
Stroud District

Settlement Role and Function Study

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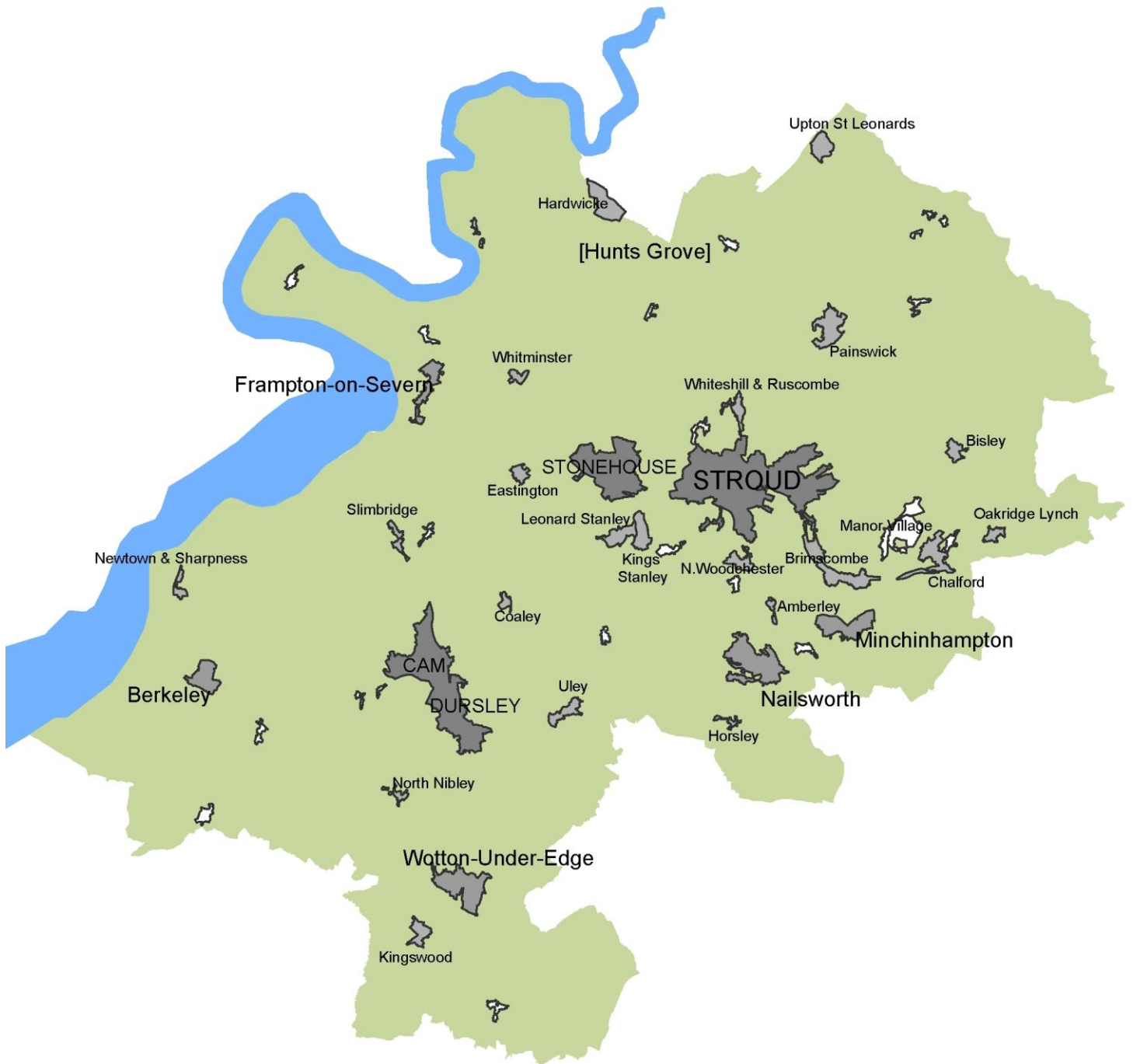


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Settlements in Stroud District



- Settlements included in this study:**
 Settlements classified in tiers 1-3 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Settlements excluded from this study:**
 Small settlements classified in tiers 4 or 5 of the Stroud District settlement hierarchy (Local Plan policy CP3).

Settlements included in this study:

Amberley
 Berkeley
 Bisley
 Brimscombe
 Cainscross (part of Stroud)
 Chalford
 Coaley
 Dursley
 Eastington
 Frampton-on-Severn
 Hardwicke
 Horsley
 (Hunts Grove)
 Kings Stanley
 Kingswood
 Leonard Stanley
 Manor Village (Bussage)
 Minchinhampton
 Nailsworth
 Newtown & Sharpness
 North Woodchester
 Oakridge Lynch
 Painswick
 Rodborough (part of Stroud)
 Slimbridge
 Stonehouse
 Stroud
 Uley
 Upton St Leonards
 Whiteshill
 Whitminster
 Wotton-Under-Edge

Smaller settlements not included in this study:

Arlingham
 Box
 Brookthorpe
 Bussage
 Cambridge
 Cranham
 Eastcombe
 France Lynch
 Haresfield
 Hillesley
 Longney
 Middleyard
 Newport
 Nymphsfield
 Randwick
 Saul
 Selsley
 Sheepscombe
 South Woodchester
 Stinchcombe
 Stone
 Thrupp

1. Purpose and scope of this Study

- 1.1 The Stroud District Local Plan identifies 54 settlements within the District and defines a boundary (or 'development limit') for each, within which the *principle* of development is broadly accepted ¹. The Plan focuses on identifying those settlements that offer the best opportunities for sustainable development. The identification of these settlements originated with the Council's 1985 Rural Settlements Policy Appraisal, which ascertained the level of services and facilities in towns and villages across the District. A review of this appraisal was carried out in 2010 and a further update was published in 2013, to inform the drafting of a settlement 'hierarchy' to be included in the development strategy of the new emerging Local Plan.
- 1.2 One of the primary aims of establishing a settlement hierarchy is to promote sustainable communities by bringing housing, jobs and services closer together in an attempt to maintain and promote the viability of local facilities and reduce the need to travel to services and facilities elsewhere.
- 1.3 The main purpose of this study is to build up a picture of the District's settlements and how they function. By bringing together existing evidence from a range of sources, the study aims to produce a baseline picture, which can be used to aid the identification of needs, issues and opportunities within and affecting the District's settlements, and to inform the development of policies and proposals that will shape their future.
- 1.4 Whilst the definition of a settlement hierarchy, the mapping of their physical 'development limits' and the drafting of policies to manage development in and around them are all functions of the local planning process, it is hoped that this study will provide a useful and informative tool for all policy makers and decision makers involved in delivering services to communities, both within the Council and beyond – including communities undertaking Neighbourhood Plans.

Scope of study and methodology

- 1.5 This is a desk-based study, which refers to and analyses existing evidence and readily-available data.
- 1.6 Rather than undertaking a study of all 54 of the District's identified settlements, the scope has been limited to the larger, more complex and broadly more sustainable settlements. The most straight-forward way of defining the scope was to use the draft settlement hierarchy that is set out in the emerging Local Plan (the Submission Draft version) and simply to focus on the 32 settlements listed within the top three tiers of the hierarchy. The smaller settlements listed in tiers four and five have not been included in the study.
- 1.7 The study has undertaken statistical analysis within four main topic areas, with the aim of producing a 'profile' of the settlements, identifying their main roles, how they function now and how this might change in the future:
 1. Population and housing:
 - Providing an indication of the scale of each settlement and where it lies within a District-wide 'hierarchy'
 - Analysis of the demographic characteristics of each settlement
 - Analysis of historic growth rates (housing supply)

¹ There are many small settlements and hamlets across the District that are not 'defined' by the Local Plan and which do not have a boundary

- Identifying potential pressure for future growth, factors that may influence demand and inhibit or enable growth, and possible impacts on the function of particular settlements

2. Employment role:

The scale, type and location of existing employment provision, concentrations of economically active people and potential future economic growth will have a strong bearing on the sustainability of settlements.

- Identifying settlements with a strong employment role in terms of the number of jobs provided locally
- Levels of economic activity and size of working-age population in each settlement
- Identifying which settlements are net importers of workers and which are net exporters: which settlements have a 'dormitory' role?
- The characteristics of the local employment offer, in terms of industry sectors
- A comparison of the local resident workforce with the local jobs supply
- Employment growth projections – how and where might the economy grow in the future?

3. Travel to work and access to services and facilities:

Self-containment is a key sustainability consideration with regard to settlement role and function. Settlements which offer people the opportunity to live and work close together, and which provide the best access to vital services and facilities, operate in the most sustainable way.

- Analysis of travel-to-work patterns, both for working residents and for those coming in to work in our settlements
- Comparative assessment of how easy it is to access key services and facilities, both within settlements and elsewhere (in terms of travel times and mode of transport)

4. Retail and community facilities/services:

- Broad identification of the location, scale and diversity of retail facilities
- Identify those settlements with a 'strategic' retail role (serving a wide catchment of surrounding communities with an extensive retail offer) and those with a 'local' role
- Broad identification of the location, scale and diversity of community facilities and key services
- Identify those settlements with a 'strategic' role in providing services and facilities to communities across the District, and those with a more limited 'local' role

1.8 The data used for desk-based analysis came from a variety of sources, including:

- National statistics, in particular Census data from 2011 (and 2001). Sourced from the Office of National Statistics (ONS), particularly the 'Neighbourhood Statistics' function and NOMIS (which provides official labour market statistics).
- MAIDeN and Inform Gloucestershire, which are sources of data about the County.
- The Council's own evidence studies:
 - *Stroud District Housing Land Availability reports* (HLA) – annual monitoring reports on housing supply, planning permissions and completions
 - *Stroud District Employment Assessment Review* (BE Group, November 2014): including employment (workforce) growth projections by industry sector (Oxford Economics, 2014)
 - *Stroud District Rural Settlement Classification* study (2010) and Update (2013)
 - *Stroud District Town Centres and Retailing Study* (GVA Grimley, 2010) and Update (2013)

- 1.9 Much of the data in this study is presented in tabular form. Most of these tables have a common format, either presenting the figures for each settlement in a colour-coded ranking of highest to lowest (as exemplified by the ‘key’ shown below left); or comparing percentages for each settlement to the District average (as in the ‘key’ shown below right).

Largest	Population 20,000+
V. Large	Population 7,000 – 10,000
Large	Population 4,000 – 6,999
Large	Population 2,000 – 3,999
Medium	Population 1,000 – 1,999
Medium	Population 700 - 999
Small	Population 500 – 699
Smallest	Population less than 500

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

- 1.10 Statistics for each settlement have generally been aggregated from figures relating to either ‘Lower Super Output Areas’ (LSOA) or ‘Middle Super Output Areas’ (MSOA). These are geographical areas, defined by the ONS as a means of presenting localised census data in a consistent way (rather than by parish or ward, the boundaries of which are more prone to change and the scale of which is inconsistent). These geographies are also used to present a range of other national statistics, including labour statistics and indices of deprivation.
- Output Areas (OAs): these are the smallest census output areas, with a minimum size of 100 residents and 40 households
 - Lower Super Output Areas (LSOAs) are aggregations of OAs. They have a minimum size of 1,000 residents and 400 households
 - Middle Super Output Areas (MSOAs) are aggregations of LSOAs, with a minimum size of 5,000 residents and 2,000 households
- 1.11 Most of the statistical data used in this report is available at LSOA level. Because almost all LSOAs and most MSOAs do not correspond exactly with individual settlement boundaries (and many cover more than one settlement and/or surrounding rural land), it is rarely possible to attribute figures precisely to specific settlements. Instead, totals (or averages) for each settlement have been *estimated* by aggregating the figures for all the LSOAs (or MSOAs) that cover/sit within each settlement boundary. **They must therefore be viewed as indicative, rather than factually exact.** Some of the larger settlements are exceptions to this rule, though: the LSOA and/or MSOA boundaries around Stroud, Stonehouse, Cam and Dursley correspond quite closely to their settlement boundaries. Therefore the data can reliably be attributed to these settlements, without the need to aggregate or estimate. Please refer to APPENDIX 2 and APPENDIX 3 for further details of the methodology used.
- 1.12 Finally, it should be stressed that the data used in this report is “policy off” i.e. forecasts do not take account of future policy decisions, for example, to locate future development at certain settlements. The study provides an indication of the baseline picture for each settlement and it is for policy makers to determine the actions required to meet needs, address issues and realise opportunities in the future.

2. Settlement size – a simple hierarchy

Which are the District's largest settlements, in terms of resident population and number of homes? Which settlements might see particular pressure to grow, and how might they be affected by demographic change over the Plan period?

2.1 Settlement size: resident population

- 2.1.1 The simplest kind of settlement 'hierarchy' is a ranking from largest to smallest in terms of population size. Population size can be a significant indicator as to the diversity and complexity of a particular settlement's role(s) and function(s).
- 2.1.2 However, as this study will show, a certain population level does not necessarily guarantee a relative degree of functionality: the way that a particular settlement functions can be affected by spatial issues, such as its proximity to neighbouring settlements or access to transport.
- 2.1.3 Even a settlement's demographic make-up (the proportion of people of different ages who live there) can be revealing when it comes to looking at how the place functions. For example, a settlement with a high proportion of working-age adults (compared to other age groups) may be a good indication of its employment role and function: it may have a relatively high rate of economic activity; it may either be a settlement with a high concentration of jobs or be somewhere that provides easy access to other employment 'hubs'. There may be a correspondingly high proportion of children and young people living there, as it may be a place that is attractive to working families. Conversely, a place with a very high proportion of older people might see a low rate of economic activity: there are likely to be more retirees amongst the resident population.
- 2.1.4 These factors can affect the way that a settlement functions, just as much as its scale. And this can tend to be self-perpetuating: a settlement's facilities and characteristics will tend to attract certain types of people; who will in turn demand and sustain particular facilities and characteristics.
- 2.1.5 As **Table 1** shows, **Stroud** (the District's principal town) has by far the largest population of all settlements in the District. **Cam** is the next largest individual settlement, but with a population of 8,000+ it is not in the same league as Stroud. However, **Cam** and **Dursley** are adjacent settlements and their combined population (14,800+) makes this a really significant conurbation and an important second focus for the District.
- 2.1.6 The District's major population masses are at:
- Stroud (pop. 25,118)
 - Cam & Dursley (pop. 14,859)
 - Stonehouse (pop. 7,725)
 - Nailsworth (pop. 5,803)
 - Wotton Under Edge (pop. 4,889)

Key to table 1

Largest	Population 20,000+
V. Large	Population 7,000 – 10,000
Large	Population 4,000 – 6,999
Large	Population 2,000 – 3,999
Medium	Population 1,000 – 1,999
Medium	Population 700 - 999
Small	Population 500 – 699
Smallest	Population less than 500

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

Table 1: Resident population and demographic make-up of each settlement

Settlements in the Hierarchy (CP3)	Population count. All persons 2011 ²	Children and young people		Working age adults		Retirement age adults	
		Number of people aged 0-19	Proportion of total population aged 0-19	Number of people aged 20-64	Proportion of total population aged 20-64	Number of people aged 65 +	Proportion of total population aged 65 +
Stroud District Totals / Average :	112,779	25,955	23%	64,847	58%	21,977	19%
Stroud	25,118	5,930	24%	14,973	59%	4,139	16%
Cam	8,162	1,765	22%	4,593	56%	1,804	22%
Stonehouse	7,725	2,001	26%	4,443	57%	1,281	17%
Dursley	6,697	1,612	24%	3,928	59%	1,157	17%
Nailsworth	5,803	1,349	23%	3,375	58%	1,082	19%
Wotton Under Edge	4,889	1,127	23%	2,780	57%	982	20%
Hardwicke	3,936	921	23%	2,523	64%	492	13%
Minchinhampton	3,462	704	20%	1,759	51%	999	29%
Chalford	2,923	779	27%	1,601	55%	542	19%
Manor Village	2,803	718	26%	1,682	60%	403	14%
Painswick	2,413	447	19%	1,186	49%	780	30%
Brimacombe	2,370	538	23%	1,371	58%	460	19%
Berkeley	2,027	406	20%	1,209	60%	413	20%
Eastington	1,579	350	22%	916	58%	312	20%
Kings Stanley	1,539	316	21%	874	57%	348	22%
Leonard Stanley	1,442	305	21%	797	55%	341	24%
Frampton on Severn	1,430	338	24%	837	58%	255	18%
Newtown/Sharpness	1,412	308	22%	851	60%	253	18%
Kingswood	1,389	379	28%	777	56%	227	16%
Whiteshill & Ruscombe	1,153	275	24%	650	56%	228	20%
Upton St Leonards	1,138	258	23%	648	57%	232	20%
Uley	1,131	241	21%	637	56%	253	23%
Whitminster	890	193	22%	526	59%	170	19%
Slimbridge	795	169	21%	454	57%	173	22%
Bisley	750	143	19%	405	54%	202	27%
Coaley	635	133	21%	358	56%	145	23%
North Woodchester	635	133	21%	334	53%	168	26%
North Nibley	567	130	23%	299	53%	139	24%
Oakridge Lynch	536	102	19%	289	54%	144	27%
Amberley	529	111	21%	278	53%	140	26%
Horsley	406	99	24%	232	57%	75	18%

² Census 2011. Totals for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

2.2 Population growth and changing demography

- 2.2.1 Why do populations grow? This is a hugely complex subject but, put simply, it is a combined effect of births, deaths and life expectancy, plus levels of in-migration and out-migration.
- 2.2.2 But what is behind Stroud's population growth? Whilst birth rates and death rates do play their part, recent trends show that much of our District's growth has been due to in-migration (people moving in to the District), and that an unusually high proportion of this in-migration is comprised of people aged 65 and over, who have come here to retire. This contrasts with elsewhere in the County: in Gloucester and Cheltenham, for example, where most in-migration consists of working age adults.
- 2.2.3 This trend is projected to continue in the future. Combined with the effects of improvements in life expectancy and the effects of recent and future birth rates, this means that our District's population is projected to grow by 12% between 2011 and 2031 (an increase of some 13,000 people). These projections are based on an assumption that recent trends will continue. The projections do not take account of possible future changes to the local or national economy, which might affect in- or out-migration, nor the effects of any possible development that might attract additional residents to the District/a particular locality*.

*** NOTE:**

It must be emphasised that the analysis of population growth and changing demography over the following pages is 'raw': it is based on national statistics (ONS 2012 population projections) which are trend-based projections, unmanipulated and uncorrected to take account of local conditions and known influences. More sophisticated projections for the District as a whole are included within the October 2014 report commissioned by the Council into the Objectively Assessed Housing Needs of Stroud, Forest of Dean and Cotswold (NM Strategic Solutions).

Key to Table 2

Largest	Population 20,000+
V. Large	Population 7,000 – 10,000
Large	Population 4,000 – 6,999
Large	Population 2,000 – 3,999
Medium	Population 1,000 – 1,999
Medium	Population 700 – 999
Small	Population 500 – 699
Smallest	Population less than 500

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	= the Stroud District average
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Table 2(a): Settlement size and projected growth

Settlements in the Hierarchy (CP3)	Population count. All persons 2011 ³	Projected population. All persons 2031 ⁴ (rounded to 10)	
Stroud District Totals / Average :	112,779	126,200	
Stroud	25,118	27,640	=
Cam	8,162	9,270	=
Stonehouse	7,725	8,510	=
Dursley	6,697	7,400	=
Nailsworth	5,803	6,460	=
Wotton Under Edge	4,889	5,490	=
Hardwicke	3,936	4,220	=
Minchinhampton	3,462	4,090	=
Chalford	2,923	3,260	=
Manor Village	2,803	3,050	=
Painswick	2,413	2,900	=
Brimscombe	2,370	2,650	=
Berkeley	2,027	2,280	=
Eastington	1,579	1,770	=
Kings Stanley	1,539	1,750	=
Leonard Stanley	1,442	1,650	=
Frampton on Severn	1,430	1,580	=
Newtown & Sharpness	1,412	1,560	=
Kingswood	1,389	1,530	=
Uley	1,131	1,290	↑
Whiteshill & Ruscombe	1,153	1,290	↓
Upton St Leonards	1,138	1,280	↓
Whitminster	890	990	=
Slimbridge	795	900	=
Bisley	750	880	=
North Woodchester	635	740	=
Coaley	635	720	=
North Nibley	567	660	=
Oakridge Lynch	536	630	=
Amberley	529	620	=
Horsley	406	450	=

Table 2(b): projected population increase

Settlements in the Hierarchy (CP3)	Projected population increase ⁵ 2011-2031 (rounded to 10)	% increase on 2011 population
Stroud District Totals / Average :	13,421	12%
Stroud	2,520	10%
Cam	1,110	14%
Stonehouse	790	10%
Dursley	700	10%
Nailsworth	660	11%
Minchinhampton	630	18%
Wotton Under Edge	600	12%
Painswick	490	20%
Chalford	340	12%
Hardwicke	290	7%
Brimscombe	280	12%
Berkeley	250	12%
Manor Village	250	9%
Leonard Stanley	210	15%
Kings Stanley	210	14%
Eastington	190	12%
Uley	160	14%
Frampton on Severn	150	11%
Newtown & Sharpness	150	11%
Upton St Leonards	140	12%
Whiteshill & Ruscombe	140	12%
Kingswood	140	10%
Bisley	130	17%
North Woodchester	110	16%
Slimbridge	100	13%
Whitminster	100	11%
Amberley	90	16%
Oakridge Lynch	90	17%
North Nibley	90	15%
Coaley	90	14%
Horsley	50	11%

³ Census 2011. Totals for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

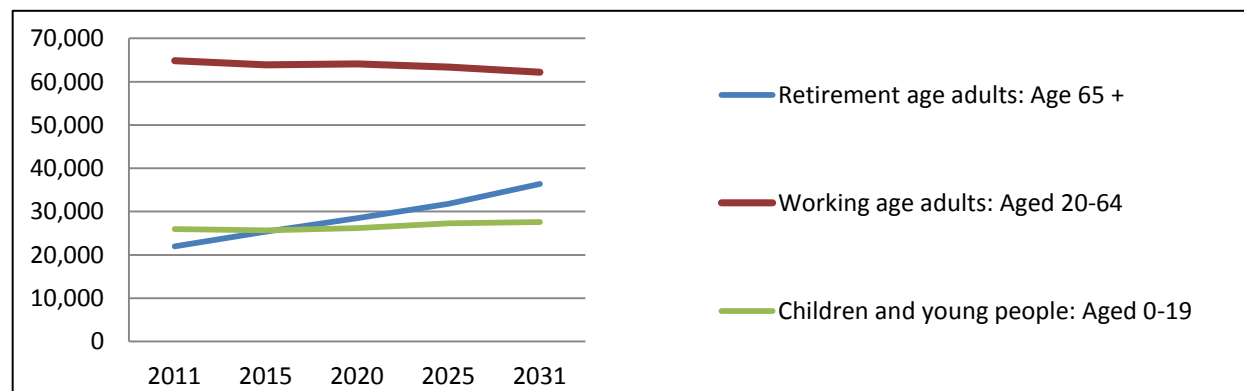
⁴ These figures have been calculated by applying ONS 2012 population projections to 2011 census data about population and demographic make-up in each of the District's LSOAs. They must therefore be viewed as indicative rather than factually exact.

⁵ Based on subtracting the 2011 (census) population from the 2031 projected population, as above.

- 2.2.4 As a broad trend, the fastest growth (in terms of percentage increase in population from 2011 to 2031) seems to be predicted for those settlements that had the highest proportion of residents aged 65+ in 2011.
- 2.2.5 Based on current trends (birth rates, death rates, patterns of in- and out-migration), it is predicted that the District's population will age significantly. Across the District as a whole, it is thought that there will be growth of 12% between 2011 and 2031. However, this level of growth will not be spread evenly across all age bands:
- The number of children and teenagers (aged 0-19) will increase by around 6.3% (around 1,650 more people in 2031), but as a proportion of the overall population this group will remain fairly level (22%);
 - The number of working-age adults (aged 20-64) will actually *decrease* by around 4.1% (around 2,650 fewer people), which represents a decline from 58% of the total population in 2011 to less than half the population (49%) in 2031;
 - The number of people aged 65 and over will grow by 65.6% (14,400 people) – rising from 19% of the population in 2011 to 29% in 2031.

Table 3: Stroud District population projections and projected demographic change

Stroud District population projections (2012 ONS Sub-regional projections)										
Age Group	2011 census		2015 projection		2020 projection		2025 projection		2031 projection	
0 – 19	25,955	23%	25,700	22%	26,200	22%	27,300	22%	27,600	22%
	% change on 2011 census figure:		- 1.0%		+ 0.9%		+ 5.2%		+ 6.3%	
20 - 64	64,847	58%	63,900	56%	64,100	54%	63,400	52%	62,200	49%
	% change on 2011 census figure:		- 1.5%		- 1.2%		- 2.2%		- 4.1%	
65 +	21,977	19%	25,400	22%	28,500	24%	31,800	26%	36,400	29%
	% change on 2011 census figure:		+ 15.6%		+ 29.7%		+ 44.7%		+ 65.6%	
Total pop.	112,779		115,000		118,800		122,500		126,200	
	% change on 2011 census figure:		+ 2%		+ 5%		+ 9%		+ 12%	



2.2.6 **Table 3** (above) shows how the population and demographic composition of Stroud District is projected to change by 2031. If the predicted District-wide trends were to occur on a consistent basis in each settlement, the following effects might be observed (**Table 4**):

Table 4: Fastest growing settlements and their changing demography (projected)

Settlements in the Hierarchy (CP3)	% increase on 2011 population by 2031	Projected population increase ⁶ 2011-2031 (rounded to 10)	2011 census			2031 projection		
			% of pop. aged 0-19	% of pop. aged 20-64	% of pop. aged 65 +	% of pop. aged 0-19 ⁷	% of pop. aged 20-64 ⁸	% of pop. aged 65 + ⁹
Stroud District Totals / Average :	12%	13,421	23%	58%	19%	22%	49%	29%
Painswick	20%	490	19%	49%	30%	16%	39%	45%
Minchinhampton	18%	630	20%	51%	29%	18%	41%	41%
Bisley	17%	130	19%	54%	27%	17%	45%	38%
Oakridge Lynch	17%	90	19%	54%	27%	17%	45%	38%
North Woodchester	16%	100	21%	53%	26%	19%	44%	37%
Amberley	16%	90	21%	53%	26%	19%	44%	37%
Leonard Stanley	15%	210	21%	55%	24%	20%	46%	34%
North Nibley	15%	90	23%	53%	24%	21%	44%	35%
Coaley	14%	90	21%	56%	23%	20%	47%	33%
Uley	14%	160	21%	56%	23%	20%	47%	33%
Cam	14%	1,110	22%	56%	22%	20%	48%	32%
Kings Stanley	14%	210	21%	57%	22%	19%	48%	33%
Slimbridge	13%	100	21%	57%	22%	20%	48%	32%
Berkeley	12%	250	20%	60%	20%	19%	51%	30%
Wotton Under Edge	12%	600	23%	57%	20%	22%	48%	30%
Upton St Leonards	12%	100	23%	57%	20%	21%	49%	30%
Whiteshill & Ruscombe	12%	140	24%	56%	20%	23%	48%	29%
Eastington	12%	190	22%	58%	20%	21%	50%	29%
Brimcombe	12%	280	23%	58%	19%	22%	49%	29%
Chalford	12%	340	27%	55%	19%	25%	47%	28%
Nailsworth	11%	660	23%	58%	19%	22%	50%	28%
Frampton on Severn	11%	150	24%	58%	18%	23%	50%	27%
Horsley	11%	50	24%	57%	18%	23%	49%	28%
Newtown & Sharpness	11%	150	22%	60%	18%	21%	52%	27%
Whitminster	11%	100	22%	59%	19%	21%	51%	28%
Stroud	10%	2,520	24%	59%	17%	23%	52%	25%
Stonehouse	10%	790	26%	57%	17%	25%	50%	25%
Dursley	10%	700	24%	59%	17%	23%	51%	26%
Kingswood	10%	140	28%	56%	16%	26%	49%	25%
Manor Village	9%	250	25%	60%	15%	25%	53%	22%
Hardwicke	7%	290	23%	65%	12%	23%	58%	19%

⁶ These figures have been calculated by applying [ONS 2012 population projections](#) to [2011 census data](#) about population and demographic make-up in each of the District's Lower Super Output Areas (LSOAs). Totals for each settlement have been estimated by aggregating the figures for census LSOAs. They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

⁷ Based on a predicted 6.3% increase in the number of people aged 0-19, between 2011 and 2031

⁸ Based on a predicted 4.1% decrease in the number of people aged 20-64, between 2011 and 2031

⁹ Based on a predicted 65.6% increase in the number of people aged 65 or over, between 2011 and 2031

- 2.2.7 **Table 4** highlights how the fastest (proportional) pressure for population growth seems to go hand-in-hand with an 'ageing' population. So, if recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as **Painswick, Minchinhampton, Amberley, Bisley, North Woodchester** and **Oakridge Lynch** (which already have a higher proportion of older people than elsewhere in the District) could see a significant increase their retirement-aged population during the Plan period, matched by an equally significant reduction in their working-age population.
- 2.2.8 Conversely, those settlements where there is currently a more balanced demographic make-up, or where there is a particularly high proportion of working-age adults (such as **Hardwicke** and **Manor Village**) might see slower 'natural' population growth. Based on current trends, the major towns of **Stroud, Stonehouse** and **Dursley**, which each have a significant proportion of working-age adults and a greater-than-average proportion of children and young people, are projected to see slower-than-average population growth.
- 2.2.9 In reality of course population growth will always be limited by housing supply: no population can grow significantly unless there are homes for people to live in.
- 2.2.10 But this theoretical exercise is still illuminating. Especially in respect of demographic change and how the choices that different age groups and types of people make (e.g. families, working-age adults, older people) about where they live can significantly alter (or entrench) a place's demographic composition over time. This in turn may affect its sustainability, economic vitality and the way it functions.
- 2.2.11 In section 3 of this study, we will see how the demographic make-up of a settlement can be closely related to its employment role and levels of economic activity.

