Gloucestershire County Council

gfirst LEP

LABOUR MARKET AND SKILLS REVIEW 2018/19

October 28, 2019

Purpose of the review

This document presents a comprehensive review of the work and skills landscape across Gloucestershire. It analyses the latest data on labour market change, skills supply and business demand in the Gloucestershire area along with comparing against national trends where possible to set findings in context.

This document is broadly comparable with the GFirst LEP area skills statement of 2016 and The Gloucestershire Employment and Skills Board Evidence Base 2017.

Local Enterprise Partnerships (LEPs) have been given a clear task by the Government to provide the strategic leadership to set economic priorities and create the right environment for business and growth[1]. GFirst the LEP for Gloucestershire, role is to drive sustainable economic growth in the county, and by doing so, create jobs and business opportunities[2].

At GFirst, the Local Enterprise Partnership for Gloucestershire the Board have committed to the following vision:

'By 2022, Gloucestershire will have world class companies, a diverse businesses portfolio and a reputation for starting and growing great businesses'[3]

Key to achieving this is the LEPs skills objective of creating 'a highly employable and economically productive population'. Part of the skills vision is to ensure that the County produces talented people with the skills businesses need. GFirst has committed to:

• Develop a strong partnership between education and business to support bridging the skills gap

• Equip students with the skills that businesses need; and provide careers opportunities for local skilled talented individuals.

The evidence underpinning this Statement allows all interested parties to develop a picture of employer need in the GFirst LEP area and compare that with the skills of the current workforce and the provision of skills and education for the future workforce.

[1] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/32076/cm7961-local-growth-white-paper.pdf
[2] http://www.gfirstlep.com/gfirst-LEP/About-Us/Overview/
[3] http://www.gfirstlep.com/gfirst-LEP/Our-Priorities/Our-Vision/

The *GFirst LEP Area Skills Statement*:

• sets out the skills needs of the Gloucestershire area to enable discussion and action;

• allows national and European funding to be effectively targeted on local priorities;

• can be used as a basis for ensuring that publicly-funded provision and private investment in skills reflect local labour market requirements;

• provides a baseline of information to inform the direction of the County's Employment and Skills Board.

Since the publication of the gfirst LEP's strategic economic plan for Gloucestershire (2014, revised 2018) the LEP have set up the Gloucestershire Employment & Skills Board (GESB) that provides ourselves, the Gloucestershire ESIF Committee, and our local authority partners with a specialist group of local employers and education and training providers that makes recommendations on revenue and capital skills funding priorities and skills projects within Gloucestershire.

The GESB, which is currently chaired by the CEO of UCAS, helps to optimise the impact of employment and skills investment for local communities, employers and individuals and to keep the 'direction of travel' of local education and training providers aligned with local business recruitment, employment and skills needs and working collaboratively whilst still respecting the providers' own organisational business needs and drivers.

Gfirst LEP's Local Industrial Strategy five foundations of productivity:

- **People** – population, demography, skills, economic activity and inactivity. The government ambition is to 'generate good jobs and greater earning power for all'.
- **Ideas** – investment in R&D, new product and service development. The ability to create new ideas and deploy them is essential to becoming 'the world's most innovative economy'.
- **Infrastructure** – highlighting the major infrastructure in the county, both physical and digital. This is key to understanding the conditions that hinder business performance.
- **Business Environment** – understanding our sectors and business base, entrepreneurialism and employment demand. The ambition is to become 'the best place to start and grow a business
- **Place** – understanding how a prosperous place can not only drive productivity but also deliver inclusive growth across the whole geography.

Contents

Executive Summary

This evidence base has been prepared to serve a number of inter-related key purposes:

To support our preparation of the GFirst LEP Gloucestershire Local Industrial Strategy (LIS) by expanding on the LIS evidence base The Gloucestershire Five Foundations of Productivity Evidence Report and going into further detail about some aspects of the Gloucestershire employment and skills 'landscape'.

To enable the Gloucestershire Employment and Skills Board (GESB) to transition into it's role as a Skills Advisory Panel (SAP) in line with all other employment and skills boards in England. This includes the use of standard data sets so that national and regional comparisons and benchmarking can be undertaken. The GESB/SAP will make recommendations to the GFirst LEP Board, to Gloucestershire County Council and to the Gloucestershire Economic Growth Joint Committee (GEGJC) to enable skills capital and revenue funding to be bid for and allocated in Gloucestershire, based on and targeted to deal with local priorities. It will also work closely with the education and skills training providers to ensure they are fully aware of and work towards achieving local employment and skills priorities.

Our employment and skills evidence base will remain a 'live' document so that it accurately reflects the rapidly changing local and national employment and skills 'landscape'. With this in mind, it will be reviewed and updated annually and in-year updates will be included when key data sets are released/made available (e.g. Education and Skills Funding Agency (ESFA) data cube releases, census updates, etc.).

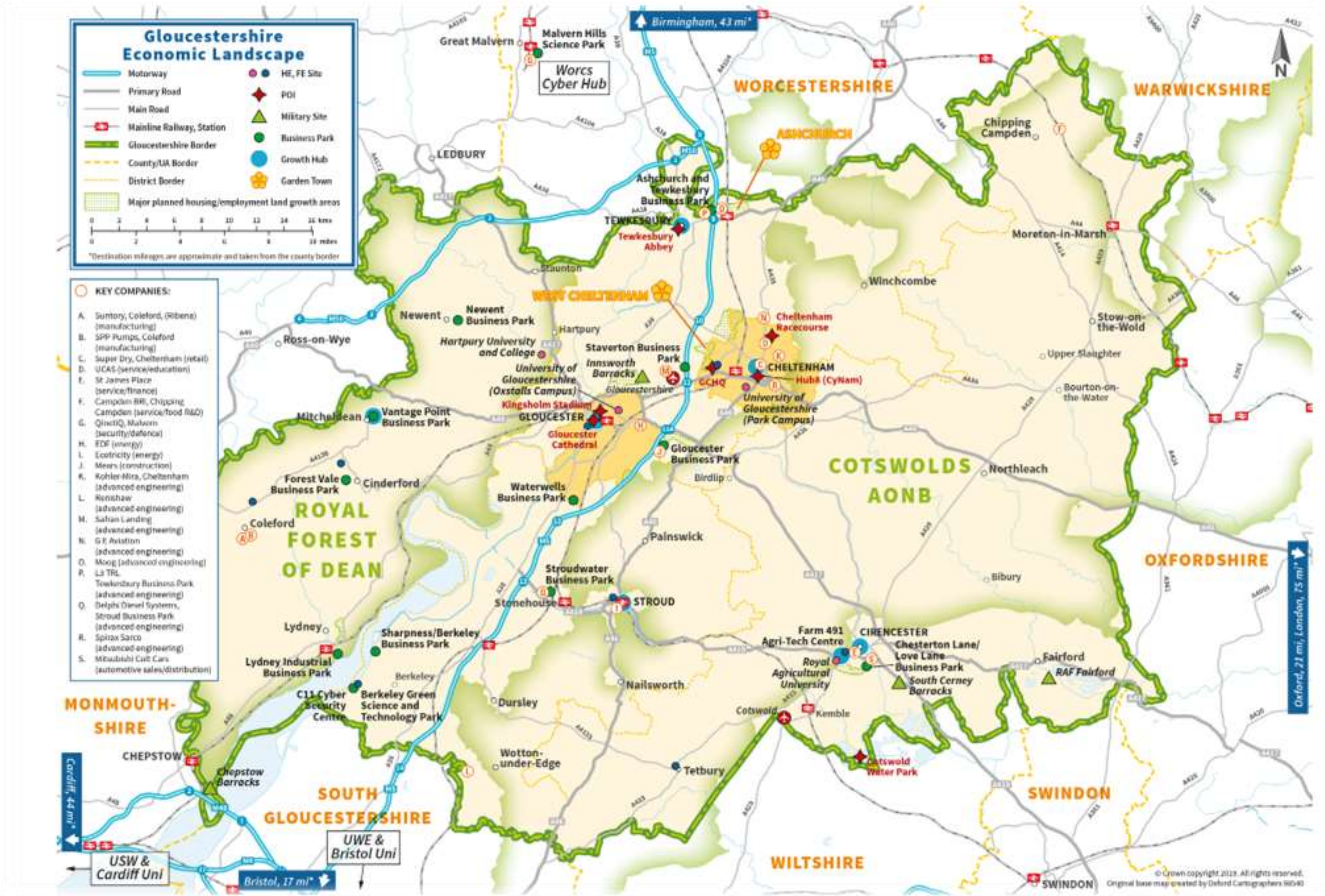
I would like to thank John Mayell in the Gloucestershire County Council Skills and Employment Commissioning Team for his excellent work in gathering, collating, interpreting and presenting the data and information in the employment and skills evidence base.

I look forward to working with the Gloucestershire Employment and Skills Board to make full use of the evidence base in order to shape and influence local employment and skills provision and actions.

Pete Carr

Lead Commissioner – Employment & Skills
Gloucestershire County Council and GFirst Local Enterprise Partnership

October 2019



Gloucestershire Economic Landscape
Motorway
Primary Road
Main Road
Mainline Railway, Station
Gloucestershire Border
County/UA Border
District Border
Major planned housing/employment land growth areas
HE, FE Site
POI
Military Site
Business Park
Growth Hub
Garden Town
*Destination mileages are approximate and taken from the county border
KEY COMPANIES:
A. Suntory, Coleford, (Ribena) (manufacturing)
B. SPP Pumps, Coleford (manufacturing)
C. Super Dry, Cheltenham (retail)
D. UCAS (service/education)
E. St James Place (service/finance)
F. Campden BRI, Chipping Campden (service/food R&D)
G. QinetiQ, Malvern (security/defence)
H. EDF (energy)
I. Ecotricity (energy)
J. Mears (construction)
K. Kohler Mira, Cheltenham (advanced engineering)
L. Renishaw (advanced engineering)
M. Safran Landing (advanced engineering)
N. G E Aviation (advanced engineering)
O. Moog (advanced engineering)
P. L3 TRL Tewkesbury Business Park (advanced engineering)
Q. Delphi Diesel Systems, Stroud Business Park (advanced engineering)
R. Spirax Sarco (advanced engineering)
S. Mitsubishi Colt Cars (automotive sales/distribution)
Birmingham, 43 mi*
Great Malvern
Malvern Hills Science Park
Worcs Cyber Hub
WORCESTERSHIRE
WARWICKSHIRE
N
LEDBURY
Chipping Campden
Ashchurch and Tewkesbury Business Park
TEWKESBURY
Tewkesbury Abbey
Moreton-in-Marsh
Staunton
Winchcombe
Newent
Newent Business Park
Ross-on-Wye
Hartpury
Hartpury University and College
Staverton Business Park
Innsworth Barracks
Gloucestershire
University of Gloucestershire (Oxstalls Campus)
Kingsholm Stadium
GLOUCESTER
Gloucester Cathedral
Cheltenham Racecourse
CHELTENHAM
GCHQ
Hub8 (CyNam)
University of Gloucestershire (Park Campus)
Stow-on-the-Wold
Upper Slaughter
Bourton-on-the-Water
Mitcheldean
Vantage Point Business Park
Gloucester Business Park
Birdlip
COTSWOLDS AONB
Northleach
Forest Vale Business Park
Cinderford
Waterwells Business Park
ROYAL FOREST OF DEAN
Coleford
Painswick
OXFORDSHIRE
Oxford, 21 mi, London, 75 mi*
Bibury
Stroudwater Business Park
Stonehouse
STROUD
Lydney
Sharpness/Berkeley Business Park
Farm 491 Agri-Tech Centre
CIRENCESTER
Chesterton Lane/Love Lane Business Park
Royal Agricultural University
South Cerney Barracks
Fairford
RAF Fairford
Lydney Industrial Business Park
Berkeley
C11 Cyber Security Centre
Berkeley Green Science and Technology Park
Nailsworth
Dursley
Cotswold
Kemble
MONMOUTH-SHIRE
CHEPSTOW
Chepstow Barracks
Wotton-under-Edge
Tetbury
Cotswold Water Park
SOUTH GLOUCESTERSHIRE
SWINDON
Cardiff, 44 mi*
UWE & Bristol Uni
USW & Cardiff Uni
Bristol, 17 mi*
WILTSHIRE

Gloucestershire Overview

Gloucestershire has a prosperous and resilient economy set within a highly attractive natural environment, which offers a high standard of living for local residents. The county is predominantly rural with two urban centres that serve as the main business and commercial heartland. The urban settlements are complemented by vibrant market towns that act as valuable employment hubs and key providers of services. The development of the county has been strongly influenced by connectivity to the Midlands and South West via the M5 corridor and to London and the South East via the M4 corridor. Gloucestershire produced £16.488bn of economic output in 2017, representing 12.6% of the output of the South West region, 1.08% of the total output for England, and 0.92% of the total output for the UK. In addition, Gloucestershire ranks 13th of 38 LEPs in terms of productivity per worker.

The health of the Gloucestershire labour market which deteriorated after the recession in line with national trends has recovered gradually to a position of strength. The employment rate (the proportion of residents aged from 16 to 64 who were in work) stood at 75.6% during the peak of the recession (April 2009- March 2010) and has recovered to 82.1% during the period October 2017 to September 2018, which is well above the national average of 75.1%[4]. The corresponding unemployment rates have consequently reduced. Although worklessness may be less of a challenge than previously and in other parts of the country there are however, still issues in the county particularly in relation to youth unemployment and long term unemployment.

Gloucestershire has a better qualified population than the country as a whole. This is reflected in the county's occupation structure, with a greater proportion of professional occupations than at the regional and national level. Attrition rates are notably low with 83% of residents in Gloucestershire also working in the county[5].

There are around 29,235[6] businesses in the county supporting a well-qualified and highly skilled employed workforce of approximately 289,400 people[7]. Both manufacturing and health are significant sectors in terms of employment. Other major sectors include public administration and defence (e.g GCHQ), education, construction and retail[8]. Employment growth is predicted in the health, business administration and support services, construction, accommodation and food services and the mining, quarrying and utilities sector[9].

The Strategic Economic Plan sets out ambitious plans to accelerate economic growth by focusing on key drivers of productivity and supporting growth in high value sectors. They include the nuclear-based power generation industry, high tech manufacturing particularly relating to aerospace and precision engineering and medical instruments and knowledge intensive services including the finance and insurance sectors; the ICT sector (particularly digital media)

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[4] Annual Population Survey, Oct 2017-September 2018, ONS https://www.nomisweb.co.uk.
[5] 2011 Census, ONS https://www.nomisweb.co.uk
[6] UK Business Counts – Enterprises, 2017, ONS https://www.nomisweb.co.uk.
[7] Business Register and Employment Survey,2018, ONS https://www.nomisweb.co.uk
This includes employees plus working owners, it is a workplace based measure meaning it captures those that work in the county, rather than those who live in Gloucestershire.
[8] Business Register and Employment Survey,2015, ONS https://www.nomisweb.co.uk
[9] LEFM

and businesses in professional, scientific and technical activities. While these sectors provide a focus, Gloucestershire will also offer a supportive environment for all businesses to move up the value chain regardless of which sector they are in. For example there are opportunities for productivity growth in agriculture through agri-tech which has been identified by government as one of 'eight great technologies' needed to address the increasing demand for more efficient food production and land management[10].

Maintaining economic growth in light of global and local issues such as the ageing workforce, retention of young qualified people, skill shortages in certain sectors and matching of skill supply and demand within a highly influential global activity will present many challenges and opportunities to the future economy of Gloucestershire.

Global economic setting:

The latest figures published by the Organisation for Economic Co-operation and Development (OECD) in December 2016 reveal that the UK is climbing the world rankings in both reading and science.

The global outlook for 2016/17 has worsened[11], with projections suggesting growth will slow to 3.1% in 2016 before recovering to 3.4% in 2017. This reflects a more subdued outlook for advanced economies following the June UK vote in favor of leaving the European Union (Brexit) and weaker-than-expected growth in the United States. These developments have put further downward pressure on global interest rates. Although the initial market reaction to the Brexit shock was limited, the ultimate impact remains very unclear, as the fate of institutional and trade arrangements between the United Kingdom and the European Union is uncertain.

Risks to the UK economic outlook:

- Brexit uncertainty, especially No Deal
- Trade Wars / Protectionism
- Weakening global Conditions
- Constraints on Policy Responses
- Time – late stage of the Cycle

International comparative performance showing that when compared with the rest of the G7, the UK had a lower output per worker and output per hour worked in 2016. In terms of GDP per worker the greatest difference was with the US, while in terms of GDP per hour worked, the greatest difference was with Germany. Japan was the only G7 country that had a lower level of productivity than the UK across both measures.

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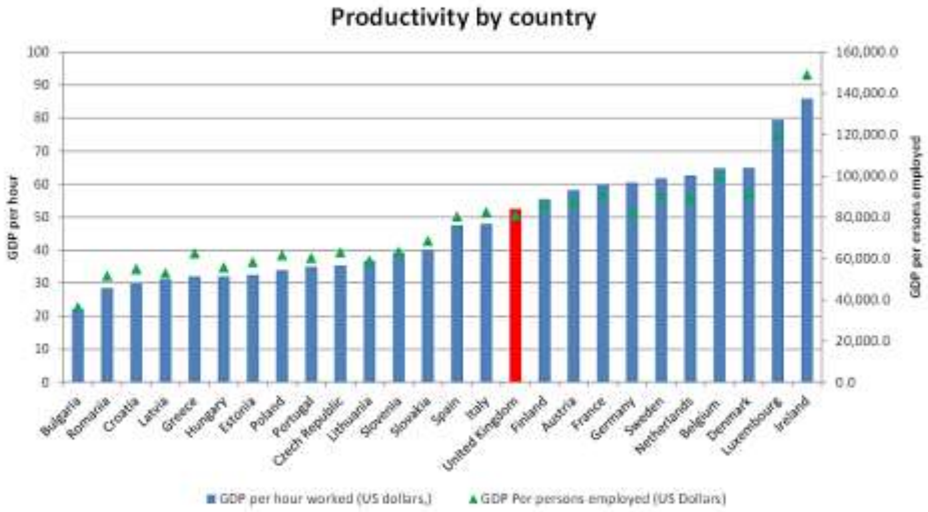
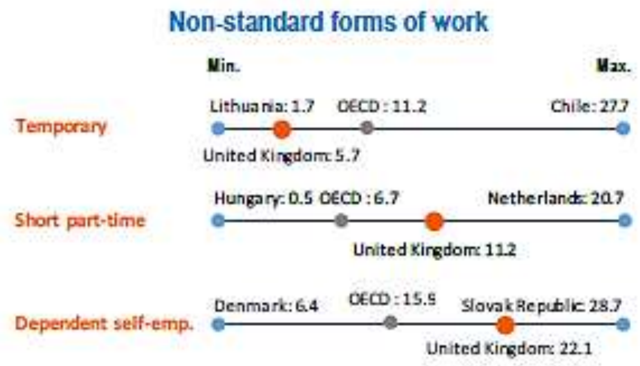
[10] GFirst Strategic Economic Plan, http://www.gfirstlep.com/Our-Priorities/Our-Vision/
[11] World Economic Outlook, October 2016 http://www.imf.org/external/pubs/ft/weo/2016/02/

In International Comparisons of UK Labour Productivity by Industry (2014) output per hour is relatively poorer across Knowledge based industries in particular. Public administration, Finance and insurance, Professional scientific and technical sectors, and Information and communication sectors all trail in the bottom third of EU27 comparative productivity rankings.[12]



The United Kingdom is one of the OECD countries that have experienced the fastest growth in ICT use in the workplace over the past two decades. Despite this, jobs in the United Kingdom are at a lower risk of automation than the OECD average. [13]



[12] OECD, http://stats.oecd.org/Index.aspx?DataSetCode=PDB_LV# & International comparisons of UK productivity (ICP), final estimates: 2016
[13] oe.cd/employment-outlook - Source: OECD Employment Outlook 2019, The Future of Work, https://doi.org/10.1787/9ee00155-en.

Gloucestershire Economic Growth Capital Investment Pipeline (CIP)

Gloucestershire is ambitious for economic growth. With a residential population of over 600,000 people and a business population of approximately 30,000, the County Council and its partners are working hard to make sure the local infrastructure and wider environment is fit for purpose in supporting the growth agenda, for now and into the future.

Working with our partners across the county to explore, prepare for and deliver new infrastructure and an improved climate for investment, we are focused on a single mission. This mission is to accelerate economic growth by focusing on key drivers of productivity. This strategy is one that is central to our Local Enterprise Partnership GFirst.

The investment required comes in all forms to deliver against a broad range of priorities including:
- Innovation – to ensure new ideas can be brought forward
- Skills and employment – delivering inclusive opportunities for our residents and businesses
- Business environment – to make sure our business community
- Infrastructure, including energy and digital connectivity – crucial to the future of our business and resident population
- Housing – across a range of tenures and locations
- Regeneration and place shaping – to make sure that Gloucestershire is a great place to live, work and visit.

Gloucestershire's Labour Market

Issues

- In the Centre for Cities report the authors categorise cities into four groups according to their performance in terms of exports and productivity. Gloucester falls into the third quadrant; a group of cities that underperform and urgently need to improve. Gloucester is below average for exports per job and productivity per job[14].
- The proportion of employment in the three lowest-skilled occupations is slightly lower than the UK average. In Gloucestershire, 24% of employment is in sales or customer service, plant/process operatives and elementary roles, compared with a UK average of 25%.
- The UKCES data reports that Gloucestershire employers identified 10,566 employees assessed as not being fully proficient in their jobs. This accounted for 4% of total employment (slightly below the national average of 5%). This figure of over 10,000 people not being fully proficient in their jobs has ramifications on the county's productivity as already mentioned. Further work should be done to look more closely as to why over 10,000 people are not fully proficient, in what sectors and at what level; if they have just come out of education this should be examined to ensure what is being taught is relevant to employers needs.
- Gloucestershire is losing graduate skills the most. 60.7% remain in the LEP area 6 months after graduating which may sound high but not compared to Cornwall and Isles of Scilly at 74.9%. Out of 38 LEP regions Gloucestershire ranks 32nd for retaining graduates 6 months after graduation.
- Although unemployment in the county is generally low, unemployment has been consecutively increasing. The claimant rate in Gloucestershire was 1.8% in February 2019. The South West rate increased to 2.0% and the UK rate increased to 2.6%. Gloucestershire's rate was 0.2% lower than the South West average of 2.0%, and 0.8% lower than the UK average of 2.6%. The claimant count in Gloucestershire in February 2019 increased by 460 people. The amount of people claiming in February 2019 was 7.3% higher than the number in January 2019. This compares to a 8.0% increase in the South West and a 6.5% increase for the UK.
- Gloucestershire shows a higher proportion of long term unemployed than the South West.
- Commuting to work - overall there is a net outward flow from Gloucestershire, with more people going out of the county for work than coming in[15].
- There were a total of 6,320 households with dependent children where no adults were in employment, representing nearly one in ten households with dependent children. Research shows that children whose families are out-of-work are at greater risk of experiencing child poverty as well as other difficulties associated with family hardship[16]
- 7.5% of labour demand is for specific STEM occupations representing just under 23,000 roles. Gloucestershire ranks above average (16 of 38) for STEM employment but faces a challenge in that it does not produce STEM graduates at a large enough scale locally to support the employment base and is relatively poor at graduate retention in relation to local comparator areas.[17]
- Rural connectivity is often poor – public transport services connecting smaller settlements are infrequent and usage is generally low.

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[14] http://www.centreforcities.org/wp-content/uploads/2017/01/Cities-Outlook-2017-Web.pdf

[15] Ibid.

[16] Census 2011

[17] Gfirst LIS Five Foundations of Productivity

Implications

- Youth unemployment has been shown to have significant impacts on individuals, including reducing their life chances[18].
- Long term unemployment can lead to a loss of skills and the motivation to work, and can result in individuals being permanently excluded from the labour market[19]. Long term unemployment is defined by the International Labour Organization as all unemployed persons with continuous periods of unemployment extending for one year or longer (52 weeks and over)[20].
- Over 10,000 employees in Gloucestershire are not proficient at their job[24]. To change this requires training and investment. A number of reasons were given when asked why employers didn't offer more training. The most popular responses were; lack of funds /training expensive mentioned by 48% of respondents (but lower than the national average of 51%). Can't spare more staff time (having them away on training) was mentioned by 44% of Gloucestershire businesses (lower than the national average of 49%).
- The working age population (those aged 20-64) is projected to rise by only 1.4% over the same period. This increase is lower than the national trend for this group and means that by 2039 the working population in Gloucestershire will have fallen from 57.1% of the population to 49.6% of the population. This will limit the pool from which employers can recruit and may have implications for the ability of the local economy to grow, unless growth is accompanied by a rise in productivity.
- There is shifting demographic in Gloucestershire, with people living longer and young people leaving. A stark regional difference, for example, is that on average Bristol attracts 4,000 young people every year while Gloucestershire loses 400.

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[18] Youth unemployment produces multiple scarring effects, http://blogs.lse.ac.uk/politicsandpolicy/multiple-scarring-effects-of-youth-unemployment
[19] Tackling long-term unemployment: the research evidence, CentrePiece
[20] International Labour Organization, http://kilm.ilo.org/2015/download/kilm11EN.pdf, accessed 13/09/16

SECTION ONE

LABOUR MARKET BACKGROUND

Population – Overview:

- The population of Gloucestershire was estimated to be around 633,558 in 2018, representing a rise of approximately 5,419 people since 2017. This is the equivalent to a growth of 0.9% in population from 2017 to 2018, which was higher than the rate of growth for England and Wales. The district of Gloucester has the largest population in the county and the Forest of Dean has the smallest. From 2017 to 2018, Tewkesbury had the fastest rate of growth in the county (2.5%) whilst Cheltenham had the lowest rate with a decline of -0.03%.[21]
- from 2017 to 2018, population growth in Gloucestershire was fastest in the 65+ age group, which increased by 2.1%; this was faster than the rates for this age group in the South West and England and Wales (1.6% and 1.5% respectively). The rate of growth in the children and young people (0-19) population in Gloucestershire (0.6%) was slightly higher than the rates for the South West and England and Wales (0.3% and 0.5% respectively) whilst the growth in the working age (20-64) population of 0.5% was slightly higher than England and Wales and the same as the South West.
- There is a perception that, post-university education, the county suffers a net loss of its young talent, which is a concern. However, between 2006 and 2016, the largest net inflow of people to Gloucestershire was in the economically active age group 30 to 44 years and of children less than 15 years of age[22].

Future population:

- On current trends, the latest ONS 2014-based interim projections suggest that Gloucestershire's population will increase by 102,700 people or 16.8% to about 714,000 in 2039. This compares to a projected national increase of 16.5%.

At district level:

- Gloucester had the highest number of 0-19 year olds (32,034) and Cotswold the lowest number (18,146).
- Gloucester and Cheltenham had the highest number of 20-64 years olds (75,681 and 68,196 people respectively) and Forest of Dean and Cotswold the lowest (47,055 and 48,116 people respectively).
- Stroud has the highest number of people aged 65 and over with 26,618 people.

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[21] https://inform.gloucestershire.gov.uk/population/ Mid-2018 population estimates
[22] Mid 2017 Population Estimates - , ONS https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates

District	Population change (%2017-18)	Net internal migration rate (% 2017 to 2018)	Net international migration rate (% 2017 to 2018)	Natural change rate (% 2017 to 2018)	rank of pop change (of 391 UK districts)
Tewkesbury	2.51	2.05	0.18	0.2	5
Cotswold	1.73	1.66	0.28	-0.21	19
Stroud	0.75	0.78	0.13	-0.15	115
Forest of Dean	0.68	0.64	0.19	-0.18	139
Gloucester	0.16	-0.54	0.27	0.44	303
Cheltenham	-0.03	-0.22	0.13	0.06	347

Source: mid-2018 Population Estimates, Office for National Statistics

Age Band	Number of people 2018	Gloucestershire %	South West %	England and Wales %
0-19	142,244	22.5	22.0	23.6
20-64	356,341	56.2	56.0	58.1
65 and over	134,973	21.3	22.0	18.3

Age Band	Number of people 2018	Gloucestershire %	South West %	England and Wales %
90+	6562	1.0	1.1	0.9

	Population 2018	Population 2017	Change 2017 to 2018	% Change 2017 to 2018
Gloucestershire	**633,558**	**628,139**	**5,419**	**0.9%**
Cheltenham	117,090	117,128	-38	**0.0%**
Cotswold	89,022	87,509	1,513	**1.7%**
Forest of Dean	86,543	85,957	586	**0.7%**
Gloucester	129,285	129,083	202	**0.2%**
Stroud	119,019	118,130	889	**0.8%**
Tewkesbury	92,599	90,332	2,267	**2.5%**
South West	**5,599,735**	**5,559,316**	**40,419**	**0.7%**
England	**55,977,178**	**55,619,430**	**357,748**	**0.6%**
England and Wales	**59,115,809**	**58,744,595**	**371,214**	**0.6%**
Great Britain	**64,553,909**	**64,169,395**	**384,514**	**0.6%**
United Kingdom	**66,435,550**	**66,040,229**	**395,321**	**0.6%**

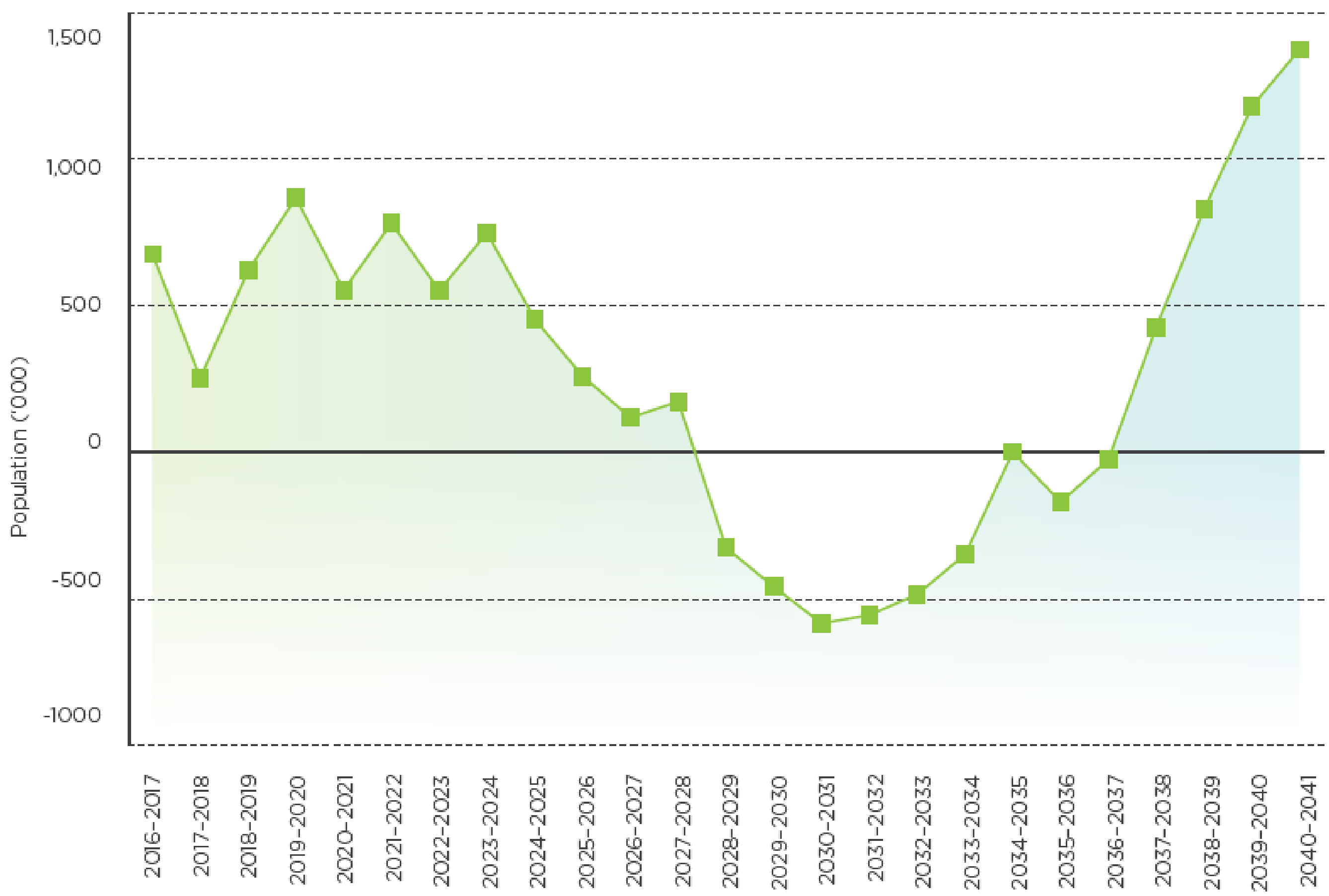
Tewkesbury Borough is estimated to have grown the fastest over the past year with 2.5% increase in population 2017-2018. In fact it has the 5th highest growth amongst districts of the UK (see Table 2). Only City of London, Westminster, Camden and Tower Hamlets exceed it. The increases in the population in these four London Boroughs are largely driven by International Migration whereas in Tewkesbury it is largely driven by internal migration.

The Cotswold District is ranked 19th of 391 districts again driven largely by internal migration as the natural change (births minus deaths) is negative.

Stroud District and The Forest of Dean rank 115th and 139th

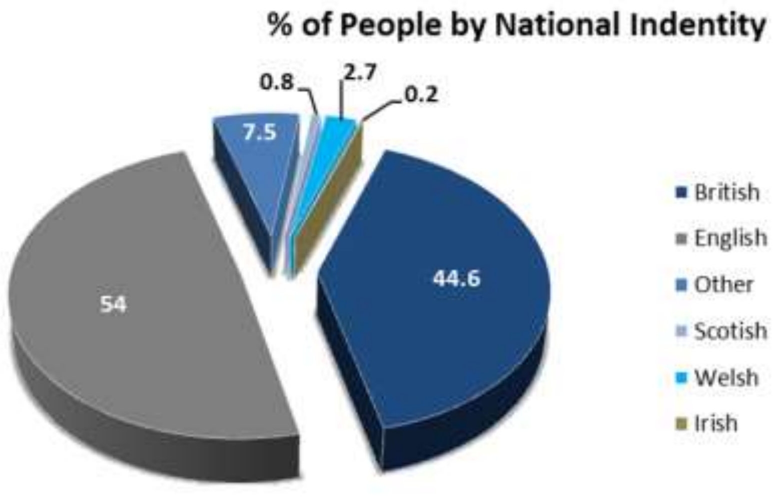
Gloucester and Cheltenham have low growth and are ranked 303rd and 347th respectively. Both these districts have negative internal migration rates and in Cheltenham's case the population change is negative.

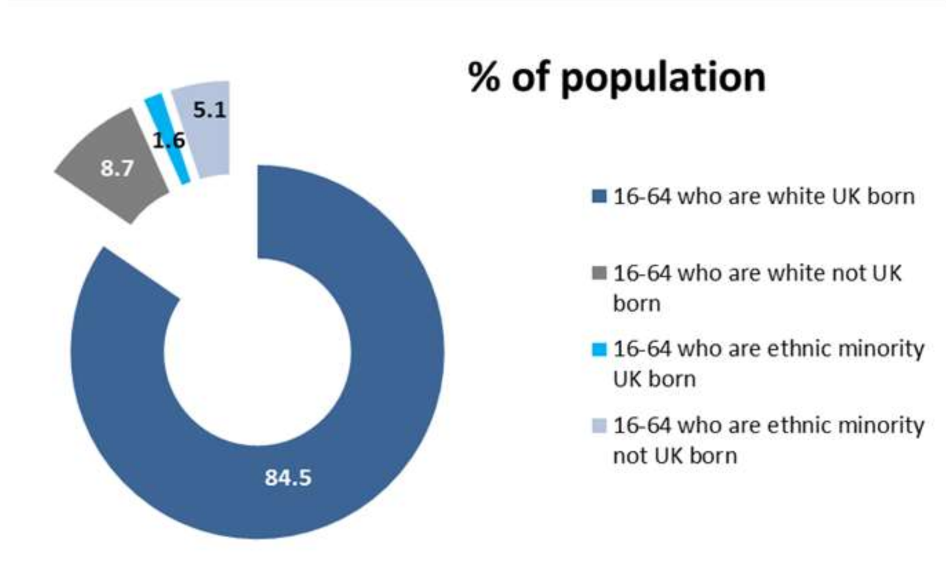
Annual net change in Gloucestershire's 16-64-year-old population, 2016-41



The above figure looks at the annual change in Gloucestershire's working age population and shows that between 2016 and 2041 Gloucestershire's working age population is projected to increase overall. However, between 2023 and 2031 the county is projected to see a declining working age population. Projections looking beyond 2031 suggest at this point Gloucestershire's working age population will return to a period of overall growth.[23]

[23] Gfirst LIS Five Foundations of Productivity 2019





Source: Jan 2018 – December 2018 Annual Population Survey

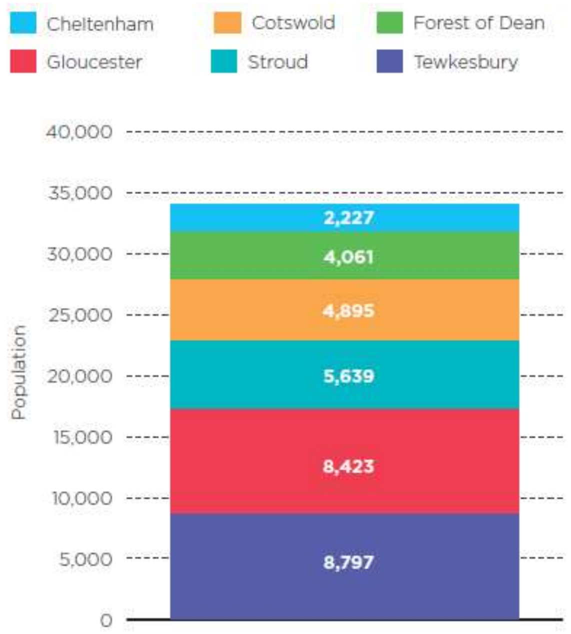
Proportion of White population by district, 2018

Source: LIS Five Foundations of Productivity

Ethnicity data from the Annual Population Survey reveals Gloucestershire has a predominantly White population, although there are differences between the urban and rural areas.

This figure shows that the areas with the highest proportions of ethnic minorities are the two urban districts. This is not particularly notable and follows the trend of much of the rest of the country. However, there is a difference between the two largest urban centres in Gloucestershire, with Gloucester having an 89% White population and Cheltenham a 94% White population. Comparatively, the rural districts each have around a 98% White population, with the Forest of Dean just being highest. This highlights the rural/urban divide in the county, although demonstrates that, like much of the rest of the country, Gloucestershire is not a particularly ethnically diverse area.

Districts Contributions to Gloucestershire Population change 2010-17

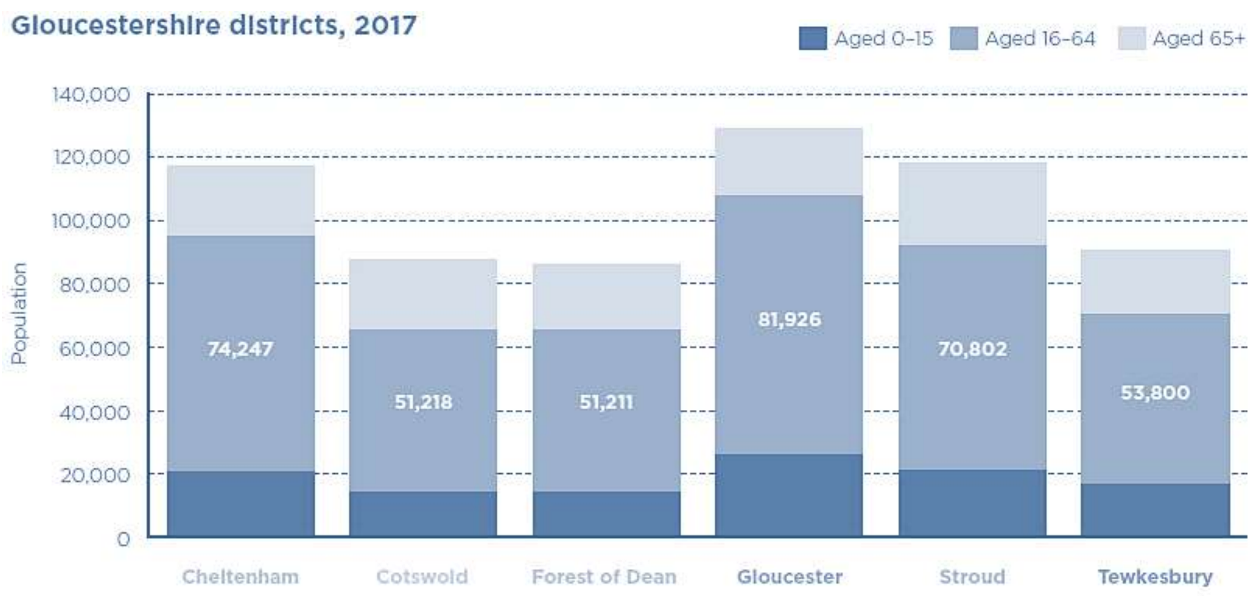


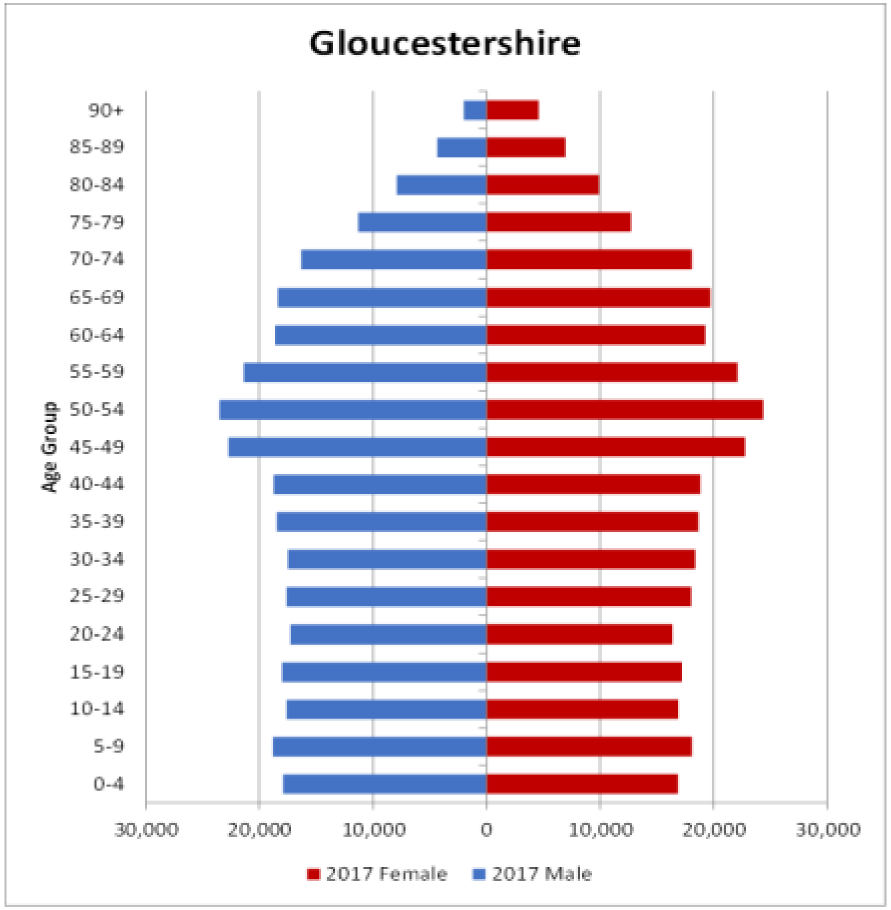
Population growth in Gloucestershire is average and in line with the regional and national rate of growth since 2010. Within this there is a falling share of 16–64-year-olds as a percentage of the total population (2.5%). This fall in share is entirely driven by additional 65+ share growth (2.5%). There is also a net inflow of economically active 30–44-year-olds as well as an inflow of children under the age of 15.

Gloucestershire has a slightly lower percentage of those aged 65+ than the South West region, but the highest share of 50–64-year-olds of all LEP neighbours or comparators. This is driven by a bulge of those aged 50–52 in particular.

People from the EU are the largest non-UK-born demographic and make up between 37% (Cotswold) and 47% (Tewkesbury) of non-UK-born residents in Gloucestershire districts.

Source: LIS Five Foundations of Productivity





Source: Mid-2017 Population estimates, ONS

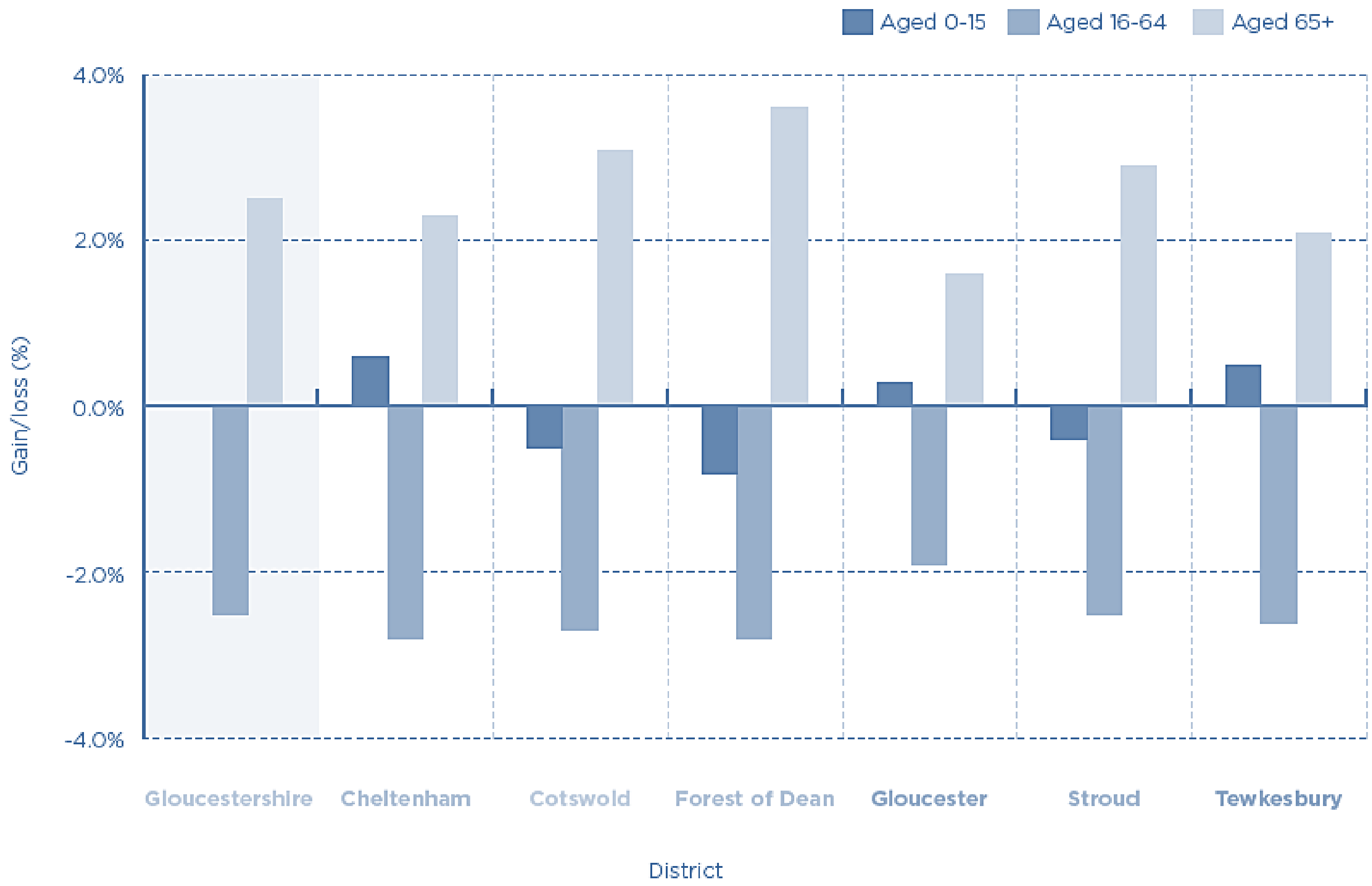
Population change by age (%) 2016 to 2017			
Age Band	Gloucestershire	South West	England and Wales
0-19	0.5%	0.4%	0.4%
20-64	0.5%	0.6%	0.4%
65 and over	2.0%	1.7%	1.5%

Gloucestershire has a lower proportion of 0-19 year olds and 20-64 year olds when compared to the national figure, whilst the proportion of people aged 65+ exceeds the national figure. As is the case in many parts of the UK, the number of older people in the county has steadily increased over the last 10 years. Projections suggest this trend will continue, with the number of people aged 65+ projected to increase by 82,500 or 66.6% between 2014 and 2039. The working age population (aged 20-64) made up 56.4% of the population in Gloucestershire in 2017. This was slightly higher than the figure for the South West but lower than that for England and Wales. As age increases gender differences become more noticeable, with females outnumbering males by an increasing margin.

Gloucester had the highest number of 0-19 year olds (32,157) and Cotswold the lowest number (17,870). Gloucester and Cheltenham had the highest number of 20-64 years olds (75,782 and 68,525 people respectively) and Forest of Dean and Cotswold the lowest (46,931 and 47,561 people respectively). Stroud has the highest number of people aged 65 and over with 26,214 people.

Gloucestershire's 65+ population is projected to experience the greatest growth, increasing by almost 82,500 people or 66.6% by 2039. Gloucestershire's 0-19 year old population is also projected to increase, but at a slower rate of 11.0% or 15,200 people by 2039. The working age population (20-64 year olds) is projected to experience a very small increase of 1.4% or around 5,000 people.

There is shifting demographic in Gloucestershire, with people living longer and young people leaving. A stark regional difference, for example, is that on average Bristol attracts 4,000 young people every year while Gloucestershire loses 400. Based on this statistic by 2039 there will be 79,000 more people over 65, but only 7,000 more people aged 18 to 64, and 4,000 more people under 18.

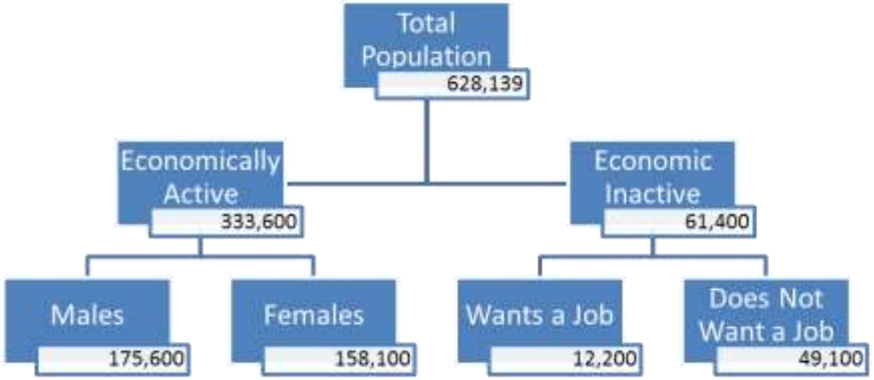


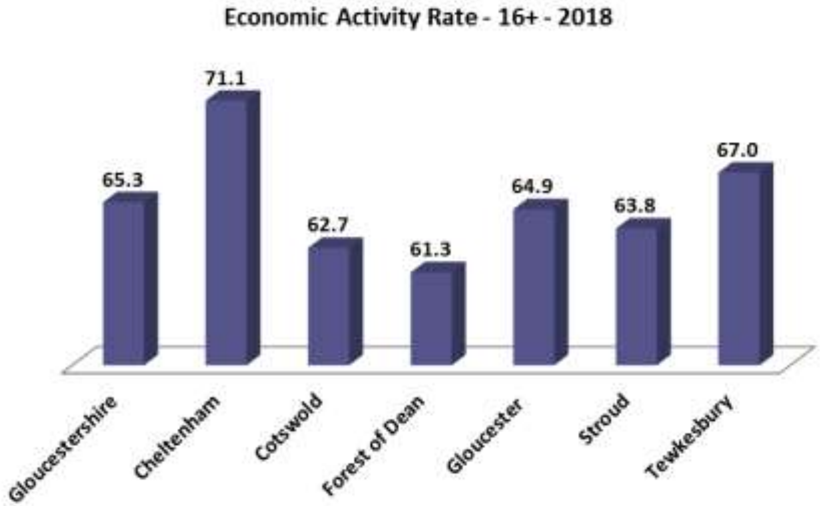
Per Cent +/- gain/loss in population share by age group, Gloucestershire and Districts, 2010-17

Highlights the changing composition of population in terms of the balance of the three broad age groupings:

1. Those aged 0–15 have maintained their share of the total population at 18%; losing a margin of the total share in three districts and gaining a margin of the total share in three others. 2. The share of those aged 16–64 has declined by 2.5% across Gloucestershire, and by as much as 2.8% in Cheltenham and the Forest of Dean. In Cheltenham this has also corresponded to a decrease in the absolute number of residents aged 16–64 (-1,730). 3. Meanwhile, the share of those aged 65+ has grown in all six districts and by an average of 2.5% across the LEP area. The total increase in absolute terms was 22,250.

Economic activity

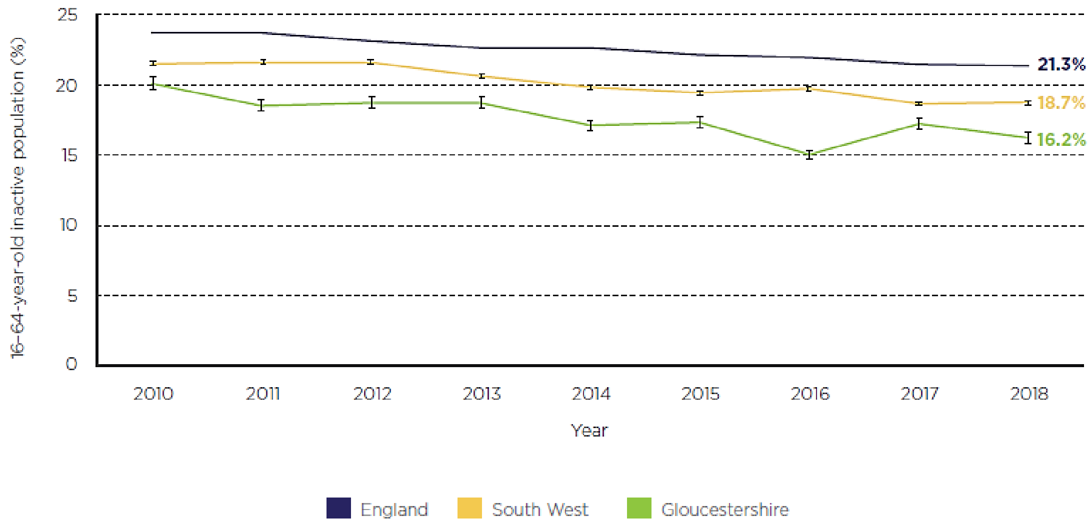




A high economic activity rate indicates a healthy labour market where a large proportion of residents aged 16-64 year are available or potentially available to work.

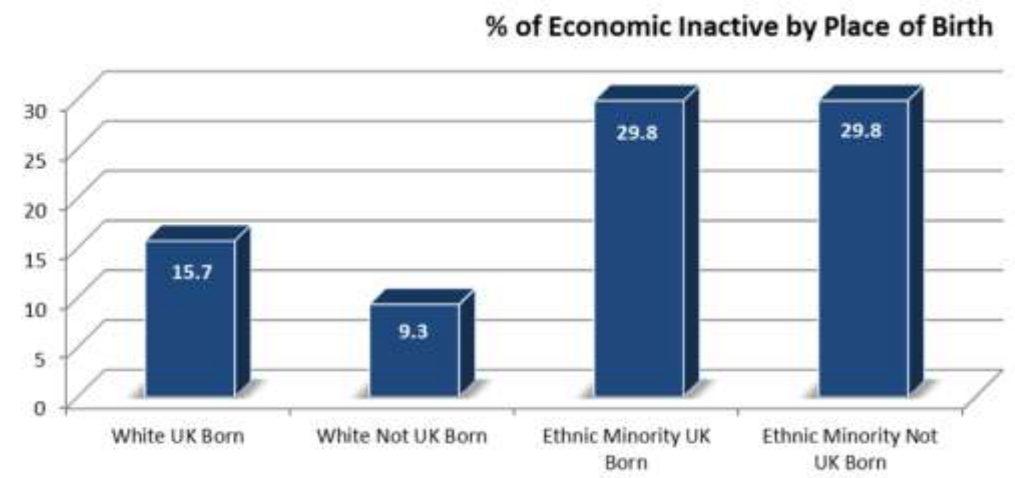
During the period January to December 2018, Gloucestershire had an economic activity rate of 83.8%, which was above both the South West and Great Britain average of 81.3% and 78.5% respectively.

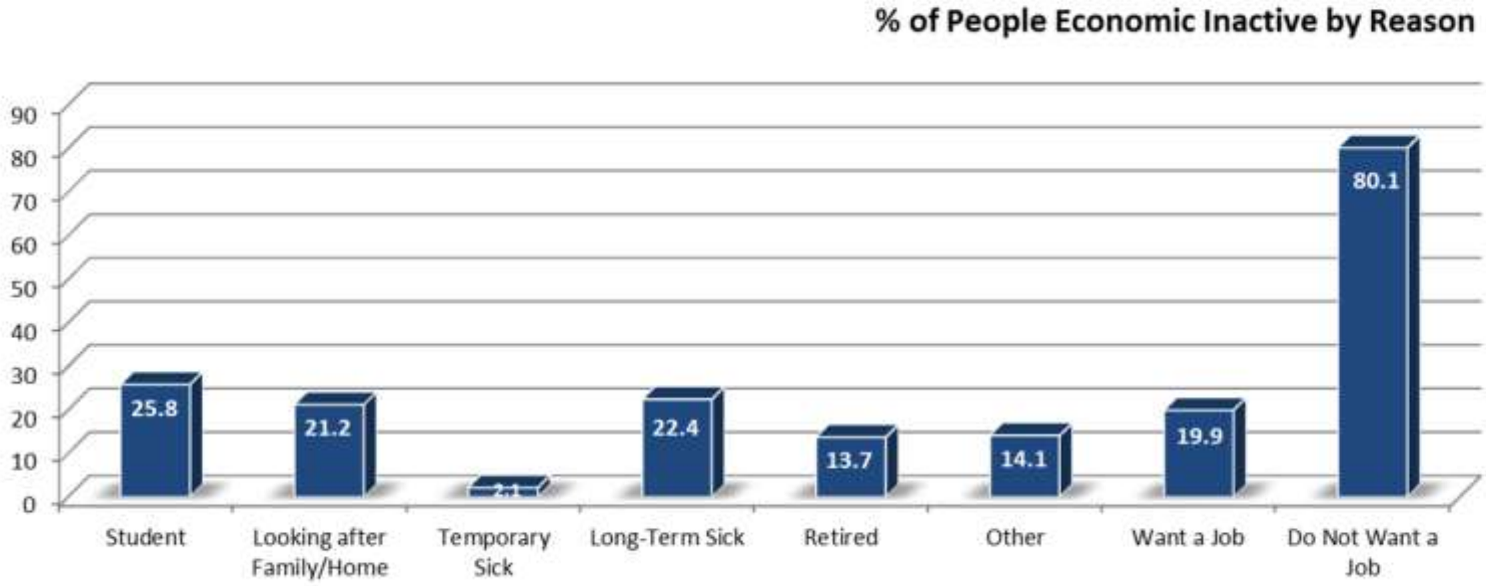
Economic inactivity has declined since 2010, when it stood at 74,800 people or 20.1%. In 2010 the rate stood at 3.6% below the national rate and by 2018 this gap had widened to 4.1% below the national rate of inactivity. A person is defined as being economically active if they are either employed or are unemployed but want to supply their labour to produce goods and services.



Gloucestershire comparative economic inactivity rate, 2010-18

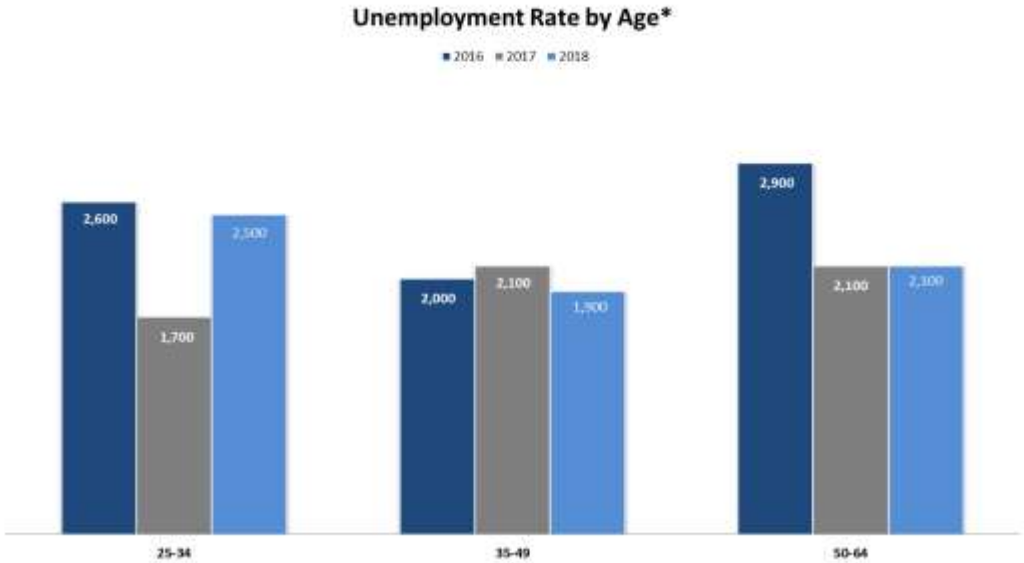
[24] Annual population survey, ONS



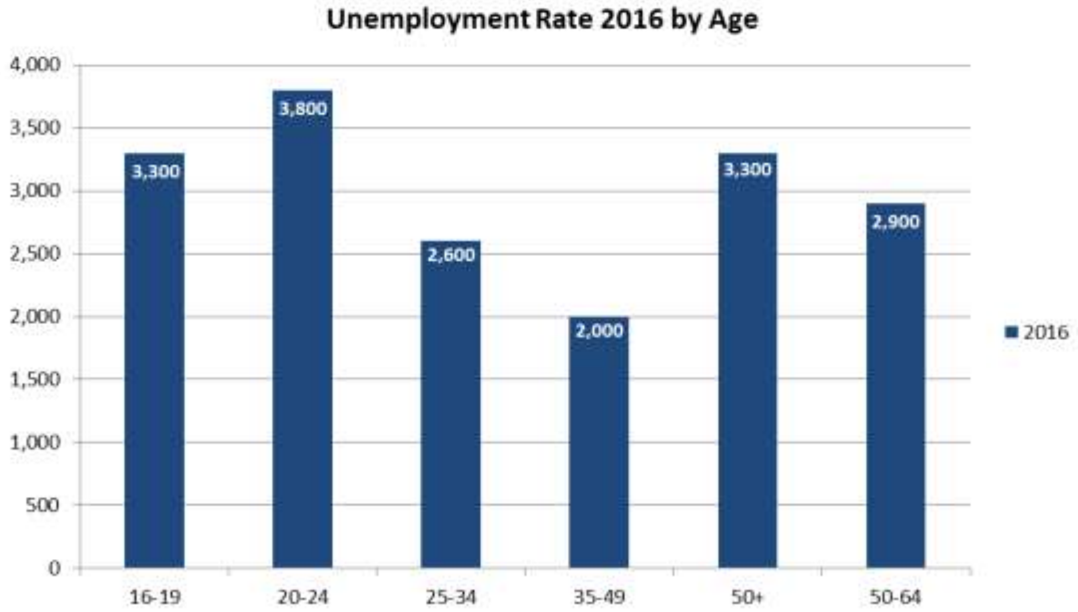


Source: ONS Annual Population Survey Jan 2018 - Dec 2018

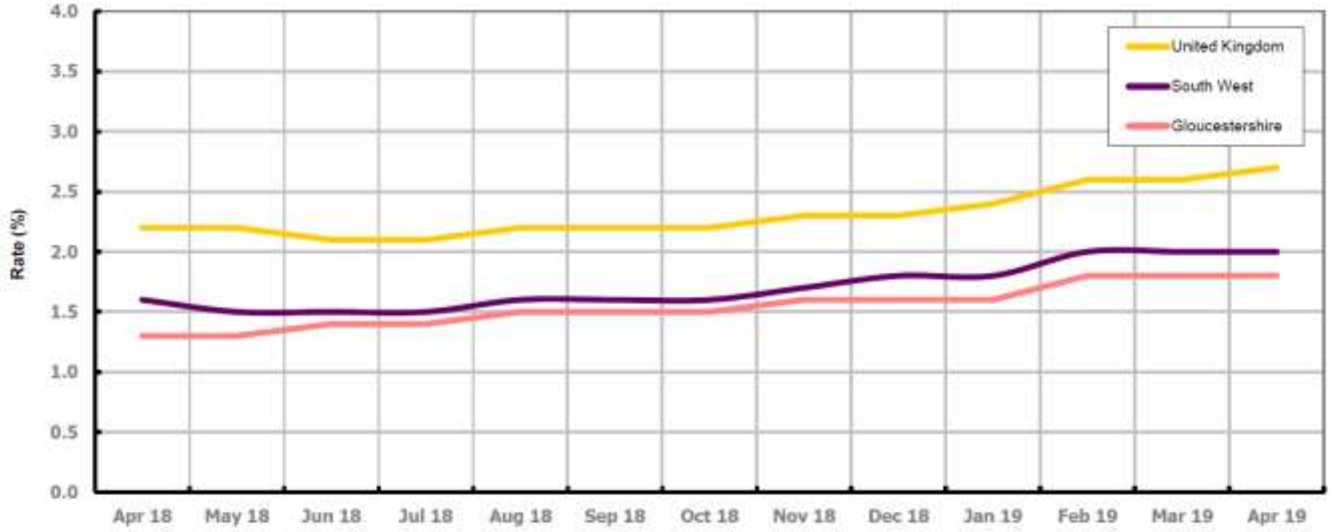
Unemployment



Source: NOMIS Annual Population Survey 2018.*ages 16-19 & 65+ Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).



Claimant Rate



The Gloucestershire rate has been lower than the South West average since December 2015, with the exception of April and May 2016 when it was the same. It has been persistently lower by approximately 0.8% against the UK average.

In April 2019, the number of claimants in Gloucestershire was 1.2% higher than the number in March 2019.

Source: https://inform.gloucestershire.gov.uk/media/2089619/unemployment_bulletin_apr-19.pdf

Area	Claimant Count in April 2019	% change on March 2019	Consecutive months increasing
UK	**1,115,050**	2.1%	9
South West	**67,855**	0.8%	9
Gloucestershire	**6,970**	1.2%	10

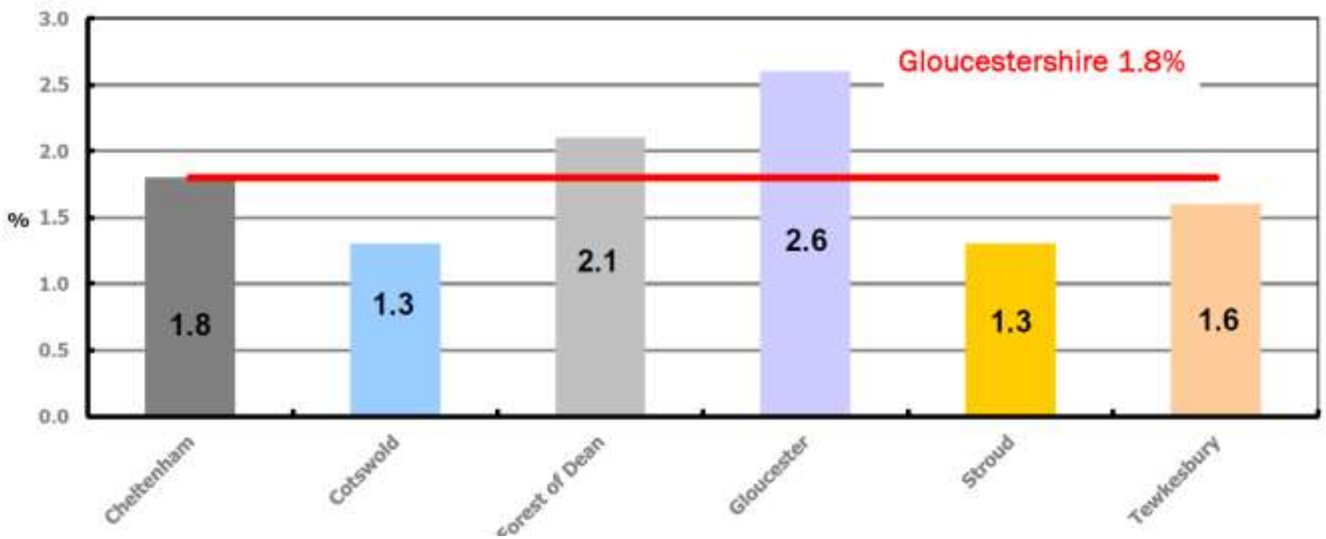
There are two commonly used measures of unemployment. The first is the International Labour Organisation (ILO) measure which is based on national survey data of a sample of the total population. The measure counts all people aged 16 and over without a job who are available to and able to start work. This is classed as the 'official' measure of unemployment.

