We are Gloucestershire Devolution bid

4th September 2015

One boundary one vision

Review of Evidence October 2015

Introduction

The We are Gloucestershire devolution bid sets out our commitment to working together locally and with Government to accelerate economic growth and drive public sector reform. This is supported by a strong evidence base which is summarised here.

Partners in Gloucestershire have a long history of working together to develop a shared evidence base for decision making which, in turn, underpins a strong shared understanding of the needs and key trends affecting the local population. This document provides a high-level summary of the evidence that supports this devolution bid.

More detail can be found on our information and intelligence website: *Inform*Gloucestershire (www.gloucestershire.gov.uk/inform), in *Understanding Gloucestershire*, our Joint Strategic Needs Analysis document and in the Strategic Economic Plan and ESIF Strategy..

Gloucestershire context

Gloucestershire is the northernmost County in the South West of England. It shares borders with Wales, the West Midlands and the South East and has boundaries with eight other local authority areas: Monmouthshire, Herefordshire, Worcestershire, Warwickshire, Oxfordshire, Swindon and Wiltshire.
Nevertheless, in terms of providing employment for local people, it has high levels of self-containment, with 88% of working age residents also working in the county (a figure that has changed little over the past 15 years. The M5 has a significant impact on the county's economy and relationship to its neighbours. Gloucestershire is a net exporter of workers to Bristol and Swindon, and an important employer for workers from Worcestershire.
The county comprises six districts – Cheltenham Borough, Cotswold District, Forest of Dean District, Gloucester City, Stroud District and Tewkesbury Borough. The county contains two main urban centres – Gloucestershire and Cheltenham – together home to more than half of the county's population.
The rural areas have a number of vibrant market towns which act as hubs for local services and employment, but there are also significant areas of deeper rurality. Despite the self-containment at county level there are high levels of interdependency between the economies of the different districts within Gloucestershire. There is considerable local commuting, in particular, between the Forest of Dean District and Gloucester.

The geography of the county includes the flood plain of the River Severn, two Areas of Outstanding Natural Beauty (Wye Valley and The Cotswolds) and the Royal Forest of Dean, all of which provide natural physical constraints on development as well as contributing to the county's an attraction as a place to live.

Relative affluence with pockets of deprivation and rural sparsity

Generally, outcomes for local people are good across Gloucestershire. At county level, most indicators of health, wellbeing, education, employment and income are above the national average. However, a more granular view reveals significant inequalities. According to the latest Index of Multiple Deprivation (IMD2015),

Gloucestershire has thirteen neighborhoods amongst the most deprived in England, all located within Gloucester and Cheltenham. Outcomes in these areas are significantly worse than county or national averages.
By contrast, the rural nature of parts of the county also presents a challenge in terms of accessibility. According to IMD2015, there are 33 areas of the county that rank amongst the 10% worst nationally for barriers to housing and services. This includes areas in all districts except Cheltenham.

A population that is growing and ageing

Gloucestershire has a population of 611,000. The key challenge facing us is the structure of that population and how it is predicted to change. The number of people aged 65 and over in the county has been growing at an average of 2,100 people per year between 2003 and 2013. This age group is projected to grow by 35.4% between 2012 and 2025 (compared to an average of 30.4% for England as a whole), but the most significant challenge is in the number of over 85s, which is projected to increase by 55.7% over the same period. Growth amongst children and young people is expected to be more modest at 7.4% (compared to 8.6% for England) and for working adults, negligible at 1% (compared to 3.4% for England). The main factor fuelling this growth is internal migration within the UK.
Since the fastest growth is predicted to occur in those age groups most likely to rely on health and social care services, this represents a significant challenge for local partners.

Health and wellbeing

Overall health tends to be good and according to census data, a lower proportion of people report having a long term health problem or disability compared with the country as a whole.

Nevertheless, for those long-term conditions associated with ageing, Gloucestershire has a significantly higher prevalence than the country as a whole and our demographic profile means that there will be an increasing prevalence of long-term health conditions amongst the population. For example, the number of people with dementia is predicted to rise by two thirds in the next 15 years.

