The Economy of Gloucestershire

1. Global economic setting[1]

In 2015, global economic activity remained subdued. Growth in emerging market and developing economies, while still accounting for over 70 percent of global growth, declined for the fifth consecutive year, while a modest recovery continued in advanced economies. Three key transitions continue to influence the global outlook:

- the gradual slowdown and rebalancing of economic activity in China away from investment and manufacturing toward consumption and services,
- lower prices for energy and other commodities, and
- a gradual tightening in monetary policy in the United States in the context of a resilient U.S. recovery as several other major advanced economy central banks continue to ease monetary policy.

Global growth is therefore projected at 3.4 percent in 2016 and 3.6 percent in 2017.

2. Gloucestershire Economy

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.

The total output of the Gloucestershire economy was approximately £14.8[2] billion in 2014, representing 12% of the value of output in the South West and 1% of the UK economy. According to latest figures, GVA per head in Gloucestershire was £24,342, slightly below the UK (£24,958) but above the South West average (£22,324).

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[1] World Economic Outlook Update Jan 2016EO
http://www.imf.org/external/pubs/ft/weo/2016/update/01/

2 Regional Gross Value Added (Income Approach), 1997 to 2014
http://www.ons.gov.uk/ons/datasets-and-tables/index.html?content-type=Dataset&edition=tcm%3A77-388336

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 reflected in the period Oct 2014 to Sep 2015 by an employment rate[3] of 79%, well above the national average of 73%. The corresponding unemployment rates have consequently reduced. Although worklessness may be less of a challenge than in other parts of the country there are however, still issues at County level that relate to youth unemployment and long term unemployment.

There are around 27,500[4] businesses in the County supporting a well-qualified and highly skilled employed workforce of 293,900[5] people[6]. The occupational structure in the County reflects this high level of qualification and skill base with a higher than average 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.

There is a positive entrepreneurial culture in Gloucestershire, and businesses starting up have very high survival rates. The County also ranks highly in terms of the proportion of employment in ‘export intensive’ sectors including both manufacturing and tradeable services.

Both manufacturing and health are significant sectors in the County. Other major sectors include public administration and defence (e.g GCHQ), education, construction and retail.

Employment growth is predicted in the health, business administration and support services, construction, accommodation and food services and the Mining, quarrying and utilities sector.

The characteristics of the job vacancies advertised reflect the demand across a range sectors indicating a healthy balance across industrial activities in the County.

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[7]. 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) 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

[3] Annual Population Survey, Oct 2014-Sep 2015 ONS Crown Copyright Reserved.
[4] UK Business Counts – Enterprises 2015, ONS Crown Copyright Reserved
[5] Annual Population Survey, Oct 2014-Sep 2015 ONS Crown Copyright Reserved..
[6] Includes employees and self employed
[7] Strategic Economic Plan, GFirst

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.

The relatively high proportion of residents who work at or from home may also be an indication of how advancement in modern technology has enabled a wide range of businesses to function efficiently in rural areas and to the positive relationship that exists between businesses and how they interact with the sensitivities of the high quality landscape and environment of the area.

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 to future economy of Gloucestershire.

2.1 Employment

The number of employees[8] in Gloucestershire has increased by 12,300 or 5% over the last five years to a total of 276,600[9] by 2014.

The annual growth rates relating to the number of employees between 2009 and 2014 in the County are depicted in Table 1. Apart from a blip between 2010 and 2011 annual growth rates have been positive resulting in an annual average growth rate of 0.9% over the period which was higher than the regional and slightly below the national average.

Table 1: Annual growth rates of number of employees in Gloucestershire, the South West and Great Britain from 2009 to 2014[10]

Year	Annual growth rate %		
	Gloucestershire	South West	Great Britain
2009-2010	1.7	-1.3	-0.2
2010-2011	-2.4	-2.0	0.0
2011-2012	1.1	-0.3	0.6
2012-2013	0.9	1.5	1.3
2013-2014	3.3	3.9	3.2
Average annual growth rate 2009-2014	0.9	0.4	1.0

Regarding employment status, the ratio of full-time to part-time employees in 2014 was 67% to 33% respectively as shown in Table 2.

[8] This figure is based on the number of employees and does not include self employed.
[9] Business Register and Employment Survey,2010-2014,ONS Crown Copyright Reserved.
[10] *Ibid.*

Table 2: Gloucestershire: Employment status 2014[11]

Year	Gloucestershire				
	F/T		P/T		Total*
	Number	%	Number	%	
2010	173,200	64.4	95,700	35.6	268,900
2011	164,400	62.6	98,100	37.4	262,500
2012	167,900	63.2	97,600	36.8	265,500
2013	176,100	65.8	91,700	34.2	267,800
2014	184,400	66.7	92,200	33.3	276,600

* These figures exclude farm agriculture (SIC subclass 01000).

A further 50,200[12] people were self-employed in the County between 2014 and 2015.

2.2 Employment by industrial sector

2.2.1 Past: 2010-2014

Figure 1 presents the industrial sectors in terms of their size, growth and local concentration[13].

The Health sector is the largest in terms of employees accounting for some 14% or 39,000 of the total number of employees. Hospital activities account for the largest number of employees spread across the numerous hospitals in the County as well as residential care. This locally concentrated sector has experienced an annual average growth rate of 3% which is represented by almost a 20% growth in the number of employees.

The Manufacturing sector is the second largest sector with 35,000 employees equating to 13% of the total number of employees which is well above the regional and national figures indicating that the sector is the most locally concentrated of all the sectors. The computer, electronic and optical products, fabricated metal products, manufacture of machinery and equipment, aerospace, rubber and plastics and food products sub sectors account for the highest number of employees. Despite the sector experiencing a decline since the previous year most of the above sub sectors did exhibit growth.

Retail, the third largest sector in terms of employees as shown in Figure 2 despite experiencing decline over the last five years is important not only in terms of a tourist attraction but as an important retail centre for the surrounding areas.

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[11] *Ibid.*

[12] Annual Population Survey July 2014-July 2015, ONS Crown Copyright Reserved

[13] Location quotients (LQ) are used for identifying an industry that is concentrated in a region. 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 of <1 indicates the local area is less concentrated than GB for an industrial activity, and a value >1 indicates the local area has a higher concentration of employment in the industrial activity relative to GB.

The Education sector is also large as shown in Figure 2 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, not unexpectedly this sector has suffered decline in employee numbers mainly in the primary and secondary sub sectors.

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, general cleaning of building activities, general business support and private security activities.

The Professional, scientific & technical sector is significant in terms of employees as shown in Figure 2, locally concentrated and shown growth as a result of activities relating particularly to management and technical consultancies, architectural activities and head offices located within the County.

The Accommodation & food services sector which is related to the tourism industry is not unsurprisingly important to Gloucestershire. The growth in the number of employees in the hotels, restaurants and pubs has been slightly outpaced by take away food shops and event catering activities.

The Construction sector has undergone growth in terms of number of employees over the last five years which is likely to be the result of the post-recession recovery in both the commercial and domestic building industry and associated activities

The Finance & insurance sector although a comparatively small sector in Gloucestershire has a degree of local concentration. It has however, undergone decline that not unsurprisingly relates to the banking, building society and non-life insurance sub sectors.

The Information & communication sector despite a negative annual average growth over the last five years has shown some growth in since 2013 particularly relating to the business and domestic software development and computer consultancy and other related activities which also account for most of the employees in this sector.

The Mining, quarrying and utilities sector is important to Gloucestershire a potentially 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.

The Public administration and defence sector is also important in the County. Decline in the number of employees is however, inevitable in light of the central government cuts.