According to the International Labour Organisation measure there were 13,800 16-64 year old's unemployed in Gloucestershire during the period April 2015 to March 2016. This equates to an unemployment rate of 3.7% which was lower than the national figure of 4.1% and higher than the regional figure of 3.3%36
The second measure of unemployment is the number of people claiming unemployment related benefits, known as the claimant count. This measure is a narrower measure because it only counts those residents who are out of work and qualify for benefits meaning that it can underestimate the true extent of unemployment, however, it does have many benefits as it is more up to date and can be broken down to smaller geographies that allows us to gain a better understanding of the local economy.

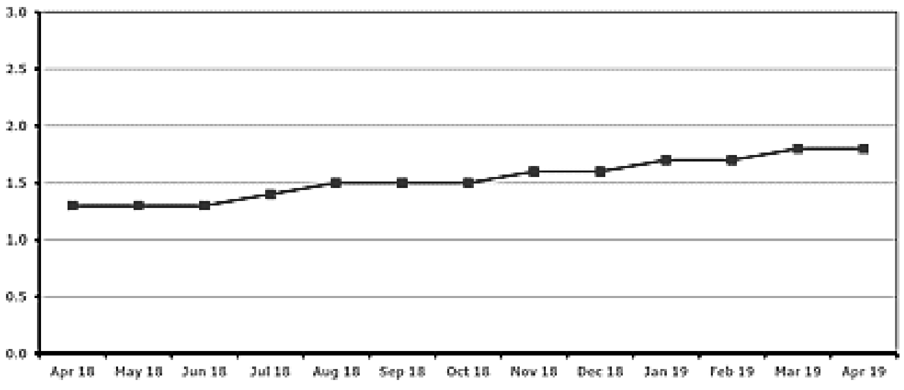
From 1996 until the recent introduction of Universal Credit, this was based on the number of people claiming Jobseeker's Allowance. However, since its introduction some unemployment benefit claimants will be claiming Universal Credit instead. To reflect this change, the Claimant Count has been expanded to include people claiming Jobseeker's Allowance plus those who claim Universal Credit and who are searching for work.

Gloucestershire is in the process of transitioning to full Universal Credit. This means a broader span of claimants will be required to look for work than previously under Jobseekers Allowance. As more people are brought within the coverage of Universal Credit, the Claimant Count is set to rise noticeably over time. This will happen irrespective of how the economy performs and is a feature of the design of Universal Credit which brings additional groups of people into 'Searching for Work' conditionality (and therefore the Claimant Count), to help encourage and support these claimants into work.

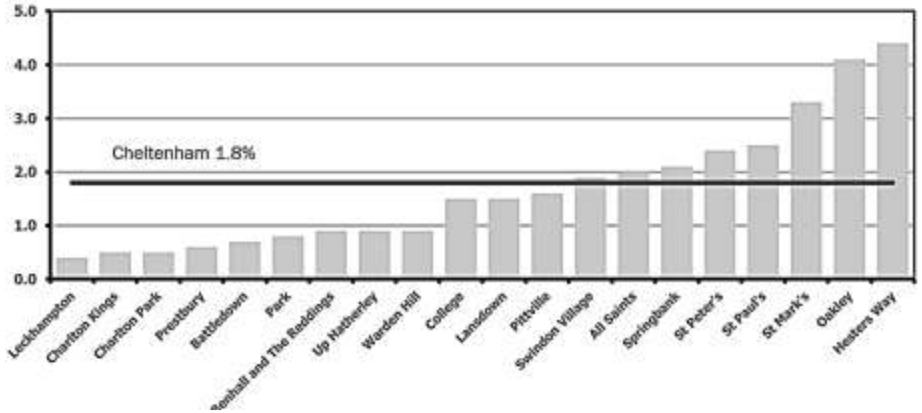
Claimant Rates at District Level:



Cheltenham

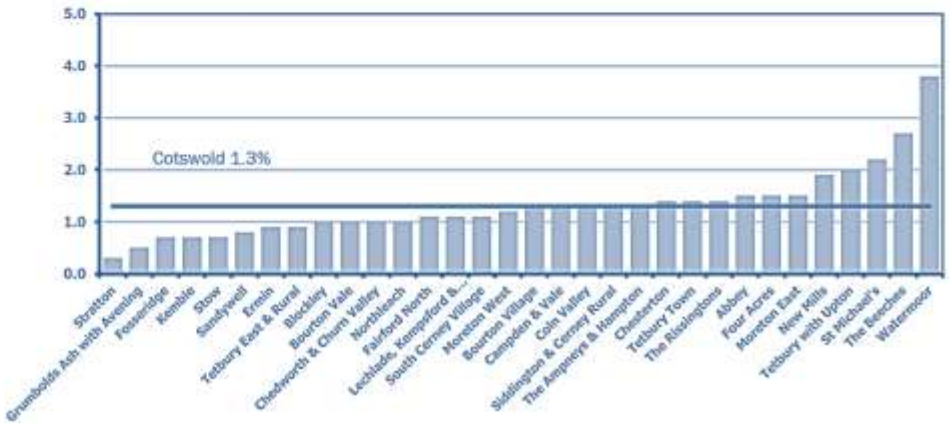


By Ward – April 2019

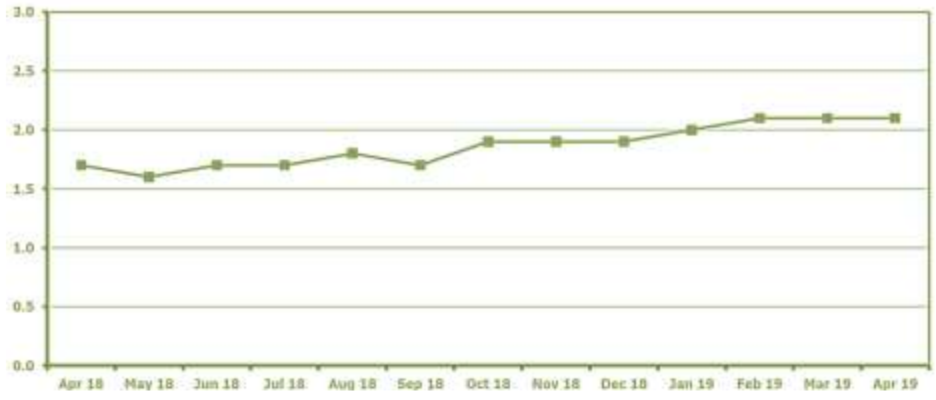


Cotswold

By Ward - April 2019



Forest of Dean



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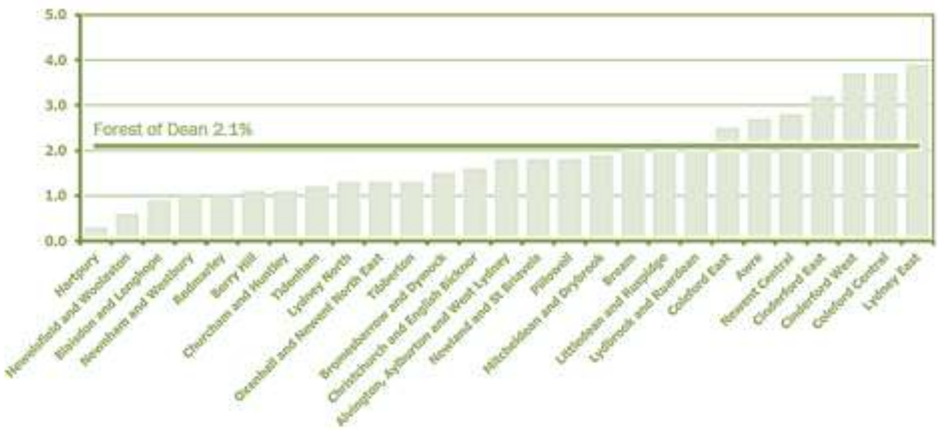
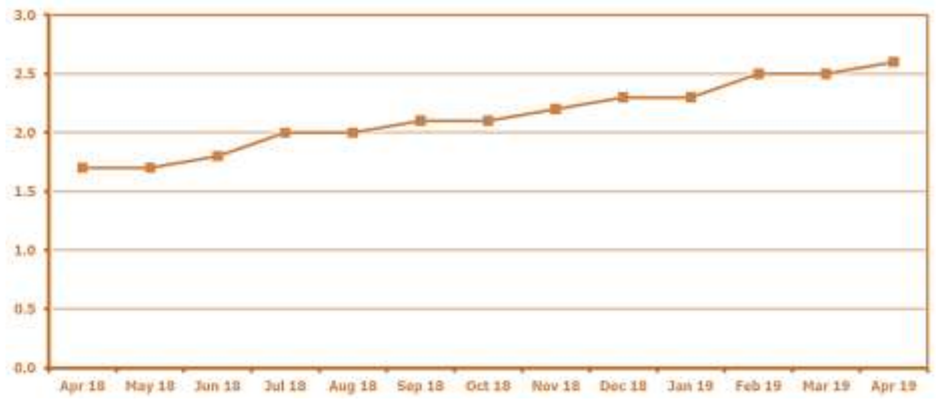


Gloucester



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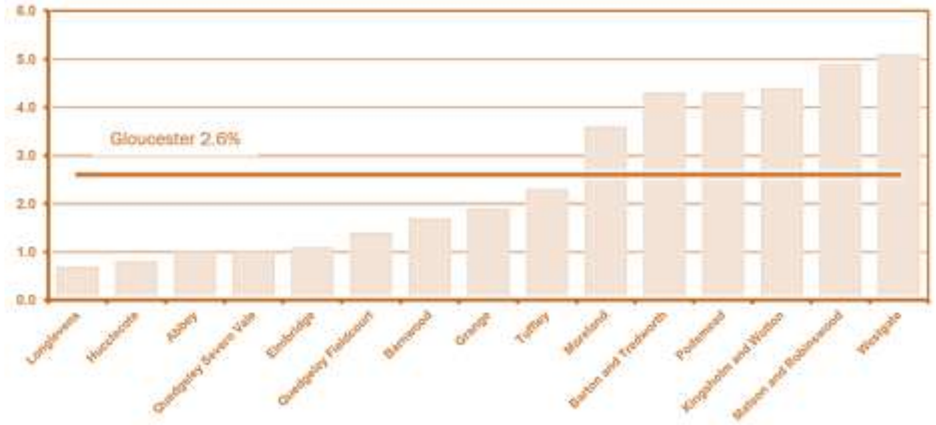
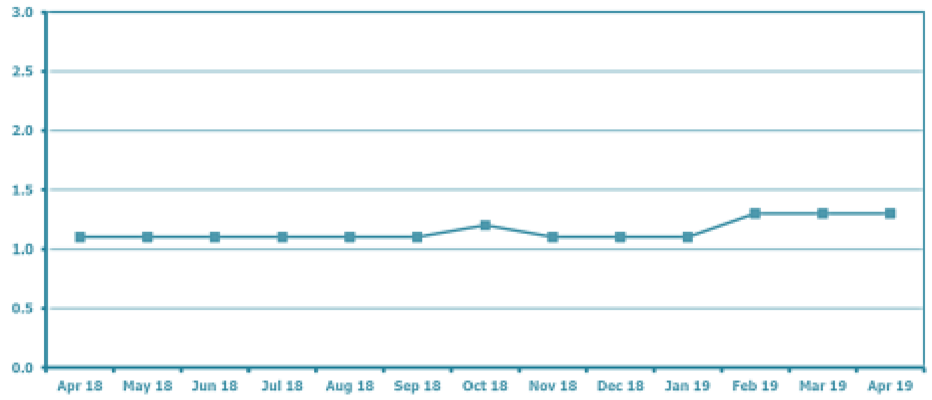
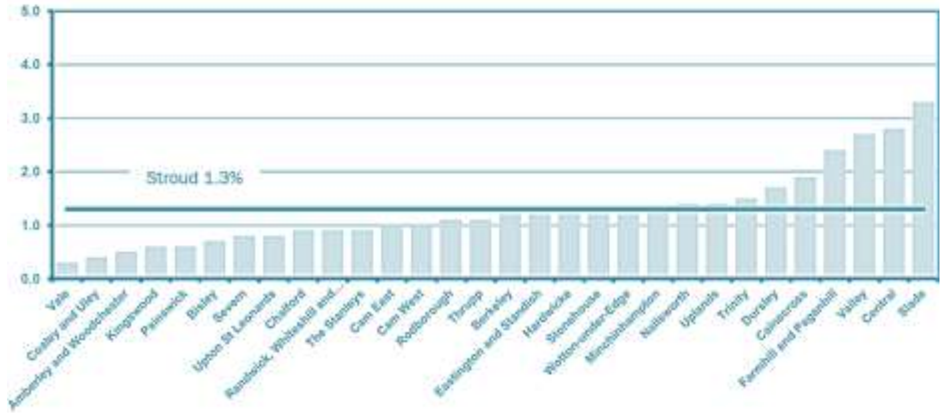


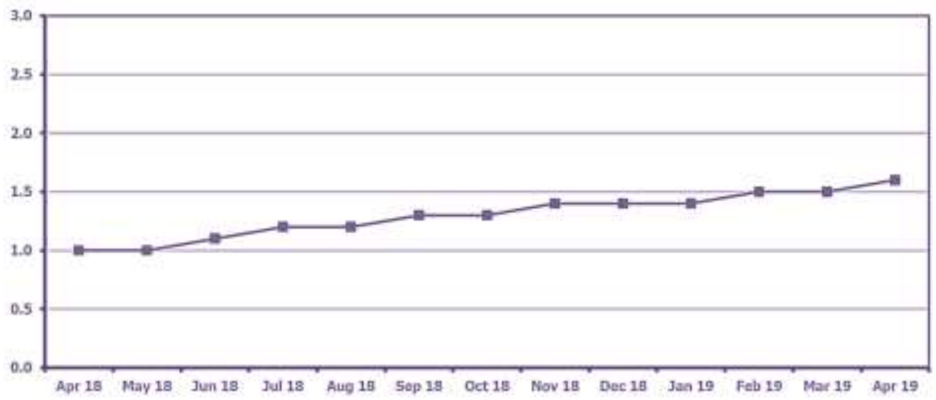
Stroud



By Ward – April 2019



Tewkesbury



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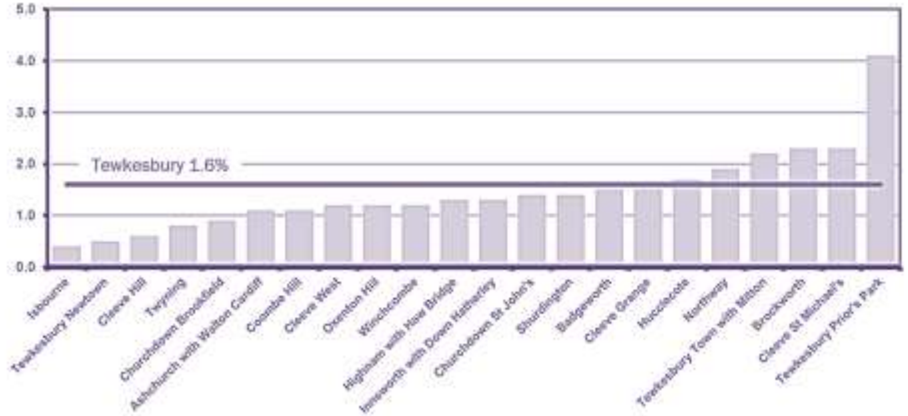
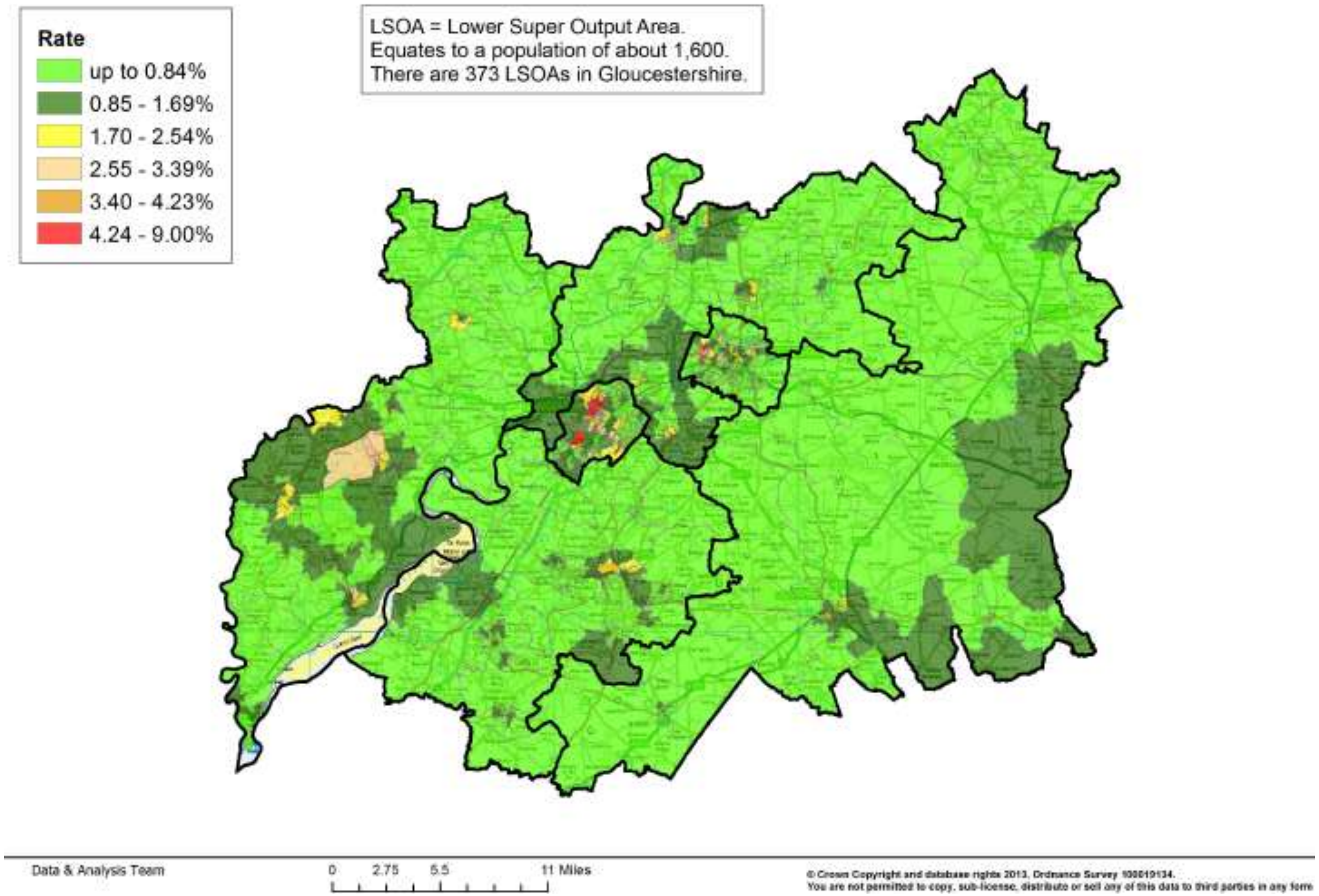
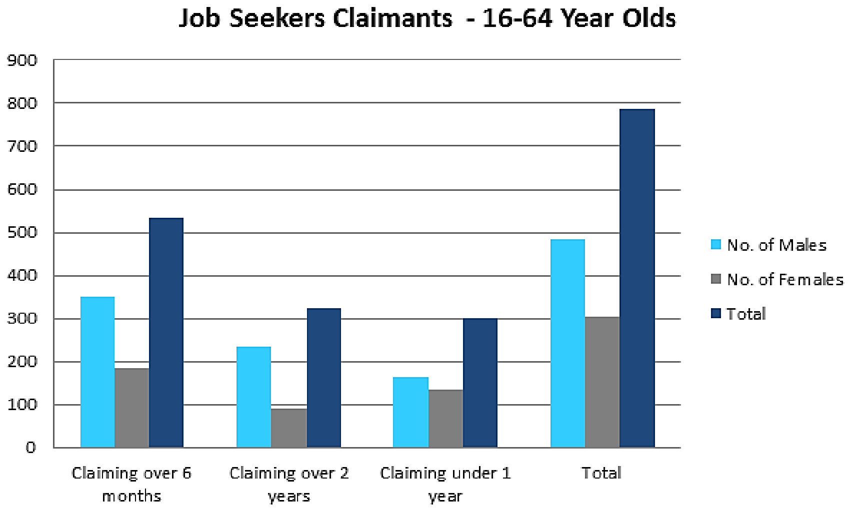
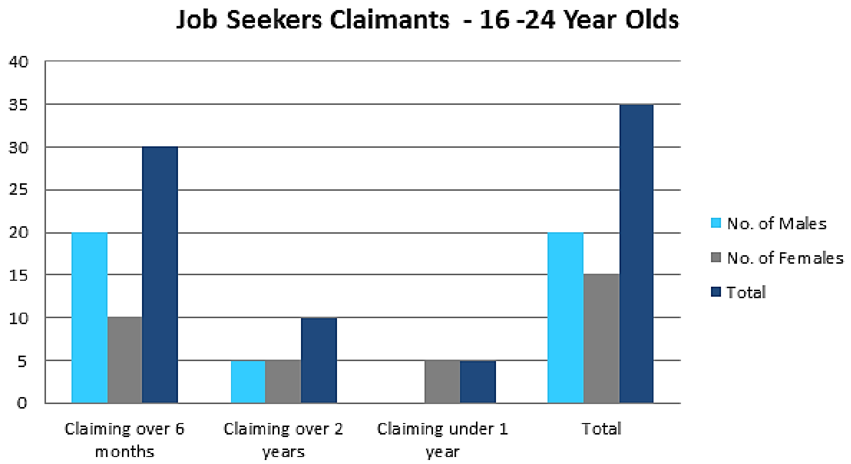


Claimant Count Rate by LSOA in Gloucestershire, April 2019



Long Term Unemployment



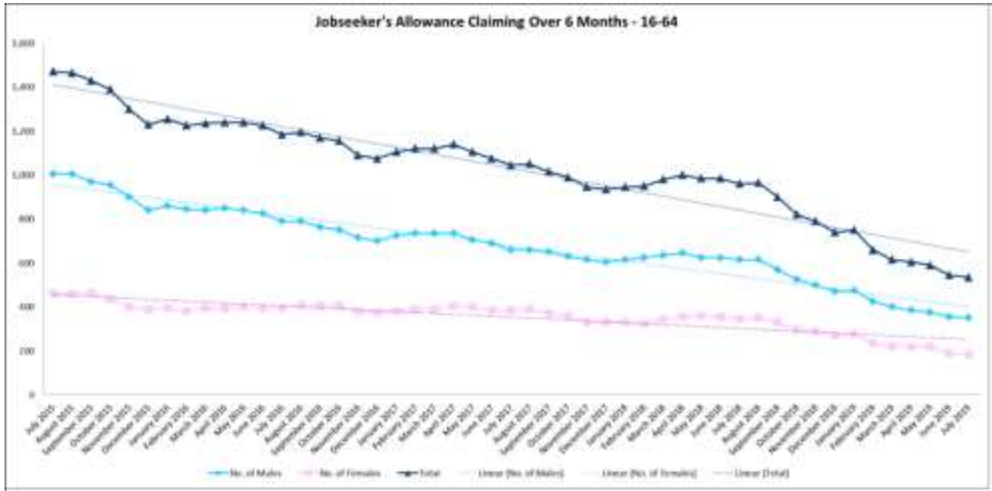


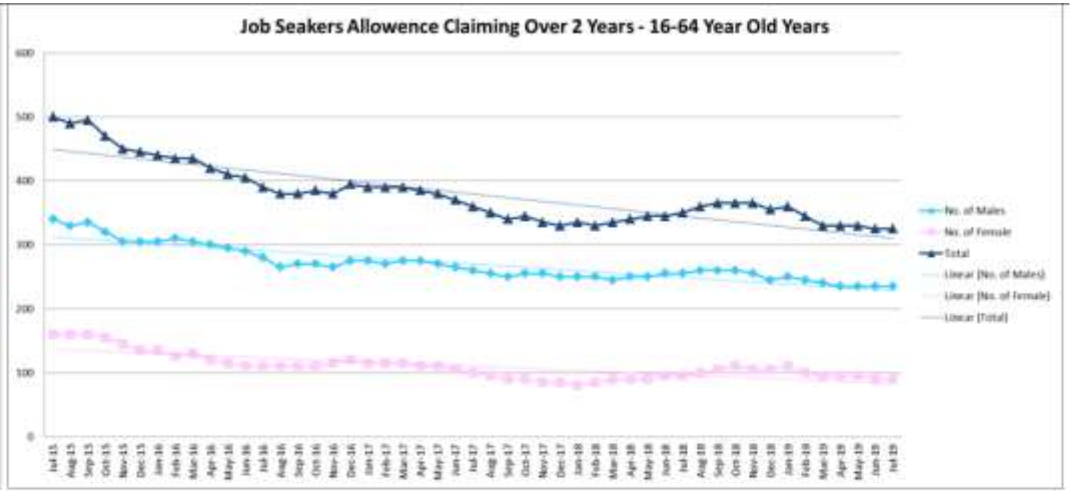
Source: Nomis - Claimant period to July 19

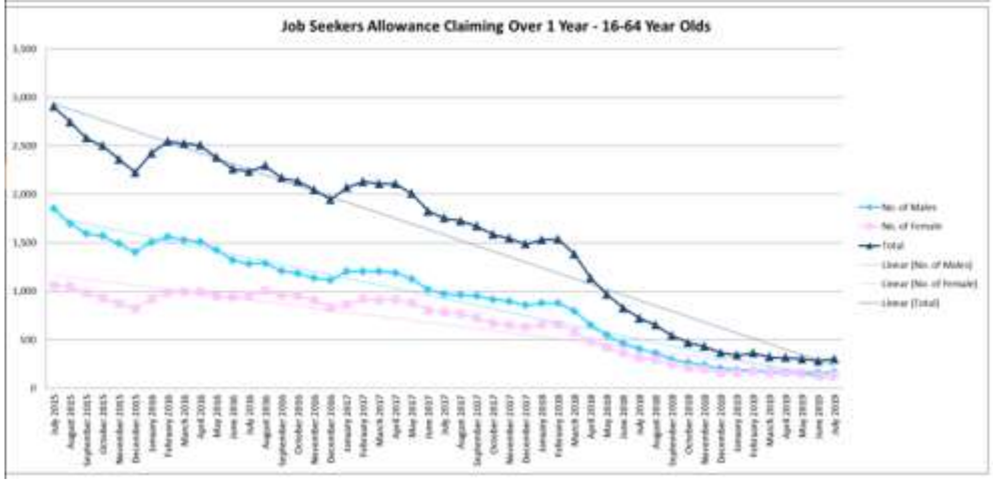
Long term unemployment can lead to a loss of skills and the motivation to work, and can result in individuals being permanently excluded from the labour market.

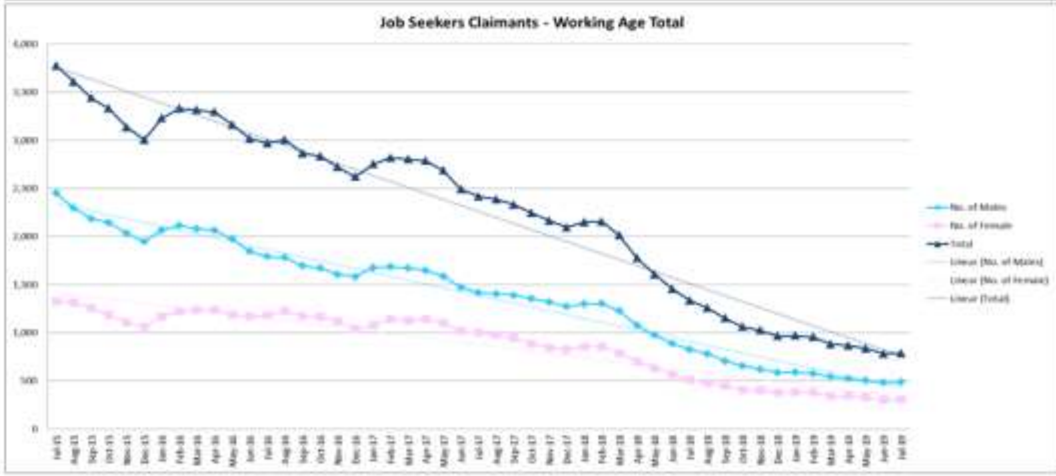
Gloucestershire shows a higher proportion of long term unemployed than the South West. This is in contrast to the overall claimant count, which shows the total claimant count rate in Gloucestershire and the South West to be very similar.

Long-term unemployment can plausibly affect individuals, families, and communities in direct ways. When individuals are out of work, their skills may erode through lack of use. That erosion or "depreciation of human capital" increases as time passes, meaning that the potential wages the unemployed can earn on finding a new job and even the chances of finding a new job decrease the longer they are out of work. Similarly, being out of work may reduce a worker's "social capital"—the network of business contacts that make finding new and good jobs easier. Long-term unemployment can also influence outcomes indirectly. While a worker is unemployed, that worker's family income falls due to the lack of earnings, and that loss of income (which becomes larger as unemployment is longer) can affect the worker and the worker's household. The loss of income can reduce the quantity and quality of goods and services the worker's family can purchase. Further, dealing with the loss of income can exacerbate stress. if many workers in the same geographic area are experiencing long-term unemployment, their communities could suffer because of an increase in demand for public services and a decrease in the tax base used to fund those services.

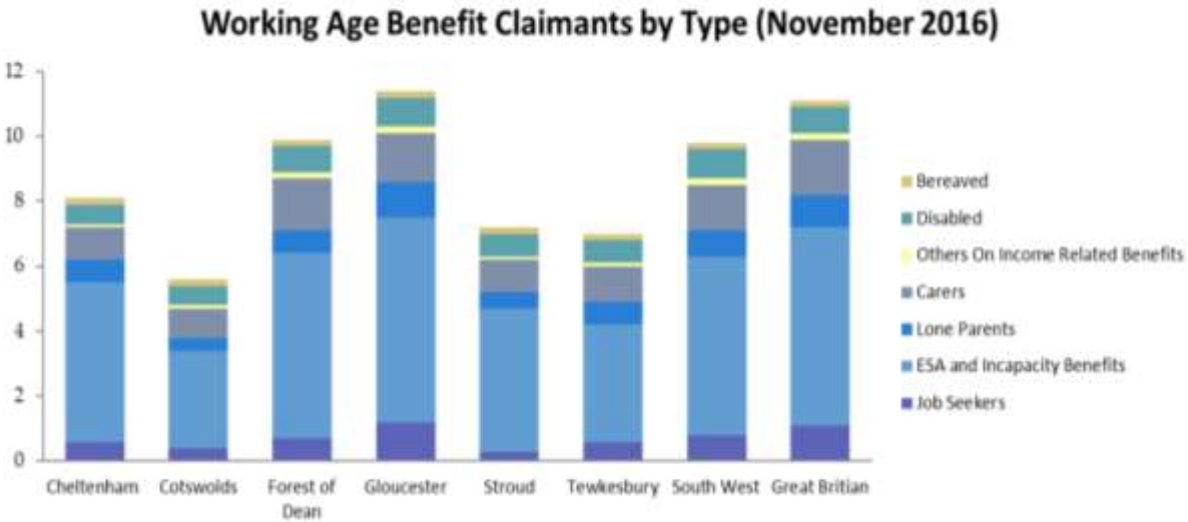




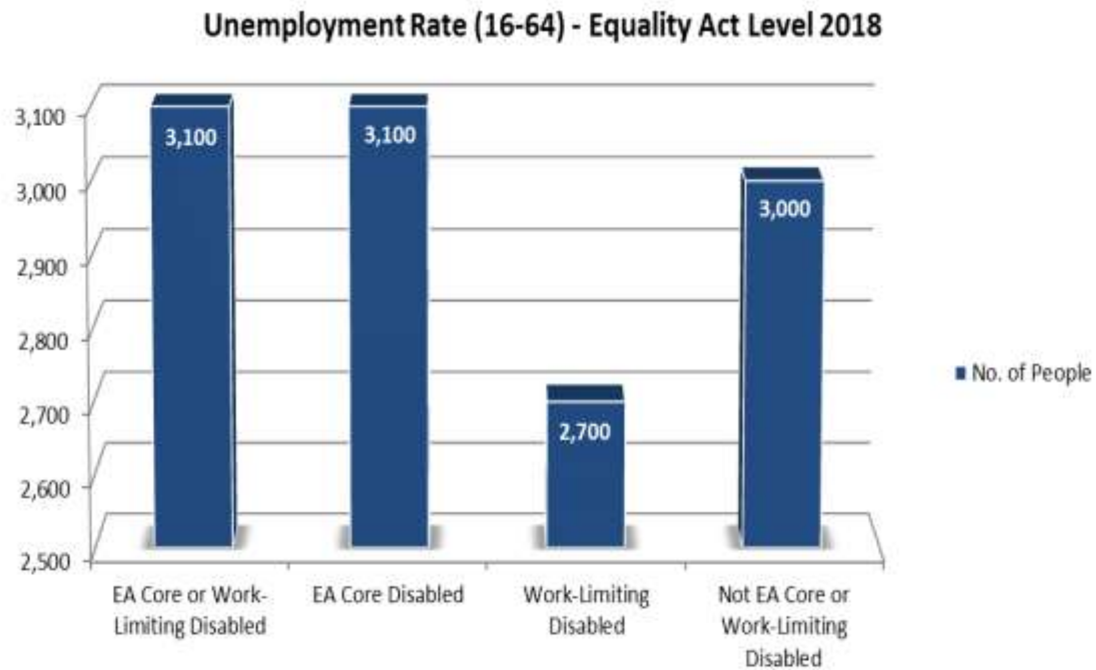




The Gloucestershire rate has been lower than the South West average since December 2015, with the exception of April and May 2016 when it was the same. It has been persistently lower by approximately 0.8% against the UK average. Gloucestershire is in the process of transitioning to full Universal Credit. This means a broader span of claimants will be required to look for work than previously under Jobseekers Allowance. As more people are brought within the coverage of Universal Credit, the Claimant Count is set to rise noticeably over time. This will happen irrespective of how the economy performs and is a feature of the design of Universal Credit which brings additional groups of people into ‘Searching for Work’ conditionality (and therefore the Claimant Count), to help encourage and support these claimants into work.



Source: mid-year population estimates, not seasonally adjusted (Discontinued) (November 2016)



The 2011 Census found that people in Gloucestershire with a long-term limiting illness or disability were more likely than people without such illnesses or disabilities to be providing unpaid care, to be living in a household without access to a car or van and to be living in social housing. Amongst people aged 25 or over, people with long-term limiting illnesses or disability were more likely than others to have never worked and to be in routine occupations and were less likely to be in managerial positions.

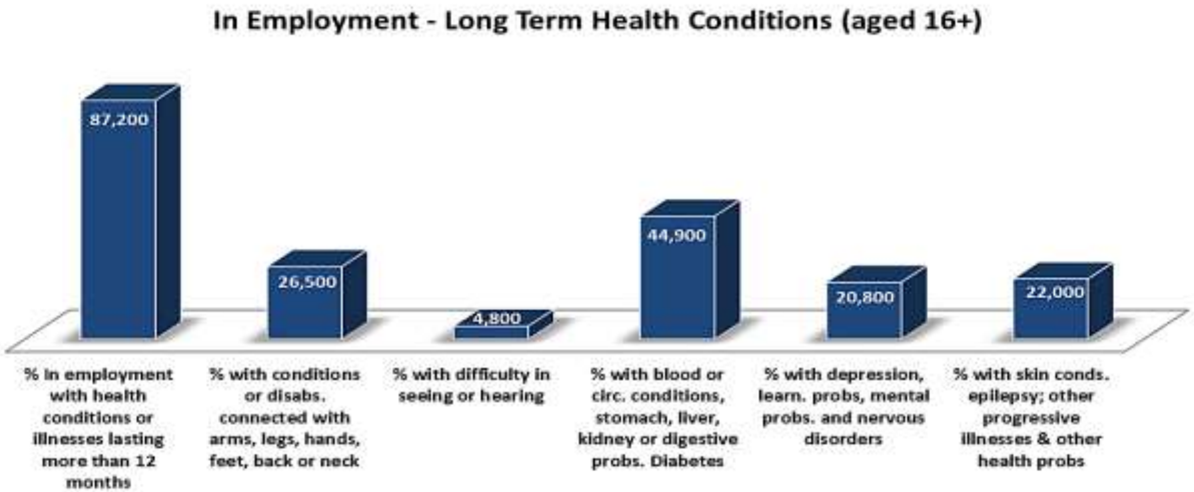
Estimated projections suggest that in 2019 there will be approximately 11,825 people aged 18+ living with a learning disability in Gloucestershire equating to 2.3% of the adult population. Of this group, about 2,400 are estimated to have moderate or severe learning disabilities, equating to 0.5% of the adult population.

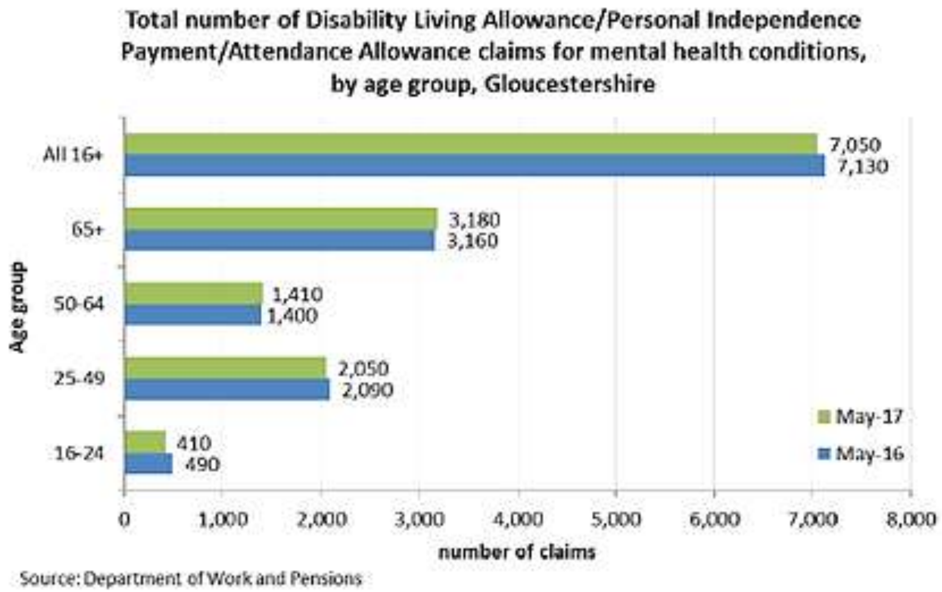
With regards to children, 4,955 school pupils in Gloucestershire (5.2% of school pupils) were known to have a learning disability in 201813. Of these children, 4,224 had a moderate learning disability and 574 had a severe learning disability.

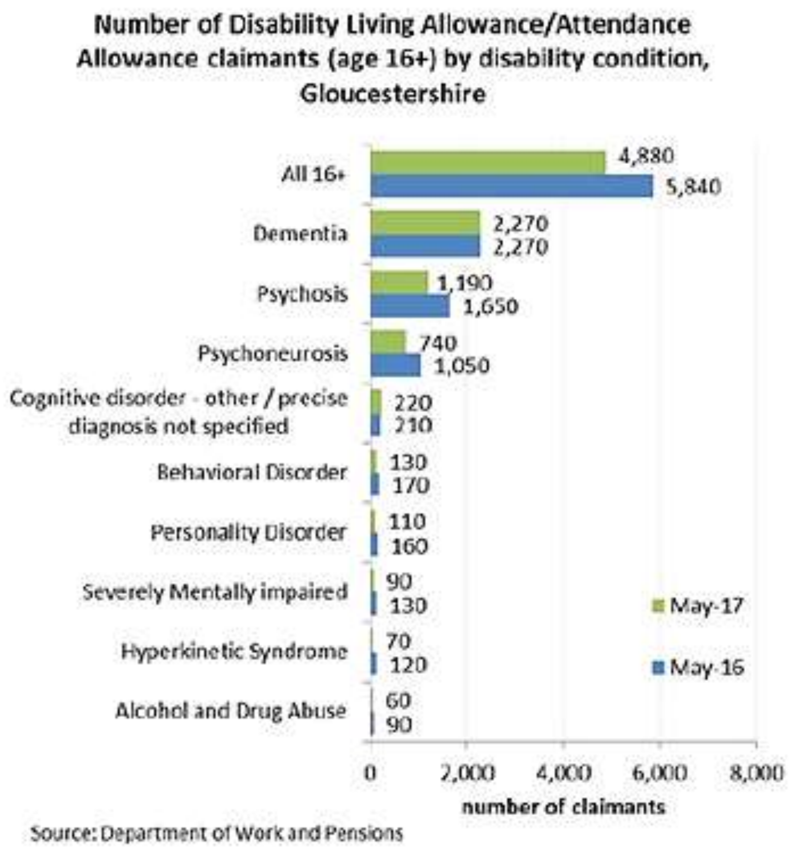
The Forest of Dean had the highest proportion of residents reporting a long term limiting health problem at 19.6% of the total population, and was the only district that exceeded the national figure. Cheltenham had the lowest proportion of residents reporting a long-term limiting health problem at 15.1%. At ward level, Coleford Central in the Forest of Dean had the highest proportion (25.7%), followed by Podsmead in Gloucester (24.4%); Ashchurch with Walton in Tewkesbury had the lowest proportion (7.6%) followed by Rissingtons in Cotswold (10.0%).

An estimated 11,900 people aged 18 and over in Gloucestershire will have a learning disability in 2020. Of these, 2,420 have a moderate or severe learning disability. There were 3,623 people in Gloucestershire diagnosed by local GPs as having a learning disability in 2017/18. While the overall number of adults with moderate or severe learning disability is predicted to rise by 5.8% between 2020 and 2030, the number is predicted to rise most steeply in the older age group, rising by 25.6% for the over-65s in the same period. The PANSI and POPPI models predicts that in 2020, around 6,300 adults in Gloucestershire had Autistic Spectrum, and the number is expected to rise to nearly 7,000 in 2030. About half of these may have a learning disability. Down's syndrome is affecting around 260 adults in 2020, who will have some degree of learning disability. Although challenging behaviour is not a learning disability, people with a learning disability are more likely to show challenging behaviour. It was estimated that in 2020, around 170 adults aged 18 and over in Gloucestershire will have challenging behaviour. Many people with a learning disability have complex need. People with learning disabilities are ten times more likely to have a vision impairment compared to the general population. Approximately 40% of people with learning disabilities have a hearing impairment, with people with Down's syndrome at a particularly high risk of developing vision and hearing loss.

In May 2018, 3,224 received the care component of Disability Living Allowance or Attendance Allowance, or the daily living component of Personal Independence Payment for learning difficulties. Nearly 60% of them were awarded the higher rate, meaning that they required high levels of long-term personal care support, i.e. attention in connection with their bodily functions and/or continual supervision to avoid substantial danger to themselves or other. Nationally, carers providing learning disability support are more likely than other carers to be providing care for 100 or more hours of care per week; just under a half provide this level of care. Over half of carers caring for people with a learning disability have a long-standing illness or disability themselves. With regards to quality of life, carers providing learning disability support are more likely than other carers to have concerns about their personal safety with just under a fifth having such concerns. Carers providing learning disability support are amongst the least likely to say they get encouragement and support. Just over three quarters have some difficulties doing things they value or enjoy and just over three-fifths do not have enough social contact.



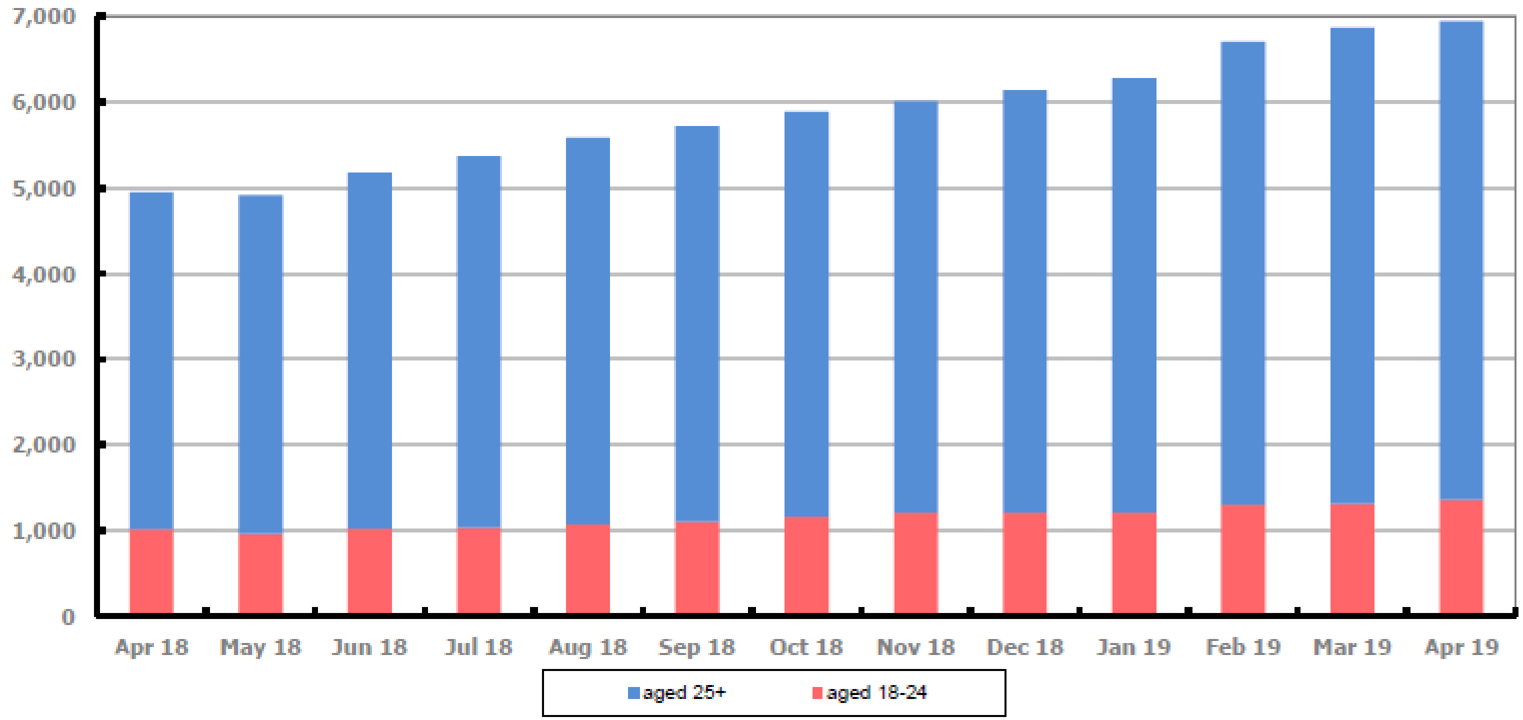




A total of 7,100 people were claiming a disability benefit for a mental health condition in August 2018; 3,770 of these claimants were age 16-64 and 3,330 were 65 or over. The most common condition claimed for was dementia, followed by psychoneurosis (depression/anxiety/stress) and psychosis. People claiming for dementia were commonly receiving the high level care component of disability benefits, confirming that this group are likely to have a high level of care needs.

The number of adults in Gloucestershire diagnosed by local GPs with depression increased from 31,300 people in 2013/14 to 47,600 people in 2017/18. The POPPI model predicts that in 2020 around 12,100 people in Gloucestershire aged 65 or over will have depression and this number is predicted to rise to 15,200 by 2030 as the population ages

Youth Unemployment



In April 2019, 1,355 people aged 18-24 were claiming Job Seekers Allowance and Universal Credit who were not in work in Gloucestershire, this represents 19.4% of total working age claimants.

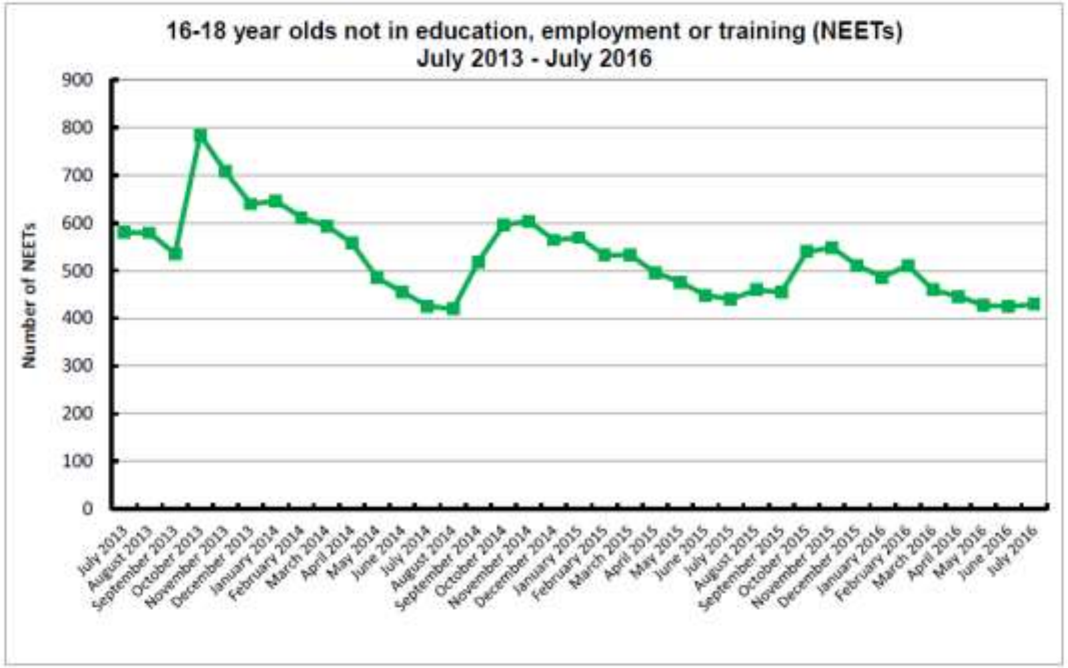
Recruitment of Young People:

Over one in four employers in the LEP area (29 per cent) recruited at least one education leaver in the two to three years preceding the survey, in line with the England-wide figure (27 per cent). Specifically:

- Nine per cent had recruited a 16 year-old school leaver (similar to the England average of eight per cent);
- 10 per cent had recruited a 17-18 year old school leaver (similar to the England average of 11 per cent);
- 14 per cent had recruited a 17-18 year old college leaver (similar to the England-wide figure of 12 per cent);
- 13 per cent had recruited someone from a university or HEI (similar to the England-wide figure of 14%).[25]

[25] LMI Summary UKCES Working Futures 2012-2022

NEETs (16-18 Year Olds)



April 2019 NEET data

	Cheltenham	Cotswold	Forest	Gloucester	Stroud	Tewkesbury	Total
Total NEET	78	29	48	105	53	37	350
Cohort	2489	1980	1945	3490	2966	2076	14946
% NEET	3.13	1.46	2.47	3.01	1.79	1.78	2.52*

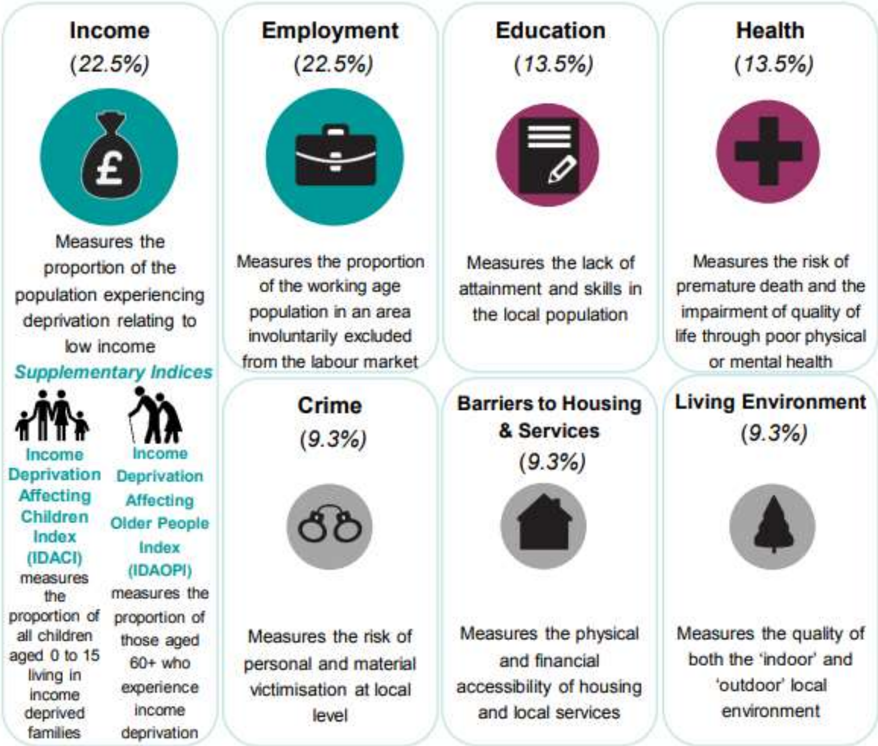
"NEETs" are 16-18 year olds who are not in education, employment or training, and include young people actively seeking education, employment or training as well as those young people who are either not yet ready or who are unable to access these opportunities because of their personal circumstances.

At the end of April 2018 there were 385 young people aged 16-18 not in education, employment or training in Gloucestershire. Young people who face periods of inactivity and unemployment also find themselves further disadvantaged in later life as they struggle to make up the difference from their early social and economic experiences. In addition to the social and economic disadvantage, youth unemployment also has a scarring impact on the mental health and wellbeing of those affected. Compounding these challenges is the difficulty in identifying those young people who become long-term NEET or who are hidden NEETS as they miss out on accessing the support they need the most.

Source: https://inform.gloucestershire.gov.uk/media/2089619/unemployment_bulletin_apr-19.pdf
(*) Adjustment includes a proportion of young people aged 16-18 whose outcomes are not known to Gloucestershire Youth Support Team.

Deprivation

There are 7 domains of deprivation, which combine to create the Index of Multiple Deprivation (IMD2019):



District	IMD Rank 2019 (out of 317 authorities, 1 most deprived)	Quintile (Q1 most deprived)	IMD Rank 2015 (out of 326 authorities)	2015 Quintile (Q1 most deprived)
Cheltenham	237	Q4	228	Q4
Cotswold	272	Q5	267	Q5
Forest of Dean	143	Q3	155	Q3
Gloucester	138	Q3	139	Q3
Stroud	279	Q5	281	Q5
Tewkesbury	261	Q5	262	Q5

[26]

Index of Multiple Deprivation			Rank (of 32,844)		
10% Most Deprived LSOAs	Ward	Local Authority Area	2015	2019	Difference
Gloucester 009E	Podsmead	Gloucester	503	621	118
Gloucester 011A	Matson and Robinswood	Gloucester	902	735	-167
Gloucester 004B	Westgate	Gloucester	360	1,183	823
Gloucester 002C	Kingsholm and Wotton	Gloucester	1,239	1,456	217
Gloucester 004F	Westgate	Gloucester	1,618	1,579	-39
Cheltenham 005C	St. Marks	Cheltenham	2,101	2,178	77
Gloucester 008E	Moreland	Gloucester	1,883	2,221	338
Cheltenham 004C	St. Paul's	Cheltenham	2,413	2,368	-45
Forest of Dean 004C	Cinderford West	Forest of Dean	4,540	2,729	-1811
Gloucester 012D	Tuffley	Gloucester	3,721	2,801	-920
Gloucester 008C	Matson and Robinswood	Gloucester	2,842	2,948	106

Gloucestershire is a mixed area in terms of the Index of Multiple Deprivation. Some parts, in Cheltenham and some more rural areas, are less deprived, while there are some areas, mainly in Gloucester and Cheltenham, which are very deprived. Deprivation is linked to productivity through under-training of the workforce, a reduction in life expectancy and underemployment, among other links. Out of 151 Upper Tier Local Authorities, Gloucestershire is ranked 126th (1 being most deprived) placing the county in the lowest quintile of overall deprivation. This is directly comparable with the 2015 ranking of 124th. In relation to the other authorities in England, Cheltenham BC and Cotswold DC have a lower deprived ranking than in 2015 but Forest of Dean DC have experienced a higher ranking of deprivation in 2019. The rankings of the remaining three authorities of Gloucestershire have stayed relatively the same.

In 2015, the county had 13 LSOAs in the 10% most deprived nationally for overall deprivation. In 2019 Gloucestershire has 12 LSOAs in the same bracket.

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[26] https://ocsi.uk/indices-of-deprivation/

Cheltenham

Deprivation Domains

222 Income Rank
215 Employment Rank
258 Education, Skills & Training Rank
166 Health & Disability Rank
162 Crime Rank
250 Living Environment Rank
244 Barriers to Housing & Services
213 IDACI Rank
240 IDAOPI Rank

Cotswold

Deprivation Domains

278 Income Rank
295 Employment Rank
269 Education, Skills & Training Rank
283 Health & Disability Rank
310 Crime Rank
146 Living Environment Rank
53 Barriers to Housing & Services
277 IDACI Rank
278 IDAOPI Rank

Forest of Dean

Deprivation Domains

151 Income Rank
122 Employment Rank
91 Education, Skills & Training Rank
203 Health & Disability Rank
287 Crime Rank
94 Living Environment Rank
146 Barriers to Housing & Services
165 IDACI Rank
156 IDAOPI Rank

Gloucester

Deprivation Domains

129 Income Rank
135 Employment Rank
85 Education, Skills & Training Rank
79 Health & Disability Rank
175 Crime Rank
244 Living Environment Rank
136 Barriers to Housing & Services
111 IDACI Rank
152 IDAOPI Rank

Stroud

Deprivation Domains

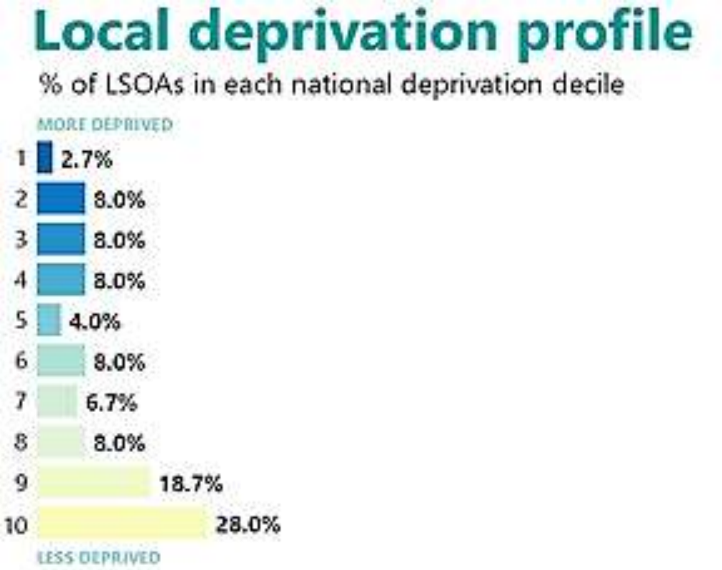
235 Income Rank
224 Employment Rank
263 Education, Skills & Training Rank
239 Health & Disability Rank
298 Crime Rank
215 Living Environment Rank
219 Barriers to Housing & Services
256 IDACI Rank
244 IDAOPI Rank

Tewkesbury

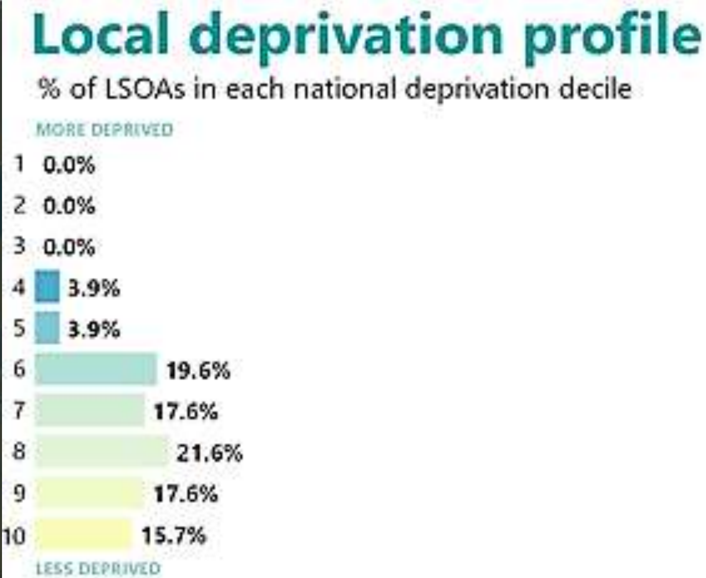
Deprivation Domains

242 Income Rank
252 Employment Rank
215 Education, Skills & Training Rank
236 Health & Disability Rank
289 Crime Rank
205 Living Environment Rank
121 Barriers to Housing & Services
224 IDACI Rank
262 IDAOPI Rank

