

GESSC September 19, 2025

23 invitees. 15 attendees. 9 members. 1 Member Apologies 4.

Reports pack thin!

The Gloucestershire Economic Strategy Scrutiny Committee will:

1. *To review the decisions, plans, and policies of the Gloucestershire City Region Board;*
2. *To scrutinise the impact and delivery outcomes of successful Strategic Economic Development Fund (SEDF) bids;*
3. *To identify future areas of economic growth for inclusion in the Gloucestershire Economic Strategy*;*
4. *To provide a scrutiny function for any potential devolution deal in so far as it relates to the Gloucestershire City Region Board or the Gloucestershire Economic Strategy*.*

The Gloucestershire Economic Strategy Scrutiny Committee may not exercise any function other than those outlined above.

**Note: The Gloucestershire's Economic Strategy (2024-2034) outlines the county's existing strengths, opportunities and challenges and provides a clear statement of intent for Gloucestershire – to achieve greener and inclusive economic growth that delivers a stronger, more sustainable, economy; and sets us on the journey to achieving a new Gloucestershire 2050 Vision.*

1. Cllr Julian Tooke, Gloucestershire County Council's (GCC), Cabinet Member and Chair of the City Region Board, gave an update supported by David Owen, GCC Director of Economy and Environment, and Ben Watts, GCC Planning, Economy and Growth Manager.
 - a. Said to be a "new committee". There was a different participation. Unclear why. I am now one of the most experienced and joined others in pointing out that this was intended to be a succession with a different format but the same remit.
 - b. Owen met with Leaders from each of the districts. (Cllr Every is the CDC representative, but Cllr Wilkinson had attended for us at their last general meeting.)
 - c. They fed into the Local Growth Plan (LGP), which is expected to be finalised in November.
 - d. The Spatial Development Strategy (SDS) intends a countywide spatial development plan with central government passing legislation.
 - e. Strategic Economic Development Fund (SEDF) — it had been agreed at September's City Region Board that a separate working group would be set up to hear presentations from each of the 9 SEDF bidders.

Feedback from this meeting would be incorporated into the Senior Officer Group meeting and the SEDF bid report which would go to November's City Region Board. The decision on which of the bids would be funded would be made in November's meeting.

- f. The LGP will have an action plan by November for monitoring. It has five missions, Talent and Future Skills; Employment and Health for People and Places; Thriving Communities and Culture; Environment, Housing and Infrastructure; Innovation, Investment and Enterprise. Summary details in Appendix 1.
 - g. David Owen said there was a good process with good senior participation. It was an economic growth board. Julian Tooke emphasised a partnership approach, which was Cllr Spivey's way.
 - h. Officers confirmed that they believe there was good collaboration across the districts.
- 2. We discussed sensibly what we should be doing as committee to meet with the county needs and be taken seriously. There was some frustration from some members about GESSC being out of sync with information from CRB. Officers blamed this on central government legislation and it's quick timescales. They are planning an action to resolve this difficulty.
 - a. It was confirmed that the committee wanted to add value through scrutiny and intended to bring items on areas where this could be done, such as FoD, see below.
 - b. There was a debate about whether the focus should be only on business economics or whether the economic health of the county took into account broad notions of economic well-being and contribution.
- 3. Members from Forest of Dean expressed concern about their economic growth and hope that the LGB would reflect the whole county and not be focused on prime economic areas only.
 - a. Tooke confirmed that this matter to him and this was why the county had supported the Forest of Dean UNESCO Biosphere Application.
 - b. Members pointed out that in wealthy areas there was still pockets of deprivation. There was a desire for more focus on skills and well-being.
- 4. We had a data presentation once again, with the same limitations that had been previously noted (late arrival and low granularity because of government designs). Nevertheless, there was some interesting information. I pointed out that the link between the data and what was being done with it, strategic significance, was not being described again and it was agreed that this would be desirable. Edited version at Appendix 2.
 - a. There is a 17.4% growth in population over 25 years, with a 43% increase in those over 65 while the number of children have declined.
 - b. Insufficient affordable housing. CDC is the poorest in providing this.

- c. The average monthly rent in Gloucestershire is over the national average.
- d. CDC Is weakest in digital connections.
- e. CDC Is the only district with job density greater than one – that is it lacks people to do jobs.
- f. The county loses young people but gains and all other age groups.
- g. In general we are presented to when we could've read the report and ask questions. The data represents outcomes and the drivers are not provided. This implies that we are tackling issues without necessarily understanding the systemic context, if the data is considered to be significant in the strategic process. There are no figures on industrial needs and trends generally, as an example of the question, are we getting the figures we need or just the ones that are available? They are macroeconomic figures.