Although the Agriculture, forestry & fishing sector[14] appears small and has shown a decline in terms of employment it is an important sector in Gloucestershire. According to the June 2013 statistics from Defra[15] 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.

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 re-introduction of rare breeds, organic farming, biomass production, farm open days and other tourism related activities in order to maintain their livelihood.

The Arts, entertainment & recreation sector important to the County but 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.

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[14] The Business Register and Employment Survey cannot easily measure agricultural employment and therefore data regarding this sector is incomplete.

[15] 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-england-and-the-uk-at-june

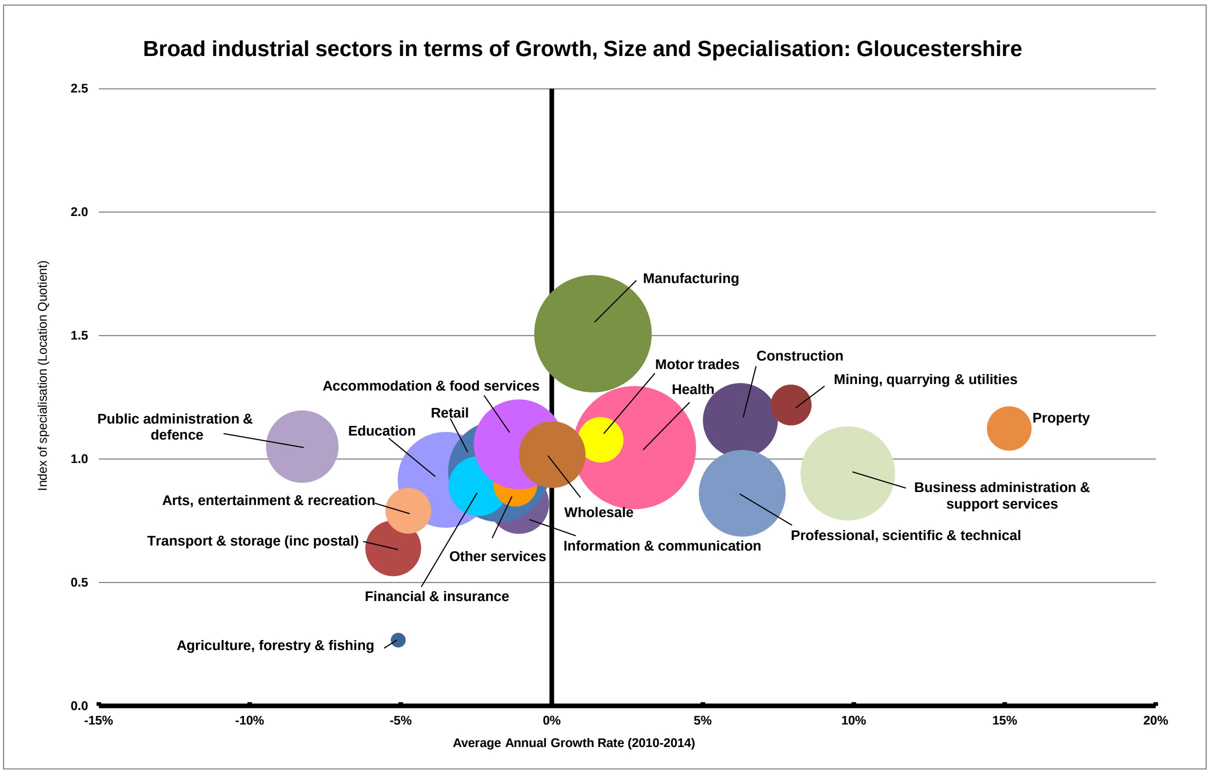

Figure 1: A comparison of industrial sectors in terms of growth, size and specialisation in Gloucestershire[16][17]

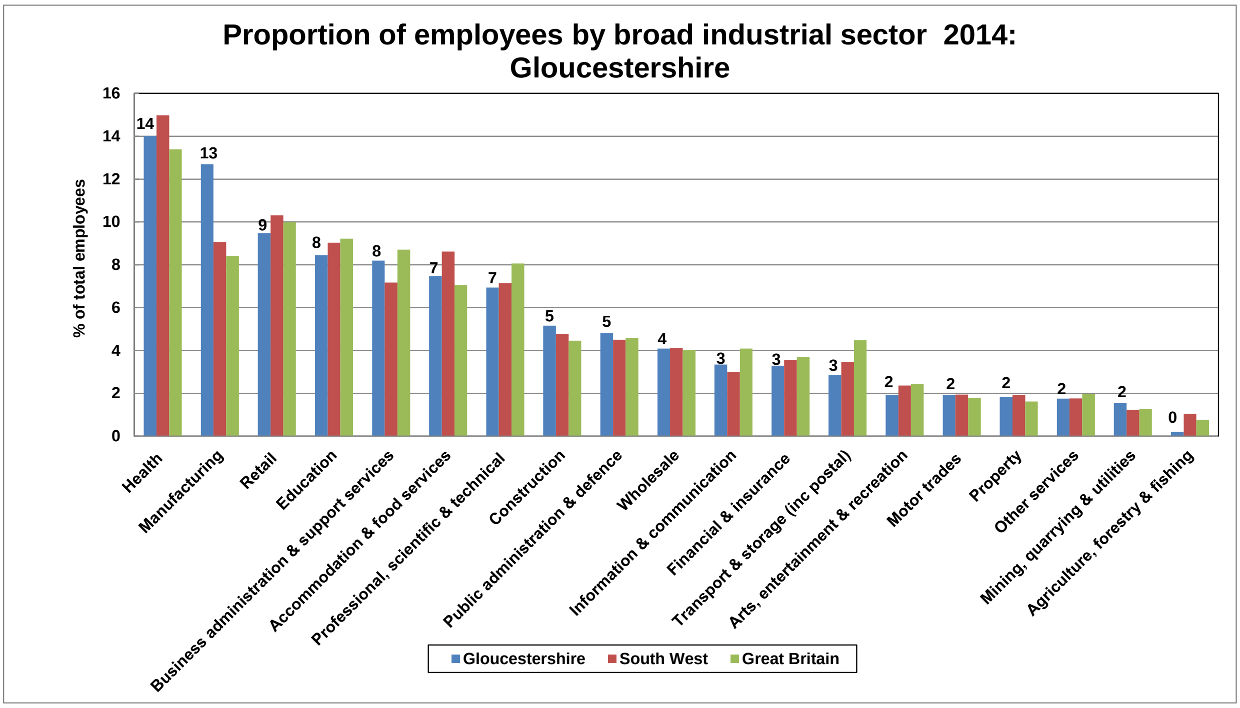

Figure 2: The proportion of employees by broad industrial sector 2014: Gloucestershire[18][19]

[16] Business Register and Employment Survey 2010-2014, ONS Crown Copyright Reserved.
[17] The Agriculture, forestry & fishing industrial sector is not wholly represented by the BRES data.

2.2.2 Future: 2015-2025

Economic projections generated by the Local Economic Forecasting Model (LEFM)[20], provide an indication of future economic growth and predict potential changes in employment. **These projections are presented as a guide, they do not take into account the impact of current policies and initiatives.**

According to LEFM employment (employees and self-employed) in Gloucestershire is set to increase between 2015 and 2025 to 340,500 people, however, growth is expected to be at a more conservative rate with a projected average annual change of 0.3% which is lower than the South West and nationally as shown in Table 3.