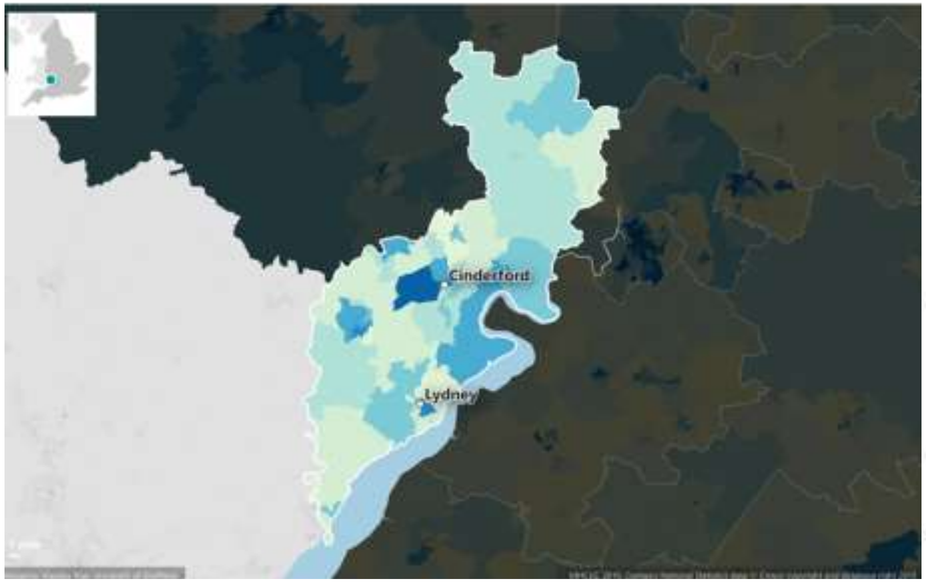
CHELTENHAM

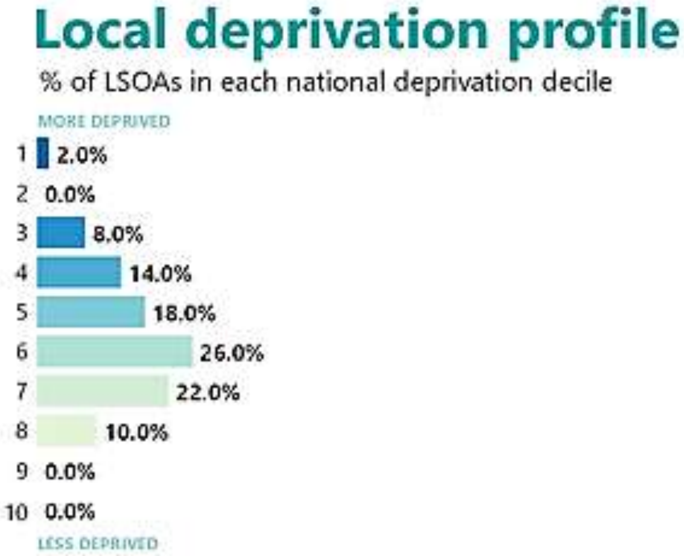


COTSWOLD

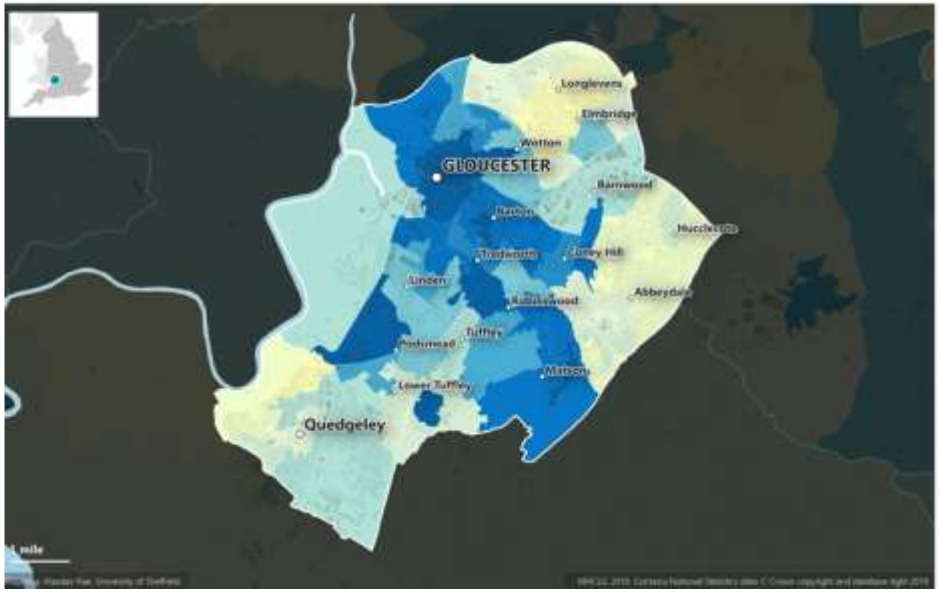


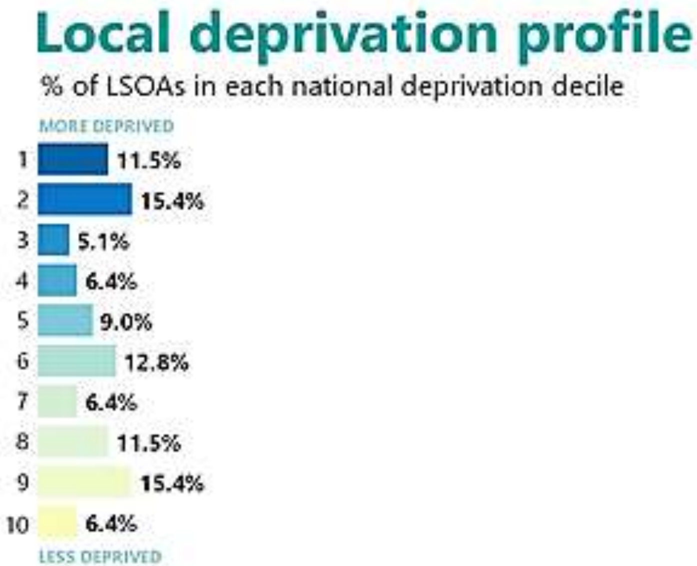
FOREST OF DEAN



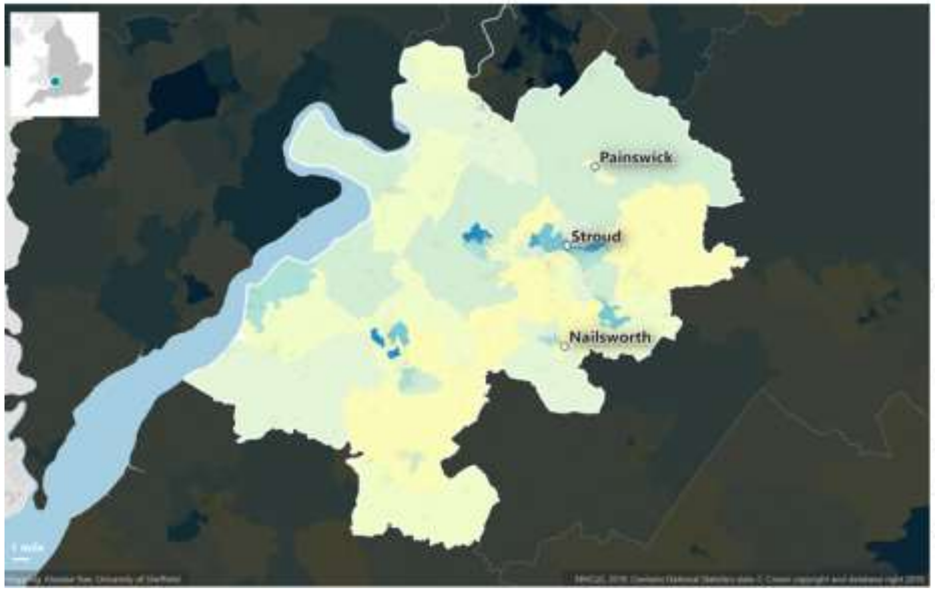


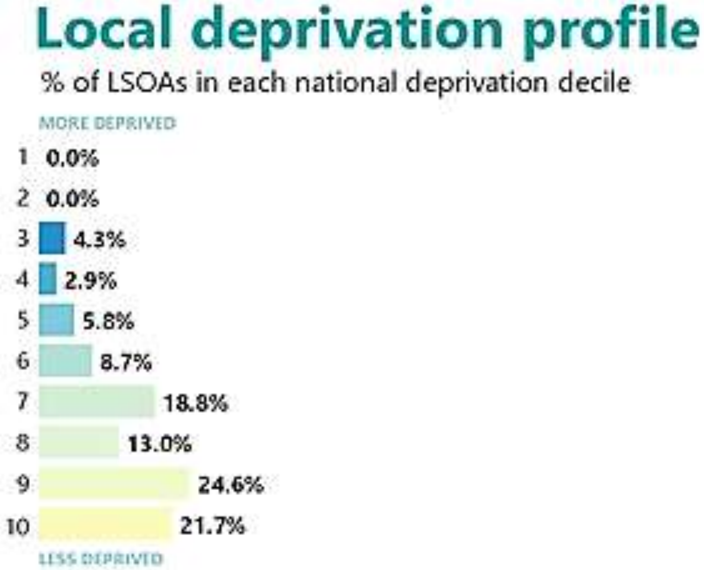
GLOUCESTER



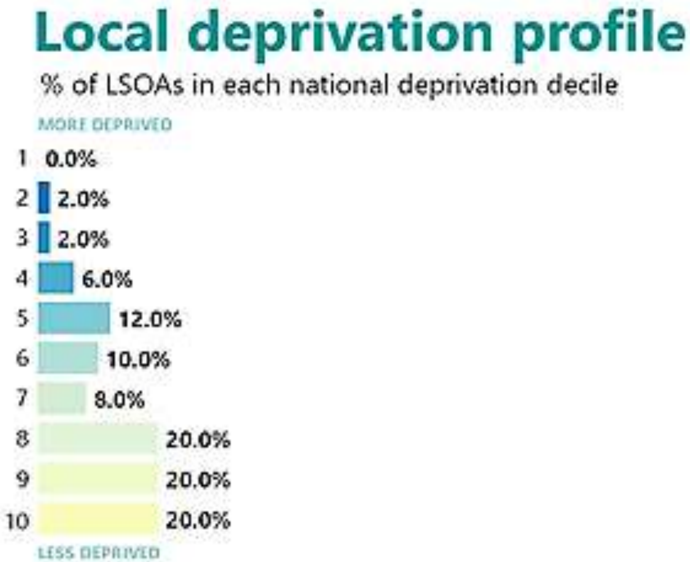


STROUD

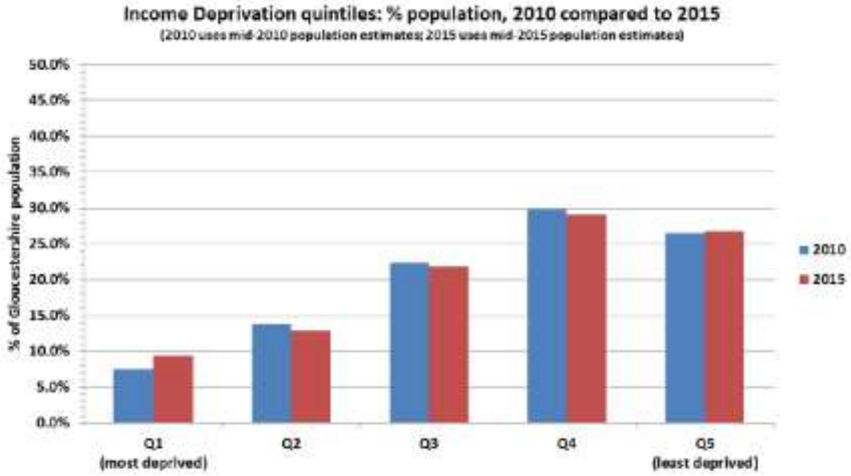




TEWKESBURY

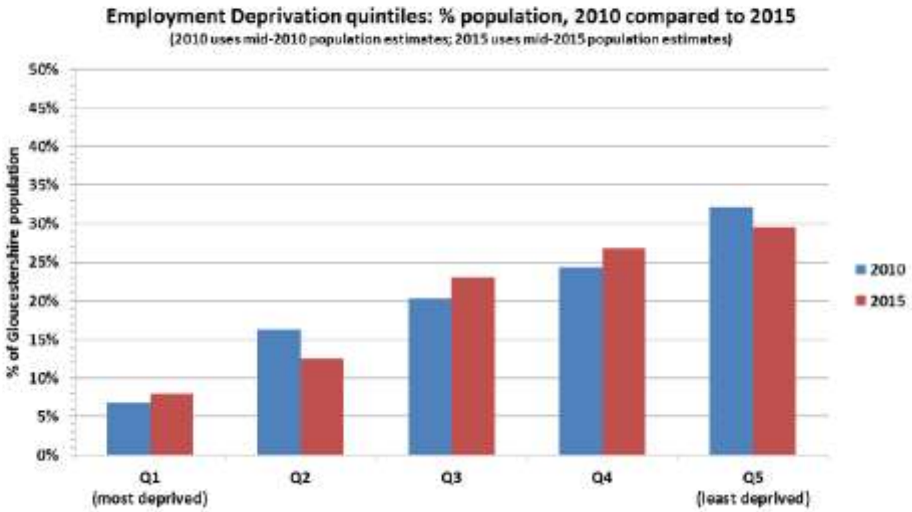


Income Deprivation



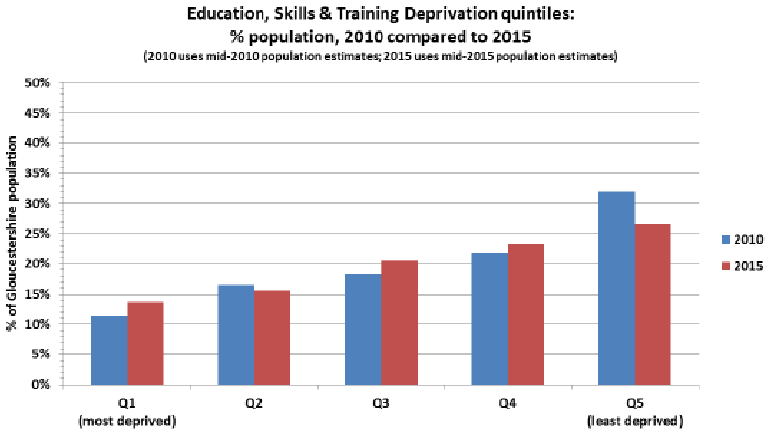
Income Deprivation			Rank (of 32,844)		
10% Most Deprived LSOAs	Ward	Local Authority Area	2015	2019	Difference
Gloucester 009E	Podsmead	Gloucester	804	983	⇧ 179
Gloucester 011A	Matson and Robinswood	Gloucester	1,053	766	⇩ -287
Forest of Dean 004C	Cinderford West	Forest of Dean	3,681	2,084	⇩ -1597
Cheltenham 004C	St. Paul's	Cheltenham	2,179	2,170	⇩ -9
Gloucester 008E	Moreland	Gloucester	1,924	2,496	⇧ 572
Gloucester 005D	Barton & Tredworth	Gloucester	2,028	2,486	⇧ 458
Gloucester 012D	Tuffley	Gloucester	2,129	2,589	⇧ 460
Gloucester 004B	Westgate	Gloucester	1,741	2,808	⇧ 1067
Cheltenham 005C	St. Marks	Cheltenham	2,128	2,929	⇧ 801
Gloucester 008C	*Matson and Robinswood*	*Gloucester*	*2,122*	*3,051*	⇧ *929*
Cheltenham 003A	*Hesters Way*	*Cheltenham*	*1,484*	*3,281*	⇧ *1797*
Cheltenham 006C	*Oakley*	*Cheltenham*	*2,948*	*4,449*	⇧ *1501*

Employment Deprivation



Employment Deprivation			Rank (of 32,844)		
10% Most Deprived LSOAs	Ward	Local Authority Area	2015	2019	Difference
Gloucester 009E	Podsmead	Gloucester	527	343	-184
Gloucester 011A	Matson & Robinswood	Gloucester	518	873	355
Gloucester 004B	Westgate	Gloucester	588	993	405
Gloucester 002C	Kingsholm & Wotton	Gloucester	1,264	1,000	-264
Cheltenham 005C	St. Marks	Cheltenham	1,107	1,112	5
Gloucester 004F	Westgate	Gloucester	2,537	1,641	-896
Forest of Dean 004C	Cinderford West	Forest of Dean	4,794	2,071	-2723
Gloucester 012D	Tuffley	Gloucester	2,718	2,578	-140
Cheltenham 005A	Hesters Way	Cheltenham	1,621	2,601	980
Gloucester 008E	Moreland	Gloucester	3,363	2,720	-643
Cheltenham 003A	Hesters Way	Cheltenham	2,484	4,323	1839

Education, Skills and Training Deprivation



Education, Skills & Training Deprivation			Rank (of 32,844)		
10% Most Deprived LSOAs	Ward	Local Authority Area	2015	2019	Difference
Gloucester 009E	Podsmead	Gloucester	109	112	3
Gloucester 011A	Matson & Robinswood	Gloucester	480	240	-240
Gloucester 012D	Tuffley	Gloucester	2,047	618	-1429
Gloucester 008E	Moreland	Gloucester	536	654	118
Tewkesbury 002C	Tewkesbury South	Tewkesbury	2,311	830	-1481
Gloucester 008C	Matson & Robinswood	Gloucester	962	832	-130
Cheltenham 006C	Oakley	Cheltenham	1,119	954	-165
Forest of Dean 004C	Cinderford West	Forest of Dean	1,759	1287	-472
Gloucester 011E	Matson & Robinswood	Gloucester	2,021	1,335	-686
Gloucester 007D	Coney Hill	Gloucester	1,449	1,482	33
Forest of Dean 007F	Coleford	Forest of Dean	3,025	1,547	-1478
Cheltenham 004C	St. Paul's	Cheltenham	2,104	1,636	-468
Cheltenham 003A	Hesters Way	Cheltenham	2,218	1,886	-332
Cheltenham 006B	Oakley	Cheltenham	2,814	1,963	-851
Forest of Dean 009C	Lydney East	Forest of Dean	2,751	2,089	-662
Tewkesbury 002B	Tewkesbury South	Tewkesbury	938	2,592	1654
Tewkesbury 001B	Northway	Tewkesbury	4,277	2,643	-1634
Cheltenham 006A	Oakley	Cheltenham	2,217	2,723	506
Stroud 014D	Dursley	Stroud	1693	2789	1096
Cheltenham 005C	St. Marks	Cheltenham	3,246	2,982	-264
Cheltenham 005D	St. Peter's	Cheltenham	3,751	3,003	-748
Gloucester 005D	*Barton & Tredworth*	*Gloucester*	*2,470*	*3,787*	*1317*
Forest of Dean 004B	*Cinderford East*	*Forest of Dean*	*2,873*	*3,887*	*1014*
Gloucester 004B	*Westgate*	*Gloucester*	*2,761*	*4,712*	*1951*
Gloucester 005B	*Barton & Tredworth*	*Gloucester*	*3,279*	*5,864*	*2585*

SECTION TWO

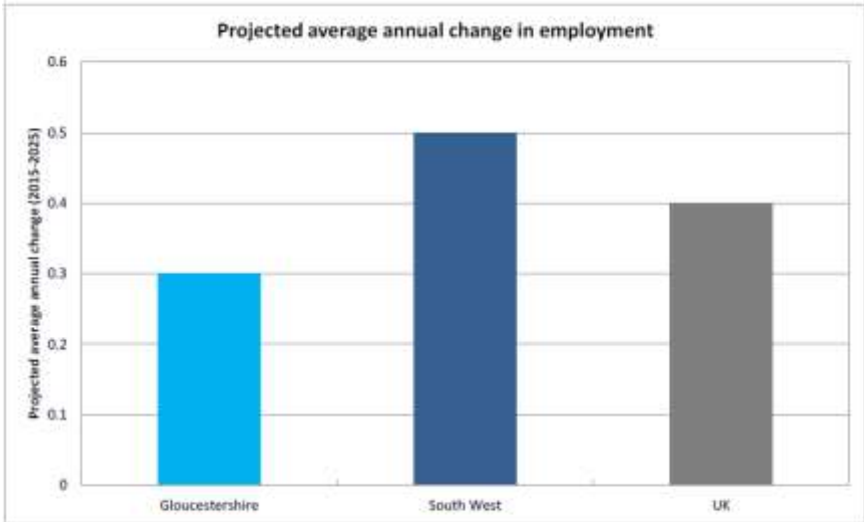
EMPLOYMENT

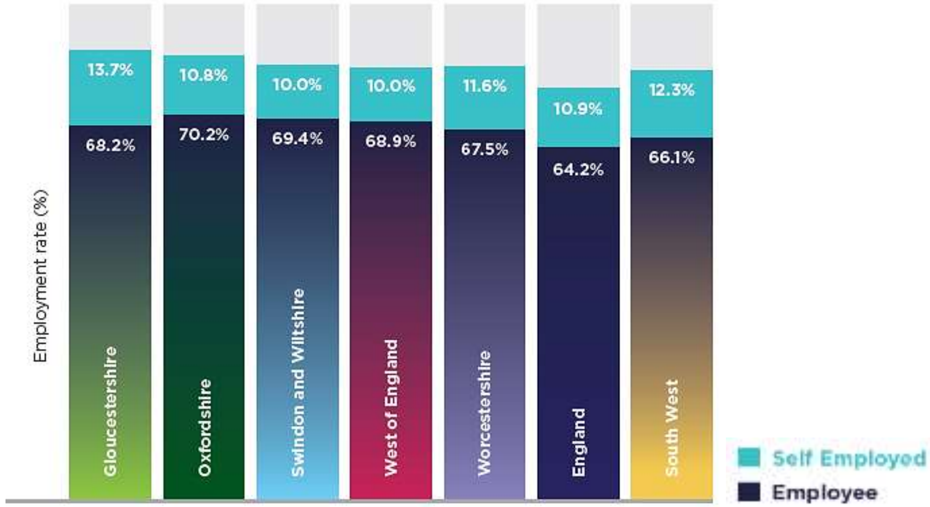
Employment

In 2017 Gloucestershire had an estimated population of 628,139 people, of which 383,204 (61.0%) were aged 16-64 years old. Of the 16-64 year old population, 326,600 (82.1%) were employed[27] – a higher proportion than nationally. A further 7,400 (2.2%) were unemployed, and 60,200 (16.0%) were classed as non-working, or economically inactive. The majority of those who are economically inactive do not want a job (80.8%). There are 33,520[28] businesses in Gloucestershire, creating 344,000[29] jobs and a workforce of 319,800[30].

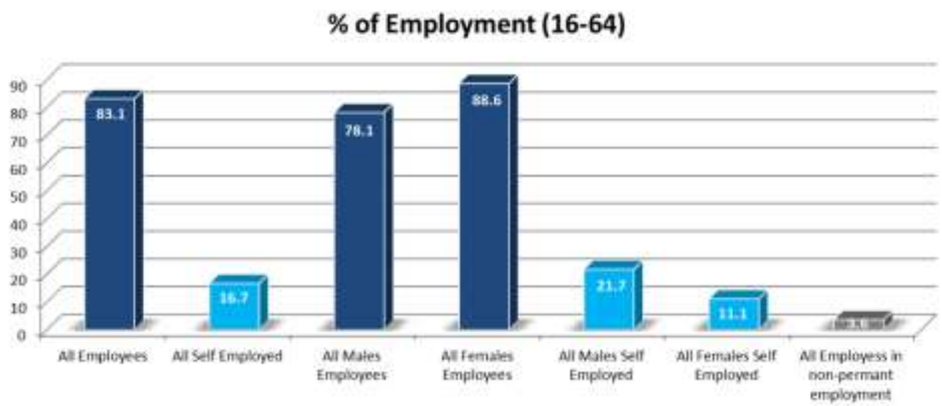
At a district level Cotswolds have the lowest level of those in employment (78.1%), followed by the Forest of Dean (79.8%). The highest level of those in employment is recorded in Tewkesbury (86.7%).

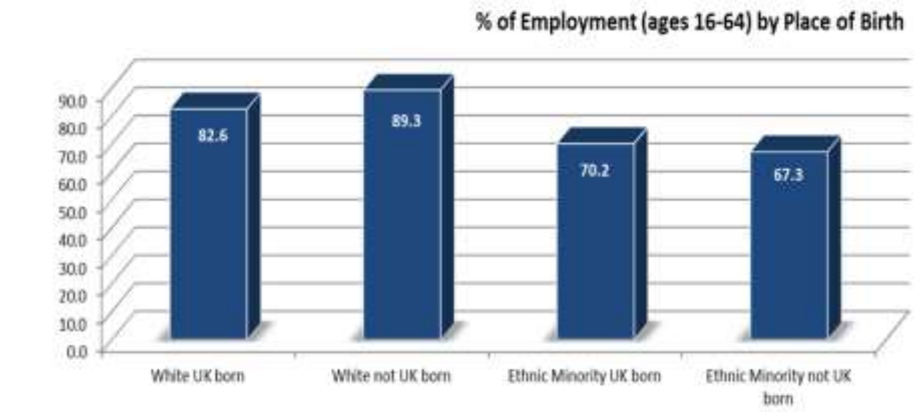
Of the people aged 16-64 who were in employment during the period Oct 2017-Sept 2018, 12.3% or 53,200 were self employed. This is above the national and regional figures of 12.2% and 10.6% respectively. Self employment rates vary considerably across the county from 9.3% in Gloucester to 15.1% in Cotswold[31].

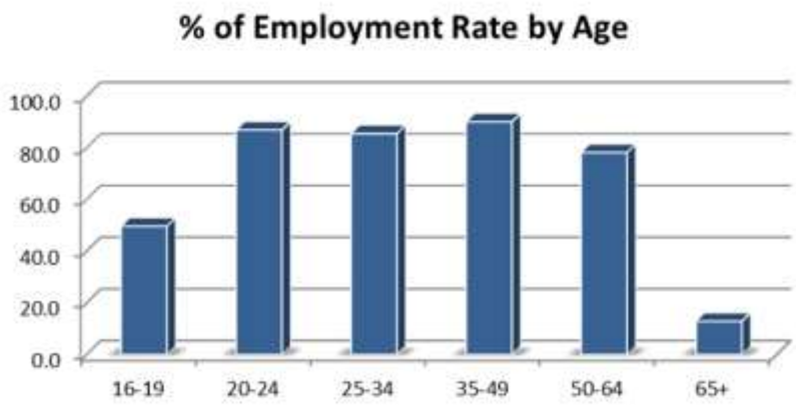


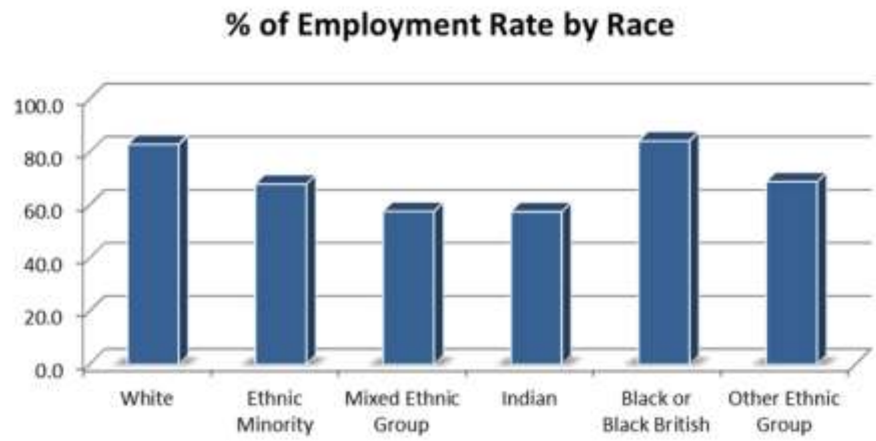


[27] Annual population survey, ONS
[28] UK Business Counts, ONS via http://www.nomisweb.co.uk/
[29] Job Density, ONS, The total number of jobs is a workplace-based measure and comprises employee jobs, self-employed, government-supported trainees, and HM Forces. It will include people that live outside of the county.
[30] Annual Population Survey, ONS, The workforce figure is a residence-based measure and refers to the number of residents aged 16+ in employment, residents may not be employed by businesses in Gloucestershire but instead work outside of the county.
[31] Annual Population Survey, ONS

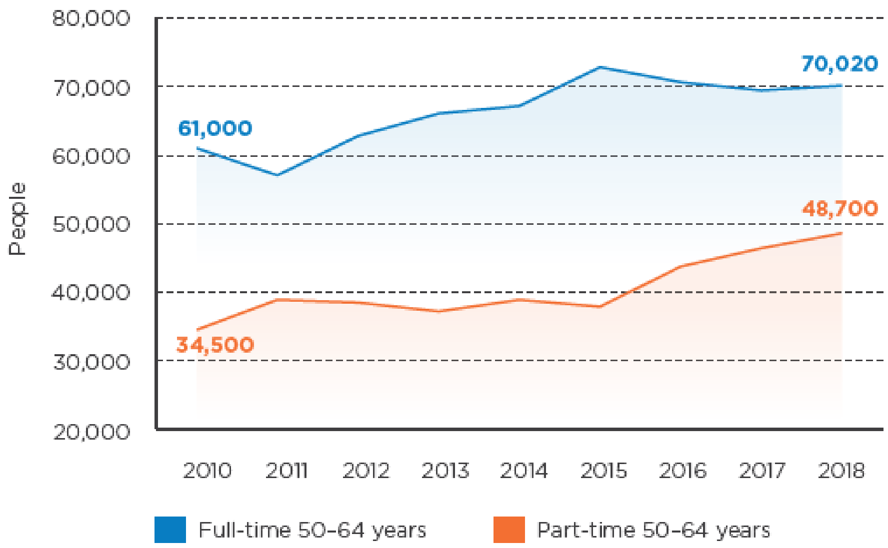








Source: ONS, Annual Population Survey Jan 2018 – Dec 2018



The above figure highlights that over the period 2010–2018 there have been growing numbers of 50–64-year-old workers who are in the labour market as either fulltime employees (+9,200) or part-time employees (+14,200). The economic activity rate is around 5% higher for this group than nationally; however, the proportion of 50–64-year-old workers in full-time employment is nearly 8% lower than nationally.

The ageing population means replacement demand will be a critical challenge in the future. There are no official figures, but a recent UK Commission for Employment and Skills paper[32] suggests that for every new job created in the county, nine people will leave the workforce and provides a summary of key findings for Gloucestershire.

Replacement demands mean that there will be a need to recruit suitably skilled people across all broad occupational groups, including those projected to decline:

- For some occupational groups (mostly higher skilled ones), we expect to see strong net growth in the number of jobs, supplemented by large replacement demands. For example, net growth of 12,000 jobs in professional roles is projected to be supplemented by 26,000 job openings arising from replacement demands.
- For those occupational areas in which we expect to see a net decline in the number of jobs, replacement demands mean that we can still expect a strong supply of job openings. For example, in administrative roles, it is projected that a loss of around 2,000 jobs will be more than offset by 12,000 job openings resulting from replacement demands.

[32] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/483126/LMI_Summary_-_Gloucestershire__Final_.pdf

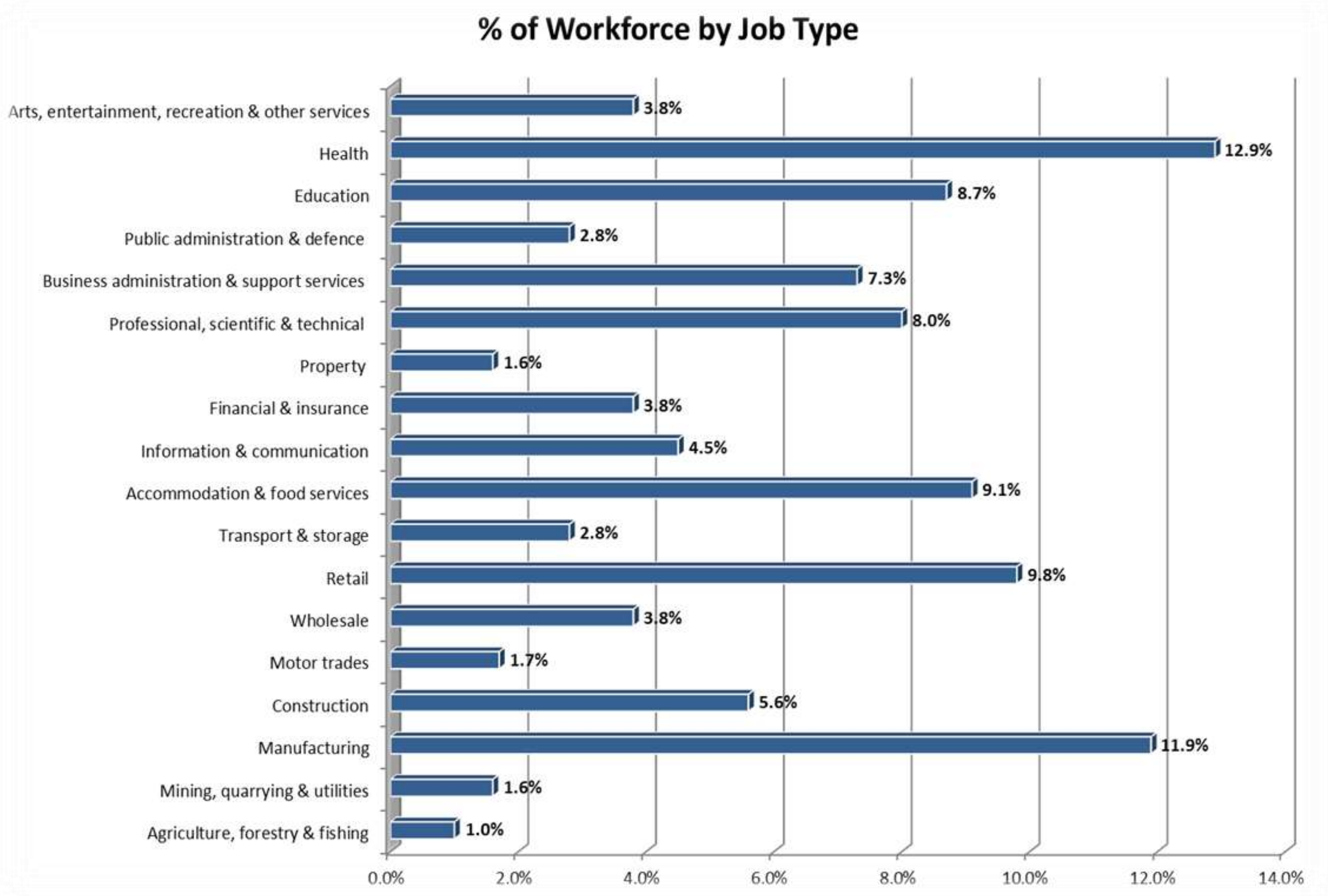
Workforce Structure

Gloucestershire has broadly the same representation of employment in higher skilled occupations, compared with the UK as a whole. In Gloucestershire, 42% of employment is in the three high skilled occupational groups: managers, professionals and associate professionals. This compares with a UK average of 43%. However, the figure is much higher in London (57%).

The proportion of employment in the three lowest-skilled occupations is slightly lower than the UK average. In Gloucestershire, 24% of employment is in sales or customer service, plant/process operatives and elementary roles, compared with a UK average of 25%.

The proportion employed in middle-ranking occupations is higher than the UK average: jobs in administrative, skilled trades and caring/leisure roles account for 34% of employment in Gloucestershire, compared with 32% in the UK.

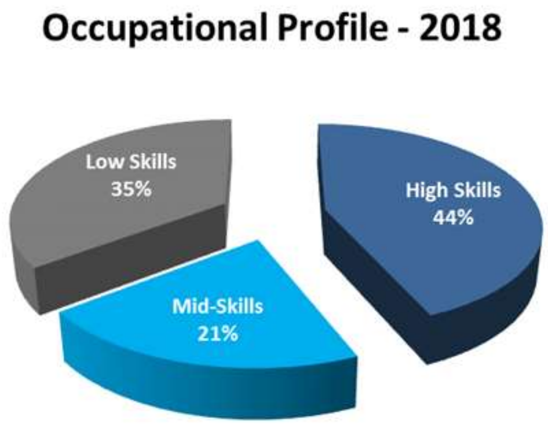
Sectoral Profile		
Industry	**% of Workforce**	**% of Population**
Agriculture, forestry & fishing	1.0%	0.5%
Mining, quarrying & utilities	1.6%	0.7%
Manufacturing	11.9%	5.4%
Construction	5.6%	2.5%
Motor trades	1.7%	0.8%
Wholesale	3.8%	1.8%
Retail	9.8%	4.5%
Transport & storage	2.8%	1.3%
Accommodation & food services	9.1%	4.1%
Information & communication	4.5%	2.1%
Financial & insurance	3.8%	1.8%
Property	1.6%	0.7%
Professional, scientific & technical	8.0%	3.7%
Business administration & support services	7.3%	3.3%
Public administration & defence	2.8%	1.3%
Education	8.7%	4.0%
Health	12.9%	5.9%
Arts, entertainment, recreation & other services	3.8%	1.8%

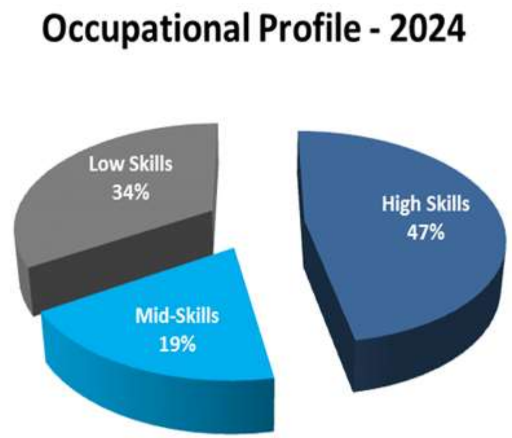


[33]

[33] Source: Business Register and Employment Survey 2017 (latest dataset)

Occupational Profile			
SOC 2010 Major Groups	**2018**	**Change**	**2024**
High Skills	**43.6%**	**3.5%**	**47.1%**
% all in employment who are - 1: managers, directors and senior officials (SOC2010)	10.5%	0.4%	10.9%
% all in employment who are - 2: professional occupations (SOC2010)	17.8%	3.6%	21.4%
% all in employment who are - 3: associate prof & tech occupations (SOC2010)	15.3%	-0.5%	14.8%
Mid-Skills	**21.0%**	**-1.9%**	**19.1%**
% all in employment who are - 4: administrative and secretarial occupations (SOC2010)	9.9%	-0.8%	9.1%
% all in employment who are - 5: skilled trades occupations (SOC2010)	11.1%	-1.1%	10.0%
Low Skill	**35.3%**	**-1.5%**	**33.8%**
% all in employment who are - 6: caring, leisure and other service occupations (SOC2010)	8.2%	1.9%	10.1%
% all in employment who are - 7: sales and customer service occupations (SOC2010)	8.8%	-1.4%	7.4%
% all in employment who are - 8: process, plant and machine operatives (SOC2010)	6.8%	-1.3%	5.5%
% all in employment who are - 9: elementary occupations (SOC2010)	11.5%	-0.7%	10.8%

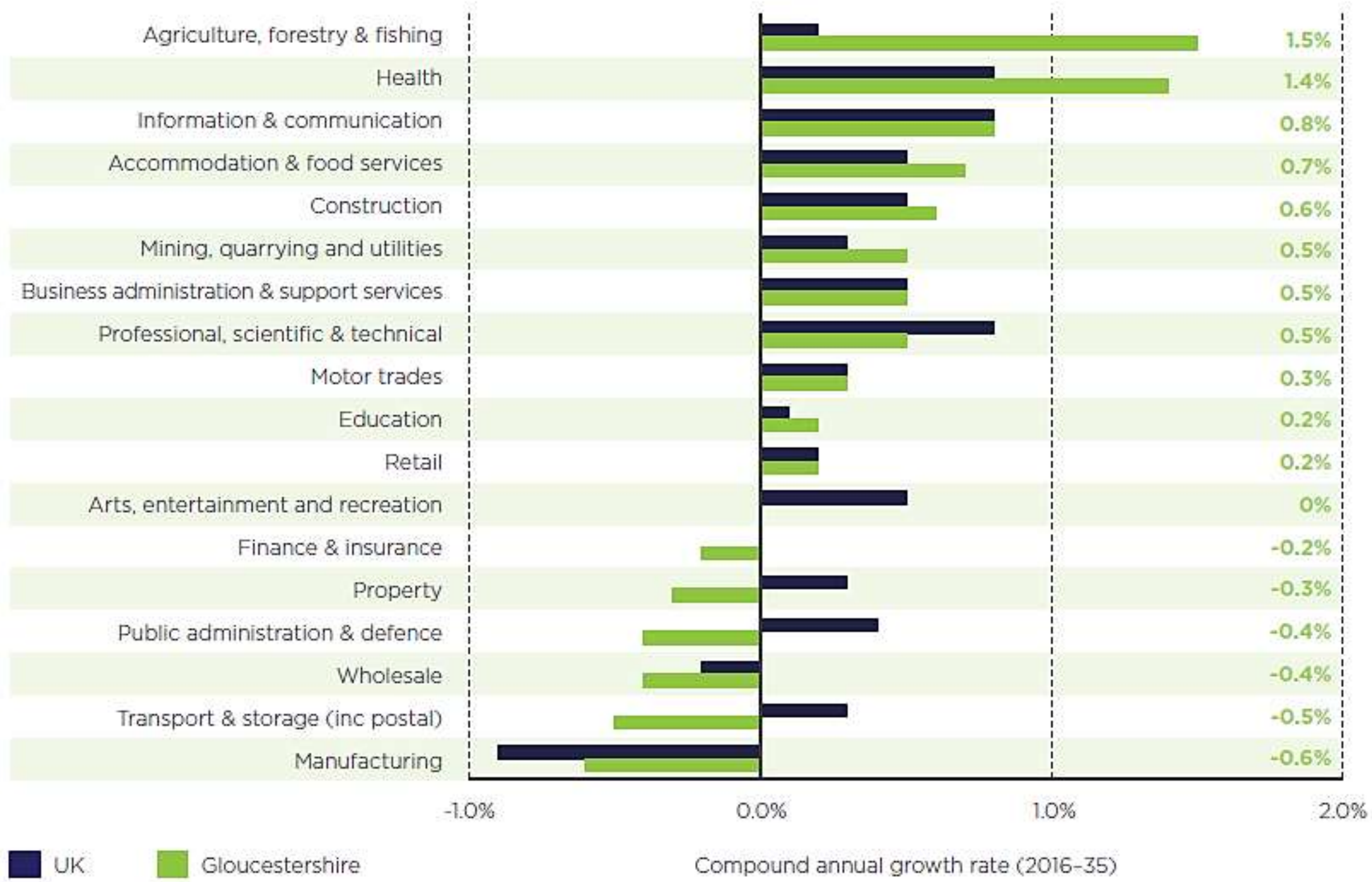




[34]

Gloucestershire has broadly the same representation of employment in higher skilled occupations, compared with the UK as a whole. The proportion of employment in the three lowest-skilled occupations is slightly lower than the UK average. The proportion employed in middle-ranking occupations is higher than the UK average.

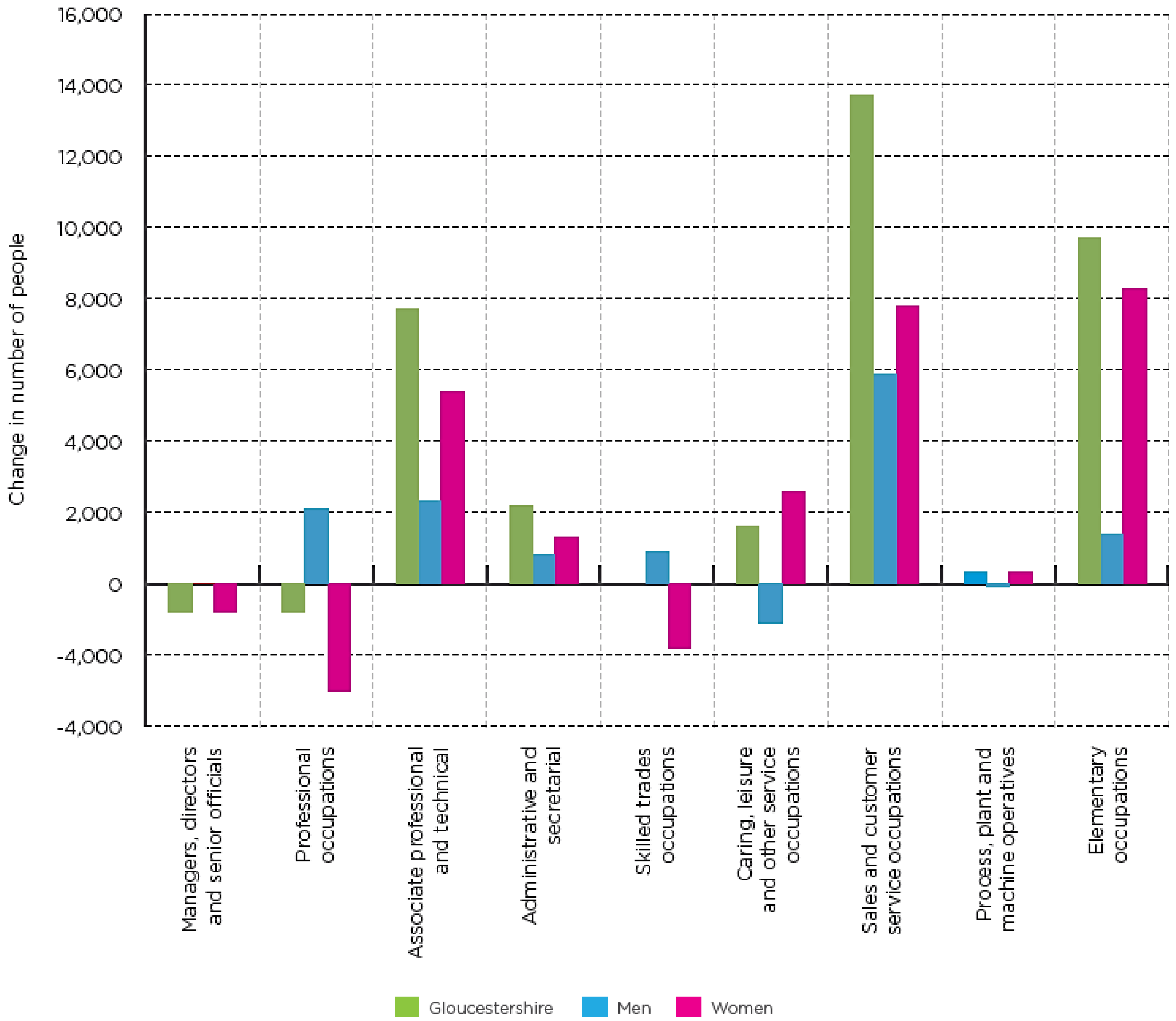
[34] Annual population Survey Jan 18-Dec18, 2014 prediction from Working Future IER estimates, MDM revision 12956



Projected change in employment by broad sector, 2016-35

The above figure shows four sectors, namely Agriculture, forestry & fishing; Health; Information & communication; and Accommodation & food services are anticipated to see the greatest growth over the next 20 years for Gloucestershire compared to the UK average. These sectors along with Construction; Mining, quarrying and utilities; Motor trades; and Education are all expected to grow above the national rate. The Wholesale sector is expected to exceed the national decline, while the Manufacturing sector is also expected to decline, but at a slower rate than the national average. The Finance & insurance; Property; Public administration & defence; and Transport & storage sectors are also expected to decline in contrast to the national picture.

In absolute numbers the greatest increase in employment in Gloucestershire is expected to be in Health and Accommodation & food services. Conversely the greatest fall is projected to be in Manufacturing, followed by Public administration & defence.

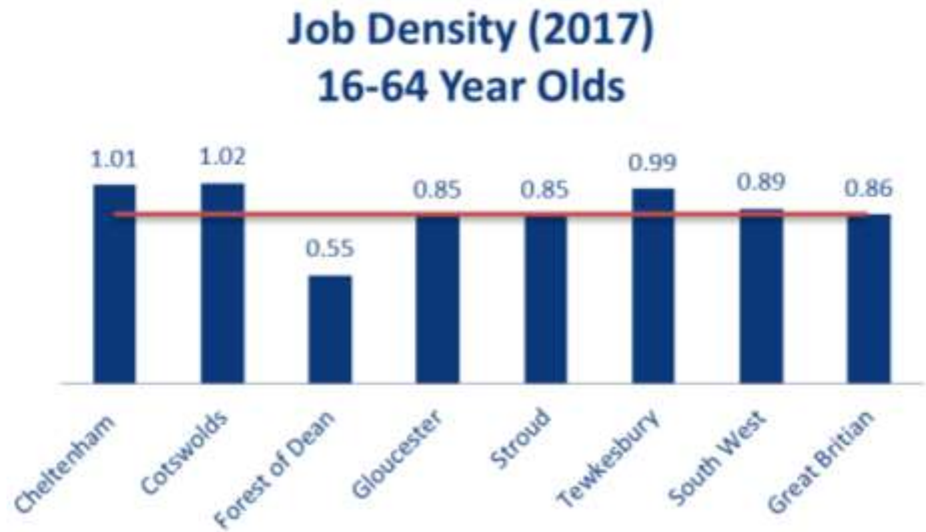


Change in the number employed by occupational group Gloucestershire, 2010-18

Gloucestershire has **a large SME community**; 71.4% of Gloucestershire's businesses employ less than 5 people, the same as the national average, compared to approximately 100 businesses employing 250 or more people[35].

We continue to have a high percentage (16.6%)[36] of our jobs in export intensive sectors. This is the 8th highest of the 38 LEPs and is an important opportunity for the county.

Jobs Growth			
measure	**2016**	**2017**	
	number	**number**	**Increase**
Count	283,000	286,000	3,000
Industry percentage	100.0	100.0	1.0% [37]



Job density is an estimation of the overall balance between jobs and people. It is defined as the number of filled jobs in an area divided by the number of people of working age resident in that area, a job density of 1.0 would mean that there is one job for every resident of working age. In 2017 Gloucestershire had a job density of 0.88 which is lower than the regional average (0.89) but higher than the national average (0.86). By district, Cotswold has the highest job density (1.02) and Forest of Dean the lowest (0.55)[38].

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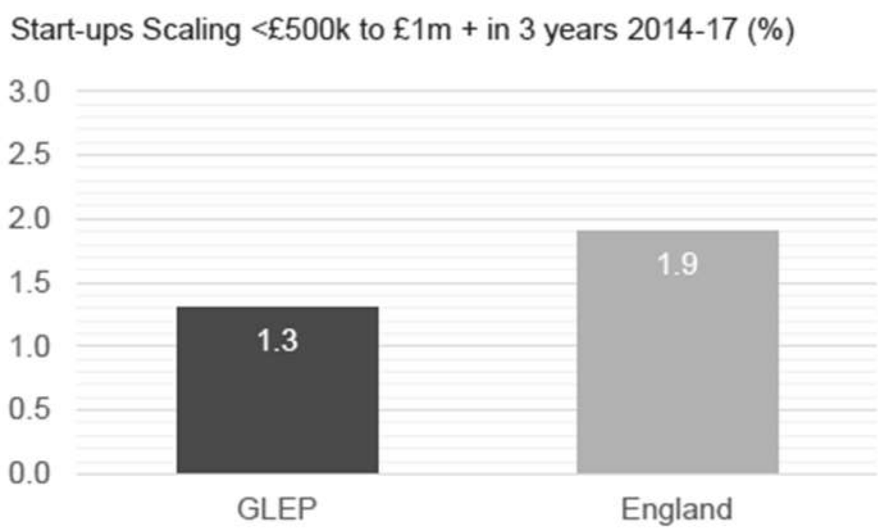
[35] http://www.nomisweb.co.uk/
[36] http://www.ons.gov.uk/ons/rel/input-output/input-output-supply-and-use-tables/2012-edition/index.html
[37] Source: ONS Annual Population Survey LEP
[38] Job Density, 2017,ONS https://www.nomisweb.co.uk

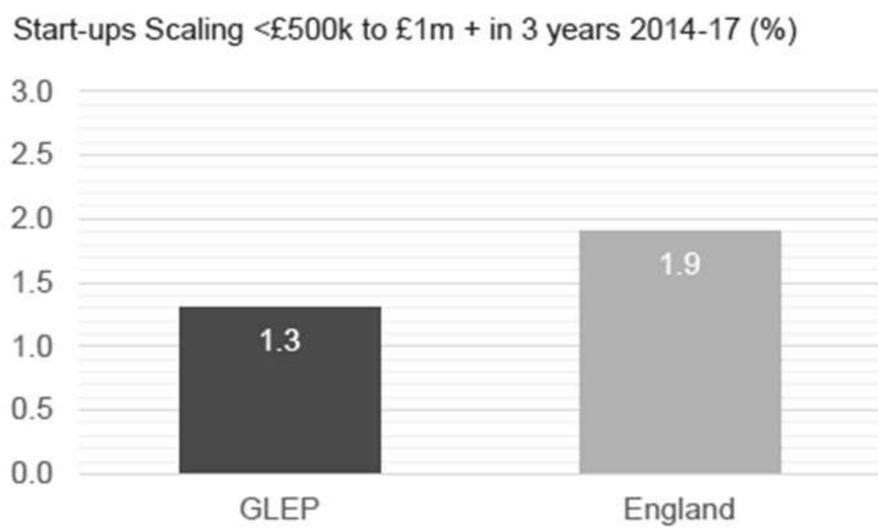
Business Start ups[39]:

- 2,384 new registered businesses in 2017
- 38 start-ups per 10,000 population in 2017
- 61% of 2014 start-ups survived to 2017
- 1.3% of surviving 2014 start-ups grew from <500k to £1m + T/O by 2017

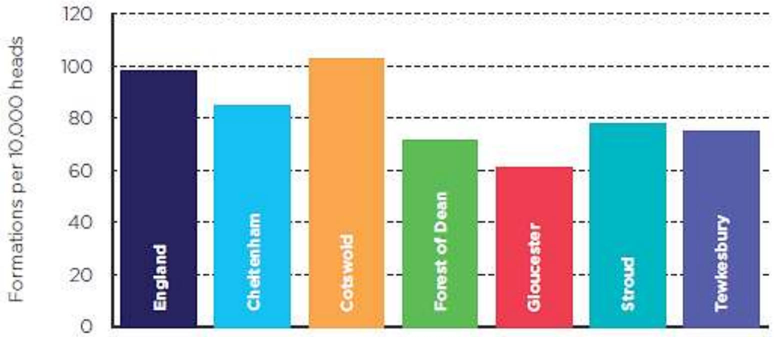
Growth:

- 6.3% high-growth firms (OECD 20% employment definition) incidence rate (2014-2017)
- 15.0% high-growth firms (OECD 10% employment definition) incidence rate (2014-2017)
- 1.4% small high-growth firm (Clayton variation to OECD definition) incidence rate (2014-2017) –1.4% for England
- 5.0% of £1-2m T/O businesses in 2014 grew to a minimum of £3m by 2017
- 8.2% of job-creating firms with positive productivity growth (2014-17)

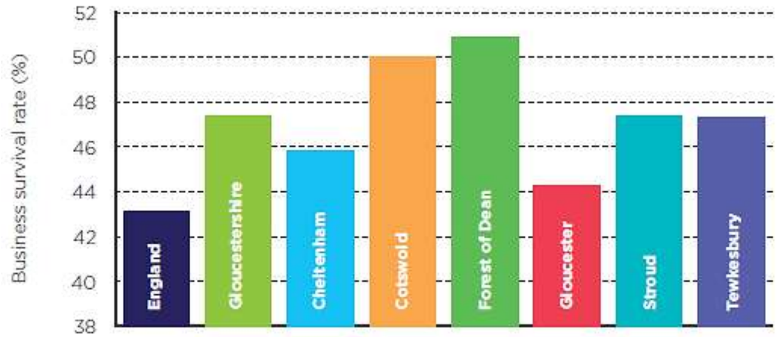




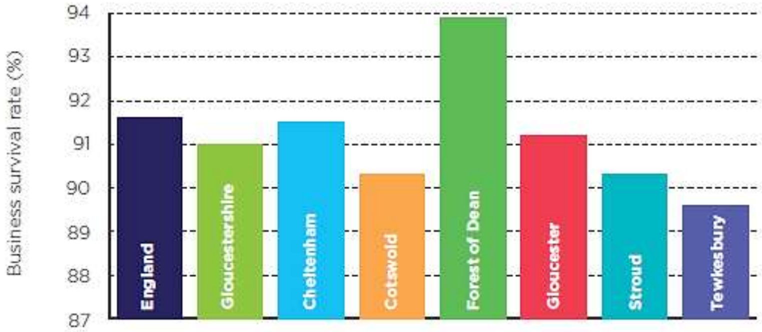
[39] ERC UK Local Growth Dashboard, June2018 - The dataset used in the production of the growth and start-up data is the Business Structure Database (BSD). This is a dataset produced by the Office of National Statistics (ONS) and is an annual snapshot of the Inter-Departmental Business Register (IDBR) which is a live register of data collected by HM Revenue and Customs via VAT and Pay as You Earn (PAYE) records. The IDBR data are complemented with data from ONS business surveys. If a business is liable for VAT (turnover exceeds the VAT threshold) and/or has at least one member of staff registered for the PAYE tax collection system, then the business will appear on the IDBR (and hence in the BSD). We use the firm-level BSD for firm growth rates, start-ups, and T/O calculations and the site-level BSD for the calculation of new and gross new jobs. All the data contained in this report can be downloaded from the Data Hub on the ERC website.



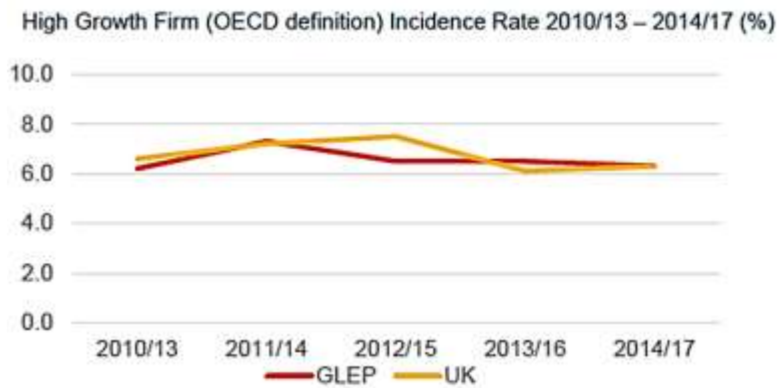
Business starts per 10,000 head population, 2017



Five-Year business survival rates, 2012-17



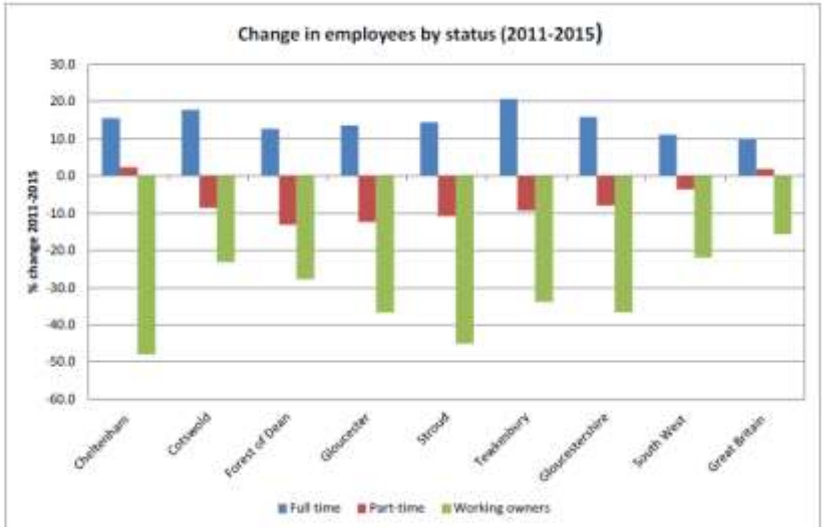
One-year business survival rates, 2016-17

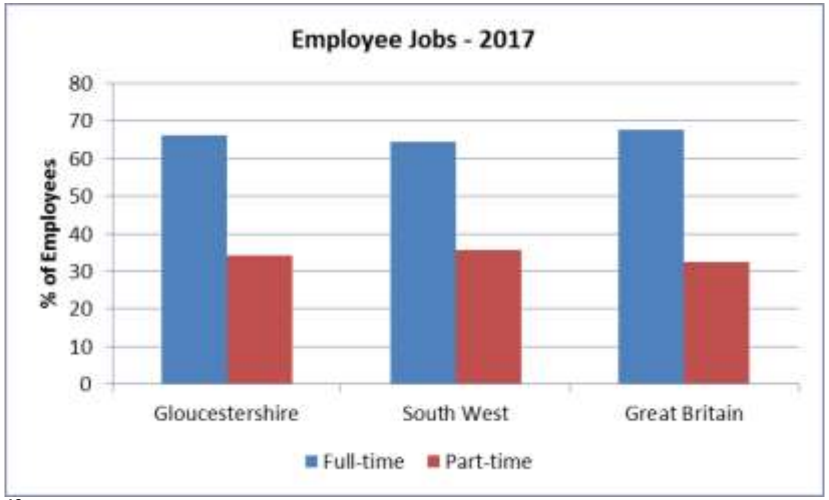


Only Cotswold district has kept pace with (and exceeded) the national level of business formation per head. Gloucester has the lowest level of business starts. As the location with the highest number of students and younger workers, this suggests there may be a need to further support entrepreneurialism, skills and talent retention.

Survival rates for the first five years of existence, for businesses formed in 2012. This shows that the Forest of Dean and Cotswold have the highest proportion of business survivals, with these two districts being the only ones to have a survival rate of 50% or more. Gloucester has had the fewest business survivals, at 44.3% surviving. However, the average five-year survival rates for all districts, and for Gloucestershire, are higher than the average business survival rate for England (43.1%). More than 90% of new Gloucestershire businesses survived their first year, with only Tewkesbury having a business survival rate below 90%. However, the average survival rate for England is 91.6%, higher than the average for Gloucestershire and for every district with the exception of the Forest of Dean, which has a one-year business survival rate of 93.9%.

Employment status:

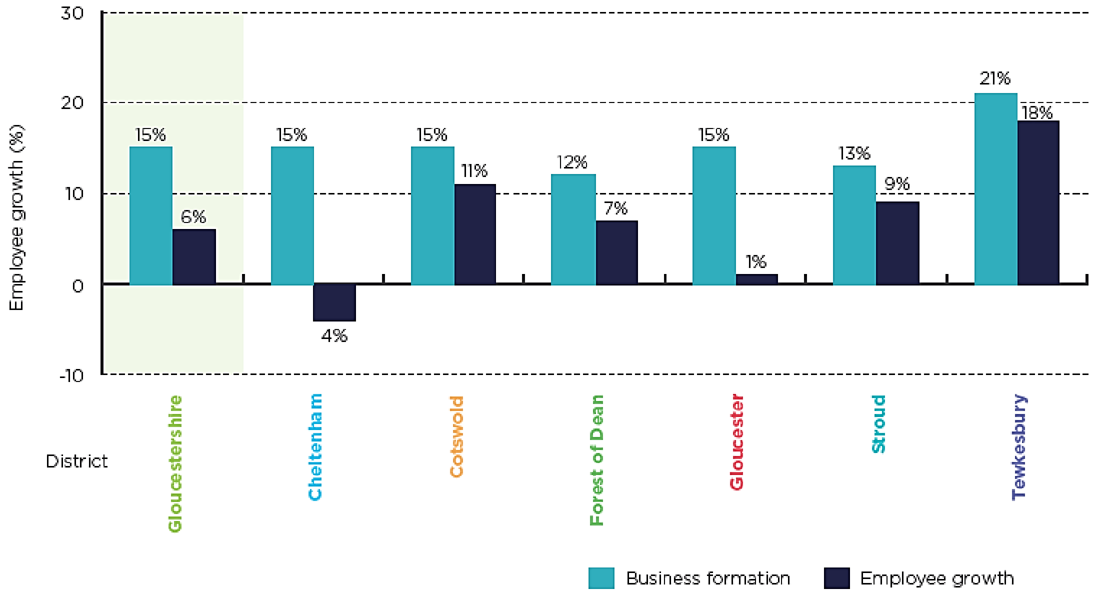




[40]

Between 2015 and 2017 the total number of local employees increased by 1,000 from 285,000 to 286,000. At 0.4% employee growth over two years was below the South West regional growth of 1.7% and the national growth of 3.1% in the period.

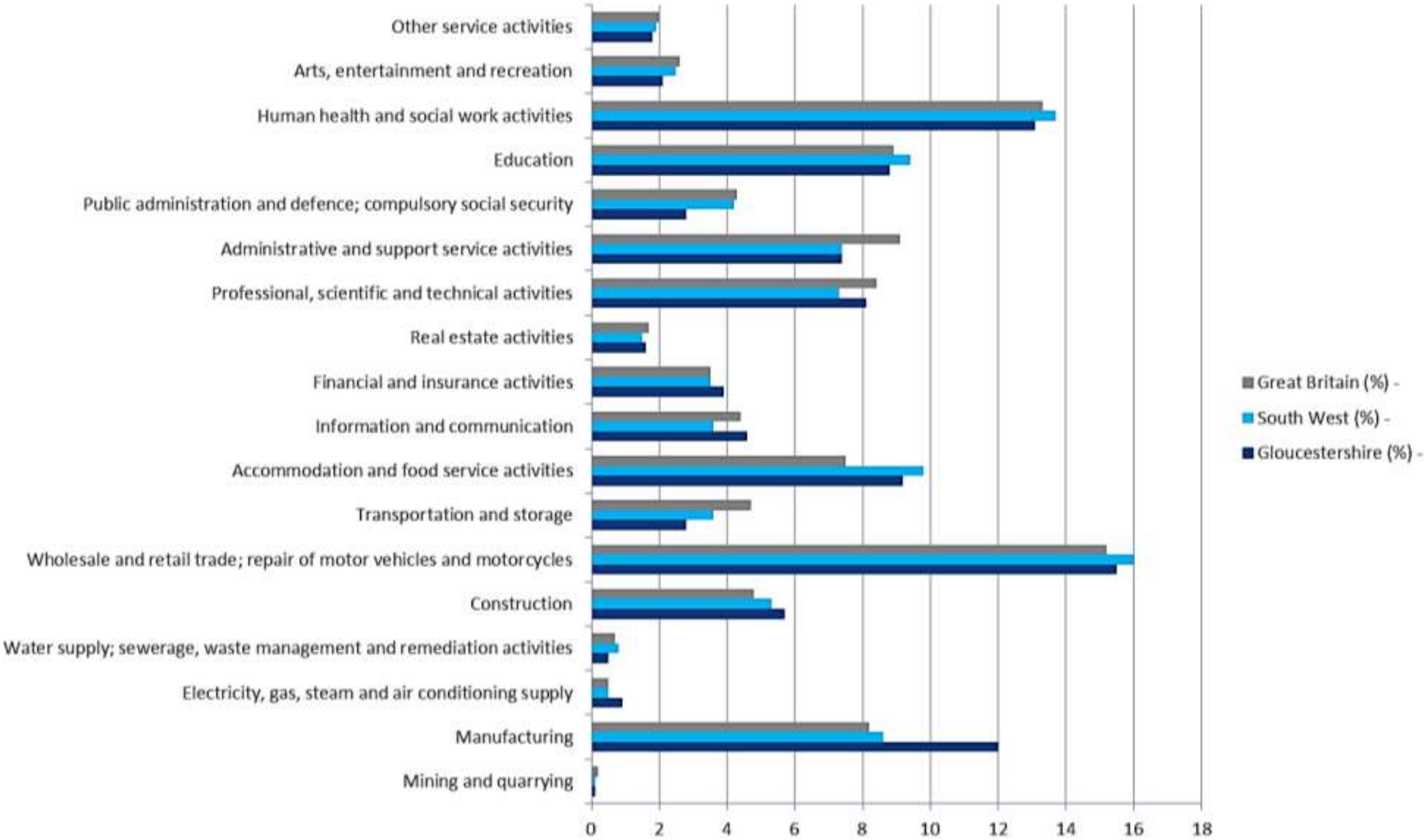
Over the last five years the number in employment in Gloucestershire has increased by 13,300 or 4.8%. The average annual growth stands at 1.2%, which was higher than the regional rate but lower than the national rate. At district level the greatest growth has been in Tewkesbury (2.6%) and Cheltenham (2.0%), the Forest of Dean experienced the lowest rate of growth (0.1%)



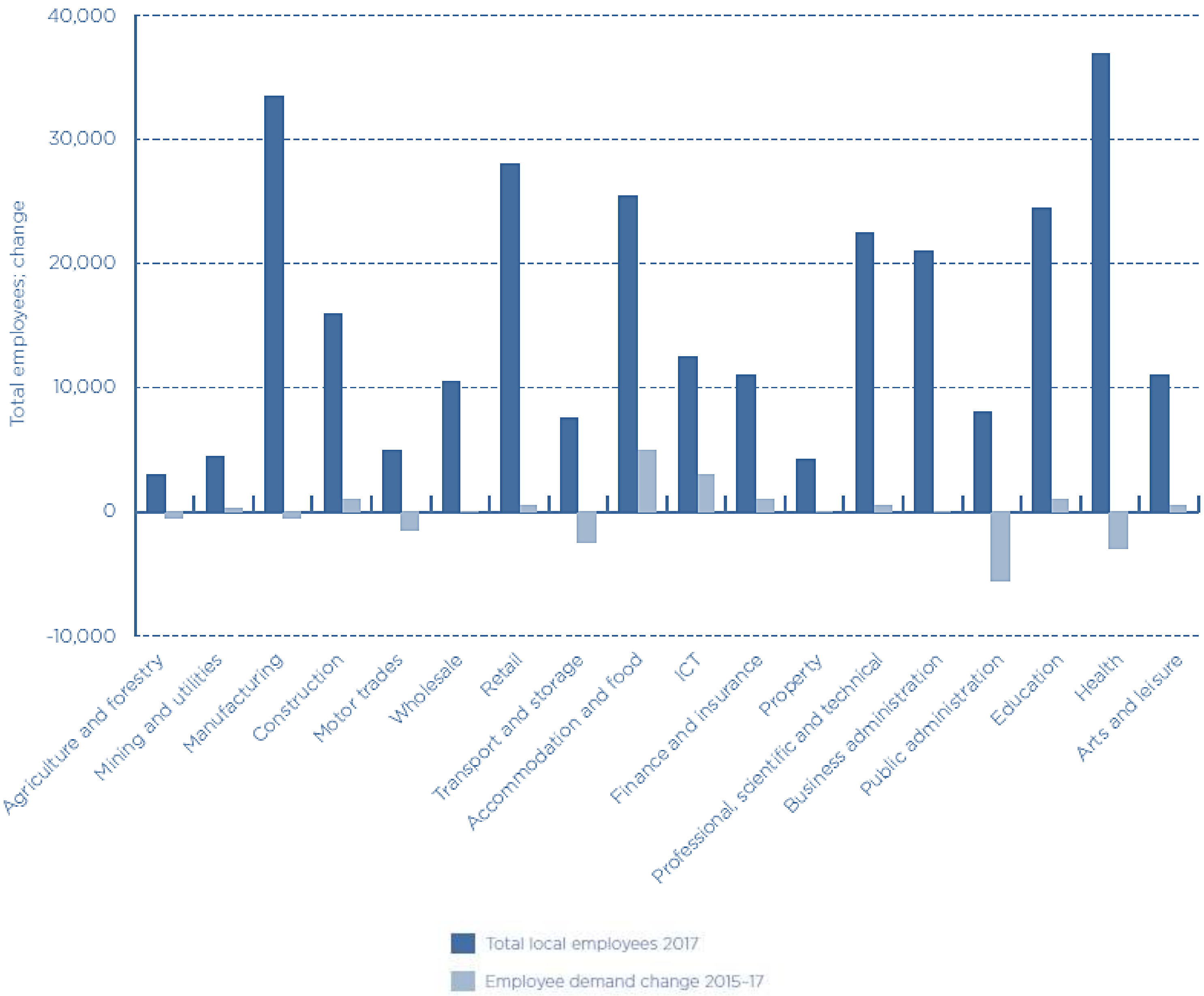
Business formations and employee growth in Gloucestershire and districts, 2010-18

[40] ONS, Mid-year estimates 2017

Proportion of employment by broad industrial sector - 2017

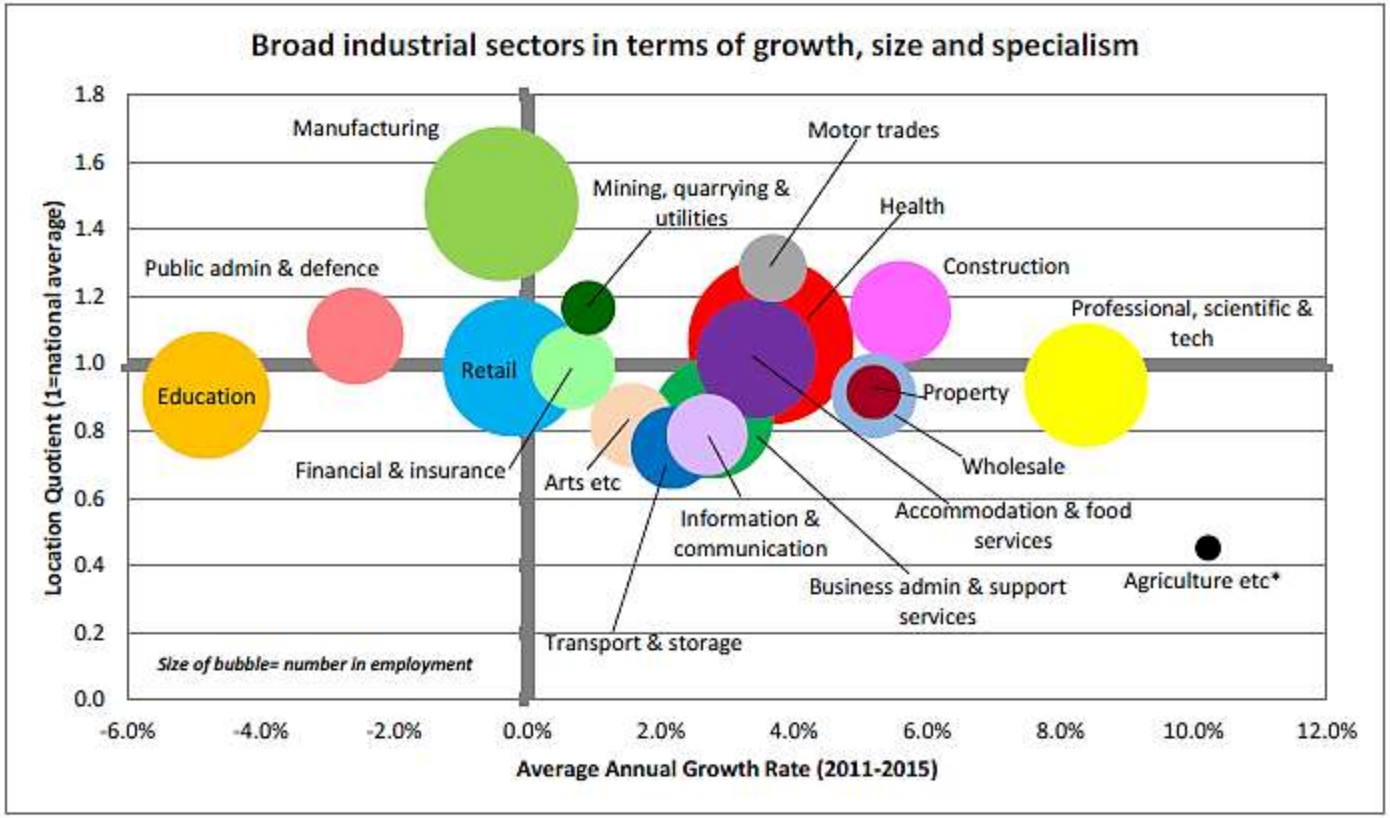


Source: ONS, Mid-year estimates 2017



Employee Demand in Gloucestershire by major sector, and change, 2015-17

Past workplace employment by industrial sector (2011-2015)



[41]

The sectors employing the most people in the county are those represented by the largest bubbles in the above graph. Those in the top-left quadrant are more concentrated in Gloucestershire than in England as a whole, but crucially have experienced falling employment in Gloucestershire in recent years. The upper-right quadrant of the diagram shows sectors which are growing and in which Gloucestershire has a structural advantage in terms of local concentration of employment.

