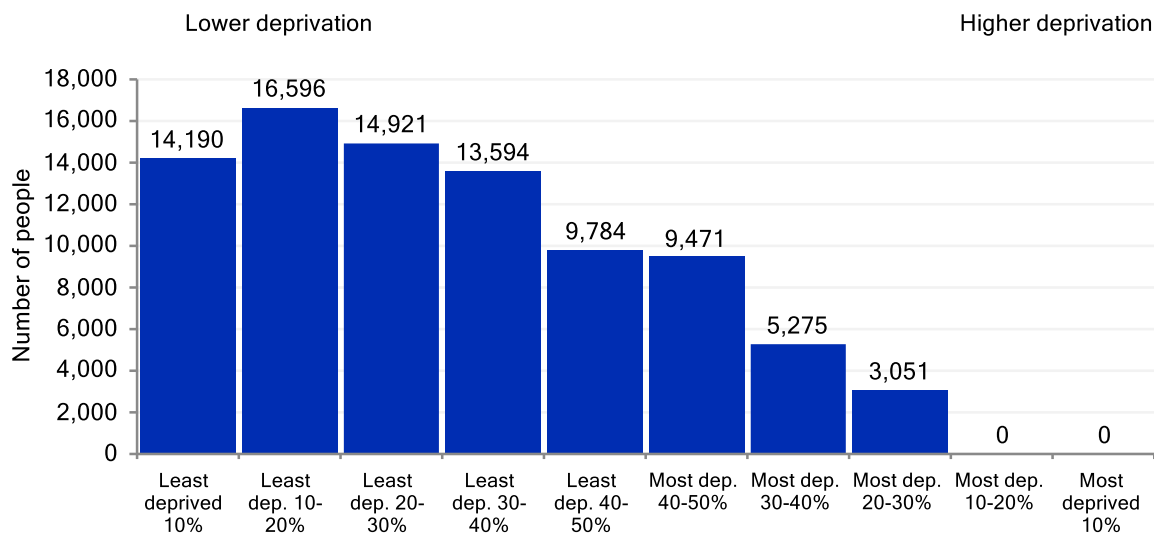
Observing the individual domains of deprivation allows for a considerably more nuanced understanding of deprivation within Runnymede. The figures indicate that Runnymede residents have extremely high access to employment, in the top 10% nationally, and generally have good health, high educational attainment, and are much less likely to reside in low-income households compared to the rest of England.

Conversely, the borough scores in the lower half of English authorities in terms of living environment and risk of crime. By a considerable margin, however, the greatest issue for Runnymede in terms of deprivation is access to housing. Runnymede has the 40<sup>th</sup> worst physical and financial accessibility to housing and services in the country, representing one of the greatest challenges for the borough.

## **Pockets of Deprivation**

Despite the borough's relative affluence compared to England as a whole, viewing Runnymede as a single unit ignores the disparities that exist within specific parts of the borough. Whilst Runnymede contains some of the least deprived areas in the country, Figure 19 demonstrates that 27,581 residents in the borough live in areas that are more deprived than the English national average.

**Figure 19: Number of residents in Runnymede in each deprivation decile**



Source: IMD 2019 (via Local Insight)

Looking at deprivation at neighbourhood level allows for an understanding of the most deprived areas within the borough. For statistical purposes, a neighbourhood refers to a Lower Layer Super Output Areas (LSOA), which are geographical subdivisions, smaller than wards, that have an average population of 1500 people.

In Runnymede, two LSOAs fall within Decile 3 (the 20-30% most deprived neighbourhoods in England), with a further three in Decile 4 (the 30% to 40% most deprived). These neighbourhoods are from across five different ward areas: Englefield Green West, Chertsey St Ann’s, Addlestone North, Addlestone South, and Egham Hythe (listed in order from the most to least deprived).

Profiles of the two most deprived neighbourhoods in the borough can be found later in this chapter, with shorter summaries for the remaining three. These two neighbourhoods are the only two in the borough that are part of the 21 key neighbourhoods identified in the county-wide Health and Wellbeing Strategy published by Surrey County Council in 2022, indicating that they are the neighbourhoods most in need of attention and targeted support.