5. Mobile data

- a. Findings reveal a considerable disparity between Ofcom's official coverage data model and reality. Ofcom has acknowledged flaws in their model data and have release new coverage checker that attempts to reflect the actual real-world experience of users, but this data is still improving.
- b. There are barriers to 5g rollout. They will belong to the natural issues: more infrastructure required, higher costs, not always commercially viable, not everybody in the community wants it as there are health and aesthetic concerns.

Chart 3: Survey Results by Constituency

	RSP Data	OFCOM View	RSP Data	OFCOM View
Constituency	% Postcodes without Good Voice	% Area without Good Voice	% Postcodes without Good Data	% Area without Good Data
Kenilworth & Southam	29	0	3.8	0
The Wrekin	27.6	0	4.7	0
Telford	27.6	0	4.3	0
Stratford-on-Avon	26.8	0	3	0
Tewkesbury	22.6	0	4.2	0
Warwick & Leamington	20.9	0	2	0
Forest of Dean	19.3	0.2	3.2	0
North Shropshire	17.8	0	2	0
Hereford & South Herefordshire	17.4	0.2	2.7	0
Montgomeryshire & Glyndwr	17.2	3.6	5.2	0.9
North Cotswolds	17	0	3.1	0

Monmouthshire	16.6	2.5	3.7	1
South Cotswolds	16.2	0	1.8	0
South Shropshire	15.2	0.2	2	0
Brecon, Radnor & Cwm Tawe	14.4	5	2.9	1.4
Bromsgrove	14.1	0	1.2	0
Cheltenham	12.9	0	2.7	0
Wyre Forest	12.3	0.1	1	0
West Worcestershire	10.6	0	0.7	0
North Herefordshire	10.2	0	0.9	0
Gloucester	9.7	0	1.4	0
Stroud	9	0	0.9	0
Droitwich & Evesham	8.9	0	0.6	0
Shrewsbury	7.7	0.1	0.5	0
Nuneaton	7.7	0	0.2	0
Redditch	7.3	0	0.3	0
North Warwickshire & Bedworth	7.3	0	0.6	0
Rugby	6.7	0	0.5	0
Worcester	4.6	0	0.4	0

6. After discussion, it was agreed that Democratic services would prepare a work plan for agreement with the cabinet member. Does this make the scrutiny body independent like CDC? Not sure.

Appendix 1

Draft Local Growth Plan (September 25) - Emerging missions and delivery activities

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Draft Local Growth Plan (September 25) - Emerging missions and delivery activities

Missions	Areas of activity
<p>Mission 1: Talent and Future Skills – “Unlocking talent, unlocking tomorrow”</p> <p><i>To secure the county’s long-term economic resilience and productivity, we must invest in our talent pipeline and future skills.</i></p>	<ul style="list-style-type: none"> • Skills • Green Skills • Business engagement
<p>Mission 2: Employment and Health for People and Places – “Wellbeing without barriers”</p> <p><i>For sustainable economic growth to be truly successful it must be inclusive. This means removing barriers faced by economically inactive individuals, those with health challenges, and communities experiencing disadvantage.</i></p>	<ul style="list-style-type: none"> • Removing barriers to employment • Digital Inclusion
<p>Mission 3: Thriving Communities and Culture – “A sense of place and belonging”</p> <p><i>The county’s vibrant cultural and creative industries are integral to this identity and are a key focus for growth and support, particularly as a nationally recognised sector. Embracing these opportunities will be key to ensuring Gloucestershire remains vibrant, inclusive, and economically resilient.</i></p>	<ul style="list-style-type: none"> • Town/city centre strategies – including regeneration plans • Social value – support for local procurement • Local Visitor Economy Partnership
<p>Mission 4: Environment, Housing, and Infrastructure – “Building balance with nature”</p> <p><i>Long-term spatial planning and infrastructure delivery are critical to supporting growth in Gloucestershire. Well-planned, high-quality places not only facilitate economic growth but enhance health, wellbeing, and quality of life.</i></p>	<ul style="list-style-type: none"> • Spatial Plans – Strategic and Local • Transport connectivity improvements • Access to Nature • Digital connectivity
<p>Mission 5: Innovation, Investment & Enterprise – “From vision to value”</p> <p><i>Gloucestershire’s spirit of enterprise runs deep – rooted in a proud industrial and agricultural heritage and reimagined through a new generation of innovators, entrepreneurs, and change makers.</i></p>	<ul style="list-style-type: none"> • Business Support • Inward Investment • Alternative funding models

Together, we can shape a county that is **fairer, smarter, greener**, and even more extraordinary than it is today.