Table 3: Projected Average annual change in employment: 2015-2025[21]

Area	Projected Average annual change 2015 to 2025
Gloucestershire	0.3
South West	0.5
UK	0.4

Considering the projected employment by sector over the next ten years for Gloucestershire compared to the UK average, four sectors, namely, Accommodation & food services, Construction, Other services[22] and Mining, quarrying & utilities are predicted to experience the most growth. These sectors along with the Business administration & support services sectors are all expected to grow at well above the national rate as shown in Figure 3.

The Agriculture, forestry & fishing and Manufacturing sectors match the decline expected nationally but to a greater degree while the Wholesale sector is expected to decline in complete opposition to the national picture as depicted in Figure 3.

[18] Business Register and Employment Survey 2010-2014, ONS Crown Copyright Reserved.
[19] The Agriculture, forestry & fishing industrial sector is not wholly represented by the BRES data.
[20] The LEFM has been developed to forecast economic activity in local areas in a way that is consistent with regional and national forecasts. Although the model includes a number of econometric relationships, lack of data currently precludes the estimation of a complete model in the conventional sense. Many of the relationships are therefore imposed by assumption, based on the broader regional or national models estimated by Cambridge Econometrics and the Institute for Economic Research (University of Warwick) LEFM should therefore be regarded primarily a simulation model rather than an accurate econometric representation of a local economy.
[21] LEFM Aug 2015 Cambridge Econometrics/Institute for Economic Research (Univ. of Warwick).
[22] Other services include activities of membership organisations, repair of computers, personal and household goods, other personal service activities e.g. hairdressing, beauty and other personal services.

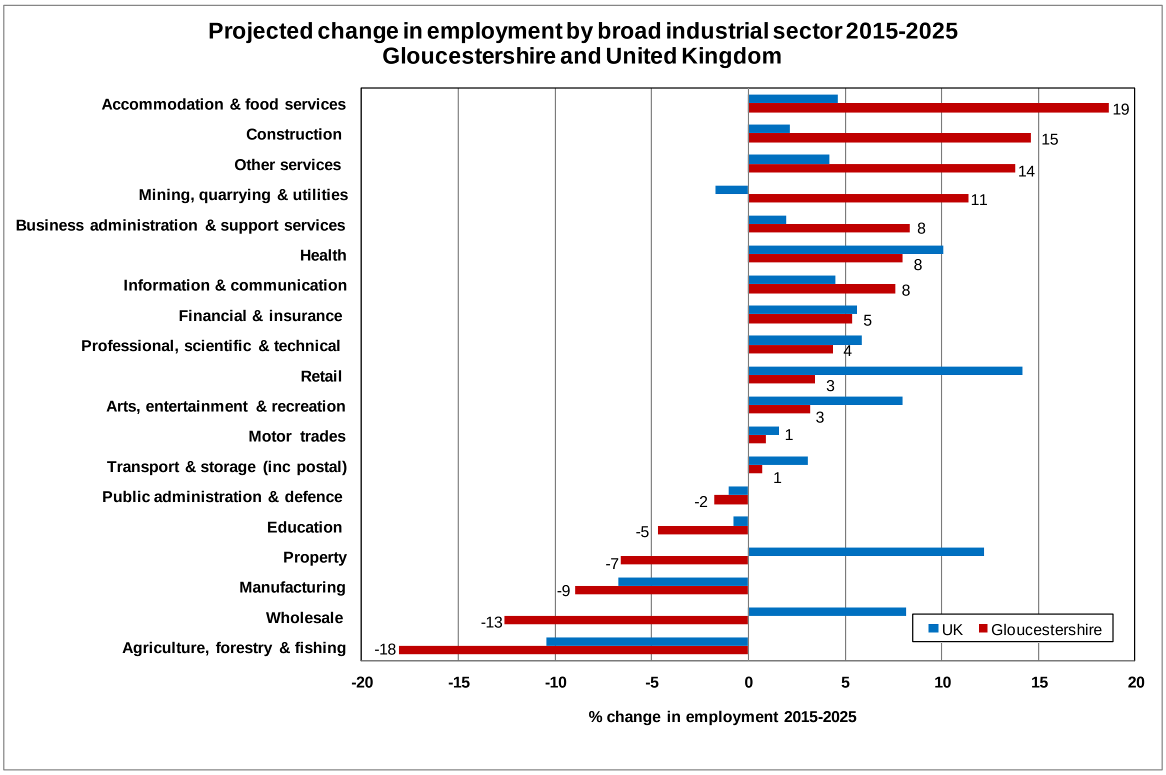

Figure 3: Projected change in employment in Gloucestershire and the United Kingdom from 2015 to 2015[23]

2.3 Businesses

The number of businesses in Gloucestershire increased by 8% in the last five years as shown in Table 4 amounting to 27,540 businesses in 2015[24]. This growth however, is below the regional average and less than the national average by some 6%.

Table 4: Growth in the number of businesses from 2010 to 2015[25]

Growth in number of businesses 2010-2015	
Area	%
Gloucestershire	8.1
South West	9.3
Great Britain	13.5

Much in accordance with the national structure the majority of businesses (76%) are small, employing up to four people. There are however, a number of larger businesses employing between 50 and 99 people as shown in Table 5.

[23] LEFM Aug 2015, Cambridge Econometrics/Institute for Employment Research (Univ. of Warwick).
[24] UK Business Counts – Enterprises 2015, ONS Crown Copyright Reserved.
[25] *Ibid.*

Table 5: Size breakdown of businesses in Gloucestershire, the South West and Great Britain 2015[26]

Size		Gloucestershire	South West	Great Britain
Employment Sizeband: Number and %	0 to 4	20,945	167,015	1,817,650
	% 0-4	76	76	76
	5 to 9	3,460	28,875	296,105
	% 5-9	13	13	12
	10 to 19	1,715	13,830	145,515
	% 10-19	6	6	6
	20 to 49	875	7,220	76,060
	% 20-49	3	3	3
	50 to 99	290	2,080	24,175
	% 50-99	1	1	1
	100 to 249	155	1,110	13,715
	% 100-249	1	1	1
	250 to 499	50	355	4,420
	% 250-499	0.2	0.2	0.2
	500 to 999	25	150	2,175
	% 500-999	0.1	0.1	0.1
	1000+	20	185	2,545
	% 1000+	0.1	0.1	0.1
	Total	27,540	220,825	2,382,370

Business start-ups in Gloucestershire increased by 43% over the last five years amounting to 3,200[27] businesses starting up in 2013 as depicted in Figure 4.

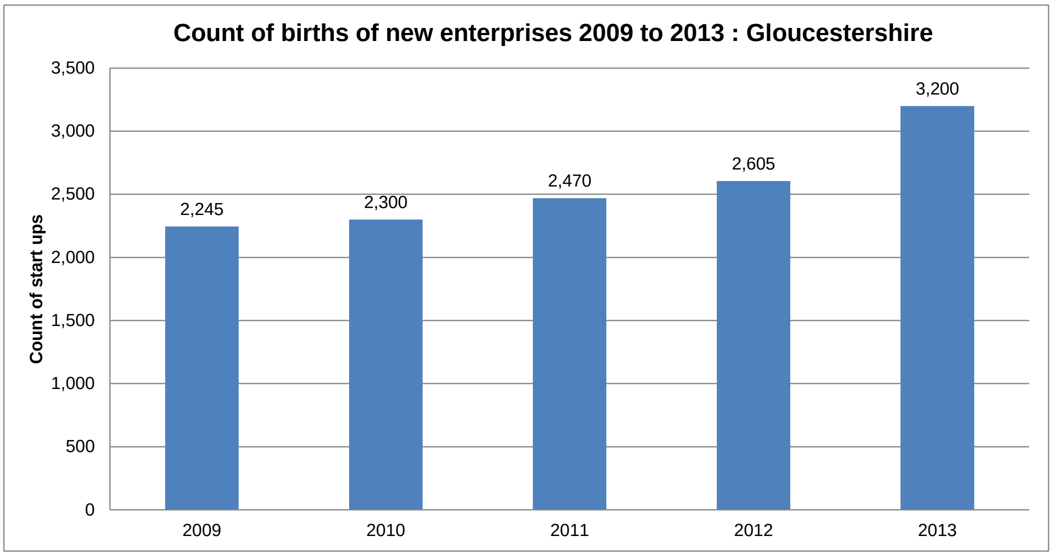

Figure 4: Trend in business births between 2009 and 2013 in Gloucestershire[28]

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[26] *Ibid.*
[27] Business Demography 2013, ONS Crown Copyright Reserved
[28] *Ibid*.