The three leading causes of death reflect the national picture – cancer, cardiovascular disease and respiratory disease, though levels are lower than the national benchmark. However, life expectancy is significantly lower in the most deprived areas within the county, and the gap in life expectancy between the most and least deprived deciles is 7.8 years for men and 6.3 years for women.

Gloucestershire Economy

The Gloucestershire economy has approximately 30,000 business and supports approximately 291,500 jobs. Gloucestershire's total output represents 1% of that of the UK at £12.7bn. It has been independently ranked as the 11th most competitive[1] and the 9th most resilient economy[2] in the country.

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1 UK competitiveness index 2013, sourced from University of Exeter/Marchmont (2013) Gloucestershire Skills Plan Evidence Based Report.

2 Sourced from the LEP Network (2012)

The workforce is generally well-qualified and highly-skilled, with a higher than average proportion of professional occupations. GVA per head is on a par with the UK average, but ahead of the South West.

There are comparatively high business birth rates, and very high business survival rates. Significant sectors include manufacturing, health, public administration and defence (including GCHQ), education, construction and retail. Future employment growth is predicted in health, business administration and support services, construction and accommodation and food services, while the manufacturing sector is also expected to continue to be significant relative to the rest of the UK.
Despite relative strength and significant capacity for growth, the Gloucestershire economy is expanding more slowly than the UK average in recent years and that, compared to the rest of the UK, Gloucestershire's productivity is going down in relative terms.

While levels of employment are high, where there are hard to fill vacancies, these tend to be in skilled trades, and over 18% of local employers report a skills gap. The number of young people taking up apprenticeships is below the national average and there is evidence that education and training provision and careers advice does not reflect the skills needs of the local economy.
Without an increase in productivity driven by skills development, our ageing population and the fact that the working age population is not expected to grow could restrain further economic growth.

Unemployment across the county is low, though youth employment remains higher than before the recession, and long-term unemployment has risen and is still unacceptably high amongst particular groups, including those with a physical or learning disability, those with mental health needs and older workers. Nine areas (Lower Super Output Areas) rank amongst the 10% most deprived in England for Employment[3] (all in Cheltenham and Gloucester), while 23 areas are amongst the 10% most deprived for education and skills (including parts of all districts except Cotswold).

Community Safety

Crime rates for Gloucestershire have consistently fallen and have remained below the England and South West average for the past 12 years. However, at a district level, the rates for Gloucester and Cheltenham exceed the England and South West average (reflecting the urban nature of those districts). More local variations also exist and broadly reflect deprivation levels. The rate of first time youth offenders has been reducing year-on-year since 2009 and is lower than England and South West benchmarks.

However, perceptions of crime do not always reflect the reality, and there are particular challenges in promoting community safety, particularly amongst vulnerable groups, across a geographically large and in parts, sparsely populated county.
In contrast to these overall downwards trends, incidents of sexual violence and domestic abuse are increasing, driven in part by increased reporting rates and better

[3] ONS, Index of Multiple Deprivation 2015

recording. 2015 has seen a 27% increase in incidents of rape and a 19.1% increase in domestic abuse incidents since 1 January 2015.

Safeguarding Children and Adults

Reflecting national trends, Gloucestershire is experiencing growing demand on services for safeguarding children and adults.

While our rates of Children in Need and Children in Care are below national and regional rates, and consistent with those of similar areas, they are increasing and that is placing significant demand on service capacity. Analysis of referrals and registrations reveals that domestic abuse, drug and alcohol misuse and mental health are all significant factors in driving this demand. This is also reflected in a step increase since 2013 in the number of safeguarding referrals originating from the police - by 157% for children's safeguarding and 326% for vulnerable adults.

At the same time, police referrals for Child Sexual Exploitation have risen from 125 in 2013 to 148 in the first six months of 2015 and the number of registered sex offenders has risen from 345 in 2010 to 456 in 2015.