The five economic missions outlined in this plan will help us get there.

Gloucestershire



Appendix 2

Data presentation

Annual Economic Update

Kate Martin,
Data, Analysis and Insight team



Accountable



Integrity



Empower



Respect



Excellence





Mid-2047 766,595



17.46% + 113,929 people

Between mid-2022 and mid-2047

(Mid-2022 652,666)

Components of change



-7.11%

**Births – deaths
(natural change)**



+22.88%

**Internal
migration**



+3.47%

**International
migration**

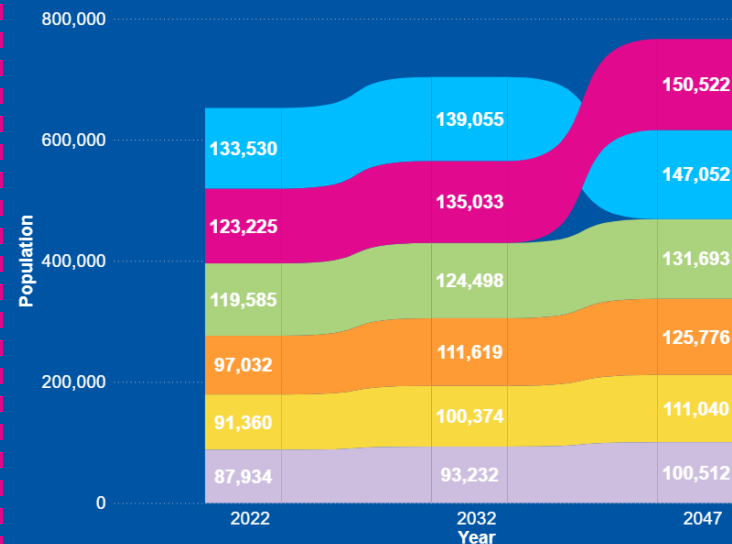


-1.73%

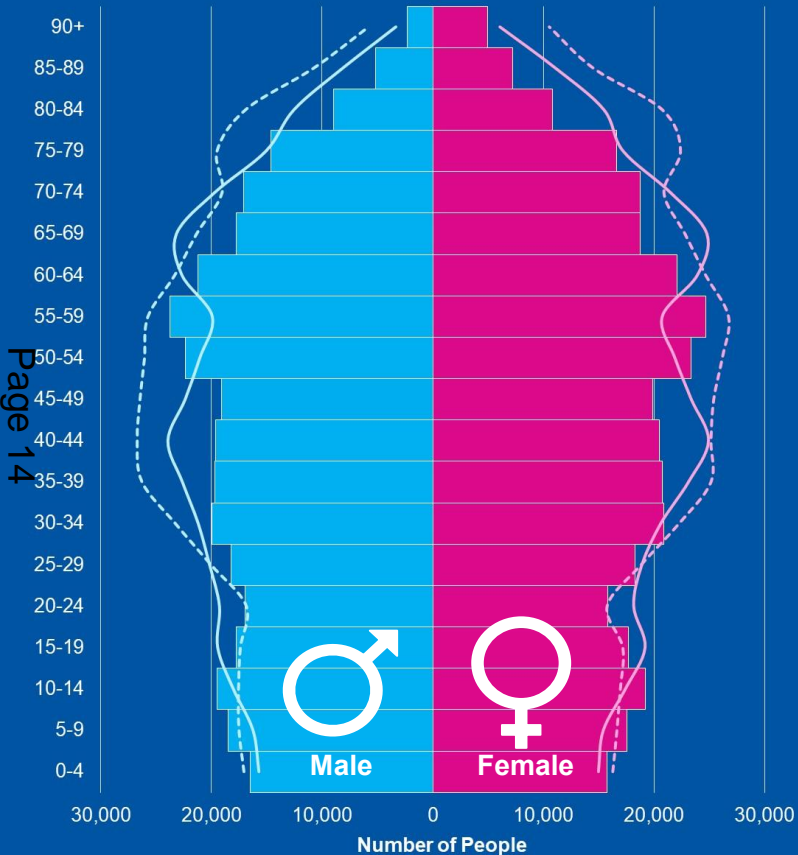
**Cross border
migration**

District lens

District ● Cheltenham ● Cotswold ● Forest of Dean ● Gloucester ● Stroud ● Tewkesbury