One year and three year survival rates were higher than the national average as shown in Table 6.

Table 6: Business survival rates from birth in 2010[29]

Area	Survival rates from birth in 2010		
	1 Year %	2 Year %	3 Year %
Gloucestershire	88.7	74.6	60.4
South West	88.1	74.2	59.9
Great Britain	86.7	72.5	57.1

2.4 Unemployment

The Claimant Count[30] is a measure of the number of people who are unemployed and claiming benefits. 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 (JSA) plus those who claim Universal Credit and who are out of work.

The decreasing trend seen in the last thirty years in the number of people claiming JSA in Gloucestershire has been continued under the Claimant Count measure.

It is evident from Figure 5 that the unemployment claimant rate for Gloucestershire has closely followed the regional rate and although both mirror the national trend they are some 1% below it. The County rate has generally declined since April 2013 to 1.1% representing 4,280 people in March 2016[31].

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[29] *Ibid*.

[30] For more information please refer to ONS website.

[31] Job Seekers Allowance, ONS Crown Copyright Reserved.

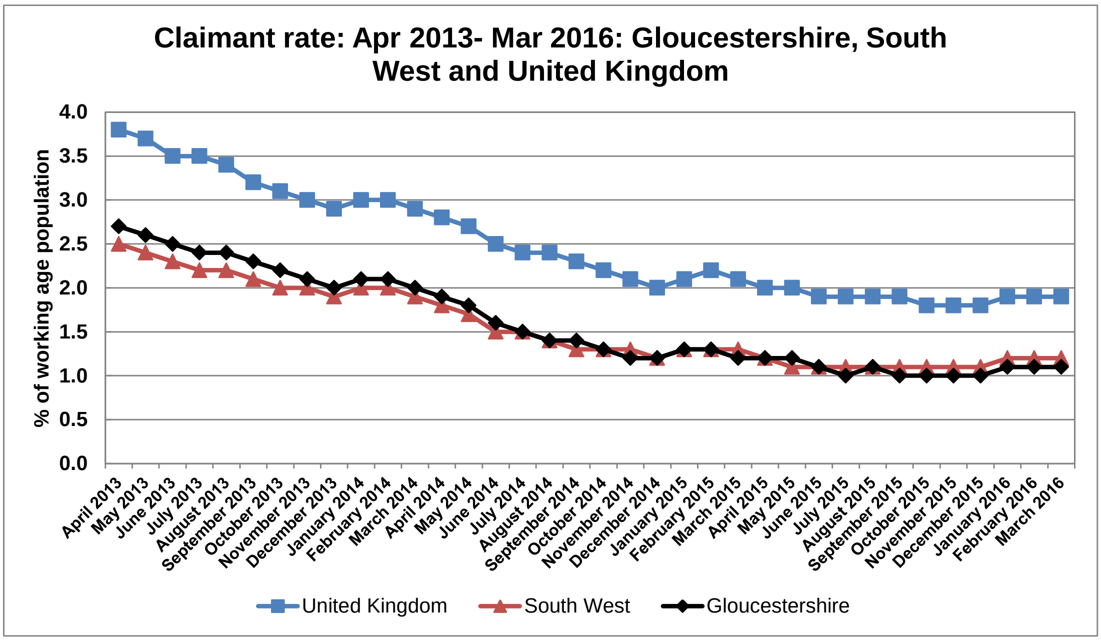

Figure 5: Unemployment claimant rate Jan 2014 to Dec 2015: Gloucestershire, South West and United Kingdom[32]

Table 7: Ward claimant rate above County average[33]

District	Ward	Rate
Cheltenham	Lansdown	1.2
	Swindon Village	1.2
	St Paul's	1.3
	St Peter's	1.3
	Springbank	1.4
	St Mark's	2.0
	Hesters Way	2.1
	Oakley	2.1
Cotswold	Watermoor	2.1
Forest of Dean	Awre	1.2
	Littledean and Ruspidge	1.2
	Bream	1.3
	Alvington, Aylburton and West Lydney	1.4
	Lydbrook and Ruardean	1.4
	Newland and St Briavels	1.4
	Coleford East	1.5
	Newent Central	1.6
	Coleford Central	2.0
	Cinderford West	2.3
	Cinderford East	2.5
	Lydney East	2.5
Gloucester	Barnwood	1.3
	Tuffley	1.8
	Kingsholm and Wotton	2.2
	Moreland	2.3
	Matson and Robinswood	2.8
	Podsmead	3.4
	Barton and Tredworth	3.5
	Westgate	3.8
Stroud	Cainscross	1.2
	Valley	1.4
	Central	1.7
	Slade	1.9
Tewkesbury	Tewkesbury Town with Mitton	1.3
	Northway	1.6
	Tewkesbury Prior's Park	2.8

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[32] *Ibid.*

[33] *Ibid.*

There were thirty six wards (of 146) with claimant rates above the County average as shown inTable 7. They range from All Saints, Lansdown, Swindon Village, Awre, Cainscross and Littledean and Ruspidge with 1.2% to Westgate with 3.8%.

The situation relating to those 18-24 year olds claiming unemployment benefits in Gloucestershire is generally one of improvement from 2013 to 2016 with the number of claimants falling from 2,575 to 935 people. However, Figure 6 shows there has been an increase in young claimants since November 2015.