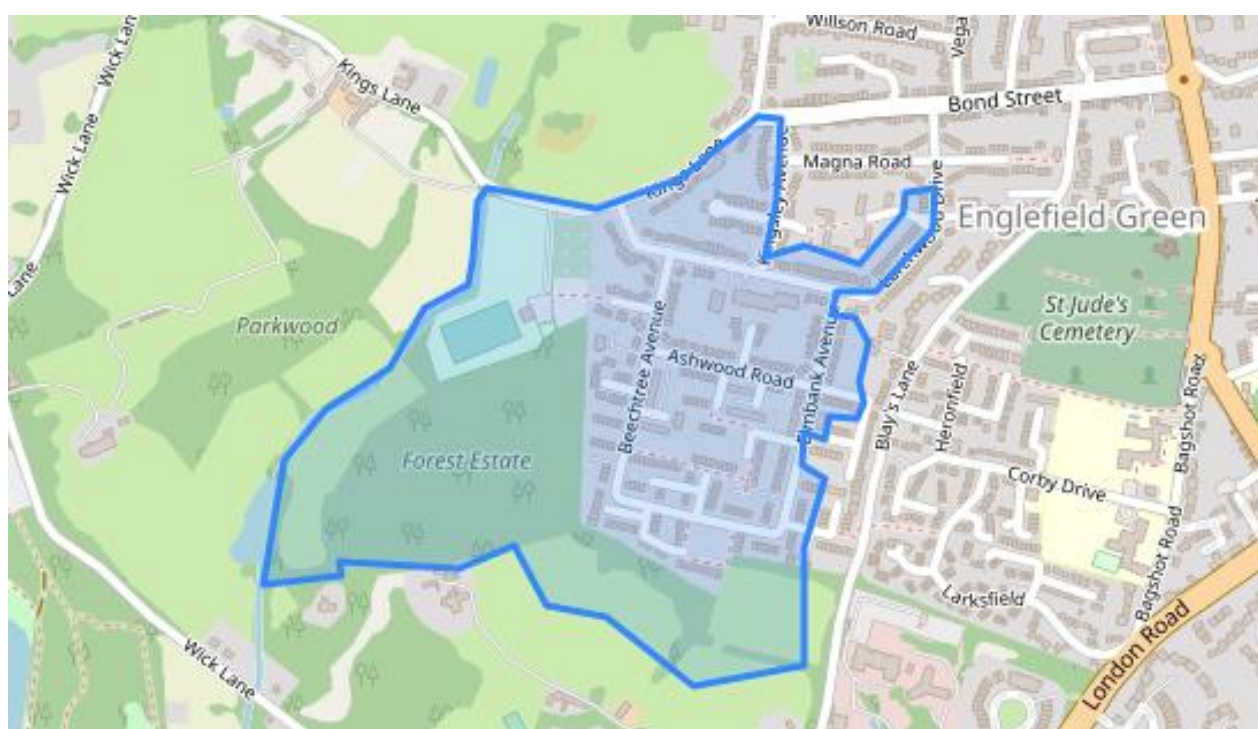
Table 3 provides a breakdown of the ranking of the borough’s five most deprived neighbourhoods in each individual domain of deprivation. The rank is out of 33,755 LSOAs (neighbourhoods) in England. Decile 1 refers to the most deprived 10% of neighbourhoods in England, and Decile 10 refers to the least deprived 10% of neighbourhoods. Please note that the figures listed are not for the whole wards named below, rather they are for a specific LSOA located within each ward.

**Table 18: Domains of deprivation breakdown for Runnymede's five most deprived neighbourhoods**

|  | Runnymede<br>(002F)      |        | Runnymede<br>(006D)  |        | Runnymede<br>(007D) |        | Runnymede<br>(009A) |        | Runnymede<br>(003B) |        |
|--|--------------------------|--------|----------------------|--------|---------------------|--------|---------------------|--------|---------------------|--------|
| Ward                                   | Englefield<br>Green West |        | Chertsey St<br>Ann's |        | Addlestone<br>North |        | Addlestone<br>South |        | Egham Hythe         |        |
| Population                             | 1,454                    |        | 1,644                |        | 1,313               |        | 2,326               |        | 1,762               |        |
|  | Rank                     | Decile | Rank                 | Decile | Rank                | Decile | Rank                | Decile | Rank                | Decile |
| Overall<br>IMD                         | 7,886                    | 3      | 9,605                | 3      | 10,002              | 4      | 12,009              | 4      | 13,347              | 4      |
| Income                                 | 12,336                   | 4      | 8,791                | 3      | 10,977              | 4      | 10,347              | 4      | 14,142              | 5      |
| Employment                             | 19,469                   | 6      | 11,166               | 4      | 8,240               | 3      | 11,672              | 4      | 14,413              | 5      |
| Education<br>Skills &<br>Training      | 1,021                    | 1      | 6,388                | 2      | 9,663               | 3      | 8,313               | 3      | 7,169               | 3      |
| Health<br>Deprivation<br>& Disability  | 9,394                    | 3      | 10,139               | 4      | 14,370              | 5      | 16,928              | 6      | 12,225              | 4      |
| Crime                                  | 9,373                    | 3      | 19,272               | 6      | 8,040               | 3      | 8,685               | 3      | 17,766              | 6      |
| Barriers to<br>Housing and<br>Services | 1,632                    | 1      | 4,327                | 2      | 10,452              | 4      | 16,386              | 5      | 9,571               | 3      |
| Living<br>Environment                  | 24,564                   | 8      | 19,321               | 6      | 11,283              | 4      | 15,377              | 5      | 14,263              | 5      |