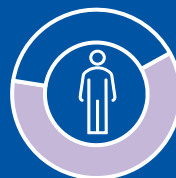
Gloucestershire Population Profile



■ Males 2022 ■ Females 2022 — Males 2032
— Females 2032 --- Males 2047 --- Females 2047

2022 based sub-national population projections (migrant category), ONS

Broad age groups 2022



4.73% decline in the number of 0-15 year olds, 2022-2047



14.47% increase in the number of 16-64 year olds, 2022-2047



Broad age groups 2047



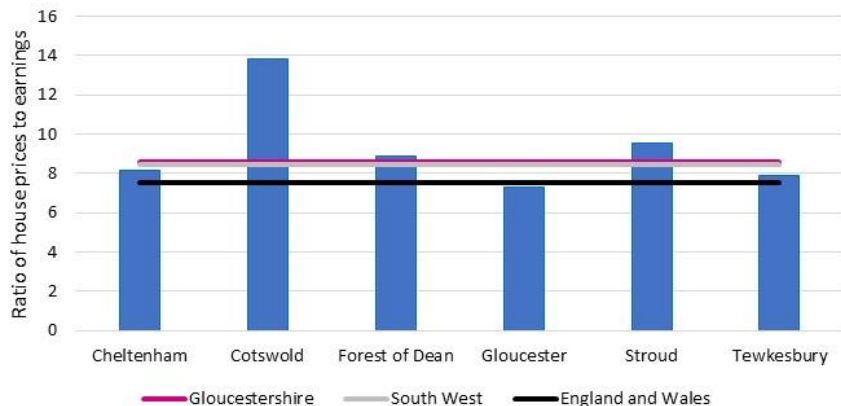
43.44% increase in the number of 65+ year olds, 2022-2047

Housing affordability



8.6 times earnings to buy
purchase a median priced property

Median house prices to median workplace earnings,
2024, Gloucestershire and districts



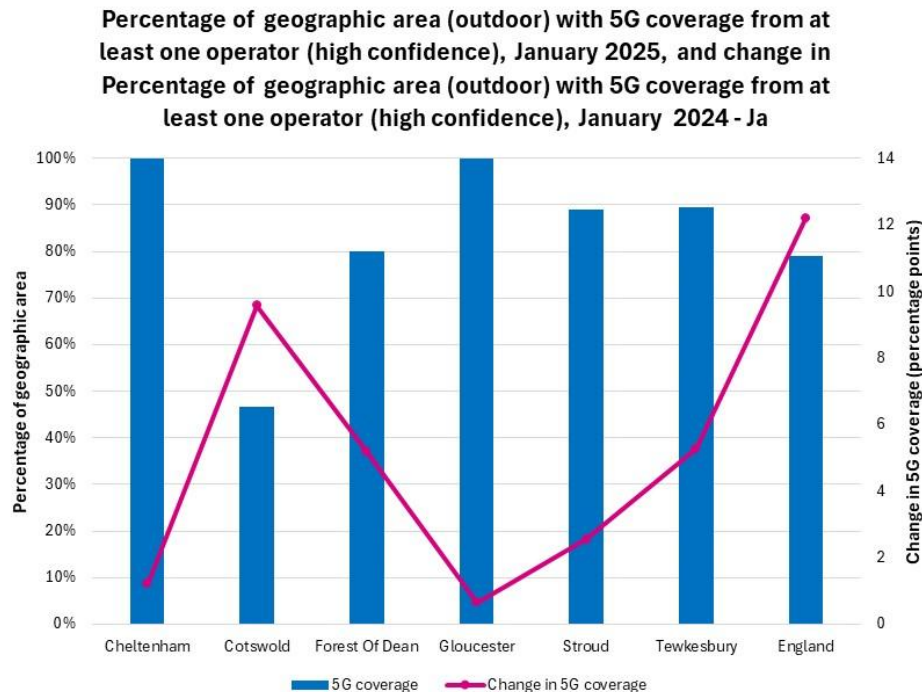
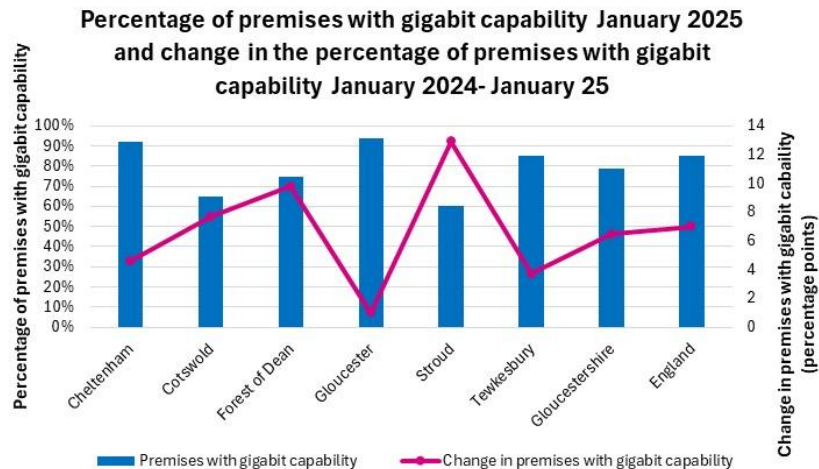
0.9 point fall in the ratio of
house prices to earnings
2023-2024