2.3 Settlement size: number of dwellings

- 2.3.1 It is interesting to look at which settlements have grown most (or least) over past decades and consider whether this accords in any way with the levels of natural 'demand' that each place may experience (in terms of pressure for population growth).
- 2.3.2 **Table 5** sets out a 'hierarchy' of settlements, ranked from largest to smallest by number of dwellings. By and large, this ranking matches that of **Table 1**, which is based on population size. This table also shows the increase in the number of dwellings in each settlement between 2001 and 2014. District-wide, there has been an increase of 11% in the number of dwellings since 2001 (an increase of 7% during the Local Plan period so far, i.e. 2006-2014). But this growth rate is far from consistent across all settlements:

Key to Table 5

Largest	Number of dwellings 10,000+		+ 4% or more above the District Average
V. Large	Number of dwellings 3,000 – 4,000		+ 1% - 3% above the District average
Large	Number of dwellings 2,000 – 2,999		= the Stroud District average
Large	Number of dwellings 1,000 – 1,999		- 1% - 2% below the District average
Medium	Number of dwellings 600 – 999		- 3% or more below the District average
Medium	Number of dwellings 400 – 599		
Small	Number of dwellings 200 – 399		
Smallest	Number of dwellings less than 200		

Table 5: Number of dwellings in each settlement (2001 – 2014)

Settlements in the Hierarchy (CP3)	Number of dwellings			Historic increase in the number of dwellings #		Projected population increase 2011-2031
	2001* (census)	2011* (census)	2014 ¹⁰	Overall 2001-2014	During the Plan period so far (2006-2014)	
Stroud District Totals / Average :	45,957	49,935	51,222	11%	7%	12%
Stroud	10,197	11,345	11,615	14%	8%	10%
Cam	3,585	3,656	3,751	5%	5%	14%
Stonehouse	3,037	3,275	3,390	12%	5%	10%
Dursley	2,579	3,030	3,063	19%	13%	10%
Nailsworth	2,286	2,632	2,674	17%	9%	11%
Wotton Under Edge	2,097	2,192	2,216	6%	2%	12%
Hardwicke	1,604	1,728	1,769	10%	3%	7%

* Census 2001 and 2011. Totals for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

¹⁰ This total has been calculated using data from the annual Stroud District Housing Land Availability Study (HLA) 2012, 2013 and 2014, added to 2011 Census figures. Housing completion numbers are recorded by parish, not by settlement. So, annual completion figures between 1st April 2011 and 31st March 2014 have been apportioned between the settlements as realistically as possible. This column should therefore be viewed as indicative, rather than factually exact.

As above, these percentages are calculated using a combination of Census and Stroud District HLA data. These columns should therefore be viewed as indicative rather than exact.

Settlements in the Hierarchy (CP3)	Number of dwellings			Historic increase in the number of dwellings #		Projected population increase 2011-2031
	2001* (census)	2011* (census)	2014 ¹⁰	Overall 2001-2014	During the Plan period so far (2006-2014)	
Stroud District Totals / Average :	45,957	49,935	51,222	11%	7%	12%
Minchinhampton	1,336	1,370	1,345	1%	3%	18%
Manor Village	1,218	1,254	1,256	3%	0%	9%
Painswick	1,185	1,248	1,252	6%	5%	20%
Chalford	1,123	1,198	1,204	7%	1%	12%
Brimcombe	958	1,035	1,046	9%	3%	12%
Berkeley	884	928	933	6%	3%	12%
Kings Stanley	683	691	724	6%	5%	14%
Eastington	619	671	685	11%	8%	12%
Leonard Stanley	630	640	647	3%	1%	15%
Newtown & Sharpness	605	627	699	16%	14%	11%
Frampton on Severn	526	575	582	11%	2%	11%
Kingswood	509	542	571	12%	15%	10%
Whiteshill & Ruscombe	495	496	498	1%	2%	12%
Uley	469	482	489	4%	3%	14%
Upton St Leonards	471	478	482	1%	1%	12%
Whitminster	325	367	386	19%	5%	11%
Bisley	333	361	370	11%	4%	17%
Slimbridge	310	324	332	7%	5%	13%
North Woodchester	269	286	292	9%	3%	17%
Oakridge Lynch	238	258	259	9%	1%	17%
Coaley	255	257	259	1%	6%	14%
Amberley	224	238	240	7%	4%	17%
North Nibley	214	234	236	10%	3%	15%
Horsley	170	177	178	4%	3%	11%
Hunts Grove	2	4	280*	7,000%	14,000%	X

2.3.3 Many settlements have grown at a much slower rate than the District average. This is because a significant proportion of the development that occurred between 2001-2014 (and 2006-14) was actually located on sites outside of settlements, including large allocations (such as Brockworth) and some big 'windfall' developments.

2.3.4 A couple of significant anomalies need to be explained: the 2014 Housing Land Availability Study (HLA) recorded annual house-building completions at 1st April 2014. For **Minchinhampton** and **Leonard Stanley**, this 'snap shot' is a distorted picture, as it records significant demolitions (-37 and -23 respectively), connected to the Council's housing re-build programme in these two villages. At this time, there were no re-built homes completed, so the figures appear as a net loss in the HLA. This translates as falsely low growth rates for both places during the period 2006-2014.

2.3.5 Settlements with the highest (above average) rate of housing growth between 2001 and 2014 are:

- Dursley
- Whitminster
- Nailsworth
- Newtown & Sharpness
- Stroud
- Stonehouse
- Kingswood

2.3.6 Some of these are relatively small settlements. Housing growth during this period has certainly not been focused entirely at the District's main settlements. And while **Stroud** and **Stonehouse** both had above-average rates of growth between 2001-2014, their rates have been considerably slower during the more recent period 2006-2014 (i.e. since the start of the current Local Plan period). Indeed, **Stonehouse** has only seen a 5% increase in the number of dwellings since 2006 – well below the District average. **Cam**, meanwhile (the District's second largest settlement), has only seen a 5% increase in the number of dwellings since 2001 – amongst the lowest proportional growth rates in the District. **Wotton Under Edge** and **Berkeley** (both sizeable market towns) also appear to have had very low growth since 2001 and during the current Plan period.

2.3.7 Some of the slowest growth rates (particularly during the period since 2006) have occurred in settlements which are *theoretically* projected to see some of the most extreme pressure to grow:

- Painswick
- Minchinhampton (even allowing for the anomaly noted at 2.3.5 above)
- Bisley
- North Woodchester
- Oakridge Lynch
- Amberley

2.3.8 These are places with much higher than average proportions of over 65s, high levels of retirees and low levels of economic activity: characteristics that would be likely to become more extreme if their populations were to grow as projected.

2.3.9 These polarities and variations between settlements highlight the importance of taking policy decisions about where to direct future growth.

Settlement size, population and demographic mix: conclusions and sensitivity to future change

2.3.10 The distribution of population does have a bearing on the function and role of a settlement. Broadly, the largest settlements tend to have the more complex functions and most diverse roles. But certain population levels do not guarantee a relative degree of functionality. The way that a particular settlement functions can be affected by spatial issues, such as the proximity to neighbouring settlements or access to transport. Settlements do not exist in isolation.

2.3.11 Over time, changes in the economy, population and level of service provision could potentially alter the function of an individual settlement and how it relates to others. Settlements can be classified based on existing data and this will provide a robust snapshot in time. However, settlement function (and therefore classification) could change over time.

2.3.12 The effect of population change (growth, decline or a shift in demographic make-up) is a particularly complex factor, which could potentially have profound implications for some of our settlements.

2.3.13 Whilst it is easy to comprehend that population growth cannot happen without housing growth, there is another, less tangible, force at work: the trend for reducing household sizes is a national one and Stroud District is certainly not immune. Unless new homes are built, the population of all

settlements will actually *decrease* (smaller households mean that fewer people are accommodated within the same number of units).

3.1.12 Why is this significant?

- A shrinking population: might a reduction in the population of a settlement affect the viability of services and facilities?
- Dramatic demographic change in certain settlements: an ageing population, and a corresponding reduction in the economic activity rates of the population. Might this place the viability of services and facilities at risk?

3.1.13 If the population of Stroud District is ageing and household size is reducing, then in the future the level of economically active population will reduce. This in turn will affect the ratio of jobs to workers (“employment density” – see Part 3 of this study), resulting in potentially fewer workers to fill local jobs.

3.1.14 In reality, other factors will come into play, including migration and new development. Migration will result in natural exchange of population within and between settlements, which will influence demographic structure. However, declining household size and an ageing population are national trends and if anything Stroud District’s migration trends (i.e. unusually high levels of over 65s and retirees moving into the District) may exacerbate the situation and lead to ever greater ‘polarisation’ between those settlements with large working-age populations and high levels of economic activity, and those with fast ageing populations, low levels of economic activity and a high proportion of retirees.

3.1.15 The key message for settlement function, therefore, is the importance of future development allocations when it comes to supporting existing settlement role and function. Dependent on the level of future development, it is clear that a reduction of economically active population is likely to occur in some settlements. A decision needs to be taken on which settlements should have their employment role supported by additional accommodation for new economically active people.

3. Employment role and economic activity

The District's settlements display great diversity in terms of their employment roles and the particular characteristics of their working populations. Not all settlements have a significant role to play in terms of providing jobs. Some settlements function principally as 'dormitories' for workers; some have a particularly high proportion of retired residents and/or very low levels of economic activity amongst residents. Only a few settlements draw large numbers of workers into them. So which are the District's major employment providers? Which settlements are net importers of workers and which are net exporters?

- 3.0.1 As we have seen in Part 2 (settlement size), the distribution of population does have a bearing on the function and role of a settlement. Broadly, the largest settlements tend to have the more complex functions and most diverse roles.
- 3.0.2 But a certain population level does not necessarily guarantee a relative degree of functionality. The way that a particular settlement functions can be affected by spatial issues, such as the proximity to neighbouring settlements or access to transport. And, as we have seen, the demographic make-up of particular settlements can vary enormously, which itself is partly a cause and partly an effect of the way that each settlement functions.
- 3.0.3 Examining the population's economic characteristics can give us further insight into how a settlement functions. How many people are working? What kinds of jobs are they doing? Are they travelling far, or able to work very locally? The number of economically active people in a settlement, compared against the number of jobs based there, is a good indicator of a settlement's sustainability: a good ratio of jobs to homes increases the *potential* for residents to live and work within the settlement.

3.1 Economic activity rates

- 3.1.1 The 'economic activity rate' is the percentage of a population, both employed and unemployed, which is normally available to work – i.e. the total potential workforce. This usually involves counting only people aged between 16 and 74, i.e. those conventionally considered to be 'working age adults'. The 'economic activity rate' of a population is therefore different from the 'employment rate', because it counts the potential supply of workers, rather than the number of people in current employment.
- 3.1.2 **Table 6** takes a look at the resident working-age population of each settlement, to get an idea of the relative levels of economic activity (according to the 2011 Census).

Key to Table 6

Largest	13,000+ economically active residents
V. Large	3,000 – 5,000 economically active residents
Large	2,000 – 2,999 economically active residents
Large	1,000 – 1,999 economically active residents
Medium	800 – 999 economically active residents
Medium	500 – 799 economically active residents
Small	300 – 499 economically active residents
Smallest	Fewer than 300 economically active residents

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

Table 6 : Settlements with the biggest economically active populations (Census 2011)

Settlements in the Hierarchy (CP3)	Population count * (2011): all residents aged 16-74	* Economically active population: (As a % of pop. aged 16-74)		% of Economically active population:					* Economically inactive population: (As a % of pop. aged 16-74)		% of Economically inactive pop.:				
				Employed part-time	Employed full-time	Self-employed	Unemployed	Full-time student			Retired	Student	Looking after home or family	Long term sick or disabled	Other
Stroud District average / totals:	81,955	59,980	73%	16%	39%	13%	3%	2%	21,975	27%	16%	4%	3%	3%	1%
Stroud	18,490	13,900	75%	17%	40%	12%	4%	3%	4,590	25%	13%	4%	3%	4%	1%
Cam	5,920	4,180	71%	16%	41%	8%	3%	3%	1,740	29%	18%	3%	4%	3%	1%
Stonehouse	5,600	4,150	74%	16%	44%	8%	3%	3%	1,450	26%	13%	4%	4%	3%	1%
Dursley	4,830	3,510	73%	16%	41%	9%	4%	2%	1,320	27%	14%	3%	5%	4%	1%
Nailsworth	4,230	3,060	72%	15%	38%	14%	3%	2%	1,170	37%	20%	6%	6%	4%	2%
Wotton Under Edge	3,510	2,590	74%	17%	41%	11%	3%	2%	920	26%	16%	3%	3%	2%	1%
Hardwicke	2,960	2,400	81%	17%	48%	11%	3%	3%	560	19%	10%	3%	3%	2%	1%
Manor Village	2,030	1,590	78%	17%	43%	13%	2%	2%	450	22%	12%	4%	3%	2%	1%
Minchinhampton	2,360	1,530	65%	13%	31%	16%	2%	2%	830	35%	21%	4%	4%	4%	2%
Chalford	2,040	1,500	73%	17%	34%	18%	2%	2%	550	27%	17%	4%	4%	1%	1%
Brimscombe	1,740	1,270	73%	15%	37%	17%	3%	2%	470	27%	16%	4%	3%	3%	1%
Berkeley	1,490	1,120	75%	15%	45%	10%	2%	2%	380	25%	16%	2%	3%	2%	1%
Painswick	1,660	1,040	63%	13%	29%	18%	2%	2%	620	37%	27%	3%	4%	2%	1%
Eastington	1,150	860	74%	15%	39%	16%	1%	3%	300	26%	16%	3%	2%	3%	1%
Kings Stanley	1,140	810	71%	16%	39%	12%	2%	3%	330	29%	19%	3%	3%	3%	1%
Frampton on Severn	1,030	800	78%	16%	40%	16%	3%	2%	240	23%	14%	3%	3%	2%	1%
Newtown & Sharpness	1,060	780	74%	16%	41%	12%	2%	3%	280	26%	14%	3%	4%	4%	1%
Leonard Stanley	1,060	750	70%	17%	37%	12%	2%	2%	310	30%	19%	3%	3%	4%	1%
Kingswood	980	730	74%	17%	39%	14%	2%	3%	250	26%	14%	5%	4%	1%	1%

Settlements in the Hierarchy (CP3)	Population count * (2011): all residents aged 16-74	* Economically active population: (As a % of pop. aged 16-74)		% of Economically active population:					* Economically inactive population: (As a % of pop. aged 16-74)		% of Economically inactive pop.:				
				Employed part-time	Employed full-time	Self-employed	Unemployed	Full-time student			Retired	Student	Looking after home or family	Long term sick or disabled	Other
Stroud District average / totals:	81,955	59,980	73%	16%	39%	13%	3%	2%	21,975	27%	16%	4%	3%	3%	1%
Whiteshill & Ruscombe	850	630	74%	16%	33%	20%	2%	3%	220	26%	17%	5%	2%	1%	1%
Upton St Leonards	830	610	73%	14%	41%	13%	2%	3%	220	27%	17%	4%	3%	2%	1%
Uley	830	590	71%	15%	34%	18%	2%	3%	240	29%	18%	4%	3%	2%	1%
Whitminster	650	490	76%	16%	41%	15%	2%	2%	160	24%	15%	3%	3%	2%	1%
Slimbridge	590	410	68%	13%	37%	15%	2%	2%	190	32%	20%	3%	4%	3%	2%
Bisley	550	380	69%	13%	30%	22%	2%	2%	170	31%	22%	3%	3%	1%	1%
Coaley	470	330	70%	14%	33%	17%	2%	3%	140	30%	20%	5%	3%	2%	1%
North Woodchester	450	310	68%	14%	32%	18%	2%	2%	150	32%	22%	3%	4%	2%	1%
North Nibley	400	280	71%	16%	33%	17%	2%	3%	120	29%	20%	3%	2%	1%	2%
Oakridge Lynch	390	270	69%	13%	30%	22%	2%	2%	120	31%	22%	3%	3%	1%	1%
Amberley	380	260	68%	14%	32%	18%	2%	2%	120	32%	22%	3%	4%	2%	1%
Horsley	300	210	70%	15%	31%	19%	2%	2%	90	29%	17%	5%	4%	2%	2%

* Figures rounded to nearest 10 (May not add, due to rounding). Percentages calculated using un-rounded figures.

Census 2001 and 2011. Totals and percentages for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

3.1.3 **Table 6** shows that **Stroud** has by far the largest economically active population – unsurprising, given that it has the largest total population as well. In fact, the sequence of settlements in this table (ranked from biggest economically active population to smallest economically active population) corresponds pretty closely with the sequence of settlements in **Table 1** (page 7), which shows the total population of each settlement (ranked biggest-smallest).

3.1.4 There is a very broad trend that the *lowest* rates of economic activity tend to be seen within the smallest settlements:

- | | | | |
|---------------------|-------|------------------|-------|
| • Slimbridge | (68%) | • North Nibley | (71%) |
| • Bisley | (69%) | • Oakridge Lynch | (69%) |
| • Coaley | (70%) | • Amberley | (68%) |
| • North Woodchester | (68%) | • Horsley | (70%) |

These eight settlements all have low economic activity rates, well below the District average of 74%. Of course, they each have a correspondingly high rate of economic *inactivity*, but it is interesting that this appears to be a result of the exceptionally high proportion of retirees amongst their economically inactive populations. Apart from Horsley, these small communities have relatively elderly populations with a relatively small proportion of working-age adults (when compared to the District average) (see **Table 1** on page 7 and **Table 4** on page 11). It is also interesting that, amongst the economically active, these communities show very high levels of self-employment and very low levels of full-time employment.

3.1.5 **Whitminster** is an exception. Despite its relatively small population, it has an above-average rate of economic activity (76%), above-average rates of employment, and a below-average proportion of retired people amongst its economically inactive population.

3.1.6 The settlements with the *highest* rates of economic activity are:

- Hardwicke (81%)
- Manor Village (78%)
- Frampton on Severn (78%)

3.1.7 The correlation between settlement (population) size and economic activity is much less clear-cut at this end of the scale. A big settlement does not necessarily guarantee a high rate of economic activity amongst its residents, although very low rates are less common than in the smaller settlements. Of the ten largest settlements, only half have above-average levels of economic activity:

- Stroud (75%)
- Stonehouse (74%)
- Wotton Under Edge (74%)
- Hardwicke (81%)
- Manor Village (78%)

Stroud:

Although Stroud has by far the largest economically active population, it has only slightly above-average levels of economic activity. It has a below-average proportion of self-employed people and a slightly above-average unemployment rate (only Stroud and Dursley had more than 3% unemployment in 2011). The proportion of retired people in Stroud is amongst the lowest in the District.

Stonehouse:

Stonehouse is only slightly above average in terms of its economic activity rate. The number of economically active people living in Stonehouse is very similar to that of Cam, but the activity rate is

higher. Like Stroud, the proportion of retired people is well below average. The proportion of self-employed people is very low; but the proportion of people in full time employment is well above average.

Dursley:

The economic activity rate in Dursley matches the District average (73%). Dursley has the fourth largest economically active population in the District. Dursley has low levels of self-employment. Amongst the economically inactive, there is a below-average proportion of retirees; but a relatively large proportion of economic inactivity is due to looking after home or family (second only to Nailsworth).

Cam:

Of the District's four main settlements, Cam is the only one with below-average levels of economic activity. Yet this is still the second largest economically active population in the District (similar in size to Stonehouse). This low rate seems to be due to Cam's relatively high proportion of retirees. Like the other main settlements, Cam has a very low proportion of self-employed residents.

- 3.1.8 Amongst the District's largest settlements, **Minchinhampton** and **Painswick** stand out from the prevailing trends. Like the smallest settlements, these two towns have low economic activity rates (65% and 63% respectively), below-average rates of both part-time and full-time employment, above-average levels of self-employment and a very high proportion of retirees. These two settlements have the lowest proportion of working-age adults of all the settlements in this study; combined with the highest proportion of people aged 65+ (see **Table 1** on page 7 and **Table 4** on page 11).

Economic activity: conclusions and sensitivity to future change

- 3.1.9 A key issue for the District is the predicted reduction in our working-age population throughout the course of the Plan period. ONS 2012 sub-national population projections suggest that the number of working-age adults (aged 20-64) will actually *decrease* by around 4.1% (around 2,650 fewer people), which represents a decline from 58% of the total population in 2011 to less than half the population (49%) in 2031 (see **Table 3** on page 10).
- 3.1.10 Predicting the knock-on effects in terms economic activity is not straight forward. Of course it is likely that we will see some degree of decline in overall levels of economic activity (inevitable where there is a reduction in the total working-age population, combined with a boom in the over-65 population). But we should not assume that the proportion of over-65s who 'retire' (i.e. become economically inactive) will remain consistent. So it is unlikely that there will be an exact correlation.
- 3.1.11 Broadly, it appears that those settlements with the lowest rates of economic activity tend to be those with the greatest proportion of over-65s amongst their population (compare **Table 6** above with **Table 1** on page 7 and **Table 4** on page 11). The ONS 2012 projections suggest that these are also the sorts of settlements that are likely to experience the most pressure to grow, as already discussed in Part 2 of this study (para. 2.2.7 onwards), and are likely to have the fastest ageing populations. Left to their own devices, these settlements would be likely to grow towards having an even greater proportion of over-65s and even more retirees, combined with a decreasing working-age population. So the economically inactive population is projected to grow fastest within these settlements, and looks set to outstrip any growth in the economically active population.
- Painswick
 - Minchinhampton
 - Bisley
 - Oakridge Lynch
 - North Woodchester
 - Amberley

- 3.1.10 Meanwhile, many of the settlements with large economically active populations and/or high rates of economic activity are projected to see much slower 'natural' pressure to grow, including:
- Stroud
 - Stonehouse
 - Dursley
 - Manor Village
 - Hardwicke

These settlements tend to have a much higher proportion of working-age adults amongst their populations, and this sector of the District's population is forecast to shrink over the next 15 years (see **Table 3** on page 10 and **Table 4** on page 11). Additionally, these places tend to be less attractive to retirees and migrating over-65s.

- 3.1.11 Whilst trends of in-migration and out-migration might continue to influence the demographic make-up of each settlement, in reality future population *growth* will only ever be facilitated by new housing development. In a void without policy intervention to direct the distribution of housing growth, it would seem that the greatest pressure for growth might occur in the least appropriate and least sustainable places; meanwhile, there may be increasing polarisation of 'economically inactive settlements'.

3.2 Settlements with a strong employment role

- 3.2.1 Are particular settlements net importers or exporters of workers? Which settlements have the strongest roles as employment bases (i.e. which settlements provide the greatest number of jobs)? What types of jobs are available in each settlement?
- 3.2.2 As well as collecting information about residents, the 2011 Census counted the number of people whose workplace is based within the District – i.e. people who work here, but don't necessarily live here. When compared to the resident working population, this gives a good indication of how 'sustainable' a particular settlement is in terms of net import/export of workers. This data highlights those settlements that have a strong role in providing jobs.
- 3.2.3 **Table 7** looks at the ratio of jobs to workers in each settlement. "Employment density" judges the *opportunity* to live and work in close proximity. Obviously, the picture is more complex than a simple mathematical surplus/deficit: in all cases, there will be a considerable in-flow and out-flow of workers, as people travel to jobs that match their skills and professional capabilities, wherever they may be available. (Travel to work patterns are looked at in more detail in **section 3.4** of this study).
- 3.2.4 Not everyone would choose to live and work within a very local area. But settlements with an "employment density" score over 1.0 (i.e. where there is at least 1 job for every 1 economically active resident) will offer the best opportunity to be able to do so; the lower the score, the less opportunity there will be for the resident population to find work on their doorstep. This means that low-scoring settlements are inevitably going to limit residents' options and reduce their choice about commuting to work.
- 3.2.5 In this sense, the settlements with the highest "employment density" are more balanced and more sustainable.

Key to Table 7

Largest	More than 7,000 locally based jobs
V. Large	More than 2,000 locally based jobs
Large	1,000 – 1,999 locally based jobs
Large	800 – 999 locally based jobs
Medium	600 – 799 locally based jobs
Medium	400 – 599 locally based jobs
Small	300 – 399 locally based jobs
Smallest	Fewer than 300 locally based jobs

Importer	Net importer of more than 3,000 workers
Importer	Net importer of more than 400 workers
Importer	Net importer of between 100 – 200 workers
Balanced	Net importer of between 0 – 99 workers
Balanced	Net exporter of between 1 – 99 workers
Exporter	Net exporter of between 100 – 399 workers
Exporter	Net exporter of between 400 – 699 workers
Exporter	Net exporter of more than 1,000 workers

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

NOTE:

The total figures for census LSOA 'STROUD 010A' have been apportioned between Amberley, North Woodchester and the surrounding rural area, according to a formula (see APPENDIX 2). In reality, though, the majority of jobs based in this geographic LSOA are likely to sit closer to Woodchester and the industrial valley bottom, rather than the settlement of Amberley. So the true employment figures and "employment density" for North Woodchester is probably higher, whilst the figures for Amberley are lower.

Table 7: Settlements with a strong employment role (Census 2011)

Settlements in the Hierarchy (CP3)	Local workers: Resident population (aged 16-74): Number of economically active residents (March 2011) *	Local jobs: Workplace population (aged 16-74): Number of people at work in each settlement (March 2011) *	Settlements in the Hierarchy (CP3)	Is the settlement a net importer or exporter of workers? *	"Employment density" (available local jobs/available resident workers)
Stroud District Totals / Average :	59,980	50,092	Stroud District Totals / Average :	-9,888	0.84
Stroud	13,900	11,720	Stonehouse	+ 3,130	1.75
Stonehouse	4,150	7,280	Kingswood	+ 460	1.63
Dursley	3,510	2,420	Whitminster	+ 200	1.41
Nailsworth	3,060	2,380	North Woodchester	+ 120	1.39
Cam	4,180	1,980	Amberley	+ 100	1.38
Wotton Under Edge	2,590	1,370	Eastington	+ 50	1.06
Minchinhampton	1,530	1,350	Brimscombe	+ 70	1.06
Brimscombe	1,270	1,340	Frampton on Severn	+ 30	1.04
Hardwicke	2,400	1,230	Slimbridge	0	1.00
Kingswood	730	1,190	Upton St Leonards	- 10	0.98
Eastington	860	910	Minchinhampton	-180	0.88
Painswick	1,040	850	Stroud	-2,180	0.84
Chalford	1,500	840	Painswick	-190	0.82
Frampton on Severn	800	830	Oakridge Lynch	-70	0.82
Berkeley	1,120	810	Bisley	-50	0.81
Whitminster	490	690	Nailsworth	-680	0.78
Upton St Leonards	610	600	North Nibley	-70	0.75
Manor Village	1,590	580	Berkeley	-310	0.72
Newtown & Sharpness	780	510	Dursley	-1,090	0.69
North Woodchester	310	430	Newtown & Sharpness	-270	0.65
Slimbridge	410	410	Horsley	-80	0.62
Amberley	260	360	Chalford	-660	0.56
Kings Stanley	810	340	Uley	-260	0.56
Uley	590	330	Wotton Under Edge	-1,220	0.53
Bisley	380	310	Hardwicke	-1,170	0.51
Leonard Stanley	750	310	Coaley	-170	0.48
Whiteshill & Ruscombe	630	240	Cam	-2,200	0.47
Oakridge Lynch	270	220	Leonard Stanley	-470	0.42
North Nibley	280	210	Kings Stanley	-440	0.41
Coaley	330	160	Whiteshill & Ruscombe	-390	0.38
Horsley	210	130	Manor Village	-1,010	0.36

* figures rounded to nearest 10. May not add, due to rounding. Jobs:workers ratio has been calculated using un-rounded figures.

Census 2011. Totals and percentages for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used

3.2.6 The District's biggest employment 'hubs' are at:

- Stroud
- Stonehouse
- Dursley
- Nailsworth
- Cam*

These settlements are all home to 2,000+ jobs (*except Cam, which is *just* short of 2,000, according to these figures. However, it is still a major provider.)

3.2.7 The following settlements each provides between 1,000 and 2,000 jobs:

- Wotton Under Edge
- Minchinhampton
- Brimscombe
- Hardwicke
- Kingswood

3.2.8 **Table 7** shows **Stroud** and **Stonehouse** to have the greatest concentration of jobs in the District – but they function very differently from each other:

Stroud:

Whilst Stroud provides thousands more jobs than any other settlement in the District, it does actually 'export' workers: there are slightly more economically active, working people living in Stroud than there are jobs.