Source: IMD 2019 & Census 2021

## Englefield Green West (Runnymede 002F)



The 'Runnymede 002F' LSOA, located in the ward of Englefield Green West, is the borough's most deprived neighbourhood and is the only one in Runnymede to rank in the most deprived quarter of LSOAs in England. It is the 11<sup>th</sup> most deprived neighbourhood in Surrey, out of 709 (Source: IMD 2019). Table Four outlines the LSOAs ranking in each individual domain of deprivation in relation to the borough, the county and England as a whole.

**Table 19: Ranking of Englefield Green West 'Runnymede 002F' LSOA for IMD Domains of Deprivation**

| Domain of Deprivation            | Rank within Runnymede (out of 53) | Rank within Surrey (out of 709) | Rank within England (out of 33755) |
|----------------------------------|-----------------------------------|---------------------------------|------------------------------------|
| Income                           | 5 <sup>th</sup>                   | 56 <sup>th</sup>                | 12336 <sup>th</sup>                |
| Employment                       | 10 <sup>th</sup>                  | 155 <sup>th</sup>               | 19469 <sup>th</sup>                |
| Education, Skills, and Training  | 1 <sup>st</sup>                   | 1 <sup>st</sup>                 | 1021 <sup>st</sup>                 |
| Health and Disability            | 1 <sup>st</sup>                   | 6 <sup>th</sup>                 | 9394 <sup>th</sup>                 |
| Crime                            | 5 <sup>th</sup>                   | 69 <sup>th</sup>                | 9373 <sup>rd</sup>                 |
| Barriers to Housing and Services | 3 <sup>rd</sup>                   | 19 <sup>th</sup>                | 1632 <sup>nd</sup>                 |
| Living Environment               | 3 <sup>rd</sup>                   | 519 <sup>th</sup>               | 24564 <sup>th</sup>                |
| <b>Overall IMD</b>               | <b>1<sup>st</sup></b>             | <b>11<sup>th</sup></b>          | <b>7866<sup>th</sup></b>           |

Source: IMD 2019

The neighbourhood encompasses the majority of the Forest Estate, and consequently contains a high proportion of socially rented households, with 46.4% of residential properties in the LSOA being rented from the council or a housing association (Source: Census 2021).

The neighbourhood is in the most deprived five percent nationally for the education, skills, and training deprivation domain. This domain measures the lack of attainment and skills by the local population. By a considerable margin, this is the lowest score in the borough for this indicator. It is also the lowest score in the county, meaning this neighbourhood is the most deprived in Surrey in terms of education, training and skills.