Average monthly rent June 2025 and change in average monthly
rents, June 2024-June 2025



Digital and Mobile connectivity

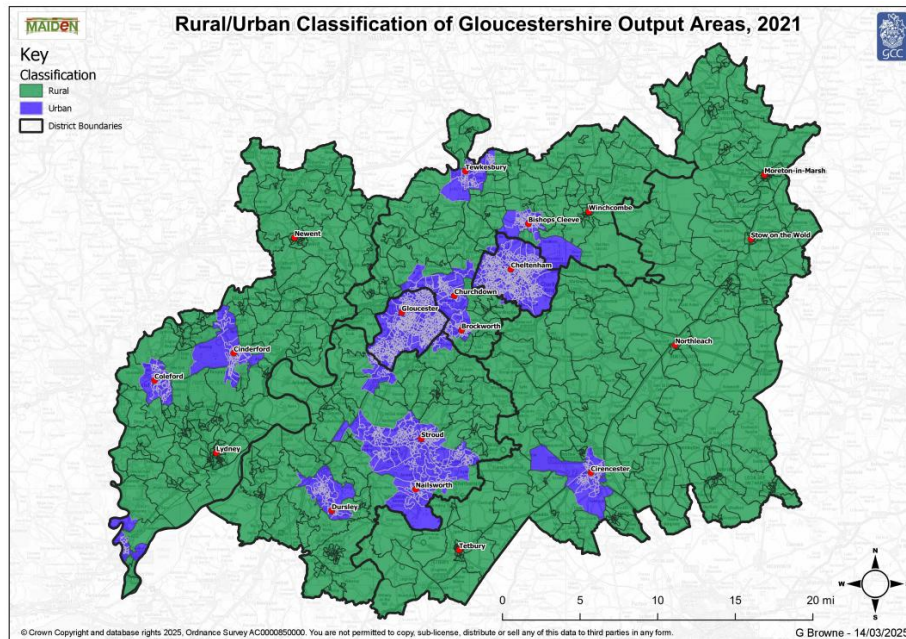
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79% of premises have gigabit capability, below the government target of 85%

Rural/urban (New data)

87.5% of the geographic area is classed as rural



Amongst the 20% most rural local authorities in the country

29.2% of the population live in rural areas

Rural areas have an older population



Employment

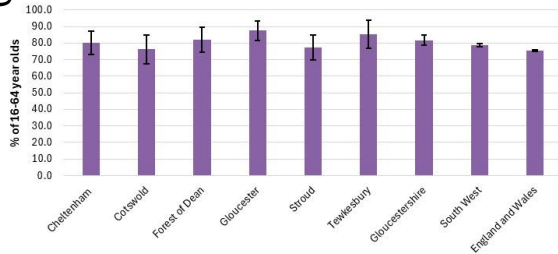
Employment, unemployment and economic inactivity