Stonehouse:

By contrast, Stonehouse draws thousands of workers in from elsewhere: there are over 3,000 more jobs in the settlement than there are working residents. Of the District's larger settlements, Stonehouse is in a league of its own, with a score of 1.75 jobs available for every 1 economically active resident.

Cam:

At the other end of the scale, Cam has less than half a job available for every economically active resident. Despite the fact that there are nearly 2,000 jobs available within the settlement, it also acts as a major 'dormitory' town for the District's working population (more than 4,000 people).

Dursley:

Dursley is another significant provider of jobs for the District. Yet here, too, there is a significant mismatch between the number of jobs available and the number of residents available to work. With an "employment density" score of 0.69, there is less than ¾ of a job per 1 economically active resident. So, like Cam, Dursley acts as a major 'dormitory', as well as being a big provider.

3.2.9 The following settlements have around twice as many residents available to work than jobs available. Hence their principal role is as a 'dormitory', where *most* people have no choice but to commute to work elsewhere:

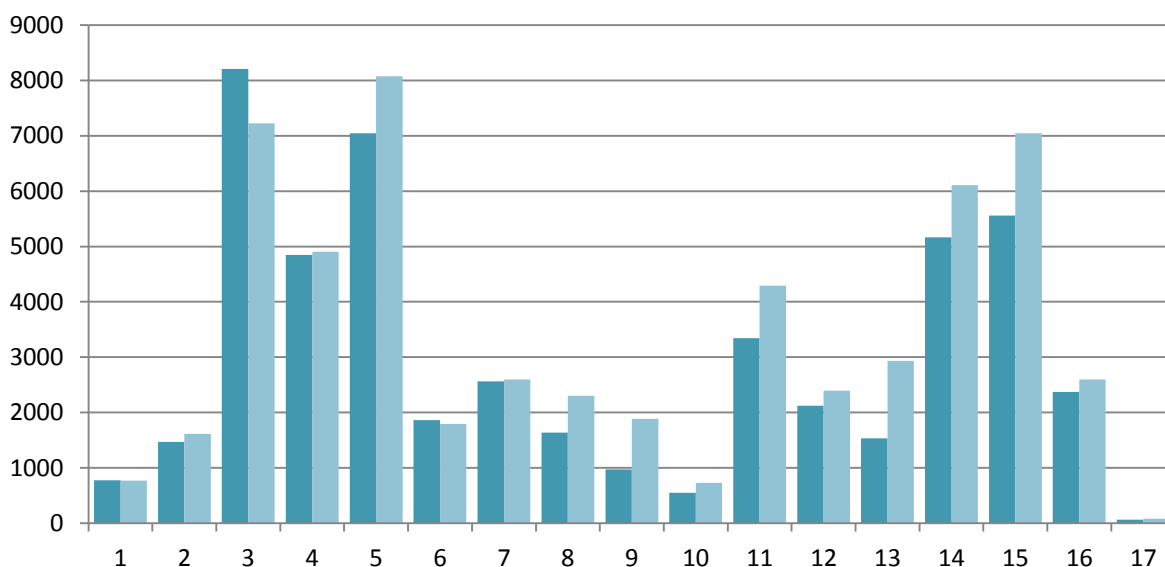
- | | |
|-------------------------|---------------------|
| • Manor Village | • Coaley |
| • Whiteshill & Ruscombe | • Hardwicke |
| • Kings Stanley | • Wotton Under Edge |
| • Leonard Stanley | • Uley |
| • Cam | • Chalford |

3.2.10 Whereas this sort of pattern is unsurprising in smaller settlements (where one might naturally expect to travel out for work and to access many services and facilities), it is notable that this list includes some of the District's largest settlements (in terms of population size).

3.3 Occupations and employment sectors

- 3.3.1 It is useful to look at the resource we have, in terms of our resident workforce, and compare this to the types of jobs that are on offer locally. There is data available that shows the range of industries that residents were employed in at the time of the census (2011), and also the types of occupations. It is also possible to correlate the types of industry/occupations with travel-to-work data (see part 3.4 of this study) – so it is possible to see which types of jobs require people to travel furthest or out of the District to work, and which provide the opportunity for people to live and work very locally.
- 3.3.2 Overall in Stroud District, there are 57,342 residents (aged 16-74) in some form of employment. This compares to a total of 50,092 people whose workplace is based within the District. So, broadly, there is a *net* out-flow of 7,250 people (Census 2011).
- 3.3.3 The graph below shows data for a range of employment sectors: it compares the number of people *living* in the District who worked in each employment sector at the time of the census (“workers”, shown in light blue) with the number of people *working* in the District (“jobs”, shown in dark blue).

Graph 1: Employment sectors: a comparison of jobs and workers in Stroud District (Census 2011)



	Workplace population (jobs): the number of people whose workplace is based within the District
	Resident working population (workers): the number of Stroud District residents in employment

1: Agriculture, forestry and fishing [A]	+ 10	(net import)	<table border="1" style="margin-left: 20px;"> <tr> <td colspan="2">Total for Stroud District:</td> </tr> <tr> <td style="text-align: right;">50,092</td> <td>jobs</td> </tr> <tr> <td style="text-align: right;">57,342</td> <td>workers</td> </tr> <tr> <td style="text-align: right;">- 7,250</td> <td>net export</td> </tr> </table>	Total for Stroud District:		50,092	jobs	57,342	workers	- 7,250	net export
Total for Stroud District:											
50,092	jobs										
57,342	workers										
- 7,250	net export										
2: Energy, water and utilities [B, D, E]	-140	(net export)									
3: Manufacturing [C]	+980	(net import)									
4: Construction [F]	-50	(net export)									
5: Retail, wholesale and motor trades [G]	-1,030	(net export)									
6: Transport and storage (including postal) [H]	+70	(net import)									
7: Accommodation and food services [I]	-40	(net export)									
8: Information and communication [J]	-670	(net export)									
9: Finance and insurance [K]	-910	(net export)									
10: Property and real estate [L]	-180	(net export)									
11: Professional, scientific and technical [M]	-950	(net export)									
12: Business administration and support services [N]	-280	(net export)									
13: Public administration and defence [O]	-1,400	(net export)									
14: Education [P]	-940	(net export)									
15: Health and social work [Q]	-1,490	(net export)									
16: Arts, entertainment, recreation and other services [R, S]	-260	(net export)									
17: Other [T, U]	-20	(net export)									

(figures rounded to nearest 10)

3.3.4 The graph (above) shows that the biggest employment sectors for people living in the District are:

- retail, wholesale and motor trades [G]
- health and social work [Q]
- manufacturing [C]
- education [P]

Within the manufacturing sector, by far the biggest source of employment is high tech manufacturing. This accounts for 38% of the manufacturing jobs held by residents (and 41% of all the manufacturing jobs actually based in the District) [see note on industry sub-categories in the box below].

3.3.5 Construction and professional, scientific and technical activities also represent a significant proportion of the jobs held by the District's residents, and of the jobs on offer here.

3.3.6 Is this typical of all settlements? Are there distinct differences in the kinds of jobs done by residents of different settlements? Over the following pages, **Table 8** and **Table 9** use census data about the working population to allow us to compare and contrast residents' employment characteristics:

Note: The census collates employment data based on 20 industry sectors (referenced A – U). Manufacturing is further sub-divided into a series of industry sub-categories:

- A. Agriculture, forestry and fishing
- B. Mining and quarrying
- C. Manufacturing
 - Manufacturing: food, beverages and tobacco
 - Manufacturing: textiles, wearing apparel and leather
 - Manufacturing: wood, paper and paper products
 - Manufacturing: chemicals, chemical products, rubber and plastic
 - Manufacturing: low tech
 - Manufacturing: high tech
 - Manufacturing: other
- D. Electricity, gas, steam and air conditioning supply
- E. Water supply, sewerage, waste management and remediation
- F. Construction
- G. Wholesale and retail trade; repair of motor vehicles and motor cycles
- H. Transport and storage
- I. Accommodation and food service activities
- J. Information and communication
- K. Financial and insurance
- L. Real estate
- M. Professional, scientific and technical
- N. Administrative and support service
- O. Public administration and defence; compulsory social security
- P. Education
- Q. Human health and social work
- R, S. Arts, entertainment, recreation and other service activities
- T, U. (other)

However, the data released by the ONS does not always itemise each individual industry / sub-industry. In some data series, the figures are grouped / aggregated into broader 'sectors'. The most detailed (sub-divided) data is available at District level and at the level of Middle Super Output Area (MSOA); but at smaller geographies (Census Output Areas and Lower Super Output Areas), there tends to be more grouping. This makes direct comparison and cross-tabulation difficult. Nevertheless, it is still possible to draw out key characteristics for different settlements.

Table 8 is based on Lower Super Output Area data, where the industries have been grouped into broader sectors. The table references the industry categories (A – U) on which these groupings are based.

Table 10 is based on data from the ONS/Interdepartmental Business Register 2011. For some reason this data series does not count the number of energy, water and utilities businesses (industries B, D and E).

Key to Table 8

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

Note on **Table 8** and **Table 9**: Source Census 2011. Totals for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

Table 8: Most common employment sectors amongst residents of each settlement (Census 2011)

Settlements in the Hierarchy (CP3)	Resident population: all people (all ages) in employment (March 2011) *	Residents working in agriculture, energy and water. (Industries A, B, D, E). *	Residents working in manufacturing (Industry C) *	Residents working in construction (Industry F) *	Residents working in distribution, hotels and restaurants (Industries G, I) *	Residents working in transport and communication (Industries H, J) *	Residents working in financial, real estate, professional and administrative activities (Industries K, L, M, N) *	Residents working in public administration, education and health (Industries O, P, Q) *	Residents working in other industries (Industries R, S, T, U) *								
Stroud District average / totals:	57,745	2,421	4%	7,285	13%	4,933	9%	10,758	19%	4,122	7%	9,354	16%	16,163	28%	2,709	5%
Stroud	13,170	380	3%	1,720	13%	1,210	9%	2,580	20%	940	7%	1,860	14%	3,820	29%	680	5%
Cam	4,030	220	6%	650	16%	340	8%	730	18%	280	7%	570	14%	1,040	26%	200	5%
Stonehouse	3,950	110	3%	660	17%	340	9%	780	20%	280	7%	560	14%	1,080	27%	140	4%
Dursley	3,320	170	5%	530	16%	280	8%	630	19%	220	7%	450	13%	920	28%	120	4%
Nailsworth	2,930	80	3%	330	11%	220	7%	570	19%	210	7%	510	18%	870	30%	150	5%
Wotton Under Edge	2,480	80	3%	350	14%	200	8%	470	19%	160	6%	430	17%	710	29%	90	4%
Hardwicke	2,310	90	4%	300	13%	220	10%	520	22%	180	8%	400	17%	680	29%	100	4%
Manor Village	1,540	40	3%	190	12%	130	9%	310	20%	110	7%	270	17%	420	27%	70	4%
Minchinhampton	1,490	50	4%	160	11%	110	8%	260	17%	130	9%	280	19%	400	27%	90	6%
Chalford	1,470	30	2%	150	10%	130	9%	240	17%	110	7%	310	21%	440	30%	70	5%
Brimscombe	1,230	40	4%	140	11%	110	9%	220	18%	110	9%	210	17%	340	28%	60	5%
Berkeley	1,080	100	9%	110	10%	100	9%	210	19%	90	8%	140	13%	260	24%	70	7%

Settlements in the Hierarchy (CP3)	Resident population: all people (all ages) in employment (March 2011) *	Residents working in agriculture, energy and water. (Industries A, B, D, E). *		Residents working in manufacturing (Industry C) *		Residents working in construction (Industry F) *		Residents working in distribution, hotels and restaurants (Industries G, I) *		Residents working in transport and communication (Industries H, J) *		Residents working in financial, real estate, professional and administrative activities (Industries K, L, M, N) *		Residents working in public administration, education and health (Industries O, P, Q) *		Residents working in other industries (Industries R, S, T, U) *	
		Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Stroud District average / totals:	57,745	2,421	4%	7,285	13%	4,933	9%	10,758	19%	4,122	7%	9,354	16%	16,163	28%	2,709	5%
Painswick	1,030	30	3%	80	8%	80	8%	140	14%	90	9%	240	23%	300	29%	70	6%
Eastington	850	50	6%	110	13%	80	10%	170	20%	60	7%	120	14%	220	25%	40	5%
Kings Stanley	790	30	4%	100	12%	60	8%	140	18%	50	6%	120	16%	250	31%	30	4%
Frampton on Severn	770	50	7%	90	11%	70	10%	160	20%	50	7%	120	16%	200	26%	30	3%
Newtown & Sharpness	750	70	10%	110	14%	60	8%	140	18%	60	8%	110	14%	180	24%	40	5%
Kingswood	710	40	5%	80	11%	60	8%	110	16%	60	8%	140	19%	210	29%	20	3%
Leonard Stanley	720	30	4%	90	13%	70	9%	140	19%	40	5%	110	16%	220	30%	30	3%
Whiteshill & Ruscombe	610	20	4%	60	10%	60	9%	100	16%	40	7%	120	19%	190	31%	20	4%
Upton St Leonards	590	30	5%	50	9%	50	8%	120	20%	40	6%	110	18%	180	30%	30	5%
Uley	570	40	6%	70	11%	50	9%	90	16%	40	7%	110	18%	160	28%	30	4%
Whitminster	480	30	6%	50	11%	40	9%	100	20%	30	7%	80	17%	130	26%	20	3%
Slimbridge	400	30	9%	40	11%	30	8%	70	18%	30	6%	70	18%	100	25%	30	6%
Bisley	380	20	5%	40	11%	30	7%	70	18%	30	7%	80	21%	100	25%	20	5%
Coaley	320	20	6%	40	11%	30	9%	60	18%	20	6%	60	17%	90	28%	10	4%
North Woodchester	300	10	2%	40	12%	20	7%	50	17%	30	9%	60	21%	90	29%	10	4%
North Nibley	270	20	7%	30	10%	20	6%	50	17%	20	6%	50	18%	90	31%	10	5%
Oakridge Lynch	270	10	5%	30	11%	20	7%	50	18%	20	7%	60	21%	70	25%	10	5%
Amberley	250	10	2%	30	12%	20	7%	40	17%	20	9%	50	21%	70	29%	10	4%
Horsley	200	10	3%	20	10%	10	7%	40	18%	10	7%	40	19%	70	32%	10	6%

* Figures rounded to nearest 10 (May not add, due to rounding). Percentages calculated using un-rounded figures.

Key to Table 9

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

Note on **Table 8** and **Table 9**: Source Census 2011. Totals for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

Table 9: Most common occupations amongst residents of each settlement (Census 2011)

Settlements in the Hierarchy (CP3)	Resident population: all people (all ages) in employment (March 2011) *	1. Managers, directors and senior officials *		2. Professional Occupations *		3. Associate professional and technical *		4. Administrative and secretarial *		5. Skilled trades and occupations *		6. Caring, leisure and other services *		7. Sales and customer service *		8. Process, plant and machine operatives *		9. Elementary occupations *	
		Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Stroud District average / totals:	57,745	7,166	12%	10,984	19%	7,056	12%	6,018	10%	7,944	14%	5,412	9%	3,564	6%	4,297	7%	5,304	9%
Stroud	13,170	1,320	10%	2,180	17%	1,630	12%	1,280	10%	1,970	15%	1,460	11%	970	7%	1,060	8%	1,300	10%
Cam	4,030	450	11%	640	16%	470	12%	540	13%	490	12%	400	10%	260	6%	380	9%	390	10%
Stonehouse	3,950	350	9%	580	15%	390	10%	380	10%	560	14%	460	12%	270	7%	440	11%	510	13%
Dursley	3,320	300	9%	590	18%	360	11%	340	10%	470	14%	340	10%	230	7%	320	10%	370	11%
Nailsworth	2,930	380	13%	620	21%	370	13%	250	9%	390	13%	290	10%	200	7%	180	6%	260	9%
Wotton Under Edge	2,480	300	12%	500	20%	290	12%	250	10%	320	13%	200	8%	140	6%	200	8%	260	11%
Hardwicke	2,310	270	12%	290	13%	300	13%	320	14%	310	13%	220	10%	160	7%	220	9%	220	10%
Manor Village	1,540	180	11%	300	20%	200	13%	190	13%	210	14%	130	8%	100	7%	90	6%	140	9%
Minchinhampton	1,490	260	17%	340	23%	200	13%	150	10%	180	12%	120	8%	70	4%	80	5%	110	8%
Chalford	1,470	240	17%	390	26%	200	13%	140	10%	180	12%	90	6%	70	5%	60	4%	100	7%
Brimscombe	1,230	190	16%	270	22%	160	13%	120	10%	160	13%	100	8%	60	5%	70	6%	80	7%
Berkeley	1,080	120	11%	170	16%	130	12%	110	10%	160	15%	90	9%	60	6%	90	9%	140	13%
Painswick	1,030	200	19%	290	29%	180	17%	90	9%	110	10%	50	5%	30	3%	30	3%	50	5%

Settlements in the Hierarchy (CP3)	Resident population: all people (all ages) in employment (March 2011) *	1. Managers, directors and senior officials *		2. Professional Occupations *		3. Associate professional and technical *		4. Administrative and secretarial *		5. Skilled trades and occupations *		6. Caring, leisure and other services *		7. Sales and customer service *		8. Process, plant and machine operatives *		9. Elementary occupations *	
		Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Stroud District average / totals:	57,745	7,166	12%	10,984	19%	7,056	12%	6,018	10%	7,944	14%	5,412	9%	3,564	6%	4,297	7%	5,304	9%
Eastington	850	120	14%	150	18%	90	10%	90	11%	140	17%	80	9%	50	5%	60	7%	70	9%
Kings Stanley	790	100	13%	150	19%	90	11%	90	12%	110	14%	80	10%	50	7%	60	8%	60	7%
Frampton on Severn	770	110	15%	150	19%	80	10%	80	10%	120	15%	60	7%	50	6%	60	8%	70	9%
Newtown & Sharpness	750	70	9%	100	13%	80	10%	90	12%	110	14%	70	9%	50	6%	80	10%	120	16%
Kingswood	710	110	16%	170	24%	80	11%	80	10%	90	12%	60	8%	40	6%	30	5%	50	7%
Leonard Stanley	720	80	12%	110	15%	70	10%	80	12%	110	15%	80	11%	50	7%	60	9%	70	9%
Whiteshill & Ruscombe	610	80	13%	140	23%	100	16%	60	10%	80	12%	50	9%	30	5%	30	5%	50	7%
Upton St Leonards	590	80	13%	130	22%	80	13%	80	13%	60	11%	50	8%	40	6%	30	6%	50	8%
Uley	570	70	13%	140	25%	70	12%	60	10%	80	14%	50	9%	30	5%	30	5%	40	7%
Whitminster	480	80	16%	100	20%	60	11%	50	10%	70	15%	40	7%	30	6%	40	8%	30	7%
Slimbridge	400	60	16%	70	17%	50	11%	40	11%	60	15%	30	8%	10	3%	30	8%	40	9%
Bisley	380	70	20%	90	23%	50	13%	40	10%	50	13%	20	6%	20	5%	20	5%	20	5%
Coaley	320	40	13%	80	25%	40	13%	40	11%	40	14%	20	7%	20	5%	20	5%	20	6%
North Woodchester	300	60	19%	90	29%	40	14%	30	8%	30	10%	20	6%	10	4%	10	4%	20	6%
North Nibley	270	40	15%	80	29%	30	12%	20	9%	40	13%	20	7%	10	4%	10	4%	20	6%
Oakridge Lynch	270	50	20%	60	23%	40	13%	30	10%	30	13%	20	6%	10	5%	10	5%	10	5%
Amberley	250	50	19%	70	29%	40	14%	20	8%	30	10%	20	6%	10	4%	10	4%	20	6%
Horsley	200	30	13%	50	26%	30	15%	10	6%	30	13%	20	9%	10	6%	10	6%	10	7%

* Figures rounded to nearest 10 (May not add, due to rounding). Percentages calculated using un-rounded figures.

- 3.3.7 Bearing in mind that **Table 8** shows several industries grouped into broader ‘sectors’, the results do bear out those depicted in the graph on page 26. Nearly half (47%) of the District’s working residents are employed in education, health/social work and public administration [industries O, P, Q] or in distribution (including retail), hotels/restaurants [industries G, I].
- 3.3.8 As a category of its own, manufacturing [industry C] accounts for 13% of all our residents’ employment. Only 7% of working residents are described as being “process, plant and machine operatives” though (**Table 9**), which suggests that the manufacturing sector provides employment for diverse occupations, including professional, associate professional/technical, skilled trades, administrative and managerial jobs.
- 3.3.9 Whilst the graph on page 26 shows professional, scientific and technical work to be amongst the biggest employment sectors for our District’s residents, this doesn’t seem to be evenly represented across all settlements. Interestingly, all four of the District’s largest settlements (**Stroud, Stonehouse, Cam** and **Dursley**) show below-average proportions of residents working in “financial, real estate, professional and administrative activities” (**Table 8**) or employed in “professional occupations” (**Table 9**).
- 3.3.10 District-wide, 19% of working residents are described as having “professional occupations” and 12% as “associate professional and technical”.

The settlements with the lowest proportion of “professionals” are:

- Hardwicke (13%)
- Newtown & Sharpness (13%)
- Stonehouse (15%)
- Leonard Stanley (15%)
- Cam (16%)
- Berkeley (16%)
- Stroud (17%)
- Slimbridge (17%)
- Dursley (18%)
- Eastington (18%)

By contrast, more than a quarter of all working residents in the following settlements are described as having professional occupations:

- Painswick (29%)
- North Woodchester (29%)
- North Nibley (29%)
- Amberley (29%)
- Chalford (26%)
- Horsley (26%)
- Uley (25%)
- Coaley (25%)

The settlements with the lowest proportion of “associate professional and technical” workers are:

- Stonehouse (10%)
- Eastington (10%)
- Frampton on Severn (10%)
- Newtown & Sharpness (10%)
- Leonard Stanley (10%)
- Dursley (11%)
- Kings Stanley (11%)
- Kingswood (11%)
- Whitminster (11%)
- Slimbridge (11%)

Most other settlements are around the 12% -13% District average. But the following settlements stand out as having a significantly larger proportion of residents with associate professional and technical occupations:

- Painswick (17%)
- Whiteshill & Ruscombe (16%)
- Horsley (15%)

- 3.3.10 A similar socio-economic divide can be seen when looking at where most people with managerial occupations, directors and senior officials tend to live:

The settlements with the lowest proportion are:

- Stonehouse (9%)
- Dursley (9%)
- Newtown & Sharpness (9%)
- Stroud (10%)
- Cam (11%)
- Manor Village (11%)

The settlements with the highest proportion are:

- Bisley (20%)
- Oakridge Lynch (20%)
- Amberley (19%)
- North Woodchester (19%)
- Painswick (19%)
- Minchinhampton (17%)
- Chalford (17%)

- 3.3.11 The District's smallest employment sector is agriculture and utilities [industries A, B, D, E, which includes agriculture, forestry and fishing, energy, water and utilities, mining and quarrying]. But there is significant variation from settlement to settlement. Perhaps surprisingly, this doesn't necessarily reflect the rurality or remoteness of a settlement (although many of these industries are land-based); but it does seem to reflect socio-economic differences:

The settlements with the highest proportion of residents working in agriculture and utilities are:

- Newtown & Sharpness (10%)
- Berkeley (9%)
- Slimbridge (9%)

The settlements with the lowest proportion of residents working in agriculture and utilities are:

- Chalford (2%)
- North Woodchester (2%)
- Amberley (2%)

- 3.2.12 The four main settlements have broadly similar profiles, although **Stonehouse** stands out as having a particularly high reliance on manufacturing and **Dursley** has a particularly small proportion of residents working in finance, real estate, professional and administrative activities:

Stroud:

Stroud is fairly close to the District average in terms of the proportion of people working in each employment sector. The biggest employment sector (29%) is public administration, education and health, which is representative of the District as a whole. The proportion of residents working in financial, real estate, professional and administrative activities is slightly below average, and roughly equal to the number employed in manufacturing. Like the three other major towns, Stroud has a below-average representation of professional occupations, managers, directors or senior officials amongst its resident working population.

Stonehouse:

A greater-than-average proportion of Stonehouse residents work in manufacturing: at 17% this is 4% above the District average, and the highest figure of all settlements in this study. Stonehouse also stands out as having the District's highest proportion of process, plant and machine operatives amongst its working residents (11%), combined with very low proportions of professionals, managers, directors and senior officials. The proportion of people employed in caring, leisure and other service occupations is above average. All the other employment sectors and occupations are fairly average, or just 1-2% above/below the District average.

Cam:

Cam also has an above-average proportion of residents employed in manufacturing (16%). Slightly fewer residents than average are employed in public administration, education or health, but this remains the largest sector, as elsewhere in the District. Amongst the District's largest settlements, Cam has the greatest proportion of workers in agriculture/utilities (6%).

Dursley:

Along with Berkeley, Dursley has the lowest proportion of residents working in financial, real estate, professional and administrative activities (just 13%); it also has amongst the lowest proportion of Managers, directors and senior officials living in the town. Like Cam, Dursley has an above-average

proportion of residents employed in manufacturing (16%). In most other respects, Dursley's working population is very representative of the District average.

- 3.2.13 Whilst in many ways, the four main towns fit quite closely to the District average, places like **Minchinhampton, Chalford, Painswick, Bisley, North Woodchester, Amberley and Oakridge Lynch** show much greater polarisation: they generally have an over-representation of professionals, managers, directors and senior officials amongst their resident population; and a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives.

Jobs and businesses based within each settlement

- 3.2.14 The graph on page 26 shows that there is a net outflow of workers from the District: i.e. there are more working residents travelling out of the District to their place of work than there are workers travelling into the District from elsewhere.
- 3.2.15 Nevertheless, there are still more than 50,000 jobs on offer within the District (according to the 2011 census). The *Inter Departmental Business Register*¹¹ has data about the number of businesses operating in the District. In March 2010, Stroud District as a whole had 5,215 active "Enterprises"; and in 2011, there were 5,810 "Local Units" in Stroud District.
- An *Enterprise* is defined as a business with a degree of autonomy - usually a head office - which may or may not have multiple sites, or "Local Units".
 - A *Local Unit* is defined as an individual site (such as a shop or a factory), located in a geographically identifiable place.
- 3.2.16 Looking at what sorts of jobs and businesses these are, and where they tend to be concentrated, can be enlightening. It can help us to build up a picture of where the greatest mis-matches exist between the jobs based here and the characteristics of our resident workforce, and suggest reasons why some people are commuting great distances to work. It can also highlight areas and sectors where the District is particularly strong in its employment offer, or where the jobs actually match the resident workforce quite well.
- 3.2.17 Over the following pages, **Table 10** and **Table 11** use data from the *Interdepartmental Business Register* and from the 2011 census to show the number of jobs and the number of businesses based in different parts of the District¹². The total numbers of jobs and businesses in each area are broken down into employment sectors, so it is possible to see how different industries are distributed around the District and the type and volume of jobs that are on offer in particular places.
- 3.2.18 This baseline information can also be used to give a broad indication of how 'robust' (or how vulnerable) the employment role of particular settlements might be in the face of future changes to the local economy. Stroud District's latest employment study (2104) includes a series of forecasts by Oxford Economics about the likely future growth of the District's workforce, based on how particular industries are likely to evolve between 2012 and 2031.

¹¹ Data from the Inter Departmental Business Register is available through the Office for National Statistics (ONS).

¹² Neither of these datasets is available at Lower Super Output Area. Unlike the smaller LSOAs (which form the basis of all the data tables in this report up to this point), most of the District's Middle Super Output Areas (MSOAs) cover more than one settlement, and some incorporate large areas of rural land as well. It is less easy to 'isolate' and apportion data from a MSOA to one or two specific settlements (particularly where it comes to topics such as the location of particular types of business units, rather than say a straight-forward population count). So **Tables 10** and **11** are not broken down into individual settlements; instead, all the settlements located within each MSOA have been listed. So these tables give a more general picture of the District's employment geography.

3.2.19 Overall, Oxford Economics predicts a small increase in the District’s workforce by 2031. But the number of workers in some sectors is predicted to shrink – in some cases as a result of ‘efficiency’ (fewer workers producing the same or greater output) and in some cases because of industry decline.

The following sectors are projected to see a growing workforce within Stroud District:

- Construction
- Transportation and storage
- Wholesale and retail
- Hotels and catering
- Information and communication
- Real estate / property
- Professional, scientific and technical services
- Business administration and support services
- Arts entertainment and research

The following sectors are projected to see a reducing workforce within Stroud District:

- Agriculture, forestry and fishing
- Utilities
- Manufacturing
- Public administration
- Education
- Health and social work

3.2.20 By comparing the characteristics of the 2011 workforce in different parts of the District with industry growth forecasts, it is possible to get an indication of areas/settlements that might see a decline in the number of people working there during the period up to 2031. Locating future *growth* is less easy to do, geographically: growing businesses are perhaps more likely to move premises, while new business start-ups could happen anywhere (and this can of course be influenced by policy decisions about where new development will be sited and what type it will be). But this exercise could certainly give a picture of whether particular areas or settlements have a healthy and resilient employment role, or one that might be challenged by their reliance on industries in decline and/or industries which may see a shrinking workforce.