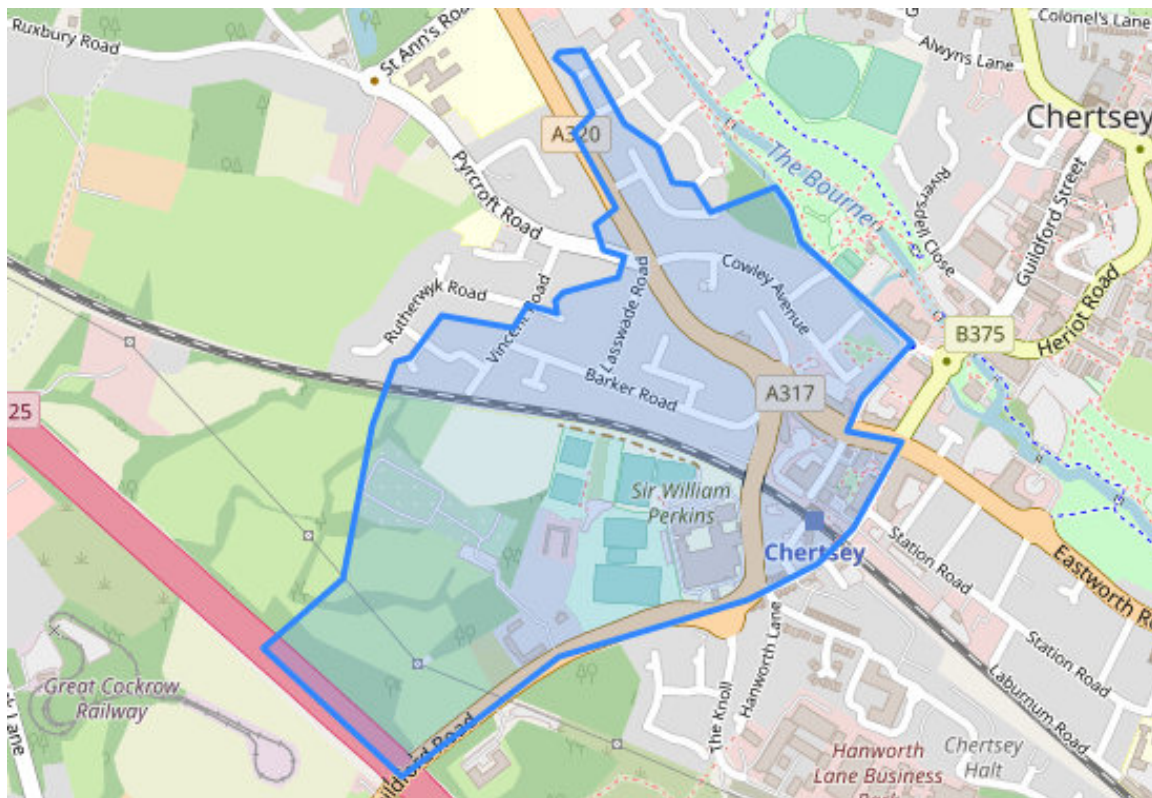
Despite this, the percentage of residents aged sixteen or over in the LSOA reporting to have zero qualifications stands at 18.58%, which is broadly in line with the England and Wales average of 18.2% (Source: Census 2021). This suggests that the primary factor towards the neighbourhood's very high deprivation score for education, skills, and training is not adult skills, but the attainment of young people in the LSOA.

This is evidenced when splitting the education, training, and skills domain into its two sub-domains. For adult skills, the LSOA is the 6737<sup>th</sup> most deprived out of 33,755 in England, placing it in the lowest 20% nationally. For the attainment of children and young people, however, the LSOA ranks as the 39<sup>th</sup> most deprived in England – placing it in the worst 0.015% nationally (Source: IMD 2019).

Whilst caution should be drawn to the relatively small sample sizes when considering data at LSOA level, this represents a major area of concern and suggests further investigation beyond the scope of this assessment may be necessary to ascertain the reasons for such poor educational attainment amongst young people in this area – which is a significant outlier compared to the rest of the borough which otherwise has above average attainment for young people when compared to other English local authorities (Source: IMD 2019). It should be noted that 27.1% of children in the LSOA live in low-income families, which is considerably above the Surrey average of 9.3% and the English average of 18.7% (Source: DWP 2020).

Relative to Surrey, the neighbourhood also proves particularly deprived in relation to health and disability, being the 6<sup>th</sup> most deprived LSOA in the county for health deprivation out of 709. Compared to England, the neighbourhood is among the 30% most deprived for health deprivation (Source: IMD 2019).

## Chertsey St Ann's (Runnymede 006D)



The 'Runnymede 006D' LSOA, located in the ward of Chertsey St Ann's, is the borough's second most deprived neighbourhood and ranks within the 30% most deprived LSOAs within England. The neighbourhood is the 17<sup>th</sup> most deprived in Surrey (Source: IMD 2019). Table Five outlines the LSOAs ranking in each individual domain of deprivation in relation to the borough, the county and England as a whole.