81.7% of 16-64 year olds in employment

higher than the national average

Employment rate, April 2024-March 2025, Gloucestershire districts



No significant change



2.0% of economically active 16-64 year olds are unemployed

lower than the national average

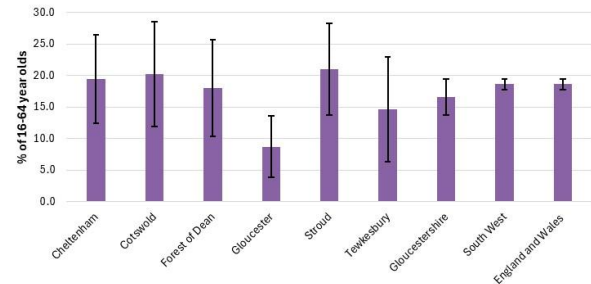
No significant change on previous year



16.6% of 16-64 year olds economically inactive

higher than the national average

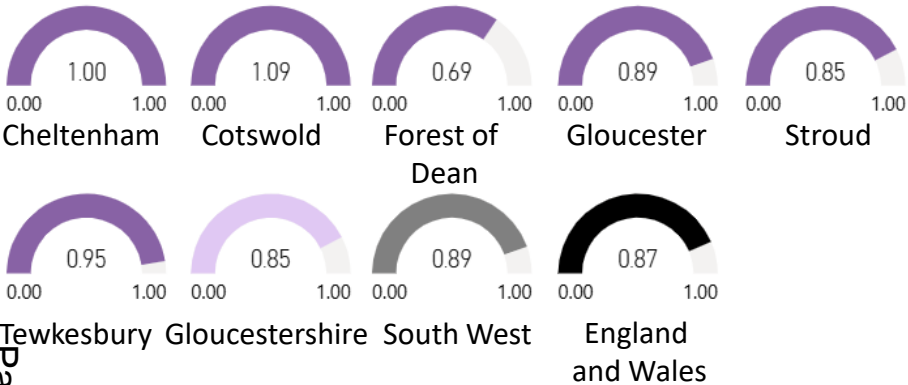
Economic inactivity rate, April 2024-March 2025, Gloucestershire districts



No significant change

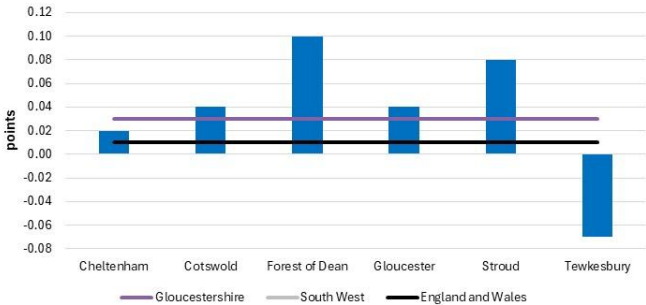
Jobs

Ratio of jobs to working age residents, 2023



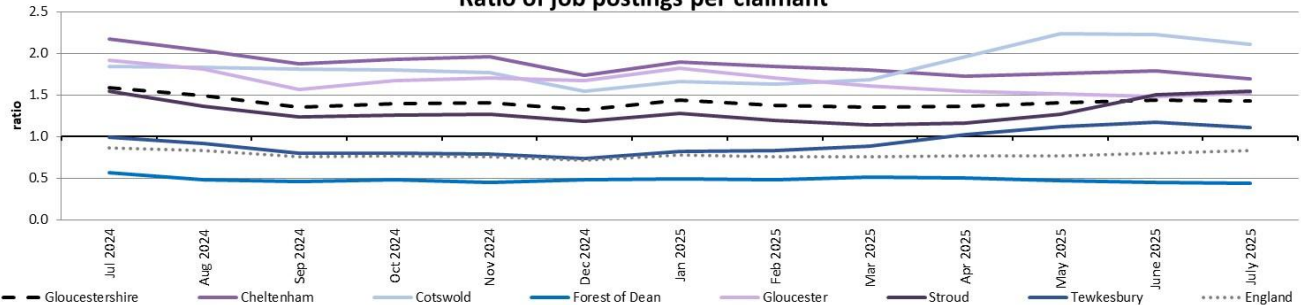
↑
increase on
previous
year

Change in job density ratio, 2022-2023, Gloucestershire districts



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Ratio of job postings per claimant