Key to Table 10: Growing and declining employment sectors in each settlement/group of settlements

	A growing workforce is projected in these industry sectors *		A shrinking workforce is projected in these industry sectors*
↑	At least 10% of the area’s businesses (“local units”) are based in this growth sector	↓	At least 10% of the area’s businesses (“local units”) are based in this declining sector
↑↑	At least 15% of the area’s businesses (“local units”) are based in this growth sector	↓↓	At least 15% of the area’s businesses (“local units”) are based in this declining sector
↑↑↑	At least 20% of the area’s businesses (“local units”) are based in this growth sector	↓↓↓	At least 20% of the area’s businesses (“local units”) are based in this declining sector

* Stroud District employment study 2014 (Oxford Economics projections 2012-2031)

NOTE: For some reason the data series used in **Table 10** (from the Inter Departmental Business Register) does not count the number of businesses based in energy, water and utilities (industries B, D and E).

Key to Table 11: Jobs/workforce growth in each settlement/group of settlements, by employment sector

	A growing workforce is projected in these industry sectors *		A shrinking workforce is projected in these industry sectors*
↑	At least 10% of the area’s jobs are based in this growth sector	↓	At least 10% of the area’s jobs are based in this declining sector
↑↑	At least 15% of the area’s jobs are based in this growth sector	↓↓	At least 15% of the area’s jobs are based in this declining sector
↑↑↑	At least 20% of the area’s jobs are based in this growth sector	↓↓↓	At least 20% of the area’s jobs are based in this declining sector

* Stroud District employment study 2014 (Oxford Economics projections 2012-2031)

Table 10 : Growing and declining employment sectors in each settlement/group of settlements (ONS/Interdepartmental Business Register 2011)

Number of businesses (“Local Units”) in each area, categorised by broad industry <i>(rounded to nearest 5)</i>	MSOA 006 Stroud (central)	MSOA 004 Stroud (Cainscross) Whiteshill & Ruscombe <i>(Randwick)</i>	MSOA 007 Stroud (R’borough) Brimscombe (see also 008 and 010)	MSOA 005 Stonehouse	MSOA 011 Cam	MSOA 014 Dursley	MSOA 012 Berkeley Newtown & Sharpness <i>(Newport, Stone, Stinchombe)</i>	MSOA 015 Wotton Kingswood North Nibley <i>(Hillesley)</i>
Agriculture, forestry and fishing [A]	10	10	10	0	10	10	↓↓↓ 75	↓ 60
Manufacturing / production [C]	40	15	↓↓↓ 70	↓↓↓ 65	↓ 25	10	30	20
Construction [F]	45	↑↑↑ 55	↑ 40	↑ 60	↑↑ 40	20	↑ 50	↑ 40
Retail, wholesale and motor trades [G]	↑↑↑ 170	↑ 35	↑↑↑ 90	↑↑ 80	↑↑ 40	↑↑ 50	↑ 55	↑↑ 70
Accommodation and food services [I]	50	5	15	20	5	15	20	25
Transport and storage (including postal) [H]	15	10	10	15	10	5	10	10
Information and communication [J]	45	15	20	15	20	20	15	20
Finance and insurance [K]	15	0	5	10	0	10	5	10
Property / real estate [L]	25	5	15	15	5	10	10	5
Professional, scientific and technical [M]	↑ 95	↑ 35	↑↑ 60	↑ 60	↑↑ 35	↑↑ 40	35	↑↑ 70
Business administration and support services [N]	45	20	30	35	5	15	30	25
Public administration and defence [O]	10	5	0	5	5	5	0	5
Education [P]	20	10	10	15	10	5	10	10
Health and social work [Q]	↓ 75	20	10	20	15	20	15	15
Arts, entertainment, recreation and other services [R, S]	65	20	20	15	15	↑ 25	20	30
Total number of “local units” in each area:	725	260	405	430	240	260	380	415
% share of all the units in the District:	Stroud total: 1,390 (24% of all units in the District)			7%	4%	4%	7%	7%
↑↓ Industry sector ‘robustness’ indicator:	+4 -1 = 3	+5 = 5	+6 -2 = 4	+4 -2 = 2	+6 -2 = 4	+4 = 4	+2 -3 = -1	+5 -1 = 4

Number of businesses (“Local Units”) in each area, categorised by broad industry (rounded to nearest 5)	MSOA 013 Nailsworth Horsley	MSOA 010 Minchinhampton; part of Brimscombe (see also 008, 007) North Woodchester Amberley (Box and South Woodchester)	MSOA 003 Frampton on Severn Eastington Slimbridge Whitminster (Arlingham, Saul and Cambridge)	MSOA 002 Bisley Painswick Oakridge Lynch a small part of Manor Village (see also 008) (Cranham, Eastcombe and Sheepscombe)	MSOA 008 Chalford part of Brimscombe (see also 007, 010) Manor Village (see also 002) (France Lynch, Bussage)	MSOA 009 Coaley Uley Kings Stanley Leonard Stanley (Nympsfield, Middleyard and Selsley)	MSOA 001 Hardwicke Upton St Leonards Hunts Grove (emerging) (Brookthorpe, Haresfield and Longney & Epney)
Agriculture, forestry and fishing [A]	10	15	↓ ↓ ↓ 85	↓ ↓ ↓ 75	10	↓ ↓ ↓ 45	↓ ↓ ↓ 60
Manufacturing / production [C]	35	35	35	25	↓ 30	15	20
Construction [F]	35	↑ 60	↑ 45	↑ 45	↑ 40	↑ ↑ 40	↑ 50
Retail, wholesale and motor trades [G]	↑ ↑ ↑ 85	↑ ↑ 65	↑ ↑ 70	↑ 45	↑ 40	↑ 35	↑ 45
Accommodation and food services [I]	20	15	25	30	10	10	15
Transport and storage (including postal) [H]	10	5	25	5	5	5	25
Information and communication [J]	30	35	25	35	25	20	20
Finance and insurance [K]	10	5	0	5	5	0	5
Property / real estate [L]	15	10	10	10	10	5	10
Professional, scientific and technical [M]	↑ ↑ 65	↑ ↑ ↑ 85	↑ 45	↑ ↑ 90	↑ ↑ ↑ 75	↑ 35	↑ 45
Business administration and support services [N]	35	30	30	30	25	20	15
Public administration and defence [O]	0	0	0	5	0	0	0
Education [P]	5	15	10	15	10	10	10
Health and social work [Q]	25	20	10	15	10	15	10
Arts, entertainment, recreation and other services [R, S]	30	30	30	40	20	20	20
Total number of “local units” in each area:	410	425	445	470	315	275	350
% share of all the units in the District:	7%	7%	8%	8%	5%	5%	6%
↑ ↓ Industry sector ‘robustness’ indicator:	+5 = 5	+6 = 6	+4 -2 = 2	+4 -2 = 2	+5 -1 + 4	+4 -2 = 2	+3 -2 = 1

Table 11: Jobs / workforce growth in each settlement/group of settlements, by employment sector (Census 2011)

Workforce: number of people employed in each broad industry in each area	MSOA 006 Stroud (central)	MSOA 004 Stroud (Cainscross) Whiteshill & Ruscombe (Randwick)	MSOA 007 Stroud (R'borough) Brimscombe (see also 008 and 010)	MSOA 005 Stonehouse	MSOA 011 Cam	MSOA 014 Dursley	MSOA 012 Berkeley Newtown & Sharpness (Newport, Stone, Stinchcombe)	MSOA 015 Wotton Kingswood North Nibley (Hillesley)
Agriculture, forestry and fishing [A]	24	20	21	20	11	13	103	86
Energy, water, utilities [B, D, E]	165	31	103	322	49	18	↓↓↓ 483	23
Manufacturing / production [C]	303	192	↓↓↓ 774	↓↓↓ 2,927	↓↓↓ 387	↓↓↓ 386	216	↓↓↓ 999
Construction [F]	426	↑ 385	↑ 315	640	↑ 218	194	↑ 377	306
Retail, wholesale and motor trades [G]	↑↑ 1,457	262	↑↑↑ 651	↑ 755	↑↑ 377	↑↑ 379	↑ 352	↑ 458
Accommodation and food services [I]	400	96	91	218	49	73	226	124
Transport and storage (including postal) [H]	273	78	89	137	126	42	120	64
Information and communication [J]	242	73	164	211	80	81	74	90
Finance and insurance [K]	343	34	58	84	32	66	41	68
Property / real estate [L]	115	52	20	64	15	31	27	35
Professional, scientific and technical [M]	371	167	306	421	68	139	204	↑ 475
Business administration and support services [N]	237	127	132	314	80	75	119	122
Public administration and defence [O]	355	↓ 335	34	96	24	76	45	55
Education [P]	↓ 993	↓↓ 442	170	622	↓ 210	↓ 298	189	↓ 434
Health and social work [Q]	↓↓↓ 1,477	↓ 407	175	335	175	↓↓↓ 399	261	292
Arts, entertainment, recreation and other services [R,S]	444	130	114	110	75	144	143	126
Total size of workforce in each area:	7,631	2,834	3,224	7,278	1,981	2,417	2,981	3,760
% share of the District's total workforce:	Stroud total: 13,689 (27% of jobs in the District)			14%	4%	5%	6%	7%
↑↓ Job sector 'robustness' indicator:	+2 -3 = -1	+1 -4 = -3	+4 -3 = 1	+1 -3 = -2	+3 -4 = -1	+2 -5 = -3	+2 -2 = 0	+2 -4 = -1

Workforce: number of people employed in each broad industry in each area	MSOA 013 Nailsworth Horsley	MSOA 010 Minchinhampton; part of Brimscombe (see also 008, 007) North Woodchester Amberley (Box and South Woodchester)	MSOA 003 Frampton on Severn Eastington Slimbridge Whitminster (Arlingham, Saul and Cambridge)	MSOA 002 Bisley Painswick Oakridge Lynch a small part of Manor Village (see also 008) (Cranham, Eastcombe and Sheepscombe)	MSOA 008 Chalford part of Brimscombe (see also 007, 010) Manor Village (see also 002) (France Lynch, Bussage)	MSOA 009 Coaley Uley Kings Stanley Leonard Stanley (Nympsfield, Middleyard and Selsley)	MSOA 001 Hardwicke Upton St Leonards Hunts Grove (emerging) (Brookthorpe, Haresfield and Longney & Epney)
Agriculture, forestry and fishing [A]	18	34	166	77	9	76	99
Energy, water, utilities [B, D, E]	14	40	137	29	20	16	21
Manufacturing / production [C]	217	↓ ↓ ↓ 582	311	163	↓ ↓ ↓ 243	↓ 183	↓ 326
Construction [F]	192	↑ 305	↑ 525	↑ 289	↑ 190	↑ 191	↑ 297
Retail, wholesale and motor trades [G]	↑ ↑ 490	↑ 324	↑ 528	217	↑ 187	↑ 175	↑ ↑ 436
Accommodation and food services [I]	187	188	258	↑ 295	58	76	222
Transport and storage (including postal) [H]	78	71	↑ 455	39	23	24	242
Information and communication [J]	75	133	68	125	102	52	68
Finance and insurance [K]	43	20	38	36	33	18	58
Property / real estate [L]	52	32	18	42	16	17	15
Professional, scientific and technical [M]	208	280	107	231	138	141	88
Business administration and support services [N]	155	110	185	202	102	55	105
Public administration and defence [O]	31	40	64	↓ 289	23	31	36
Education [P]	↓ 385	↓ 317	199	↓ 300	↓ 151	↓ 172	↓ 285
Health and social work [Q]	↓ 285	↓ ↓ ↓ 519	↓ 396	↓ 317	130	↓ ↓ ↓ 242	148
Arts, entertainment, recreation and other services [R,S]	195	121	269	178	134	80	109
Total size of workforce in each area:	2,981	3,122	3,726	2,837	1,560	1,551	2,562
% share of the District's total workforce:	6%	6%	7%	6%	3%	3%	5%
↑ ↓ Job sector 'robustness' indicator:	+2 -2 = 0	+2 -5 = -3	+3 -1 = 2	+2 -3 = 2	+2 -3 + -1	+2 -4 = -2	+3 -2 = 1

Employment sectors: conclusions and sensitivity to future change

3.2.21 **Table 7** on page 24 shows the following settlements to have the biggest concentration of jobs:

Providing 2,000+ jobs each:

- Stroud (11,720)
- Stonehouse (7,280)
- Dursley
- Nailsworth
- Cam

Providing 1,000-2,000 jobs each:

- Wotton-Under-Edge
- Minchinhampton (mostly outside the settlement)
- Brimscombe
- Hardwicke
- Kingswood

But the 'employment profile' (the types of jobs provided at each settlement) differs quite significantly from place to place.

3.2.22 According to Oxford Economics' projections, manufacturing is forecast to see the biggest fall in job numbers (including due to 'efficiency savings'). Settlements with a high dependence on manufacturing for their job supply are likely to be amongst the most vulnerable to future economic fluctuations and/or the continuation of current employment trends in this sector. These include:

- | | |
|-------------------------------|---------------------|
| • Stonehouse | • Chalford |
| • Wotton-Under-Edge/Kingswood | • Dursley |
| • Cam | • North Woodchester |
| • Stroud/Brimscombe | |

Cam, Stonehouse, Dursley and **Wotton-Under-Edge** also have a relatively high proportion of residents working in manufacturing (see **Table 8** on page 28). Many may work very close to home (within settlement). Any fall in job numbers could have a significant proportional effect on the resident population in these places.

3.2.23 The sectors forecast to see the biggest job growth are 'professional, scientific and technical' and 'business administration and support services'.

The following settlements/groups of settlements have a high concentration of professional, scientific and technical jobs:

- Stroud/Rodborough/Cainscross/Brimscombe (800+)
- Stonehouse (400+)
- Wotton-Under-Edge / Kingswood (400+)

The following settlements/groups of settlements have a high concentration of administration and support services jobs:

- Stroud/Rodborough/Cainscross/Brimscombe (nearly 500)
- Stonehouse (300+)
- Bisley/Painswick/Oakridge (200+)

However, these numbers only account for a fairly small proportion of all the jobs available in each place (i.e. the settlements do not rely heavily on these particular sectors), with the exception of **Wotton/Kingswood**, where at least 10% of all the jobs based in the area are professional/scientific/technical.

3.2.24 Significant job increases are also forecast in construction and wholesale/retail. In all settlements, these sectors account for a much greater proportion of the existing jobs available: most settlements are likely to feel the benefit of these growing industries. It seems probable, though, that most new retail jobs will tend to be concentrated in the settlements with larger retail bases (town centres particularly). **Stroud, Stonehouse, Dursley, Wotton-Under-Edge** and **Nailsworth** may benefit most.

3.2.25 **Stroud:**

Stroud/Rodborough/Cainscross (together with Brimscombe and Whiteshill & Ruscombe) clearly represents the District's biggest employment base. A quarter of the District's business units are

based within this area, and 27% of the District's jobs are located here. Although the robustness of the retail and wholesale sector offers this area a degree of stability, Stroud shows some vulnerability because of the concentration of public sector, education and healthcare jobs here. However, the relatively high proportion of jobs based in public administration, education and health does suit the resident population, 29% of whom are employed within these sectors (see **Table 8**).

Around 800 "professional, scientific and technical" jobs are based in and around the Stroud town, and this is a sector forecast to grow. Growth is also forecast in arts, entertainment and other leisure services. This is a relatively minor employment sector in all the District's settlements, representing less than 10% of the jobs based in each place. However, Stroud has a high concentration of arts, entertainment and recreation jobs (nearly 600) and may be well placed to see job growth.

3.2.26 **Stonehouse:**

Stonehouse relies heavily on manufacturing, both in terms of the jobs it has on offer and as a key employment sector for its residents. Whilst the District's manufacturing job numbers are forecast to decline, professional, scientific and technical jobs are predicted to increase. Whilst this sector currently accounts for fewer than 10% of the jobs based in Stonehouse, the 60 professional, scientific and technical businesses based here represent a significant presence – if they were to grow and remain local, this could be of benefit to Stonehouse's jobs market. Stonehouse may also benefit from growth in construction and retail, wholesale and motor trades.

3.2.27 **Cam:**

Cam also has an above-average proportion of residents employed in manufacturing (16%) and shows a similar vulnerability to Stonehouse – perhaps more so, proportionally, given the smaller numbers involved. But Cam also shows strength in the fact that almost half its businesses are based in sectors that are forecast to see job growth: construction; retail, wholesale and motor trades; and professional, scientific and technical. If these businesses were to grow and yet be able to stay locally-based, Cam could benefit from increased job numbers.

3.2.28 **Dursley:**

Dursley appears to be slightly less reliant on manufacturing as a source of local jobs than the other three main settlements (although an above-average proportion of Dursley residents are employed in this sector). Like Stroud, though, Dursley shows some vulnerability because of the concentration of public administration and education jobs here. But almost 45% of the town's business units are based in job growth sectors: retail, wholesale and motor trades (which currently accounts for more than 15% of Dursley's jobs); professional, scientific and technical (a relatively small employment base though: around 140 jobs); and arts, entertainment, recreation and other services (again, employing only around 140 people). It seems probable that most new retail jobs will tend to be concentrated in the settlements with larger retail bases, such as Dursley's town centre.

3.4 Travel to work patterns

3.4.1 We have looked (in section 3.2 and section 3.3) at which settlements have the strongest employment role, in terms of providing the greatest numbers of jobs. And we have looked (in section 3.3) at the sorts of jobs done by residents of each settlement, and the sorts of jobs on offer in each settlement.

3.4.2 **Table 7** on page 24 shows the following settlements draw the greatest numbers of workers into them (i.e. they are the District's biggest employment 'hubs'):

Providing 2,000+ jobs each:

- Stroud (11,720)
- Stonehouse (7,280)
- Dursley
- Nailsworth
- Cam

Providing 1,000-2,000 jobs each:

- Wotton-Under-Edge
- Minchinhampton (mostly outside the settlement)
- Brimscombe
- Hardwicke
- Kingswood

3.4.3 By contrast, **Table 7** also shows that the following settlements have around twice as many residents available to work than there are jobs available. Hence, despite the fact that several of these settlements are also employment 'hubs' (highlighted in bold text), their *principal* role is as a 'dormitory', where most people commute to work:

- | | |
|--|--|
| <ul style="list-style-type: none"> • Manor Village • Whiteshill & Ruscombe • Kings Stanley • Leonard Stanley • Cam | <ul style="list-style-type: none"> • Coaley • Hardwicke • Wotton Under Edge • Uley • Chalford |
|--|--|

3.4.4 So how far do most people travel to work? Which settlements seem to offer residents the best opportunity to live and work within a very local catchment, and which settlements see the biggest out-commutes (or in-commutes)?

3.4.5 Is it possible to tell why this might be? . It may be because of a simple geographic fact (remoteness of settlement), or perhaps because of a mis-match between the types of jobs on offer locally and the characteristics and skills of the resident workforce.

3.4.6 Across the District as a whole, the vast majority of working residents (44%) commute between 5km and 40km to their place of work. A significant minority (27%) travel less than 5km to work , and a relatively small proportion (5%) travel more than 40km – which in many cases means commuting out of the District (and in some cases, well beyond the county). But there is certainly considerable variation in the average commute from settlement to settlement. **Table 12** shows the percentage of working residents from each settlement who work very locally (within 2km or within 5km of home), contrasted with the percentage who have large out-commutes (40km+). It is interesting to compare this to the District average and see the variation between settlements:

Key to Table 12

	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

Table 12: Travel to work patterns for residents of each settlement

Settlements in the Hierarchy (CP3)	% of working residents based mainly at / from home *	Local working		Out-commuting	
		% of working residents travelling less than 2km (i.e. within settlement) *	% of working residents travelling between 2km and 5km (i.e. very local) *	% of working residents travelling between 40km and 60km (i.e. to surrounding towns and cities)*	% of working residents travelling more than 60km (i.e. long distance commuting) *
Stroud District Totals / Average :	14%	14%	13%	2%	3%
Stroud	11%	21%	18%	2%	3%
Stonehouse	8%	25%	15%	2%	2%
Cam	10%	16%	9%	2%	3%
Dursley	10%	17%	8%	2%	3%
Berkeley	12%	12%	10%	1%	3%
Wotton Under Edge	12%	18%	7%	2%	3%
Nailsworth	15%	17%	10%	1%	4%
Minchinhampton	21%	9%	15%	2%	6%
Frampton on Severn	17%	7%	8%	3%	3%
Amberley	25%	8%	19%	2%	6%
Bisley	28%	6%	10%	3%	5%
Brimcombe	18%	9%	18%	3%	4%
Chalford	19%	7%	10%	2%	5%
Coaley	21%	2%	14%	1%	4%
Eastington	18%	9%	11%	2%	3%
Hardwicke	11%	11%	8%	3%	3%
Horsley	21%	13%	8%	1%	4%
Kingswood	19%	8%	8%	1%	5%
Kings Stanley	13%	10%	25%	2%	4%
Leonard Stanley	12%	11%	25%	1%	3%
Manor Village	12%	8%	17%	2%	3%
Newtown & Sharpness	12%	10%	12%	1%	3%
North Nibley	21%	6%	13%	2%	3%
North Woodchester	25%	8%	19%	2%	6%
Oakridge Lynch	28%	6%	10%	3%	5%
Painswick	26%	5%	7%	4%	7%
Slimbridge	19%	5%	8%	2%	4%
Uley	19%	3%	11%	1%	4%
Upton St Leonards	14%	7%	19%	6%	3%
Whiteshill & Ruscombe	17%	8%	23%	2%	4%
Whitminster	17%	6%	11%	2%	3%

* Census 2011. Percentages for each settlement have been estimated by aggregating the figures for census Lower Super Output Areas (LSOAs). They must therefore be viewed as indicative, rather than factually exact. Please refer to APPENDIX 2 for further details of the methodology used.

3.4.7 The vast majority of the District's working residents have a commute of between 5km and 40km (3 – 25 miles), which for most settlements puts major employment hubs such as Gloucester, Cheltenham, Swindon and Bristol within reach, as well as Stroud and Stonehouse.

3.4.8 What really stands out in **Table 12** is the difference between six of the largest settlements (at the top of the list) and all the other settlements when it comes to local working:

- Stroud
- Stonehouse
- Wotton Under Edge
- Cam
- Dursley
- Nailsworth

These settlements all show a much higher than average proportion of their residents working within 2km (1.2 miles) of home (effectively this means that most of them are living and working within the same settlement). This is unsurprising, given that these settlements are amongst the District's biggest employment hubs. Apart from **Stroud** and **Stonehouse**, these settlements also show a lower than average proportion of people travelling between 2km-5km – which means that very few people are out-commuting to neighbouring smaller settlements. Those that *are* commuting are tending to travel further afield: if there is no job 'match' within the home settlement, and small neighbouring settlements do not have many jobs on offer, then a longer commute to another big settlement seems more likely.

3.4.9 The following settlements all show a much higher than average proportion of their working residents commuting between 2-5km (1.2-3 miles) to their place of work:

- Kings Stanley (close to Stonehouse and Stroud)
- Leonard Stanley (close to Stonehouse and Stroud)
- Whiteshill & Ruscombe (close to Stroud)
- North Woodchester (close to Stroud, Nailsworth, Minchinhampton)
- Amberley (close to Stroud, Nailsworth, Brimscombe, Minchinhampton)
- Upton St Leonards (close to Gloucester, Brockworth etc)
- Stroud (close to Brimscombe, Stonehouse)
- Brimscombe (close to Stroud, Minchinhampton)
- Manor Village (close to Brimscombe)

This is likely to be because all these settlements are located conveniently close to major employment 'hubs'.

3.4.10 District-wide, a relatively small proportion of residents travel long distances to work (more than 40km/25miles). Just 2% of the District's working population commute between 40km and 60km, and most settlements are pretty close to this average. **Painswick** and **Upton St Leonards** stand out as having the highest proportion of commuters within this bracket.

3.4.12 3% of the District's working population travel further than 60km (approx 40+ miles). Again, most settlements are fairly close to this average. Higher proportions are seen amongst workers living in the following settlements:

- Painswick
- Minchinhampton
- North Woodchester
- Amberley
- Bisley
- Chalford
- Oakridge Lynch
- Kingswood

Almost all of these are settlements have above average or exceptionally high proportions of professionals, managers, directors and senior officials amongst their resident population (see **Table 8** on page 28). Most of these settlements also have very high proportions of people who work from home.

3.4.13 So where exactly are most of our residents travelling to? And why might this be?

Table 13: Travel to work patterns: workplace destinations for residents of each settlement/group of settlements (Census 2011)

JOURNEY ORIGIN (place of residence):		JOURNEY DESTINATION (workplace):													
Settlements in the Hierarchy (CP3)	Census Middle Super Output Area *	Total number of journeys to work	Within Stroud District	Within county: Cheltenham	Within county: Gloucester	Within county: Cotswold District	Within county: Forest of Dean	Within county: Tewkesbury Borough	Out of county: North (including Birmingham)	Out of county: East (including London and South East)	Out of county: Bristol, Bath, S.Glos, North Somerset	Out of county: South of Bristol and Wiltshire	Wiltshire (excluding Swindon)	Swindon	Wales
Stroud District Totals / Average :		44,324	54%	4%	12%	5%	1%	4%	2%	3%	11%	0.3%	1%	1%	0.4%
Stroud (central)	MSOA 006	4,559	65%	5%	10%	5%	0.4%	4%	1%	2%	5%	0.2%	1%	1%	0.4%
Stroud (Cainscross); Whiteshill & Ruscombe	MSOA 004	4,629	65%	3%	12%	5%	0.5%	4%	1%	2%	5%	0.3%	1%	1%	0.3%
Stroud (Rodbrorough); Brimscombe (see also MSOAs 008 and 010)	MSOA 007	2,823	60%	5%	10%	7%	0.5%	3%	2%	3%	5%	0.4%	2%	1%	0.5%
Stonehouse	MSOA 005	3,305	66%	3%	12%	4%	1%	5%	2%	2%	5%	0.2%	1%	1%	0.1%
Cam	MSOA 011	3,328	59%	2%	10%	2%	1%	3%	1%	2%	18%	0.4%	1%	1%	0.3%
Dursley	MSOA 014	2,723	57%	2%	9%	4%	1%	2%	2%	2%	19%	0.2%	1%	1%	0.5%
Berkeley; Newtown & Sharpness	MSOA 012	2,439	46%	2%	8%	2%	2%	3%	2%	2%	32%	0.5%	1%	0.3%	1%
Wotton Under Edge; Kingswood; North Nibley	MSOA 015	3,307	43%	2%	4%	4%	0.2%	2%	2%	2%	38%	1%	1%	1%	1%
Nailsworth; Horsley;	MSOA 013	2,518	59%	3%	7%	11%	0.3%	3%	2%	3%	7%	0.2%	3%	2%	0.2%

JOURNEY ORIGIN (place of residence):		JOURNEY DESTINATION (workplace):													
Settlements in the Hierarchy (CP3)	Census Middle Super Output Area *	Total number of journeys to work	Within Stroud District	Within county: Cheltenham	Within county: Gloucester	Within county: Cotswold District	Within county: Forest of Dean	Within county: Tewkesbury Borough	Out of county: North (including Birmingham)	Out of county: East (including London and South East)	Out of county: Bristol, Bath, S.Glos, North Somerset	Out of county: South of Bristol and Wiltshire	Wiltshire (excluding Swindon)	Swindon	Wales
Stroud District Totals / Average :		44,324	54%	4%	12%	5%	1%	4%	2%	3%	11%	0.3%	1%	1%	0.4%
Minchinhampton; part of Brimscombe (see also MSOAs 008 and 007; North Woodchester; Amberley	MSOA 010	1,955	52%	4%	9%	11%	1%	3%	3%	2%	5%	0.2%	0.4%	1%	0.3%
Frampton on Severn; Eastington; Slimbridge; Whitminster	MSOA 003	2,553	51%	6%	16%	3%	1%	4%	3%	3%	5%	0.3%	1%	1%	0.4%
Bisley; Painswick; Oakridge Lynch; a small part of Manor Village (see also MSOA 008)	MSOA 002	1,876	42%	11%	16%	7%	0.4%	5%	2%	7%	5%	0.3%	1%	1%	0.5%
Chalford; part of Brimscombe (see also MSOAs 007 and 010); Manor Village (see also MSOA 002)	MSOA 008	2,530	51%	6%	11%	13%	0.4%	4%	2%	4%	5%	0.3%	2%	3%	0.1%
Coaley; Uley; Kings Stanley; Leonard Stanley	MSOA 009	2,400	60%	5%	11%	4%	1%	4%	2%	3%	9%	0.4%	1%	1%	1%
Hardwicke; Upton St Leonards; Hunts Grove (emerging)	MSOA 001	3,379	23%	9%	41%	2%	1%	12%	3%	2%	5%	0.2%	0.4%	1%	0.3%

* Census 2011. This dataset is available by 'Middle Super Output Area'. Unlike the smaller LSOAs (which form the basis of most of the data tables in this report up to this point), most of the District's Middle Super Output Areas (MSOAs) cover more than one settlement, and some incorporate large areas of rural land as well. It is not easy to 'isolate' and apportion data from a MSOA to one or two specific settlements. So the travel-to-work data used in this table is not broken down into individual settlements; instead, all the settlements located within each MSOA have been listed. So these tables give a more general picture of the District's commuting geography.