The health sector is the largest in terms of employees accounting for some 14.1% or 39,700 of the total number in employment. Hospital activities account for the largest number of health employees followed by residential care. This locally concentrated sector has experienced an annual average growth rate of 3.7%.

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[41] Business Register and Employment Survey, ONS https://www.nomisweb.co.uk, please note The Agriculture, forestry and fishing sector is not wholly represented in the BRES
Location quotients (LQ) are used for identifying specialism. A simple ratio has been used to compare the share of local employment in an industry to the share of GB employment in that industry. A LQ that is greater than 1 indicates the local area has a higher concentration of employment in the industrial activity relative to GB.

The manufacturing sector is the second largest sector with 34,000 people employed in the sector equating to 12.1% of total employment. This is well above the regional and national figures indicating that the sector is the most locally concentrated of all the sectors. The following sub sectors account for the highest number of manufacturing employees: manufacture of fabricated metal products; aerospace; machinery and equipment; computer, electronic and optical products; food products; rubber and plastics; and electrical equipment. Despite the sector as a whole experiencing a decline since the previous year most of the above sub sectors did exhibit growth.

Retail, is the third largest sector in terms of employment. It has experienced decline over the last five years but is important not only in terms of a tourist attraction and as an important facilities for residents.

The education sector is also large as and well represented from primary through to higher education levels. The county boasts a number of well established and respected schools, colleges and two universities; however, this sector has suffered a decline in employment numbers mainly in the primary and secondary sub sectors.

The professional, scientific & technical sector is significant in terms of employees and growth as a result of activities relating particularly to management and technical consultancies, veterinary activities, architectural activities and head offices located within the county.
The number of employees in the business administration and support services sector has grown over the last five years and is dominated by the recruitment agency activities, cleaning and landscape activities, general business support and private security activities.
The accommodation & food services sector which is related to the tourism industry is not unsurprisingly important to Gloucestershire in terms of employment. Over the last five years there has been a growth in accommodation and food service activities, while beverage serving activities have declined.

The number of people employed in the construction sector has increased over the last five years which is a result of growth in the construction of utility projects and specialized construction activities.

The public administration and defence sector is also important in the county, particularly given the presence of GCHQ. Decline in the number of employees is however, inevitable in light of the central government cuts.

The arts, entertainment & recreation sector is not well represented in terms of the number of employees as much of this sector is made up of self employed workers etc that are not recorded by the Business Register and Employment Survey. The growth over the last five has been driven by an increase in the number of people employed in the sports activities and amusement and recreation sub sector.

The wholesale sector has undergone growth in terms of number of employees over the last five years, this has been driven by growth in the majority of sub sectors with the exception of wholesale of food, beverages and tobacco which underwent a decline.

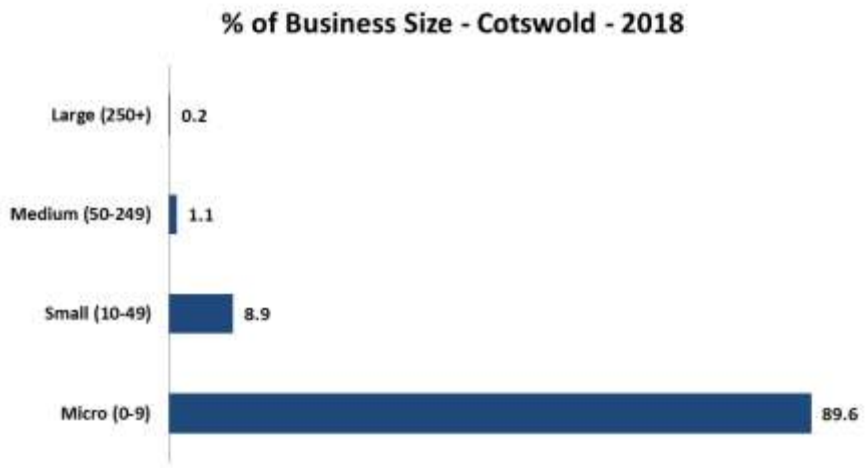
The number of people employed in the finance & insurance sector is comparatively small, although the sector is important locally. It has undergone growth over the last five years which has been driven by increased employment in activities auxiliary to insurance and pension funding.

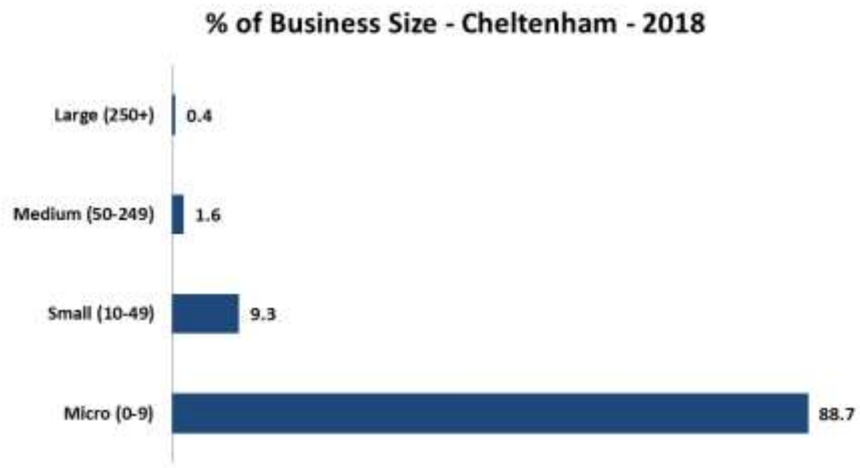
The transport and storage and information and communication sectors are underrepresented locally and comparatively small. However, they have experienced growth over the last five years. The growth in the transport and storage sector is largely driven by a growth in the number of people employed in warehousing and support activities for transportation and postal and communication activities. The growth in the information and communication sector is a result of increasing employment in telecommunications and information service activities.

The motor trade sector is a growing sector and is overrepresented locally; however it employs a relatively small number of people. The maintenance and repair of motor vehicles accounts for the largest proportion of employment in the sector.

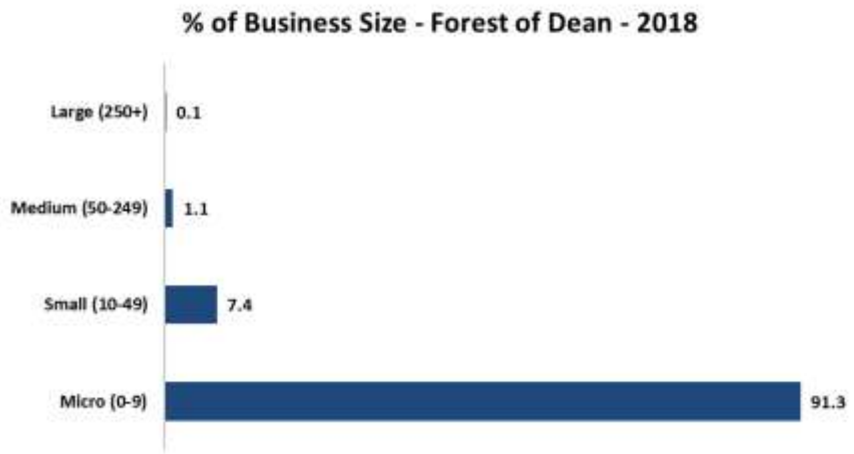
The number of people employed in the property sector has increased in recent years; however the numbers involved are relatively small.
The mining, quarrying and utilities sector is important to Gloucestershire and is potentially a large employer relating to nuclear power generation. Two technical offices associated with Horizon and EDF have been established in the county and as the likelihood of nuclear power station new build draws near the number of associated employees is likely to increase.

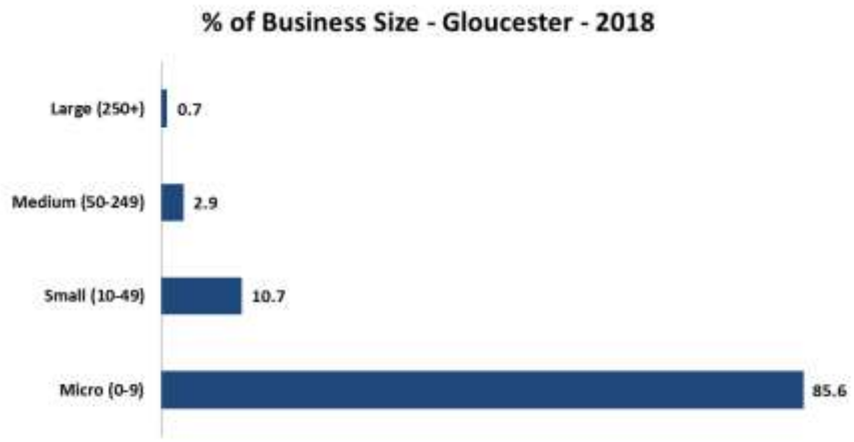
Although the Agriculture, forestry & fishing sector appears small[42], it is an important sector in Gloucestershire. According to the June 2013 statistics from Defra the sector accounted for a total labour force of about 6,200 people in the county which was a 1% increase on the 2010 figure[43]. With the effects of the recession and having to cope with vagaries of the industry, farmers needed to improve the profitability of their farms and face the prospect of providing a non-farming income which they have successfully managed through various forms of diversification and specialisation with enterprises such as the reintroduction of rare breeds, organic farming, biomass production, farm open days and other tourism related activities in order to maintain their livelihood.

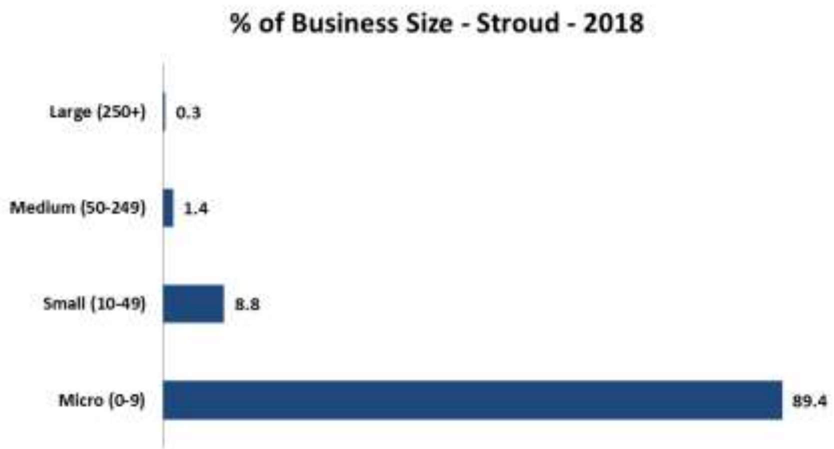


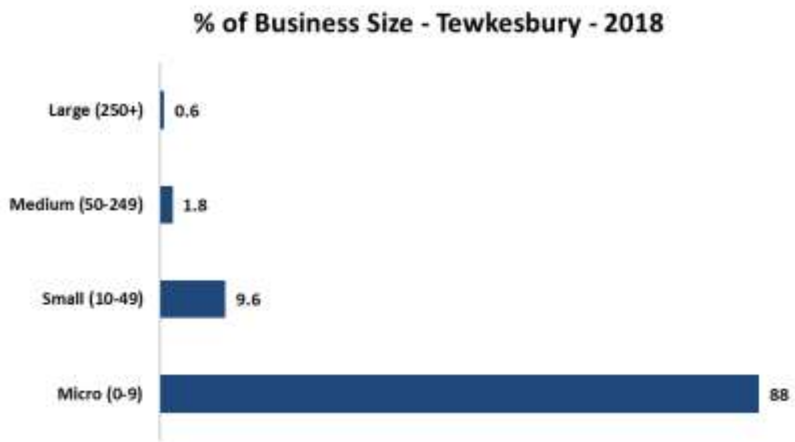


[42] The Agriculture, forestry and fishing sector is not wholly represented in the BRES data
[43] Structure of the agricultural industry in England and UK at June 2013, Defra
https://www.gov.uk/government/statistical-data-sets/structure-of-the-agricultural-industry-in-englandand-the-uk-at-june

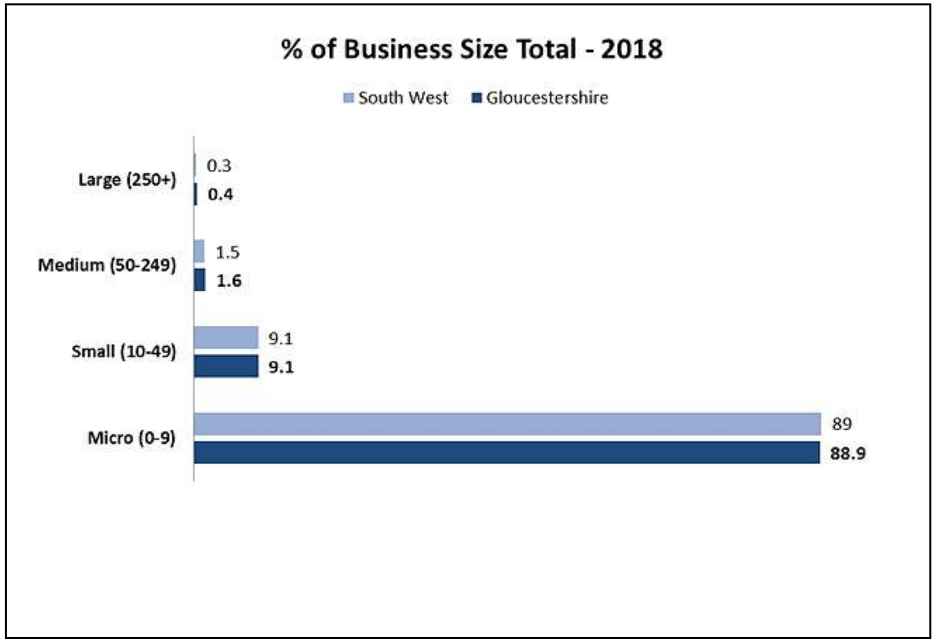




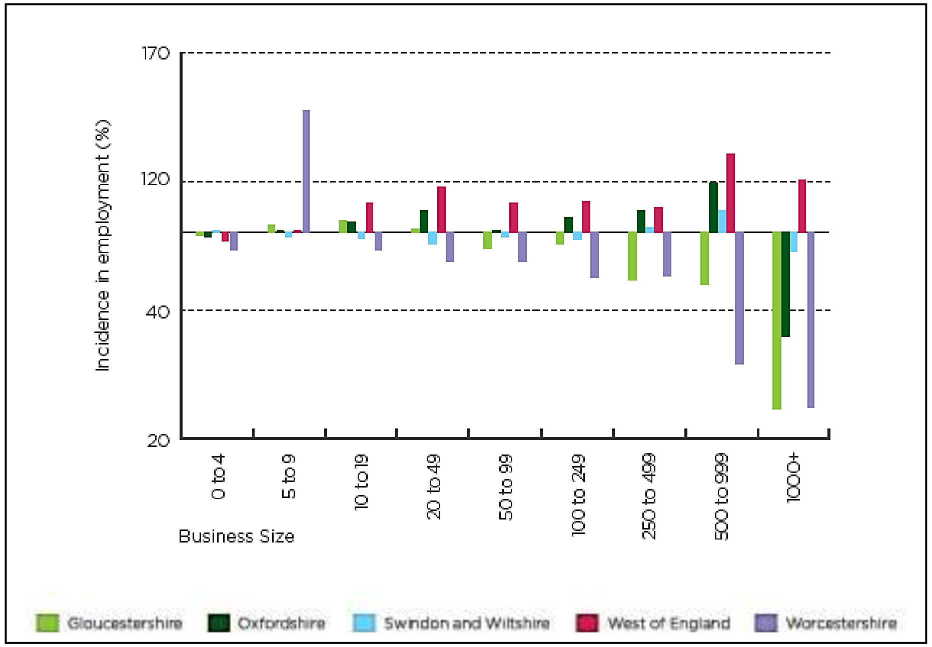




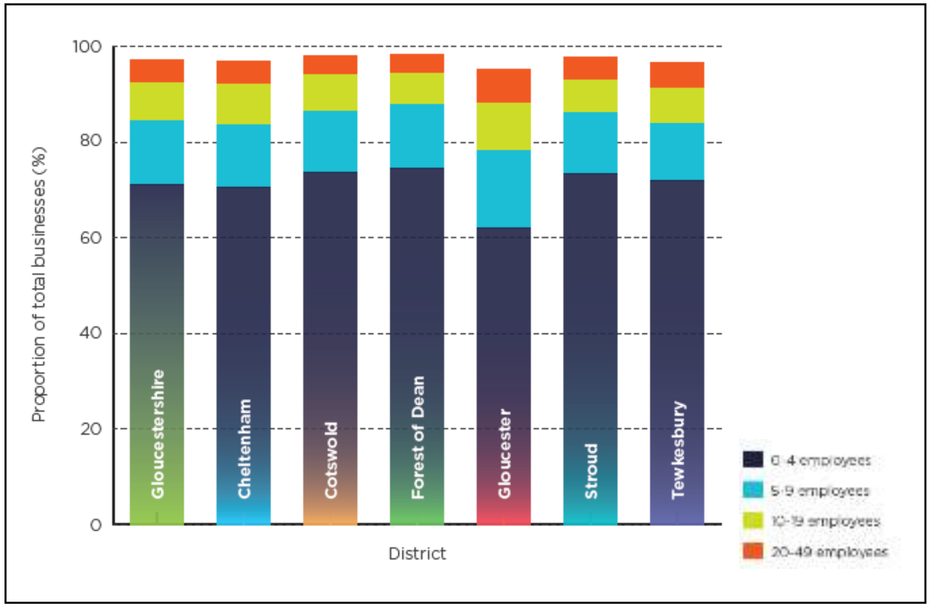
Source: Inter Departmental Business Register (ONS) 2018, Note: % is as a proportion of total (enterprises)



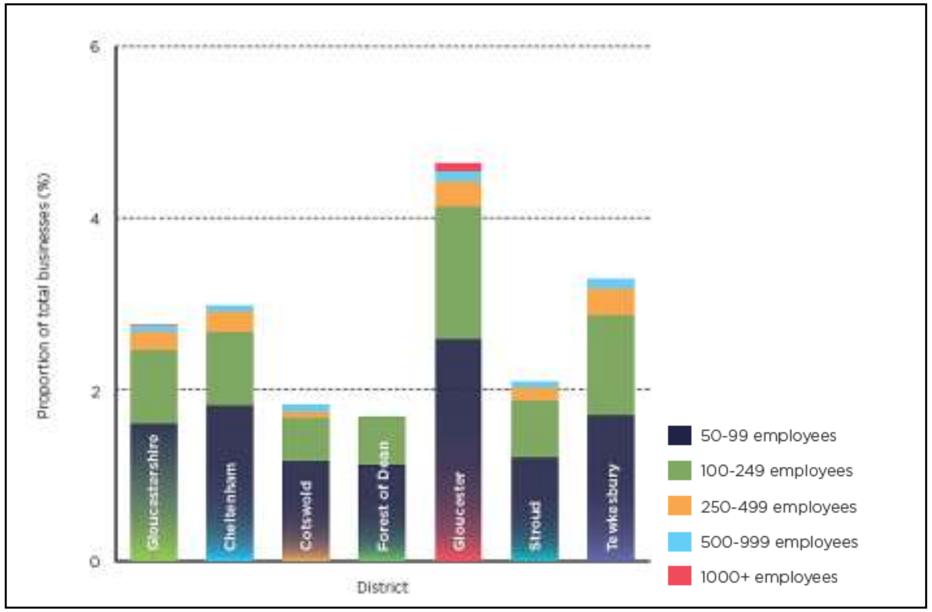
% of Business Size Total - 2018
South West
Gloucestershire
Large (250+)
0.3
0.4
Medium (50-249)
1.5
1.6
Small (10-49)
9.1
9.1
Micro (0-9)
89
88.9



Incidence in employment (%)
170
120
40
20
0 to 4
5 to 9
10 to 19
20 to 49
50 to 99
100 to 249
250 to 499
500 to 999
1000+
Business Size
Gloucestershire
Oxfordshire
Swindon and Wiltshire
West of England
Worcestershire



Proportion of total businesses (%)
100
80
60
40
20
0
Gloucestershire
Cheltenham
Cotswold
Forest of Dean
Gloucester
Stroud
Tewkesbury
District
0-4 employees
5-9 employees
10-19 employees
20-49 employees



Proportion of total businesses (%)
6
4
2
0
Gloucestershire
Cheltenham
Cotswold
Forest of Dean
Gloucester
Stroud
Tewkesbury
District
50-99 employees
100-249 employees
250-499 employees
500-999 employees
1000+ employees

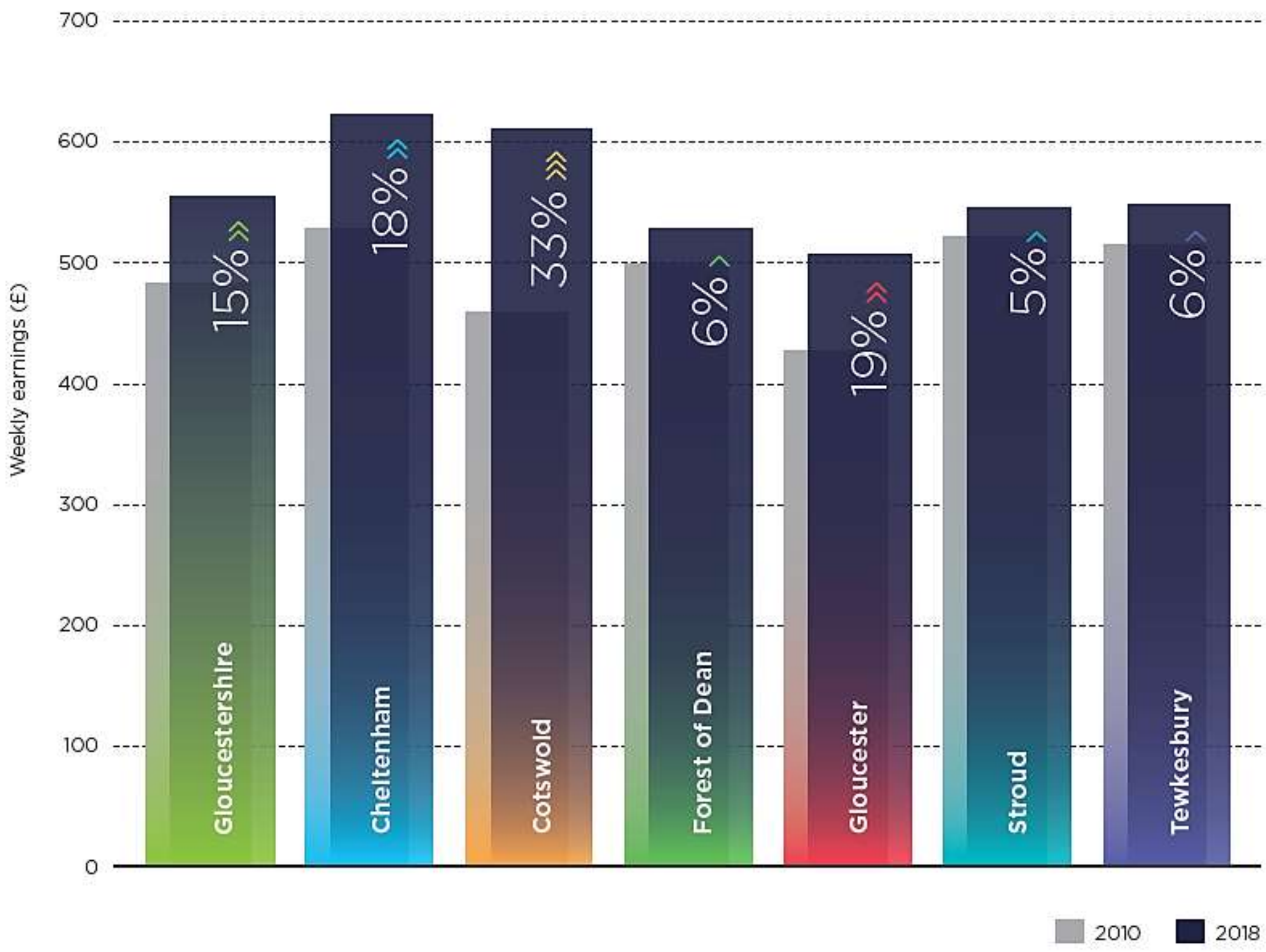
Small and micro business growth performance

Business formation, entrepreneurialism and start-up rates are high in Gloucestershire, and a healthy overall growth dynamic can be observed in terms of employee and business growth, though with weaker recent performance. The benefits of deep skills networks in surrounding areas such as Bristol and Oxfordshire provide growth businesses with access to mature skills but scaling up is proving challenging, as seen in the business structure of the area. Growth dynamics in these neighbouring areas have out-paced Gloucestershire, but this represents an opportunity for the future. Convergence with more dynamic neighbours is unlikely without addressing specific localised place constraints, however opportunities to harness the ‘pull-through’ effect from proximity to high-level industrial capabilities will continue to be explored.

The evidence has highlighted variations in performance between districts, with Cotswold and Cheltenham performing more strongly, possibly by harnessing a stronger set of skills and business environment assets. Locations such as Gloucester, which show less strong performance, have spare capacity and are likely to see greater dynamism as infrastructure and regeneration investment provide improved settings for scaling and growth spill-overs. The repurposing of traditional industrial stock and innovative rural and home working settings across the districts have potential to unlock further dynamism.

Across the county, though with important local trends, three relatively distinct groups of growth sectors can be observed, with knowledge intensive and micro-business sectors of ICT, professional scientific and technical leading performance. The numbers of micro-businesses in knowledge sectors are also driving private sector innovation activity in terms of the number of firms involved. This suggests there is potential for innovation networks and clusters to become stronger through networking.

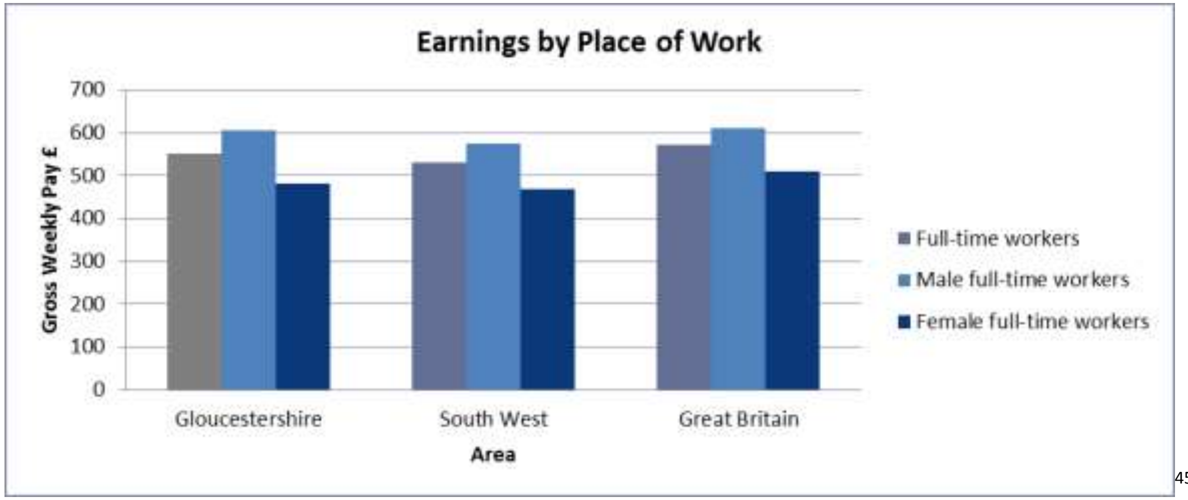
Employment Wage



Change in median weekly earnings, 2010-18

Gloucestershire had a median annual residential wage of £29,555 in 2018 (£555.90 weekly), which is lower than the England figure of £29,869 (£574.90 weekly) but higher than that of the South West £28,418 (£537.60 weekly). Gloucestershire has slightly higher median gross weekly pay for residents than workplace earnings (£555.90 against £550.70) suggesting some out-commuting to higher paying jobs.

[44]

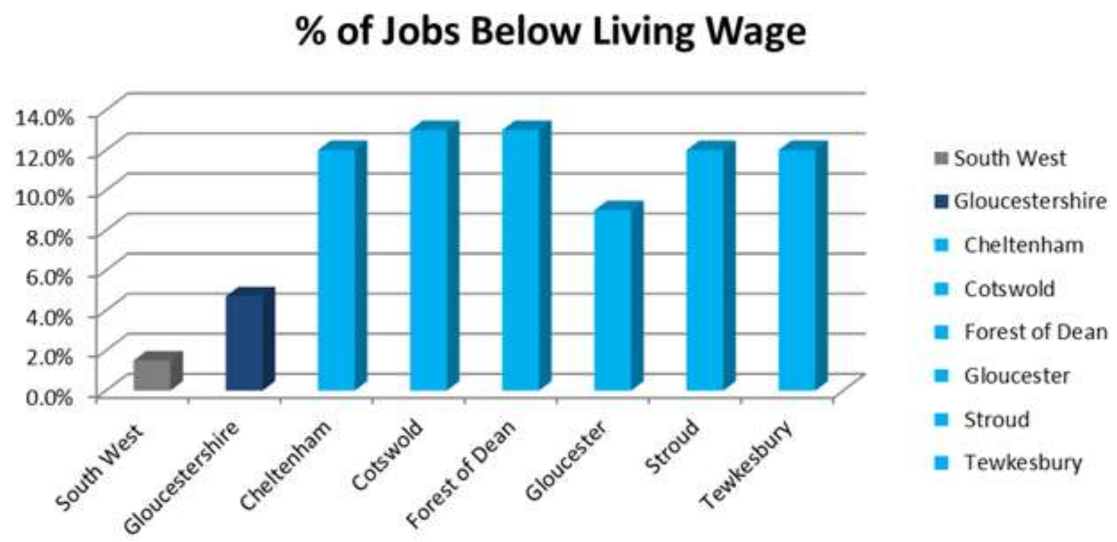


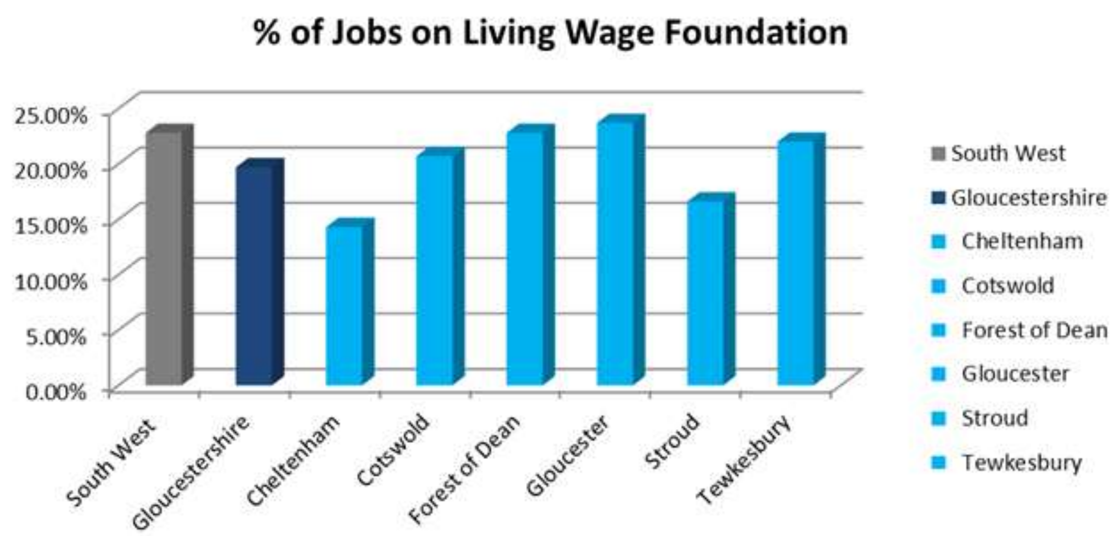
[45]

There are two main measures of earnings, workplace based earnings and residence base earnings. The difference between the two is often related to commuting patterns, areas with higher workplace based earnings tend to be centres of employment attracting commuters from elsewhere, while areas with higher residence based earnings are generally residential areas where people commute from. In 2018 median workplace-based gross annual earnings (before tax) for a full time worker working Gloucestershire was £28,636 this was slightly lower than residence-based gross annual earnings which stood at £28,906. This reflects the data around commuting which showed Gloucestershire is a net exporter of workers.

Both residence and workplace based earnings are higher than the regional averages but lower than the national averages.

[44] ONS annual survey of hours and earnings - resident analysis (2018)
[45] ONS annual survey of hours and earnings - workplace analysis (2018)

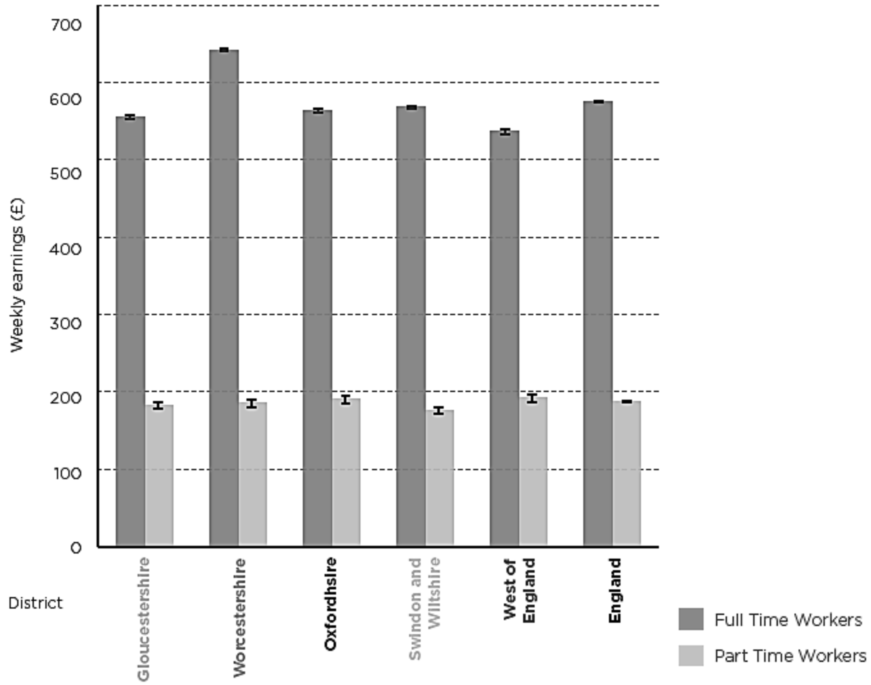




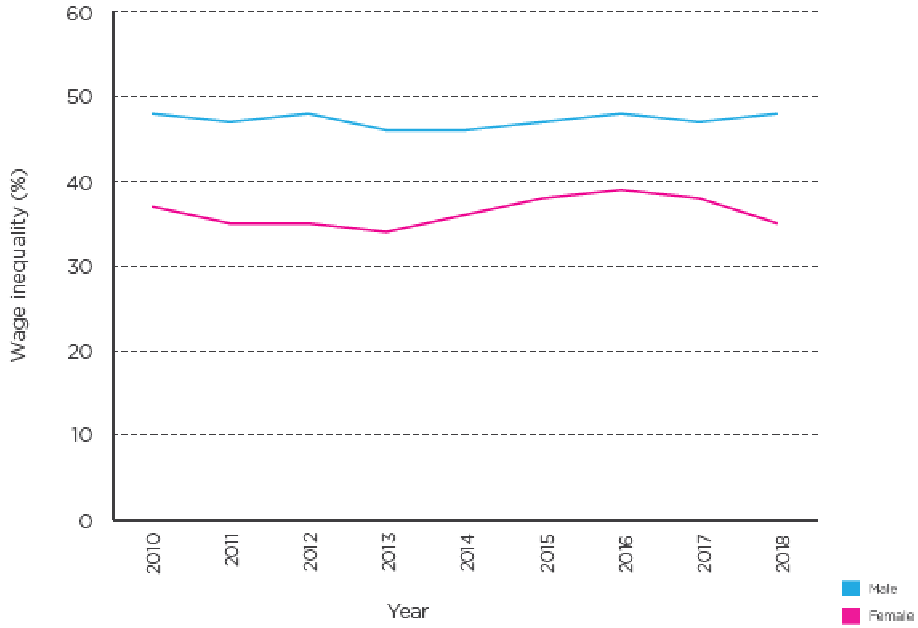
Living Wage Foundation - For all employees (below living wage)

Description	Living Wage Jobs (*)	Living Wage Per cent
United Kingdom	0.4	0.4%
Great Britain	0.4	0.4%
England and Wales	0.4	0.4%
England	0.4	0.4%
South West	1.6	1.5%
Gloucestershire	5.2	4.7%
Cheltenham	13	12.0%
Cotswold	14	13.0%
Forest of Dean	14	13.0%
Gloucester	10	9.0%
Stroud	13	12.0%
Tewkesbury	14	12.0%

Source: Annual Survey of Hours and Earnings (ASHE) – proportion of employee jobs with hourly pay below the living wage (by place of residence) and by industry by specified geographies (by place of work), UK, 2017 and 2018, *thousand



Full and part-time weekly earnings for Gloucestershire and comparator areas, 2018



Wage inequality between 25th and 75th percentile for men and women, 2010-18

Level and Rate of People aged 16 and Over on Zero Hour Contracts, by Region – April to June (each Year)

UK, not seasonally adjusted

2019	In employment on a zero-hours contract (thousands)	Percentage of people in employment on a zero-hours contract
UK	896	2.7 *
England	760	2.7 *
North East	25	2.1 ****
North West	69	2.0 ***
Yorkshire and The Humbe	71	2.8 ***
East Midlands	92	3.9 ***
West Midlands	73	2.6 ***
East of England	88	2.8 ***
London	106	2.3 ***
South East	153	3.3 ***
South West	83	2.9 ***
Wales	50	3.4 ***
Scotland	70	2.6 ***
Northern Ireland	16	1.8 ***

2018	In employment on a zero-hours contract (thousands)	Percentage of people in employment on a zero-hours contract
UK	781	2.4 *
England	671	2.5 *
North East	26	2.2 ****
North West	77	2.2 ***
Yorkshire and The Humber	68	2.6 ***
East Midlands	65	2.9 ***
West Midlands	74	2.6 ***
East of England	82	2.7 ***
London	95	2.1 ***
South East	105	2.3 ***
South West	80	2.9 ***
Wales	37	2.5 ***
Scotland	64	2.4 ***
Northern Ireland	9	1.0 ****

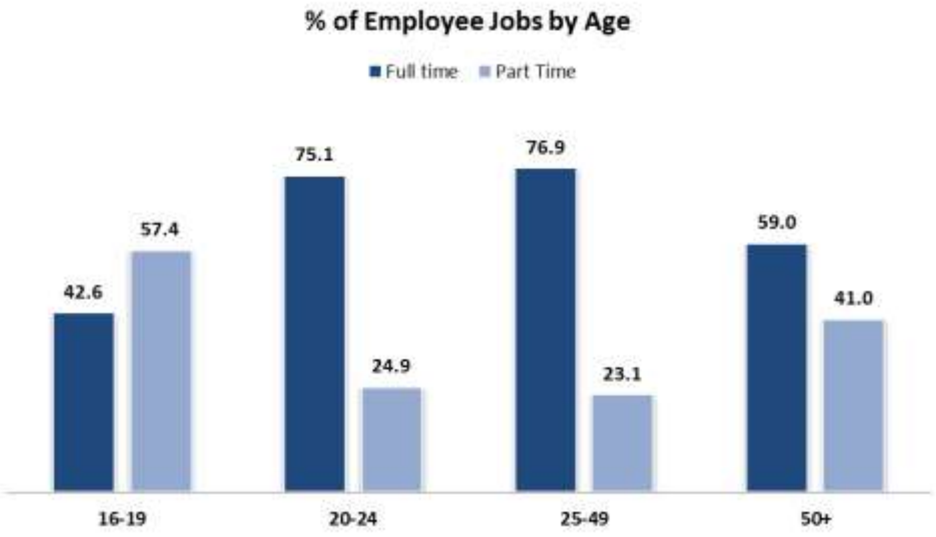
Source: ONS Labour Force Survey

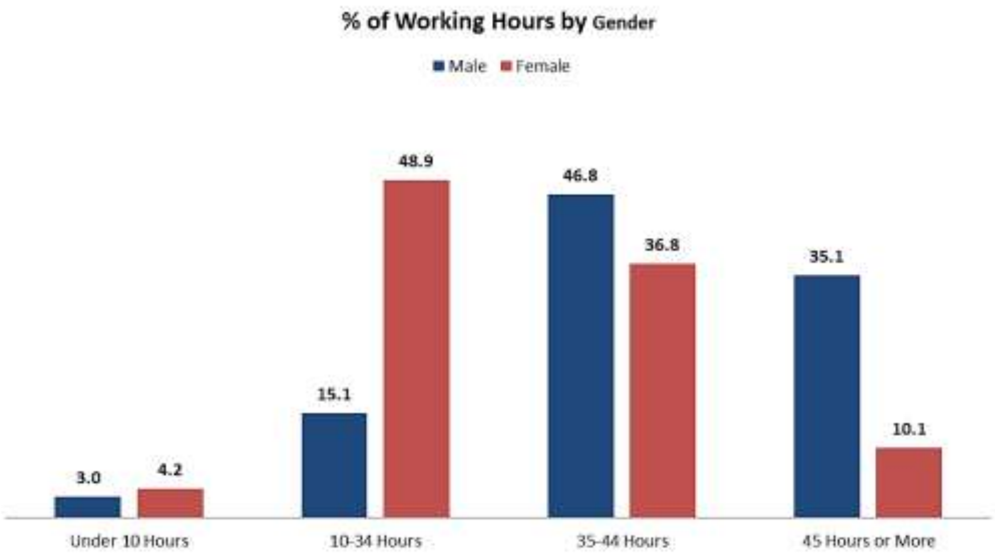
Guide to quality:

The coefficient of variation (CV) indicates the quality of an estimate; the smaller the CV the higher the quality. The true value is likely to lie within +/- twice the CV.

Key	Coefficient of variation (%)	Statistical robustness
*	$0 \le CV < 5$	Estimates are considered precise.
**	$5 \le CV < 10$	Estimates are considered reasonably precise.
***	$10 \le CV < 20$	Estimates are considered acceptable.
****	$CV \ge 20$	Estimates are considered too unreliable for practical purposes.

Employee Hours

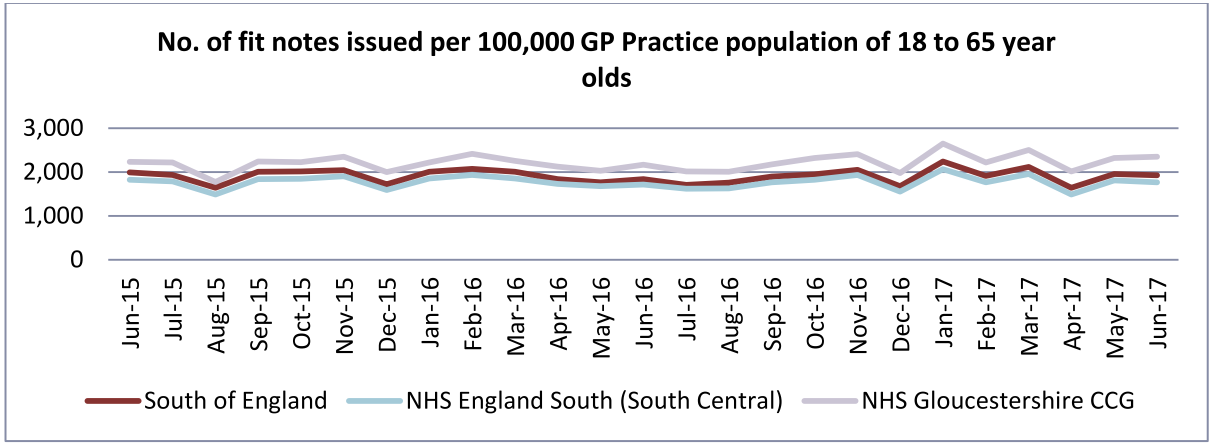


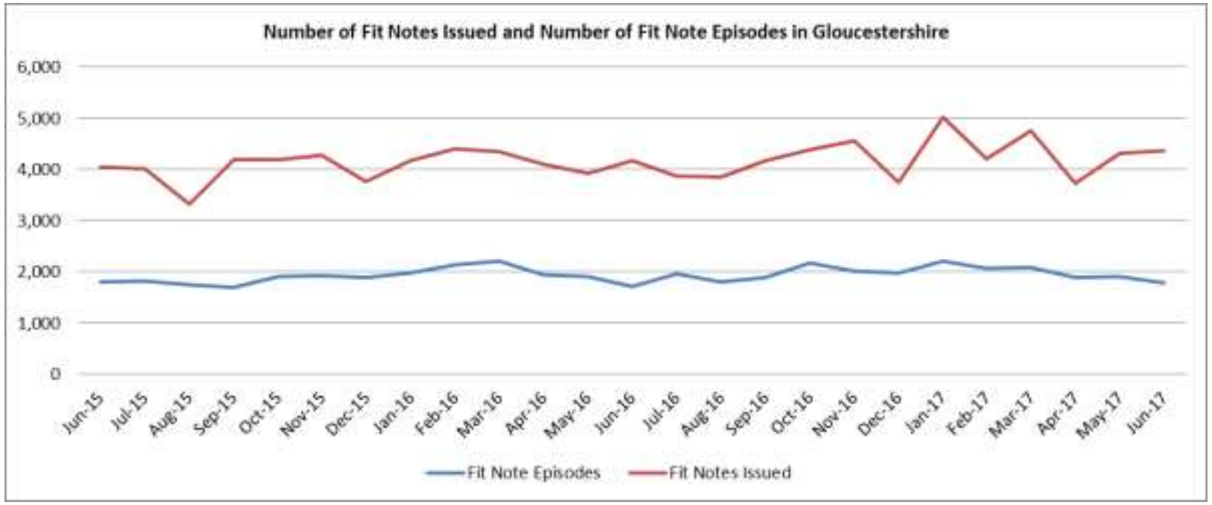


[46]

[46] Source: ONS, Annual Population Survey

Employee Health





[47]

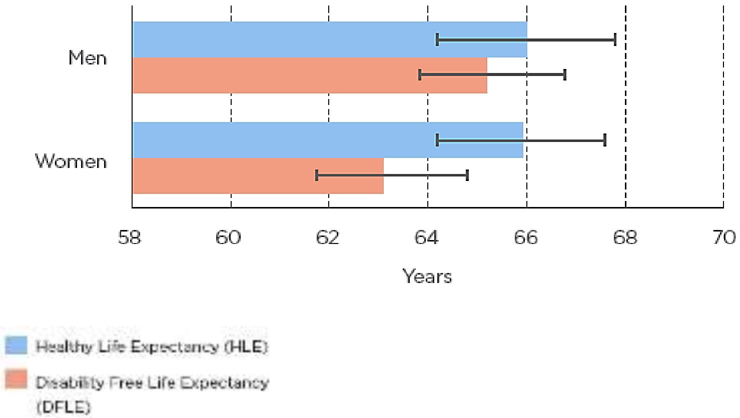
The health of an individual is influenced by their lifestyle, the environment they live in – including access to health care services and their genetics. The risk of developing poor health increases with poor diet, low levels of physical inactivity, smoking and excessive alcohol consumption.

Gloucestershire is broadly in line with national and regional levels for alcohol related admissions to hospital, levels of physical activity and overweight or obese adults.

Overall, the health of people living in Gloucestershire is better than the England average. However, there are areas of Gloucestershire where residents experience poorer health than the England average.

Additionally, the health of people living in Gloucestershire has not been improving over time as seen in other parts of the country.

Source: *Public Health Outcomes Framework, Public Health England,*



[47] NHS Digital, Fit notes issues by GP practices https://digital.nhs.uk/data-and-information/publications/statistical/fit-notes-issued-by-gp-practices/fit-notes-issued-by-gp-practices-england-june-2017

Commuting and Flexibility

As a rural economy, according to the 2011 Census, Gloucestershire has a heavy reliance on cars for commuting, with less reliance on public transport. In every district, the number of people commuting by car or van is over 50%, with over two thirds of residents of the Forest of Dean using a car or van (67%). There is a limited number of individuals using other methods of transport, with comparatively more commuting on foot and cycling in Cheltenham and Gloucester than in the more rural districts. There is a higher proportion of individuals working from home in the more rural areas of Cotswold and the Forest of Dean. The limited bus use in the more rural districts is clear, as there is almost no usage for commuting in these places.

A significant number of contracted school transport services also operate across Gloucestershire. In the region of 8,000 young people per day travel throughout the county on bus services funded by the Council and another 77,000 finding their own way including use of local bus services, privately commissioned school transport, cycling walking and car.

There is an increasing trend towards a widening of travel patterns, spread across a broad range of origins and destinations, with ‘pull’ destinations such as Swindon, Bristol, Birmingham and Cardiff drawing people out of the county for their shopping, leisure and employment. Equally Gloucestershire is strengthening itself as an economic powerhouse with major businesses choosing to locate, stay or develop in the county and a strong increase in the number of Small and Medium Enterprises (SME) and start-up businesses.

The number of non-car households in the county is 17% - lower than the national average of 26%. The percentage of cycle to trips in Gloucestershire (4.5%) is above the national average (2%). The number of cycle to work trips in Gloucester, Cheltenham and Tewkesbury is particularly high. [48]

Residents accessing Further Education (FE) Colleges. Over 1 in 4 Forest of Dean residents either live over a 45 minute bus drive away or cannot access an FE College and this ratio is marginally higher in the Cotswolds (1 in every 3 residents).

In 2011, of the 240,320 residents aged 16 and over in Gloucestershire who commuted to work, some 83.1% equating to 199,735 people worked within the county.

Proportion of Households with No Cars or Vans

Ward Name 2011	Local Authority	No Cars or Vans in Household %
Barton and Tredworth	Gloucester	40
Westgate	Gloucester	40
St Paul's	Cheltenham	39.4
Oakley	Cheltenham	34.8
Cirencester Park	Cotswold	34.2
Podsmead	Gloucester	33.9
Kingsholm and Wotton	Gloucester	33.8
Matson and Robinswood	Gloucester	33.5
Hesters Way	Cheltenham	30.2
St Mark's	Cheltenham	29.6

[48] Gloucestershire Local Transport Plan 2015-2031

Proportion of Residents Accessing Primary Schools When Using Public Transport

Primary School	Population who live OVER 45 minutes away %	Population who live UNDER 45 minutes away %
Cheltenham	0.2%	99.8%
Cotswold	11.2%	88.8%
Forest of Dean	3.0%	97.0%
Gloucester	0.0%	100.0%
Stroud	1.1%	98.9%
Tewkesbury	2.5%	97.5%
Gloucestershire	2.5%	97.5%

Proportion of Residents Accessing Secondary Schools When Using Public Transport:

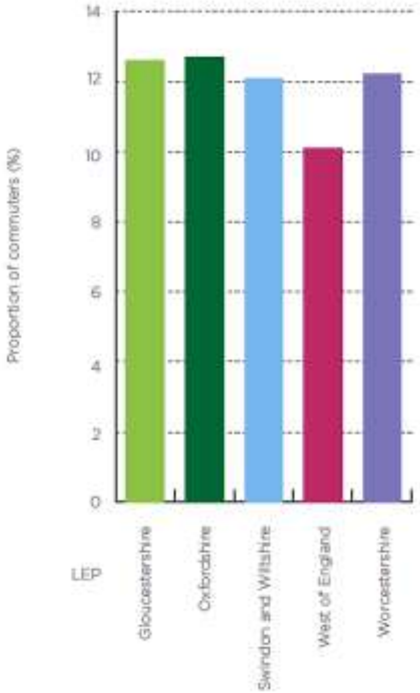
Secondary School	Population who live OVER 45 minutes away %	Population who live UNDER 45 minutes away %
Cheltenham	0.3%	99.7%
Cotswold	24.3%	75.7%
Forest of Dean	7.2%	92.8%
Gloucester	0.0%	100.0%
Stroud	2.6%	97.4%
Tewkesbury	4.7%	95.3%
Gloucestershire	5.5%	94.5%

Proportion of Residents Accessing Further Education Colleges When Using Public Transport

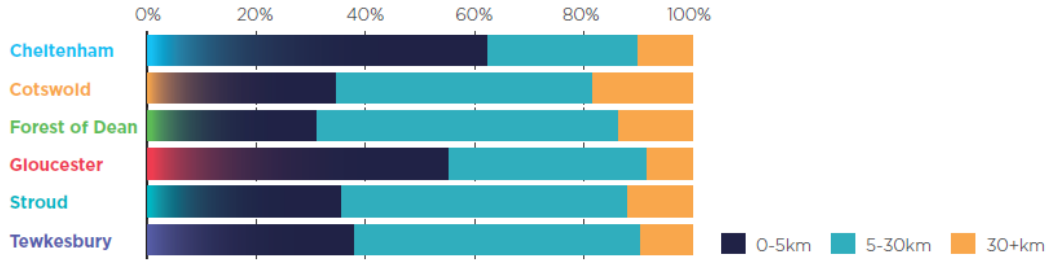
FE College	Population who live OVER 45 minutes away %	Population who live UNDER 45 minutes away %
Cheltenham	0.2%	99.8%
Cotswold	33.4%	66.6%
Forest of Dean	28.9%	71.1%
Gloucester	0.0%	100.0%
Stroud	3.0%	97.0%
Tewkesbury	5.6%	94.4%
Gloucestershire	9.9%	90.1%

Just over 19% of jobs in Gloucestershire are advertised with a flexible working option, which is already ahead of the South West region at 18% and the UK at 15%[49], but as many as 87% of people nationally want to work flexibly. 67.5% of young people surveyed believe that flexible working will be important to them in the future. Flexible working is a means of improving productivity through improved mental health, better workforce diversity, reduced commuting time and lowering cost of travel, and should be central to a firm's recruitment practices.

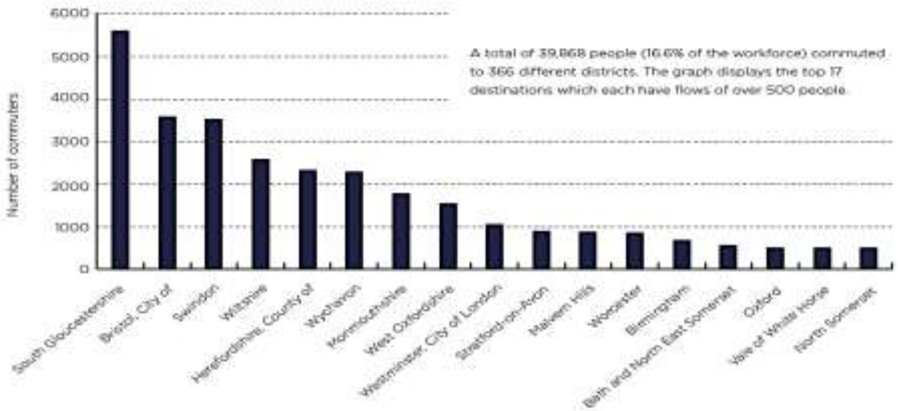
Home Working, 2011



Commuting Distance by District, 2011

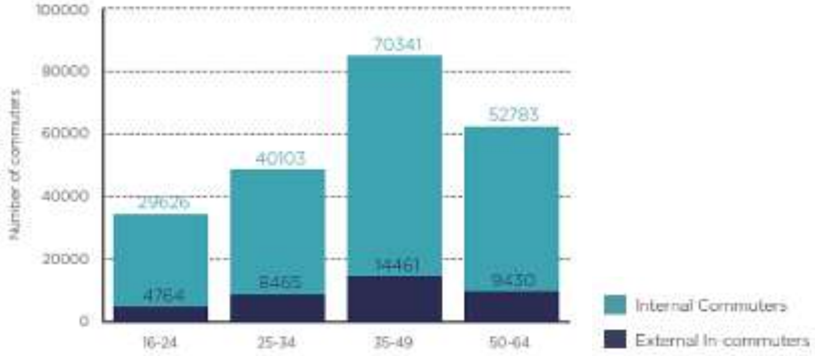


Gloucestershire out-commuting destinations with over 500 daily commuters, 2011



49 Analysis derived from Burning Glass labour market data for January to December 2018, Gfirst LIS draft 2019

Age Profile of Gloucestershire internal commuters and external in-commuters, 2011

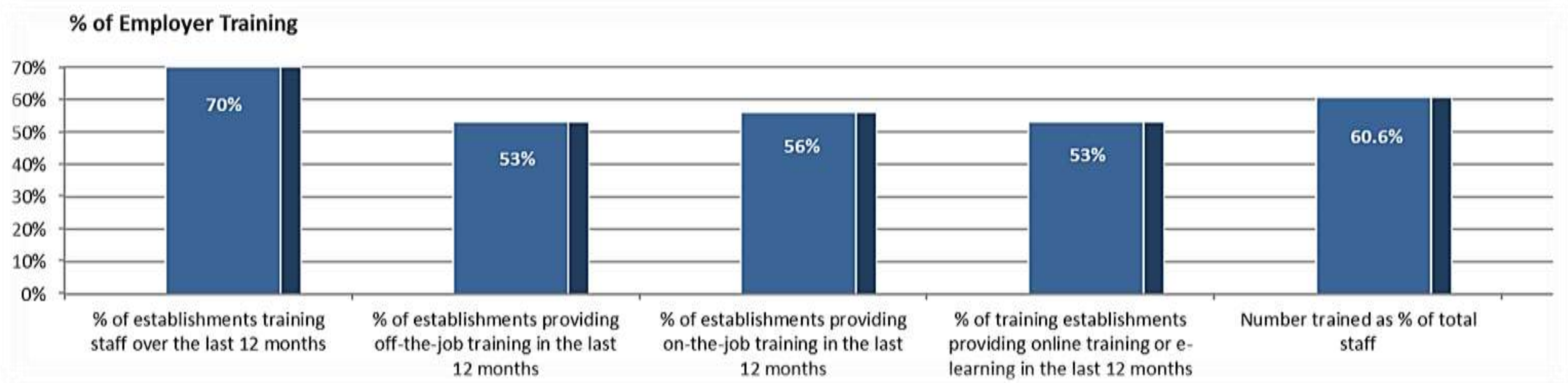


The 2011 Census shows that 239,603 Gloucestershire residents commuted on the day of the Census. Of these commuters, 199,735 or 83.4% went to a workplace within Gloucestershire.

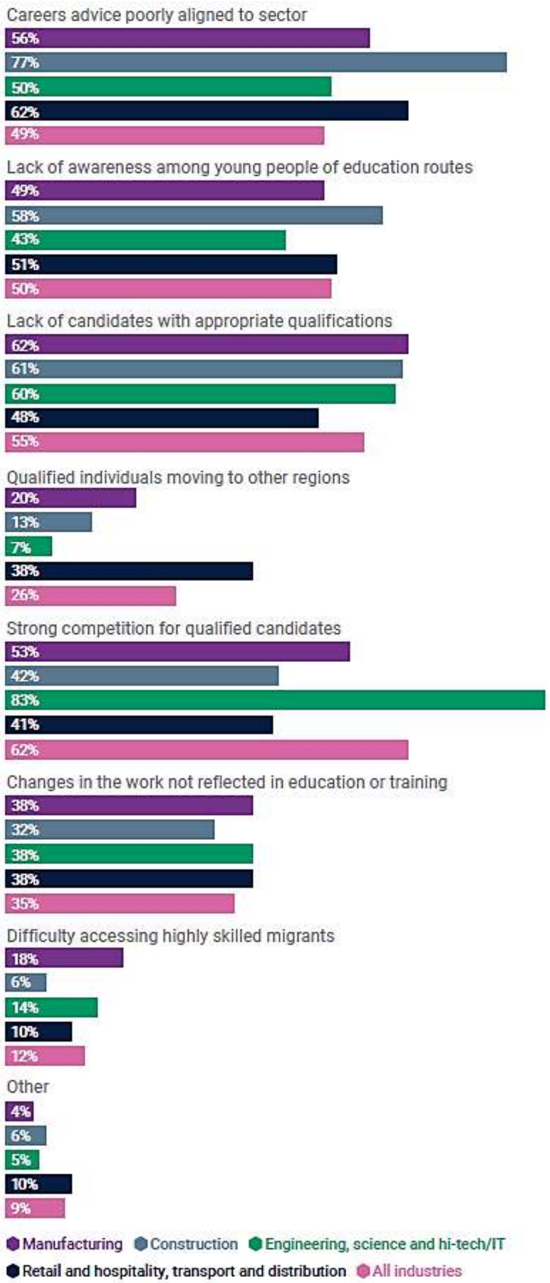
The level of self-containment of the labour market is high, and especially so in the Forest of Dean. Self-containment is lowest in the three most closely bounded urban districts of Gloucestershire, due to strong internal cross-commuting between these locations.

The two largest age groups (25–34- and 35–49-year-olds) active in the labour market have higher shares of workers from outside Gloucestershire.

Employer Training



Main Divers of Skills Gaps Reported by Employers and Sector – Nationwide (UK)

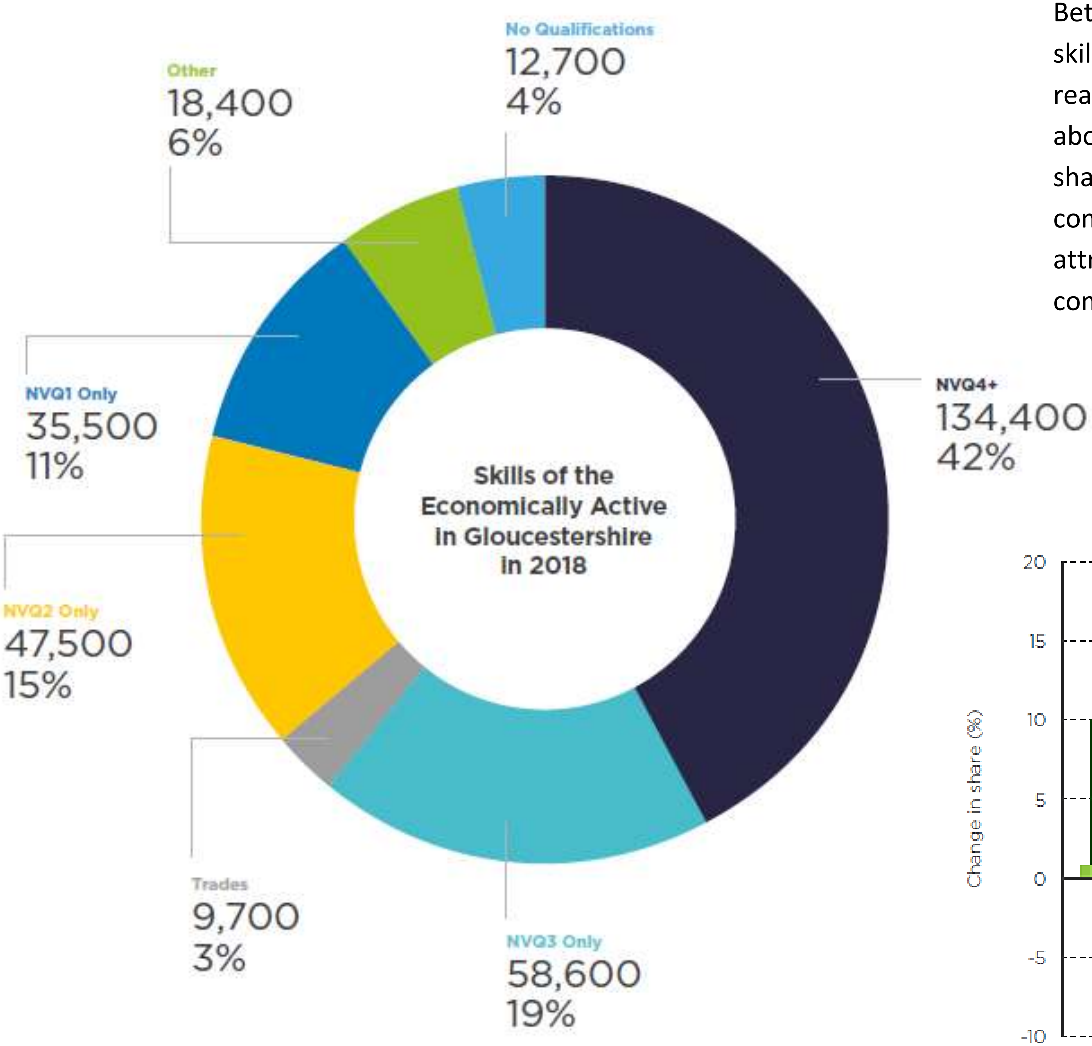


Source: CBI/Pearson Education and Skills Survey 2017

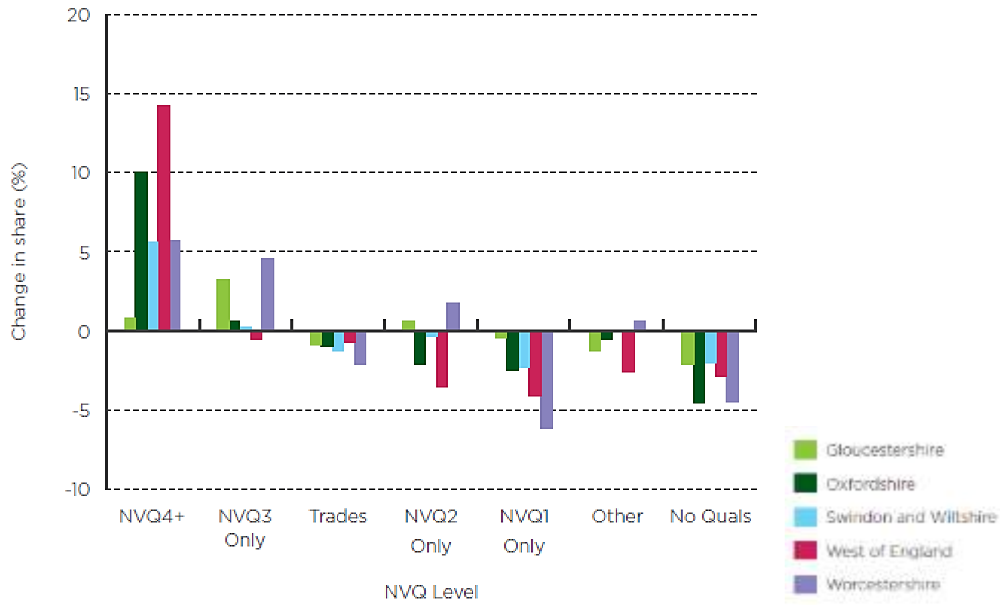
The increasing demand for high skilled roles is a concern for many employers. In 2017, three quarters of businesses surveyed in the CBI/Pearson Education and Skills Survey expected to have more job openings for people with higher level skills over the coming years, and 61% expressed a lack of confidence that there will be enough people available in the future with the necessary skills to fill their high-skilled job vacancies.

Strong competition for candidates with appropriate qualifications (62%) and a lack of candidates with appropriate qualifications (55%) were identified as the most widespread cause of the skills gap, but ranking almost as high was lack of awareness among young people of education routes to enter particular careers (50%) and careers advice poorly aligned to the sector (49%). Notably, the proportion of employers reporting a lack of candidates with appropriate qualifications was much higher among the manufacturing, construction, and engineering, science and hi-tech/IT sectors than on average.