**Table 20: Ranking of 'Runnymede 006D' LSOA for IMD Domains of Deprivation**

| Domain of Deprivation            | Ranking in Runnymede (out of 53) | Ranking in Surrey (out of 709) | Ranking in England (out of 33755) |
|----------------------------------|----------------------------------|--------------------------------|-----------------------------------|
| Income                           | 1 <sup>st</sup>                  | 19 <sup>th</sup>               | 8791 <sup>st</sup>                |
| Employment                       | 2 <sup>nd</sup>                  | 33 <sup>rd</sup>               | 11166 <sup>th</sup>               |
| Education, Skills, and Training  | 2 <sup>nd</sup>                  | 28 <sup>th</sup>               | 6338 <sup>th</sup>                |
| Health and Disability            | 3 <sup>rd</sup>                  | 18 <sup>th</sup>               | 10139 <sup>th</sup>               |
| Crime                            | 34 <sup>th</sup>                 | 313 <sup>th</sup>              | 19272 <sup>nd</sup>               |
| Barriers to Housing and Services | 13 <sup>th</sup>                 | 79 <sup>th</sup>               | 4327 <sup>th</sup>                |
| Living Environment               | 16 <sup>th</sup>                 | 293 <sup>rd</sup>              | 19321 <sup>st</sup>               |
| <b>Overall IMD</b>               | <b>2<sup>nd</sup></b>            | <b>17<sup>th</sup></b>         | <b>9605<sup>th</sup></b>          |

Source: IMD 2019



The area has the highest proportion of residents living in socially rented housing in the borough, at 48.6% (Source: Census 2021). It is also the most income-deprived neighbourhood within the borough, meaning it has the highest proportion of residents out-of-work or in work but with low earnings at 17.0%, compared to 6.6% across Runnymede and 11.8% across England (Source: IMD 2019).

19.4% of residents are Universal Credit claimants, compared to 7.9% across Surrey and 14.2% across England (Source: DWP 2023). This is the highest percentage in the borough. Despite this, the neighbourhood has a higher proportion of those deemed economically active (68.1%) than the Surrey average (63.5%) and the English average (60.9%) (Source: Census 2021).

26.56% of residents aged sixteen or older report having zero qualifications. This is the highest proportion in the borough and significantly above the Surrey average of 12.9%, as well as the England and Wales average of 18.2% (Source: Census 2021). This, however, is a notable fall from 2011, when the figure stood at 30.0% (Source: Census 2011).



#### **Addlestone North (Runnymede 007D)**

- 3<sup>rd</sup> most deprived in Runnymede
- 20<sup>th</sup> most deprived in Surrey
- 10,002<sup>nd</sup> most deprived in England
- 27.77% living in social housing
- 21.79% zero qualifications
- 15.6% universal credit claimants
- 25.7% working age benefit claimants
- 26.3% children in poverty



#### **Addlestone South (Runnymede 009A)**

- 4<sup>th</sup> most deprived in Runnymede
- 45<sup>th</sup> most deprived in Surrey
- 12,009<sup>th</sup> most deprived in England
- 37.13% living in social housing
- 21.79% zero qualifications
- 21.1% universal credit claimants
- 28.6% working age benefit claimants
- 27.8% children in poverty



### Egham Hythe (Runnymede 003B)

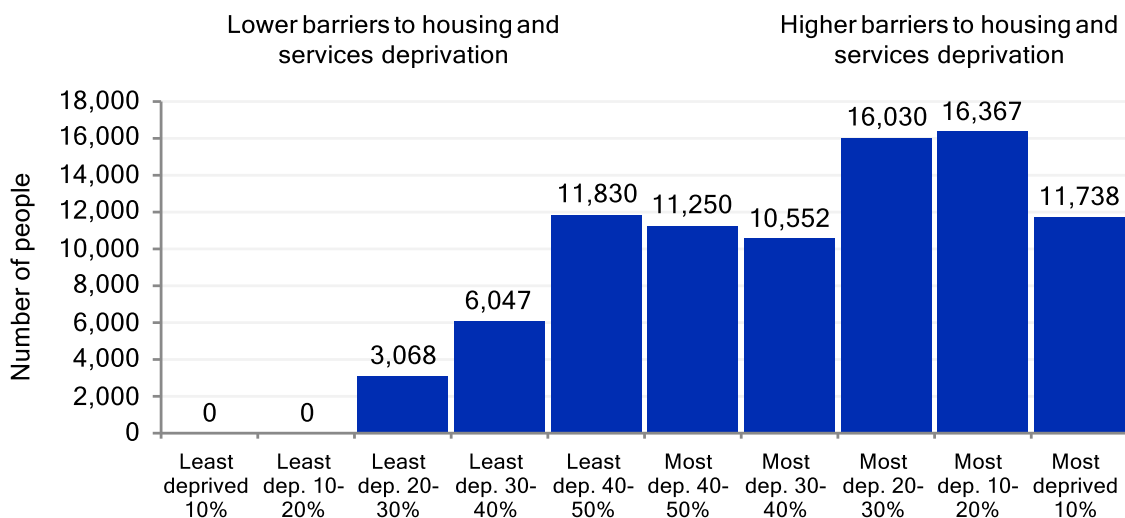
- 5<sup>th</sup> most deprived in Runnymede
- 58<sup>th</sup> most deprived in Surrey
- 13,040<sup>th</sup> most deprived in England
  