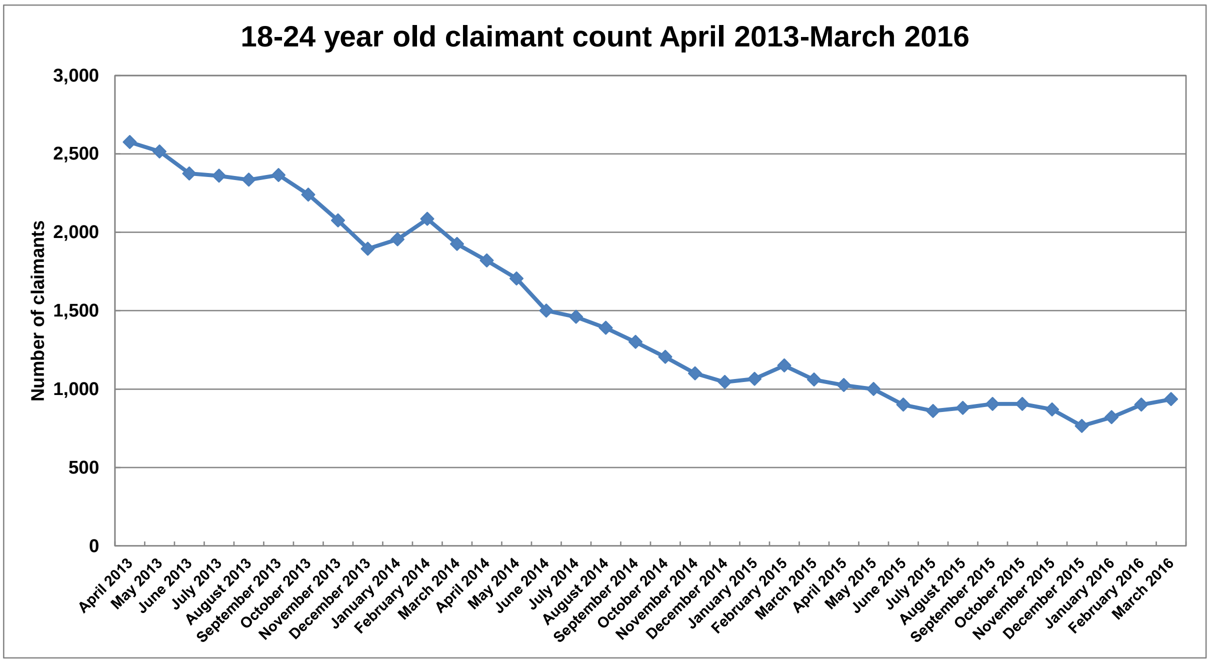

Figure 6: 18-24 year old claimant count[34]

The number of 16 to 18 year olds Not in Education, Employment or Training (NEETs) in Gloucestershire as depicted in Figure 7 has decreased over the last five years to 427 people in May 2016.

[34] *Ibid.*

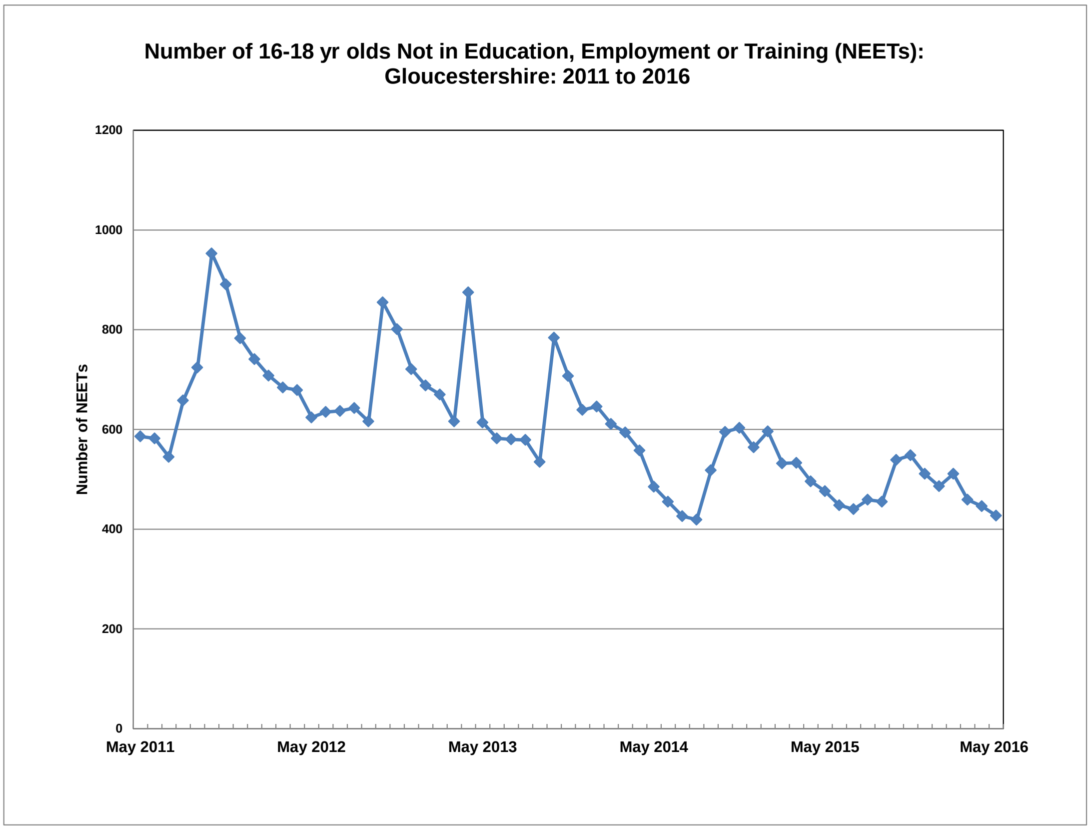

Figure 7: Number of 16-18 year olds Not in Education, Employment or Training (NEETs) in Gloucestershire: 2011 to 2016[35]

2.5 Qualifications and occupation

It is evident from Table 8 that in Gloucestershire some 30% of the resident population aged 16 and over had Level 4 qualifications and above in 2011 which was well above the national average of 27%. At the other end of the scale those with No qualification accounted for 20% of the resident population over 16 which was some 3% below the national average and amounted to 96,000 people.

[35] Prospects.

Table 8: Level of qualification of residents aged 16 and over comparison 2011[36]

Level of qualification of residents aged 16 and over: % of total		
	Gloucestershire	England and Wales
No qualifications	19.6	22.7
Level 1 qualifications	13.5	13.3
Level 2 qualifications	16.0	15.3
Apprenticeship	4.0	3.6
Level 3 qualifications	12.6	12.3
Level 4 qualifications and above	29.9	27.2
Other qualifications	4.3	5.7
Total	490,233	45,496,780

Professional occupations feature highly in Gloucestershire and in addition to the Skilled trades occupations equated to a third of the resident employed population in 2011 as shown in Figure 8.

The Managers, directors and senior officials account for a higher proportion of the resident based employment in the County compared to the regional and national averages.

The occupational structure of Gloucestershire not only reflects the high skill needs of its industrial base but also the importance of skilled trades to the balance of the economy.

[36] Census of Population 2011: LC5102EW - Highest level of qualification by age, ONS Crown Copyright Reserved:
Level 1: 1-4 O Levels/CSE/GCSEs (any grades), Entry Level, Foundation Diploma, NVQ Level 1, Foundation GNVQ,Basic/Essential Skills;
Level 2: 5+ O Level (Passes)/CSEs (Grade 1)/GCSEs (Grades A*-C), School Certificate, 1 A Level/ 2-3 AS Levels/VCEs, Intermediate/Higher Diploma, Welsh Baccalaureate Intermediate Diploma, NVQ level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First/General Diploma, RSA Diploma;
Level 3: 2+ A Levels/VCEs, 4+ AS Levels, Higher School Certificate, Progression/Advanced Diploma, Welsh Baccalaureate Advanced Diploma, NVQ Level 3; Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma;
Level 4 and above: Degree (for example BA, BSc), Higher Degree (for example MA, PhD, PGCE), NVQ Level 4-5, HNC, HND, RSA Higher Diploma, BTEC Higher level, Foundation degree (NI), Professional qualifications (for example teaching, nursing, accountancy);
Other qualifications: Vocational/Work-related Qualifications, Foreign Qualifications (not stated/level unknown).