Employee Qualifications

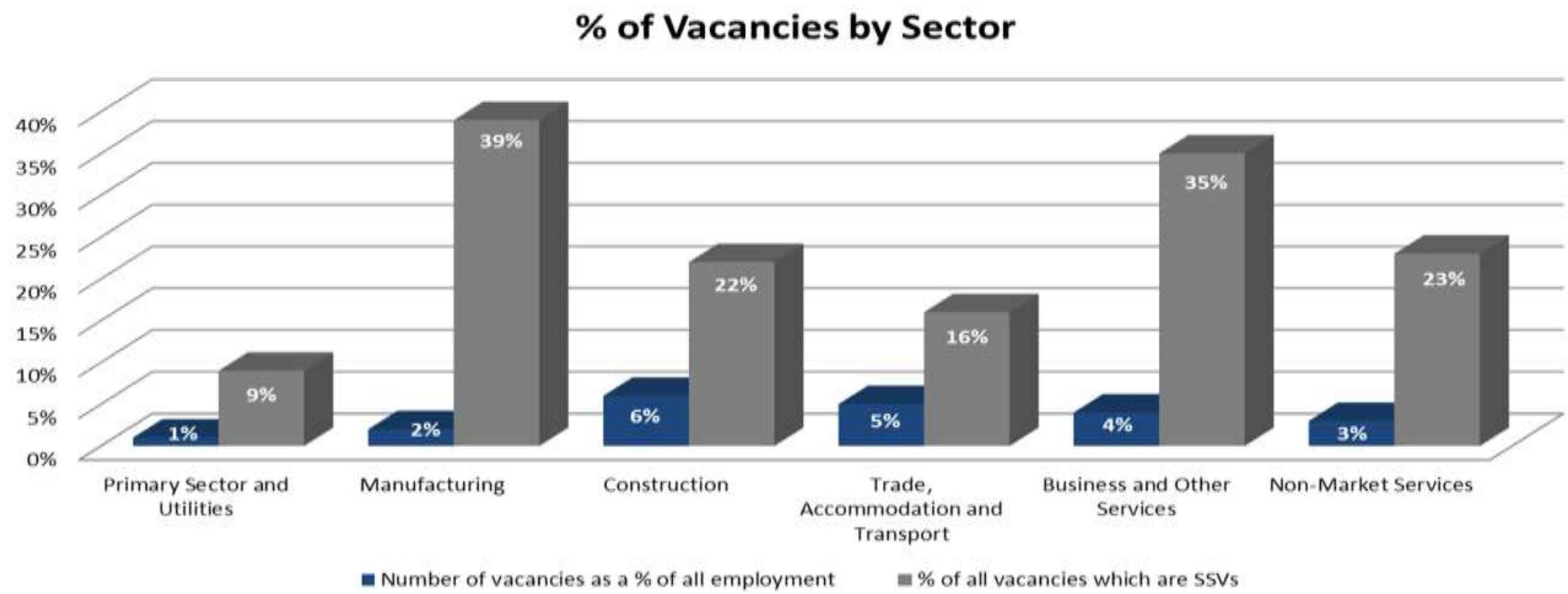


Between 2010 and 2018 the number of people with NVQ4+ higher level skills in the Gloucestershire labour market increased by 10,200 people to reach 134,400, which is 42% of the economically active population. This is above the South West (41.9%) but below England (43.5%). The change in share between 2010 and 2018 for different skill levels in Gloucestershire compared with its LEP neighbours shows that Gloucestershire has not attracted and retained those with higher skills to the same extent as comparator LEP areas, especially the West of England.



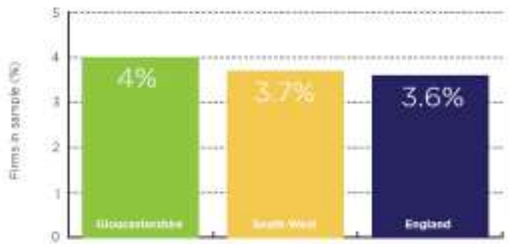
Change in share: skills of those economically active, 2010-18

Job Vacancies

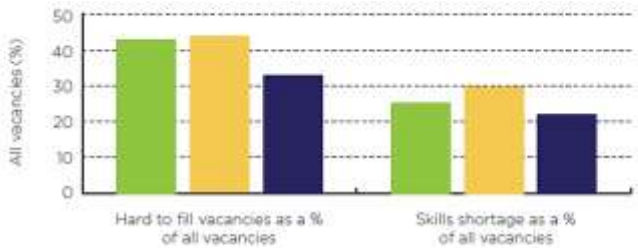


Gloucestershire has a higher incidence of firms reporting vacancies than nationally and regionally – with 28% of firms reporting at least one vacancy[50] and 43% of these classed as 'hard to fill'.[51] The main reasons for hard-to-fill vacancies are low number of applicants with required skills, as well as a lack of qualifications or work experience required by the employer. This is broadly the same pattern as was witnessed across England as a whole.[52]

Density of vacancies, 2017



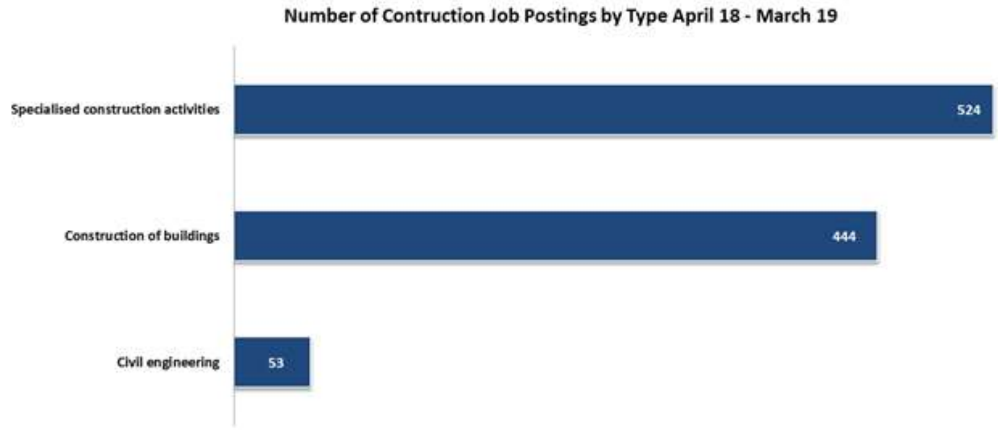
Hard to fill and skills shortage vacancies as % of vacancies, 2017

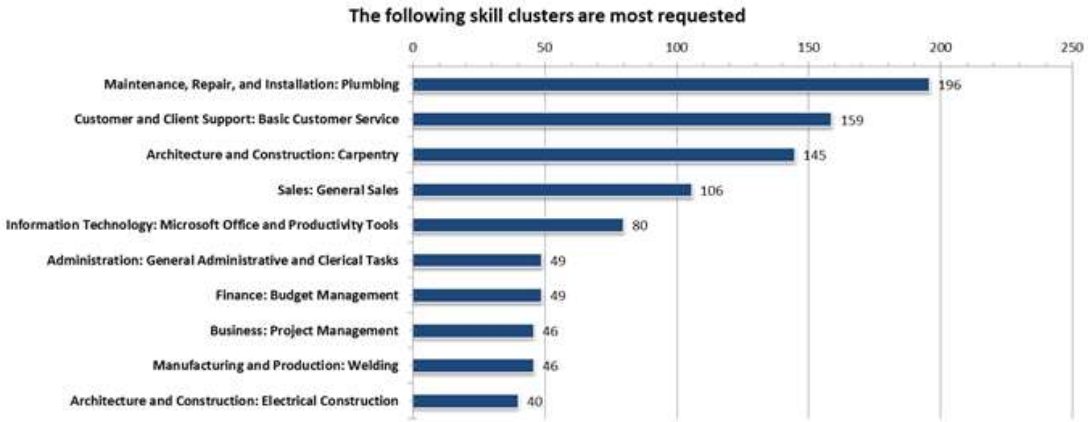


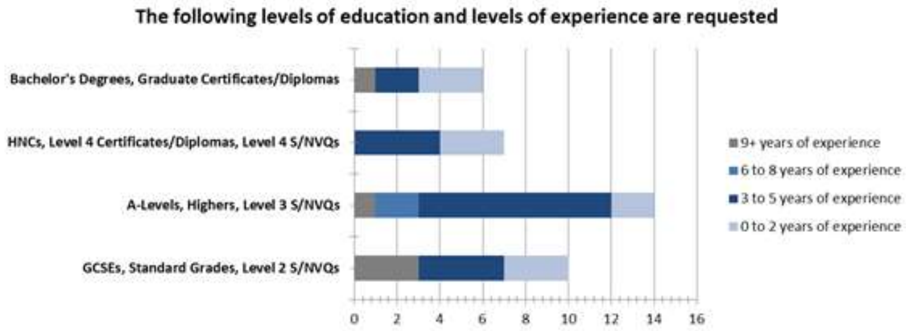
[50] 20% nationally and 21% in the South West region
[51] Gloucestershire Five Foundations of Productivity Evidence Report
[52] LMI Summary – Working Futures 2012-2022

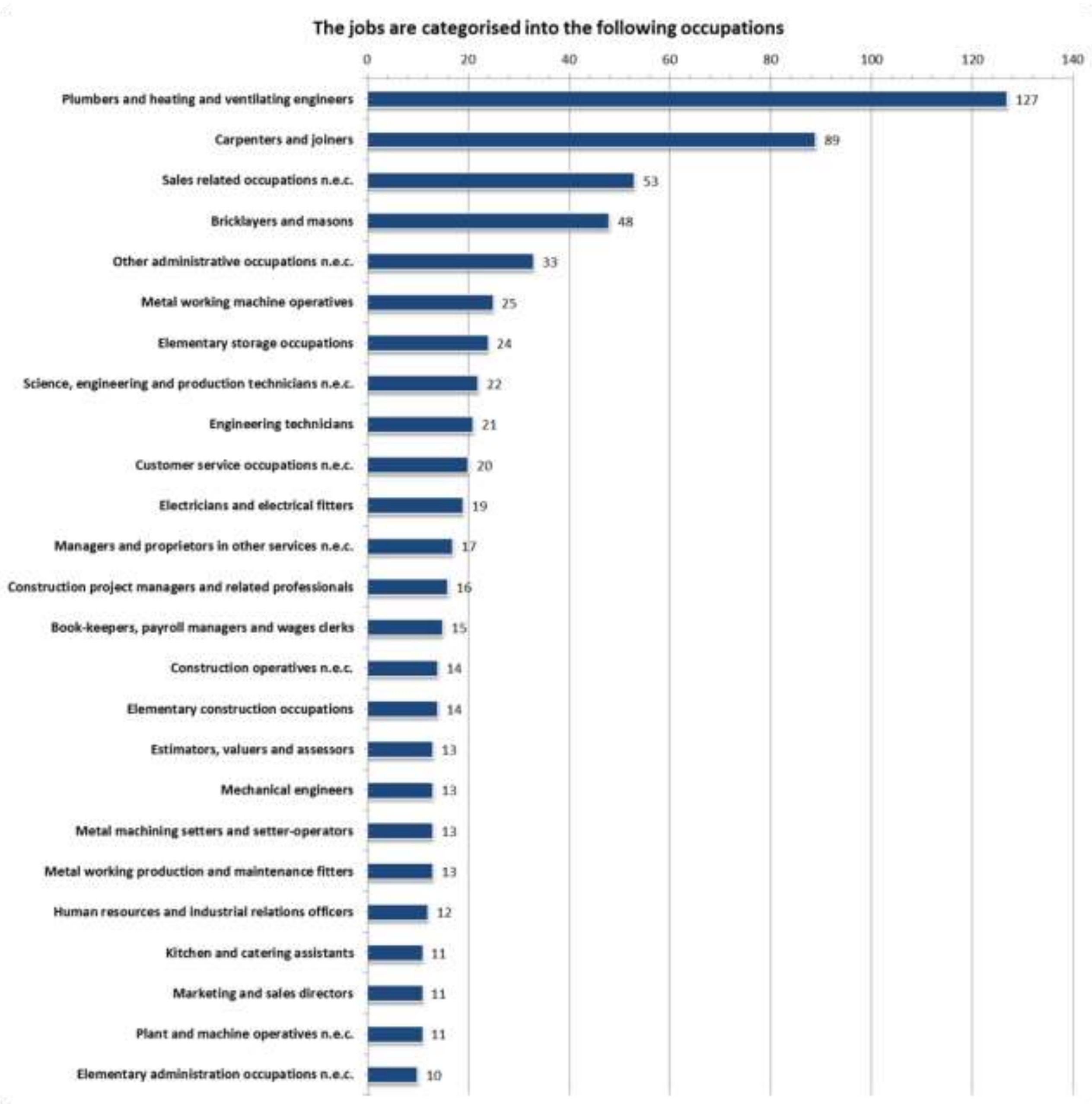
Vacancies by Sector

Construction

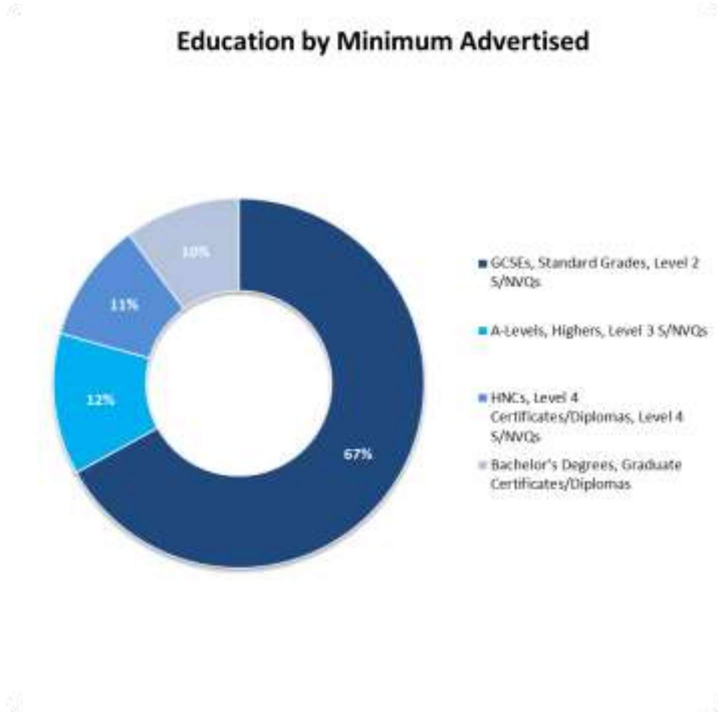








	Demand and Employment			Salary	
	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	No of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Plumbers and heating and ventilating engineers	127	Low Risk	186,600	£34,434	£30,341
Carpenters and joiners	89	Medium Risk	238,300	£34,579	£26,017
Sales related occupations n.e.c.	53	Medium Risk	59,200	£24,144	£20,301
Bricklayers and masons	48	High Risk	79,400	£38,946	£23,596
Other administrative occupations n.e.c.	33	High Risk	802,500	£22,493	£17,453
Metal working machine operatives	25	Medium Risk	66,300	£25,151	£22,957
Elementary storage occupations	24	Medium Risk	449,100	£18,622	£20,248
Science, engineering and production technicians n.e.c.	22	Medium Risk	48,700	£29,072	£27,478
Engineering technicians	21	Low Risk	110,900	£27,401	£35,295
Customer service occupations n.e.c.	20	Medium Risk	312,900	N/A	£17,029

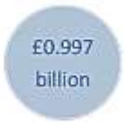


Source: Burning Glass Labour Insight Tool

Active Selections: Apr. 1, 2018 - Mar. 31, 2019 AND (LEP : Gloucestershire) AND (SIC Code : 41 OR SIC Code : 42 OR SIC Code : 43)

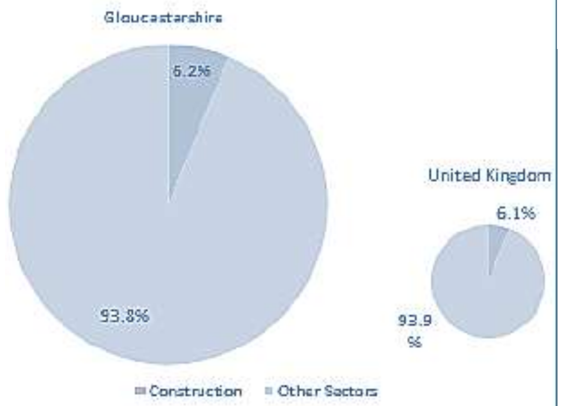
Just over a third of the workforce in the GFirst LEP area are located within the Gloucester a)city local authority area. Current construction workforce in the GFirst LEP area is estimated at just over 29,000. Recent employment numbers show that construction employment fell in both the South West as a whole and within the LEP area but the fall in the LEP area was lower. Around 52 training providers have delivered construction relevant FE courses within the GFirst LEP area over the last four academic years. There are two main providers delivering 79% of the provision; Gloucestershire College and South Gloucestershire and Stroud College. The GFirst LEP area construction workforce grew by 2% between 2012 and 2016, slightly above the South West rate of 1%. There has been a 9% increase in the number of micro sized construction businesses from 2012 to 2016 within the GFirst LEP area accounting for almost all (96%) of the growth in construction businesses in the LEP area over this period. Self-employment fell to 35% in 2016 from 51% in 2012.[53]

Gross Value Added (2015)

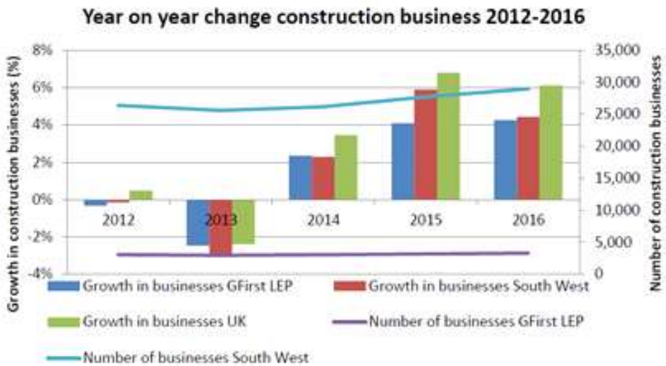


The sector is estimated to be worth £0.997 billion to the Gloucestershire economy.

Contribution of the construction sector to GVA



Regional Gross Value Added (Income Approach) (2015)



Source: NOMIS – August 2017

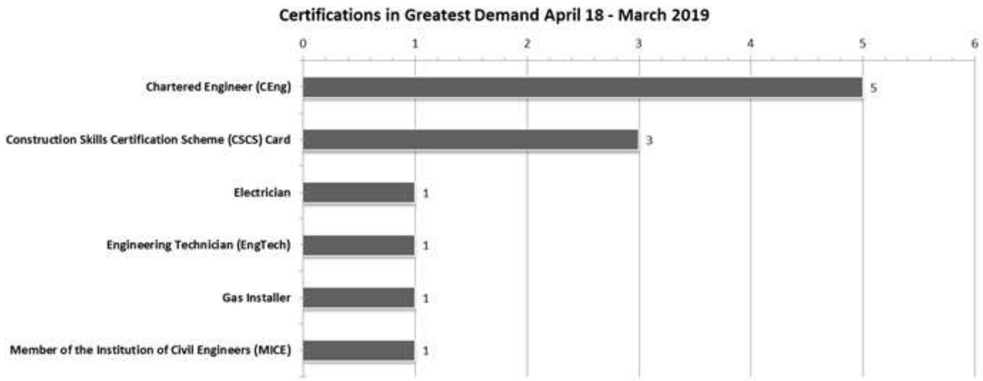
Construction Skills – Top 6 Training Providers (above 2%) within the GFirst LEP area

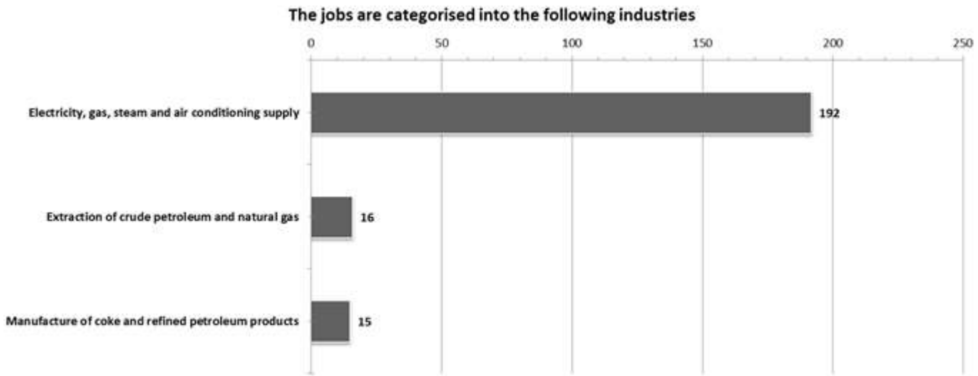
Provider	2012/13	2013-14	2014-15	2015-16	Total	% Share of Total Quals
Gloucestershire College	1,119	1,392	889	562	3,962	63.5%
South Gloucestershire and Stroud College	281	290	214	175	960	15.4%
Bridge Training Limited	117	53	7	29	206	3.3%
Prospect Training Services (Gloucester) Limited	91	66	18	21	196	3.1%
Birmingham Metropolitan College		149			149	2.4%
Petroc			137		137	2.2%

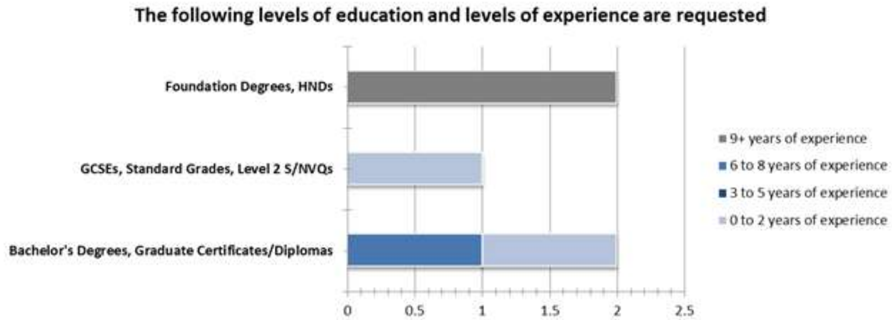
Source: CITB/SFA

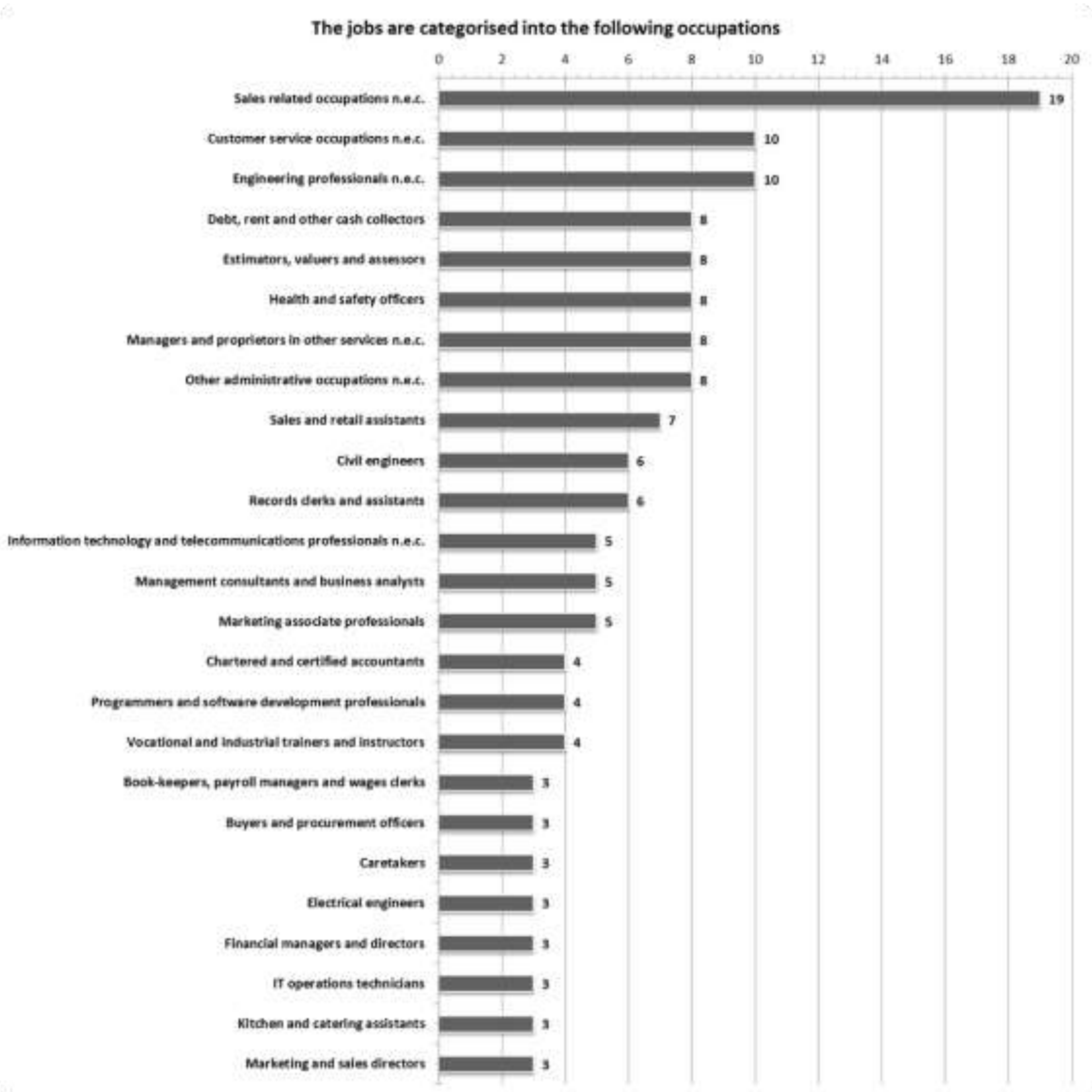
[53] Construction Skills Gap Analysis, June 18

Energy Sector

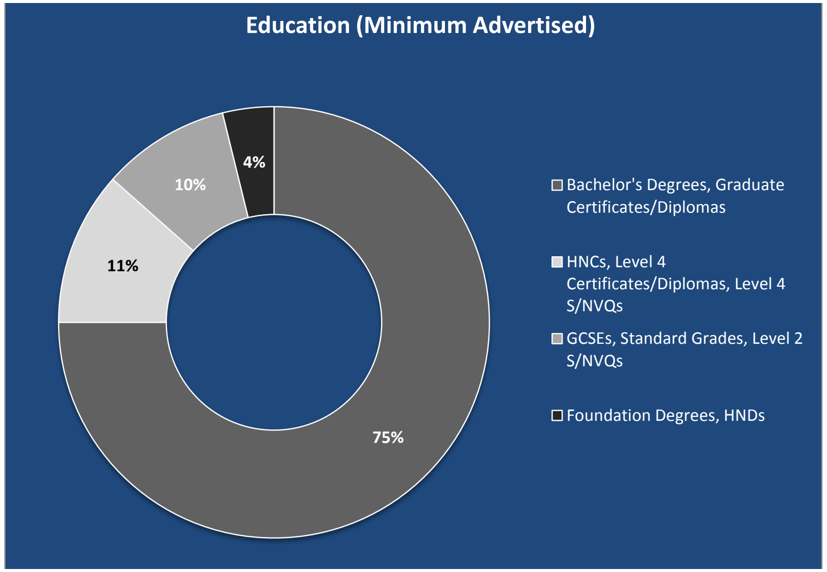








	Demand and Employment			Salary	
	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Sales related occupations n.e.c.	19	Medium Risk	59,200	£33,467	£20,301
Engineering professionals n.e.c.	10	Low Risk	122,500	N/A	£42,981
Customer service occupations n.e.c.	10	Medium Risk	312,900	N/A	£17,029
Managers and proprietors in other services n.e.c.	8	Low Risk	211,200	N/A	£34,092
Health and safety officers	8	Low Risk	61,300	N/A	£35,289
Other administrative occupations n.e.c.	8	High Risk	802,500	N/A	£17,453
Debt, rent and other cash collectors	8	High Risk	22,500	N/A	£18,384
Estimators, valuers and assessors	8	High Risk	62,700	N/A	£32,101
Sales and retail assistants	7	Medium Risk	1,095,300	N/A	£11,947
Civil engineers	6	Low Risk	76,900	N/A	£42,712



Source: Burning Glass Labour Insight

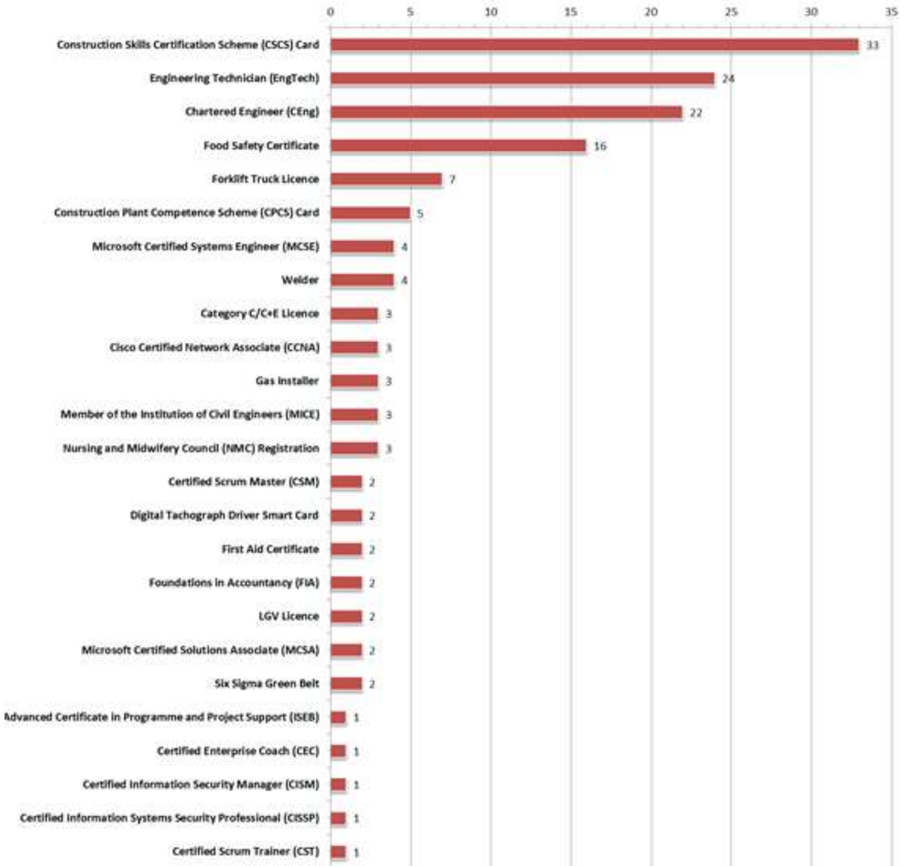
Query conditions

Apr. 1, 2018 - Mar. 31, 2019 AND (LEP : Gloucestershire) AND (SIC Code : 35.1 OR SIC Code : 35.2 OR SIC Code : 35.3 OR SIC Code : 24.46* OR SIC Code : 05 OR SIC Code : 06 OR SIC Code : 19*)

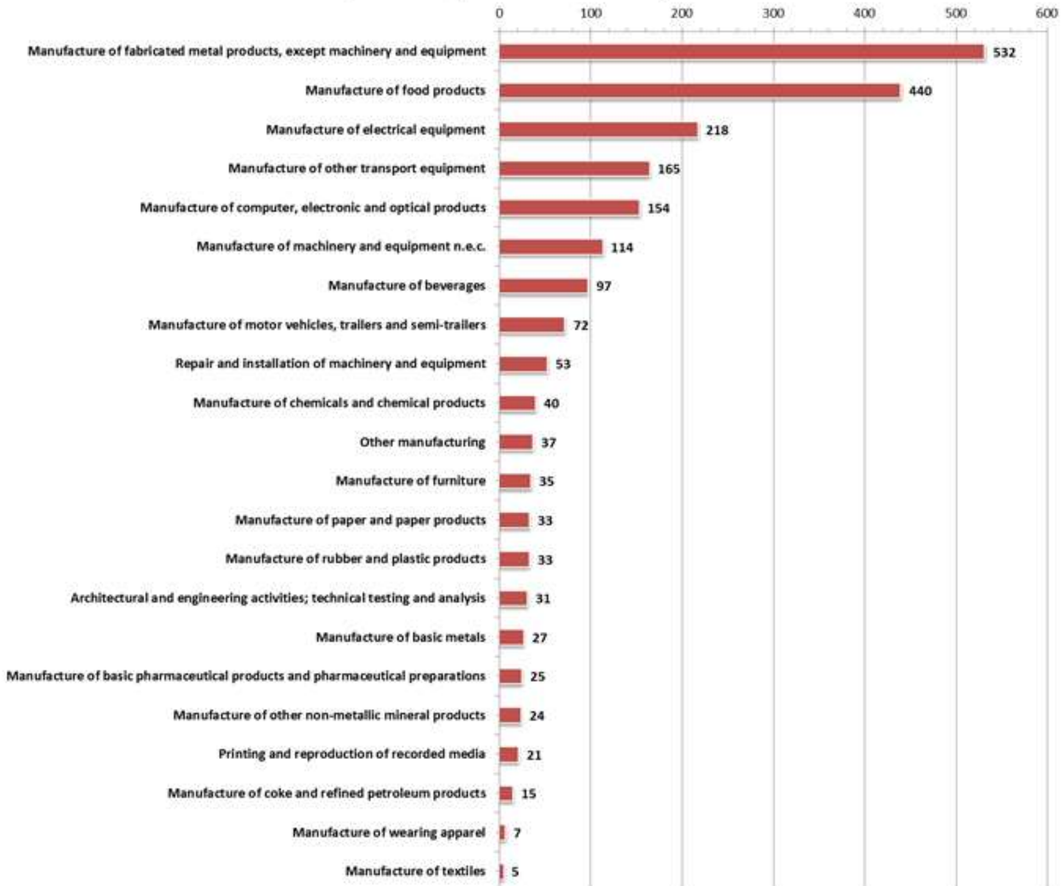
*These SIC Codes also feature in the manufacturing sector

Manufacturing

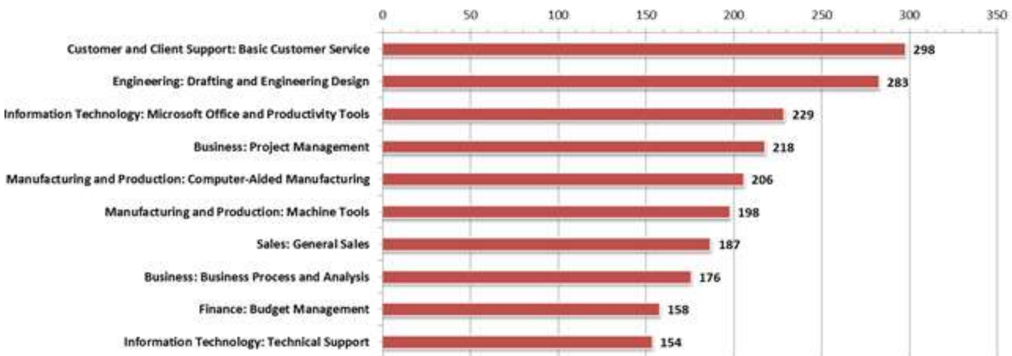
Certifications in Greatest Demand April 2018 - March 2019



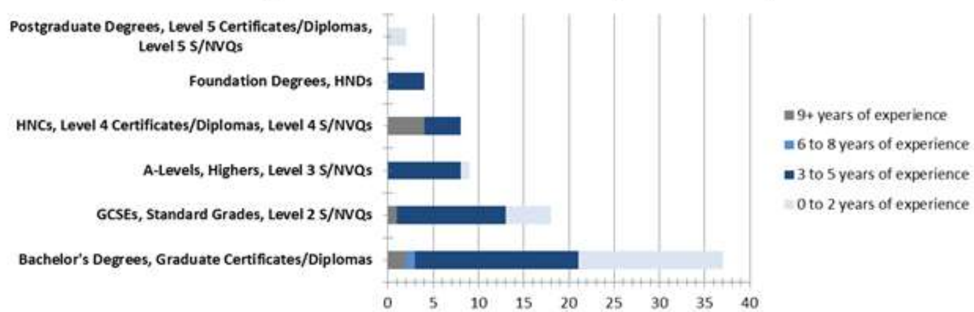
The jobs are categorised into the following industries

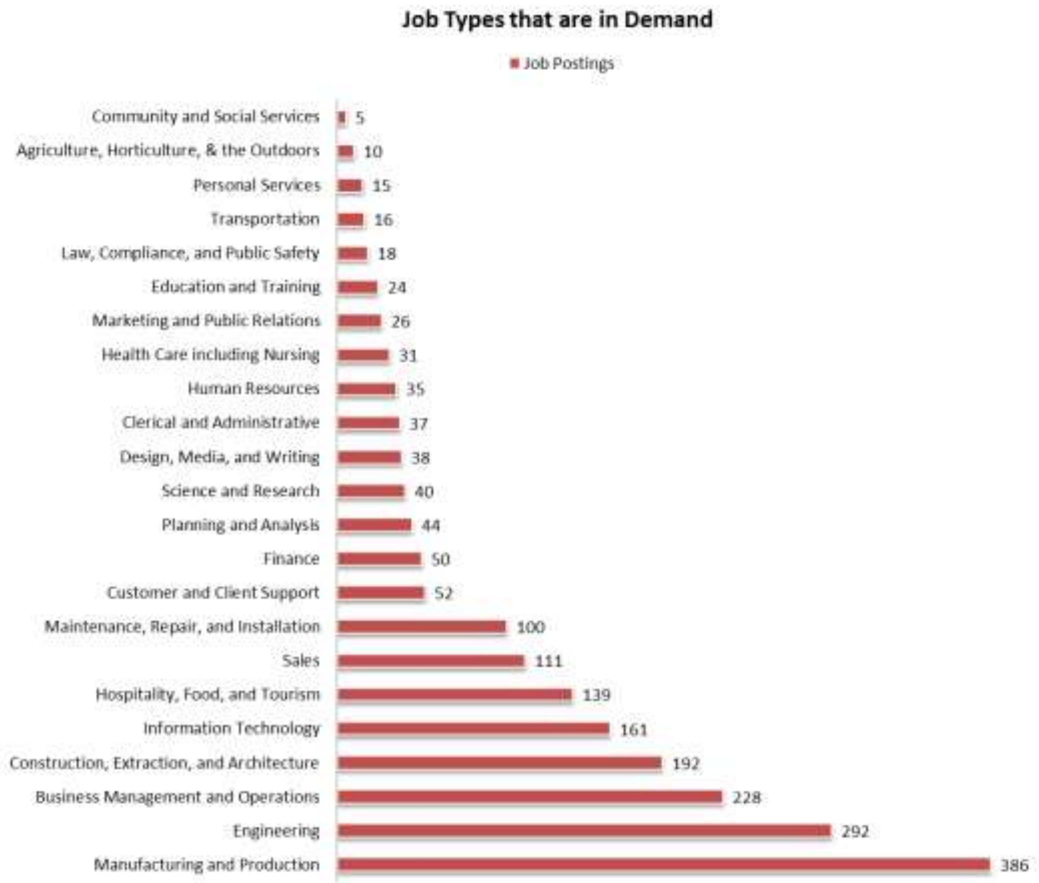


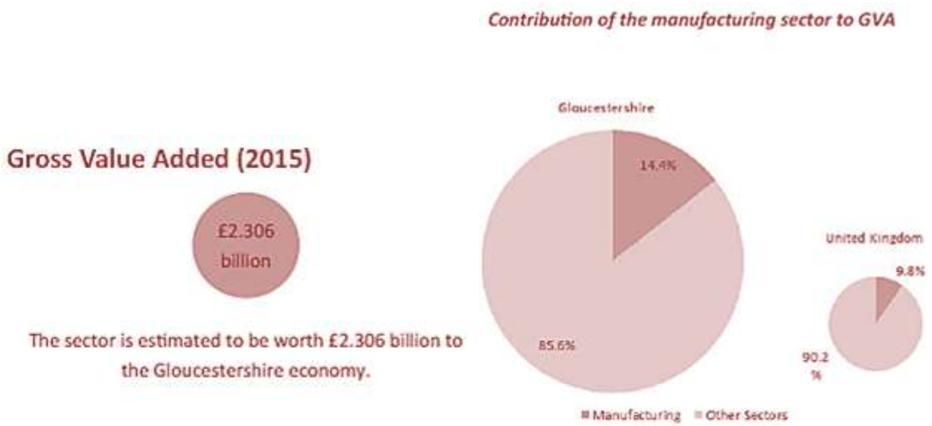
The following skill clusters are most requested



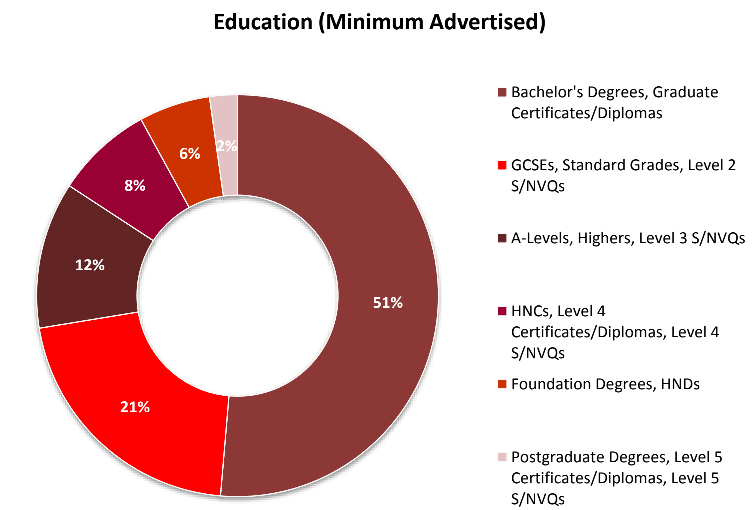
The following levels of education and levels of experience are requested







	Demand and Employment			Salary	
	Burning Glass		ONS Oct 2017-Sep 2018[3]	Burning Glass	ONS, 2017[4]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Welding trades	111	High Risk	63,100	£26,137	£26,319
Metal working machine operatives	94	Medium Risk	66,300	£26,843	£22,957
Metal machining setters and setter-operators	89	Medium Risk	49,500	£28,070	£27,692
Programmers and software development professionals	71	Low Risk	336,200	£36,120	£43,834
Engineering technicians	68	Low Risk	110,900	£25,024	£35,295
Production managers and directors in manufacturing	62	Low Risk	308,700	£32,846	£55,643
Engineering professionals n.e.c.	60	Low Risk	122,500	£24,169	£42,981
Kitchen and catering assistants	50	High Risk	506,900	£26,420	£10,123
Customer service occupations n.e.c.	49	Medium Risk	312,900	£21,364	£17,029
Science, engineering and production technicians n.e.c.	45	Medium Risk	48,700	£21,135	£27,478



Source: Burning Glass Labour Insight

Query conditions

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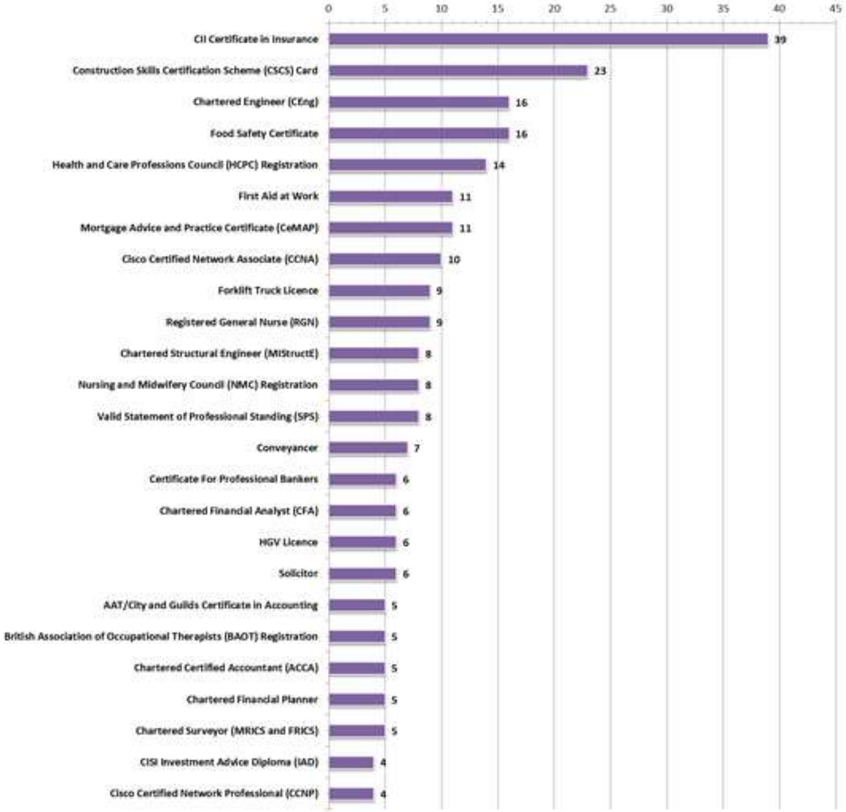
*these SIC codes also feature in the food and drink sector

these SIC codes also feature in the energy sector

+ these SIC codes also feature in the finance and professional services sector

Finance & Professional

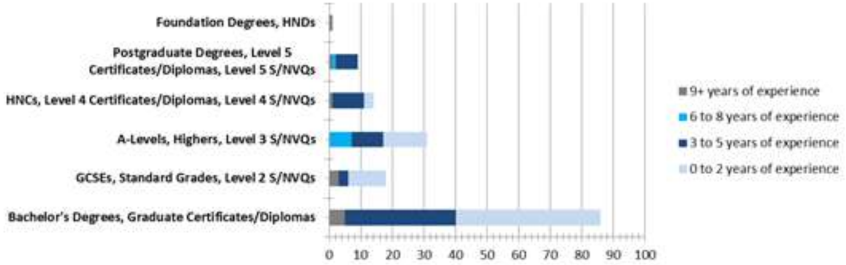
Certifications in Greatest Demand April 18 - March 19

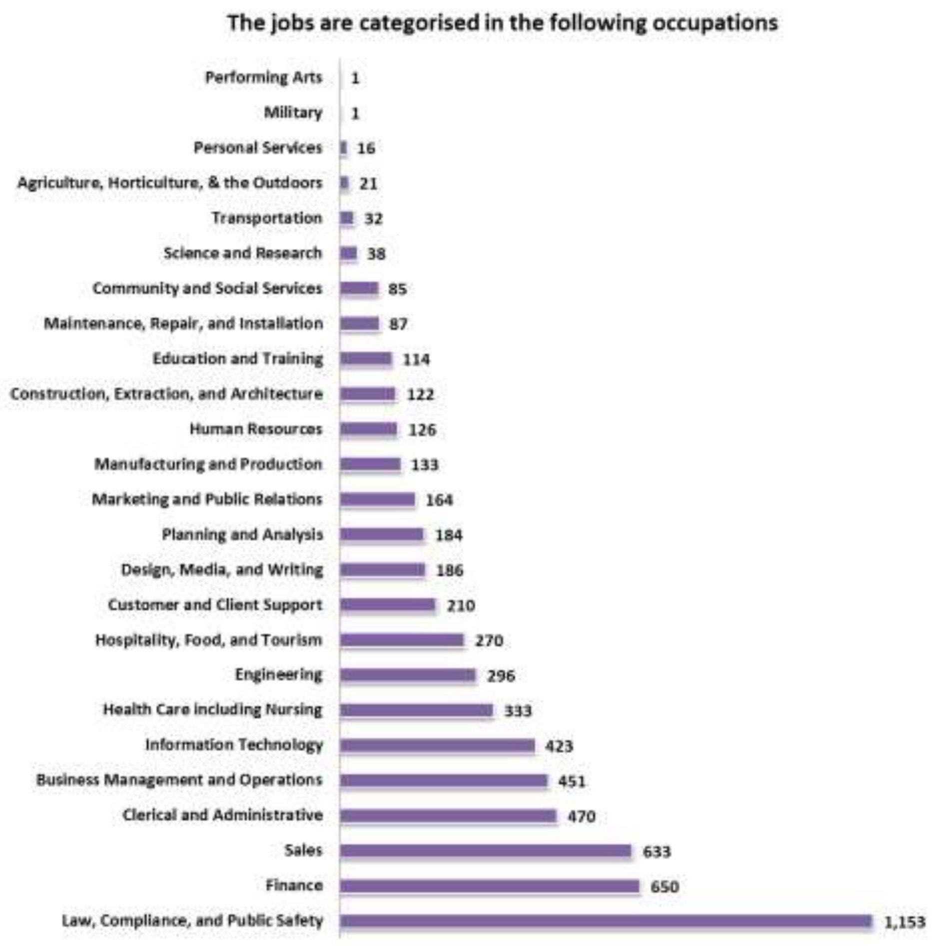


The jobs are categorised into the following industries

The following skill clusters are most requested

The following levels of education and levels of experience are requested





Source: Burning Glass Labour Insight

Query conditions

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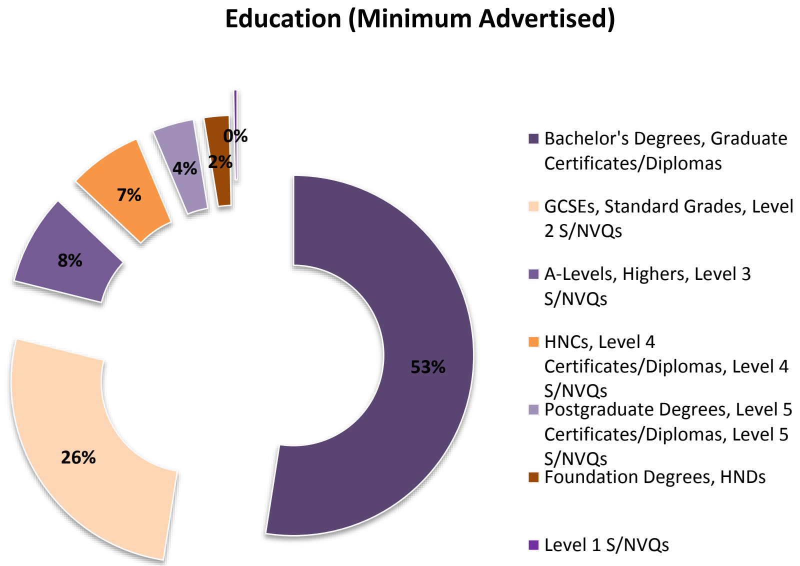
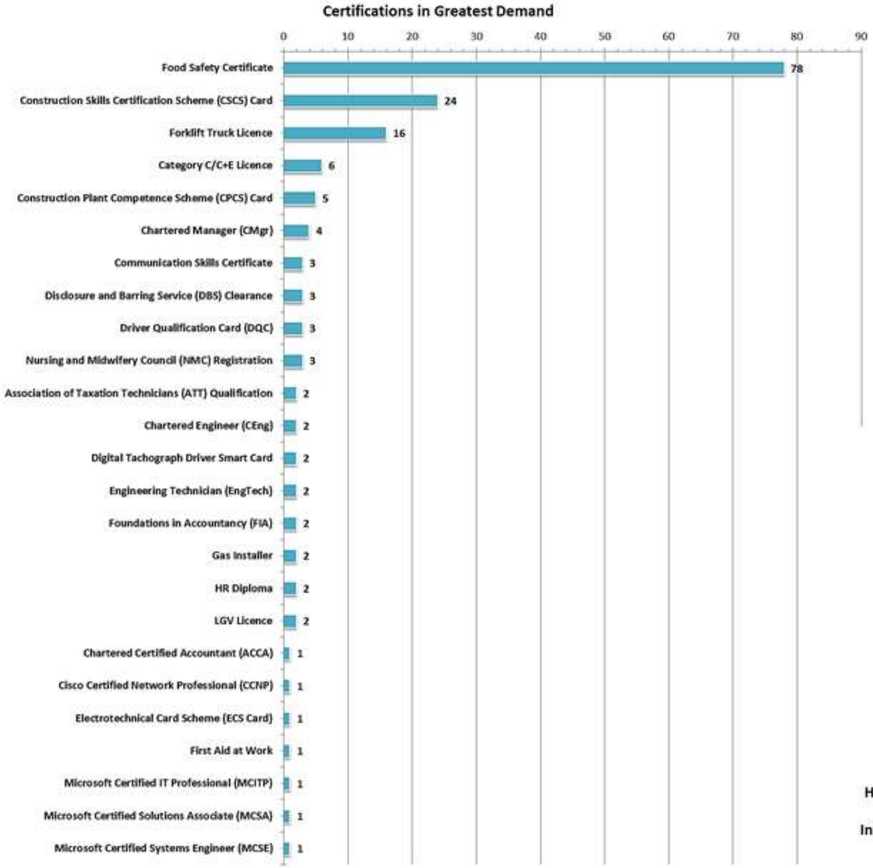
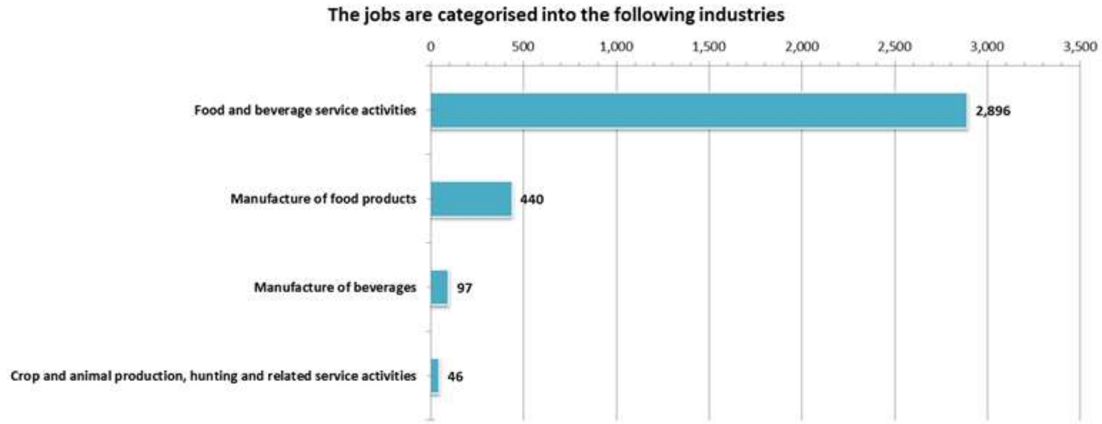
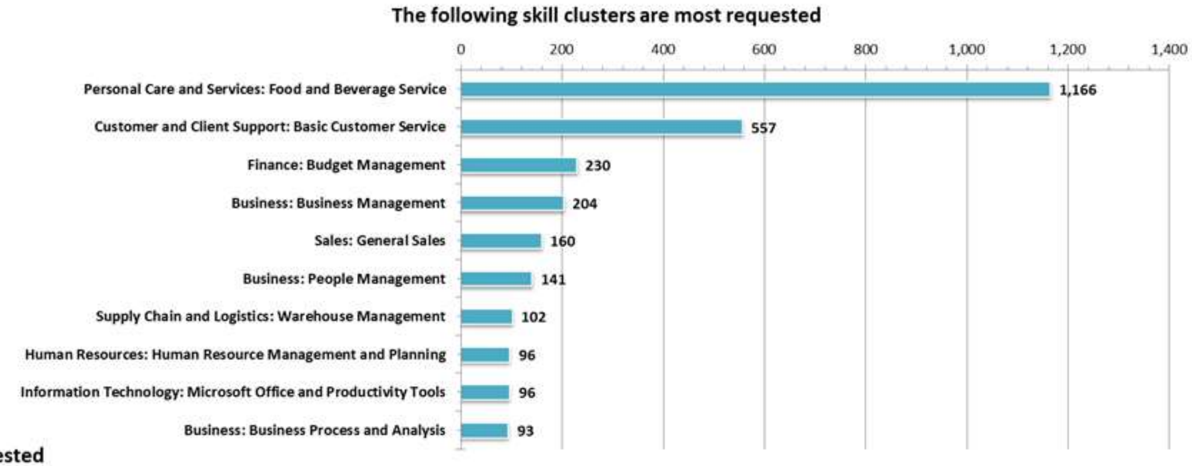
	Demand and Employment			Salary	
	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Solicitors	770	Low Risk	122,100	£51,512	£48,009
Sales related occupations n.e.c.	301	Medium Risk	59,200	£28,831	£20,301
Customer service occupations n.e.c.	203	Medium Risk	312,900	£18,709	£17,029
Legal associate professionals	190	Medium Risk	77,000	£23,923	£30,097
Other administrative occupations n.e.c.	146	High Risk	802,500	£18,811	£17,453
Programmers and software development professionals	143	Low Risk	336,200	£43,377	£43,834
Book-keepers, payroll managers and wages clerks	121	High Risk	423,700	£25,027	£21,640
Finance and investment analysts and advisers	115	Medium Risk	197,800	£36,537	£41,992
Marketing and sales directors	113	Low Risk	230,500	£44,820	£89,317
Managers and proprietors in other services n.e.c.	113	Low Risk	211,200	£34,250	£34,092

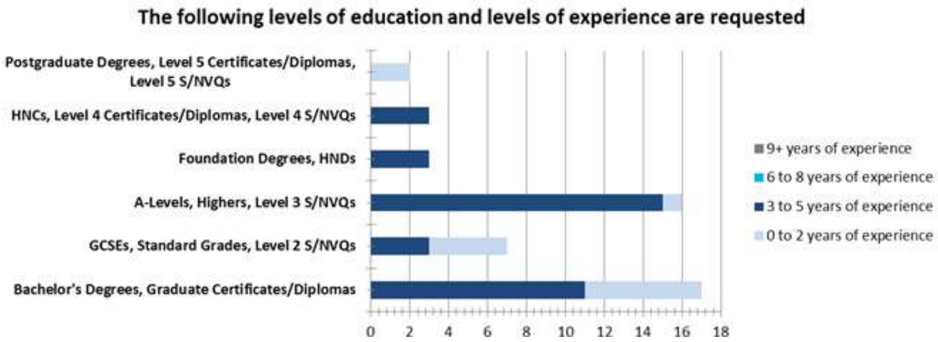


Food and Drink









Source: Burning Glass Labour Insight

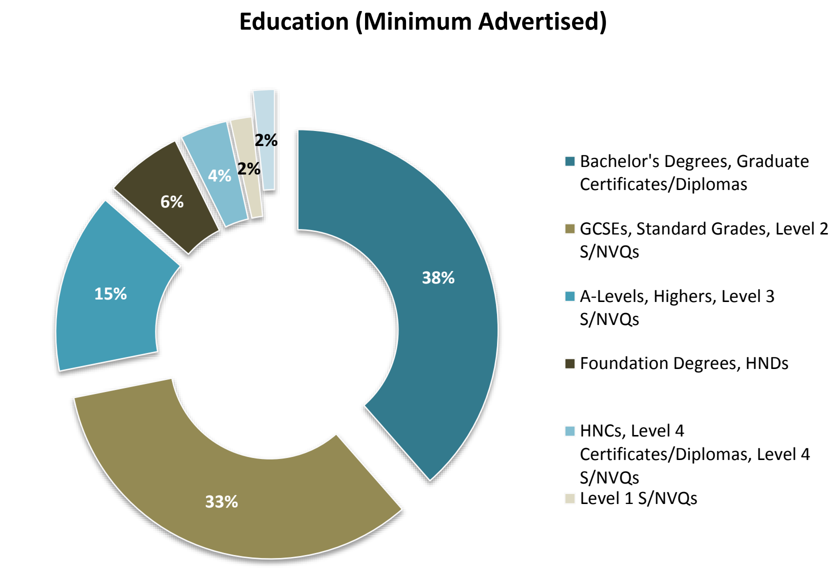
Query conditions

Apr. 1, 2018 - Mar. 31, 2019 AND (LEP : Gloucestershire) AND (SIC Code : 10* OR SIC Code : 01 OR SIC Code : 03 OR SIC Code : 11* OR SIC Code : 56 #)

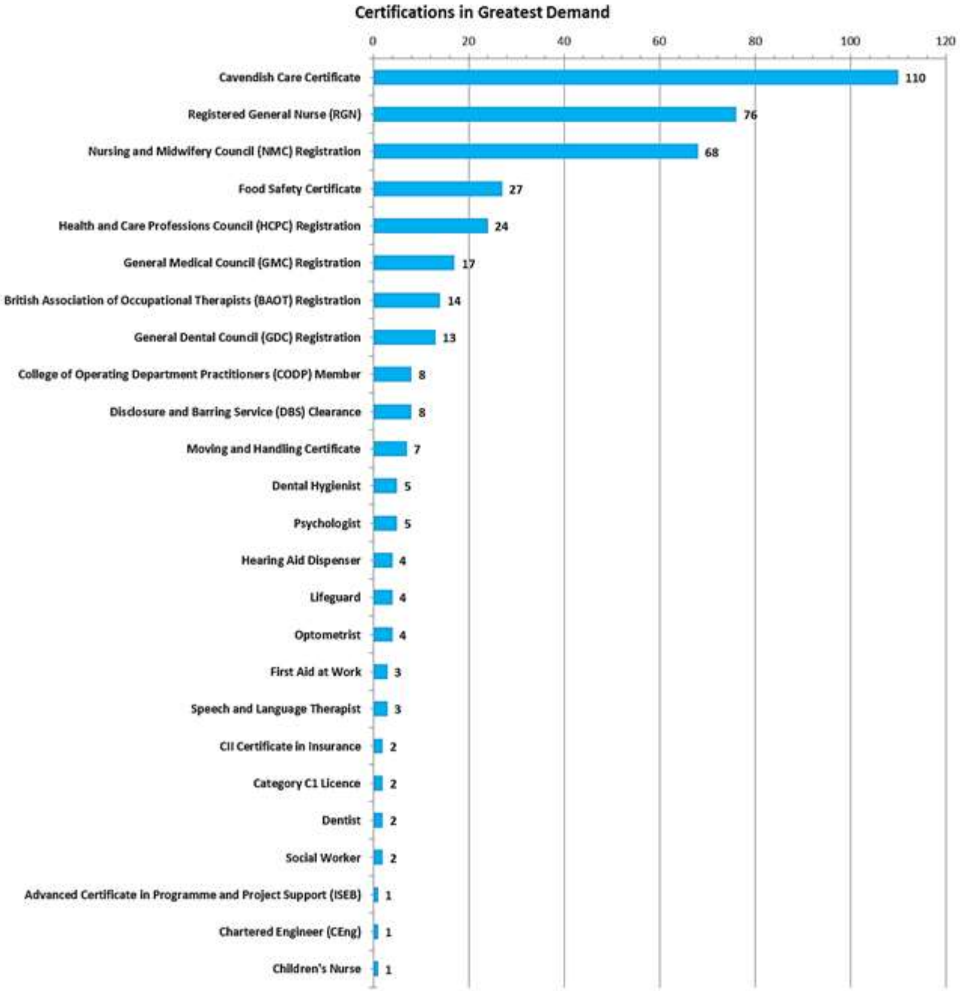
*these SIC codes also feature in the manufacturing sector

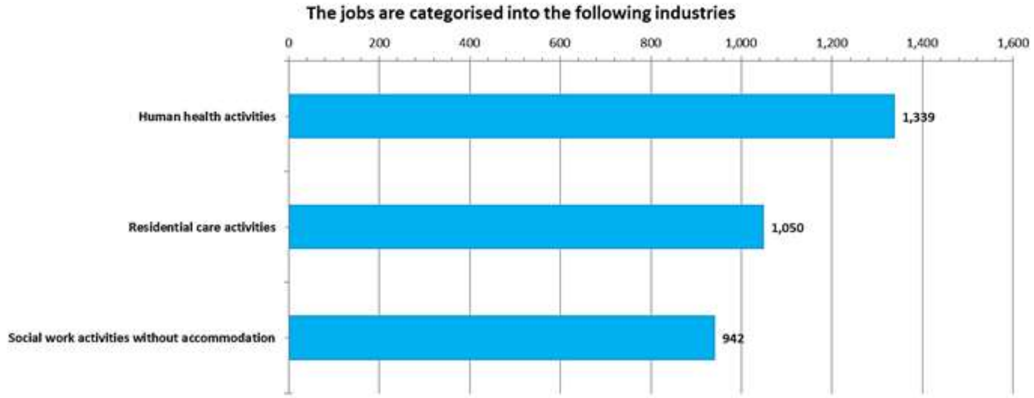
these SIC codes also feature in the leisure and tourism sector

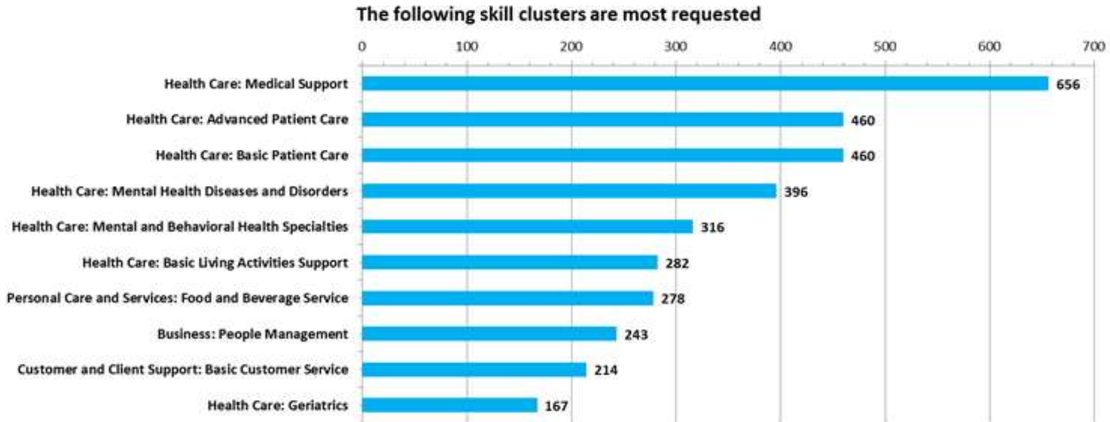
Category:	Demand and Employment			Salary	
Source:	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Chefs	709	Low Risk	242,300	£23,802	£19,254
Kitchen and catering assistants	476	High Risk	506,900	£18,279	£10,123
Waiters and waitresses	209	Medium Risk	269,100	£17,555	£7,965
Catering and bar managers	175	Medium Risk	63,900	£22,803	£20,047
Restaurant and catering establishment managers and proprietors	157	Low Risk	131,400	£26,081	£23,766
Bar staff	146	Medium Risk	195,300	£18,412	£7,655
Managers and proprietors in other services n.e.c.	139	Low Risk	211,200	£33,123	£34,092
Receptionists	84	High Risk	237,200	£18,237	£13,235
Other administrative occupations n.e.c.	81	High Risk	802,500	£21,396	£17,453
Cooks	52	Medium Risk	70,000	£19,209	£11,874