↓
decrease on
same month
previous year

Businesses



93.8% of businesses
survive one year
higher than the national average



57.6% of businesses
survive three years
higher than the national average

But survival rates are falling

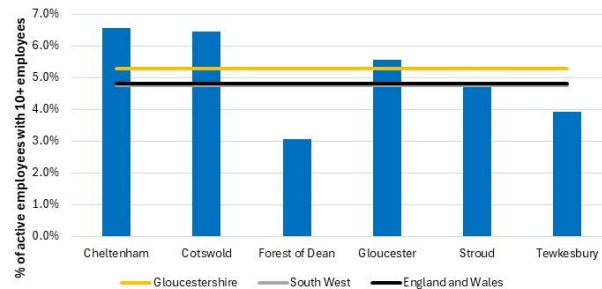


In 2023 business births
outnumbered business
deaths in
Gloucestershire

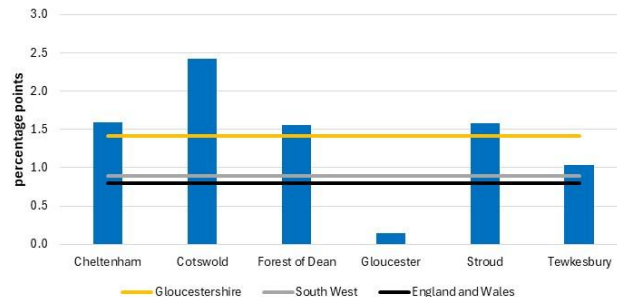


0.3% increase
in business floorspace
between
2022-2023
(higher than the national average)

High growth businesses as a percentage of active enterprises with 10+ employees, 2023, Gloucestershire districts



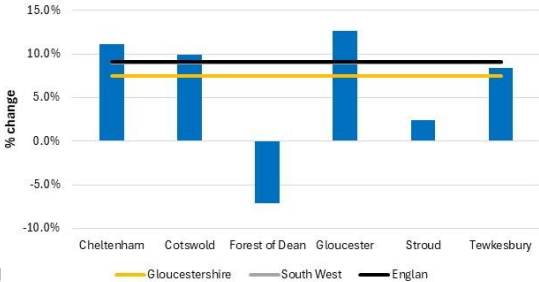
Change in high growth businesses as a percentage of active enterprises with 10+ employees, 2022-2023, Gloucestershire districts



GVA, productivity and exports

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Percentage change in GVA at current prices between 2022-2023, Gloucestershire districts

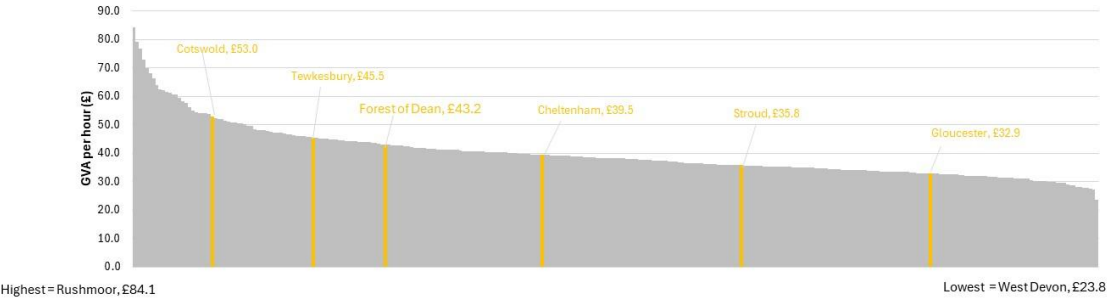


Lower growth in GVA



21.8% increase
in the value of exports
between 2021 and 2022
(higher than the increase seen
nationally)

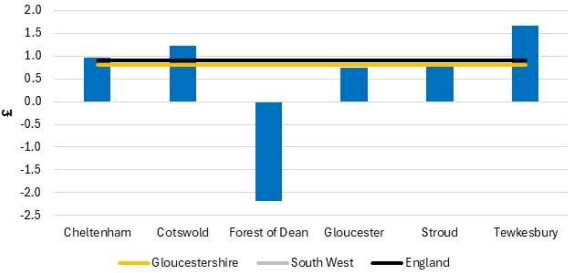
GVA per hour worked, Gloucestershire districts compared with 296 district and unitary authorities across England, 2023






GVA per hour worked
£40.80


Change in GVA per hour worked, 2022-2023, Gloucestershire districts




Living our values every day




Accountable



Integrity



Empower



Respect



Excellence

Regional gross value added (balanced) by industry, ONS
Sub regional productivity, ONS
International trade in UK nations, regions and cities, ONS