Key to Table 13

	+ 20% or more above the District Average
	+ 4% or more above the District Average
	+ 1% - 3% above the District average
	= the Stroud District average
	- 1% - 2% below the District average
	- 3% or more below the District average

3.4.14 **Table 13** bears out the indications from **Table 12** about the high proportion of **Stroud, Stonehouse, Cam, Dursley** and **Nailsworth** residents who work within (or very close to) their home town.

3.4.15 At the other extreme, a high proportion of people living in and around the following settlements commute out of the District to work:

- **Bisley, Painswick, Oakridge Lynch:** only 42% of working residents have jobs based within the District. A much higher proportion than average commute to Cheltenham, Gloucester and out of the County to the South East (including London).
- **Berkeley, Newtown & Sharpness; Wotton Under Edge, Kingswood and North Nibley:** Again, the proportion of residents working within the District is below average, as are the proportions travelling to Cheltenham and Gloucester. This is accounted for by the fact that both these areas have more than 3 times the average proportion of commuters travelling south to Bristol, South Gloucestershire, Bath and North Somerset.
- **Hardwicke, Upton St Leonards and Hunts Grove:** This area has by far the lowest proportion of residents who work within Stroud District: just 23%, compared to the District average of 54%. Evidently, the proximity to Gloucester is the key factor: Gloucester is a net importer of workers, on a huge scale, and there are major employment areas at Quedgeley and Waterwells. 41% of working residents from this part of Stroud District commute to Gloucester. 'Gloucester Business Park' in Brockworth is just over the District boundary in Tewkesbury Borough, which also partially explains the much higher-than-average proportion of people travelling to work there.

3.4.16 These results clearly illustrate how residents of settlements lying closer to the District's borders do tend to travel north, south or east.

3.4.17 But the presence or proximity of transport infrastructure to a settlement (rail stations, motorway junctions) does not in itself seem to distort the commuting habits of the settlement's residents. **Stroud, Stonehouse** and **Cam** are the only settlements in the District with rail stations. None of these settlements shows unusually high levels of long-distance commuting (**Table 12**), although the presence of a rail station may ease mid-distance commuting to Gloucester, Swindon and Bristol: **Cam** and **Dursley** do show above-average journeys southwards to Bristol etc. **Stroud** and **Stonehouse** may be less affected due to the lack of a direct rail link to Bristol. Of course, these stations do not solely serve the population of the settlement in which they are located: many people from other settlements will drive, cycle or take a bus to one of these stations and travel on from there.

3.4.13 But are the same influences and trends working the other way around (i.e. in-commuting)? Which of our District's settlements draw workers in from furthest away, and which seem to provide employment for a much more local catchment? **Table 14** (on the following pages) compares travel-to-work distances for in-commuters and out-commuters:

Table 14:

Distance travelled out to work by local residents

Distance travelled in to their workplace by the local workforce

Settlements in the Hierarchy (CP3)	Census Middle Super Output Area #	Average distance travelled out to work by local residents	Local working		% of resident workers travelling between 5km and 40km to work (i.e. mostly within the District)	Out-commuting		Average distance travelled in to work by local workforce	Local working		% of workforce travelling between 5km and 40km to work (i.e. mostly within the District)	In-commuting	
			% of resident workers travelling less than 2km to work (i.e. within settlement)	% of resident workers travelling between 2km and 5km to work (i.e. very local)		% of residents travelling between 40km and 60km (to further afield and outside the District)	% of resident workers travelling more than 60km to work (i.e. long distance out-commuting)		% of workforce travelling less than 2km to work (i.e. within settlement)	% of workforce travelling between 2km and 5km to work (i.e. very local)		% of workforce travelling between 40km and 60km (further afield and outside the District)	% of workforce travelling more than 60km to work (i.e. long distance in-commuting)
Stroud District Totals / Average :		17km	14%	13%	44%	2%	3%		16%	15%	39%	1%	3%
Stroud (central)	MSOA 006	13.3km	22%	14%	37%	2%	3%	10km	26%	20%	34%	1%	2%
Stroud (Cainscross); Whiteshill & Ruscombe <i>(plus the lower tier settlement of Randwick)</i>	MSOA 004	13.4km	18%	23%	35%	2%	3%	9.5km	18%	15%	27%	1%	1%
Stroud (Rodbrorough); Brimscombe (see also MSOAs 008 and 010)	MSOA 007	16.9km	17%	17%	35%	2%	4%	10.8km	14%	28%	29%	1%	2%
Stonehouse	MSOA 005	12.5km	25%	15%	39%	2%	2%	13.7km	15%	14%	58%	2%	3%
Cam	MSOA 011	17.1km	16%	9%	53%	2%	3%	9.8km	26%	11%	26%	1%	1%
Dursley	MSOA 014	17.2km	17%	8%	53%	2%	3%	9.9km	27%	14%	34%	1%	1%
Berkeley; Newtown & Sharpness <i>(plus the lower tier settlements of Newport, Stone and Stinchcombe)</i>	MSOA 012	20.7km	9%	9%	53%	1%	3%	21.3km	10%	13%	45%	3%	4%
Wotton Under Edge; Kingswood; North Nibley <i>(plus the lower tier settlement of Hillesley)</i>	MSOA 015	20km	13%	8%	50%	2%	4%	14.3km	16%	10%	43%	2%	2%

Settlements in the Hierarchy (CP3)	Census Middle Super Output Area #	Average distance travelled out to work by local residents	Local working		% of resident workers travelling between 5km and 40km to work (i.e. mostly within the District)	Out-commuting		Average distance travelled in to work by local workforce	Local working		% of workforce travelling between 5km and 40km to work (i.e. mostly within the District)	In-commuting	
			% of resident workers travelling less than 2km to work (i.e. within settlement)	% of resident workers travelling between 2km and 5km to work (i.e. very local)		% of residents travelling between 40km and 60km (to further afield and outside the District)	% of resident workers travelling more than 60km to work (i.e. long distance out-commuting)		% of workforce travelling less than 2km to work (i.e. within settlement)	% of workforce travelling between 2km and 5km to work (i.e. very local)		% of workforce travelling between 40km and 60km (further afield and outside the District)	% of workforce travelling more than 60km to work (i.e. long distance in-commuting)
Stroud District Totals / Average :		17km	14%	13%	44%	2%	3%		16%	15%	39%	1%	3%
Nailsworth; Horsley;	MSOA 013	18.2km	16%	10%	44%	1%	4%	12.2km	20%	10%	37%	0.4%	2%
Minchinhampton; part of Brimscombe (see also MSOAs 008 and 007; North Woodchester; Amberley <i>(plus the lower tier settlements of Box and South Woodchester)</i>	MSOA 010	23.5km	8%	16%	36%	2%	6%	11km	9%	22%	39%	0.4%	1%
Frampton on Severn; Eastington; Slimbridge; Whitminster <i>(plus the lower tier settlements of Arlingham, Saul and Cambridge)</i>	MSOA 003	19.2km	7%	9%	51%	3%	3%	20.2km	7%	11%	49%	3%	5%
Bisley; Painswick; Oakridge Lynch; a small part of Manor Village (see also MSOA 008) <i>(plus the lower tier settlements of Cranham, Eastcombe and Sheepscombe)</i>	MSOA 002	21.6km	5%	8%	43%	3%	5%	46.8km	6%	9%	29%	2%	18%

Settlements in the Hierarchy (CP3)	Census Middle Super Output Area #	Average distance travelled out to work by local residents	Local working		% of resident workers travelling between 5km and 40km to work (i.e. mostly within the District)	Out-commuting		Average distance travelled in to work by local workforce	Local working		% of workforce travelling between 5km and 40km to work (i.e. mostly within the District)	In-commuting	
			% of resident workers travelling less than 2km to work (i.e. within settlement)	% of resident workers travelling between 2km and 5km to work (i.e. very local)		% of residents travelling between 40km and 60km (to further afield and outside the District)	% of resident workers travelling more than 60km to work (i.e. long distance out-commuting)		% of workforce travelling less than 2km to work (i.e. within settlement)	% of workforce travelling between 2km and 5km to work (i.e. very local)		% of workforce travelling between 40km and 60km (further afield and outside the District)	% of workforce travelling more than 60km to work (i.e. long distance in-commuting)
Stroud District Totals / Average :		17km	14%	13%	44%	2%	3%		16%	15%	39%	1%	3%
Chalford; part of Brimscombe (see also MSOAs 007 and 010); Manor Village (see also MSOA 002) <i>(plus the lower tier settlements of France Lynch and Bussage)</i>	MSOA 008	18.5km	8%	14%	46%	2%	4%	11.8km	13%	8%	22%	0.4%	2%
Coaley; Uley; Kings Stanley; Leonard Stanley <i>(plus the lower tier settlements of Nympsfield, Middleyard and Selsley)</i>	MSOA 009	18km	8%	20%	43%	1%	4%	10.5km	11%	15%	25%	0.4%	1%
Hardwicke; Upton St Leonards; Hunts Grove (emerging) <i>(plus the lower tier settlements of Brookthorpe, Haresfield and Longney & Epney)</i>	MSOA 001	15.3km	9%	12%	52%	4%	3%	14.1km	11%	13%	38%	1%	3%

Census 2011. This dataset is available by 'Middle Super Output Area'. Unlike the smaller LSOAs (which form the basis of most of the data tables in this report up to this point), most of the District's Middle Super Output Areas (MSOAs) cover more than one settlement, and some incorporate large areas of rural land as well. It is not easy to 'isolate' and apportion data from a MSOA to one or two specific settlements. So the travel-to-work data used in this table is not broken down into individual settlements; instead, all the settlements located within each MSOA have been listed. So these tables give a more general picture of the District's commuting geography. (please refer to APPENDIX 3 for a full list of settlements in each MSOA)

- 3.4.14 Again, **Table 14** bears out the evidence that a high proportion of **Stroud, Stonehouse, Cam, Dursley and Nailsworth** residents work within (or very close to) their home town: figures for the local workforce in these places show that a high proportion have a very short local in-commute. However, given the fact that Stonehouse is such a big net importer of workers (see **Table 7** on page 24), it is unsurprising that a higher than average proportion of Stonehouse-based workers commute between 40-60km into the District.
- 3.4.15 The settlements which seem to draw the highest proportion of workers *in* from outside the District and from far afield are:
- Stonehouse
 - Wotton Under Edge / Kingswood
 - Berkeley / Newtown & Sharpness
 - Frampton on Severn, Eastington, Whitminster, Slimbridge
 - Bisley, Painswick and the surrounding rural area (this is a particularly strange anomaly and rather hard to explain: it is not obvious why such a large proportion of the area's workforce might travel more than 60km to work there).

It must be borne in mind though, that these are proportional (percentage) figures: few of these areas include big employment hubs, so in most cases the pool of workers being counted is relatively small. Although the percentages seem high, this may not equate to a large number of people.

Travel to work: conclusions and sensitivity to future change

- 3.4.16 It seems that the best performing settlements, in terms of their ability to service the employment needs of the local community are:
- Stroud
 - Stonehouse
 - Nailsworth
 - Dursley
 - Cam
 - Wotton Under Edge / Kingswood
 - Brimscombe (and Thrupp)

These settlements typically have a good proportion of workers who live locally and the type and range of jobs on offer matches the characteristics of the resident workforce quite well. However, few of these settlements fully meet the needs of their resident workforce. Stonehouse, Kingswood and Brimscombe are net importers of workers, but the other settlements all see a substantial out-flow of residents who work elsewhere.

- 3.4.17 At the other end of the scale, most of the District's smaller settlements offer little for their working residents, who have no choice but to commute out to work.
- 3.4.18 A particular settlement's scale and location is only half of the story though: there is a significant socio-economic part to the picture too. Places like **Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford** and **Oakridge Lynch** have a high proportion of affluent residents, high earning and high-income households, people with professional and managerial occupations, self-employed and home-based workers and a very high level of long-distance commuting. Most of these places also have particularly low levels of economic activity, mainly due to the high proportion of (predominantly affluent) retirees. The degree of mid- and long-distance travelling to work undertaken by residents of these settlements is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

4. Retail and community service centres

Which settlements have the broadest range of services and facilities within them? Which settlements have a 'strategic' role (serving surrounding communities and the wider District) and which have a more limited 'local' role? How easy is it to access key services and facilities in terms of travel times from each settlement?

4.1 Town centres and retail hierarchy

4.1.1 A county-wide 'hierarchy' of retail centres was first established through the Gloucestershire Structure Plan (1991). To support the preparation of the Local Plan, Stroud District Council has commissioned two studies, which re-examine the hierarchy and the evidence behind it: **The Stroud Town Centres and Retailing Study 2010** and the **Retail Study Update 2013**. These studies have helped to establish a revised hierarchy for Stroud District, which is set out in **Policy CP12** of the Local Plan Submission Draft. The hierarchy reflects the scale, nature and role of the centres and their importance within the retail offer of the District as a whole.

4.1.2 In addition, the **Rural Settlements Classification Topic Paper Update (2013)** includes an audit of the services and facilities available inside each of the District's defined settlements.

4.1.3 **Table 15** summarises the Plan's town centres and retail hierarchy. The table shows the scale and status of each retail area in each of the settlements – ranging from the "principal town centre" (Stroud) down to the presence of a village shop or convenience store. The table identifies those settlements that have a significant 'strategic' role in terms of retail, and those with a more limited 'local' role – serving just the surrounding community or neighbourhood.

4.1.4 The settlements with a strategic retail role are:

- Stroud
- Stonehouse
- Dursley
- Wotton Under Edge
- Nailsworth

These settlements draw consumers from a wide catchment and provide the most diverse and extensive retail offer. Stroud is the District's principal town centre.

4.1.5 The following settlements provide the greatest range of 'local' retail facilities:

- **Cam** – has the strongest local role, with several 'neighbourhood shopping' facilities in addition to the main centre (which includes a Tesco supermarket that serves a wider catchment).
- **Berkeley, Minchinhampton** and **Painswick** each has a 'district centre' (like Cam), with a range of shops to serve a fairly substantial catchment of surrounding villages and hamlets.
- **Kings Stanley** and **Whitminster** both have a small range of shops which cater mainly for local communities and passing trade. Cainscross has a 'local centre' too, which adds to the diversity and extent of Stroud's overall retail offer.

4.1.6 Of all the settlements included in this Study (i.e. settlements that have been defined as one of the top three tiers in the Local Plan's Settlement Hierarchy), **Leonard Stanley** is the only one with no retail role at all. It has no village shop, but it does benefit from easy access to the facilities available in nearby Kings Stanley.

Table 15: Level of retail and town centre provision in each settlement

Settlements in the Hierarchy (CP3)	"Strategic" facilities		"Local" facilities				Strategic service provision score ¹³	Local service provision score ¹⁴
	Principal Town Centre *	Other Town Centres *	District Centres*	Local Centres *	Neighbourhood Shopping *	Village shop / convenience store **		
Stroud	✓					✓	1	3
Stroud (Rodborough)						✓		
Stroud (Cainscross)				✓		✓		
Stonehouse		✓				✓	1	1
Cam			✓		✓	✓	0	5
Dursley		✓			✓	✓	1	2
Berkeley			✓			✓	0	4
Wotton Under Edge		✓				✓	1	1
Nailsworth		✓				✓	1	2
Minchinhampton			✓			✓	0	4
Frampton on Severn						✓	0	1
Amberley						✓	0	1
Bisley						✓	0	1
Brimscombe					✓	✓	0	2
Chalford						✓	0	1
Coaley						✓	0	1
Eastington						✓	0	1
Hardwicke						✓	0	1
Horsley						✓	0	1
Kingswood						✓	0	1
Kings Stanley				✓		✓	0	3
Leonard Stanley						✗	0	0
Manor Village					✓	✓	0	2
Newtown & Sharpness						✓	0	1
North Nibley						✓	0	1
North Woodchester						✓	0	1
Oakridge Lynch						✓	0	1
Painswick			✓			✓	0	4
Slimbridge						✓	0	1
Uley						✓	0	1
Upton St Leonards						✓	0	1
Whiteshill & Ruscombe						✓	0	1
Whitminster				✓		✓	0	3

¹³ Each 'strategic' town centre = a score of '1'. Total score is a sum of all 'strategic' scores.

¹⁴ 'District centre' = a score of '3'; 'Local centre' = '2'; 'neighbourhood shopping' and 'village store' each score '1'. Total 'local' score is a sum of all these.

* Source: Stroud Town Centres and Retailing Study (2010) and Update (2013); Local Plan CP12.

** Source: Stroud District Rural Settlements Classification Topic Paper Update (2013) (Appendix C)

4.2 Access to services and facilities

- 4.2.1 Which settlements are most 'sustainable' in terms of ease of access to services and facilities? Settlements that contain all the facilities that communities require on a regular basis have a stronger community role than settlements where people have to travel elsewhere to meet their needs.
- 4.2.2 The Council's **Rural Settlements Classification Topic Paper Update (2013)** includes an audit of the services and facilities available inside each of the District's defined settlements. The study identifies the presence of specific 'strategic' and 'local' facilities within each of the District's settlements, giving an indication of which of the settlements are strategic service providers, and which have a local role.
- 4.2.3 **Table 16** summarises the level of services and facilities available in each settlement and identifies those settlements with a 'strategic' role and those with a primarily 'local' role:
- 4.2.4 The settlements which offer some degree of strategic service-provision are:
- Stroud
 - Stonehouse
 - Dursley
 - Berkeley
 - Wotton Under Edge
 - Nailsworth
 - Minchinhampton
 - Frampton on Severn
 - Manor Village
 - Painswick
 - Upton St Leonards
- 4.2.5 However, the level and range of services on offer varies greatly. **Stroud** and **Dursley** stand out as the two settlements with the most extensive range of services and facilities on offer – both at a 'strategic' level and at 'local' level; these are the District's principal service towns.
- 4.2.6 **Wotton Under Edge, Stonehouse** and **Nailsworth** form the next 'tier' of strategic service providers, each offering a reasonable range of strategic facilities, as well as a full range of local services. These settlements have a strong community role in meeting the needs of other settlements. **Berkeley, Painswick, Minchinhampton, Frampton on Severn, Manor Village** and **Upton St Leonards** are all very limited in terms of their strategic roles, although they do offer an excellent level of local services (apart from Manor Village, which is quite average).
- 4.2.7 Amongst the District's largest settlements, **Cam** stands out as seeming under-resourced. It has no 'strategic' facilities apart from its main line rail station. However, it does benefit (or suffer, depending on your perspective) from its close proximity to Dursley, which is where the locality's strategic services and facilities are all concentrated.
- 4.2.8 All the settlements classified as either an "Accessible Local Service Centre" or a "Local Service Centre" in the Stroud District settlement hierarchy (Policy CP3) (i.e. the settlements in the top two tiers of the hierarchy) have a full range of 'local' services and facilities on offer. In addition, **Painswick** (a 'third tier' settlement) is notable for its range of local services and facilities, which is comparable with any of the "Local Service Centres". In fact it scores the same as Berkeley for both strategic and local service provision.

Table 16: Level of community services and facilities provided by each settlement

Settlements in the Hierarchy (CP3)	“Strategic” facilities *						“Local” facilities *					Strategic service provision score	Local service provision score
	Bank / building society	Hospital	Secondary school	Library (in a building)	Sports centre or swimming pool	Railway station	Post Office	Community Hall	Children’s play area or sports field	Primary school or nursery	Doctors surgery		
Stroud	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	6	5
Stroud (Rodborough)	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗		
Stroud (Cainscross)	✗	✗	✓	✗	✓	✗	✓	✓	✓	✓	✗		
Stonehouse	✓	✗	✓	✓	✗	✓	✓	✓	✓	✓	✓	4	5
Cam	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓	1	5
Dursley	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	5	5
Berkeley	✓	✗	✗	✓	✗	✗	✓	✓	✓	✓	✓	2	5
Wotton Under Edge	✓	✗	✓	✓	✓	✗	✓	✓	✓	✓	✓	4	5
Nailsworth	✓	✗	✗	✓	✓	✗	✓	✓	✓	✓	✓	3	5
Minchinhampton	✗	✗	✗	✓	✗	✗	✓	✓	✓	✓	✓	1	5
Frampton on Severn	✗	✗	✗	✓	✗	✗	✓	✓	✓	✓	✓	1	5
Amberley	✗	✗	✗	✗	✗	✗	✓	✓	✗	✓	✗	0	3
Bisley	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Brimcombe	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Chalford	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	0	3
Coaley	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	0	3
Eastington	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Hardwicke	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Horsley	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	0	3
Kingswood	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Kings Stanley	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Leonard Stanley	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	0	3
Manor Village	✗	✗	✓	✗	✗	✗	✗	✗	✓	✓	✓	1	3
Newtown & Sharpness	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
North Nibley	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
North Woodchester	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Oakridge Lynch	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Painswick	✗	✗	✗	✓	✓	✗	✓	✓	✓	✓	✓	2	5
Slimbridge	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4
Uley	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	0	4
Upton St Leonards	✗	✗	✗	✗	✓	✗	✓	✓	✓	✓	✗	1	4
Whiteshill & Ruscombe	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	0	3
Whitminster	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	0	4

* Source: Stroud District Rural Settlement Classification Topic Paper (Update 2013)

Score of 0	Average travel time is less than 15 minutes
Score of 1	Average travel time is between 16 and 30 minutes
Score of 2	Average travel time is over 30 minutes
Score of 3	Impossible/unrealistic to access using public transport

4.2.9 The MAIDeN (Gloucestershire County Council) **“Accessibility Matrix”** is based upon average drive-times and public transport journey times to key services across the county. Each ‘Census Output Area’ (COA) in Gloucestershire has been given a series of scores, between 0 and 3, to represent the average journey times from that place to the nearest market town, minor injury unit, doctor’s surgery, pharmacy, primary school, sixth form, further education college, supermarket and post office. (See accessibility score ‘key’, left).

4.2.10 **Table 17**, below, is derived from the 2012 Matrix. In order to calculate a ‘score’ for each settlement, an average has been calculated using the data for those Census Output Areas that lie within (or mostly within) each settlement boundary. The scores for Stroud, for example, are averaged from a total of 76 Census Output Areas. By contrast, that data for Horsley, North Nibley and Oakridge Lynch are each from a single COA (not an average of several).

Table 17: Accessibility to services and facilities (Derived from MAIDeN Accessibility Matrix 2012)

Settlements in the Hierarchy (CP3) *	Market town		Minor Injury unit		Doctor		Pharmacy		Primary school		6 th form		Further education college		Branded supermarket		Post Office		Overall accessibility score (sum of all the average scores for the different categories)	
	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive		
Stroud	0.2	0.0	0.6	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.4	0.1	0.3	0.1	0.0	0.0	0.0	0.0	2.4	BEST
Cam	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.0	0.0	0.0	0.0	0.0	4.1	V. GOOD
Dursley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.0	2.0	0.0	0.0	0.0	0.0	5.0	V.GOOD
Whiteshill & Ruscombe	1.0	0.8	1.8	1.0	0.8	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	V.GOOD
North Woodchester	0.0	1.0	1.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5	1.0	1.0	0.0	0.0	0.0	0.0	7.0	GOOD
Uley	1.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.7	2.0	2.0	0.0	0.0	0.0	0.0	7.0	GOOD
Stonehouse	0.2	0.0	2.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.0	1.0	1.3	0.0	0.0	0.0	0.0	8.1	GOOD
Wotton Under Edge	0.0	0.0	2.7	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	2.6	2.0	0.0	0.0	0.0	0.0	9.1	GOOD
Kingswood	0.0	0.0	3.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	3.0	2.0	0.0	0.0	0.0	0.0	9.3	GOOD
Painswick	1.0	1.0	1.0	1.0	0.2	0.0	0.0	0.0	0.0	0.0	1.0	1.0	0.2	1.0	1.0	1.0	0.0	0.0	9.4	GOOD
Amberley	0.5	0.0	2.0	1.0	1.0	0.5	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	0.5	0.0	0.0	0.0	9.5	GOOD

Settlements in the Hierarchy (CP3) *	Market town		Minor Injury unit		Doctor		Pharmacy		Primary school		6 th form		Further education college		Branded supermarket		Post Office		Overall accessibility score (sum of all the average scores for the different categories)	
	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive	Bus / walk	Drive		
Nailsworth	0.0	0.0	2.0	1.9	0.0	0.0	0.0	0.0	0.1	0.0	1.0	1.9	1.3	2.0	0.0	0.0	0.0	0.0	10.3	FAIR
Brimscombe	1.0	1.0	1.0	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	0.0	0.3	0.0	0.0	10.3	FAIR
Hardwicke	1.2	1.1	2.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.7	1.0	1.0	0.4	0.0	0.0	0.0	10.7	FAIR
Upton St Leonards	1.7	1.0	2.0	1.0	0.3	0.0	0.3	0.0	0.0	0.0	1.0	0.0	2.0	1.0	0.3	0.0	0.0	0.0	10.7	FAIR
Horsley	1.0	0.0	2.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	2.0	2.0	0.0	0.0	0.0	0.0	11.0	FAIR
North Nibley	0.0	0.0	2.0	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	2.0	2.0	1.0	0.0	0.0	0.0	11.0	FAIR
Manor Village	1.1	2.0	1.2	1.8	0.0	0.0	0.0	0.0	0.0	0.0	1.0	2.0	1.0	1.4	0.0	0.0	0.1	0.0	11.6	FAIR
Kings Stanley	1.0	0.5	2.5	2.0	1.0	0.0	1.0	0.3	0.0	0.0	0.8	1.0	1.0	1.0	0.0	0.0	0.0	0.0	12.0	FAIR
Whitminster	1.0	1.0	3.0	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	0.5	0.0	0.0	0.0	12.5	FAIR
Leonard Stanley	1.0	0.3	2.8	2.0	1.0	0.0	1.3	0.3	0.0	0.0	1.0	1.0	1.0	1.3	0.0	0.0	0.0	0.0	12.8	FAIR
Berkeley	1.7	1.0	3.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.0	2.0	2.0	0.0	0.0	0.0	0.0	13.0	POOR
Chalford	1.2	1.5	1.7	1.0	0.7	0.0	0.7	0.0	0.0	0.0	1.5	2.0	1.2	1.0	0.5	0.0	0.2	0.0	13.0	POOR
Slimbridge	1.0	0.0	2.5	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0	1.0	2.0	2.0	1.0	0.0	0.0	0.0	13.5	POOR
Eastington	1.0	1.0	3.0	2.0	1.0	0.0	1.0	1.0	0.3	0.0	1.0	1.0	1.0	2.0	0.0	0.0	0.0	0.0	15.3	POOR
Minchinhampton	1.0	1.0	3.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	1.6	2.0	1.0	1.7	2.0	0.9	0.0	0.0	15.4	POOR
Coaley	1.0	1.0	1.0	1.0	1.0	0.0	1.0	1.0	0.0	0.0	1.0	1.0	3.0	2.0	1.0	1.0	1.0	0.0	17.0	V. POOR
Bisley	1.0	1.0	3.0	1.0	2.0	0.5	2.0	0.5	0.0	0.0	1.0	2.0	1.0	1.0	2.0	0.5	0.0	0.0	18.5	V. POOR
Newtown & Sharpness	1.7	1.0	3.0	2.0	2.0	0.0	2.0	0.0	0.0	0.0	1.0	2.0	2.0	2.0	0.0	0.0	0.0	0.0	18.7	V. POOR
Frampton on Severn	2.0	1.0	3.0	2.0	0.0	0.0	2.0	1.0	0.0	0.0	2.0	1.0	2.0	2.0	2.0	0.0	0.0	0.0	20.0	V. POOR
Oakridge Lynch	2.0	1.0	3.0	1.0	2.0	1.0	2.0	1.0	0.0	0.0	2.0	2.0	2.0	1.0	2.0	1.0	0.0	0.0	23.0	WORST

* Scores for each settlement have been calculated by aggregating the MAIDeN accessibility scores for several 'Census Output Areas'. Please see APPENDIX 4 for more on the methodology and a list of the COAs that have been attributed to each settlement.

- 4.2.11 All the District's four major towns perform well or very well in terms of the ability to access key services and facilities:

Stroud:

As the District's principal settlement, it is no surprise that Stroud town (including the satellite communities of Rodborough and Cainscross) performs best in terms of the ability to access key services and facilities. Many of these facilities are based within Stroud itself, and travel times from most of the census output areas (COAs) within the settlement are less than 15 minutes (both on foot/by bus and by car). If any of these services and facilities can really be considered 'less accessible', it would appear to be the hospital (minor injuries unit). An average score of 0.6 for travel by bus/on foot suggests that some COAs within Stroud will experience travel times greater than 15 minutes.

