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2.0.1 Cotswold District has a population of about 84,000 spread over an area of 450 sq. miles (1,165 sq. km). Although very rural, the District lies in close proximity to large urban areas – notably Swindon, Gloucester and Cheltenham and, further afield, Oxford, Bristol, Bath, Birmingham and Coventry.

Natural and Historic Environment

2.0.2 The Cotswolds is internationally renowned for its natural beauty. The distinctive local building stone, used in the construction of the many magnificent historic buildings, is a hugely important part of the character that makes the Cotswolds a famous tourist destination. The interplay between the built and natural environment is a defining characteristic throughout the District, especially within the Cotswolds Area of Outstanding Natural Beauty (AONB).

2.0.3 The distinctive heritage includes its numerous market towns and villages and their settings, as well as individual heritage assets.

2.0.4 The quality of the District's built and natural environment is reflected in the high number of environmental and heritage assets (both designated and non-designated). These include:

- 80% of the District is within the Cotswolds AONB (a greater coverage by a national landscape designation than any other District in England);
- 144 Conservation Areas (more than any other District in England);
- 4,991 entries on the statutory list of buildings of special architectural and historic interest (second after City of Westminster);
- 239 Scheduled ancient monuments;
- 32 registered historic parks and gardens;
- 37 Sites of Special Scientific Interest;
- Over 260 locally designated Key Wildlife Sites;
- 1 registered battlefield.