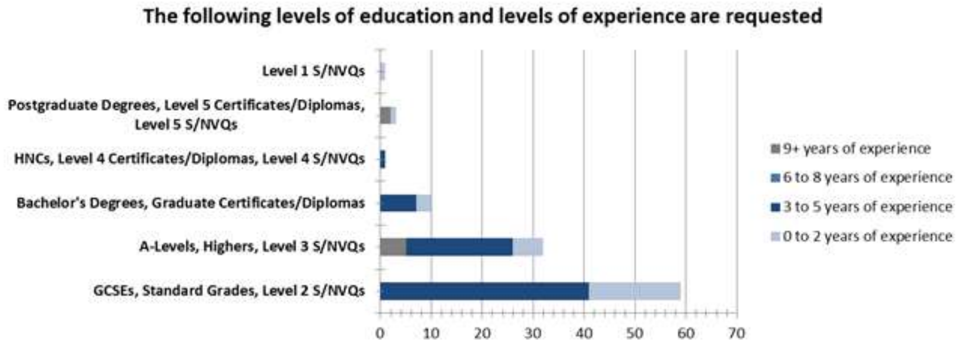


Health & Care Sector









Source: Burning Glass Labour Insight

Query conditions

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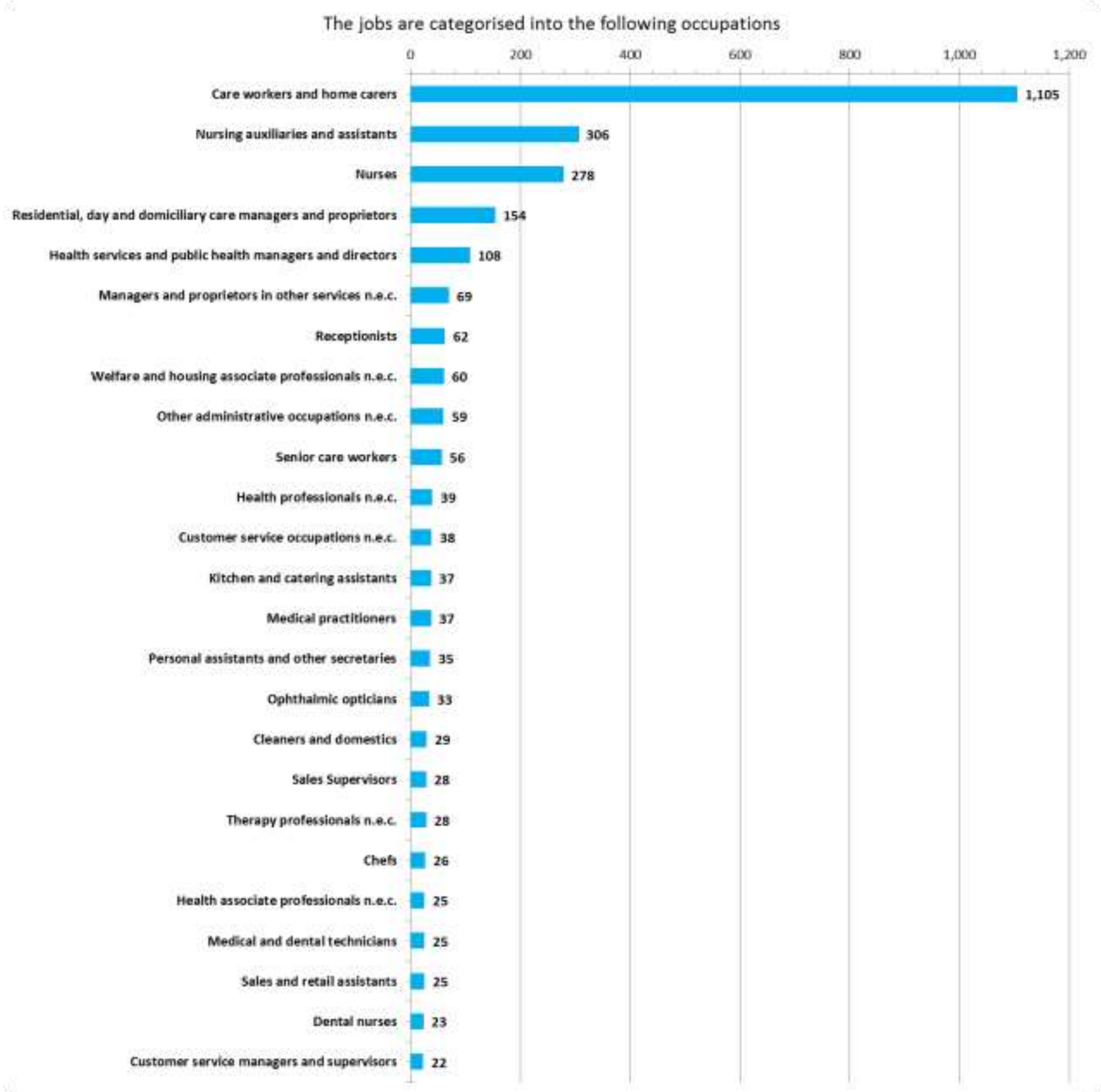
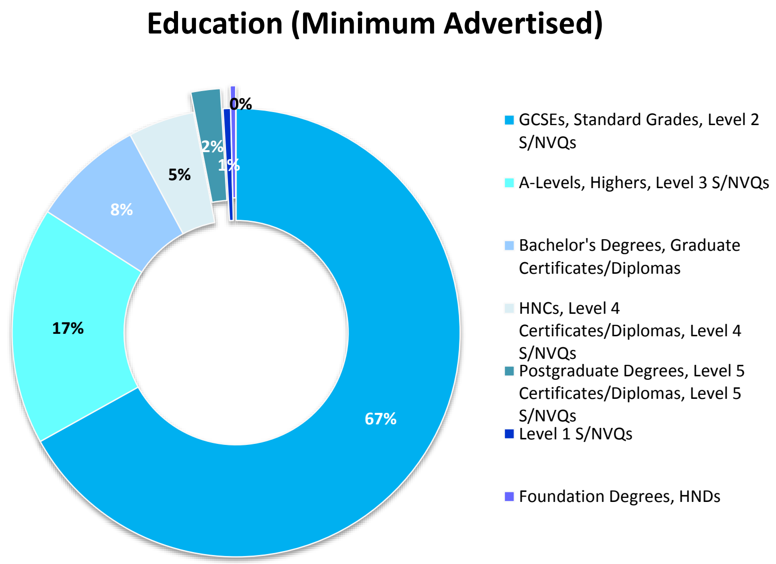
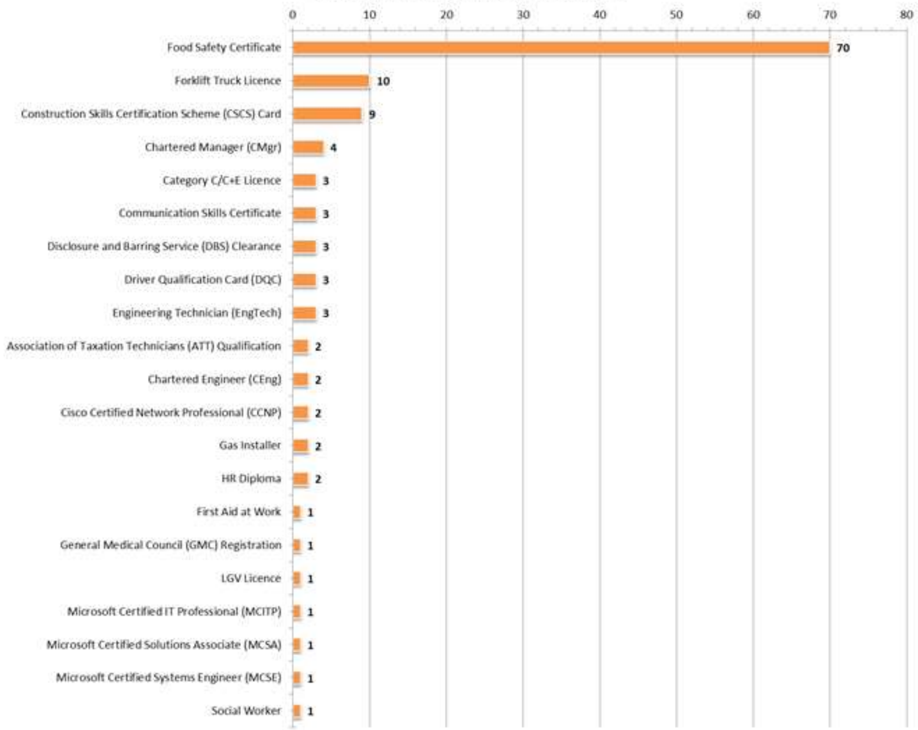


Category:	Demand and Employment			Salary	
Source:	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Care workers and home carers	1,105	Medium Risk	749,300	£19,949	£13,944
Nursing auxiliaries and assistants	306	Low Risk	328,900	£22,099	£16,108
Nurses	278	Low Risk	628,700	£37,913	£26,793
Residential, day and domiciliary care managers and proprietors	154	Medium Risk	52,200	£43,351	£31,498
Health services and public health managers and directors	108	Low Risk	70,300	£39,108	£46,921
Managers and proprietors in other services n.e.c.	69	Low Risk	211,200	£32,734	£34,092
Receptionists	62	High Risk	237,200	£18,569	£13,235
Welfare and housing associate professionals n.e.c.	60	Low Risk	136,700	£19,299	£19,405
Other administrative occupations n.e.c.	59	High Risk	802,500	£19,498	£17,453
Senior care workers	56	Low Risk	83,800	£21,048	£17,390

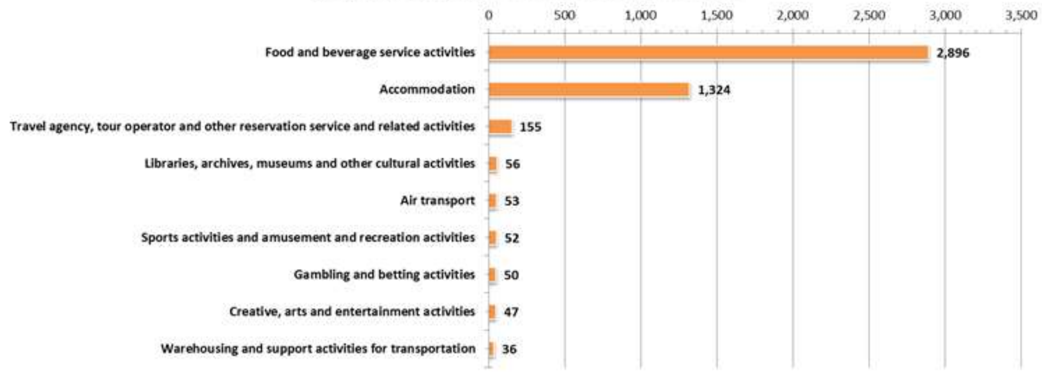


Leisure and Tourism

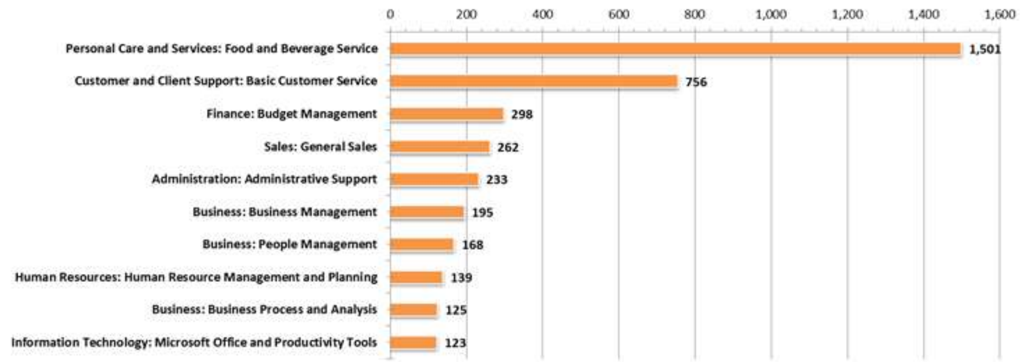
Certifications in Greatest Demand



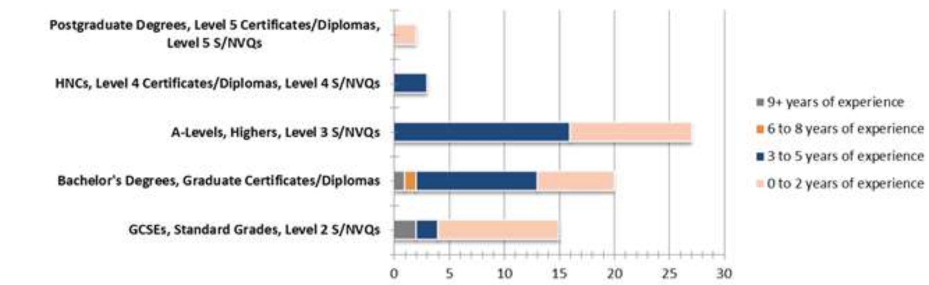
The jobs are categorised into the following industries



The following skill clusters are most requested



The following levels of education and levels of experience are requested



Source: Burning Glass Labour Insight

Query conditions

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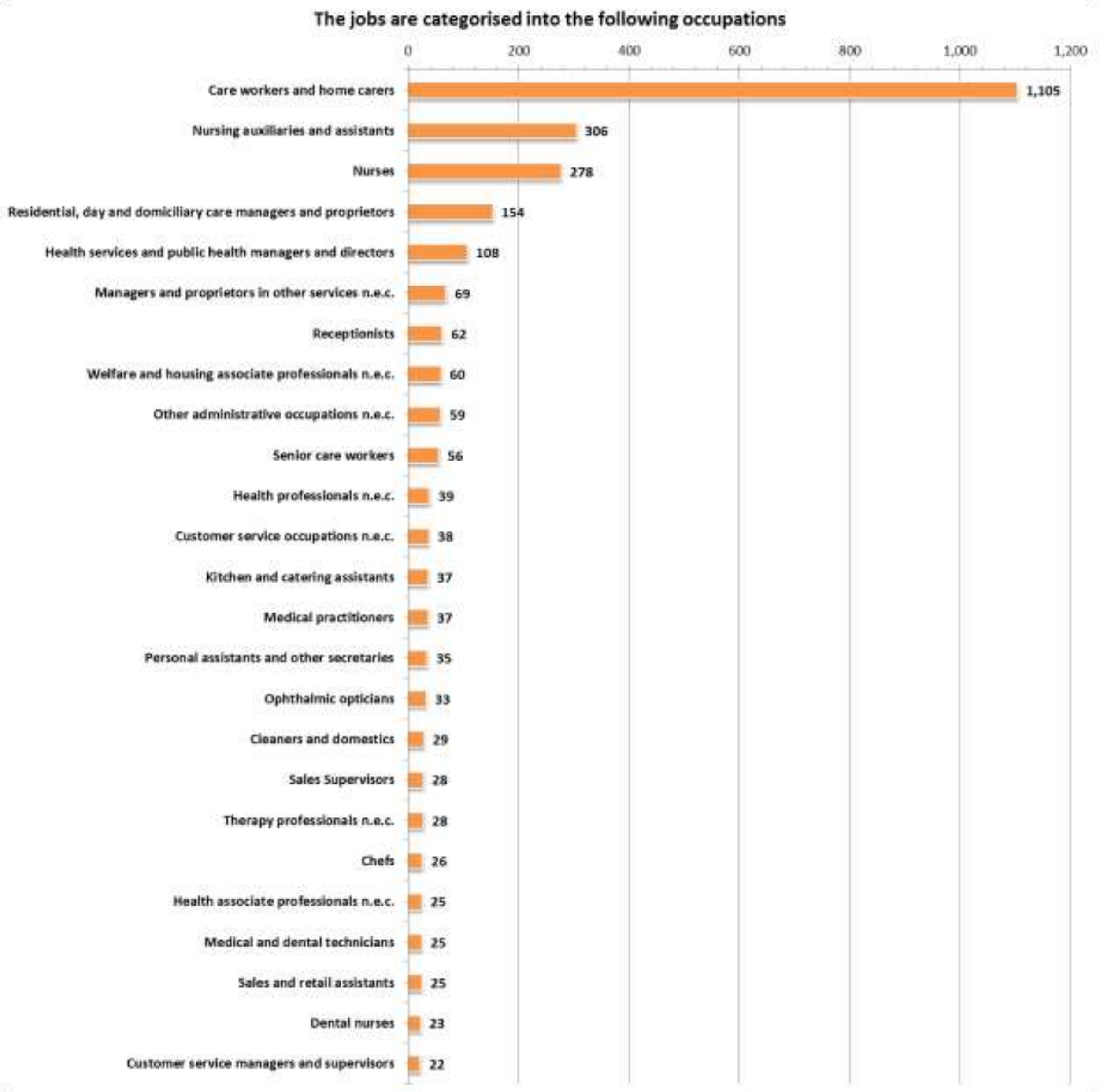
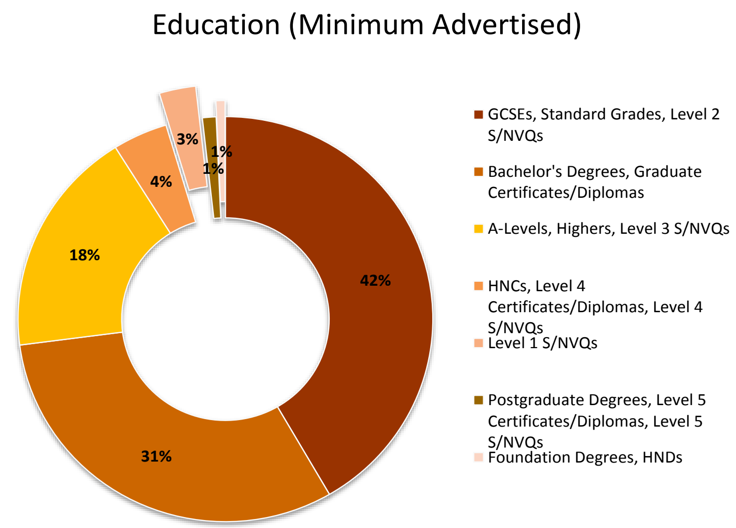
*these SIC codes also feature in the food and drink sector

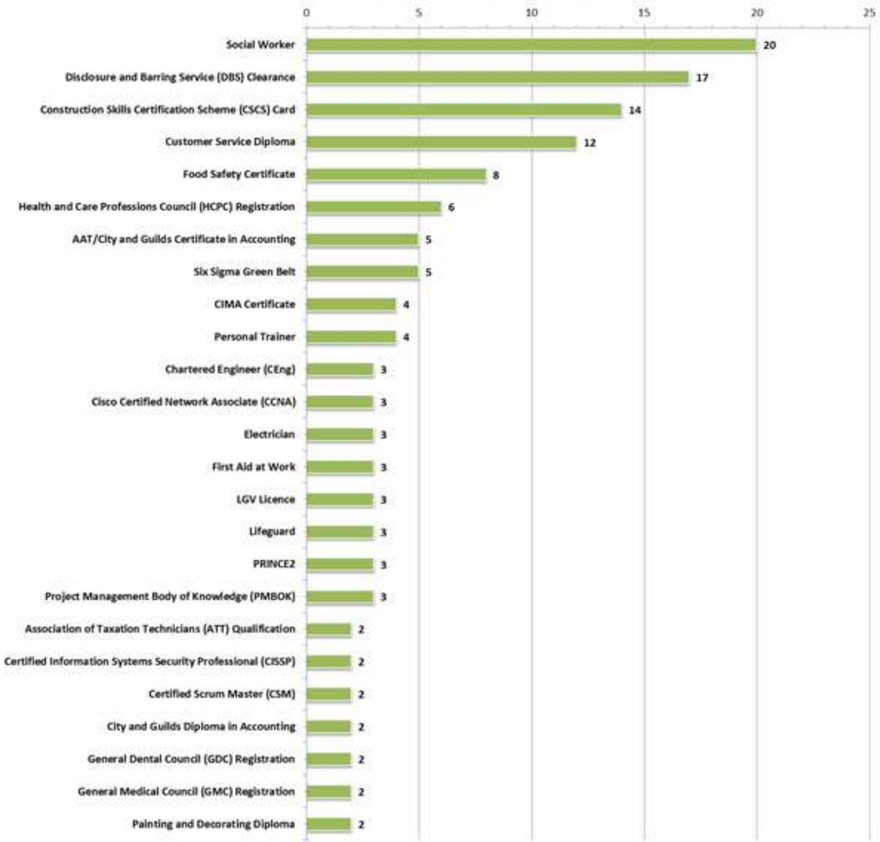


Category:	Demand and Employment			Salary	
Source:	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Chefs	1,064	Low Risk	242,300	£23,407	£19,254
Kitchen and catering assistants	576	High Risk	506,900	£18,081	£10,123
Receptionists	260	High Risk	237,200	£19,771	£13,235
Waiters and waitresses	224	Medium Risk	269,100	£17,707	£7,965
Catering and bar managers	198	Medium Risk	63,900	£22,915	£20,047
Managers and proprietors in other services n.e.c.	192	Low Risk	211,200	£30,017	£34,092
Bar staff	170	Medium Risk	195,300	£18,738	£7,655
Restaurant and catering establishment managers and proprietors	164	Low Risk	131,400	£26,321	£23,766
Other elementary services occupations n.e.c.	109	Medium Risk	33,800	£17,493	£8,618
Other administrative occupations n.e.c.	93	High Risk	802,500	£20,980	£17,453

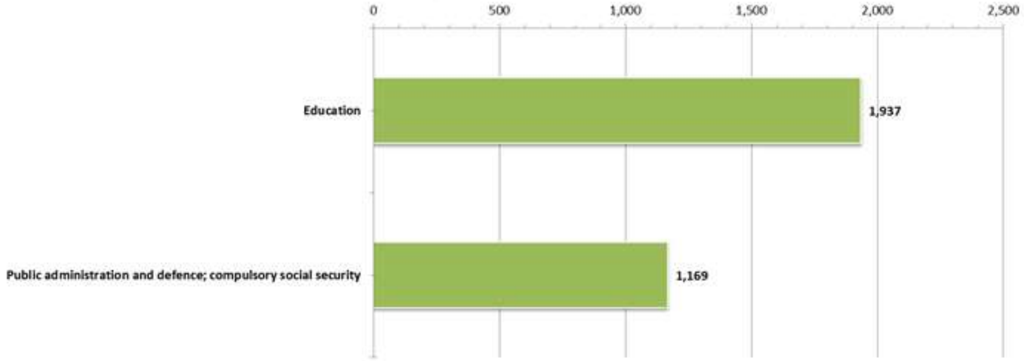


Public Sector

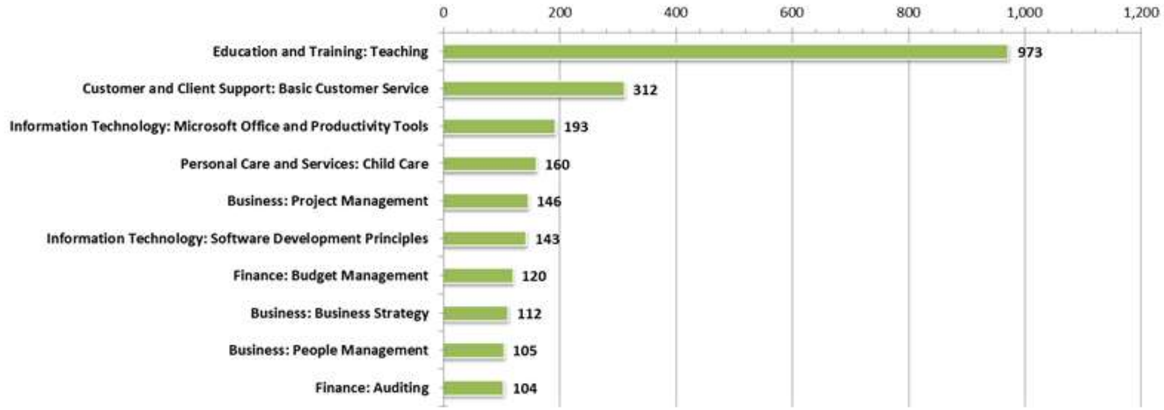
Certifications in Greatest Demand



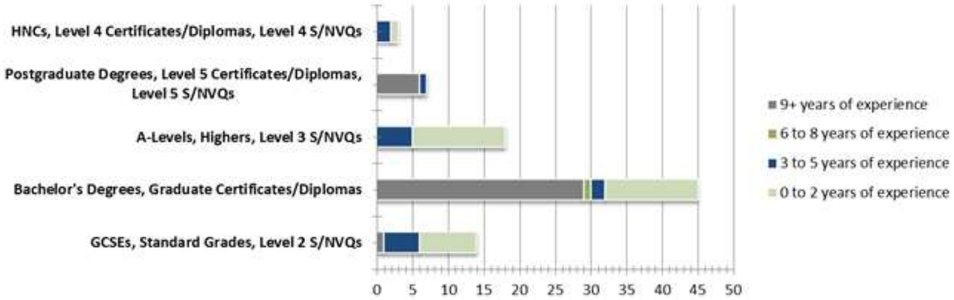
The jobs are categorised into the following industries



The following skill clusters are most requested



The following levels of education and levels of experience are requested



Source: Burning Glass Labour Insight

Query conditions

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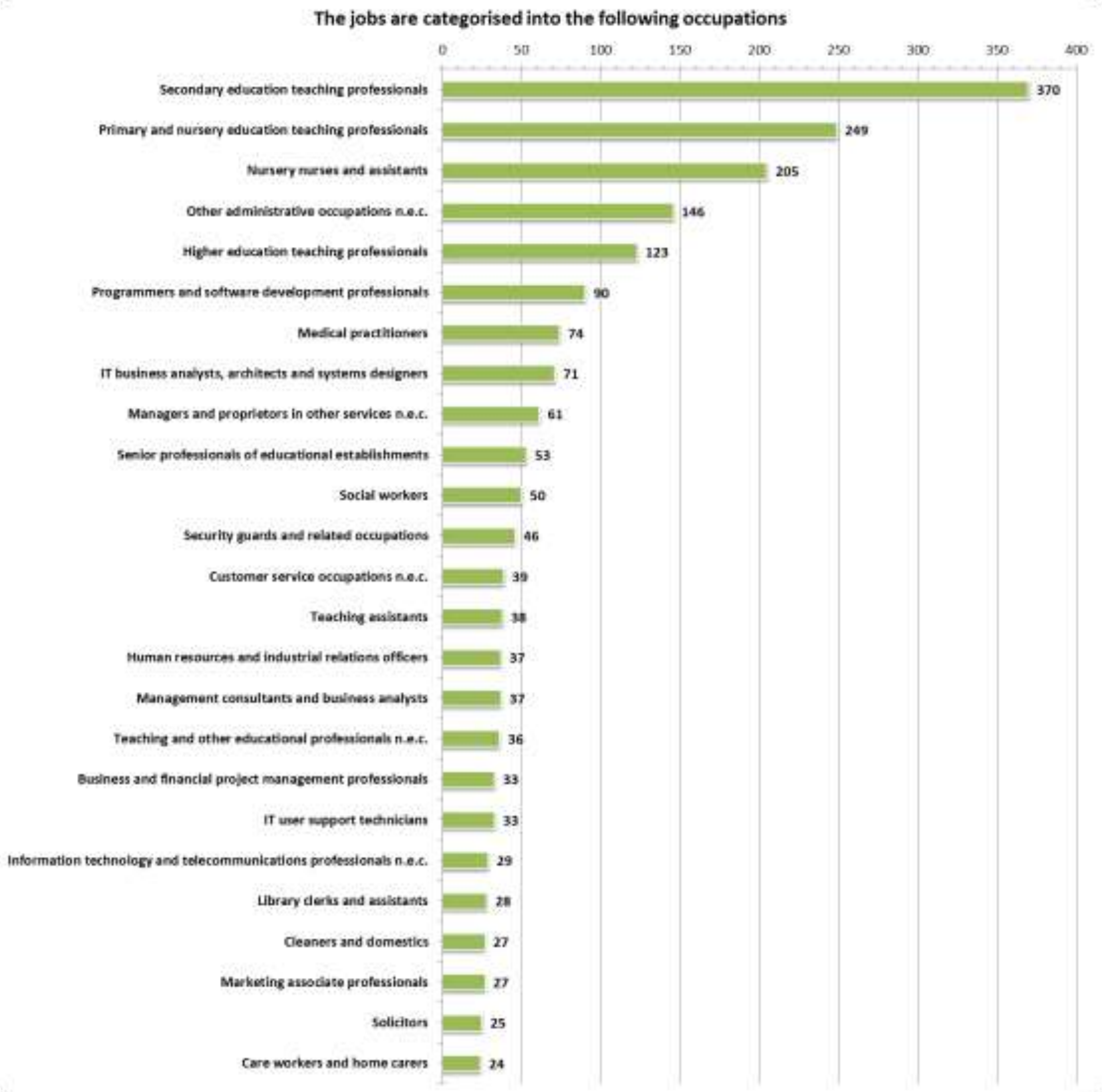
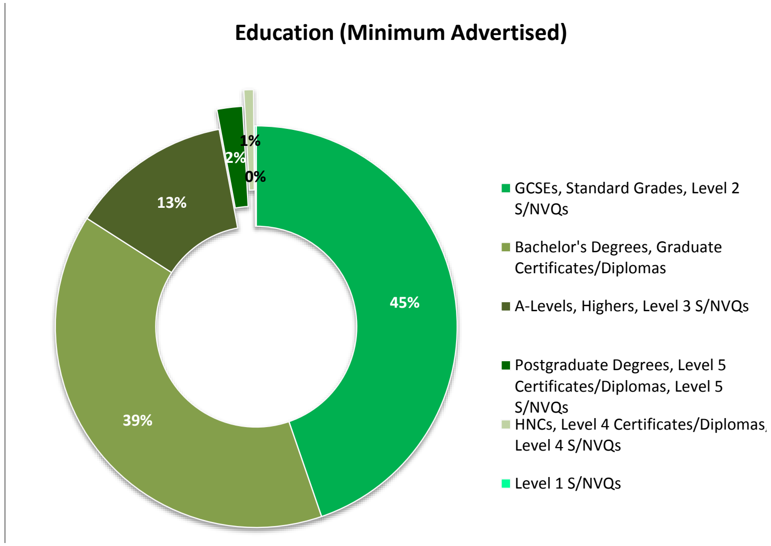


Category:	Demand and Employment			Salary	
Source:	Burning Glass		ONS Oct 2017-Sep 2018[1]	Burning Glass	ONS, 2017[2]
Occupation Title	Number of Job Postings	Risk of Automation	Number in employment (UK-wide)	Mean Advertised Salary	Mean Salary (UK-wide)
Secondary education teaching professionals	370	Low Risk	388,500	£32,735	£34,372
Primary and nursery education teaching professionals	249	Low Risk	436,800	£28,809	£29,672
Nursery nurses and assistants	205	Low Risk	214,400	£18,787	£12,853
Other administrative occupations n.e.c.	146	High Risk	802,500	£18,913	£17,453
Higher education teaching professionals	123	Low Risk	168,900	£34,749	£45,275
Programmers and software development professionals	90	Low Risk	336,200	£37,908	£43,834
Medical practitioners	74	Low Risk	262,600	N/A	£71,204
IT business analysts, architects and systems designers	71	Low Risk	132,100	£34,641	£49,421
Managers and proprietors in other services n.e.c.	61	Low Risk	211,200	£33,196	£34,092
Senior professionals of educational establishments	53	Low Risk	106,700	£32,946	£52,342



Sectors to Watch

Cyber, Artificial Intelligence and Robotics

At present, 15.4% of young people surveyed have plans to enter the cyber-tech sector showing a good level of interest, with room to grow. 20.4% want to enter the creative industries, which is increasingly likely to incorporate advanced digital skills.[54] Gloucestershire's Higher and Further Education institutions are increasingly seeking to align the courses they offer with the many local opportunities in cyber-tech.

Digital and cyber-tech courses are now available across the county at:

- University of Gloucestershire through its School of Business and Technology and C11 Cyber Training facility at Berkeley Science and Technology Park which undertakes research and knowledge exchange activities that support innovation; delivers innovative solutions, courses, training materials in areas related to cyber-tech and digital, business growth and innovation.
- Gloucestershire College which in partnership with the University of the West of England, will offer cyber-tech degrees from September 2019.
- South Gloucestershire and Stroud College;
- Adult Education in Gloucestershire;
- Gloucestershire County Council Library Service; and
- Local independent training providers.

Initiative Schemes:

Cyber Valley

Cyber Valley, formed by GFirst LEP with neighbouring LEPs in Swindon and Wiltshire, Worcestershire, and The Marches, has the following ambitious objectives:

- double the size of the cyber-tech and digital sector in the region;
- position the region as the UK's largest cluster of cyber-tech and digital activity outside London; and
- promote an entrepreneurial start-up culture, attract new investment, develop talent and embed cyber-tech resilience in firms across all industries.

Cyber Valley has identified that 'there is a strong concentration of skills in cyber security within the region, which can be used to embed cyber-tech resilience through a wider industrial base, including making a strong contribution to the growth of the UK's cyber security sector directly, and supporting industries within which their demand for secure solutions grow the region's economy'.[55] This has resulted in a 185% growth in the number of registered active cyber security firms across the geography in the ten years leading up to 2017.[56] The ambition of Cyber Valley extends to promoting an entrepreneurial start-up culture and attracting new investment, which is further supported at a local level with a greater focus on ensuring the infrastructure is fit for purpose and on developing the skills and talent pipeline.

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[54] GFirst LEP Magnet County Youth Survey
[55] Cyber Resilience Alliance (now Cyber Valley) – Science and Innovation Audit
[56] Source: University of Gloucestershire

CyNam

Cyber Cheltenham (CyNam) is a locally-based community interest company whose network acts as a focal point in bringing together ideas and collaboration in the cyber-tech and digital sector. CyNam is the UK's best attended regular cluster event and boosts a 1000+ person strong community from over 100 local businesses.

CyNam brings together cyber-tech SMEs, enterprise technology companies, academia, local and central government departments as well as the investment community and wider supporting industries to fulfil a vision of enabling Cheltenham and Gloucestershire to reach its potential as a globally recognised hub of cyber-tech innovation. CyNam recently partnered with Hub8 to create a 7000sq/ft physical incubation and innovation workspace in central Cheltenham, the first purpose-built facility for private cyber tech innovation in the South West.

An additional ambition of CyNam is to demystify cyber security for those who are outside of the sector, educating and enabling the general public and wider businesses to protect their data more effectively. This includes students and children, to also inspire the cyber-tech generation of tomorrow. CyNam has so far drawn on limited private funding through industry sponsors and is run by a Board of Directors featuring Directors of various local cyber-tech companies.

Cyber Central

The planned UK cyber-tech park development located adjacent to GCHQ in Cheltenham will encourage new and existing businesses to develop within the Cheltenham cyber-tech cluster. Cyber Central must be closely linked to GCHQ, connected with data and people, as well as being suitably linked with the county's main centres of Cheltenham and Gloucester. Infrastructure is key, with a need to fully address challenges of congestion on the A40, Cheltenham Spa railway station and the limited entry and exit at junction 10 of the M5 motorway.

GFirst LEP has committed £22m towards infrastructure improvements in the vicinity of Cyber Central to unlock the first phases of development at the site.
Cyber Central is expected to host the National Cyber Security Centre's (NCSC's) National Cyber Innovation Centre, a dedicated facility to harness government, academic and private sector expertise to develop UK cyber-tech capability and businesses.
The park will also host:

- a research and education facility for development of cutting-edge research in cyber-tech;
- zoned space that can cater for different industry requirements;
- a dedicated hub to house local cyber-tech start-ups originating in part from the NCSC and its innovation centre;
- larger corporate businesses; and
- a skills and visitor centre.

This will require a broad-based collaboration across local, national and international academia, including world-leading accredited research universities. The emerging masterplan for Cyber Central also sets out the need for a residential offering relevant to the local workforce including:

- hotel and conference facilities – which will be important to establish Cyber Central as an internationally significant venue for the sector;
- housing and leisure facilities – which will draw talent, particularly young talent, to the park; and
- ensuring that the local community of West Cheltenham, including some of the most deprived parts of the county, can use the facilities and interact with the Cyber Central community, helping to raise local aspirations about careers in cyber-tech.

Agri-Tech

Agriculture has long been part of the Gloucestershire landscape.

- Over 70% of the county is agricultural land.[57]
- Gloucestershire has a food and agriculture sector valued at nearly £1.5bn
- The sector supports 50,000+ jobs in the county, and has double the national proportion of activity.[58]

Gloucestershire has two institutions (Royal Agriculture University – Farm 491 and Hartpury) that lead the way in developed technology for agriculture. Combined with the opportunities technology brings and can be developed in the county means that this could be a niche area. Agriculture has a looming demographic crisis. National the proportion of workers under 35 years of age was just 3%. Associated with this development of food and drink in the county and the natural landscape that much of the tourism industry relies on.

Farm 491 - awarded £2.92m through Local Growth Fund (LGF) has enabled the Royal Agricultural University (RAU) to establish the Farm 491 Agri-Tech centre, based over 2 sites. This delivers space for innovators to establish and grow enterprises that develop and apply technology to agriculture. These entrepreneurs have access to a support network of farmers, businesses, investors, and academics, as well as open access to data, research, equipment, and resources[59].

Hartpury University – Tech to Plate - This project, awarded £1m in 2018, will complement the Farm 491 Agri-Tech Innovation Centre by delivering a technology application and training centre for Gloucestershire and the wider region. The centre will support the wider adoption of digital technology to deliver productivity improvements in agri-businesses and the traceability of farm produce, particularly livestock.

A short survey to indicate the significance was carried out in May 2019 with companies contracted to the Hartpury – Gfirst LEP Tech to Plate project. They confirmed the strategic evidence that demand is increasing for digital skills in the Agricultural sector. Key areas will impact the future of Further and Higher education will fall into multiple sectors but cross cutting themes emerge that require rapid enhancement of skills at all levels. Artificial Intelligence, Machine Learning and the data-driven economy are all highly applicable to agriculture. Building on existing Cyber Security and Agricultural technology investments, there is logic in future development and driving Innovation in these two rapidly advancing sectors.

Also the presence in the county of a nationally significant research institution such as Campden BRI provides Gloucestershire's fledgling agri-tech businesses with a unique opportunity to revolutionise farming techniques and processes, building on the distinctly rural character of the county. Campden BRI is a world leader in the agri-tech sector supporting companies with practical scientific, technical and advisory services and actively looking at opportunities for collaboration with agri-tech businesses and academic institutions within Gloucestershire.

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[57] Source: National Farmers Union South West
[58] The Scale and Impact of the Farming, Food, Drink & Rural Economy in Gloucestershire, Collison et al, March 2019
[59] https://www.gfirstlep.com/projects/farm-491/

One of the aims of the local industrial strategy is the creation of an advanced agri-tech hive[60], a virtual innovation cluster that builds on previous GFirst LEP investment in agri-tech and cyber security to develop a hive that attracts global investment by:

- coordinating business development;
- delivering foundation projects to incubate solutions for international consumption;
- utilising this knowledge, research and trial hub, develop the protocols, systems and evidence for new models of 'net zero' farming;
- developing transferable networks for peer-to-peer data sharing, innovation and knowledge exchange that enables productivity and resource efficiency on farms;
- creating partnerships between Further Education (FE), Higher Education (HE), and commercial training providers to develop technical and business skills;
- accelerating the development of dynamic procurement platforms with traceability, sustainability, origin and ingredient credentials;
- working with other nationally and internationally recognised FE and HE institutions to close the digital and technical skills gap in food and farming, attracting and developing talent in Gloucestershire.
- exploiting improvements in connectivity, transport and storage solutions to enhance the opportunities of this investment to benefit local farms, food businesses and communities;
- engaging with Local Authorities, Local Nature Partnership and community initiatives, to ensure that our plans complement other relevant initiatives, such as Gloucestershire's emerging Health and Wellbeing Strategy.[61]

[60] This is a working title, Draft Local industrial strategy.
[61] Gloucestershire Health and Wellbeing Strategy – Gloucestershire County Council

STEM

Many jobs of the future will require STEM (Science, Technology, Engineering and Mathematics) subjects. Industries related to STEM subjects are important to Gloucestershire. The recent Science and Innovation Audit (SIA)[62] (including Gloucestershire) found that just over a third (36%) of subjects being studied by undergraduates in Gloucestershire are STEM. This figure has increased by 1.8% since 2012. This is better than the consortia area[63] (average 1.1% increase) but matches the overall picture for England and Wales – increase of 1.8%.

For post graduate students 46% of subjects are in STEM subjects. Biological science and Architecture, building and planning being the most popular subjects. The report shows that out of the consortium Gloucestershire is losing graduate skills the most. 60.7% remain in the LEP area 6 months after graduating which may sound high but not compared to Cornwall and Isles of Scilly at 74.9%. The reasons for this should be examined further. Out of 40 LEP regions Gloucestershire ranks 32nd for retaining graduates 6 months after graduation. This is significant in Gloucestershire and should be addressed. The report found that 6.6% of Gloucestershire's workforce is employed in science, research, engineering and technology professionals and associated professions. Ranking =21st out of 40 LEPs.

A positive statistic is Gloucestershire (14.5%) is above the GB average (11.9%) for the share of employees employed in all SIA 5[64] themes (14.5% equates to 40,200 employees).

The county appears to have a particular strength in next generation microelectronics (LQ[65] 5.48) and for this area is ranked 3rd in Great Britain. However, there are only 80 businesses classed as microelectronics; only 0.3% of the share of enterprises in the 5 themes. The largest share of enterprises in 2015 was the 'resilience, environment and sustainability theme' at 13.3% but it had the lowest location quotient of all 5 themes of 0.93. It also had the greatest number of businesses in 2015 (3650).

Gfirst LEP[66] have invested £2.1m in STEM centres across the county supporting new or improved engineering, physical sciences, and digital technology centres:

Cirencester College - The 1,582–square metre STEM centre was jointly funded by GFirst LEP and the Education Funding Agency. This has enabled the college to meet the needs of local employers that want to recruit people with STEM qualifications, as well as the rising demand from young people who want to study these subjects. The centre includes state-of-the-art teaching labs to support the expanded bio-medical health provision and high-spec computers to support 3D modelling and data handling.

Gloucestershire College (Cheltenham, Gloucester and Forest of Dean) - The project created two new construction centres, one in Cheltenham and the other in the Forest of Dean. In addition, the engineering facilities and self-directed study areas at the Gloucester campus were enhanced to improve facilities and attract more students into STEM subjects.

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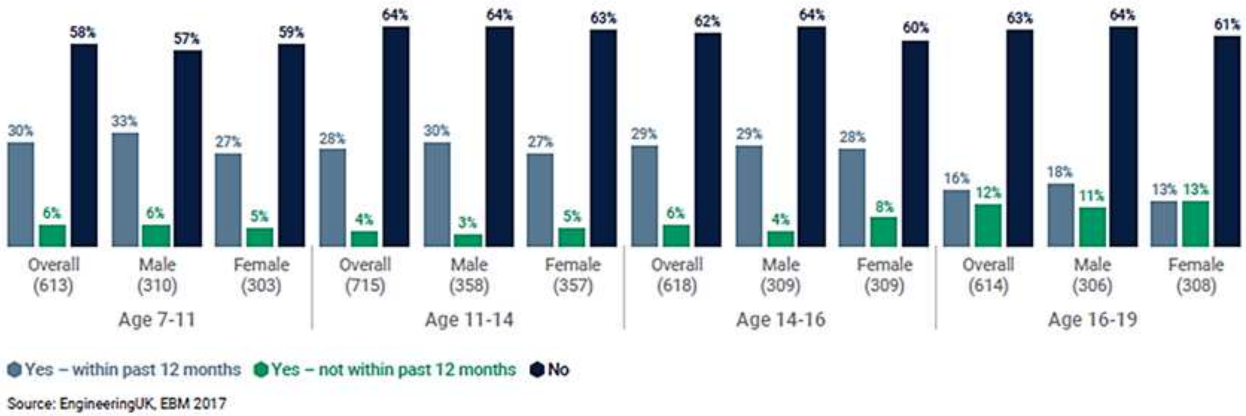
[62] http://gw4.ac.uk/sww-sia/
[63] The consortia area is South West of England (Cornwall & Isles of Scilly, Gloucestershire, Heart of the South West, Swindon & Wiltshire, and West of England LEPs) and South East Wales
[64] The 5 themes are: Aerospace and advanced engineering, Digital living innovation, Resilience, environment and sustainability, Next generation microelectronics and New energy systems
[65] A LQ or Location Quotient is a way that measures a county's industrial specialization relative to a larger geographic unit (usually the nation). For example, an LQ of 1.0 in mining means that the county and the nation are equally specialized in mining; while an LQ of 1.8 means that the county has a higher concentration in mining than the nation. If the LQ is 0.8 then the county has a lower than national average concentration in mining.
[66] https://www.gfirstlep.com/projects/stem-centres/

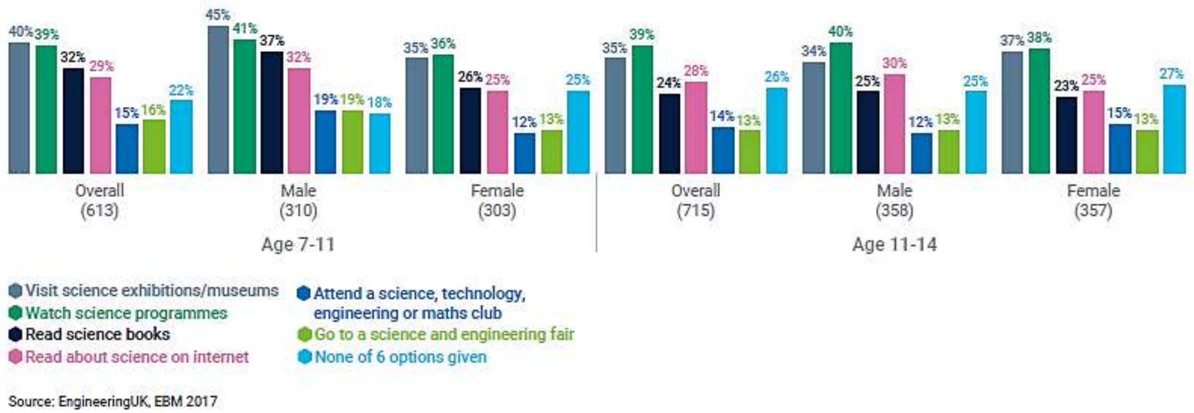
Hartpury College - Hartpury have had a £700,000 investment for the upgrade of animal/veterinary science labs and the creation of 200 new workspaces in order to support and enhance ongoing provision of STEM-designated courses at the college. The project also facilitated the consolidation of student services into a single location on-site.

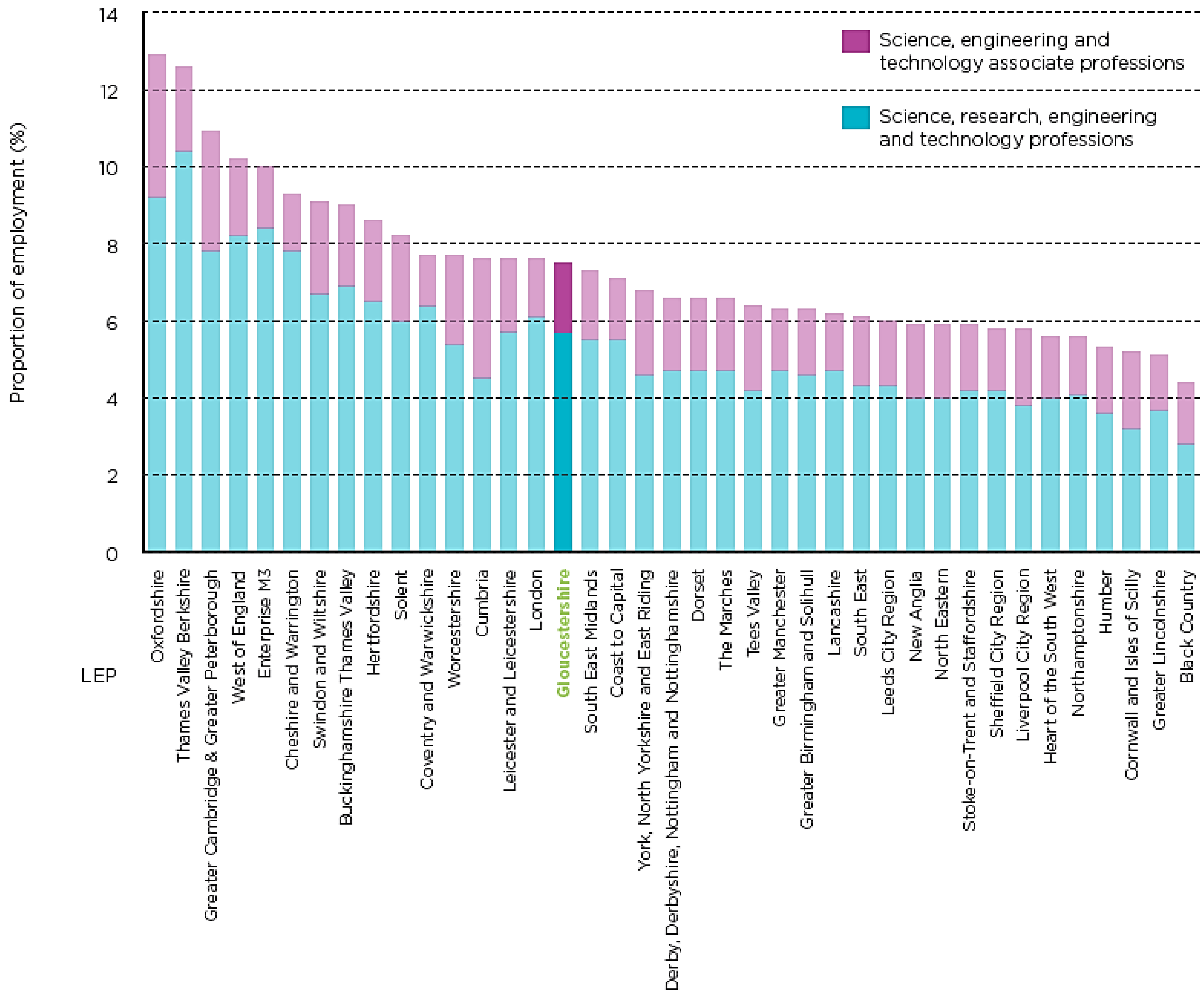
National research has shown that STEM skills shortages are particularly prevalent in certain occupation groups (e.g. Professional occupations) and can create pockets of HTF vacancies; for example, the 2015 ESS found that 43 per cent of vacancies for Professional occupations in so-called SRET sectors (Science, Research, Engineering, and Technology).

Young people between age 11 and 19 who recall taking part in a STEM Carers Activity (2017 – UK)



Participation in Science-related activities outside school by pupils aged 7 to 14 (2017 – UK)





Percentage of all employment in STEM occupations, 2014

Health & Social Care:

Adult Social Care Workforce[67]:

- The sector has a 7.8% vacancy rate
- Lowest number of Zero-hours contracts in South West
- 80% of the workforce is female
- Average age is 42, higher for regulated professionals at 48
- 64% of people starting new roles are recruited from within the sector (high churn within the sector) so the sector does retain experience and skills.
- Estimated 17,500 jobs in Gloucestershire - split across – local authorities (6%); independent sector (88%) and direct payment recipients (5%).

There are some clear issues in the Health & Social Care Labour Market, these are not just limited to Gloucestershire but countywide, these include:

•Vacancies (long term and turnover); hard to recruit to posts and national shortages.

•Supply of newly qualified staff is more difficult to predict now that Health Education England (HEE) no longer commission non-medical undergraduate programmes. The loss of NHS bursaries has had a significant impact on application levels and whilst applications are still in excess of places available, it has had a more significant effect on those professions which have traditionally attracted a more mature student – such as Mental Health Nursing.

•EU exit may have a significant impact on Gloucestershire. Although numbers of staff from the EU may be relatively small across the NHS in Gloucestershire (less than 4%), It is recognised that there are some services/teams with a higher concentration which may be impacted. Impact assessments have been made. However of greater note for Gloucestershire Integrated Care Service is the relatively high percentage of EU staff in Care services (approximately 12%)

Gloucestershire's Integrated Care Service's Workforce Development Plan:

•Recruitment & Retention - Over the next 5 to 10 years the labour force age projected to show the largest growth is the 60-70 age group. This combined with the changing in state pension's age (particularly for women) will mean that overall our labour force will have an older age prolife. To guarantee the retention of skills, knowledge and experience there is a need to ensure that we can preserve these older, more experienced staff members in a way that is both productive and beneficial for both staff member and employer.

•developing new routes of supply – University of Gloucestershire Nursing College - The first cohort of general nursing degree students are soon to start their 3rd year of study. There are 60 students who will qualify in the summer of 2020. The 30 students undertaking the mental health nursing degree will be starting their 2nd year in September. 30 Paramedic students commenced training in January and we are exploring with the university the feasibility of an additional intake this year. The University has had approval to run an undergraduate degree in Physiotherapy and 30 students have commenced on this programme in September. 41 Trainee Nursing Associates are starting their second year with further intakes each of 42 students planned to start in September and April.

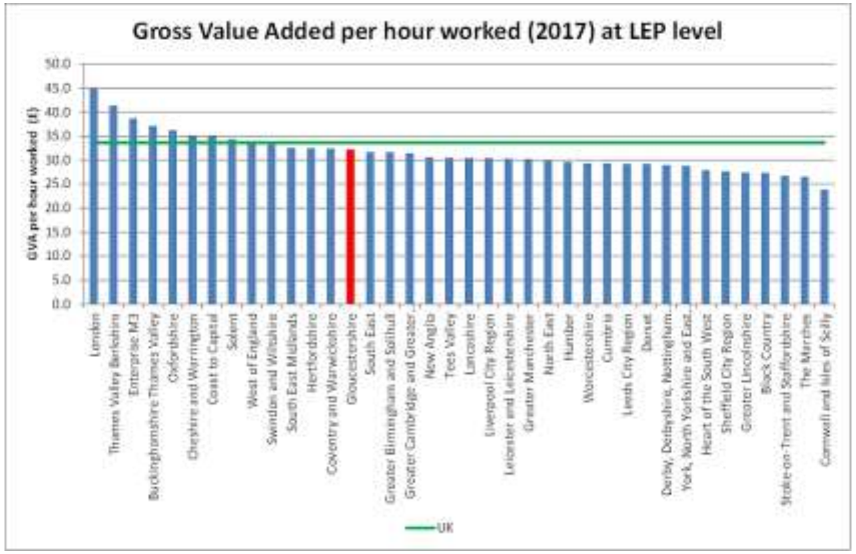
[67] Source 2018 NMDS-sc – taken from 2017/2018 data inputs

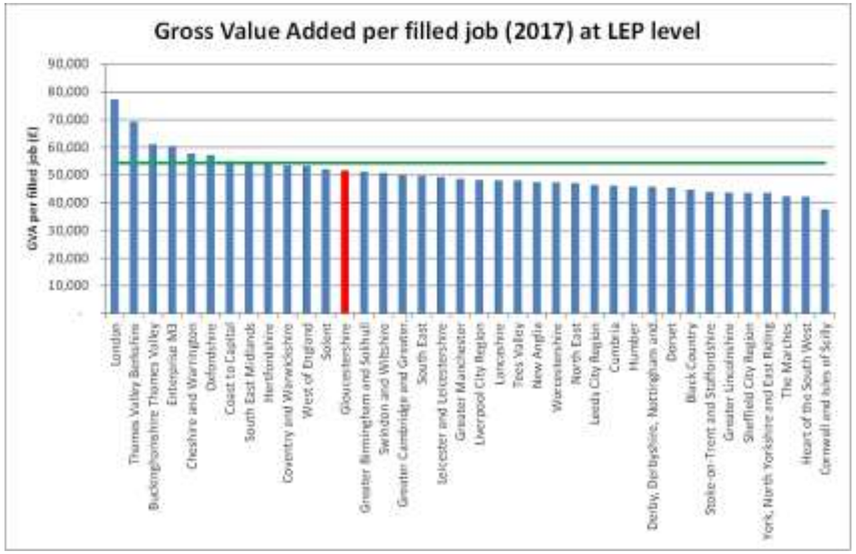
•Apprenticeships – A greater focus on effective use of apprenticeship levy will be required in 2019/10 – to support “all entry level jobs to be offered as apprenticeships”. Plans have been developed to create an apprenticeship hub for the county, funding will need to be agreed before this can be implemented. The hub will enable apprenticeships to be considered across the ICS, supporting both health and care in an integrated way and supporting the delivery of the long term plan. (there is more information about this is the future skills section of this document).

•“Proud to Care” - aiming to raise profiles of careers in care, the primary recruitment tool of Gloucestershire’s Adult Social Care Service.

• Succession Planning and Upskilling - Clinical Care Pathways support; aimed at supporting skills required for transformation of services across One Gloucestershire including: Young onset dementia; Respiratory clinical pathway; End of Life Care; Falls and Rehab; Falls prevention; Cancer Pathway; Circulatory clinical pathway (CVD and Hypertension); Stroke; Diabetes (Adults with a learning disability).

Productivity[68]





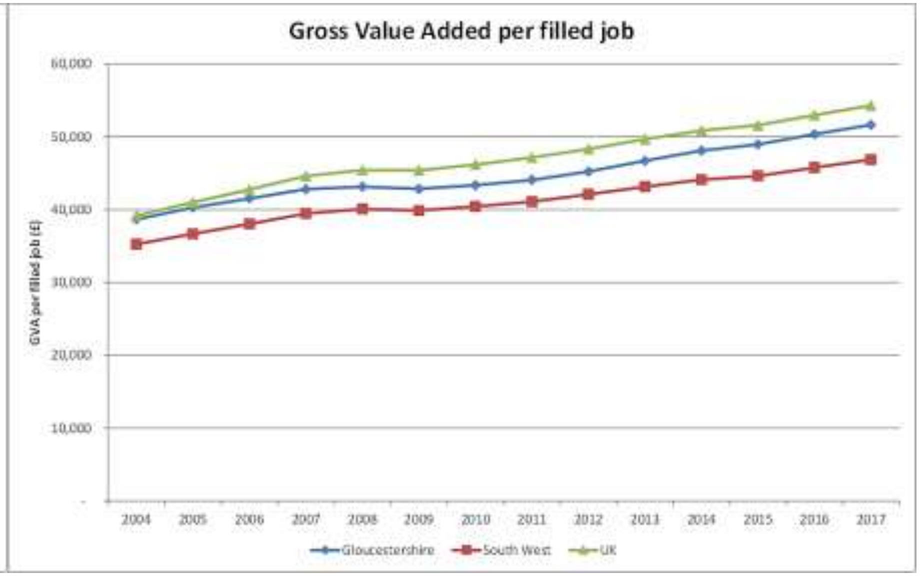
At a local level productivity is measured in terms of gross value added per worker or per hour worked rather gross domestic product.

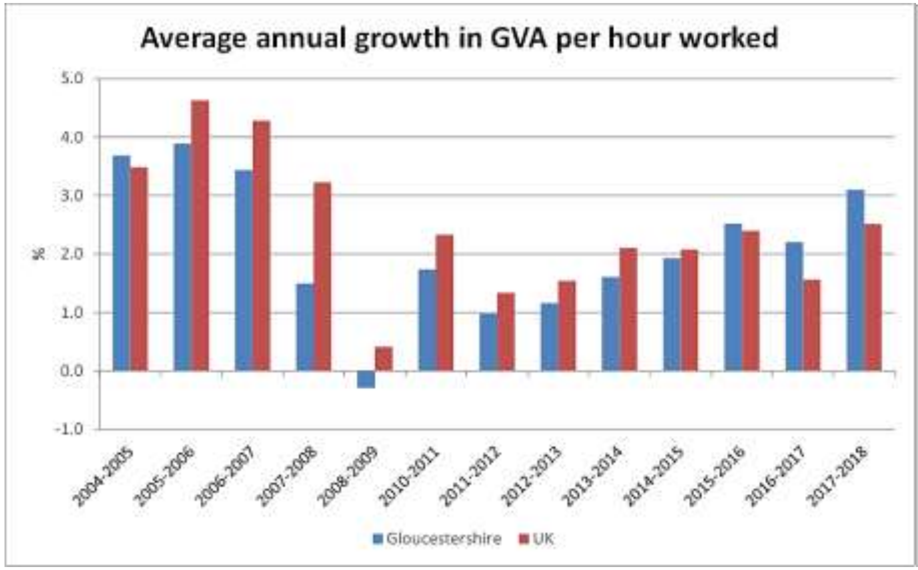
In 2017 Gloucestershire's GVA per hour worked was £32.2 this was above the South West average (£30.2) but 4.2% below the UK average (£33.6) . When compared to the other 37 Local Enterprise Partnerships, Gloucestershire has a rank of 14 out of 38 (1 having the highest GVA per hour worked). Of those Local Enterprise Partnerships that have a higher GVA per hour worked than Gloucestershire the majority (8 out of 13) are located in London, South East of East England, the exceptions to these are the West of England LEP, Cheshire and Warrington, Swindon and Wiltshire, South East Midlands and Coventry and Warwickshire.

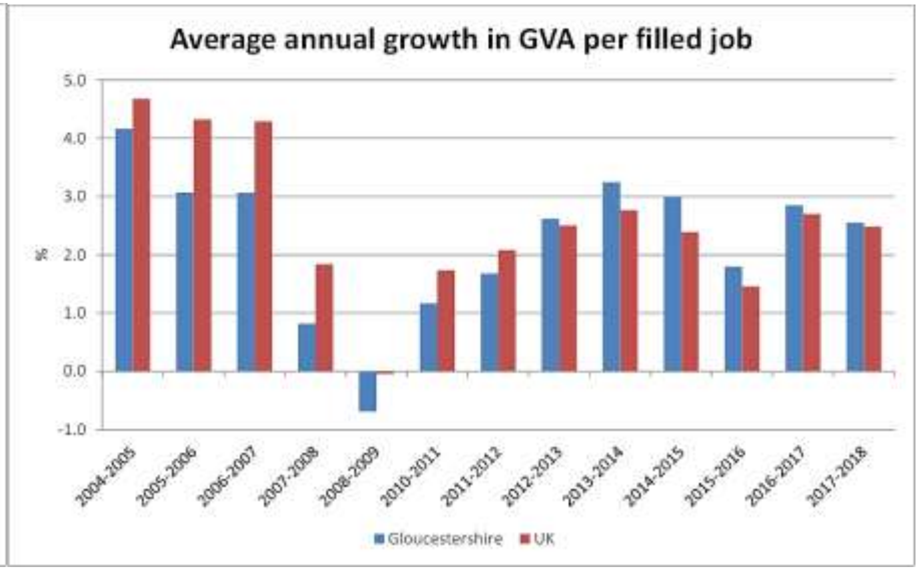
Gloucestershire GVA per filled job stood at £51,664 in 2017, which as with GVA per hour worked was above the South West average (£46,888) but 4.9% below the national average of (£54,330). The picture when compared with other LEP's is also very similar to that observed with GVA per hour worked, with Gloucestershire again having a rank of 13 out of 38 (1 having the highest GVA prefilled job). Of those Local Enterprise Partnerships that have a higher GVA per filled job than Gloucestershire the majority (8 out of 12) are located in London, South East of East England, the exceptions to these are the West of England LEP, Cheshire and Warrington, South East Midlands and Coventry and Warwickshire.

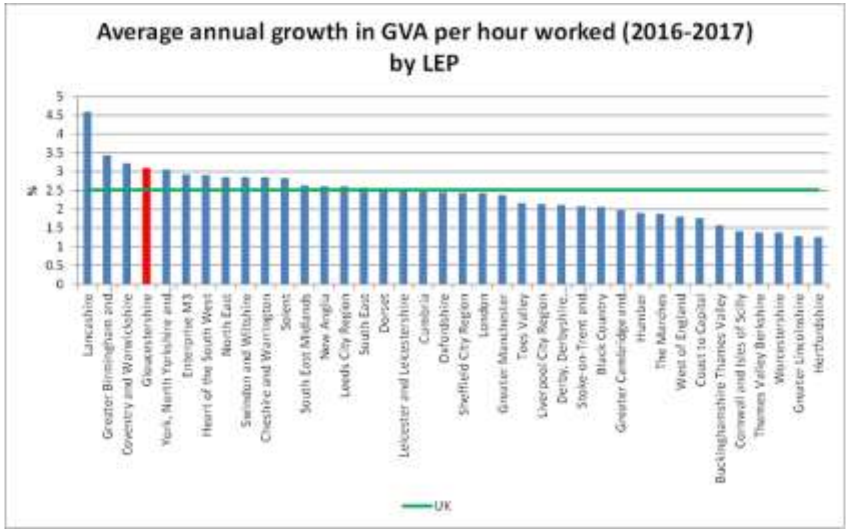
[68] Sub regional productivity, ONS

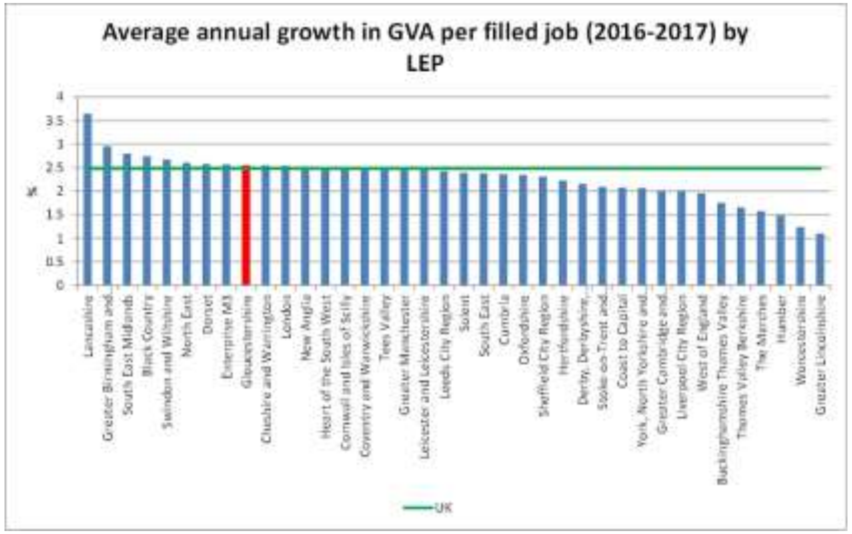

Gross Value Added per hour worked
GVA per hour worked (£)
40.0
35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0
2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017
Gloucestershire
South West
UK


Gross Value Added per filled job
GVA per filled job (£)
60,000
50,000
40,000
30,000
20,000
10,000
-
2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017
Gloucestershire
South West
UK


Average annual growth in GVA per hour worked
%
5.0
4.0
3.0
2.0
1.0
0.0
-1.0
2004-2005 2005-2006 2006-2007 2007-2008 2008-2009 2010-2011 2011-2012 2012-2013 2013-2014 2014-2015 2015-2016 2016-2017 2017-2018
Gloucestershire
UK


Average annual growth in GVA per filled job
%
5.0
4.0
3.0
2.0
1.0
0.0
-1.0
2004-2005 2005-2006 2006-2007 2007-2008 2008-2009 2010-2011 2011-2012 2012-2013 2013-2014 2014-2015 2015-2016 2016-2017 2017-2018
Gloucestershire
UK





When compared to the other 37 Local Enterprise Partnerships, Gloucestershire is ranked 12 out of 38 Local Enterprise Partnerships in terms of average annual growth in GVA per hour between 2012 and 2017. The recent growth in Gloucestershire's GVA per hour means Gloucestershire's position relative to other Local Enterprise Partnerships has improved considerably, When looking at the more recent period of 2016-17 Gloucestershire ranks 4th out of 38 Local Enterprise Partnerships. Gloucestershire is ranked 7 out of 38 in terms of growth between 2012 and 2017 and 9 out of 38 during the period 2015 and 2016. Gloucestershire's performance in terms of growth in GVA per job was noticeably better than its performance in terms of GVA per hour worked during the period 2011-2016, this is due to a growth in the proportion of people working full-time which was experienced to a lesser extent by other local enterprise partnerships.

The 2016 UK Competitiveness Index[69] ranks GFirst as the 14th (out of 38) most competitive LEP in the country. Similarly, in 2012, LEP Network data placed GFirst as the 9th most resilient LEP area. Total output of the county's economy represents 13% of the value of output in the South West and 1% of the UK economy[70]. According to latest figures, GVA per head in Gloucestershire is £26,093, on a par with the UK (£26,621) and above the South West average (£23,091). Manufacturing in Gloucestershire is a significantly higher percentage than nationally[71], accounting for 15.2% of GVA compared to 10.2% nationally, and 12.2% of employment compared to 8% nationally.