Cam:

Cam has "very good" accessibility to most key services and facilities. As in Stroud, the slightly higher average score of 0.9 for travel by bus/on foot to a minor injuries unit (in Dursley) suggests that some COAs in Cam will experience travel times greater than 15 minutes. Average travel time to a further education college is recorded as even higher (up to and over 30 minutes). Although Stroud has the nearest dedicated FE college, Rednock School in Dursley is in fact a further education provider.

Dursley:

Dursley also has "very good" accessibility to most key services and facilities. Many of these services are actually based within the town, so this is unsurprising. The one facility that stands out as least accessible is a further education college. Although Stroud has the nearest dedicated FE college, Rednock School in Dursley is in fact a further education provider.

Stonehouse:

Of the four main settlements, Stonehouse performs least well, although overall average travel times from its COAs are still "good". The ability to access a minor injuries unit is most problematic, with average travel times by car and by bus/on foot exceeding 30 minutes. Access to further education is more difficult –the nearest 6th form providers and/or further education college are based in Stroud, with average travel times between 16 and 30 minutes.

- 4.2.12 Across the District, it seems that a minor injuries unit, a 6th form or a further education college are consistently the most difficult services and facilities to access. It is notable that **Wotton Under Edge, Berkeley and Minchinhampton**, which are amongst the District's bigger settlements, have such poor access to a minor injury unit (this is practically "impossible" by bus) and that access to several other key services is also poor. It is also "impossible" to travel by bus from many of Wotton's COAs to a further education college.
- 4.2.13 Whilst it is perhaps unsurprising that accessibility is poor from many of the District's smaller settlements, particularly the more remote ones, the settlements at the 'bottom' of the list actually include some fairly substantial towns and villages:

- Oakridge Lynch
- Frampton on Severn
- Newtown & Sharpness
- Bisley
- Coaley
- Minchinhampton
- Eastington
- Slimbridge
- Chalford
- Berkeley

Access to services and facilities: conclusions and sensitivity to future change

- 4.2.14 Throughout this study, we have seen that most of the District's settlements are likely to be affected by some degree of population change over the next 15 to 20 years. Although the District's overall population is projected to grow significantly, this growth is unlikely to be spread 'evenly' across all settlements, due to a variety of factors already discussed.
- 4.2.15 Settlements faced with either a shrinking population or a reduction in economic activity may experience some pressure on the viability of any services and facilities they provide. Such places could benefit from some degree of growth, to help sustain their existing services – or even better, to 'boost' and improve them. But the level of population growth required to, for example, improve the frequency of a bus service or establish a new route is far in excess of what most small settlements could sustain – or would want. Meanwhile, the sustainability of a village school will be more reliant on the local demographic mix, rather than the size of the settlement's total population. And in many of the District's smaller settlements, the population is most likely to age significantly over the coming years, with an increasing proportion of over-65s and a decrease in the proportion of working age people and children.
- 4.2.16 Conversely, some communities will see significant population growth, placing ever increasing pressure on existing capacity, services and facilities. For reasons already discussed, significant population growth can only occur through the provision of more housing. Whilst some 'windfall' housing development should be welcomed, it is crucial that the bulk of future housing growth is *planned*. Careful planning should aim to:
- avoid sporadic development that offers little to sustain or boost existing communities
 - allow growth to be targeted to the most sustainable locations and ensure that there is the best chance to obtain coordinated improvements to community infrastructure, services and facilities as a direct result of the development

5. Conclusions: a summary of the identified roles and functions for each settlement

Table 18 provides an at-a-glance comparison of all the settlements covered by this study. It picks out key pieces of data, which help to highlight their key characteristics and act as indicators of each settlement's role(s) and function(s).

This section of the study also includes a written summary of key information relating to each settlement's role and function:

Stroud	page 65	Horsley	page 78
Stonehouse	page 66	Kingswood	page 79
Cam	page 68	Kings Stanley	page 80
Dursley	page 69	Leonard Stanley	page 80
Berkeley	page 70	Manor Village	page 81
Frampton on Severn	page 71	Newtown & Sharpness	page 81
Minchinhampton	page 71	North Nibley	page 82
Nailsworth	page 72	North Woodchester	page 82
Wotton Under Edge	page 73	Oakridge Lynch	page 83
Amberley	page 73	Painswick	page 84
Bisley	page 74	Slimbridge	page 85
Brimscombe	page 75	Uley	page 86
Chalford	page 76	Upton St Leonards	page 86
Coaley	page 77	Whiteshill & Ruscombe	page 87
Eastington	page 77	Whitminster	page 88
Hardwicke	page 78		

Table 18: a comparison of settlements' roles and functions

Settlements in the Hierarchy (CP3)	Settlement size		Growth Projected population growth 2011-2031	% Increase in the number of dwellings 2006-2014 (Plan period so far)	Economic activity		Employment (2011 census)				Local employment opportunities		
	Population 2011 (Census)	Number of dwellings 2014			Economically active population 2011 (Census) *	As a % of the total local pop. aged 16-74	Local workers: * No. of local residents in employment ²	Local jobs: * No. of people whose work is based at each settlement ³	* Is the settlement a net importer or exporter of workers? ⁴	"employment density" ⁴ (available local jobs / available resident workers)	Town centre within settlement (CP12)	Major employment site (E1, E2) within 2km	Other locally significant employment
Stroud District Totals / Average :	112,779	51,222	12%	7%	59,980	73%	57,342	50,092	-9,888 ⁴	0.84	-	-	
First tier settlements:													
Stroud	25,118	11,615	10%	8%	13,900	75%	13,100	11,720	-2,180	0.84	✓	✓	
Stonehouse	7,725	3,390	10%	5%	4,150	74%	3,930	7,280	+3,130	1.75	✓	✓	
Cam	8,162	3,751	14%	5%	4,180	71%	4,010	1,980	-2,200	0.47	✓	✓	
Dursley	6,697	3,063	10%	13%	3,510	73%	3,300	2,420	-1,090	0.69	✓	✓	
Second tier settlements:													
Berkeley	2,027	933	12%	3%	1,120	75%	1,080	810	-310	0.72	✓	✓	Visitor attractions such as Berkeley castle, Cattle Country
Frampton on Severn	1,430	582	11%	2%	800	78%	760	830	+30	1.04	✗	✓	
Hunts Grove (anticipated)	-	280		14,000%	-	-	-	-	-	-	Local centre	✓	Quedgeley/Waterwells and Gloucester city, just outside District
Minchinhampton	3,462	1,345 ¹	18%	3% ¹	1,530	65%	1,470	1,370	-180	0.88	✓	✓	Aston Down and various employers along Cirencester Road
Nailsworth	5,803	2,674	11%	9%	3,060	72%	2,920	2,380	-680	0.78	✓	✓	
Wotton Under Edge	4,889	2,216	12%	2%	2,590	74%	2,470	1,370	-1,220	0.53	✓	✓	Renishaw is a major local employer; Wickwar brewery in S.Glos
Third tier settlements:													
Amberley	529	240	16%	4%	260	70%	250	360 ⁵	+100 ⁵	1.38 ⁵	✗	✓	
Bisley	750	370	17%	4%	380	69%	370	310	-50	0.81	✗	✗	
Brimscombe	2,370	1,046	12%	3%	1,270	73%	1,220	1,340	+70	1.06	✗	✓	
Chalford	2,923	1,204	12%	1%	1,500	73%	1,450	840	-660	0.56	✗	✓	
Coaley	635	259	14%	6%	330	70%	320	160	-170	0.48	✗	✗	
Eastington	1,579	685	12%	8%	860	74%	840	910	+50	1.06	✗	✓	
Hardwicke	3,936	1,769	7%	3%	2,400	81%	2,300	1,230	-1,170	0.51	✗	✓	Quedgeley/Waterwells and Gloucester city, just outside District
Horsley	406	178	11%	3%	210	70%	200	130	-80	0.62	✗	✗	Ruskin Mill
Kingswood	1,389	571	10%	15%	730	74%	710	1,190	+460	1.63	✗	✓	Renishaw is a major local employment; Wickwar brewery in S.Glos
Kings Stanley	1,539	724	14%	5%	810	71%	780	340	-440	0.41	Local centre	✓	
Leonard Stanley	1,442	647 ¹	15%	1% ¹	750	70%	710	310	-470	0.42	✗	✓	
Manor Village	2,830	1,256	9%	0%	1,590	78%	1,530	580	-1,010	0.36	✗	✓	Thomas Keeble School
Newtown & Sharpness	1,412	699	11%	14%	780	78%	750	510	-270	0.65	✗	✓	
North Nibley	567	236	15%	3%	280	71%	270	210	-70	0.75	✗	✗	
North Woodchester	635	292	16%	3%	310	68%	300	430 ⁵	+120 ⁵	1.39 ⁵	✗	✓	
Oakridge Lynch	536	259	17%	1%	270	69%	260	220	-70	0.82	✗	✗	
Painswick	2,413	1,252	20%	5%	1,040	63%	1,010	850	-190	0.82	✓	✗	
Slimbridge	795	332	13%	5%	410	68%	400	410	0	1.00	✗	✓	Slimbridge wildfowl & wetlands centre
Uley	1,131	489	14%	3%	590	71%	570	330	-260	0.56	✗	✗	
Upton St Leonards	1,138	482	12%	1%	610	73%	590	600	-10	0.98	✗	✗	Brockworth business park and Gloucester city, just outside District
Whiteshill & Ruscombe	1,153	498	12%	2%	630	74%	610	240	-390	0.38	✗	✓	
Whitminster	890	386	11%	5%	490	76%	480	690	+200	1.41	Local centre	✗	

Settlements in the Hierarchy (CP3)	Residents' travel to work patterns (2011 census)						Retail and community services and facilities					
	% whose workplace is within Stroud District ⁶	% who work mainly at or from home	Local working		Out-commuting		Most common workplace destinations (outside Stroud District) ⁶	Provides a "strategic" level of retail service	Level/amount of "local" retail services on offer (in addition to any "strategic" provision)	Level/amount of "strategic" community services and facilities	Level/amount of "local" community services and facilities	Accessibility to key services and facilities within settlement and elsewhere
			% travelling less than 2km (i.e. within settlement)	% travelling between 2-5km (i.e. very local)	% travelling between 40-60km (surrounding towns & cities)	% travelling more than 60km (i.e. long-distance)						
Stroud District Totals / Average :	54%	14%	14%	13%	2%	3%	Gloucester (12%); Bristol/Bath/S.Glos (11%)	-	-	-	-	-
First tier settlements:												
Stroud	65%	11%	21%	18%	2%	3%	Gloucester, Cotswold, Bristol/Bath/S.Glos	✓	GOOD	BEST	V.GOOD	BEST
Stonehouse	66%	8%	25%	15%	2%	2%	Gloucester, Tewkesbury Borough, Bristol/Bath/S.Glos	✓	BASIC	GOOD	V.GOOD	GOOD
Cam	59%	10%	16%	9%	2%	3%	Bristol/Bath/S.Glos, Gloucester	✗	BEST	BASIC	V.GOOD	V. GOOD
Dursley	57%	10%	17%	8%	2%	3%	Bristol/Bath/S.Glos, Gloucester	✓	BASIC	V.GOOD	V.GOOD	V. GOOD
Second tier settlements:												
Berkeley	46%	12%	12%	10%	1%	3%	Bristol/Bath/S.Glos, Gloucester	✗	V.GOOD	BASIC	V.GOOD	POOR
Frampton on Severn	51%	17%	7%	8%	3%	3%	Gloucester, Bristol / Bath/ S.Glos, Cheltenham	✗	BASIC	BASIC	V.GOOD	V. POOR
Hunts Grove (anticipated)	(23%)	-	-	-	-	-	Gloucester, Tewkesbury Borough	✗	-	-	-	-
Minchinhampton	52%	21%	9%	15%	2%	6%	Cotswold, Gloucester	✗	V.GOOD	BASIC	V.GOOD	POOR
Nailsworth	59%	15%	17%	10%	1%	4%	Cotswold, Bristol/Bath/S.Glos, Gloucester	✓	BASIC	GOOD	V.GOOD	FAIR
Wotton Under Edge	43%	12%	18%	7%	2%	3%	Bristol/Bath/S.Glos	✓	BASIC	GOOD	V.GOOD	GOOD
Third tier settlements:												
Amberley	52%	25%	8%	19%	2%	6%	Cotswold, Gloucester	✗	BASIC	✗	GOOD	GOOD
Bisley	42%	28%	6%	10%	3%	5%	Gloucester, Cheltenham, Cotswold, London & S.East	✗	BASIC	✗	GOOD	V. POOR
Brimacombe	60%	18%	9%	18%	3%	4%	Gloucester, Cotswold	✗	BASIC	✗	FAIR	FAIR
Chalford	51%	19%	7%	10%	2%	5%	Cotswold, Gloucester, Cheltenham	✗	BASIC	✗	FAIR	POOR
Coaley	60%	21%	2%	14%	1%	4%	Gloucester, Bristol/Bath/S.Glos	✗	BASIC	✗	GOOD	V. POOR
Eastington	51%	18%	9%	11%	2%	3%	Gloucester, Bristol / Bath/ S.Glos, Cheltenham	✗	BASIC	✗	GOOD	POOR
Hardwicke	23%	11%	11%	8%	3%	3%	Gloucester, Tewkesbury Borough	✗	BASIC	✗	FAIR	FAIR
Horsley	59%	21%	13%	8%	1%	4%	Cotswold, Bristol/Bath/S.Glos, Gloucester	✗	BASIC	✗	FAIR	FAIR
Kingswood	43%	19%	8%	8%	1%	5%	Bristol/Bath/S.Glos	✗	BASIC	✗	GOOD	GOOD
Kings Stanley	60%	13%	10%	25%	2%	5%	Gloucester, Bristol/Bath/S.Glos	✗	GOOD	✗	GOOD	FAIR
Leonard Stanley	60%	12%	11%	25%	1%	3%	Gloucester, Bristol/Bath/S.Glos	✗	✗	✗	FAIR	FAIR
Manor Village	51%	12%	8%	17%	2%	3%	Cotswold, Gloucester, Cheltenham	✗	BASIC	BASIC	FAIR	FAIR
Newtown & Sharpness	46%	12%	10%	12%	1%	3%	Bristol/Bath/S.Glos, Gloucester	✗	BASIC	✗	GOOD	V. POOR
North Nibley	43%	21%	6%	13%	2%	3%	Bristol/Bath/S.Glos	✗	BASIC	✗	GOOD	FAIR
North Woodchester	52%	25%	8%	19%	2%	6%	Cotswold, Gloucester	✗	BASIC	✗	GOOD	GOOD
Oakridge Lynch	42%	28%	6%	10%	3%	5%	Gloucester, Cheltenham, Cotswold, London & S.East	✗	BASIC	✗	GOOD	WORST
Painswick	42%	26%	5%	7%	4%	7%	Gloucester, Cheltenham, Cotswold, London & S.East	✗	V.GOOD	BASIC	V.GOOD	GOOD
Slimbridge	51%	19%	5%	8%	2%	4%	Gloucester, Bristol / Bath/ S.Glos, Cheltenham	✗	BASIC	✗	GOOD	POOR
Uley	60%	19%	3%	11%	1%	4%	Gloucester, Bristol/Bath/S.Glos	✗	BASIC	✗	GOOD	GOOD
Upton St Leonards	23%	14%	7%	19%	6%	3%	Gloucester, Tewkesbury Borough	✗	BASIC	BASIC	GOOD	FAIR
Whiteshill & Ruscombe	65%	17%	8%	23%	2%	4%	Gloucester, Cotswold, Bristol/Bath/S.Glos	✗	BASIC	✗	FAIR	V. GOOD
Whitminster	51%	17%	6%	11%	2%	3%	Gloucester, Bristol / Bath/ S.Glos, Cheltenham	✗	GOOD	✗	GOOD	FAIR

Notes on Table 18: a comparison of settlements' roles and functions

* Figures are rounded.

Settlement size and growth:

- 1 The 2014 HLA (Housing Land Availability Study) recorded annual house-building completions at 1st April 2014. For Minchinhampton and Leonard Stanley, this 'snap shot' is a distorted picture, as it records significant demolitions (-37 and -23 respectively), apparently connected to the Council's housing re-build programme in these two villages. At this time, there were no re-built homes completed, so the figures appear as a net loss in the HLA. This translates as falsely low growth rates for both places during the period 2006-2014.

Employment (2011 census):

- 2 Census 2011: "Local workers": this is a count of all residents (aged 16-74) who were in employment at the time of the census
- 3 Census 2011: "Local Jobs" : this is a count of all people (aged 16-74) who work in each place
- 4 The relationship between "Local jobs" and "Local workers": These calculations use the number of *economically active residents* as a count of "local workers" (i.e. the number of residents who are normally available to work, regardless of their current employment status), rather than the number of residents actually in employment. The net import/export is a calculation based on deducting the number of people aged 16-74 who work in each place (3) from the number of economically active people (16-74) who live in each place. "Employment density" is calculated by dividing the number of "local jobs" (3) by the number of economically active residents. A figure of "1.5" means there is one and a half local jobs for every 1 resident available to work; a figure of 0.5 means that there is half a job available for every 1 resident available to work.
- 5 The total figures for census LSOA 010A have been apportioned between Amberley, North Woodchester and the surrounding rural area, according to a formula (see APPENDIX 2). In reality, though, the majority of jobs based in this geographic LSOA are likely to sit closer to Woodchester and the industrial valley bottom, rather than the settlement of Amberley. So the true employment figures and "employment density" for North Woodchester is probably higher, whilst the figures for Amberley are lower.

Residents' travel to work patterns (2011 census):

- 6 These percentages are calculated using data from Census "Middle Super Output Areas" (MSOAs), which are larger geographical areas that often include more than one settlement as well as surrounding rural land. The workplace 'destinations' apply to all journeys originating within the MSOA as a whole, rather than from a specific settlement.

Stroud

- The “Stroud” settlement boundary encompasses parts of the parishes of Rodborough and Cainscross, as well as the Stroud parish, which includes the town centre and surrounding residential areas and suburbs.
- With a resident population of 25,000+, Stroud is by far the largest settlement in the District.
- Based on current trends, the major towns of Stroud, Stonehouse and Dursley, which each have a healthy proportion of working-age adults and a greater-than-average proportion of children and young people, are projected to see slower-than-average population growth.
- Although Stroud has by far the largest economically active population (nearly 14,000), it has only slightly above-average levels of economic activity. It has a below-average proportion of self-employed people and a slightly above-average unemployment rate (only Stroud and Dursley had more than 3% unemployment in 2011). The proportion of retired people in Stroud is amongst the lowest in the District.

Employment role:

- Stroud is the District’s largest employment ‘hub’: more than 11,700 jobs are based in the town. And combined with adjacent Brimscombe & Thrupp, this area clearly represents the District’s most important employment base. A quarter of the District’s business units are based within this area, and 27% of the District’s jobs.
- But whilst Stroud provides thousands more jobs than any other settlement in the District, it does actually ‘export’ workers: there are more economically active and working people living in Stroud than there are jobs.
- Stroud has a good proportion of workers who live locally (a very high proportion of Stroud residents work within 2km/1.2 miles of home; and a large proportion of the town’s workforce commute in from a very local catchment of 2-5km) and the type and range of jobs on offer matches the characteristics of the resident workforce quite well.
- Stroud and Stonehouse have a close functional relationship, with a significant flow of residents/workers travelling between the two.
- Stroud is fairly close to the District average in terms of the proportion of people working in each employment sector. The biggest employment sector (29%) is public administration, education and health, which is representative of the District as a whole. The proportion of residents working in financial, real estate, professional and administrative activities is slightly below average, and roughly equal to the number employed in manufacturing. Like the three other major towns, Stroud has a below-average representation of professional occupations, managers, directors or senior officials amongst its resident working population.
- There is a significant concentration of public sector, education and healthcare jobs here (industries that are forecast to see a reducing workforce between now and 2031).
- Around 800 “professional, scientific and technical” jobs are based in and around the Stroud town, and around 2,400 jobs in retail, wholesale and motor trades: all sectors that are forecast to grow. Growth is also forecast in arts, entertainment and other leisure services. This is a relatively minor employment sector in all the District’s settlements, representing less than 10% of the jobs based in each place. However, in numbers terms, Stroud has a high concentration of arts, entertainment and recreation jobs (nearly 600) and may be well placed to see job growth.
- Stroud, Stonehouse and Cam are the only settlements in the District with active rail stations. None of these settlements show unusually high levels of long-distance commuting by residents (e.g. to London), although the presence of a rail station may ease mid-distance commuting to

Gloucester and Swindon (there is no direct link to Bristol, another of the District's major employment destinations). Of course, the station does not solely serve the population of the Stroud settlement: many people from other settlements will drive, cycle or take a bus (if there is one available) to the station and travel on from there.

Retail role:

- Stroud is one of just five settlements with a strategic retail role, drawing consumers from a wide catchment and providing the most diverse and extensive retail offer. Stroud is the District's principal town centre: its most important retail hub.
- Stroud also has a good level of local retail services to support its satellite communities and suburbs.

Community services and facilities:

- Stroud and Dursley stand out as the two settlements with the most extensive range of services and facilities on offer – both at a 'strategic' level and at 'local' level; these are the District's principal service towns.
- With a further education college and a hospital (including minor injuries unit), Stroud provides some crucial strategic services that are unavailable elsewhere. But accessibility is very poor from some of the District's settlements.

Stonehouse

- With a resident population of more than 7,700, Stonehouse is one of the District's four biggest towns.
- Based on current trends, the major towns of Stroud, Stonehouse and Dursley, which each have a healthy proportion of working-age adults and a greater-than-average proportion of children and young people, are projected to see slower-than-average population growth.
- Stonehouse is only slightly above average in terms of its economic activity rate. The number of economically active people living in Stonehouse is very similar to that of Cam, but the activity rate is higher. Like Stroud, the proportion of retired people is well below average. The proportion of self-employed people is very low; but the proportion of people in full time employment is well above average.

Employment role:

- Stonehouse is the District's second largest employment hub: more than 7,000 people work here.
- The way that Stonehouse functions is unlike almost all the other settlements (both big and small): Stonehouse draws thousands of workers in from elsewhere: there are over 3,000 more jobs in the settlement than there are working residents. Of the District's larger settlements, Stonehouse is in a league of its own, with a score of 1.75 jobs available for every 1 economically active resident.
- Stonehouse relies heavily on manufacturing, both in terms of the jobs it has on offer and as a key employment sector for its residents. A greater-than-average proportion of Stonehouse residents work in manufacturing: at 17% this is 4% above the District average, and the highest figure of all settlements in this study. Stonehouse also stands out as having the District's highest proportion of process, plant and machine operatives amongst its working residents (11%).
- This is combined with very low proportions of professionals, managers, directors and senior officials. The proportion of people employed in caring, leisure and other service occupations is

above average. All the other employment sectors and occupations are fairly average, or just 1-2% above/below the District average.

- Professional, scientific and technical jobs are predicted to increase during the period up to 2031. Whilst this sector currently accounts for fewer than 10% of the jobs based in Stonehouse, the 60 professional, scientific and technical businesses based here represent a significant presence – if they were to grow and remain local, this could be of benefit to Stonehouse’s jobs market.
- Stonehouse may also benefit from growth in construction and retail, wholesale and motor trades.
- Stroud and Stonehouse have a close functional relationship, with a significant flow of residents/workers travelling between the two.
- Stonehouse has a good proportion of workers who live locally (a very high proportion of Stonehouse residents work within 2km/1.2 miles of home; and a large proportion of the town’s workforce commute in from a very local catchment of 2-5km).
- However, given the fact that Stonehouse is such a big net importer of workers, it is unsurprising that a higher than average proportion of Stonehouse-based workers commute between 40-60km into the District.
- Stroud, Stonehouse and Cam are the only settlements in the District with active rail stations. None of these settlements show unusually high levels of long-distance commuting by residents (e.g. to London/Birmingham), although the presence of a rail station may ease mid-distance commuting to Gloucester and Swindon (there is no direct link from Stonehouse to Bristol, another of the District’s major employment destinations). Of course, the station does not solely serve the population of the Stonehouse settlement: many people from other settlements will drive, cycle or take a bus (if there is one available) to the station and travel on from there.

Retail role:

- Stonehouse is one of just five settlements with a strategic retail role, drawing consumers from a wide catchment and providing the most diverse and extensive retail offer.
- Stonehouse also has a reasonable level of local retail services to support its satellite communities and suburbs.

Community services and facilities:

- After Stroud and Dursley, Stonehouse form part of a second ‘tier’ of strategic service providers (together with Nailsworth and Wotton Under Edge). These settlements each offer a reasonable range of strategic facilities, as well as a full range of local services. These settlements have a strong community role in meeting the needs of other settlements.
- In terms of accessibility to services and facilities (within the town and elsewhere), Stonehouse doesn’t perform as well as Stroud, Dursley or Cam: the ability to access a minor injuries unit is most problematic, with average travel times by car and by bus/on foot exceeding 30 minutes. Access to both a 6th form and a further education college are also more difficult – the nearest are based in Stroud, with average travel times of between 16 and 30 minutes.

Cam

- Cam is the second largest individual settlement in the District. But with a population of 8,000+ it is not in the same league as Stroud. However, Cam and Dursley are adjacent settlements and their combined population (14,800+) makes this a really significant conurbation and an important second focus for the District.
- Of the District's four main settlements, Cam is the only one with below-average levels of economic activity. Yet this is still the second largest economically active population in the District (similar in size to Stonehouse). This low rate seems to be due to Cam's relatively high proportion of retirees. Like the other main settlements, Cam has a very low proportion of self-employed residents.

Employment role:

- Cam is one of the District's major employment 'hubs'. But there is less than half a job available for every economically active resident: despite the fact that there are nearly 2,000 jobs available within the settlement, it also acts as a major 'dormitory' town for the District's working population (more than 4,000 people). *Most* people have no choice but to commute to work elsewhere.
- Despite the need for many residents to out-commute to find work, Cam is actually amongst the better performing settlements in terms of its ability to service the employment needs of its community: a good proportion of workers live locally and the type and range of jobs on offer matches the characteristics of the resident workforce quite well.
- Cam has an above-average proportion of residents employed in manufacturing (16%). Slightly fewer residents than average are employed in public administration, education or health, but this remains the largest sector, as elsewhere in the District. Amongst the District's largest settlements, Cam has the greatest proportion of workers in agriculture/utilities (6%).
- Cam shows strength in the fact that almost half its businesses are based in sectors that are forecast to see job growth: construction; retail, wholesale and motor trades; and professional, scientific and technical. If these businesses were to grow and yet be able to stay locally-based, Cam could benefit from increased job numbers.
- A good proportion of Cam's workers live locally (a very high proportion of Cam residents work within 2km/1.2 miles of home). Meanwhile, a lower than average proportion of residents travel between 2km-5km to work – which means that very few people are out-commuting to neighbouring smaller settlements.
- Stroud, Stonehouse and Cam are the only settlements in the District with active rail stations. None of these settlements show unusually high levels of long-distance commuting by residents (e.g. to London/Birmingham), although the presence of a rail station at Cam may ease mid-distance commuting to Gloucester and Bristol/South Gloucestershire (both of which are key workplace destinations for Cam residents). Of course, the station does not solely serve the population of the Cam settlement: many people from other settlements will drive, cycle or take a bus (if there is one available) to the station and travel on from there.

Retail role:

- Despite its size, Cam does not have a strategic retail role. However, it benefits from close proximity to Dursley (one of the District's two main retail centres) which draws consumers from a wide catchment and provides a diverse and extensive retail offer.
- Cam has a very strong 'local' retail role, with several 'neighbourhood shopping' facilities in addition to the main centre (which includes a Tesco supermarket that serves a wider catchment).

Community services and facilities:

- Amongst the District's largest settlements, Cam stands out as seeming under-resourced. It has no 'strategic' facilities apart from its main line rail station. However, it does benefit (or suffer, depending on your perspective) from its close proximity to Dursley, which is where the locality's strategic services and facilities are all concentrated.

Cam has "very good" accessibility to most key services and facilities (within the town and elsewhere). The ability to access a minor injuries unit (in Dursley) is slightly worse for some parts of Cam.

Dursley

- Dursley is the third largest individual settlement in the District, with a population of nearly 6,700. However, Cam and Dursley are adjacent settlements and their combined population (14,800+) makes this a really significant conurbation and an important second focus for the District.
- Based on current trends, the major towns of Stroud, Stonehouse and Dursley, which each have a healthy proportion of working-age adults and a greater-than-average proportion of children and young people, are projected to see slower-than-average population growth.
- The economic activity rate in Dursley matches the District average (73%). Dursley has the fourth largest economically active population in the District. Dursley has low levels of self-employment. Amongst the economically inactive, there is a below-average proportion of retirees; but a relatively large proportion of economic inactivity is due to looking after home or family (second only to Nailsworth).