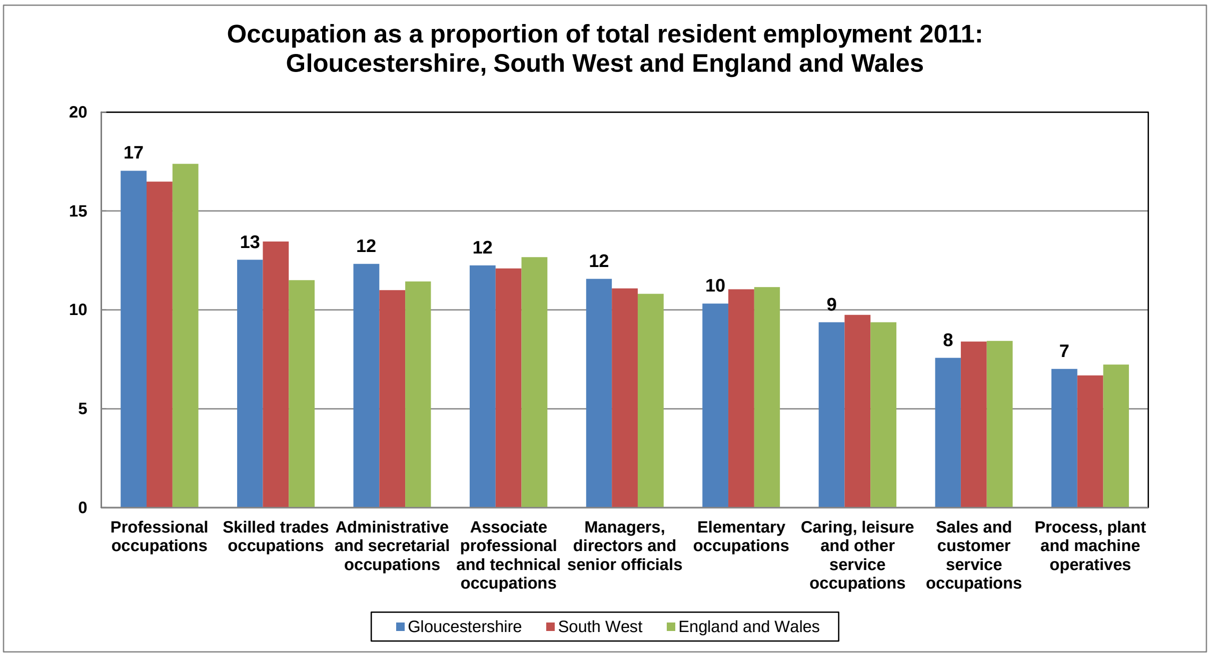

Figure 8: Occupation as a proportion of total employment 2011: Gloucestershire, South West and England and Wales[37]

In terms of the projected growth of occupational employment over the next ten years, as outlined in Figure 9, the expected increase in Managers, directors and senior officials follows the national projection although at a higher rate for Gloucestershire which points not only to the continuing growth in businesses but also the already high proportion of these occupations in the County. The projected increase in employment in the Caring, leisure and other services occupations is undoubtedly an indication of the growing demands of an ageing population.

It is evident from Figure 9 that the Professional and Associate professional occupations are projected to grow at a much lower rate than the UK while Skilled trades and Process, plant and machine operatives are expected to increase in opposition to the national picture.

The Administrative and secretarial occupations however, are expected to decline in line with the UK trend.

[37] Census of Population 2011: LC6112EW - Occupation by age, ONS Crown Copyright Reserved.

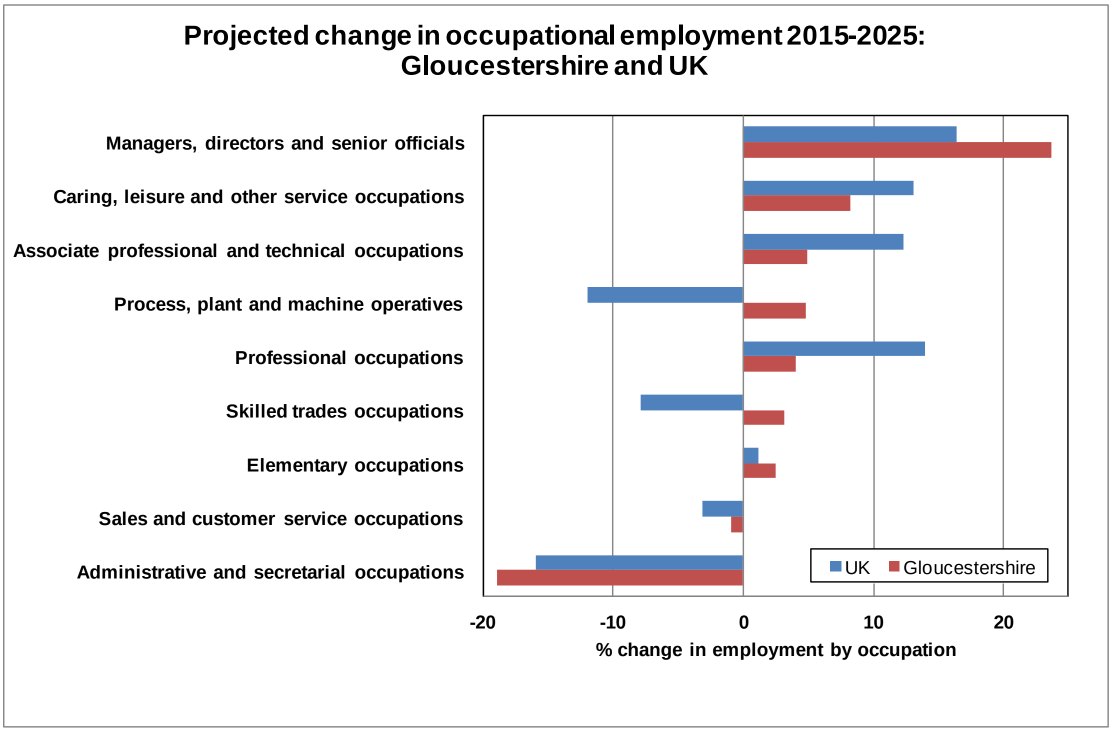

Figure 9: Projected change in occupational employment 2015-2025: Gloucestershire & UK[38]

2.6 Vacancies

The data used in Figure 10 are provided by Labour Insight, an interactive tool which delivers real time access to job vacancies from a comprehensive range of sources including job boards, employer sites, newspapers, public agencies etc. Data extraction and analysis technologies mine and code data from each job listing to provide analysis on industries, occupations, skills and qualifications. The tool will inevitably not capture all vacancies.

Figure 10 shows the trend in new vacancies for each month from January to October 2015. The number of new vacancies presents an overall increasing trend from 3,485 vacancies in January to 5,502 in October.

[38] LEFM Aug 2015, Cambridge Econometrics/Institute for Economic Research (Univ. of Warwick).

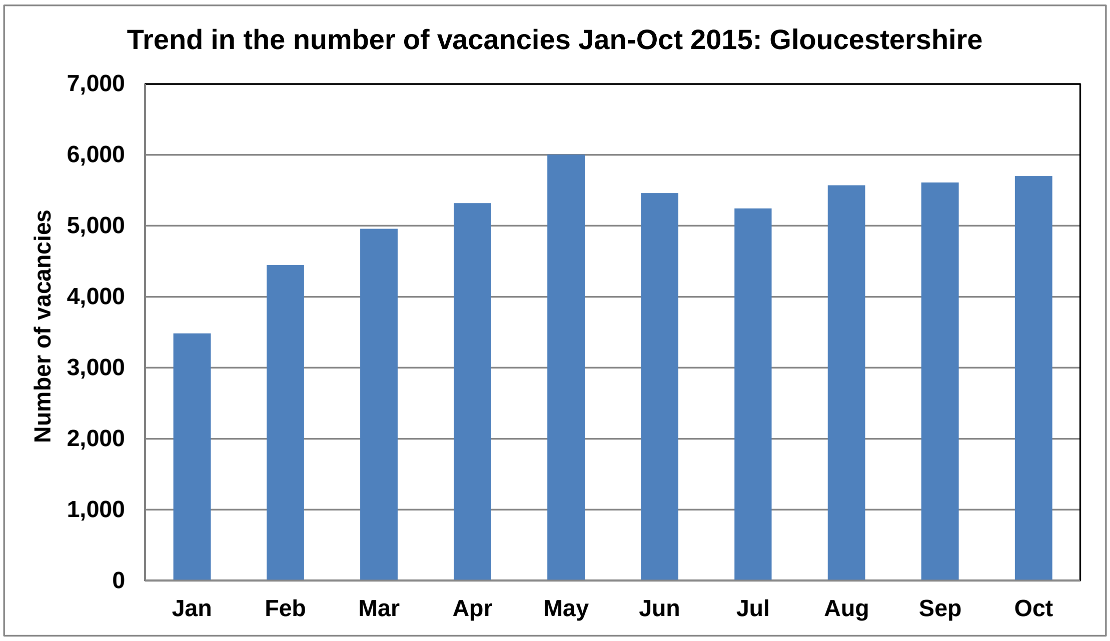

Figure 10: Trend in job vacancies in Gloucestershire in 2015[39]