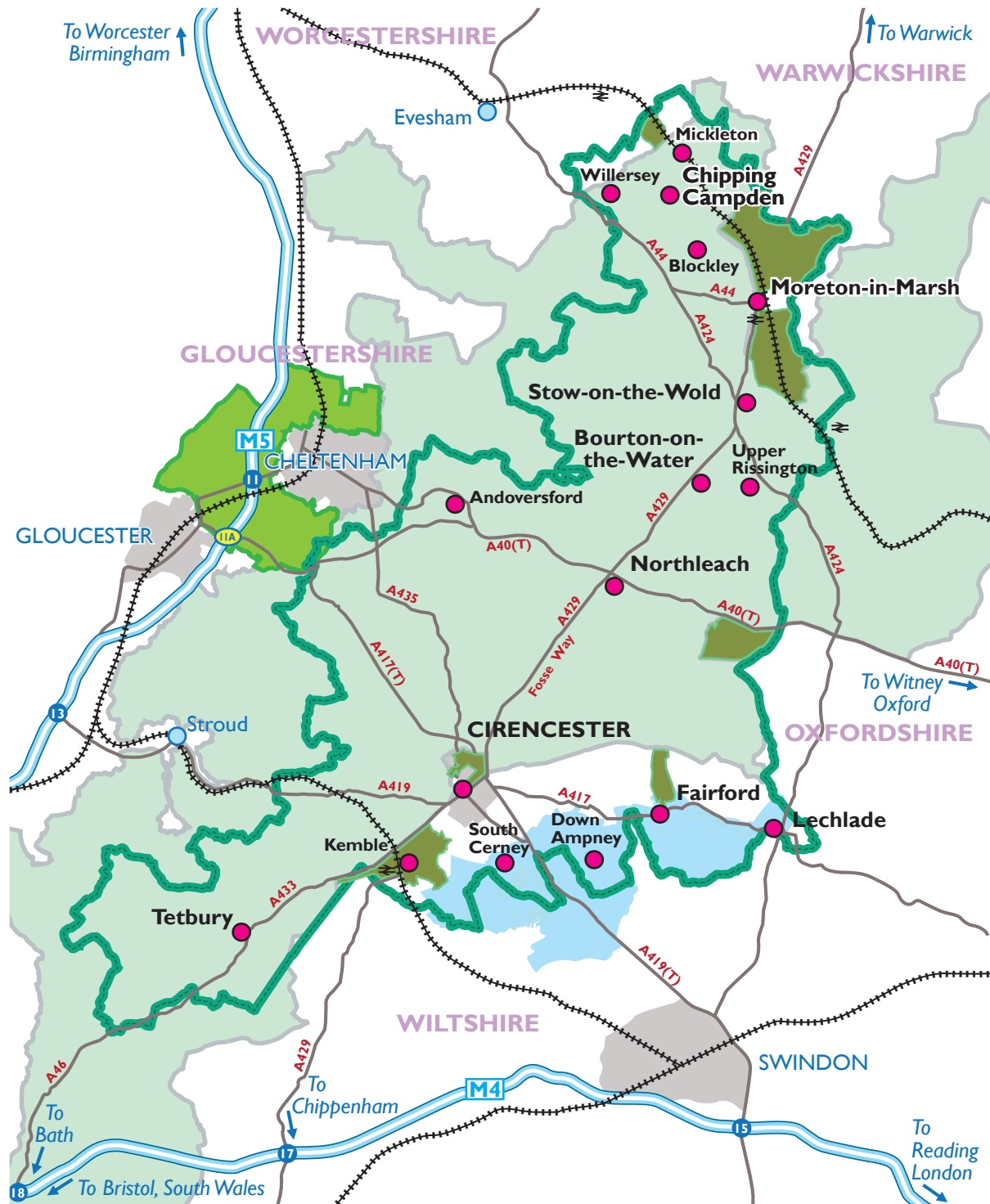
Moreton-in-Marsh

2.0.5 In the south of the District, beyond the AONB, the Cotswold Water Park (CWP) is the largest area of man-made lakes in the UK, covering an area of 40 sq. miles (33 sq. miles in Cotswold District). The CWP has evolved from major sand and gravel extraction of the upper Thames valley, which is on-going and likely to continue for the foreseeable future. The area is important for nature conservation, while also providing a major resource for tourism, notably water recreation. Nearly 960 holiday homes have been granted planning permission in the Cotswold part of the CWP.

2.0.6 A small area of the Cheltenham and Gloucester Green Belt spills over into the District at Ullenwood in Coberley parish. This area is also within the Cotswolds AONB designation.

Key Diagram

Cotswold District and surrounding areas



Key

- Principal Settlements
- Cotswold District Boundary
- Special Landscape Area
- Cotswold Water Park
- Area Of Outstanding Natural Beauty
- Green Belt

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Population and Housing

2.0.7 Household growth between 2001 and 2011 was 5.3% in Cotswold District (England 7.9%) whilst population growth at 3.1% has been slower. This is leading to a decrease in the average household size. Factors influencing the growth in household numbers include the number of older people living longer as well as family breakdown.

2.0.8 The District has a high proportion of elderly people and a low proportion of children and young people. It also has the lowest population density, by far, of any of the districts in Gloucestershire⁽¹⁾.

2.0.9 While most residents in the District enjoy a good quality of life, many live in places that lack good access to services, facilities, training and education. This presents problems for those who rely on public transport, particularly young and elderly people.

2.0.10 The attractiveness of the area has inevitably brought pressures for housing growth. In the north of the District these have been driven, since the 1960s, by commuting to the West Midlands. However, movement out of London and the south-east has made the Cotswolds particularly attractive for retirement and holiday or second homes. Some of these properties are occupied only at weekends, or for occasional holidays. The 2011 Census indicated that 9.3% of dwellings in the Cotswold District had no usual resident household because they were second homes; vacant dwellings; or buildings with short term occupation used by visitors. On 1st April 2014 there were 691 empty properties in the district, of which 218 were long-term⁽²⁾.

2.0.11 Although the area has high property values, the median earned income of full-time employees in the Cotswold District is £26,933, which is £500 higher than the average Gloucestershire income though lower than Stroud and Cheltenham. The median income of all employees (both full-time and part-time employees) is £19,131, the lowest of all districts in Gloucestershire⁽³⁾. Consequently, significant sections of the community experience social and financial deprivation, particularly access to housing. The problem is exacerbated by private sector rents rising faster than earnings across the county⁽⁴⁾. The affordability of homes has worsened since the previous District Housing Needs Assessment was published in 2010 (HNA 2010), while the ratio of house price to earnings in the District worsened from 10.88 in 2009 to 11.15 in 2013⁽⁵⁾.

1 www.gloucestershire.gov.uk

2 CDC Housing Strategy – sourced from a report run of Council tax records

3 Annual Survey of Hours and Earnings, residents based analysis of full time employees at 2014. Employees are those defined as employed persons and do not include people who are self-employed, www.nomisweb.co.uk

4 Gloucestershire SHMA Update March 2014 www.cotswold.gov.uk

5 DCLG Live Table 576: Ratio of lower quartile house price to lower quartile earnings by District

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Local Economy

2.0.12 Each of the larger Cotswold towns has a strong and distinctive role. However, Cirencester is by far the most dominant centre with about a quarter of the District's population (nearly 20,000) and over 30% of jobs (around 13,500) based in the town⁽⁶⁾. This is the key location for business services, finance, retail and public services.

2.0.13 Moreton-in-Marsh is regarded by many as the main centre for the north Cotswolds, while Bourton-on-the-Water, Chipping Campden, Fairford, Lechlade, Northleach, Stow-on-the-Wold and Tetbury perform the role of service centres for surrounding rural areas. Smaller local service centres exist at Andoversford, Blockley, Down Ampney, Kemble, Mickleton, South Cerney and Willersey. Elsewhere, rural services are relatively sparse and generally declining.