Employment role:

- Dursley is another significant provider of jobs for the District (2,400+). Yet here, too, there is a significant mis-match between the number of jobs available and the number of residents available to work. With an "employment density" score of 0.69, there is less than ¾ of a job per 1 economically active resident. So, like Cam, Dursley acts as a major 'dormitory', as well as being a big provider.
- Along with Berkeley, Dursley has the lowest proportion of residents working in financial, real estate, professional and administrative activities (just 13%); it also has amongst the lowest proportion of managers, directors and senior officials living in the town. Dursley appears to be slightly less reliant on manufacturing as a source of local jobs than the other three main settlements; nevertheless an above-average proportion of residents are employed in the sector (16%). In most other respects, Dursley's working population is very representative of the District average
- Like Stroud, Dursley shows some vulnerability because of the concentration of public administration and education jobs here (industries that are forecast to have a shrinking workforce in coming years).
- But almost 45% of the town's business units are based in job growth sectors: retail, wholesale and motor trades (which currently accounts for more than 15% of Dursley's jobs); professional, scientific and technical (a relatively small employment base though: around 140 jobs); and arts, entertainment, recreation and other services (again, employing only around 140 people). It seems probable that most new retail jobs will tend to be concentrated in the settlements with larger retail bases, such as Dursley's town centre.

- Despite the need for many residents to out-commute to find work, Dursley is actually amongst the better performing settlements in terms of its ability to service the employment needs of its community: a good proportion of workers live locally and the type and range of jobs on offer matches the characteristics of the resident workforce quite well.

Retail role:

- Dursley is one of just five settlements with a strategic retail role, drawing consumers from a wide catchment and providing the most diverse and extensive retail offer.

Community services and facilities:

- Stroud and Dursley stand out as the two settlements with the most extensive range of services and facilities on offer – both at a ‘strategic’ level and at ‘local’ level; these are the District’s principal service towns.
- Dursley has “very good” accessibility to most key services and faculties. Many of these services are actually based within the town, so this is unsurprising.

Berkeley

- Berkeley is one of the District’s larger settlements, providing homes for a population of around 2,000 people. Its principal role is as a dormitory town, with a limited retail and service role.
- There are fewer young people aged 0-19 than average, but a slightly larger-than-average proportion of working age adults amongst the resident population.

Employment role:

- Berkeley has less than ¼ of a job available for every economically active resident. Around 800 jobs are based locally, but the town is not amongst the District’s major employment ‘hubs’.
- Berkeley is amongst the settlements with the lowest proportion of “professionals”: just 16% of Berkeley’s working residents have professional occupations, compared to the District average of 19%.
- The town has amongst the highest proportion of residents working in agriculture and utilities (9%)
- The proportion of residents who work within the District is extremely low (46%) and a below average proportion of residents work in Cheltenham or Gloucester.
- An extremely high proportion of working residents commute south to Bristol, South Gloucestershire, Bath and North Somerset: 32%, which is three times the District average.

Retail and community service roles:

- Berkeley is one of the District’s historic market towns. It has a ‘district centre’, with a range of shops to serve a fairly substantial catchment of surrounding villages and hamlets.
- Berkeley has a very limited ‘strategic’ role in terms of provision of services and facilities that meet the needs of a much wider catchment of surrounding communities. But it offers an excellent level of local services.
- Accessibility to key services and facilities from Berkeley is “poor”.

Frampton on Severn

- This is a medium-sized settlement, a big village with a population of around 1,400. The proportion of young people, working-age adults and over 65s is very close to the District average.
- Frampton on Severn has one of the highest rates of economic activity in the District: 78% (compared to the District average of 73%).

Employment role:

- Frampton has a healthy employment role, although it is not one of the District's big employment bases. Around 800 jobs are available locally and there is slightly more than one job available for every economically active resident.
- However, the proportion of residents who work within 5km of home is well below the District average.

Retail and community service roles:

- Frampton has a very limited 'strategic' role in terms of provision of services and facilities that meet the needs of a wider catchment of surrounding communities (it has a library). But it offers a good level of local services and facilities. With just a single village shop, the settlement has a very minimal, yet essential, retail role.
- Accessibility to key services and facilities elsewhere is "very poor".

Minchinhampton

- With a population of around 3,400, Minchinhampton is one of the District's larger settlements. Its principal role is as a 'dormitory' settlement and local service centre.
- Minchinhampton has an extremely low economic activity rate (just 65% compared to the District average of 73%) below-average rates of both part-time and full-time employment, above-average levels of self-employment and a very high proportion of retirees. Minchinhampton and Painswick have the lowest proportion of working-age adults of all the settlements in this study; combined with the highest proportion of people aged 65+.
- If recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as Minchinhampton could see a significant increase in their retirement-aged population during the Plan period, matched by an equally dramatic shrinking of their working-age population.
- The economically inactive population is projected to grow fastest, and looks set to outstrip any growth in the economically active population.

Employment role:

- Minchinhampton provides around 1,300 jobs – but most of these are based outside the settlement itself, including within the industrial valley bottoms. As an employment provider, Minchinhampton functions contiguously with the adjacent parishes of Brimscombe & Thrupp and Woodchester.
- Minchinhampton has a very high proportion of residents with managerial occupations, directors and senior officials (17% of the working population), and well-above-average numbers of professionals.

- There is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives amongst Minchinhampton's working population.
- More residents here commute long distances to work than from most other settlements in the District. 6% of working residents travel more than 60km to work, which is double the District average (3%).
- The degree of mid- and long-distance travelling to work undertaken by residents of places like picturesque Minchinhampton is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within places like Minchinhampton, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Minchinhampton is one of the District's historic wool-trading market towns. In terms of its retail role, the settlement acts as a 'district centre', with a range of shops serving a fairly substantial catchment of surrounding villages and hamlets. Minchinhampton also "punches above its weight", drawing consumers from much further afield, due to its attractive tourism and leisure offer.
- The village has a limited role as a "strategic" service provider (there is a library), but offers an excellent level of "local" services and facilities.
- Accessibility to services and facilities in other key settlements is "poor".

Nailsworth

- Nailsworth has a resident population of around 5,800: it is the next largest town (in terms of population size) after Dursley.
- Nailsworth exactly matches the District average in terms of its demographic (age) composition: 23% of residents are aged 0-19; 58% are working age adults (20-64); and 19% are over 65.
- It has a close-to-average rate of economic activity (72%), but amongst the economically inactive population the proportion of retirees is well above average (20%). A relatively large proportion of economic inactivity is due to looking after home or family (the highest proportion of all the settlements in this study).

Employment role:

- Nailsworth is one of the District's big employment providers: more than 2,000 jobs are based locally. However, more economically active people live in Nailsworth than there are jobs: the town is a net exporter of workers.
- A very high proportion of Nailsworth residents work within 2km (1.2 miles) of home.
- This is one of the District's best functioning settlements, in terms of its ability to service the employment needs of the local community and match the characteristics of the resident workforce.

Retail and community service roles:

- Nailsworth is one of the District's historic market towns. Today it has a "strategic" retail role, drawing consumers from a wide catchment and providing a diverse and extensive retail offer. Nailsworth also attracts consumers from much further afield, due to its tourism and leisure offer.

- After Stroud and Dursley, Nailsworth is one of a small group of towns which form the next ‘tier’ of strategic service providers. It offers a reasonable range of “strategic” facilities, as well as a full range of “local” services. Nailsworth has a strong community role in meeting the needs of other settlements.

Wotton Under Edge

- With a population of almost 5,000, this is one of the District’s larger residential settlements.
- The demographic (age) composition of Wotton is close to the District average. 23% of residents are aged 0-19; 57% are working age adults (20-64); and 20% are over 65. The economic activity rate of Wotton’s residents is slightly above average (74%).

Employment role:

- Wotton Under Edge is a significant employment provider: round 1,300 jobs are based locally. However, there is only around ½ a job available here per economically active resident. Wotton is a big net-exporter of workers and its principal role is as a ‘dormitory’, where *most* people have no choice but to commute to work elsewhere.
- The proportion of Wotton residents who work within Stroud District is well below average, yet the proportion who work within 2km (1.2miles) of home is amongst the highest of any settlement in the District.
- Very few people travel from here to Cheltenham or Gloucester for work. Whereas 38% of working residents travel south to Bristol, South Gloucestershire, Bath and North Somerset – more than 3 times the District average.
- A relatively high proportion of Wotton residents work in manufacturing. At least 20% of the jobs based locally in Wotton Under Edge and nearby Kingswood are within the manufacturing sector. Manufacturing is forecast to see a significant fall in job numbers by 2031 (including due to ‘efficiency savings’). Settlements with a high dependence on manufacturing for their job supply are likely to be amongst the most vulnerable to future economic fluctuations and/or the continuation of current employment trends in this sector.
- Despite the large net out-flow of workers, Wotton Under Edge is one of the District’s better functioning settlements, in terms of its ability to service the employment needs of the local community and match the characteristics of the resident workforce.

Retail and community service roles:

- One of the District’s historic market towns, Wotton still has a “strategic” retail role, drawing consumers from a wide catchment and providing a diverse and extensive retail offer.
- After Stroud and Dursley, Wotton is one of a small group of towns which form the next ‘tier’ of strategic service providers. It offers a reasonable range of “strategic” facilities, as well as a full range of “local” services and it has a strong community role in meeting the needs of other settlements.

Amberley

- Amberley is amongst the smallest settlements in this study. Although the settlement boundary is quite tightly drawn around a village ‘core’ (and this is what we mean when we refer to “the settlement”), Amberley is quite dispersed in its form: there are outlying areas (such as Theescombe and St Chloe) which, to a large extent, function as part of the settlement and share

many of its characteristics. The “Amberley” population is therefore larger in reality than the figure of 530 would suggest.

- If recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as Painswick, Minchinhampton, Amberley, Bisley, North Woodchester and Oakridge Lynch (which already have a very much higher proportion of older people than elsewhere in the District) could see a significant increase in their retirement-aged population during the Plan period, matched by an equally dramatic shrinking of their working-age population.
- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. Amberley has an economic activity rate of just 68%, well below the District average of 74%. Here, the high rate of economic inactivity appears to be a result of the exceptionally high proportion of (predominantly affluent) retirees.

Employment role:

- Amberley does not have a significant employment role. Employment statistics for Amberley need to be viewed with a certain amount of caution. The total figures for census LSOA 010A have been apportioned between Amberley, North Woodchester and the surrounding rural area, according to a formula (see APPENDIX 2). In reality, though, the majority of jobs based in this geographic LSOA are likely to sit closer to Woodchester and the industrial valley bottom (a significant employment ‘hub’), rather than the settlement of Amberley. So the true employment figures and “employment density” for North Woodchester is probably higher than are shown in tables throughout this study, whilst the figures for Amberley would be lower.
- Amongst the economically active, there is a very high level of self-employment and very low levels of full-time employment, compared to the District average.
- 29% of working residents are described as having professional occupations (well above the District average of 19%) and Amberley has amongst the highest proportion of managers, directors and senior officials in the District.
- There is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives.
- The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Amberley has no significant retail role and provides a basic level of services and facilities: a convenience store and post office, a community hall and primary school.
- Ease of access to services and facilities elsewhere is rated “good”.

Bisley

- Bisley is a relatively small settlement, with a population of around 750.
- If recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as Painswick, Minchinhampton, Amberley, Bisley, North Woodchester

and Oakridge Lynch (which already have a very much higher proportion of older people than elsewhere in the District) could see a significant increase in their retirement-aged population during the Plan period, matched by an equally dramatic shrinking of their working-age population.

- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. Bisley has an economic activity rate of just 69%, well below the District average of 74%, which appears to be a result of the exceptionally high proportion of (predominantly affluent) retirees.

Employment role:

- Bisley does not have a significant employment role. There are around 300 jobs in the area and the settlement is a net exporter of workers. There is a very high level of self-employment and exceptionally high levels of home-working (28% of working residents are based mainly at home, as compared to the District average of 14%).
- Amongst the economically active, there is a very high level of self-employment and very low levels of full-time employment, compared to the District average.
- 23% of working residents are described as having professional occupations (well above the District average of 19%) and Bisley has the highest proportion of managers, directors and senior officials amongst its working population of all settlements in this study (20%).
- There is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives.
- Only 42% of working residents have jobs based within the District. A much higher proportion than average commute to Cheltenham, Gloucester and out of the County to the South East (including London).
- The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Bisley has no significant retail role (there is a village shop) but provides a good range of local services and facilities.
- Ease of access to services and facilities elsewhere is rated “very poor”.

Brimscombe

- Brimscombe has a population of around 2,370, making it a significant residential settlement.
- It is a complex settlement, closely related (geographically and functionally) to adjoining Thrupp. Whilst the settlement boundary lies mostly within Brimscombe & Thrupp Parish, small parts extend into Minchinhampton and Chalford parishes.
- Interestingly, Brimscombe appears to tally with the Stroud District average in many census data sets, including its demographic make-up: a healthy balance of 23% children and young people (under 19), 58% working aged adults, and 19% over 65s.

- The economic activity rate of 73% matches the District average.

Employment role:

- Brimscombe forms part of a valuable employment 'hub', strung along the industrial valley bottom between Stroud/Thrupp and Chalford. Around 1,300 jobs are based at Brimscombe and there is slightly more than one job available per economically active resident (making Brimscombe one of the few settlements that are net importers of workers).
- Brimscombe draws many of its workers from a fairly local catchment (between 2-5km), while 60% of working residents have jobs within the District (much higher than the District average of 54%). It seems to be amongst the best performing settlements in terms of its ability to service the employment needs of the local community; the type and range of jobs on offer matches the characteristics of the resident workforce quite well.

Retail and community service roles:

- Brimscombe has a basic level of local retail provision and a limited range of local community services and facilities. Access to services and facilities elsewhere is "fair".

Chalford

- Chalford has a population of nearly 3,000, making it one of the District's larger settlements.
- At 73%, the level of economic activity amongst the resident population matches the Stroud District average.
- There are slightly more children and young people in the resident population than average (27%), and slightly fewer working age adults (55%). The proportion of over-65s is 19%, which matches the District average.

Employment role:

- There are around twice as many residents available to work than jobs available. Hence Chalford's principal role is as a 'dormitory', where *most* people have no choice but to commute to work elsewhere. Chalford also has a high level of self-employment.
- However, there are around 800 jobs based locally, forming part of a valuable employment 'hub', strung along the industrial valley bottom between Stroud/Thrupp and Chalford. A high proportion of jobs available locally are based in the manufacturing sector.
- More than ¼ of all working residents are described as having professional occupations, and 17% have managerial occupations or roles as directors and senior officials. Meanwhile there is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives
- The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Chalford has a basic level of local retail provision and a limited range of local community services and facilities. Access to services and facilities elsewhere is "poor".

Coaley

- With a population of around 600+, Coaley is one of the smallest settlements in this study. Its principal role is as a residential settlement.
- Coaley is typical of a group of small settlements which have below-average rates of economic activity (70%). Like others, Coaley has a relatively elderly population with a relatively small proportion of working-age adults (when compared to the District average).

Employment role:

- Coaley does not have a significant employment role. Fewer than 200 jobs are based in the area. There is only around half of a job available locally per economically active resident, meaning that the huge majority of residents have no choice but to commute to elsewhere for employment.
- A quarter of the working population is described as having professional occupations.
- Amongst the economically active population, there is a high level of self-employment and a relatively low level of full-time employment.
- At 60%, the proportion of working residents whose jobs are based within Stroud District is well above average, as is the proportion who work from home (21%). However, the proportion who are able to work within 2km of home is tiny: just 2% compared to the District average of 14%, this is the lowest proportion of all settlements in the study.
- Despite being located close to the railway station at Cam, the proportion of residents who travel between 40-60km to work is also very small: just 1%. More people travel 60km+ (3%, which is average for the District as a whole). Of those travelling out of Stroud District to work, the main destinations are Gloucester and Bristol / South Gloucestershire.

Retail and community service roles:

- Coaley has a basic level of local retail provision but a good range of local community services and facilities. Access to services and facilities elsewhere is “very poor”.

Eastington

- Eastington has a population of 1,500+. A medium-sized settlement, which has seen housing growth of 11% since 2001 (a rate which is representative of the Stroud District as a whole).
- At 74%, the level of economic activity amongst the resident population is close to the Stroud District average.
- There are slightly fewer children and young people in the resident population than average (22%), and slightly more over 65s (20%). The proportion of working age adults matches the District average (58%).

Employment role:

- With slightly in excess of 1 job per economically active resident, Eastington is among the few settlements that are net importers of workers. There are more than 900 jobs based in and around the Eastington settlement, making a notable contribution to the District’s employment supply.
- The largest employment sectors (in terms of numbers of jobs available) are: construction; retail, wholesale and motor trades; and transport and storage. These are all sectors where the workforce is forecast to grow during the next decade and a half.

- Eastington has a below-average representation of both “professional” and “associate professional and technical” workers in its resident population.
- 18% of working residents are based at home, which is well above the District average (14%). However, the proportion of residents who travel less than 2km to their place of work is below average (9%). Beyond Stroud District, the most common workplace for residents is Gloucester.

Retail and community service roles:

- Eastington has a basic level of local retail provision. It has a reasonable range of local community services and facilities, but no ‘strategic’ role.
- Access to services and facilities elsewhere is “poor”.

Hardwicke

- Hardwicke has a population of nearly 4,000, making it one of the District’s larger settlements. Its principal role is as a ‘dormitory’ settlement for its large working population.
- At 81%, the level of economic activity amongst the resident population is considerably higher than the District average (73%) and in fact higher than any other settlement in this study.
- 23% of the resident population consists of children and young people, which matches the District average; but there are considerably more working age adults than average (65%, the biggest proportion of all settlements in this study). Meanwhile, the proportion of over-65s is just 12%, which is lowest of all settlements in this study.

Employment role:

- There is only around half of a job available locally per economically active resident, meaning that the huge majority of residents have to commute elsewhere for employment.
- Although Hardwicke exports many thousands of workers, there are over 1,000 jobs available locally. So the area is one of the District’s employment hot-spots.
- Along with Upton St Leonards, Hardwicke has the lowest proportion of residents with jobs in Stroud District of any settlement in this study: just a tiny 23% (compared to the District average of 54%). The main workplace destination is Gloucester, which is unsurprising given Hardwicke’s location on the city border.

Retail and community service roles:

- Hardwicke has a basic level of local retail provision and a limited range of local community services and facilities. Access to services and facilities elsewhere is “fair”.

Horsley

- Horsley has the smallest population of all settlements in this study: just 400.
- In common with many of the smaller settlements (such as Amberley, Bisley, North Woodchester, Oakridge Lynch), Horsley has a below-average economic activity rate (although, at 70% this is not amongst the very lowest). Like others in this group, Horsley has above-average levels of self-employment and below-average levels of full-time employment. However, the proportion of retirees amongst the village’s economically inactive population is only 1% above the District average (unlike in the other settlements mentioned above).

- The demographic make-up of Horsley is quite different to that of many other small settlements with low economic activity rates: 24% children and young people (1% more than the District average); 57% working age adults (1% below average); and 18% over-65s (1% below average).

Employment role:

- Horsley has no significant employment role and a relatively high proportion of the 100+ jobs that are based here are down to high levels of self-employment and home-working (21% of working residents are based mainly at home, as compared to the District average of 14%).
- 26% of working residents are described as having professional occupations (well above the District average of 19%) and Horsley has one of the highest proportions of residents with associate professional and technical occupations of all settlements in this study (15%).
- There is a significant under-representation of people who work in administrative or secretarial roles and slightly below average proportions working in manufacturing, construction or agriculture; but the proportion of residents who work in public administration, education or health is higher than any other settlement in the study (32%, well above the District average of 28%).
- 59% of working residents have jobs based within the District, which is above average. Of those commuting out of the District, the most common destination is Cotswold District.

Retail and community service roles:

- Horsley has no significant retail role (there is a village shop), but provides a reasonable range of local services and facilities.
- Access to services and facilities elsewhere is rated as “fair”.

Kingswood

- Kingswood is a medium sized settlement, with a population of nearly 1, 400. Since 2006, the number of dwellings in Kingwood has increased by 15%, the fastest (proportionate) growth rate of any settlement in this study and double the District-wide average (7%).
- At 74%, the level of economic activity amongst the resident population is very close to the District average (73%).
- Kingswood has amongst the highest proportions of young people (28%) and the lowest proportions of over-65s (16%) of all settlements in this study.

Employment role:

- Kingswood has a very strong employment role. There are nearly 1,200 jobs based locally, which gives Kingswood 1.63 jobs per economically active resident – a ratio only bettered by Stonehouse. Kingswood is a net importer of more than 400 workers.
- Despite this (perhaps rather surprisingly), the proportion of working residents who travel less than 5km to work is well below average. And only 43% work within Stroud District (as compared to the District average of 54%). The most common workplace destination is Bristol / South Gloucestershire: 38% of Kingswood’s working population travel south to these locations, which is more than 3 times higher than the District average (11%). This is not surprising, given the village’s location on the southern border with South Gloucestershire.
- By far the biggest employment sector here is manufacturing (Renishaw is a major engineering company on the outskirts of Kingswood). Professional, scientific and technical jobs also make up a significant proportion of the jobs on offer locally; followed by retail, wholesale and motor trades, and education.

Retail and community service roles:

- Kingswood has a basic level of local retail provision and a limited range of local community services and facilities. Access to services and facilities elsewhere is “fair”.

Kings Stanley

- Kings Stanley has a population of 1,500+, a medium sized settlement. Its principal role is as a ‘dormitory’ settlement for its working population of nearly 800.
- At 71%, the level of economic activity amongst the resident population is slightly below the District average.
- There are slightly fewer children and young people in the resident population than average (21%), and slightly fewer working age adults (57%). The proportion of over-65s is 22%, which is above average.

Employment role:

- There is less than half a job available here per 1 economically active resident: most people have no choice but to commute elsewhere for work – making Kings Stanley’s principal role that of a ‘dormitory’ settlement.
- However, the proportion of residents who are able to travel between 2-5km to their place of work is very high (25%), suggesting that many residents work at nearby Stonehouse.
- 60% of residents work within Stroud District and, of those who commute out, the majority travel to Gloucester.

Retail and community service roles:

- Kings Stanley has a good level of local retail provision, and a good range of local community services and facilities. Access to services and facilities elsewhere is “fair”.
- Kings Stanley and Leonard Stanley have a very close functional and geographic relationship. In particular, Leonard Stanley (which has no retail facilities at all) relies on the services available here.

Leonard Stanley

- Leonard Stanley has a population of 1,400+, a medium sized settlement. Its principal role is as a ‘dormitory’ settlement for its working population of around 750.
- At 70%, the level of economic activity amongst the resident population is below the District average.
- There are slightly fewer children and young people in the resident population than average (21%), and a smaller than average proportion of working age adults (55%). The proportion of over-65s is 24%, which is well above average.

Employment role:

- There is less than half a job available here per 1 economically active resident: most people have no choice but to commute elsewhere for work – making Leonard Stanley’s principal role that of a ‘dormitory’ settlement.
- However, the proportion of residents who are able to travel between 2-5km to their place of work is very high (25%), suggesting that many residents work at nearby Stonehouse.

- 60% of residents work within Stroud District and, of those who commute out, the majority travel to Gloucester.

Retail and community service roles:

- Kings Stanley and Leonard Stanley have a very close functional and geographic relationship. In particular, Leonard Stanley (which has no retail facilities at all) relies on the services available within its neighbouring village.
- Leonard Stanley has a reasonable range of local community services and facilities. Access to services and facilities elsewhere is “fair”.

Manor Village

- Manor village has a population of 2,800+, making it one of the District’s larger settlements. Its principal role is as a ‘dormitory’ settlement for its large working population.
- At 78%, the level of economic activity amongst the resident population is considerably higher than the District average.
- There are slightly more children and young people in the resident population than average (25%), and slightly more working age adults (60%). The proportion of over-65s is just 15%, which is almost the lowest of all settlements in this study (only Hardwicke is lower, at 12%).

Employment role:

- There is only around 1/3 of a job available locally per economically active resident, which is the lowest ratio of all settlements in this study. The huge majority of residents have to commute to elsewhere for employment.

Retail and community service roles:

- Manor Village has a basic level of local retail provision and a limited range of local community services and facilities. Access to services and facilities elsewhere is “fair”.

Newtown & Sharpness

- Newtown & Sharpness (historically two separate settlements really) is a medium sized settlement, with a population of around 1,400. Since 2006, the number of dwellings in Newtown & Sharpness has increased by 14%, the second fastest (proportionate) growth rate of any settlement in this study and double the District-wide average (7%).
- At 78%, the level of economic activity amongst the resident population is above the District average (73%). There is a higher proportion of working age adults amongst the population than the District average (60%).

Employment role:

- Around 500 jobs are based here, despite this being home to a significant amount of employment land, including the docks. There is only 0.65 of a job per economically active resident: Newtown & Sharpness is a net exporter of around 270 workers.
- Only 46% of working residents are employed within Stroud District. 32% commute over the border to South Gloucestershire and Bristol.
- 10% of the settlement’s working residents are employed in agriculture, energy and water – which is far in excess of the District average for this sector (just 4%). The biggest employment sector (as is the case District wide) is public administration, education and health.

- The biggest employment providers (in terms of numbers of jobs based here) are: energy water and utilities; construction; and retail, wholesale and motor trades.

Retail and community service roles:

- Newtown & Sharpness has a basic level of local retail provision and a good range of local community services and facilities. Access to services and facilities elsewhere is “very poor”.

North Nibley

- North Nibley has a population of around 500+, making it one of the smallest settlements in this study.
- The village has a higher proportion of older people combined with a relatively small proportion of working-age adults, when compared to the District average.
- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. North Nibley has an economic activity rate of 71%, which is below the District average of 74%, but not as strikingly low as some other settlements with a similar ‘profile’. This low economic activity rate appears to be a result of the relatively high proportion of retirees (making up 20% of the economically inactive population).

Employment role:

- North Nibley does not have a significant employment role. There are around 200 jobs based locally, which equals around ¾ of a job per economically active resident.
- Amongst the economically active, there is a very high level of self-employment and low levels of full-time employment, compared to the District average.
- 29% of working residents are described as having professional occupations (well above the District average of 19%). There is an under-representation of residents who work in manufacturing, sales and customer services and process, plant and machine operatives.
- 21% of working residents are based mainly at home (well above the District average of 14%), while only 43% travel to a workplace within Stroud District and only a tiny 6% are able to work within 2km of home.

Retail and community service roles:

- North Nibley has no significant retail role (there is a village convenience store), but provides a good range of local services and facilities.
- Ease of access to services and facilities elsewhere is rated “fair”.

North Woodchester

- North Woodchester has a population of around 630, making it one of the smaller settlements in this study. It has a close physical and functional relationship with neighbouring South Woodchester (a lower tier settlement, not included in this study).
- The village has a higher proportion of older people combined with a relatively small proportion of working-age adults, when compared to the District average.
- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. North Woodchester has an economic activity rate of just 68%, well below the District average of 74%, which appears to be a result of the exceptionally high proportion of (predominantly affluent) retirees.

Employment role:

- The village itself (i.e. within the settlement boundary) contains few jobs. However, Woodchester parish (particularly along the main road and the industrial valley bottom) *is* a significant employment base. The figures in the study estimate there to be around 430 jobs in the immediate locality. However, these statistics need to be viewed with a certain amount of caution: the total figures for census LSOA 010A have been apportioned between Amberley, North Woodchester and the surrounding rural area, according to a formula (see APPENDIX 2). In reality, though, the majority of jobs based in this geographic LSOA are likely to sit closer to Woodchester and the industrial valley bottom, rather than the settlement of Amberley. So the true employment figures and “employment density” for North Woodchester is probably higher than are shown in tables throughout this study, whilst the figures for Amberley would be lower.
- Amongst the economically active, there is a very high level of self-employment and low levels of full-time employment, compared to the District average.
- 29% of working residents are described as having professional occupations (well above the District average of 19%) and there is a high proportion of managers, directors and senior officials.
- There is a significant under-representation of residents who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives. This is odds with the local employment offer, which relies heavily on these sectors.
- Nevertheless, there is a healthy local-workforce supply: a higher than average proportion of North Woodchester residents commute between 2-5km to their place of work, while 22% of people coming into work here live within 2-5km (far exceeding the District average of 15%).
- However, at the other extreme, the area is also characterised by long-distance out-commuting. The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- North Woodchester has no significant retail role (there is a village convenience store), but provides a good range of local services and facilities.
- Ease of access to services and facilities elsewhere (rated “very good”) is amongst the best outside of any main settlement.

Oakridge Lynch

- Oakridge Lynch is amongst the smallest settlements in this study, with a population of around 630.
- If recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as Painswick, Minchinhampton, Amberley, Bisley, North Woodchester and Oakridge Lynch (which already have a very much higher proportion of older people than elsewhere in the District) could see a significant increase in their retirement-aged population during the Plan period, matched by an equally dramatic shrinking of their working-age population.

- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. Oakridge has an economic activity rate of just 69%, well below the District average of 74%. This appears largely to be a consequence of the exceptionally high proportion of (predominantly affluent) retirees.

Employment role:

- Oakridge Lynch has no significant employment role and a high proportion of the jobs based here are due to high levels of self-employment and home-working (28% of working residents are based mainly at home, as compared to the District average of 14%).
- 23% of working residents are described as having professional occupations (well above the District average of 19%) and along with Bisley, Oakridge Lynch has the highest proportion of managers, directors and senior officials amongst its working population of all settlements in this study (20%).
- There is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives.
- Only 42% of working residents have jobs based within the District. A much higher proportion than average are commuting to Cheltenham, Gloucester and out of the County to the South East (including London).
- The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move into or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Oakridge has no significant retail role (there is a village shop), but provides a good range of local services and facilities.
- Of all settlements in this study, Oakridge Lynch has the worst and most difficult access to services and facilities elsewhere.