The top twenty occupations identified from a total of 51,800 job vacancies advertised over the first ten months of 2015 are shown in Figure 11. Vacancies related to a number of highly skilled occupations including Information Technology indicating the importance and variation in these requirements across all sectors of industry. The demand for Chefs points to the key role played by the Accommodation and food services sector with its links to tourism. The Administrative occupations are also an indication of the need for these roles across all sectors and finally the demand for Nursing occupations reflects the increasing importance of the Care sector in the County.

[39] Labour Insight.

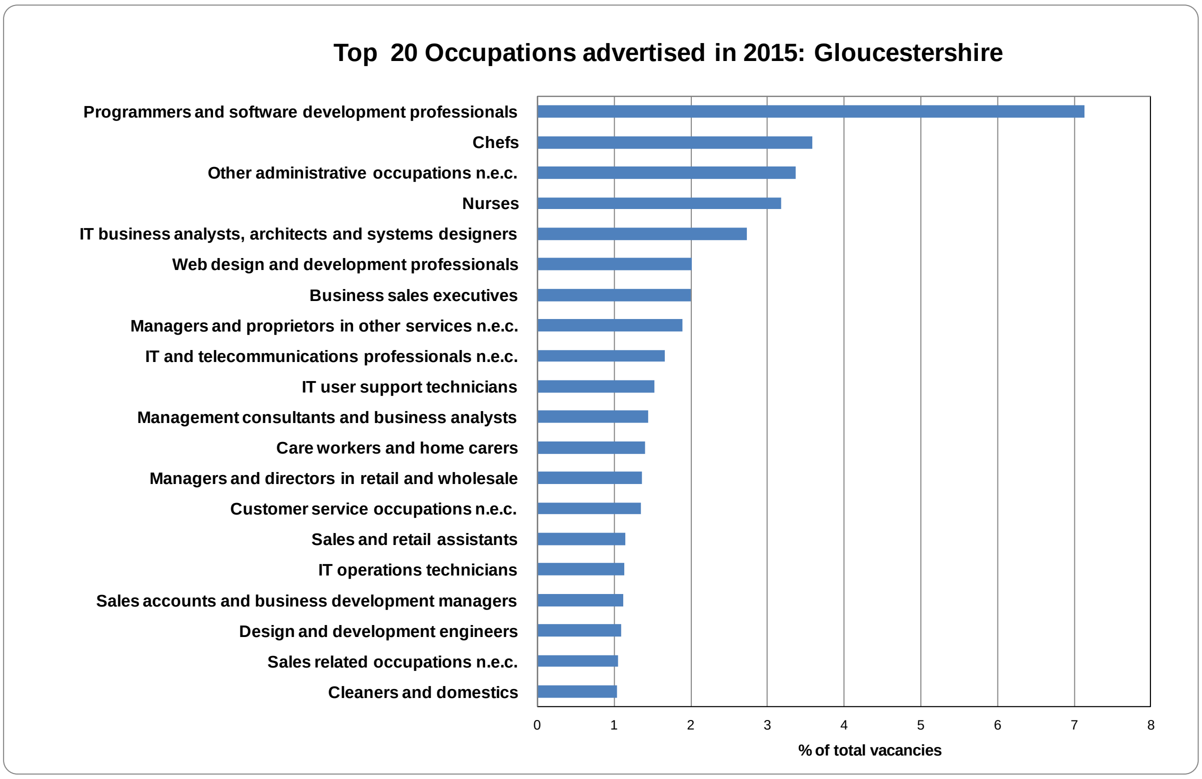

Figure 11: Top occupations advertised in Gloucestershire in 2015[40]

2.7 Commuting to Work

In 2011, of the 240,320 residents aged 16 and over in Gloucestershire who commuted to work in 2011, some 83.1% equating to 199,735 people worked within the County as shown in Table 9.

Table 9: Commuting to Work within Gloucestershire 2011[41]

	Workplace Destination						
Resident Origin	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Gloucestershire
Cheltenham	29,462	1,768	311	4,454	1,191	6,313	43,499
Cotswold	1,487	16,221	147	796	957	687	20,295
Forest of Dean	1,073	329	15,379	4,036	467	1,646	22,930
Gloucester	5,057	948	1,054	29,407	4,699	7,053	48,218
Stroud	1,947	2,334	283	5,492	23,998	1,791	35,845
Tewkesbury	8,293	873	464	5,457	946	12,915	28,948
Gloucestershire	47,319	22,473	17,638	49,642	32,258	30,405	199,735

In addition 40,585 (16.9%) residents commuted out of Gloucestershire to work. Some 42% of Gloucestershire commuters travelled to the rest of the South West, 24% commuted to the West Midlands region, 13% went to the South East region and remaining work destinations were in Wales and London.Figure 12 provides

[40] *Ibid.*

[41] Census of Population 2011: WU01UK - Location of usual residence and place of work by sex, ONS Crown Copyright Reserved.

more detail and shows the most common district of work for residents who commute to work outside of the County. South Gloucestershire was the most common destination accounting for 13.8% of the total, this was followed by Bristol and Swindon accounting for 8.8% and 8.7% respectively.