- 37.48% living in social housing
- 20.60% zero qualifications
- 12.8% universal credit claimants
- 19.7% working age benefit claimants
- 13.3% children in poverty

## Deprivation and Housing

Poor access to housing and services remains one of the borough’s key issues in terms of deprivation. As a constituent data source of the IMD, the ‘Barriers to Housing and Services’ domain measures the physical and financial accessibility of housing and local services. The indicators fall into two subdomains: ‘geographical barriers’, which relate to the physical proximity of local services such as GPs and supermarkets, and ‘wider barriers’, which includes issues relating to access to housing such as affordability.

The majority of Runnymede residents live in neighbourhoods that are in the worst 30% nationally in terms of barriers to housing and services, as indicated by Figure 20. Three Runnymede neighbourhoods are in the most 5% deprived nationally for this indicator. These are, in order from most to least deprived for this indicator, Runnymede 008A (Ottershaw and Lyne), Runnymede 007F (Addlestone North), and Runnymede 002F (Englefield Green West).

**Figure 20: Number of residents in Runnymede living in each decile of deprivation for barriers to housing and services.**



Source: IMD 2019 (via Local Insight)



Like much of the South East, the high cost of property is a major factor contributing towards Runnymede's high level of housing deprivation. Out of 331 local authorities in England and Wales, Runnymede had the 43rd highest median house price as of September 2022, at £460,000 (Source: ONS, Median house prices for administrative geographies, 2023).

Considering median earnings, this means that in 2022, the average full-time employee in Runnymede could expect to spend around 11.98 times their annual earnings buying a home. This is compared to a figure of 8.3 times their annual earnings for England as a whole (Source: ONS, House price to workplace-based earnings ratio, 2023).

High housing costs likely contribute to Runnymede having a higher proportion of households deemed overcrowded (6.0%) compared to England and Wales (4.3%) (Source: Census 2021).

Despite this, Runnymede has a higher proportion of owner-occupied houses than the national average at 67.9%, compared to 62.3% across England, though this remains lower than the Surrey average of 71.7% (Source: Census 2021). 13.0% of households within the borough are socially rented, compared to 11.4% across Surrey and 17.1% across England (Source: Census 2021).

## Analysis and Summary

Ultimately, deprivation in Runnymede is best viewed in a relative sense. When considering deprivation on a nationwide level, the borough appears reasonably undeprived. Yet when deprivation is analysed at county level, a different picture emerges. Compared to Runnymede's neighbouring Surrey boroughs, many more residents experience elements of deprivation. Whilst ranking as the 61<sup>st</sup> least deprived area in England, it is the 2<sup>nd</sup> most deprived borough in Surrey, with it evident that more needs to be done to raise the quality of life for the small but significant proportion of Runnymede's residents experiencing deprivation.

Runnymede contains some of the wealthiest parts of the country, but this should not mask the pockets of deprivation that exist in parts of the borough. Being aware of the areas of need and the specific issues that they face is vital in improving outcomes and tackling the issue of deprivation. This chapter has outlined Runnymede's two most deprived areas, finding that issues exist in these areas in matters such as poor educational attainment as well as health. Targeted intervention, particularly in relation to skills, is important to raise the outcomes of residents in these areas.

It is also important to recognise that deprivation is not one single individual issue but is instead composed of multiple spheres. Runnymede's ranking in each of the seven individual domains of deprivation identified in the IMD varies, though by far the most serious domain of deprivation for the borough, and perhaps one of the greatest challenges Runnymede faces as a whole, is poor access to housing. Whilst Runnymede is not unique in facing this challenge, it is clear that more needs to be done to address this issue in order to raise the standards of living for all in the borough.

The spheres of deprivation however are often highly intertwined, with the underlying causes of deprivation tending to be complex and highly entrenched. A joined-up approach is therefore required between local communities and public sector partners to tackle the issue of deprivation to ensure the most equitable outcomes for all.

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