In terms of both GVA and employment, some of the largest sectors in the county are; Distribution; Transport; Accommodation and Food; and Manufacturing, along with the Public sector (including education and health). In recent years the greatest growth in GVA has been in Business Service Activities[72] with average annual growth rates of 6.0%

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69 http://www.cforic.org/pages/uk-competitiveness.php

70 Gross Value Added ONS Balanced Approach which combines income and production.
https://www.ons.gov.uk/economy/grossvalueaddedgva/bulletins/regionalgrossvalueaddedbalanceduk/1998to2016

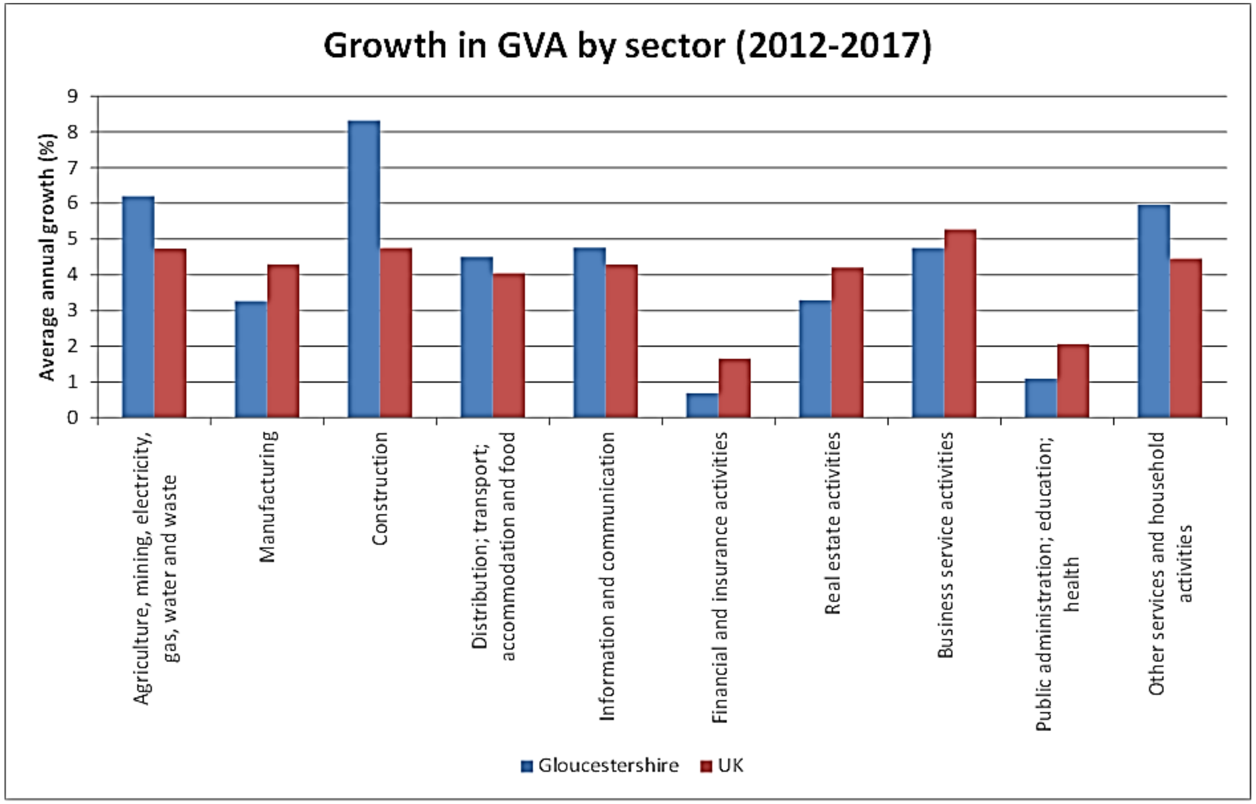
71 Regional gross value added (balanced) by local enterprise partnership in England
https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedbalancedbylocalenterprisepartnershipinengland

72 Regional gross value added (balanced) by local enterprise partnership in England

and 5.0% respectively[73], this sector has also seen high rates of growth in employment with an average annual growth rate of 4.4%. Other sectors experiencing high rates of employment growth[74] include Property (6.1%) and Agriculture, Gas, Electricity and Water (4.1%)[75]

Labour productivity is an important factor in determining the productive potential of the economy. Countries with strong labour productivity growth tend to benefit from high rates of growth and low inflation. Labour productivity can be calculated as output per worker, output per job or output per hour; with the latter being the more conventional approach.

High rates of GVA growth are forecast in ICT, property and business services (all key aspects of the knowledge intensive service sector). However, the model predicts that the contribution of these sectors to output (based on the forecast location quotients) will remain below the national average. The manufacturing sector is forecast to grow and is expected to continue to be significant in terms of economic output relative to the rest of the UK.

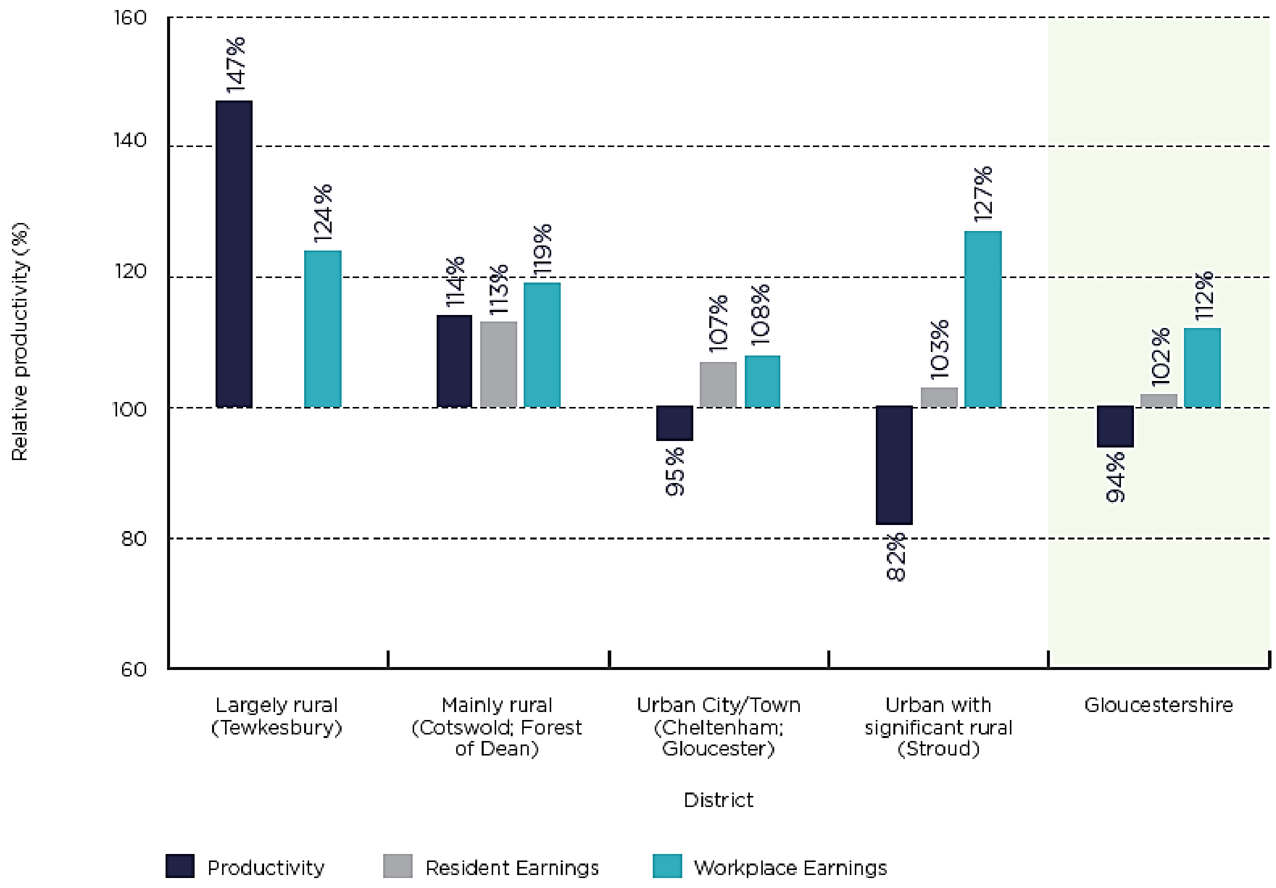


https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/regionalgrossvalueaddedbalancedbylocalenterprisepartnershipinengland

[73] This relates to the period 2006 -2016

[74] Business Register Employment Survey, ONS via www.nomisweb.co.uk

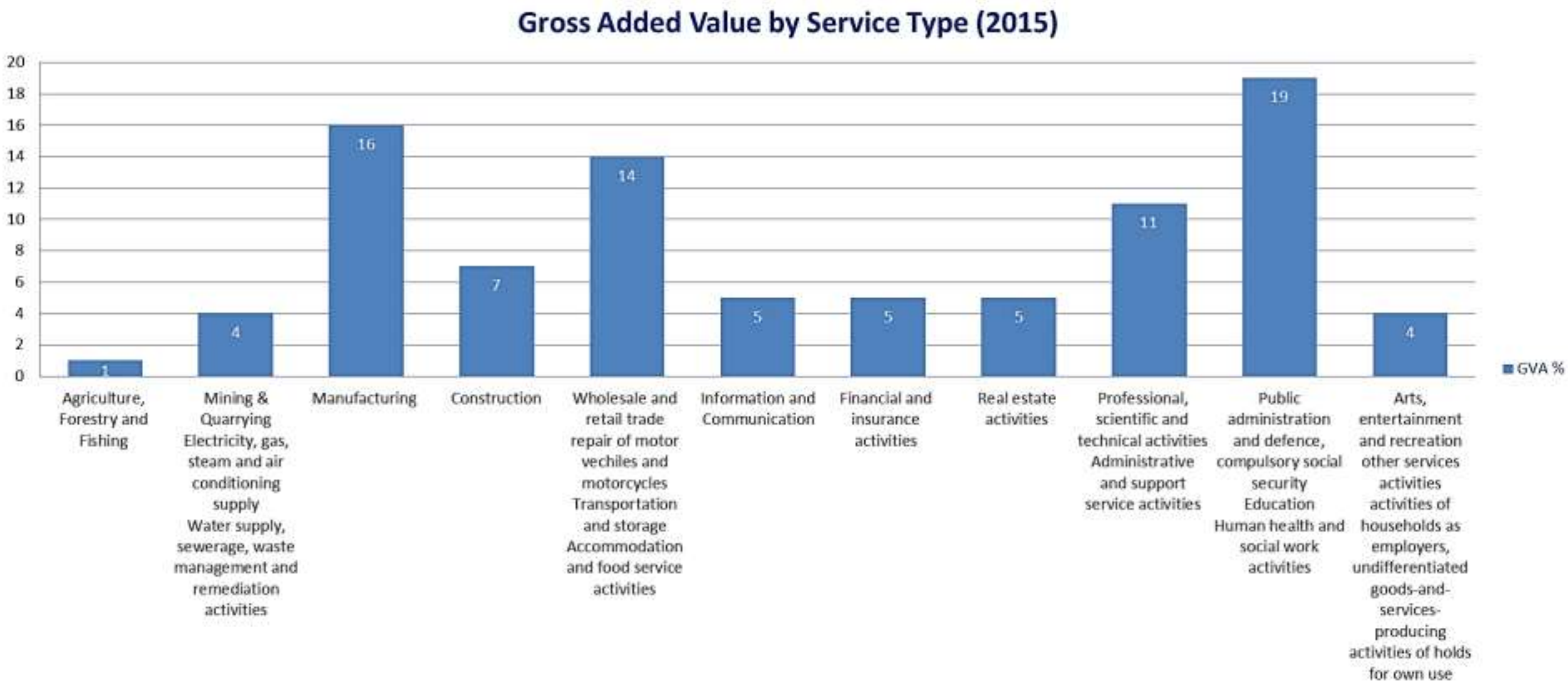
[75] This relates to the period 2009-2015



Productivity and earnings relative to Local Authorities with similar urban/rural designations, 2018

29% of the Gloucestershire population live in rural areas compared to 17% nationally. The area therefore has a 70% higher rural population than average. The above illustrates Department for Environment, Food and Rural Affairs (Defra) figures comparing the productivity of Local Authority areas with comparator areas with similar urban/rural splits. This shows that in Gloucestershire strong productivity is not – as may sometimes be the perception – confined to urban areas. Strong GVA performance in Tewkesbury may be explained by the presence of specialist manufacturing there (e.g. for aviation). In the case of Cotswold, it may be related in part to higher value tourism services that bring significant income derived from local AONB status. Food manufacturing is the UK's largest manufacturing sector and the agricultural sector in Gloucestershire is anchored by several large companies that help integrate the production, manufacturing and distribution supply chains in the area, making it a setting for significant innovation across the supply chain.[76]

[76] Gfirst LIS Five Foundations of Productivity



[77]

Gloucestershire's significant sectors for GVA are:

Public admin and defence (19%), Manufacturing (16%), Wholesale and retail (14%), Real estate activities (13%), Professional, scientific and technical (11%).

[77] https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/gvaforlocalenterprisepartnerships

N.B. The SIC codes have been grouped together by the ONS for GVA, the employment figures have been added together to match the GVA groupings.

SECTION THREE

FUTURE SKILLS

Categories of schools

Gloucestershire has a wide diversity of mainstream school provision with:

- Community schools (infant, junior, primary, secondary and special)
- Voluntary Aided schools (primary and secondary)
- Voluntary Controlled schools (infant, junior and primary)
- Foundation schools (infant, junior, primary and secondary)
- Academies/Free Schools (primary, secondary, special, UTC and Post 16).

As at November 2018 there are 204 maintained schools and 93 academies/free schools in Gloucestershire giving a total of 297 schools overall. The table below gives a breakdown of schools in Gloucestershire by category.

Category	Primary	Secondary	Special	Total
Community	85	1	8	**94**
Foundation	16	4		**20**
Academy	53	34	3	**90**
Voluntary Aided	39			**39**
Voluntary Controlled	51			**51**
Free School	2	1		**3**
Total	**246**	**40**	**11**	**297**

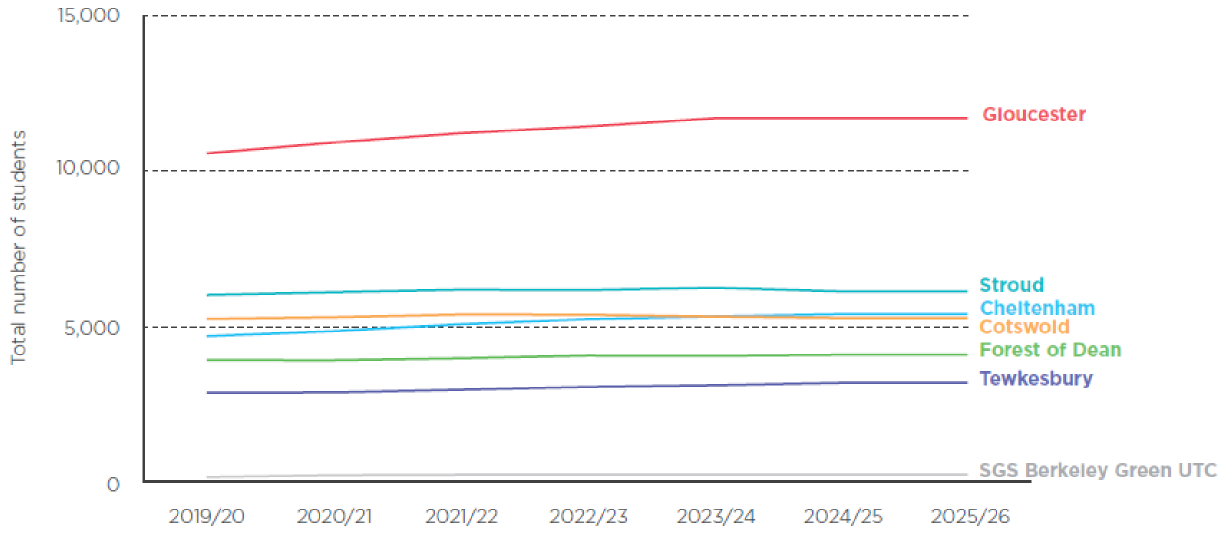
There are five selective single sex grammar schools and two selective co-ed grammar schools in Gloucestershire places are open to all students both in county and across county borders, subject to meeting the admission criteria. All of the grammar schools have recently increased in capacity. In total 198 additional grammar school places have been provided since 2016.

The schools are:

- Pates Grammar School (Co-educational) – Cheltenham
- Marling School (Boys) – Stroud
- Stroud High School (Girls) – Stroud
- High School for Girls (Girls) – Gloucester
- Ribston Hall High School (Girls) – Gloucester
- Sir Thomas Rich's School (Boys) – Gloucester
- The Crypt Grammar School (Co-educational from 2018) – Gloucester

Secondary School Placement Forecasts

Secondary school projections show an increase in pupil numbers between Sept 2018 and Sept 2024 for the county as a whole. The rising numbers in primary schools began to impact on the future demand for Year 7 places, with forecasts now indicating an increase of 612 pupils at Year 7 between Sept 2018 and Sept 2024. Post 16 places are primarily within local academy 6th forms or local FE college provision. Post 16 places in local academies have reduced steadily from 6376 in 2014/15 to 5925 in 2018/19. FE college places show a similar trend. It is anticipated that this trend will reverse from 2019/20 onwards, reflecting the increasing school population pre 16. Berkeley Green is a relatively new University Technical College (UTC) with numbers expected to increase at a much greater rate while it becomes established.



Planning Area	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	% Change 2019/20 to 2025/26
Forest of Dean	3916	3914	3983	4082	4071	4110	4110	5%
Tewkesbury	2875	2879	2973	3069	3126	3210	3210	12%
Cotswold	5242	5302	5401	5394	5325	5274	5274	1%
Stroud	6010	6105	6191	6177	6260	6132	6132	2%
Cheltenham	4685	4852	5077	5246	5338	5413	5413	16%
Gloucester	10554	10908	11212	11431	11700	11707	11707	11%
SGS Berkeley Green UTC	164	240	260	260	260	260	260	59%
Total	**33446**	**34200**	**35097**	**35659**	**36080**	**36106**	**36106**	**8%**

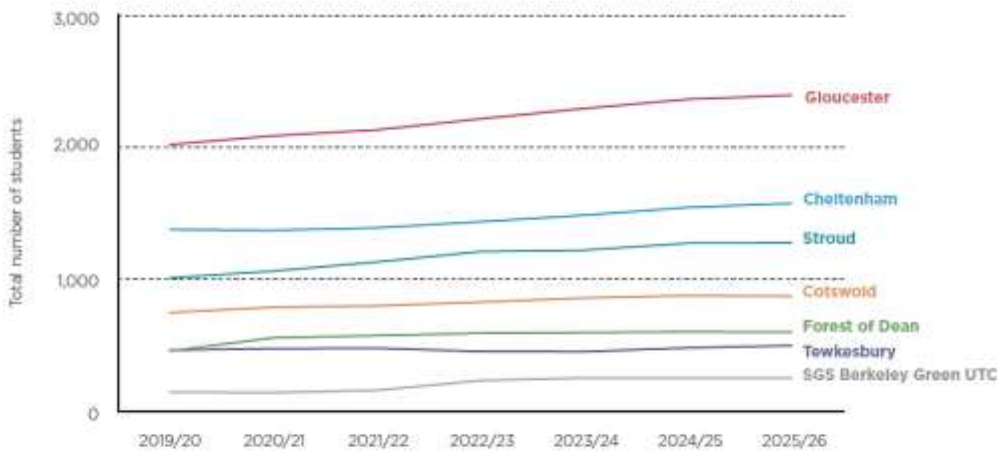
Post 16 places are primarily within local academy 6th forms or local FE college provision. Post 16 places in local academies have reduced steadily from 6376 in 2014/15 to 5925 in 2018/19. FE college places show a similar trend. It is anticipated that this trend will reverse from 2019/20 onwards, reflecting the increasing school population pre 16.

Gloucestershire County Council faces two specific issues in managing school places:

The demographic trend in the school population age range is largely driven by the birth rate – Since 2007 a upward trend in the birth rate in Gloucestershire averaged approximately 6692 births per calendar year between 2007 and 2017. This has put pressure on primary school places since 2012 which has been significant and will continue to be so as the peak 2007 to 2012 birth years feed through primary and secondary education. These figures do not account for the high number of children moving into the county due to migration, house moves, army relocations etc. All these issues are covered in more detail under the School organisation and planning issues section of the document.

Significant housing development across the county – 42,730 new homes delivered across the county between 1992 and 2009/10. The six district councils have varying timescales for future delivery of additional housing up to 2031. The Joint Core Strategy (JCS) has outlined a further 35,446 homes, of these 14,360 for Gloucester, 10,917 for Cheltenham and 10,169 for Tewkesbury between 2011 and 2031. Stroud have published the need for 11,400 new homes between 2006 and 2031.Cotswolds have published the need for 9614 new homes between 2011 and 2031 and Forest of Dean have published the need for 6200 between 2006 and 2026. Many of these developments are predominately concentrated around the outskirts of the two urban areas; however, there are pockets of new development being approved in more rural towns and villages in particular in the Cotswolds resulting in the need for additional school places or the take up of remaining surplus places.

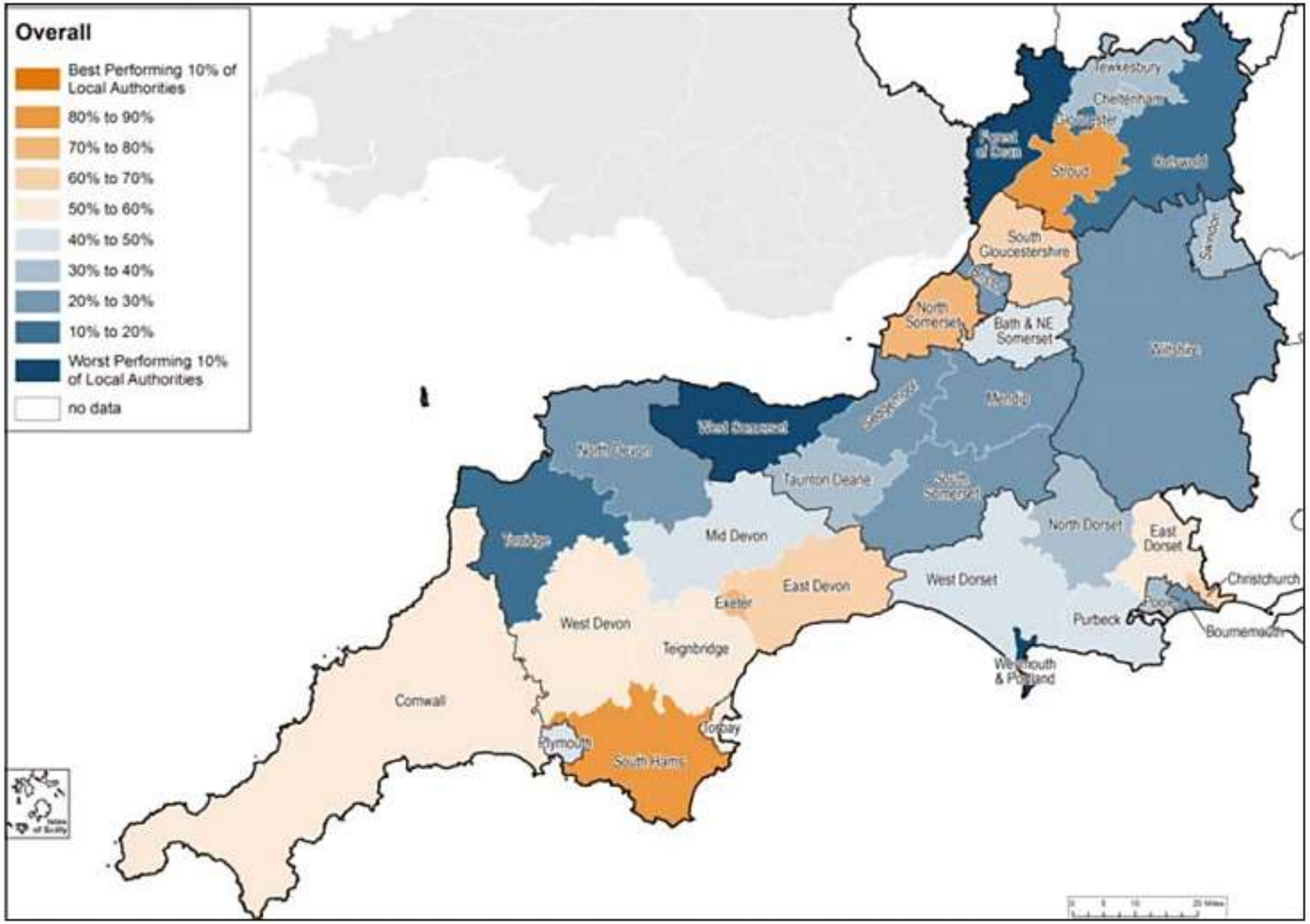
Forecast of Sixth Students by School planning Area



Planning Area	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	% Change 2019/20 to 2025/26
Forest of Dean	460	562	579	598	603	608	605	32%
Tewkesbury	467	480	483	457	455	486	504	8%
Cotswold	749	792	802	831	863	882	877	17%
Stroud	1012	1064	1134	1213	1224	1277	1280	26%
Cheltenham	1377	1371	1391	1437	1487	1547	1579	15%
Gloucester	2019	2086	2131	2215	2294	2364	2395	19%
SGS Berkeley Green UTC	150	146	164	240	260	260	260	73%
Total	6234	6501	6684	6991	7186	7424	7500	20%

Social Mobility

In the South West region, Stroud ranks 43 out 324, performing the best in the region.[78] Part of the explanation for poor social mobility in youth and working lives, in particular, is the rural nature of the South West region. Poor transport links make accessing education and quality jobs challenging. Businesses have an extremely low level of satisfaction with the infrastructure in the South West.



[78] State of the nation 2017: social mobility in Great Britain

KEY

HOTSPOT: GOOD SOCIAL MOBILITY

COLDSPOT: POOR SOCIAL MOBILITY

KEY
G:GLOUCESTER | **C**:CHELTENHAM | **CO**:COTSWOLD | **FD**:FOREST OF DEAN
S:STROUD | **T**:TEWKESBURY

	G	C	CO	FD	S	T
OVERALL RANK (1 to 324 where 1 is the best social mobility)	282	225	268	303	43	199

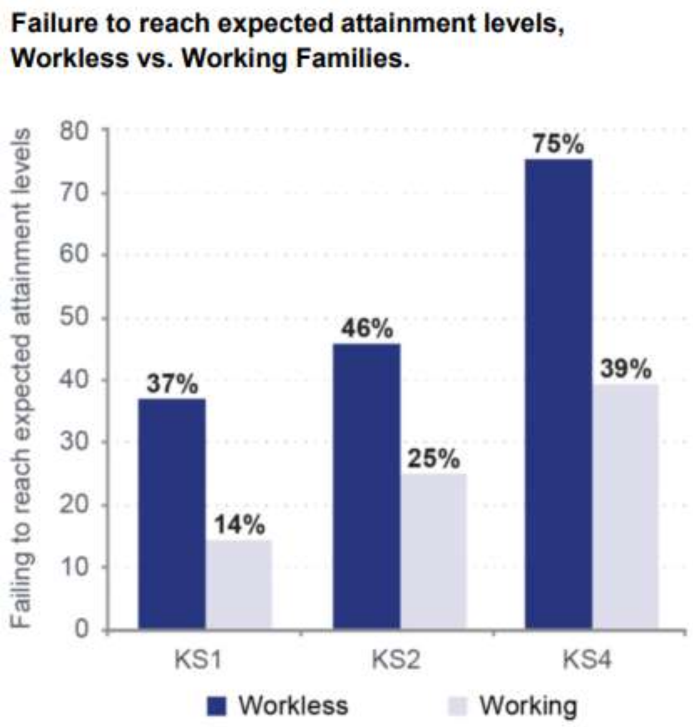
EARLY YEARS	G	C	CO	FD	S	T
OVERALL RANK	273	259	268	297	112	274
% of nursery providers rated 'outstanding' or 'good' by Ofsted (based on nursery location)	151	151	151	151	151	151
% of children eligible for free school meals achieving a 'good level of development' at the end of Early Years Foundation Stage (based on residence)	300	278	289	313	136	304

SCHOOL	G	C	CO	FD	S	T
OVERALL RANK	231	101	59	267	53	103
% of children eligible for free school meals attending a primary school rated 'outstanding' or 'good' by Ofsted (school location)	59	23	51	165	39	10
% of children eligible for free school meals attending a secondary school rated 'outstanding' or 'good' by Ofsted (school location)	247	75	54	275	133	147
% of children eligible for free school meals achieving at least the expected level in reading, writing and maths at the end of Key Stage 2 (based on residence)	154	273	214	241	124	202
Average attainment 8 score for pupils eligible for free school meals (based on residence)	311	159	89	235	74	199

Source of 2016 data: www.gov.uk/government/publications/social-mobility-index
Source: www.gov.uk/governmnet/publications/social-mobility-index-2017-data

YOUTH	G	C	CO	FD	S	T
OVERALL RANK	300	311	323	252	86	239
% of young people eligible for free school meals that are not in education, employment or training (positive destination) after completing KS4	227	322	301	251	19	161
Average points score per entry for young people eligible for free school meals at age 15 taking A-level or equivalent qualifications (based on residence)	254	139	324	105	36	188
% of young people eligible for free school meals at age 15 achieving 2 or more A-levels or equivalent qualifications by the age of 19 (based on residence)	302	247	185	243	106	237
% of young people eligible for free school meals at age 15 entering higher education by the age of 19 (based on residence)	275	275	275	275	275	275
% of young people eligible for free school meals at age 15 entering higher education at a selective university (most selective third by UCAS tariff scores) by the age of 19 (based on school location at 15)	230	230	230	230	230	230

WORKING LIVES	G	C	CO	FD	S	T
OVERALL RANK	126	80	158	222	59	77
Median weekly salary (£) of employees who live in the local area, all employees (FT and PT)(based on residence)	204	113	243	250	126	146
Average house prices compared to median annual salary of employees who live in the local area (based on residence)	115	70	292	124	193	166
% of people that live in the local area who are in managerial and professional occupations (SOC 1 and 2)(based on residence)	222	49	30	238	130	134
% of jobs that are paid less than the applicable Living Wage Foundation living wage (based on job location)	58	116	113	242	50	48
% of families with children who own their home (based on residence)	176	158	201	81	44	98



Children growing up in workless families are almost twice as likely as children in working families to fail to reach the expected attainment levels at all stages of their education

Source: Improving Lives Helping Workless Families, DWP, 2017.

Children who grow up with workless parents are more likely to be workless themselves as adults, in comparison to children who grow up with working parents.

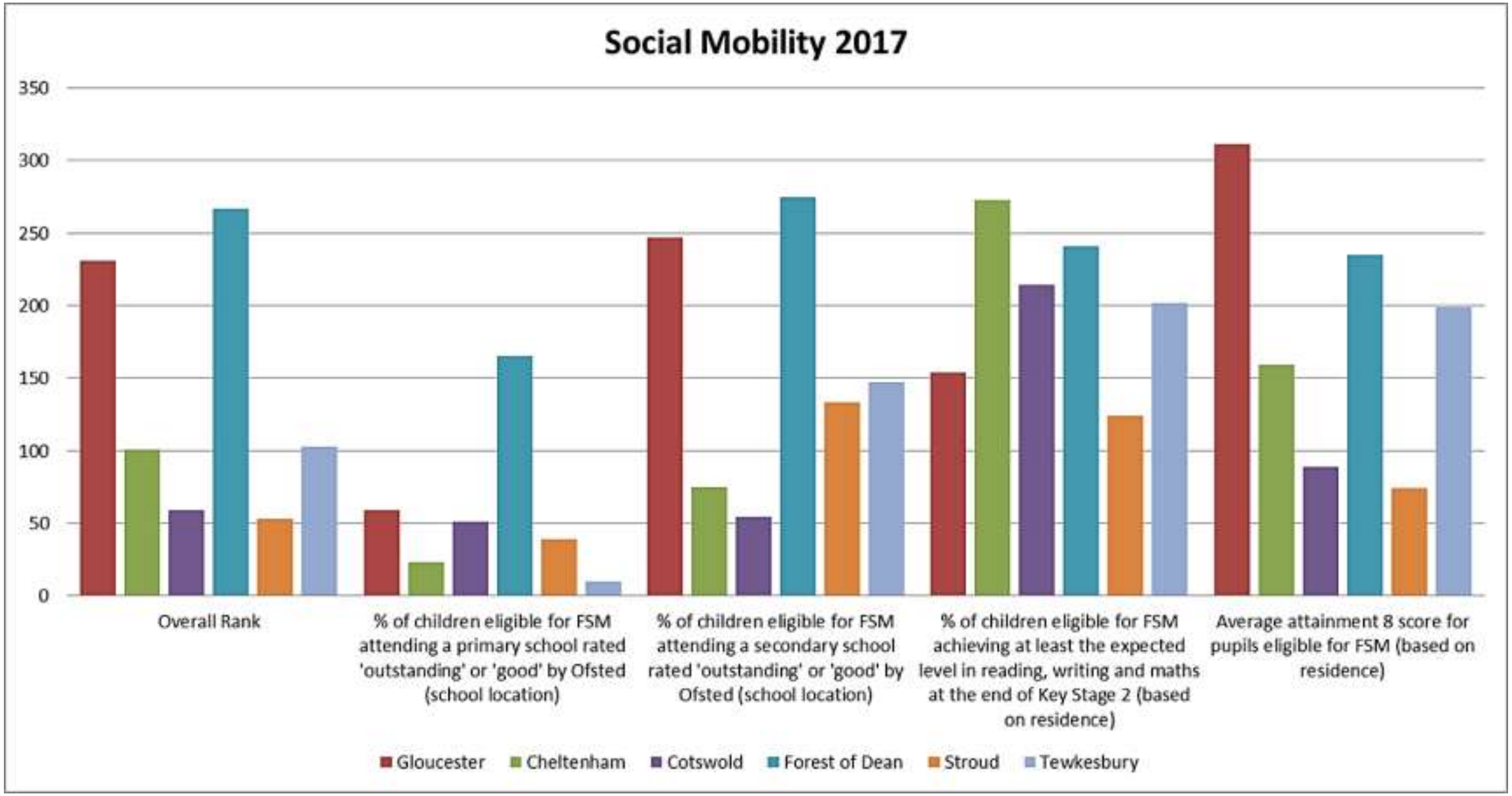
Sources:
Children in jobless households across Europe: Evidence on the association with medium- and long-term outcomes, Gregg et al, 2017.

Intergenerational transmission of worklessness: Evidence from the Millennium Cohort and the Longitudinal Study of Young People In England, Schoon et al, 2012

Free School Meals

Measuring Free School Meals (FSM) is a proxy measure of disadvantage.

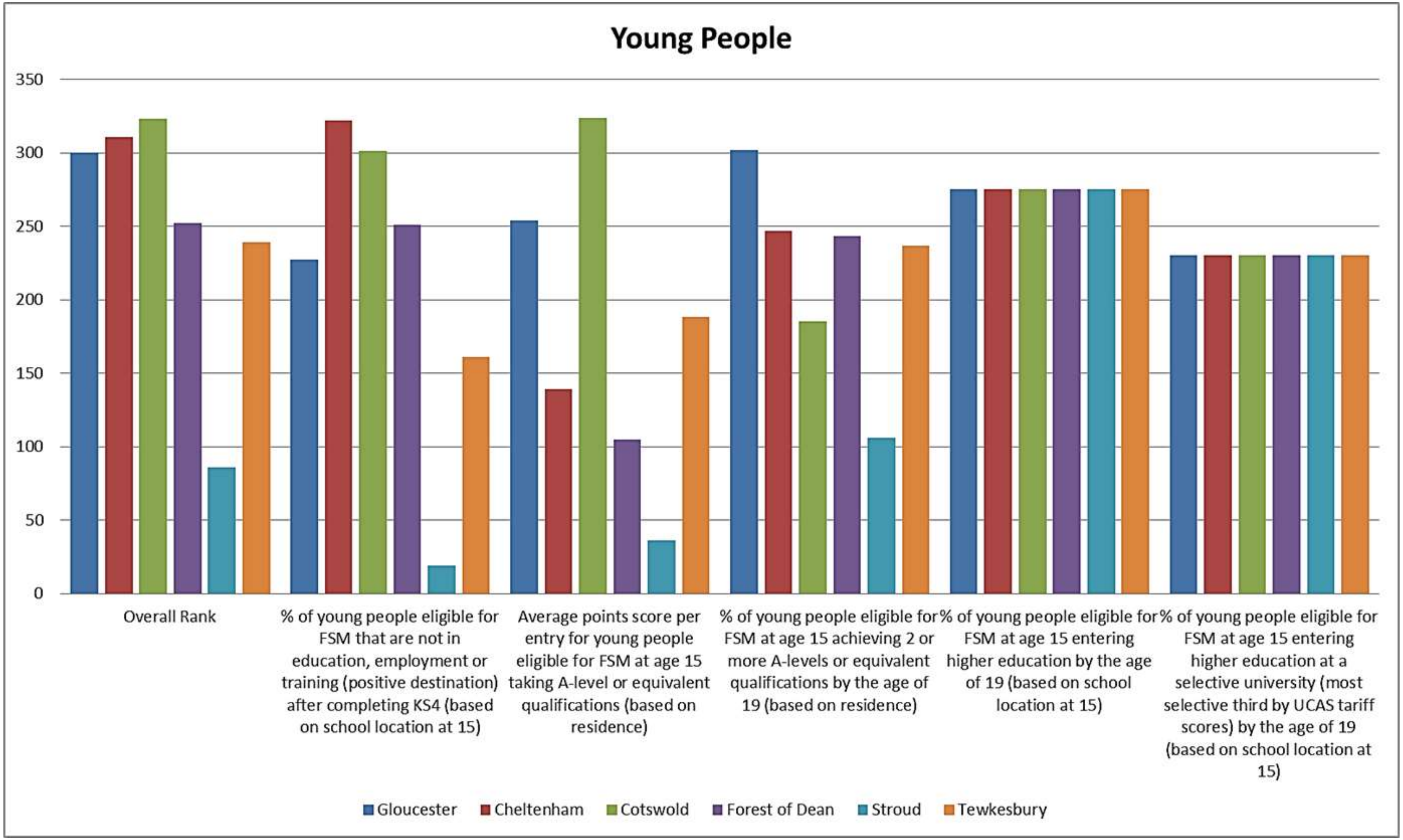
Social Context:					Index of Multiple Deprivation 2015	
	Primary FSM Eligibility 2018 (inc. Nursery)	Secondary FSM Eligibility 2018	Primary First language other than English 2018	Secondary First language other than English 2018	Average Score	Rank of Average Score
Percentage	10.40	7.30	8.20	6.00	15.01	123*
Rank	37	22	42	47		
England %	13.70	12.40	21.20	16.60	* - 1 being most deprived	



Source https://www.gov.uk/government/publications/social-mobility-index

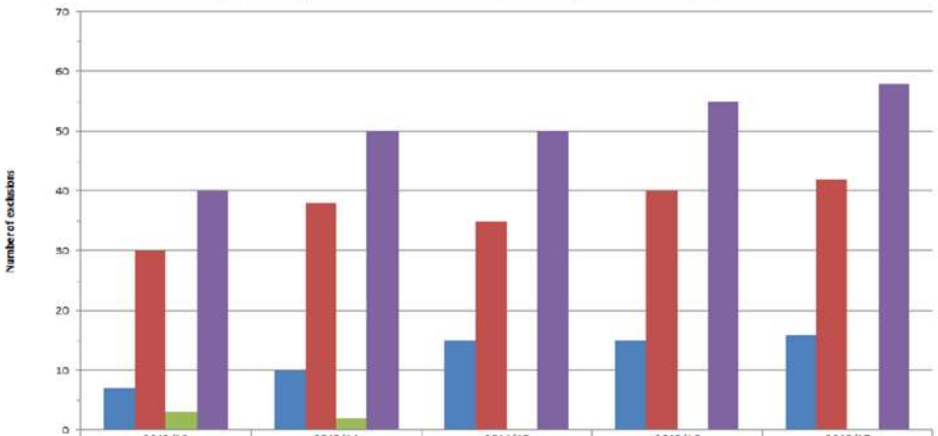
The Social Mobility Index (2017) shows that three districts in Gloucestershire (Cotswold, Forest of Dean and Gloucester) are ranked in the bottom 20% nationally. However, Stroud district is the highest ranking local authority area in the South West, suggesting that there might be potential to learn from and build on what works in that part of the county.

Area	Social Mobilty Index Ranking (out of 324)
Cheltenham	225
Cotswold	268
Forest of Dean	303
Gloucester	282
Stroud	43
Tewkesbury	199



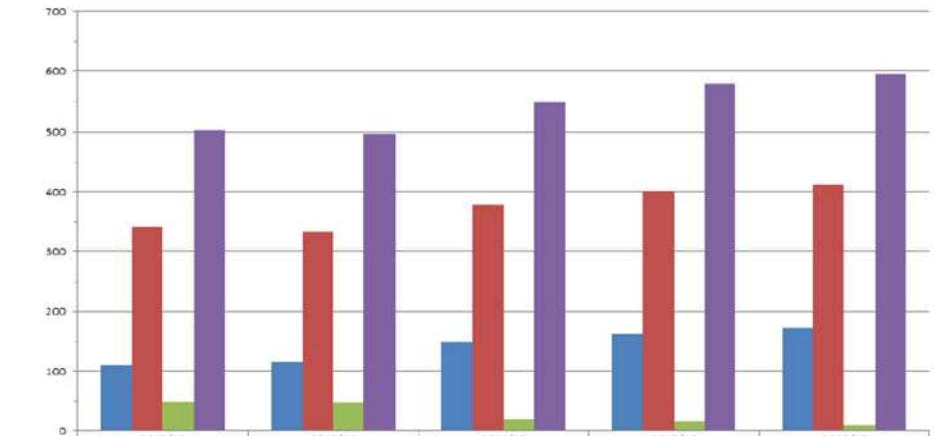
Source of 2017 data : https://www.gov.uk/government/publications/social-mobility-index-2017-data

Pupils in receipt of Free School Meals at time of permanent exclusion



	2012/13	2013/14	2014/15	2015/16	2016/17
Primary	7	10	15	15	16
Secondary	30	38	35	40	42
Special	3	2	0	0	0
Total	40	50	50	55	58

Pupils in receipt of Free School Melas when they were excluded for a fixed period

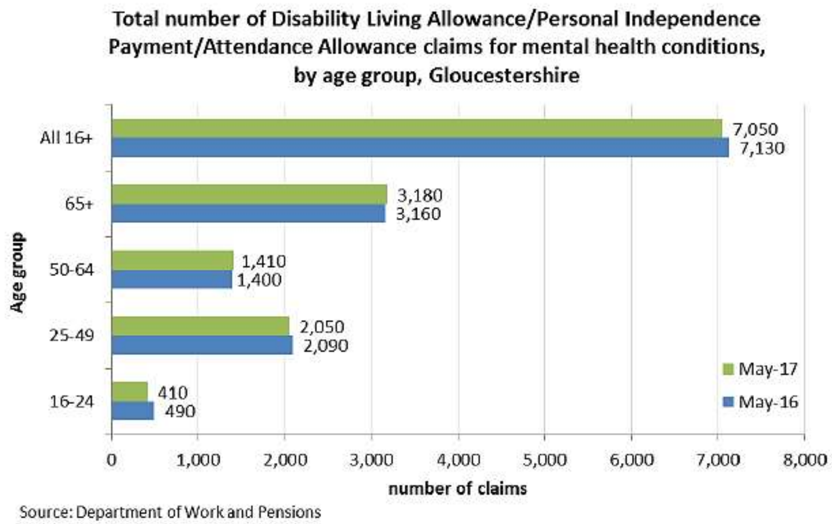


	2012/13	2013/14	2014/15	2015/16	2016/17
Primary	111	115	149	163	172
Secondary	343	334	379	401	413
Special	49	48	21	16	10
Total	503	497	549	580	595

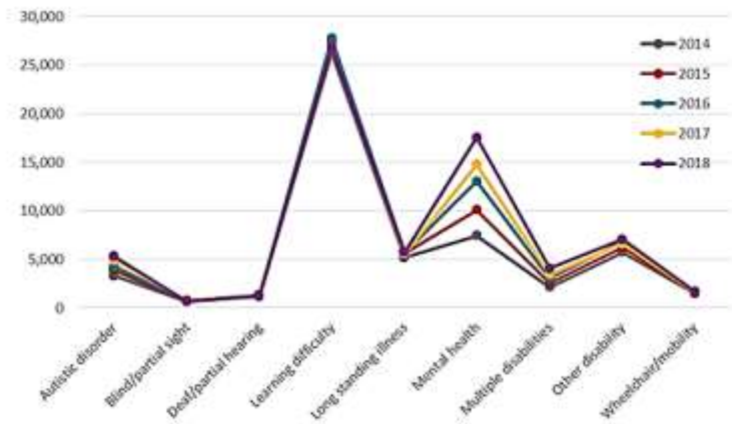
In 2016/17 58 pupils (41% of all excluded pupils) were in receipt of free school meals when they were permanently excluded. In comparison, 55 FSM pupils (40%) were excluded in 2015/16. 51% of primary school pupils excluded in 2016/17 were in receipt of free school meals.

In 2016/17 595 pupils (34%) were in receipt of free school meals when they were excluded for a fixed period. This compares to 580 FSM pupils (35%) excluded in 2015/16. 56% of primary school pupils were in receipt of free school meals when they were excluded.

Gloucestershire has a well-established and growing approach to helping people with disabilities in to employment through the county council's Forwards scheme and the Going the Extra Mile (GEM) project. This includes offers such as supported internships, which are delivering positive outcomes for those seeking work and contributing to a closing of the gap. An estimated 11,900 people aged 18 and over in Gloucestershire will have a learning disability in 2020. Of these, 2,420 have a moderate or severe learning disability. There were 3,623 people in Gloucestershire diagnosed by local GPs as having a learning disability in 2017/18. While the overall number of adults with moderate or severe learning disability is predicted to rise by 5.8% between 2020 and 2030.



In Higher Education



Since 2014, the number of applicants declaring a mental health condition has increased from 7,433 to 17,520. Note: this is a non-mandatory question and the data should be used as a guideline only.[79]

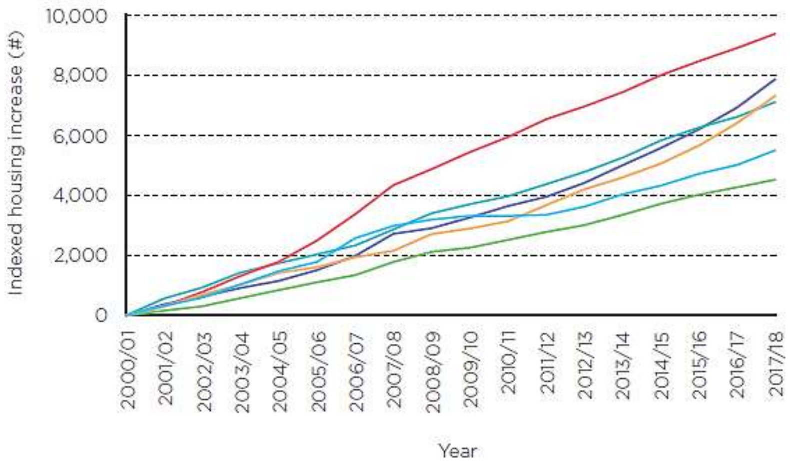
[79] UCAS

Housing

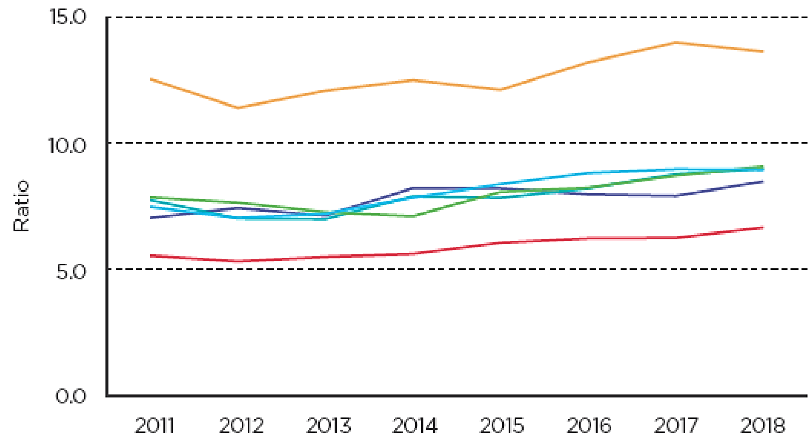
Gloucestershire has an overall median housing affordability ratio of 8.5 in 2018. This ratio is calculated by dividing house prices by workplace gross annual earnings. A lower ratio figure therefore suggests that houses are more affordable. Affordability over time. In particular, this shows that Cotswold district has remained by far the area of least affordable housing, while the reverse is true for Gloucester. All districts have seen a small increase in the affordability ratio over the period, due to the rise in house prices at the same time as wages have been stagnating.

When comparing the Local Authorities in Gloucestershire and each of the comparator LEP areas, Gloucestershire has the largest range in affordability of all the areas, with Gloucester having the most affordable housing of all comparator areas (at 6.68) while Cotswold has the least affordable (at 13.63), compared to the next highest area (South Oxfordshire at 12.36). However, both Oxfordshire and Worcestershire have a higher overall affordability ratio than Gloucestershire, at 10.44 and 8.88 respectively.

Growth in Housing Since 2000



Affordability ratio over time for the Gloucestershire districts, 2011-18

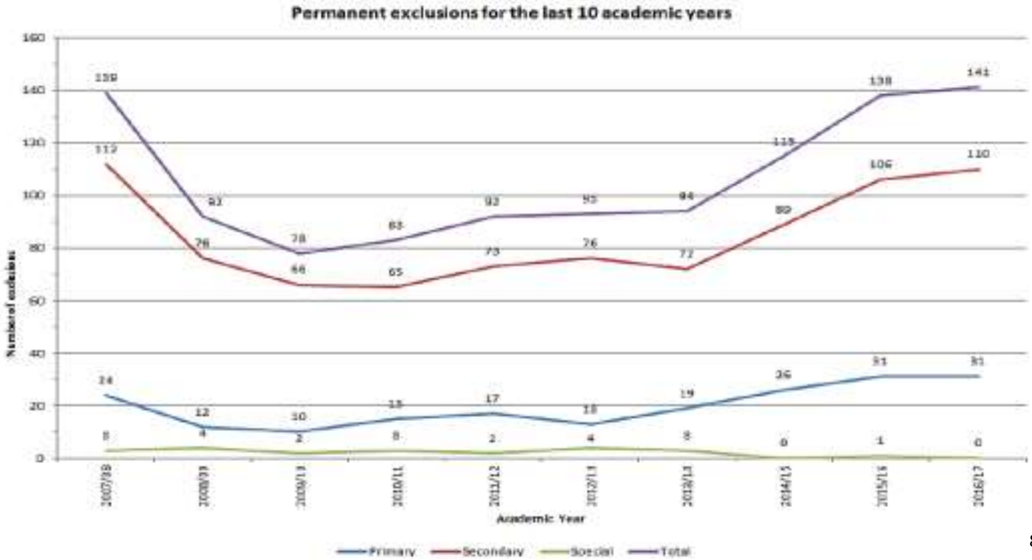


Cheltenham Cotswold Forest of Dean Gloucester Stroud Tewkesbury

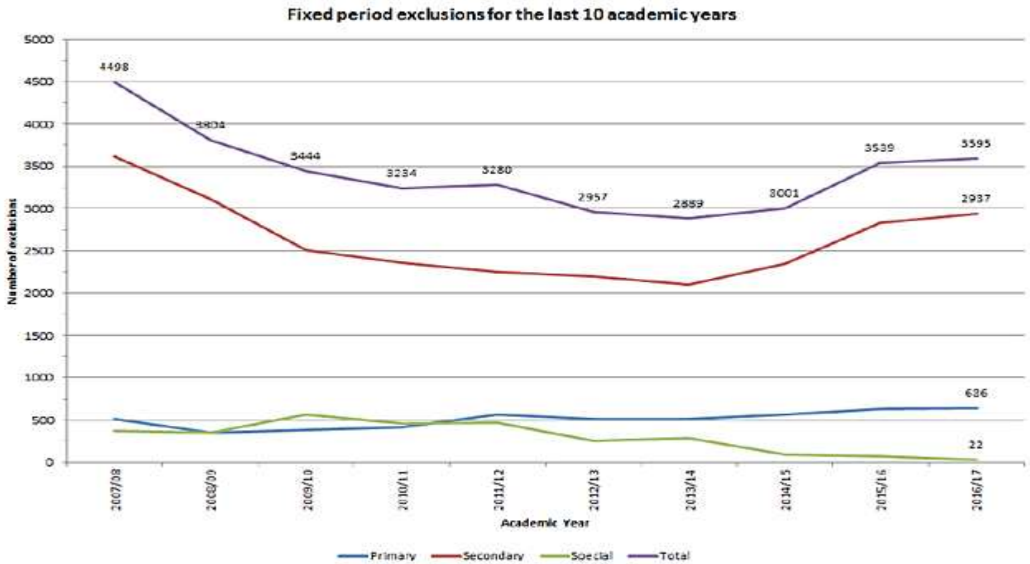
Help To Buy Scheme (South West) - Number of Help to Buy: Equity Loans (quarterly), by tenure, property type and local authority

Local authority data	All properties Cumulative completions (total):	Houses (total)	Houses of which freehold;	Houses of which leasehold;	Houses of which unrecorded	Houses Percentage freehold	Houses Percentage leasehold	Flats (total)	Flats of which freehold;	Flats of which leasehold;	Flats of which unrecorded	Flats Percentage freehold	Flats Percentage leasehold
Cheltenham	404	344	340	4	0	98.80%	1.20%	60	11	49	0	18.30%	81.70%
Cotswold	507	495	479	16	0	96.80%	3.20%	12	1	11	0	8.30%	91.70%
Forest of Dean	272	268	220	48	0	82.10%	17.90%	4	1	3	0	25.00%	75.00%
Gloucester	988	826	825	1	0	99.90%	0.10%	162	19	143	0	11.70%	88.30%
Stroud	440	407	407	0	0	100.00%	0.00%	33	5	28	0	15.20%	84.80%
Tewkesbury	1,063	1,019	966	53	0	94.80%	5.20%	44	8	36	0	18.20%	81.80%

Exclusions



[80]



141 Pupils were permanently excluded during 2016/17 academic year (this is the latest year in which data is available for Gloucestershire) and there were also 3,595 fixed period exclusions. Gloucestershire's permanent exclusion rate is higher that national rate and is increasing. In 2015/16 Gloucestershire was the highest permanent excluding Local Authority in comparison with its statistical neighbours, and the joint 16th highest excluding authority in England (out of 152 authorities).

A high proportion of permanently excluded pupils were from deprived areas and were in receipt of free school meals (2016/17 - 41%). The majority of permanent exclusions in 2016/17 are 'White – English' and male (73%). Males also account for nearly all (97%) of all primary exclusions.

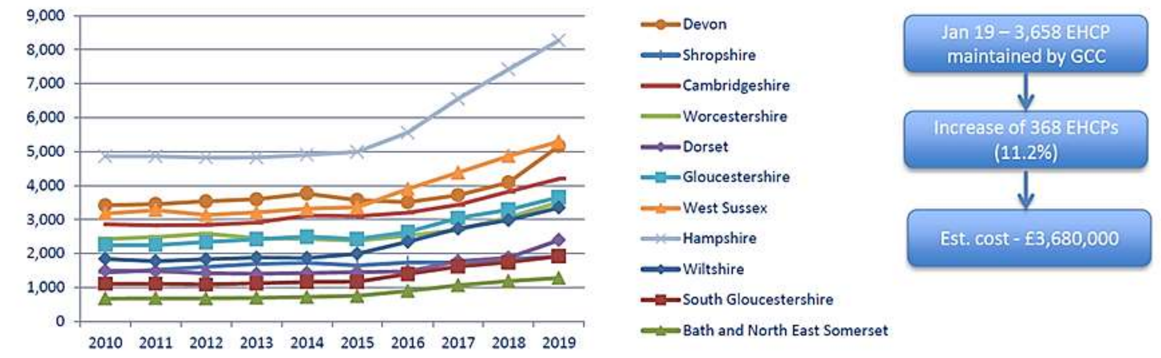
[80] Permanent Exclusions Task Group, Final Report May 2018

A Permanent Exclusions Task Group was set agreed by The Overview and Scrutiny Management Committee (OSMC) in September 2017.

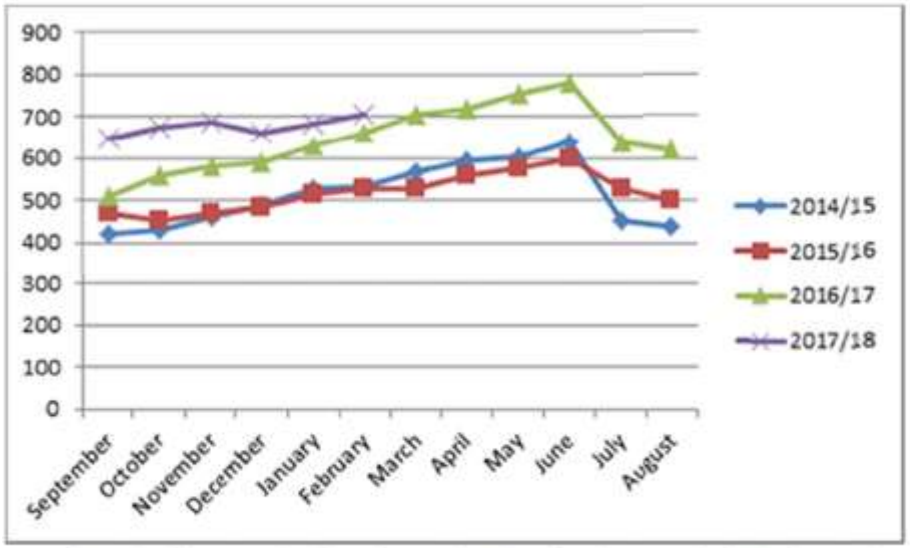
The figure shows that since this was set up the exclusion rate appears to have fallen in line with national standards.

Elective Home Education Register:

Increasing number of EHCPs



Since the SEN reforms came into effect in September 2014, the number of children and young people with a statement or an EHC plan in Gloucestershire has increased by 46.6%.



Note – figures include any pupil who has been on the register for at least one day during the month.

	2014/15	2015/16	2016/17
Primary aged	121	125	189 (+51%)
Secondary aged	185	183	281 (+54%)
TOTAL	306	308	470 (+53%)

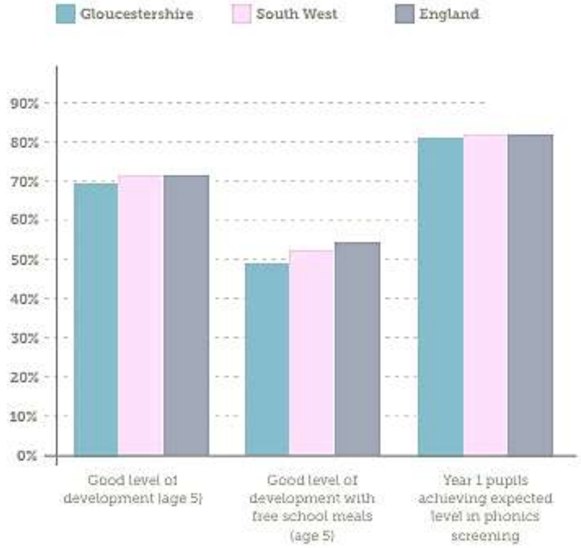
Number of New Starters on Elective Home Education Register

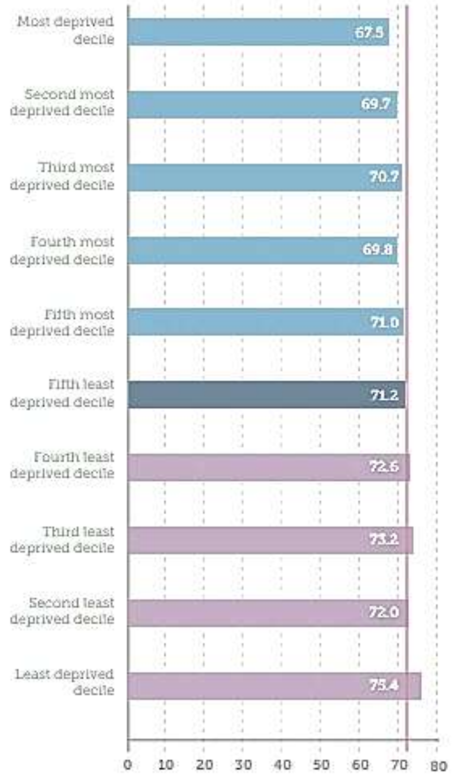
Early Years

A good level of development in a child's early years – often used to describe school readiness – is a measurement of a child's personal, social and emotional development, physical development, and communication and language, including literacy and numeracy. It is a key determinant of outcomes in later life; national analysis has shown that a child with a poor level of development at the age of five is unlikely to catch up with their peers by the time they leave education. This means that future employment and progression opportunities are likely to be more limited. Data published by Public Health England (Figure 4) shows that in 2017/18: - A lower percentage of five-year-old children in Gloucestershire reached a good level of development than in England - A lower percentage of five-year-old children in Gloucestershire who were eligible for free school meals reached a good level of development than in England - A lower percentage of children aged five or six (in Year 1) in Gloucestershire achieved the expected level in phonics (a method for teaching reading) than in England Eligibility for free school meals is used in Figure 4 to represent socio-economic disadvantage and we can see that children who are eligible for free school meals experience inequality in their early years development. Evidence strongly suggests that this inequality can continue into adult life.[81]

% of Children Reaching Early Years Development Levels

Percentage of Children Reaching Early Years Development Levels (2017/18)





[81] Public Health England (School readiness at age five in Gloucestershire by Indices of Multiple Deprivation (2015) deprivation decile)

School Performance Tables

Primary Performance		292 Schools	Overall Performance				
	% of Pupils Meeting expected standard	Reading	Writing	Maths	% of Pupils achieving at a higher standard	Average Score in reading	Average score in maths
Gloucestershire	63%	0.2	-0.2	-0.4	10%	105	104
State Funded Schools	64%	0	0	0	10%	105	104

% of pupils meeting expected standard in reading, writing and maths at the end of key stage 2 in 2018 - all pupils					
	Reading, writing & maths	Reading	Writing	Maths	Grammar, punctuation & spelling
Gloucestershire	63%	76%	77%	74%	77%
State Funded Schools	64%	75%	78%	75%	78%

Secondary Performance		75 Schools		Overall Performance					
	Number of pupils at end of key stage 4	Progress 8 score & decription	Entering Ebacc	Staying in Education or Entering employment (2016 leavers)	Grade 5 or above in English & Maths GCSEs	Attainment 8 Score	Ebacc average point score	Grade 4 or above in English & Maths GCSE	at least 1 qualification
Gloucestershire	6006	0.02	34.70%	95%	47.30%	49.6	4.34	69.10%	98.10%
State Funded Schools	523636	-0.02	38.40%	94%	43.30%	46.5	4.04	64.20%	97.70%

Post 16 Performance		56 Schools or Colleges			Overall Performance	
	Number of students with an A level exam entry	Average Grade	Average Point Score	Students completing their main study programme	Achieving AAB or higher in at least 2 facilitating subjects	Grade and points for a student's best 3 A levels
Gloucestershire	4017	C+	32.93	93.40%	15.20%	C+
State Funded Schools	263436	C+	32.12	92.50%	13.70%	C+

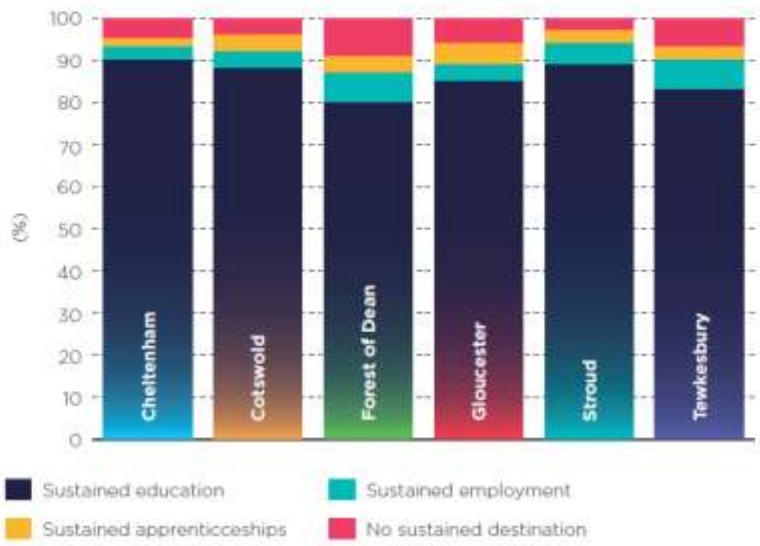
Aprenticeships				
	Level 3 No. of Students	Level 3 Achivement Rate	Level 2	Level 2 Achievement Rate
Gloucestershire	160	80.75%	170	88.40%
State Funded Schools	35690	72.50%	67490	68%

According to data published by Public Health England, young people in Gloucestershire and in the six districts perform either better or statistically similar to England in terms of their academic achievement, measured by their average Attainment 8 score at the age of 15 or 16. However, as we see across this report, there is inequality within this broad indicator. The Social Mobility Index shows that Gloucester City ranks as 311th out of 324 local authorities for the average Attainment 8 score for young people who are eligible for free school meals (used to represent socio-economic disadvantage). So young people in Gloucester who are more deprived are not achieving grades as high as those living in deprivation elsewhere in England. The index also shows that the young people eligible for free school meals at age 15 are less likely to go on to enter higher education by the age of 19 than those in other parts of England, with Gloucestershire ranked 275th in the country.

% of Student Destinations after Key Stage 5 (state-funded mainstream Schools and Colleges)
Year 2016/17 destinations for the 2015/16 cohort[82]

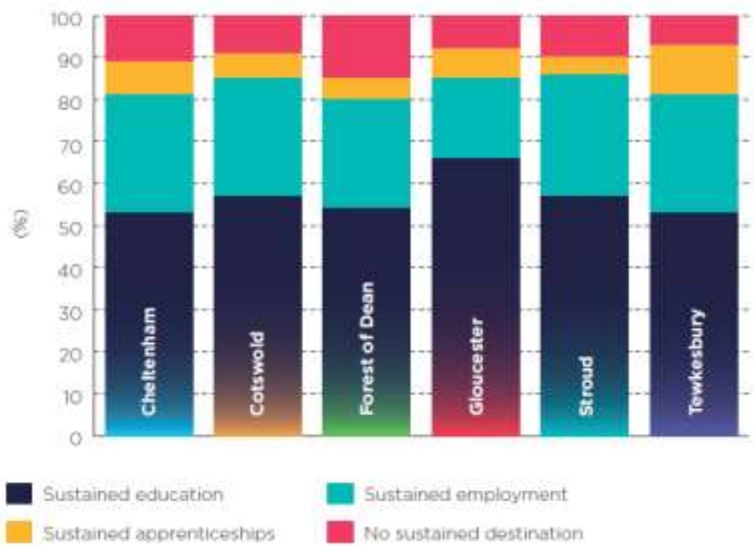
location	% of Students Any Sustained Education or Employment Destination	% of Students Any Sustained Education Destination	% of Students Sustained Employment Destination	% of Students Sustained Apprenticeship
Cheltenham	89%	53%	28%	8%
Cotswold	92%	58%	28%	6%
Forest of Dean	85%	54%	26%	5%
Gloucester	92%	66%	19%	7%
Stroud	91%	54%	31%	6%
Tewkesbury	93%	53%	28%	12%

Destination of Key Stage 4 Students by District, 2017



For Key Stage 4 (GCSE or equivalent) qualification students the vast majority in every district proceed to sustained further education, following the national trend. The Forest of Dean has the lowest rate of students going into full time education, at just below 80%, while Cheltenham has the highest rate, at just below 90%. Most school leavers at this stage start apprenticeships or full-time work, although nearly 10% of students in the Forest of Dean have no sustained destination.