Stow-on-the-Wold

2.0.14 A striking point about the District's main service centres is their relatively even geographical distribution, with each of them serving a significant catchment of smaller settlements. Many of these historic market towns and larger villages have developed at points along the Fosse Way - a major route running between the south-west and the north of the District.

2.0.15 There is a range of employment land and premises in most of the larger market towns and villages, although provision at Lechlade, Northleach and Stow-on-the-Wold is limited. Despite poor broadband coverage throughout much of the District, the economy has a strong representation of small businesses and a reasonably diverse economic base⁽⁷⁾. These businesses make a significant contribution to the economic well-being of the District, offer local employment opportunities, and has made the area fairly resilient to fluctuations in the national and global economies. Unemployment rates remain relatively low.

2.0.16 In 2011, almost 8,000 people (13.3%) worked from home in Cotswold. This rate is double the national average and significantly higher than Gloucestershire's average of 8.5%⁽⁸⁾. This is partly due to the rural nature of the District and a highly skilled and entrepreneurial workforce.

2.0.17 There is significant "leakage" of comparison (non-food goods) shopping trips to other centres outside the District⁽⁹⁾.

6 ONS Census 2011 Office for National Statistics and Business Register and Employment Survey Office for National Statistics Data to 2013: www.nomisweb.co.uk

7 Inter Departmental Business Register (ONS): www.nomisweb.co.uk

8 ONS Census 2011 Office for National Statistics - Nomis Homeworking by age and industry: www.ons.gov.uk

9 Cotswold Retail Study Update (December 2016)

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2.0.18 The wholesale and retail trades represent the largest employment group in the District (17.3%). The next largest groups are education (10.7%) and health and social work activities (8.3%). Cotswold has an above average proportion of residents working in agriculture, forestry and fishing, accommodation and food services, and professional, scientific and technical activities. The service sector accounts for the largest proportion of local jobs, with tourism being a major and growing part of the local economy⁽¹⁰⁾. There are a number of large businesses including Campden BRI, St. James's Place, the Fire Service College, and educational institutions, notably the Royal Agricultural University, which offer opportunities for higher value growth.

2.0.19 The economically active population is, however, declining across the District, and the labour market is considered tight by local businesses with labour supply issues, particularly in the professional, skilled trades and engineering sectors, potentially impacting on economic growth⁽¹¹⁾.

2.0.20 Demand enquiries for employment land/premises particularly from small, knowledge-based businesses, who want to secure a quality environment or a site for an existing local business, tend to be focussed upon Cirencester and established business parks. The loss of employment land to housing development has reduced opportunities for employment growth in some areas; for example, at Tetbury 9.11 hectares of employment land has been lost to residential / care home development since 2011.

Transport

2.0.21 In 2011, almost 14,000 residents commuted out of the District; many using the area as a rural base from which to commute to larger employment centres, notably Swindon, Cheltenham and Gloucester, where there are higher value jobs. Conversely, almost 16,000 commuted into the District, an increase of around 5,000 since 2001⁽¹²⁾. Over 16,300 Cotswold residents also work in the District, excluding homeworkers and people with no fixed working location. Given the rural nature of the area, average travel-to-work times are longer than in most other parts of the County.



Kemble Railway Station

2.0.22 Much of the District has good road links, with easy access to the motorway network via A-class routes, although this does not apply to the northernmost parishes. The 'missing link' section of the A417(T) between the Brimpsfield roundabout and Brockworth bypass is a major bottleneck, which badly delays access to and from the M5 motorway at peak times.

10 Business Register and Employment Survey Data. Office for National Statistics: www.nomisweb.co.uk

11 The District's resident skills base is polarised: 35% of the population has a degree level qualification and above; whereas 26% of the population have no qualification or level 1 qualification.

12 2011 Census

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The District is served by just two railway stations, at Kemble (on the Swindon-Gloucester line) and Moreton-in-Marsh (on the Oxford-Worcester line). Kingham and Honeybourne stations lie just outside the District boundary to the east and north respectively.

Climate Change and Flood Risk

2.0.23 Parts of the District are vulnerable to the impacts of climate change, including flooding. The area at greatest flood risk is the upper Thames valley, which includes the Cotswold Water Park (CWP), although some other settlements such as Bourton-on-the-Water, Cirencester and Moreton-in-Marsh have also been affected. The flooding experienced in the District in 2007, late 2012 and early 2013 highlighted the additional risk to both existing and new properties of sewer flooding.