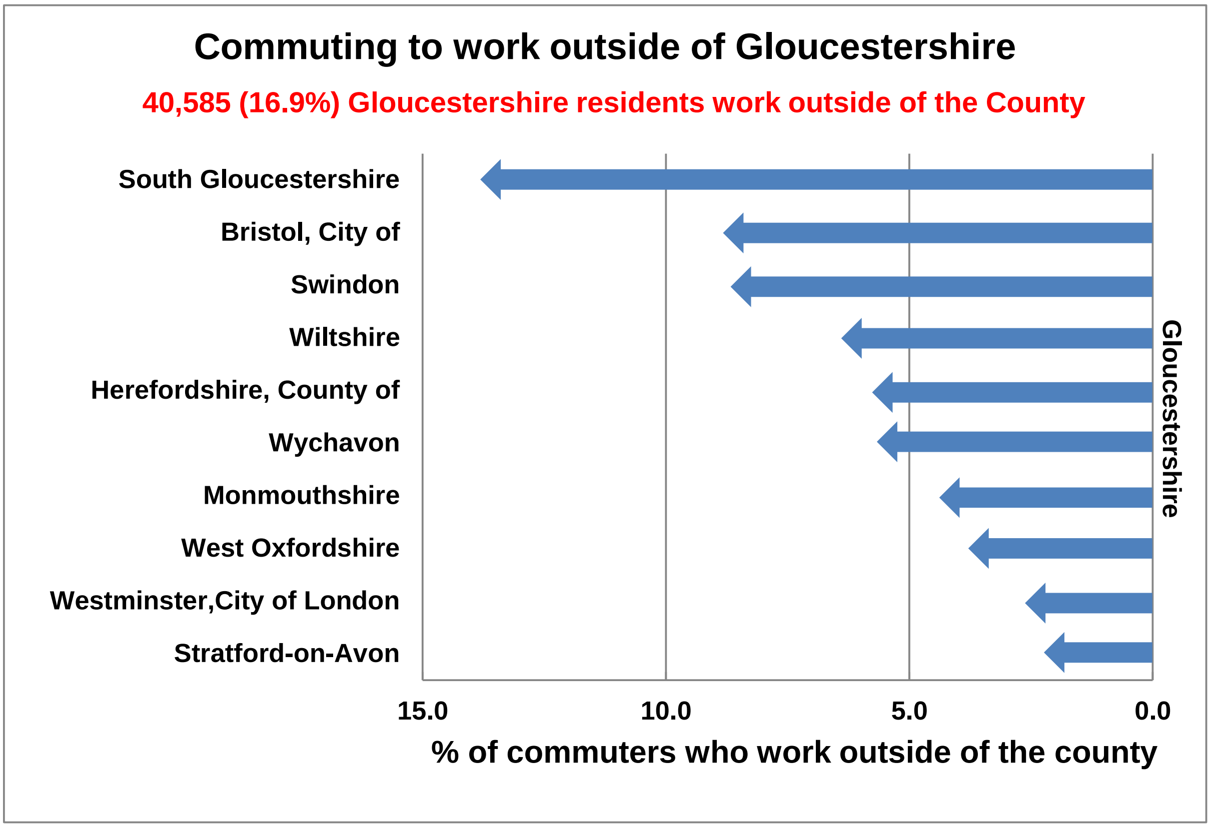

Figure 12: Commuting to work outside of Gloucestershire – main flows[42]

Of those 38,148 (16.7%) workers who commuted in to the County, nearly 40% came from the West Midlands region, 35% from the rest of the South West region, and the rest mainly from Wales and the South east region. Figure 13 provides more detail and shows the most common district of residence for workers who live outside of the County. Wychavon was the most common district of residence accounting for 13.1% of the total, this was followed by South Gloucestershire and Herefordshire accounting for 9.1% and 8.1% respectively.

[42] *Ibid.*

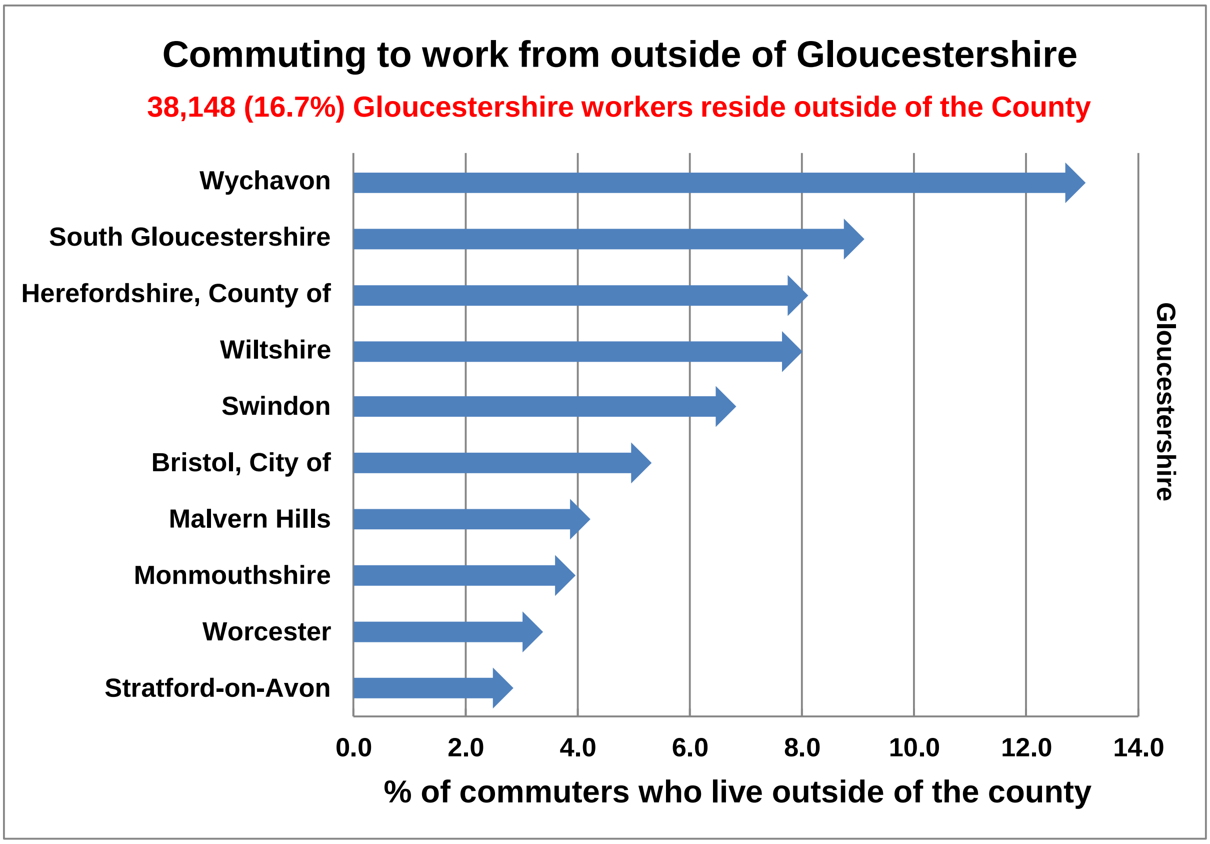

Figure 13: Commuting to work in Gloucestershire from outside of the County – main flows[43]

Overall there is a net outward flow from Gloucestershire amounting to 2,437 people as shown Table 10.

Table 10: Number of workers commuting in or out of Gloucestershire districts 2011[44]

Commuting to work	Total outward	Total inward	Net
Cheltenham district	19,782	24,148	4,366
Cotswold district	13,820	15,709	1,889
Forest of Dean district	14,627	6,015	-8,612
Gloucester district	23,617	26,131	2,514
Stroud district	20,526	13,287	-7,239
Tewkesbury district	20,566	25,211	4,645
Gloucestershire (includes offshore installation & outside UK)	40,585	38,148	-2,437

2.8 Work at home

In addition to those who commuted to work in 2011 there were another 38,200 people who worked at home in Gloucestershire equating to 13% of those

[43] *Ibid.*
[44] *Ibid.*

employed residents aged 16 and over as shown in Table 11, this represents an increase of 2% since 2001.

The comparatively high proportion of those working at home coupled with the relatively large number of self employed are perhaps an indication of how the nature of the industrial structure of the County combined with improvements in communication and other technological advances have enabled businesses to locate and function much more efficiently in the more rural areas of the County.

Table 11: Proportion of residents in employment who work at home 2011[45]

District	Work mainly at or from home Number	Work mainly at or from home as % of residents aged 16+ in employment
Cheltenham district	6,199	10
Cotswold district	8,268	20
Forest of Dean district	5,618	14
Gloucester district	4,439	7
Stroud district	8,353	14
Tewkesbury district	5,331	13
Gloucestershire	38,208	13

[45] Census of Population 2011: WU01UK - Location of usual residence and place of work by sex, ONS Crown Copyright Reserved.