Destination of Key Stage 5 Students by district, 2017

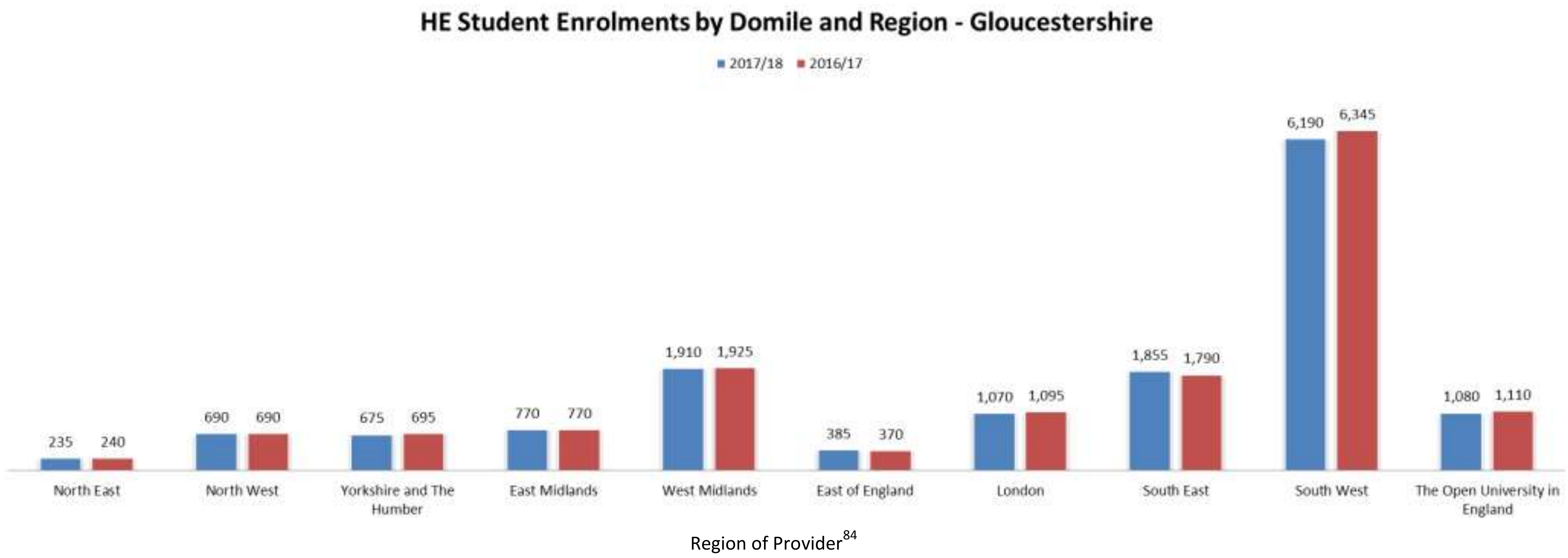


For Key Stage 5 (A-Level or equivalent) students, Over 50% of those who leave school after Key Stage 5 in all districts proceed to further sustained education, with most of those students going on to further education. Of those that do not go into education, a large proportion go into sustained employment, with a small number starting an apprenticeship. Again, the Forest of Dean has the greatest proportion of school leavers (around 15%) who have no sustained destination.

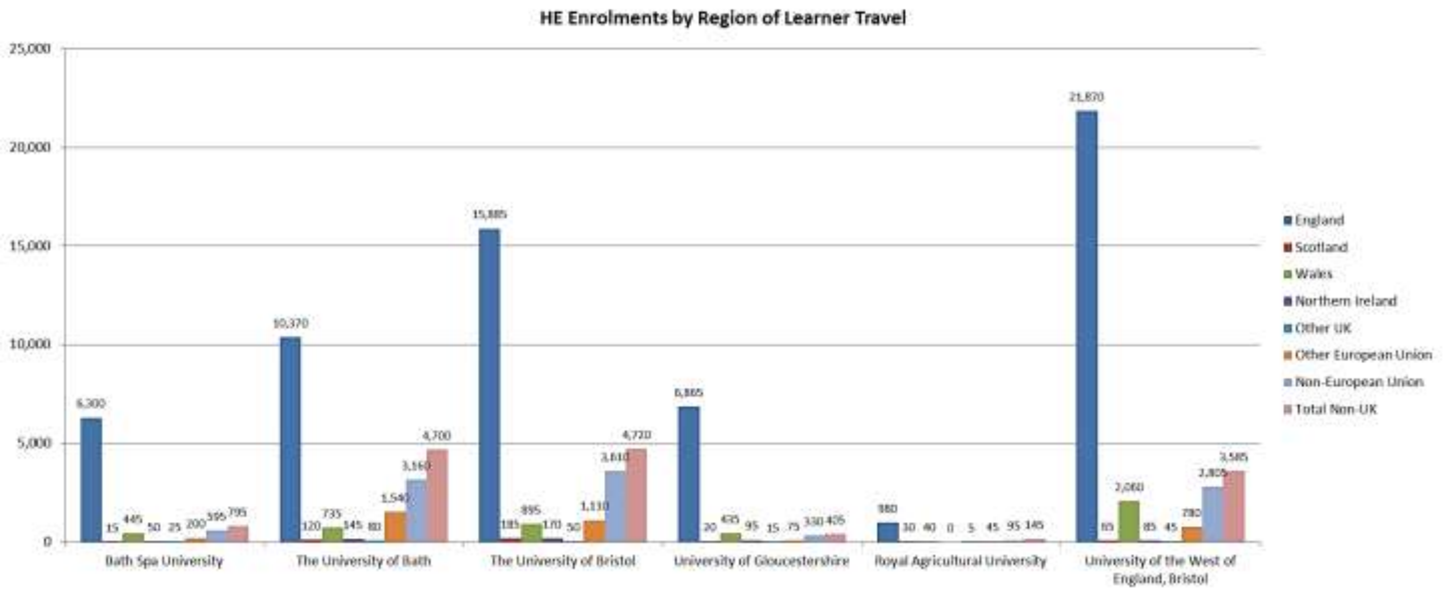
82 Longitudinal Education Outcomes Dataset

Higher Education

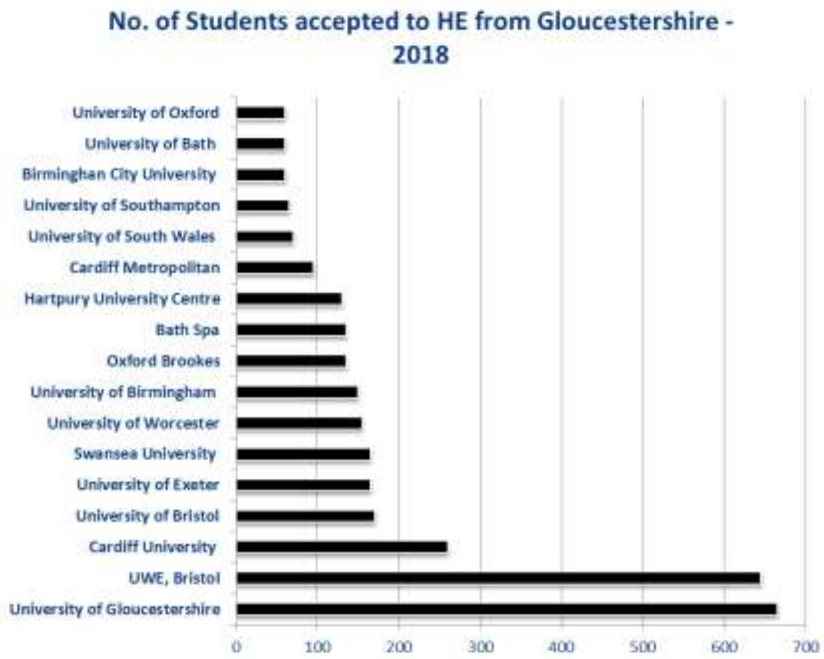
	Application rate[83]	Entry rate
The Cotswolds	46.8	39.9
Tewkesbury	44.7	38.6
Cheltenham	42.6	37
Stroud	38.1	32.9
Forest of Dean	36	30.8
Gloucester	31.1	25.5



[83] UCAS
[84] HESA



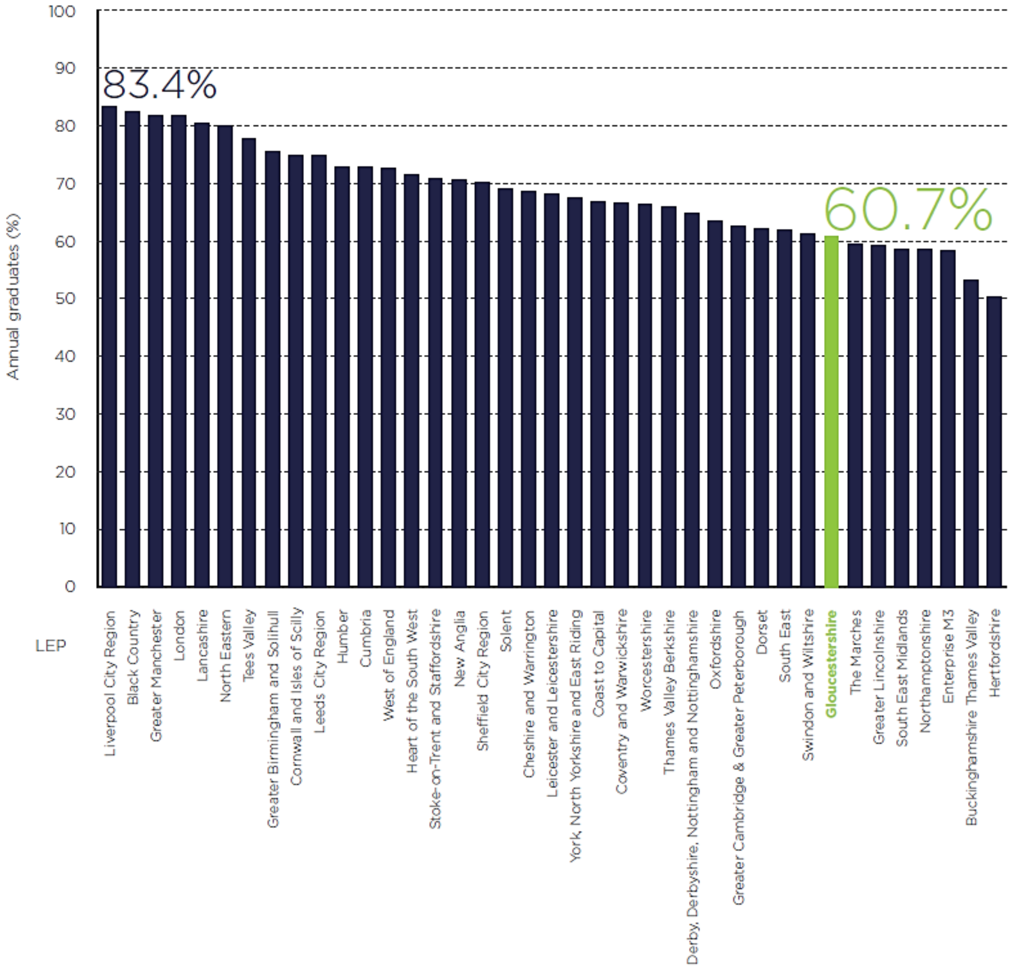
(2017)



Learner Destinations:

The South West has a competitive higher education learner market with many universities within a 90 minute travel time radius.

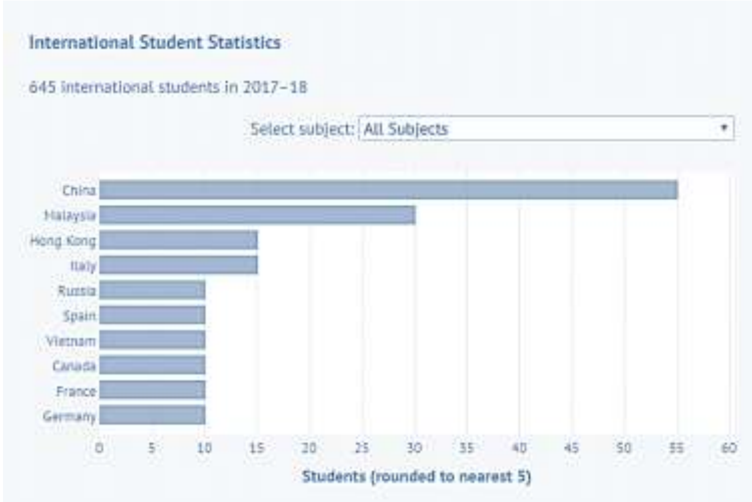
- Birmingham is 40-45 minutes direct from Cheltenham;
- Cardiff is 1 hour 5 minutes from Gloucester; and
- Bristol is 52-80 minutes (direct/with change) from Gloucester, or 40-65 minutes from Cheltenham as trains run more directly.
- Stroud to Swindon is 30 minutes direct; but Stroud to Bristol is 1 hour 30 minutes+.
- Cam & Dursley is just 38 minutes to Bristol.
- Moreton-in-marsh connects to Oxford in 26 minutes, or northwest to Worcester in 45 minutes.



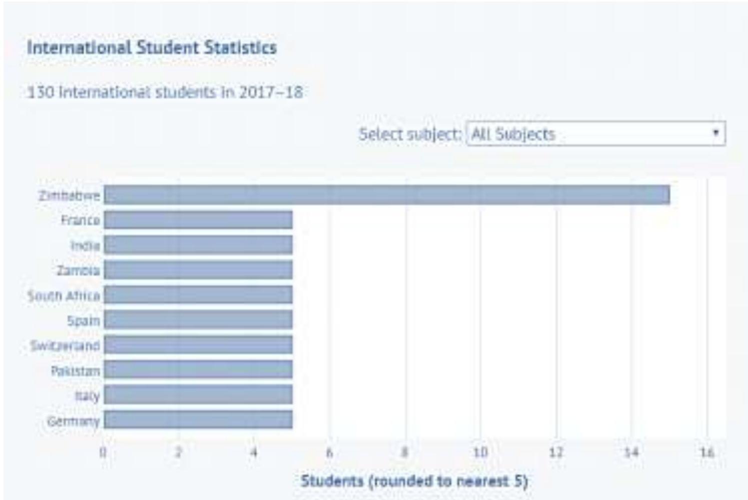
Retention of Talent Six Months after Graduation, 2013/13

Gloucestershire shows a retention rate of 60.7% – 32nd of all LEPs. This shows that graduates are more likely to leave Gloucestershire within six months of graduating than they are in most other areas, including all neighbouring LEP areas. The retention rate is inherently limited to showing graduates leaving, not moving, to an area. However, it is an important factor in understanding whether graduates see Gloucestershire as a good place to live and are able to find suitable work. Retention tends to be much higher in urban areas with labour market opportunities at scale. It should be noted that this is a snapshot based on experimental data compiled by government in 2012/2013.

University of Gloucestershire:



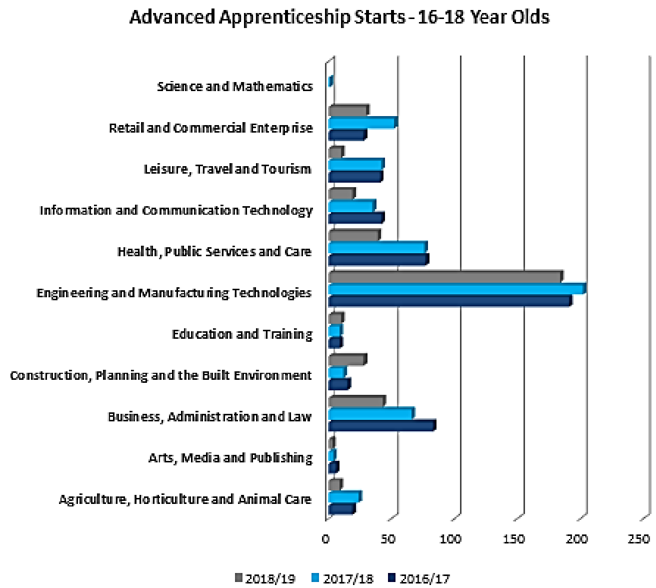
Royal Agricultural University

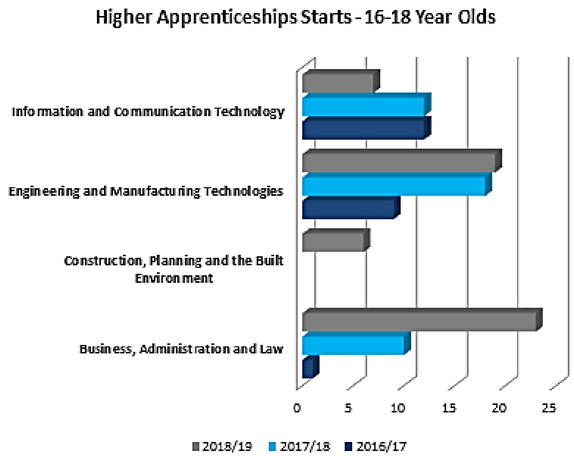


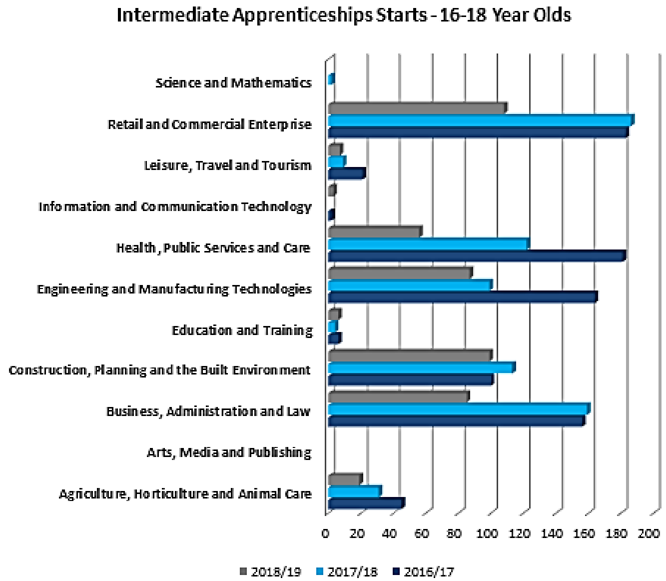
Graduation Source: Gfirst LIS Five Foundations of productivity

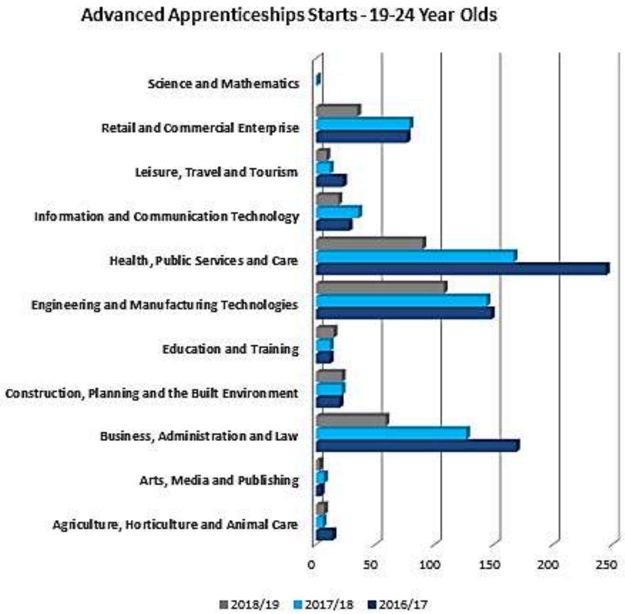
International Student Source: https://www.thecompleteuniversityguide.co.uk/universities/

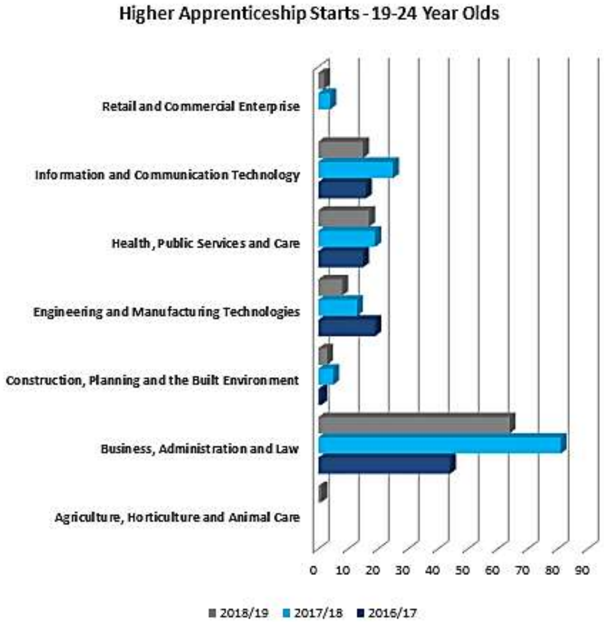
Apprenticeship Starts

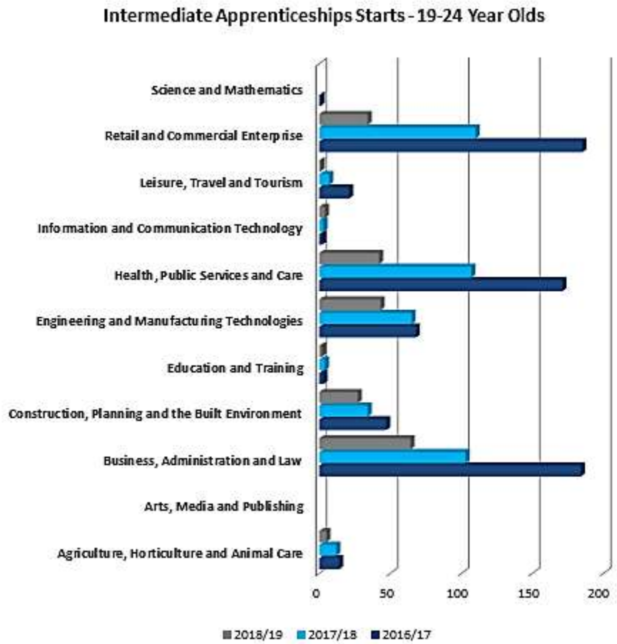


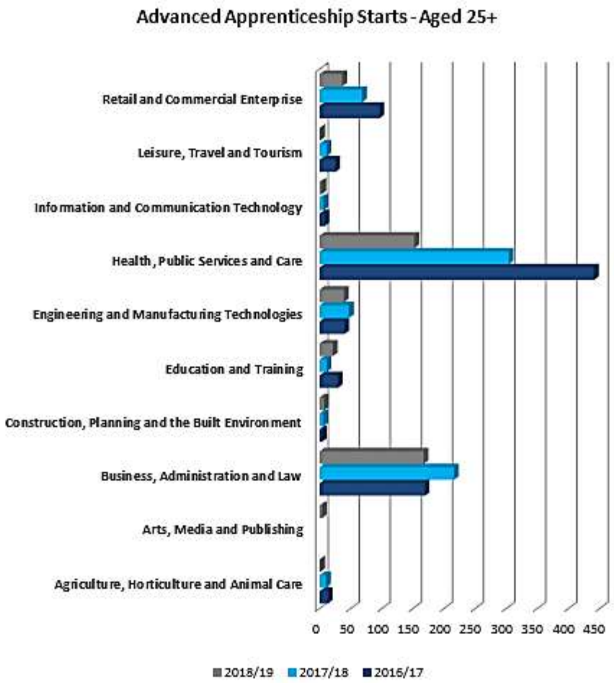


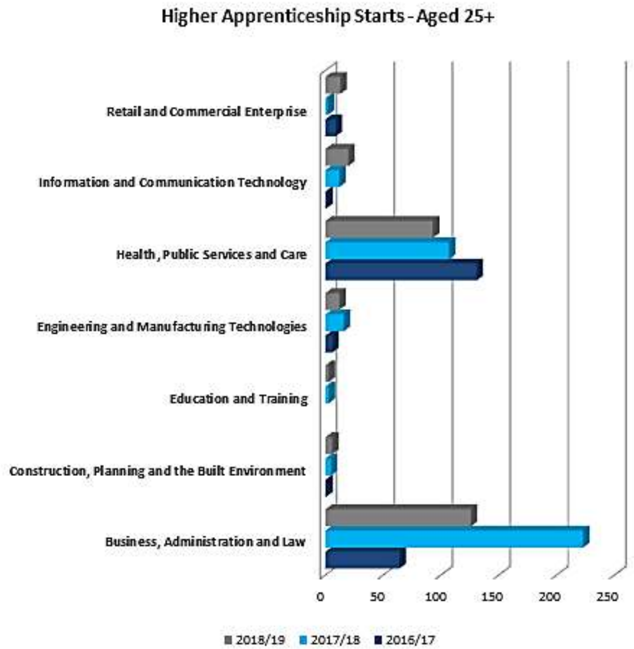


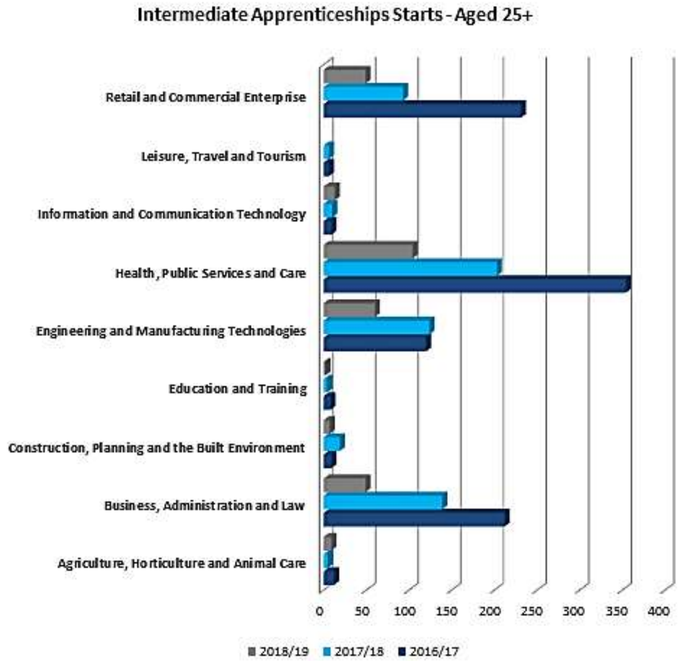


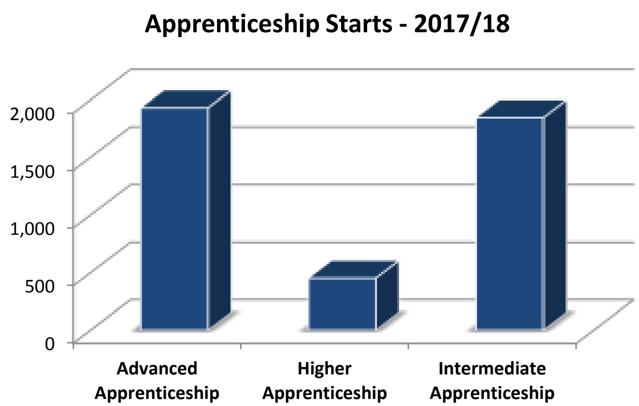


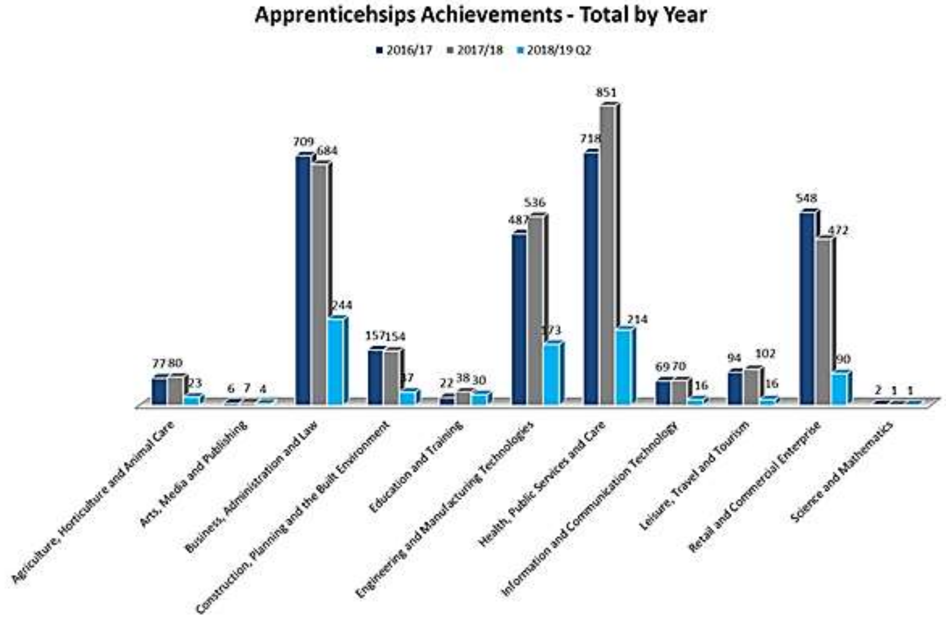


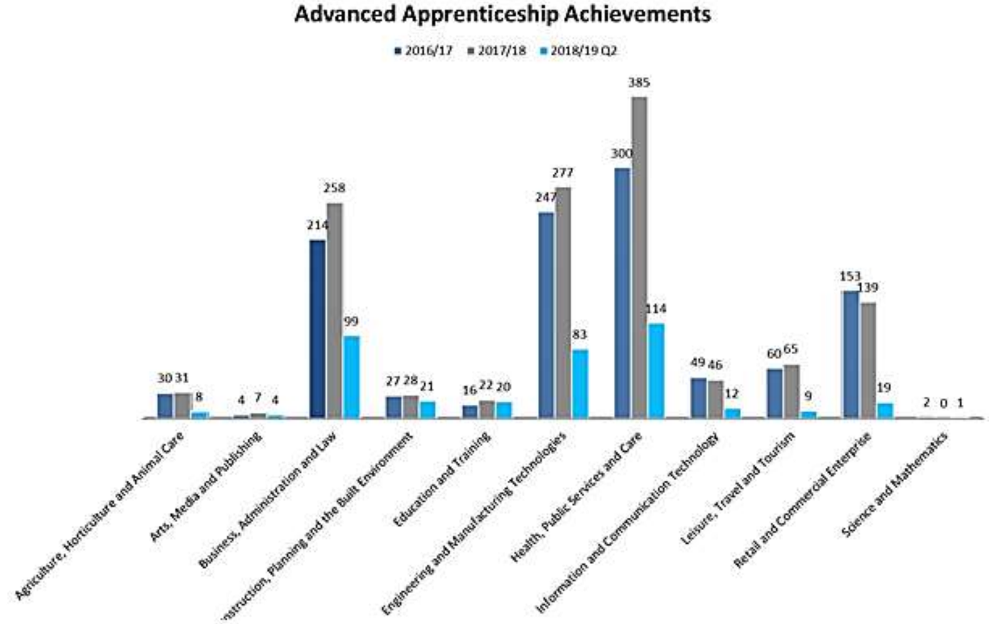

Advanced Apprenticeship Starts - Aged 25+
Retail and Commercial Enterprise
Leisure, Travel and Tourism
Information and Communication Technology
Health, Public Services and Care
Engineering and Manufacturing Technologies
Education and Training
Construction, Planning and the Built Environment
Business, Administration and Law
Arts, Media and Publishing
Agriculture, Horticulture and Animal Care
0 50 100 150 200 250 300 350 400 450
2018/19 2017/18 2016/17


Higher Apprenticeship Starts - Aged 25+
Retail and Commercial Enterprise
Information and Communication Technology
Health, Public Services and Care
Engineering and Manufacturing Technologies
Education and Training
Construction, Planning and the Built Environment
Business, Administration and Law
0 50 100 150 200 250
2018/19 2017/18 2016/17


Intermediate Apprenticeships Starts - Aged 25+
Retail and Commercial Enterprise
Leisure, Travel and Tourism
Information and Communication Technology
Health, Public Services and Care
Engineering and Manufacturing Technologies
Education and Training
Construction, Planning and the Built Environment
Business, Administration and Law
Agriculture, Horticulture and Animal Care
0 50 100 150 200 250 300 350 400
2018/19 2017/18 2016/17


Apprenticeship Starts - 2017/18
2,000
1,500
1,000
500
0
Advanced Apprenticeship
Higher Apprenticeship
Intermediate Apprenticeship


Apprenticehsips Achievements - Total by Year
2016/17
2017/18
2018/19 Q2
77 80 23
6 7 4
709 684 244
157 154 37
22 38 30
487 536 173
718 851 214
69 70 16
94 102 16
548 472 90
2 1 1
Agriculture, Horticulture and Animal Care
Arts, Media and Publishing
Business, Administration and Law
Construction, Planning and the Built Environment
Education and Training
Engineering and Manufacturing Technologies
Health, Public Services and Care
Information and Communication Technology
Leisure, Travel and Tourism
Retail and Commercial Enterprise
Science and Mathematics


Advanced Apprenticeship Achievements
2016/17
2017/18
2018/19 Q2
30 31 8
4 7 4
214 258 99
27 28 21
16 22 20
247 277 83
300 385 114
49 46 12
60 65 9
153 139 19
2 0 1
Agriculture, Horticulture and Animal Care
Arts, Media and Publishing
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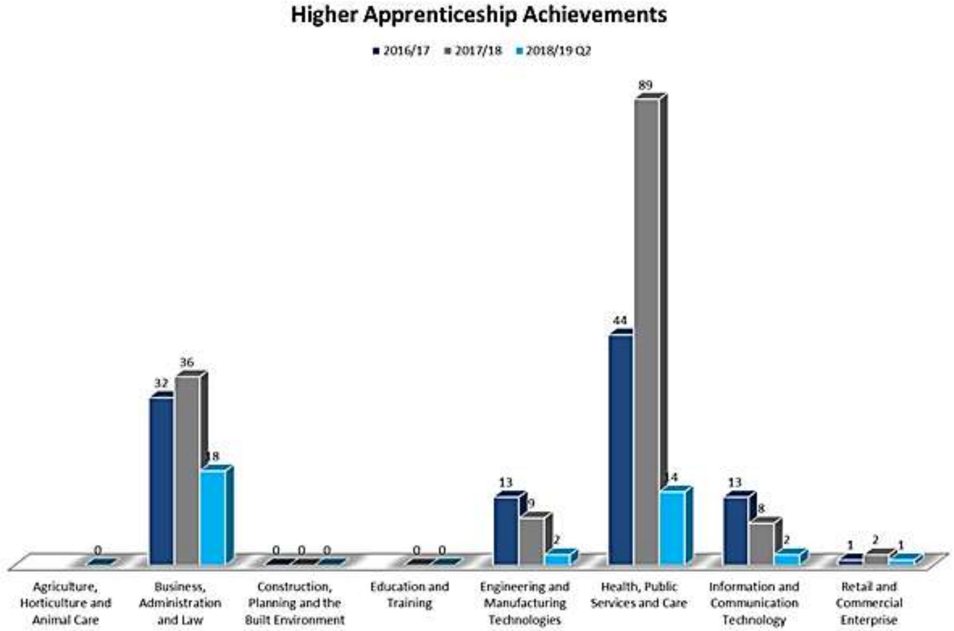
Science and Mathematics


Higher Apprenticeship Achievements
2016/17
2017/18
2018/19 Q2
0
32 36 18
0 0 0
0 0
13 9 2
44 89 14
13 8 2
1 2 1
Agriculture, Horticulture and Animal Care
Business, Administration and Law
Construction, Planning and the Built Environment
Education and Training
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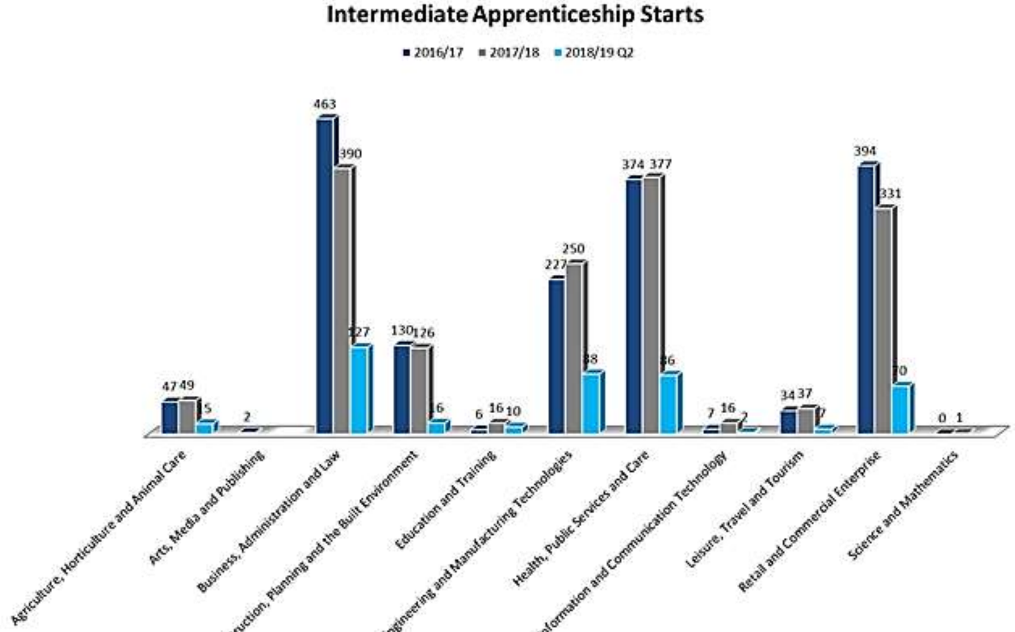
Health, Public Services and Care
Information and Communication Technology
Retail and Commercial Enterprise


Intermediate Apprenticeship Starts
2016/17
2017/18
2018/19 Q2
47 49 15
2
463 390 127
130 126 16
6 16 10
227 250 88
374 377 86
7 16 2
34 37 7
394 331 70
0 1
Agriculture, Horticulture and Animal Care
Arts, Media and Publishing
Business, Administration and Law
Construction, Planning and the Built Environment
Education and Training
Engineering and Manufacturing Technologies
Health, Public Services and Care
Information and Communication Technology
Leisure, Travel and Tourism
Retail and Commercial Enterprise
Science and Mathematics

Starts	2016/17	2017/18	Change 16/17 to 17/18	% of Change
Advanced	**2,077**	**1,815**	-262	-13%
Under 16	1		-1	-100%
16-18	511	523	12	2%
19-24	740	613	-127	-17%
25+	825	679	-146	-18%
Higher	**329**	**555**	226	69%
16-18	22	40	18	82%
19-24	95	147	52	55%
25+	212	368	156	74%
Intermediate	**2,515**	**1,773**	-742	-30%
16-18	858	725	-133	-16%
19-24	696	445	-251	-36%
25+	961	603	-358	-37%
Grand Total	**4,921**	**4,143**	**-778**	**-16%**

Apprenticeship Starts In 2017/18:

•555 higher apprenticeships.

•1815 advanced apprenticeships.

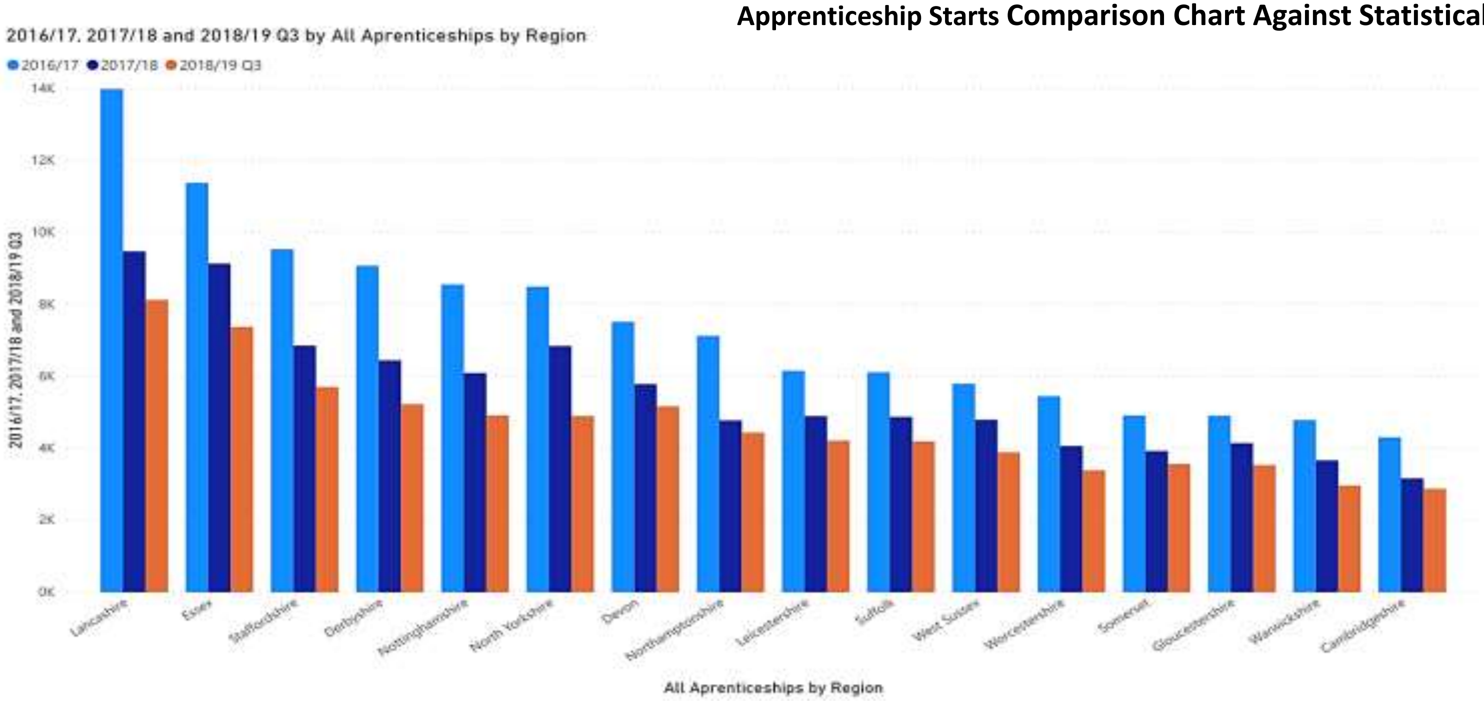
•1773 intermediate starts.

Higher apprenticeships require the completion of an advanced or equivalent framework and take multiple years to complete.

Although there has been a dip in apprenticeship starts, quarter 3 figures from 2018/19 show that total starts should surpass those of the previous year.

Below:

Apprenticeship Starts Comparison Chart Against Statistical Neighbours



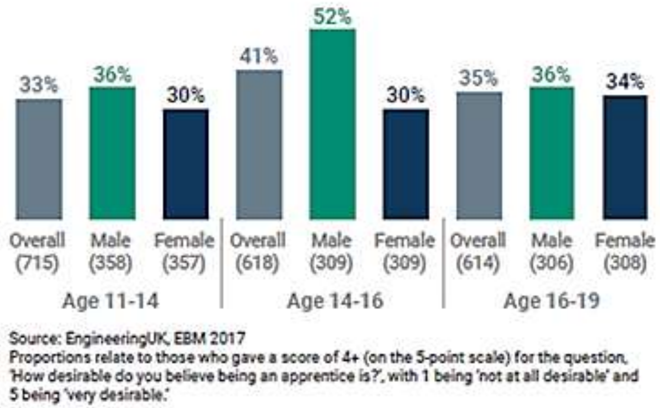
Apprenticeships in Social Care:

Development of an Integrated Care System Apprenticeship “hub” ensuring a more coordinated and streamlined approach to apprenticeship provision for all 5 health and social care organisations. The aim will be to maximize the opportunities for apprenticeship provision and ensure the apprenticeship levy is maximized in the County across all Trusts and Partners - thereby supporting a more sustainable workforce to grow our own professional teams. The work involved in developing each new apprenticeship and standard is significant, and as each organisation does this for themselves, there is duplication of effort, less capacity for innovation, smaller numbers of apprenticeships taken up and a potential underspend of levies. Introducing a Hub will allow for more collaboration and development countywide.

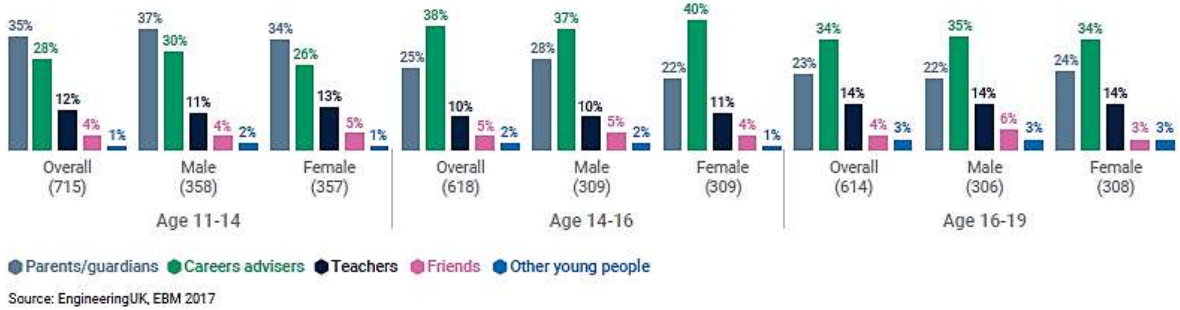
Social Work Apprenticeships:

Starting in 2020, we aim to have 4 Apprentices each year in Gloucestershire County Council. These will initially be sourced from our current non qualified but experienced Social Care Assessor staff, providing them with the opportunity for professional career development, and the council with a group of employees who are firmly based in Gloucestershire for family reasons and are more likely to remain once qualified. At present the ICS partners work to jointly procure training providers for Level 3 & 5 Management, Level 5 Assistant Practitioner, Level 4 Data Analyst (rotational apprenticeship) and Level 2 & 3 Health Care Assistant apprenticeships.[85]

Careers Advice:
Proportion of 11 to 19 Year olds who think being an apprentice is desirable (2017) – Nationwide (UK)



Careers Advice:
Top 5 Sources of careers advice that pupils aged 11 to 19 would act on (2017) – Nationwide (UK)



85 One Gloucestershire – Workforce Overview

Top 30 Providers of Advanced Apprenticeships (by Total)

	2016/17, Final	2017/18, Final	2018/19, Quarter 2	Grand Total
GLOUCESTERSHIRE COLLEGE	196	270	261	727
LIFETIME TRAINING GROUP LIMITED	194	148	77	419
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	95	133	86	314
GLOUCESTERSHIRE ENGINEERING TRAINING LIMITED	89	90	88	267
LEARNDIRECT LIMITED	237	5		242
ASPIRATION TRAINING LIMITED	82	50	31	163
HIT TRAINING LTD	67	52	41	160
BABCOCK TRAINING LIMITED	65	52	23	140
MARR CORPORATION LIMITED	44	27	10	81
CIRENCESTER COLLEGE	24	33	18	75
ASPIRE ACHIEVE ADVANCE LIMITED	51	12	1	64
HEART OF WORCESTERSHIRE COLLEGE	29	22	12	63
EQL SOLUTIONS LIMITED	62	0		62
QA LIMITED	19	22	20	61
CLARKSON EVANS TRAINING LIMITED	30	27	3	60
INTERSERVE LEARNING & EMPLOYMENT (SERVICES) LIMITED	23	25	7	55
CHESTERFIELD COLLEGE	2	29	22	53
CITB	19	19	12	50
GLOUCESTERSHIRE COUNTY COUNCIL	12	21	14	47
SUMMERHOUSE EQUESTRIAN AND TRAINING CENTRE LLP	26	14	5	45
REMIT GROUP LIMITED	16	17	10	43
QUBE QUALIFICATIONS AND DEVELOPMENT LIMITED	18	18	5	41
JTL	16	9	15	40
UNITED COLLEGES GROUP	38	2	0	40
THE INTRAINING GROUP LIMITED	34	5	0	39
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	17	3	18	38
GLOUCESTERSHIRE ENTERPRISE LIMITED		27	10	37
PARAGON EDUCATION & SKILLS LIMITED	23	11	2	36
PROSPECT TRAINING SERVICES (GLOUCESTER) LIMITED	15	16	4	35
KAPLAN FINANCIAL LIMITED	13	17	4	34

Advanced Apprenticeships	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Grand Total
GLOUCESTERSHIRE COLLEGE	127	34	140	219	58	149	727
LIFETIME TRAINING GROUP LIMITED	65	60	38	111	97	48	419
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	36	25	6	65	160	22	314
GLOUCESTERSHIRE ENGINEERING TRAINING LIMITED	40	5	43	74	54	51	267
LEARNDIRECT LIMITED	42	9	57	62	39	33	242
ASPIRATION TRAINING LIMITED	21	5	35	72	11	19	163
HIT TRAINING LTD	23	29	15	52	30	11	160
BABCOCK TRAINING LIMITED	18	9	12	64	23	14	140
MARR CORPORATION LIMITED	12	12	14	11	28	4	81
CIRENCESTER COLLEGE	10	36	3	6	14	6	75
ASPIRE ACHIEVE ADVANCE LIMITED	6	2	11	22	10	13	64
HEART OF WORCESTERSHIRE COLLEGE	5	6	11	20	8	13	63
EQL SOLUTIONS LIMITED	13		14	23	5	7	62
QA LIMITED	9	7	4	24	8	9	61
CLARKSON EVANS TRAINING LIMITED	9	2	4	23	10	12	60
INTERSERVE LEARNING & EMPLOYMENT (SERVICES) LIMITED	9	10	1	17	2	16	55
CHESTERFIELD COLLEGE	6	1	11	19	9	7	53
CITB	7	7	9	13	7	7	50
GLOUCESTERSHIRE COUNTY COUNCIL	2		6	23	3	13	47
SUMMERHOUSE EQUESTRIAN AND TRAINING CENTRE LLP	2	3	3	11	15	11	45
REMIT GROUP LIMITED	7	8	6	10	8	4	43
QUBE QUALIFICATIONS AND DEVELOPMENT LIMITED	17	8	5	5	5	1	41
JTL	3	3	11	12	3	8	40
UNITED COLLEGES GROUP	18		8	8	2	4	40
THE INTRAINING GROUP LIMITED	5	1	6	18	7	2	39
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	6	2	14	6	6	4	38
GLOUCESTERSHIRE ENTERPRISE LIMITED	5	1	4	13	8	6	37
PARAGON EDUCATION & SKILLS LIMITED	5	2	10	7	3	9	36
PROSPECT TRAINING SERVICES (GLOUCESTER) LIMITED	5		4	15	6	5	35
KAPLAN FINANCIAL LIMITED	4	2	1	15	4	8	34

Top 30 Providers of Intermediate Apprenticeships (by Total)

	2016/17, Final	2017/18, Final	2018/19, Quarter 2	Grand Total
GLOUCESTERSHIRE COLLEGE	322	310	297	929
LIFETIME TRAINING GROUP LIMITED	335	246	106	687
HIT TRAINING LTD	146	71	47	264
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	97	69	45	211
BABCOCK TRAINING LIMITED	97	43	21	161
ASPIRATION TRAINING LIMITED	82	48	29	159
LEARNDIRECT LIMITED	142	1		143
CITB	59	55	5	119
EASTLEIGH COLLEGE	75	21	1	97
GLOUCESTERSHIRE COUNTY COUNCIL	27	46	9	82
SUMMERHOUSE EQUESTRIAN AND TRAINING CENTRE LLP	64	11	2	77
LEAN EDUCATION AND DEVELOPMENT LIMITED	11	40	20	71
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	48	17	3	68
MARR CORPORATION LIMITED	34	24	9	67
REMIT GROUP LIMITED	36	21	10	67
UK TRAINING & DEVELOPMENT LIMITED	31	20	14	65
LEARNDIRECT APPRENTICESHIPS LIMITED	60			60
PEOPLEPLUS GROUP LIMITED	1	26	32	59
GLP TRAINING LTD		33	17	50
QUBE QUALIFICATIONS AND DEVELOPMENT LIMITED	24	25	1	50
CIRENCESTER COLLEGE	12	23	14	49
PROGRESS TO EXCELLENCE LTD	2	39	5	46
WARWICKSHIRE COLLEGE	23	12	9	44
THE INTRAINING GROUP LIMITED	38	6	0	44
PROSPECT TRAINING SERVICES (GLOUCESTER) LIMITED	20	18	5	43
SWINDON COLLEGE	22	13	7	42
HEART OF WORCESTERSHIRE COLLEGE	22	8	11	41
PARAGON EDUCATION & SKILLS LIMITED	14	18	7	39
BRITISH TELECOMMUNICATIONS PUBLIC LIMITED COMPANY	5	13	18	36
SMART TRAINING AND RECRUITMENT LIMITED	23	7	2	32

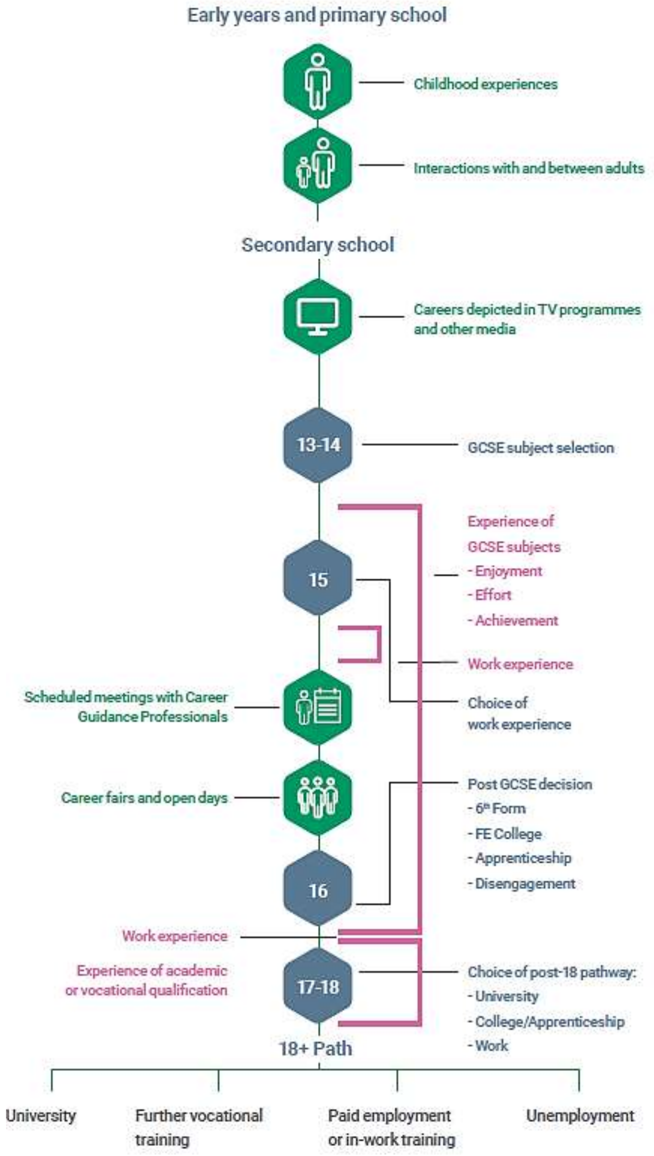
Intermediate	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Grand Total
GLOUCESTERSHIRE COLLEGE	172	21	233	253	93	157	929
LIFETIME TRAINING GROUP LIMITED	112	82	64	185	143	101	687
HIT TRAINING LTD	64	34	20	58	66	22	264
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	10	20	4	25	140	12	211
BABCOCK TRAINING LIMITED	24	14	27	56	26	14	161
ASPIRATION TRAINING LIMITED	19	1	55	58	5	21	159
LEARNDIRECT LIMITED	16	9	49	45	15	9	143
CITB	27	7	19	37	13	16	119
EASTLEIGH COLLEGE	1	14	9	23	45	5	97
GLOUCESTERSHIRE COUNTY COUNCIL	11	1	15	43	3	9	82
SUMMERHOUSE EQUESTRIAN AND TRAINING CENTRE LLP	13	1	8	30	13	12	77
LEAN EDUCATION AND DEVELOPMENT LIMITED	20	3	8	17	10	13	71
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	11	3	13	24	9	8	68
MARR CORPORATION LIMITED	3	5	22	15	15	7	67
REMIT GROUP LIMITED	9	2	6	19	15	16	67
UK TRAINING & DEVELOPMENT LIMITED	11	1	2	26	15	10	65
LEARNDIRECT APPRENTICESHIPS LIMITED	14	12		14	10	10	60
PEOPLEPLUS GROUP LIMITED	9	6	4	14	16	10	59
GLP TRAINING LTD	18		3	14	5	10	50
QUBE QUALIFICATIONS AND DEVELOPMENT LIMITED	21	19	2	3	5	0	50
CIRENCESTER COLLEGE	4	32		3	6	4	49
PROGRESS TO EXCELLENCE LTD	11	1	3	13	11	7	46
THE INTRAINING GROUP LIMITED	5	2	5	18	7	7	44
	7	14	7	2	3	11	44
PROSPECT TRAINING SERVICES (GLOUCESTER) LIMITED	6	1	3	25	1	7	43
SWINDON COLLEGE		35	1	1	5		42
HEART OF WORCESTERSHIRE COLLEGE	3	0	9	9	4	16	41
PARAGON EDUCATION & SKILLS LIMITED	5	12	0	6		16	39
BRITISH TELECOMMUNICATIONS PUBLIC LIMITED COMPANY	3	2	10	13	1	7	36
SMART TRAINING AND RECRUITMENT LIMITED	1	3		23	4	1	32

Top 30 Providers of Higher Apprenticeships (by Total)

	2016/17, Final	2017/18, Final	2018/19, Quarter 2	Grand Total
GLOUCESTERSHIRE COLLEGE	28	42	22	92
UNIVERSITY OF GLOUCESTERSHIRE	5	12	62	79
LIFETIME TRAINING GROUP LIMITED	32	26	12	70
GLOUCESTERSHIRE ENTERPRISE LIMITED	7	33	27	67
KAPLAN FINANCIAL LIMITED	5	26	29	60
QA LIMITED	16	18	12	46
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	11	17	13	41
GLOUCESTERSHIRE COUNTY COUNCIL		40	0	40
ASPIRATION TRAINING LIMITED	26	8	3	37
THE UNIVERSITY OF WARWICK		23	11	34
HIT TRAINING LTD	9	7	10	26
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	2	4	17	23
ASPIRE ACHIEVE ADVANCE LIMITED	6	15	1	22
MARR CORPORATION LIMITED	12	6	4	22
FIRST INTUITION BRISTOL LIMITED		3	19	22
SOUTH WEST ASSOCIATION OF TRAINING PROVIDERS LIMITED	10	9	2	21
CHESTERFIELD COLLEGE		13	6	19
HEART OF WORCESTERSHIRE COLLEGE	3	13	3	19
COVENTRY UNIVERSITY	9	10	0	19
EQL SOLUTIONS LIMITED	19	0		19
BCTG LIMITED	10	2	4	16
ACCESS SKILLS LTD	5	7	3	15
BPP PROFESSIONAL EDUCATION LIMITED		6	8	14
CORNDEL LIMITED		3	10	13
BABINGTON BUSINESS COLLEGE LIMITED	1	8	3	12
BABCOCK TRAINING LIMITED	2	5	5	12
UNIVERSITY OF EXETER	3	5	4	12
THE DEVELOPMENT MANAGER LTD		3	9	12
PROGRESS TO EXCELLENCE LTD	0	8	3	11
UNIVERSITY OF THE WEST OF ENGLAND, BRISTOL		4	6	10

Higher	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Grand Total
GLOUCESTERSHIRE COLLEGE	13	5	11	23	19	21	92
UNIVERSITY OF GLOUCESTERSHIRE	16	5	8	22	15	13	79
LIFETIME TRAINING GROUP LIMITED	9	8	7	21	18	7	70
GLOUCESTERSHIRE ENTERPRISE LIMITED	12	8	7	19	12	9	67
KAPLAN FINANCIAL LIMITED	21	3	7	9	7	13	60
QA LIMITED	8	7	4	8	9	10	46
SOUTH GLOUCESTERSHIRE AND STROUD COLLEGE	4	2	3	8	22	2	41
GLOUCESTERSHIRE COUNTY COUNCIL	6		3	15	7	9	40
ASPIRATION TRAINING LIMITED	4	0	8	16	2	7	37
THE UNIVERSITY OF WARWICK	8	13		2	2	9	34
HIT TRAINING LTD	7	1	3	8	4	3	26
WESTON COLLEGE OF FURTHER AND HIGHER EDUCATION	4	4	3	3	7	2	23
ASPIRE ACHIEVE ADVANCE LIMITED		2	3	11	3	3	22
FIRST INTUITION BRISTOL LIMITED	3	2	7	4	4	2	22
MARR CORPORATION LIMITED	2	3	2	7	5	3	22
SOUTH WEST ASSOCIATION OF TRAINING PROVIDERS LIMITED		2	4	7	6	2	21
CHESTERFIELD COLLEGE		1	10	4	3	1	19
COVENTRY UNIVERSITY	8	1	3	6		1	19
EQL SOLUTIONS LIMITED		1	6	3	3	6	19
HEART OF WORCESTERSHIRE COLLEGE		1	3	5	2	8	19
BCTG LIMITED	2	0	6	6	0	2	16
ACCESS SKILLS LTD	3			9	1	2	15
BPP PROFESSIONAL EDUCATION LIMITED	3	3		3	3	2	14
CORNDEL LIMITED	4	2	2	3	1	1	13
BABCOCK TRAINING LIMITED	1	3	1	1	4	2	12
BABINGTON BUSINESS COLLEGE LIMITED			2	6	1	3	12
THE DEVELOPMENT MANAGER LTD	1		1	5	2	3	12
UNIVERSITY OF EXETER	2	1		1	8		12
PROGRESS TO EXCELLENCE LTD		4	2	1	2	2	11
EASTLEIGH COLLEGE	1		5	4	0	0	10

Careers Support:
Moments of Choice Model and Factors in Decision-Making by Young People



Hard choice prompts: moments where a neccesary decision with immediate consequence forces the consideration of career options. These occur at set times, so approximate age is noted in the circle.

Feedback points: the resulting experience of a decision, which can either reaffirm a student choice or lead them to reconsider their career direction. These are represented with a range over which students can develop a view as to their decision.

Idea-forming events: can be planned or unplanned, and plant the seed for a student to consider a particular job, career or study pathway. These can happen at any moment, and with varying frequency. They are placed for illustrated purposes only.

Source: Careers & Enterprise Company, 2016

How long will young people stay in Gloucestershire?

Overall 66% of young people plan to leave Gloucestershire within 5 years. 13% plan to stay forever.

Young people aged 14-19	Young people aged 20-25
70% of young people plan to leave Gloucestershire within 5 years.	59% of young people plan to leave Gloucestershire within 5 years.
37% of young people aged 14-19 said they would stay in Gloucestershire between 2-5 years.	26% of young people aged 20-25 said they would stay in Gloucestershire between 2-5 years.
55% of males said they planned to stay in Gloucestershire between 2-10 years; compared to 57% of females.	39% of males said they planned to stay in Gloucestershire between 2-10 years; compared to 46% of females and 50% of transgender/ non binary/ gender fluid young people.
84% of young people with learning difficulties or disabilities said they planned to stay in Gloucestershire between 2-10 years.	44% of young people with learning difficulties or disabilities said they planned to stay in Gloucestershire between 2-10 years. 31% said they would stay forever.

Why do young people want to leave Gloucestershire?

Young people want to go to university (46%) relocate for a job (39%) or move to be with family (21%).

Young people aged 14-19	Young people aged 20-25
51% of young people aged 14-19 said they wanted to go to university or higher education and that would be the main reason they would leave Gloucestershire.	52% of young people aged 20-25 said they would leave Gloucestershire for a job, followed by leaving to be with family (31%).
47% of males said they would leave Gloucestershire to go to university, followed by a job (39%) and wanting to move to a city (20%).	49% of males said they would leave Gloucestershire for a job; followed by moving to be with family (23%) and wanting to move to the countryside (20%).
53% of females said they would leave Gloucestershire to go to university, followed by a job (34%) and moving to be with family (19%).	51% of females said they would leave Gloucestershire for a job; followed by moving to be with family (36%) and going to university (20%).
33% of young people with learning difficulties or disabilities said they would leave to go to university or for health reasons (33%).	33% of young people with learning difficulties or disabilities said they would leave for a job (56%) or to be with family (53%).

https://www.gfirstlep.com/downloads/2019/gfirst-lep-youth-survey-2019v2.pdf

T-Levels

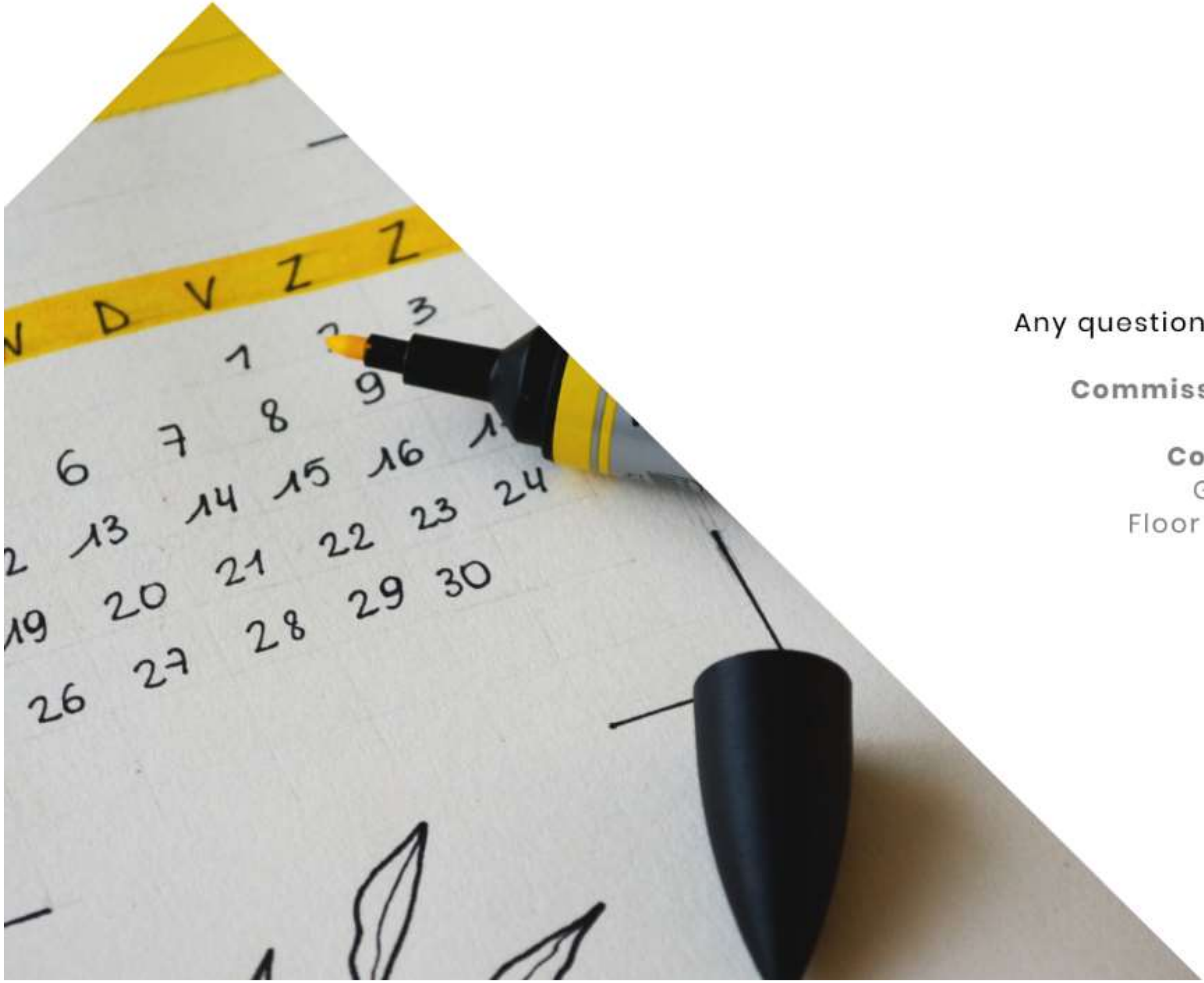
T-Levels are new courses coming in September 2020, which will follow GCSEs and will be equivalent to 3 A Levels. These 2-year courses have been developed in collaboration with employers and businesses so that the content meets the needs of industry and prepares students for work. T Levels will offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 315 hours (approximately 45 days). They will provide the knowledge and experience needed to open the door into skilled employment, further study or a higher apprenticeship. Students will be able to take a T Level in the following subject areas; Accountancy, Agriculture, land management and production, Animal care and management, Building services engineering, Catering, Craft and design, Cultural heritage and visitor attractions, Design, development and control, Design, surveying and planning, Digital business services, Digital production, design and development, Digital support and services, Education, Financial, Hair, beauty and aesthetics, Health, Healthcare science, Human resources, Legal, Maintenance, installation and repair, Management and administration, Manufacturing and process, Media, broadcast and production, Onsite construction, Science.

South West provision From 2020

		Confirmation of the course(s) they plan to deliver in 2020			
Name of provider	**Region name**	**Digital sector: Digital production, design and development T Level**	**Construction sector: Design, Surveying and Planning T Level**	**Education and Childcare sector: Education T Level**	
Bridgwater & Taunton College	South West	X	X	X	
Cirencester College	South West	X	X	X	
Exeter College	South West	X	X	X	
Strode College	South West	X		X	
Truro and Penwith College	South West	X	X	X	
Weston College	South West	X			

From 2021

		Routes providers intend to offer T Levels in from 2021			
Name of provider	**Region name**	**Digital route**	**Construction route**	**Education and Childcare route**	**Health and Science route**
Bath College	South West	X		X	X
Gloucestershire College	South West	X	X		X
New College Swindon	South West	X		X	X
Petroc	South West	X	X	X	X
South Devon College	South West	X	X	X	X
Yeovil College	South West	X		X	X



Feedback

Any questions or Feedback please contact:

Commissioning Skills and Employment
Adult Education
Communities and Infrastructure
Gloucestershire County Council
Floor 1, Block 5, West Wing, Shire Hall
Gloucester, GL1 2TG
01452 583860