Painswick

- Painswick has a population of around 2,400, making it one of the larger settlements in the District.
- Amongst the District's largest settlements, Minchinhampton and Painswick stand out from the prevailing trends. Like the smallest settlements, these two towns have extremely low economic activity rates (just 65% and 63% respectively, as compared to the District average of 73%), below-average rates of both part-time and full-time employment, above-average levels of self-employment and a very high proportion of (mostly affluent) retirees. These two settlements have the lowest proportion of working-age adults of all the settlements in this study; combined with the highest proportion of people aged 65+
- If recent trends of in- and out-migration, births, deaths and household types were to continue, then settlements such as Painswick could see a significant increase in its retirement-aged population during the Plan period, matched by an equally dramatic shrinking of their working-age population.

Employment role:

- Around 850 jobs are based locally, but the majority of residents work elsewhere.
- A high proportion of the jobs based in Painswick are down to self-employment and home-working (26% of working residents are based mainly at home, as compared to the District average of 14%).
- 29% of working residents are described as having professional occupations (well above the District average of 19%) and Painswick has amongst the greatest proportion of managers, directors and senior officials in its working population (19%).
- There is a significant under-representation of people who work in manufacturing, skilled trades, caring, leisure and other services, sales and customer services and process, plant and machine operatives.
- Only 42% of working residents have jobs based within the District. A much higher proportion than average commute to Cheltenham, Gloucester, Cotswold District and out of the County to the South East (including London).
- The degree of mid- and long-distance travelling to work undertaken by residents of places like Painswick, Minchinhampton, North Woodchester, Amberley, Bisley, Chalford and Oakridge Lynch is only partly due to geography, and substantially due to lifestyle choice. The lack of suitable jobs available locally and within the District is a factor, but these settlements will always be attractive to high-earning professionals and affluent retirees: there will always be a pool of people who will choose to move in to or stay within these settlements, regardless of the type and quantity of employment on offer locally.

Retail and community service roles:

- Painswick has a retail role similar to that of Berkeley, Minchinhampton and Cam. There is a good range of shops, serving a fairly substantial catchment of surrounding villages and hamlets. Painswick also draws consumers from much further afield, due to its attractive tourism and leisure offer.
- Painswick is notable for its range of local services and facilities, which is comparable with any of the higher tier “Local Service Centres”. In fact it scores the same as Berkeley for both strategic and local service provision. The town is quite limited in terms of its ‘strategic’ role though. However, it offers an excellent level of ‘local’ services and facilities.
- Ease of access to key services and facilities is ranked as “good”.

Slimbridge

- Slimbridge has a population of nearly 800, making it a medium sized settlement.
- The village has a higher proportion of older people combined with below average proportions of working-age adults and children and young people.
- There is a very broad trend that the lowest rates of economic activity tend to be seen within the smallest settlements. Slimbridge has an economic activity rate of 68%, which is amongst the lowest of all settlements in this study. This low economic activity rate appears to be a result of the relatively high proportion of retirees (making up 20% of the economically inactive population).

Employment role:

- Slimbridge does not have a significant employment role. There are around 400 jobs based locally, which is roughly equal to the number of economically active residents, making this a very 'balanced' employment function.
- However, the proportion of residents who actually work within 2km of home is very low (5%) – well below the District average of 14%. And there is a similarly low proportion of working residents who travel between 2-5km to work. The most common workplace destinations (outside of the Stroud District) are Gloucester, Bristol/South Gloucestershire, and Cheltenham.
- Amongst the economically active, there is an above-average level of self-employment and slightly below-average levels of full-time employment, compared to the District average.
- The proportion of residents whose jobs are based in agriculture or utilities is 9%, well above the District average (4%) and the second highest proportion of all settlements in this study. A high proportion work in public administration, education and health (31%).

Retail and community service roles:

- Slimbridge has no significant retail role (there is a village convenience store), but provides a good range of local services and facilities.
- Ease of access to services and facilities elsewhere is rated "poor".

Uley

- With a population of more than 1,000, Uley is a medium-sized settlement: a large village. Its principal role is as a residential settlement.
- Uley has slightly below average rate of economic activity (71%). Uley has a relatively elderly population (23% are aged 65+, as compared to the District average of 19%), and there are fewer children and young people and fewer working age adults than the District average.

Employment role:

- Uley is not a major employment provider. There are around 300 jobs based locally. And there is only around half of a job available locally per economically active resident, meaning that the huge majority of residents have no choice but to commute to elsewhere for employment.
- A quarter of the working population is described as having professional occupations and a high proportion are self-employed.
- At 60%, the proportion of working residents whose jobs are based within Stroud District is well above average, as is the proportion who work from home (19%). However, the proportion who are able to work within 2km of home is tiny: just 3% compared to the District average of 14%. Of those travelling out of Stroud District to work, the main destinations are Gloucester and Bristol / South Gloucestershire.

Retail and community service roles:

- Uley has a basic level of local retail provision but a good range of local community services and facilities. Access to services and facilities elsewhere is "good".

Upton St Leonards

- With a population of more than 1,000, Upton St Leonards is a medium sized settlement – one of the District's larger villages. Its principal role is as a 'dormitory' settlement.

- At 73%, the level of economic activity amongst the resident population matches that of the Stroud District as a whole.
- The proportion of children and young people, working age adults and over-65s is very close to the District average.

Employment role:

- Upton St Leonards is not a significant employment destination for our District, although there are around 800 jobs provided locally.
- Along with Hardwicke, Upton St Leonards has the lowest proportion of residents with jobs based within Stroud District of any settlement in this study: just a tiny 23% (compared to the District average of 54%). The main workplace destination is Gloucester: 41% of the area's residents work there, as compared to the District average of just 12%, which is unsurprising given Upton's location on the city border.

Retail and community service roles:

- Upton has a basic level of local retail provision, but a good range of local community services and facilities. Access to services and facilities elsewhere is "fair".

Whiteshill & Ruscombe

- With a population of around 1,000, Whiteshill & Ruscombe (historically and physically two separate villages really) is a medium sized settlement – one of the District's larger villages. Its principal role is as a 'dormitory' settlement. The village has seen only a 2% increase in the number of dwellings between 2006 and 2014 – one of the slowest growth rates of all the settlements in the study during that period, and well below the District-wide rate of 7%.
- At 74%, the level of economic activity amongst the resident population is similar to that of the Stroud District as a whole.
- The proportion of children and young people, working age adults and over-65s is close to the District average, but with a slightly smaller proportion of working age adults.

Employment role:

- Whiteshill & Ruscombe does not have a significant employment role. With around 200 jobs and about 0.38 of a job available per economically active resident, the majority of residents have no choice but to commute elsewhere to work.
- A huge proportion of working residents travel between 2-5km to work (23%). Many will be destined for Stroud or Stonehouse. 65% have jobs based in the District and 17% work from home.
- The proportion of professionals amongst the resident population is well above average, as is the proportion of associate professional and technical workers. Workers in public administration, education and health; and financial, real estate, professional and administrative activities are also slightly over-represented here, compared to the District average.

Retail and community service roles:

- Whiteshill & Ruscombe has a basic level of local retail provision, and a reasonable range of local community services and facilities.
- Access to services and facilities elsewhere is "very good" – in fact, Whiteshill & Ruscombe has the best, easiest access of any settlement after Stroud, Cam and Dursley: probably due to its proximity to Stroud.

Whitminster

- With a population of nearly 900, Whitminster is a medium sized settlement – one of the District’s larger villages. Its principal role is as a ‘dormitory’ settlement.
- At 76%, the level of economic activity amongst the resident population is above the Stroud District average.
- Whitminster has a slight under-representation of children and young people (22%), and a slight over-representation of working age adults (59%). The proportion of over-65s matches the District average.

Employment role:

- There are almost 700 jobs in the area, which gives Whitminster a very healthy ratio of 1.41 jobs per economically active resident.
- Yet the proportion of residents who work within 2km of home is very low, just 6% - less than half the District average. 51% have jobs based within the District, which is also slightly below average. The most common out-of-District destinations are Gloucester, South Gloucestershire / Bristol and Cheltenham.
- Amongst the businesses based locally, the most common industry sectors are agriculture/forestry/fishing and retail, wholesale and motor trades. The sectors providing the highest numbers of jobs are: construction; retail, wholesale and motor trades; transport and storage; and health and social work.
- The proportion of professionals amongst the resident population is well above average, as is the proportion of associate professional and technical workers. Workers in public administration, education and health; and financial, real estate, professional and administrative activities are also slightly over-represented here, compared to the District average.

Retail and community service roles:

- Whitminster has a good, diverse local retail offer. It also provides a good range of local community services and facilities. Access to services and facilities elsewhere is “fair”.

APPENDICES

APPENDIX 1:

Settlements in Stroud District

(As defined in the adopted Stroud District Local Plan 2005)

There are a total of 54 defined settlements, although Cainscross and Rodborough form part of the Stroud settlement and share a single settlement 'boundary'.

The 31 settlements shown in italics are classified within one of the top three tiers of the draft Stroud District settlement hierarchy (policy CP3) in the emerging Stroud District Local Plan. These 31 settlements have been used as the basis of this study. The study also makes reference to "Hunts Grove", which is a large housing allocation that straddles the boundary between Hardwicke and Haresfield parishes. Once complete, Hunts Grove will become a settlement within the district hierarchy.

Alderley parish

No defined settlements

Alkington parish

Newport

Arlingham parish

Arlingham

Berkeley parish

Berkeley

Bisley parish

Bisley

Eastcombe

Oakridge Lynch

Brookthorpe with Whaddon parish

Brookthorpe

Cainscross parish

Cainscross (part of the Stroud settlement)

Cam parish

Cam

Chalford parish

Bussage

Chalford

France Lynch

Manor Village

Coaley parish

Coaley

Cranham parish

Cranham

Dursley parish

Dursley

Eastington parish

Eastington

Elmore

No defined settlements

Frampton on Severn parish

Frampton on Severn

Fretherne with Saul parish

Saul

Frocester parish

No defined settlements

Ham and Stone parish

Stone

Hamfallow / Hinton parishes

Newtown and Sharpness

Hardwicke parish

Hardwicke

Harescombe parish

No defined settlements

Haresfield parish

Haresfield

Hillesley and Tresham

Hillesley

Horsley parish

Horsley

Kings Stanley parish

Kings Stanley
Middleyard
Selsley

Kingswood parish

Kingswood

Leonard Stanley parish

Leonard Stanley

Longney and Epney parish

Longney

Minchinhampton parish

Amberley
Box
Minchinhampton

Miserden parish

Miserden

Moreton Valence parish

No defined settlements

Nailsworth parish

Nailsworth

North Nibley parish

North Nibley

Nymphsfield parish

Nymphsfield

Owlpen

No defined settlements

Painswick parish

Painswick
Sheepscombe

Pitchcombe parish

No defined settlements

Randwick parish

Randwick

Rodborough parish

Rodborough (part of the Stroud settlement)

Stroud parish

Stroud (part of the Stroud settlement)

Stonehouse parish

Stonehouse

Brimscombe & Thrupp parish

Brimscombe
Thrupp

Uley parish

Uley

Upton St Leonards parish

Upton St Leonards

Whiteshill & Ruscombe parish

Whiteshill & Ruscombe

Whitminster parish

Whitminster

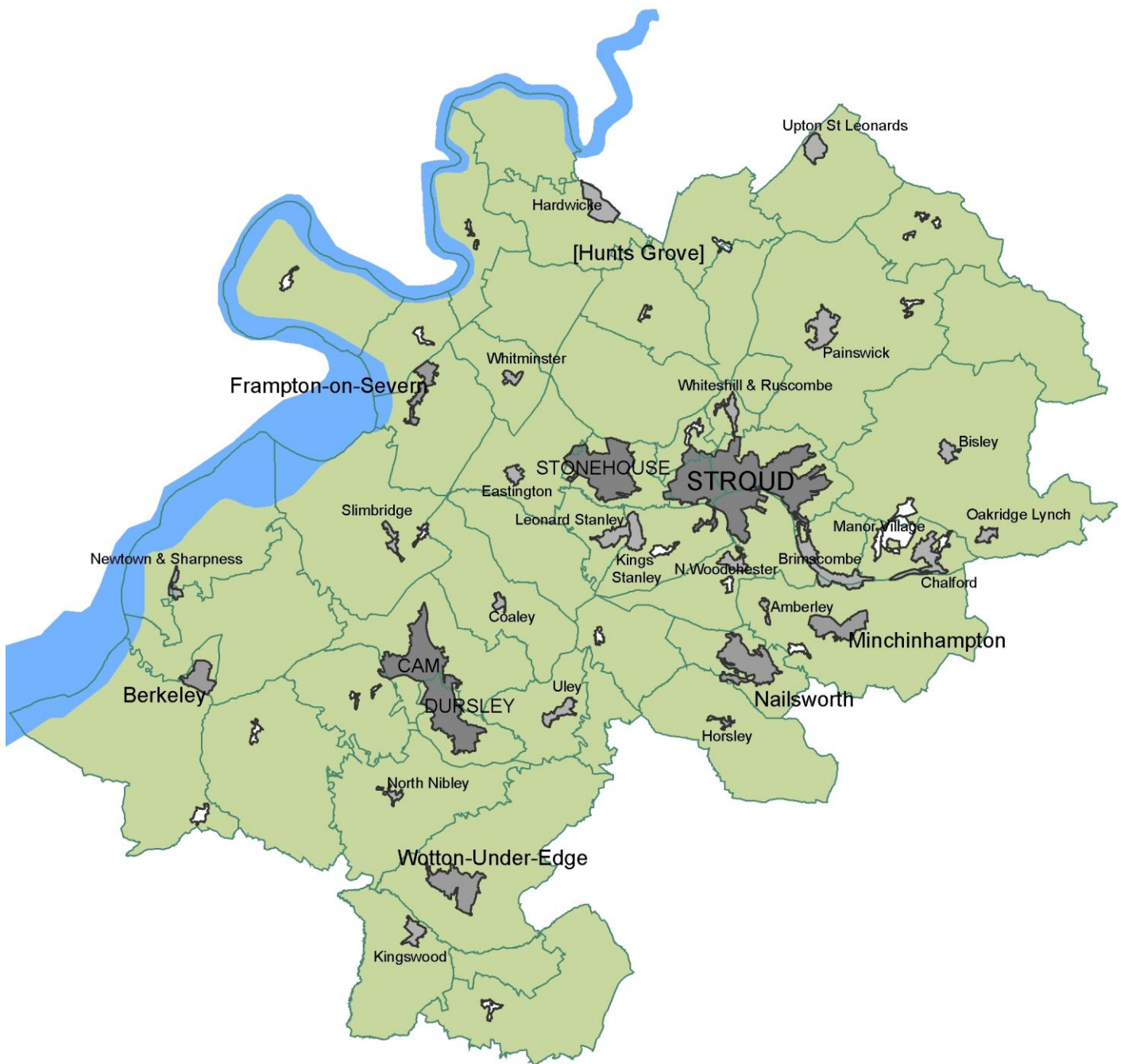
Woodchester parish

North Woodchester
South Woodchester

Wotton Under Edge parish

Wotton Under Edge

Settlements and parishes in Stroud District:



- Settlements included in this study:**
 Settlements classified in tiers 1-3 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Settlements excluded from this study:**
 Small settlements classified in tiers 4 or 5 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Parish boundaries**

APPENDIX 2:

Methodology for aggregating and apportioning data from census Lower Super Output Areas (LSOAs).

Statistics for each settlement have generally been aggregated from figures relating to either ‘Lower Super Output Areas’ (LSOA) or ‘Middle Super Output Areas’ (MSOA). These are geographical areas, defined by the ONS as a means of presenting localised census data in a consistent way (rather than by parish or ward, the boundaries of which are more prone to change and the scale of which is inconsistent). These geographies are also used to present a range of other national statistics, including labour statistics and indices of deprivation.

- Output Areas (OAs): these are the smallest census output areas, with a minimum size of 100 residents and 40 households
- **Lower Super Output Areas (LSOAs) are aggregations of OAs. They have a minimum size of 1,000 residents and 400 households**
- Middle Super Output Areas (MSOAs) are aggregations of LSOAs, with a minimum size of 5,000 residents and 2,000 households

Most of the statistical data used in this report is available at LSOA level. Because almost all LSOAs do not correspond exactly with individual settlement boundaries (and many cover more than one settlement and/or surrounding rural land), it is rarely possible to attribute figures precisely to specific settlements. Instead, totals (or averages) for each settlement have been *estimated* by aggregating the figures for all the LSOAs that cover/sit within each settlement boundary. **They must therefore be viewed as indicative, rather than factually exact.** Some of the larger settlements are exceptions to this rule, though: the LSOA boundaries around Stroud, Stonehouse, Cam and Dursley correspond quite closely to their settlement boundaries. Therefore the data can reliably be attributed to these settlements, without the need to adjust or estimate.

Methodology:

1. An estimate of each settlement’s population was calculated, using parish population statistics, census output area statistics and geographical mapping data.
 2. LSOAs were apportioned between the settlements on the basis of estimated settlement population.
- e.g. Berkeley’s population is estimated to be 2,000. The town’s settlement boundary straddles two LSOAs (012B and 012C). 100% of LSOA 012C falls inside the settlement boundary, so 100% of the data can be applied to this settlement. But only 45% of the data from LSOA 012B can be directly applied to Berkeley, because some of it must be apportioned to the rural surroundings, which includes several other small hamlets and villages. So the total population for LSOA 012B is multiplied by 45% and then added to the total population of LSOA 012C, which brings us close to the estimated population of the settlement (2,000):

Estimated population of Berkeley = 2,000	Pop. of LSOA Stroud 012B:	1350	Multiply by 45%	= 607
	Pop. of LSOA Stroud 012C:	1419	Multiply by 100%	= 1419
	<i>TOTAL:</i>	= 2769	<i>Adjusted total:</i>	= 2026

3. These percentage ‘adjustments’ could then be used as a basis to apportion other Lower Super Output Area data to the Berkeley settlement.

LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 010A	Amberley	530	2116	25%	= 529	LSOA total apportioned between Amberley, Woodchester and other small settlements
Stroud 012B	Berkeley	2,000	1350	45%	607	These two LSOAs have been apportioned between Berkeley and its extensive rural surroundings, including several hamlets and farmsteads
Stroud 012C	Berkeley		1419	100%	1419	
<i>Berkeley total:</i>			<i>= 2769</i>	<i>Apply adjustment:</i>	= 2026	
Stroud 002A	Bisley	750	2142	35%	= 749	LSOA data apportioned between Bisley, Oakridge Lynch, Manor Village, Eastcombe and extensive rural surroundings
Stroud 007D	Brimscombe (20% part of)	2,350	1071	50%	535	Brimscombe is split across six complex LSOAs. The individual LSOAs have been apportioned between Brimscombe/Thrupp, Minchinhampton, Chalford, Bussage and extensive rural surroundings, including several small hamlets and farmsteads
Stroud 007E	Brimscombe (50% part of)		1256	80%	1004	
Stroud 008C	Brimscombe (10% part of)		1396	23%	321	
Stroud 010B	Brimscombe (5% part of)		1611	6%	96	
Stroud 010C	Brimscombe (5% part of)		1325	15%	198	
Stroud 010D	Brimscombe (10% part of)		1421	15%	213	
<i>Brimscombe total:</i>		<i>= 8080</i>	<i>Apply adjustment:</i>	= 2370		
Stroud 011A	Cam	8,160	1492	100%	1492	All six LSOAs apportioned entirely to Cam: no other settlements are included in these areas, nor significant amounts of surrounding rural land (apart from 011B, which includes a couple of small hamlets and farmsteads, which in many ways function as part of the main Cam settlement)
Stroud 011B	Cam		1394	100%	1394	
Stroud 011C	Cam		1248	100%	1248	
Stroud 011D	Cam		1159	100%	1159	
Stroud 011E	Cam		1755	100%	1755	
Stroud 011F	Cam		1114	100%	1114	
<i>Cam total:</i>		<i>= 8162</i>	<i>No adjustment:</i>	= 8162		

LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 008A	Chalford	2,900	1784	85%	1516	The data for these two LSOAs has been apportioned between Chalford, France Lynch and Manor Village
Stroud 008B	Chalford		1655	85%	1406	
<i>Chalford total:</i>			= 3439	<i>Apply adjustment:</i>	= 2923	
Stroud 009A	Coaley	630	1240	60%	= 744	LSOA data apportioned between Coaley and Uley
Stroud 014A	Dursley	6,700	1772	100%	1772	All four LSOAs apportioned entirely to Dursley: no other settlements are included in these areas, nor significant amounts of surrounding rural land outside of the Dursley settlement boundary
Stroud 014B	Dursley		1701	100%	1701	
Stroud 014C	Dursley		1963	100%	1963	
Stroud 014D	Dursley		1261	100%	1261	
<i>Dursley total:</i>			= 6697	<i>Apply adjustment:</i>	= 6697	
Stroud 003A	Eastington	1,580	1794	88%	= 1578	LSOA apportioned between Eastington and extensive rural surroundings, including Standish
Stroud 003B	Frampton on Severn (50% Part of)	1,400	1711	40%	684	Two LSOAs apportioned between Frampton, Whitminster, Arlingham, Saul and extensive rural surroundings
Stroud 003C	Frampton on Severn (50% Part of)		1913	39%	746	
<i>Frampton total:</i>			= 3624	<i>Apply adjustment:</i>	= 1430	
Stroud 001B	Hardwicke (30% part of)	3,900	1436	100%	1436	With the exception of 001B (which sits entirely within the Hardwicke settlement boundary), these are very large rural LSOAs. Totals apportioned between Hardwicke, Hunts Grove, Longney/Epney, Haresfield and extensive rural surroundings. (NOTE: Hunts Grove was developed post 2011, so census figures will not show this settlement)
Stroud 001C	Hardwicke (30% part of)		1525	60%	915	
Stroud 001A	Hardwicke (40% part of)		1822	87%	1585	
<i>Hardwicke total:</i>			= 4783	<i>Apply adjustment:</i>	= 3936	

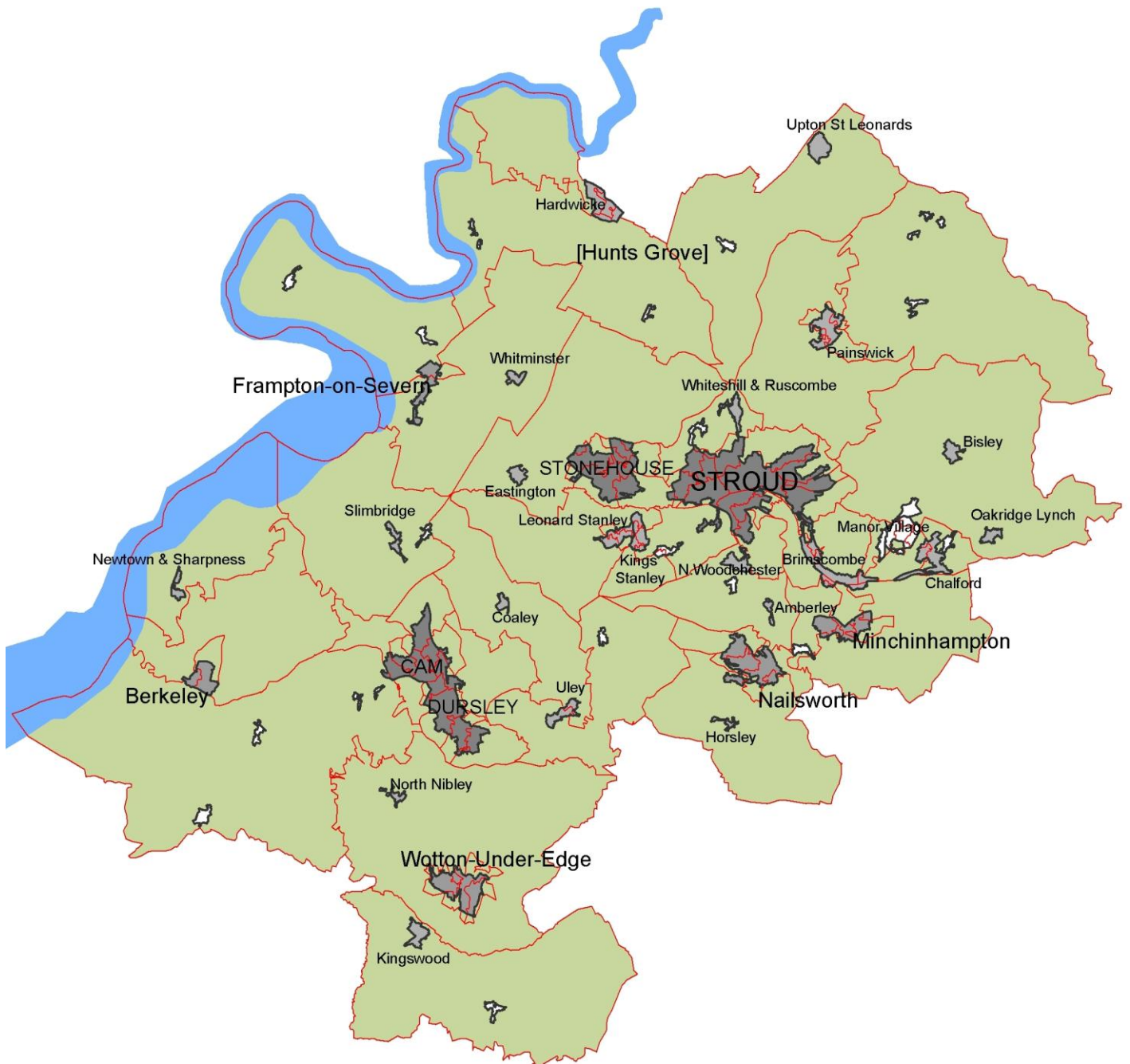
LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 013A	Horsley	400	1623	25%	= 406	This large LSOA has been apportioned between Horsley, Nailsworth and the extensive rural surroundings
Stroud 001C	Hunts Grove	n/a	1525	1%	= 15	This large LSOA is apportioned between Hunts Grove, Hardwicke, Haresfield/other small hamlets. Hunts Grove was developed post 2011, so census figures do not show it. This is a nominal %.
Stroud 009C	Kings Stanley (25% part of)	1,500	1424	33%	469	Three large and complex LSOAs, with a lot of mixing between Kings Stanley and Leonard Stanley. Individual totals have been apportioned between Leonard Stanley, Kings Stanley, Middleyard, Selsley and rural surroundings (including Frocester)
Stroud 009E	Kings Stanley (25% part of)		1327	35%	464	
Stroud 009D	Kings Stanley (50% part of)		1209	50%	604	
<i>Kings Stanley total:</i>			= 3960	<i>Apply adjustment:</i>	= 1539	
Stroud 015A	Kingswood	1,400	2096	66%	= 1383	LSOA apportioned between Kingswood, Hillesley and extensive rural surroundings including several small villages and hamlets
Stroud 009C	Leonard Stanley (50% part of)	1,400	1424	50%	712	Two large and complex LSOAs, with a lot of mixing between Kings Stanley and Leonard Stanley. Individual totals have been apportioned between the two settlements, plus rural surroundings (including Frocester)
Stroud 009E	Leonard Stanley (50% part of)		1327	55%	729	
<i>Leonard Stanley total:</i>			= 2751	<i>Apply adjustment:</i>	= 1441	
Stroud 002A	Manor Village (15% part of)	2,800	2142	5%	107	Manor Village is split across four LSOAs, including the very large and rural 002A. With the exception of 008D (which sits entirely within the settlement boundary), all include other settlements and numerous smaller hamlets and farmsteads. The totals for each LSOA have been split between Manor Village, Eastcombe, Bisley, Oakridge Lynch, Bussage, Chalford, France Lynch and rural surroundings.
Stroud 008A	Manor Village (15% part of)		1784	15%	267	
Stroud 008C	Manor Village (30% part of)		1396	54%	754	
Stroud 008D	Manor Village (50% part of)		1674	100%	1674	
<i>Manor Village total:</i>			= 6996	<i>Apply adjustment:</i>	= 2802	

LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 010B	Minchinhampton (30% part of)	3,450	1611	70%	1127	Totals apportioned between Minchinhampton, Box, Brimscombe and an extensive rural area (010D), including some small hamlets and farmsteads
Stroud 010C	Minchinhampton (30% part of)		1325	85%	1126	
Stroud 010D	Minchinhampton (40% part of)		1421	85%	1208	
<i>Minchinhampton total:</i>			= 4357	<i>Apply adjustment:</i>	= 3461	
Stroud 013A	Nailsworth	5,800	1623	50%	811	With the exception of 013A (which is apportioned between Nailsworth, Horley and an extensive rural area), these LSOAs sit quite tightly around settlement. Any surrounding hamlets effectively function as 'suburbs' of the town. Hence the LSOAs are apportioned entirely to Nailsworth.
Stroud 013B	Nailsworth		1630	100%	1630	
Stroud 013C	Nailsworth		1609	100%	1609	
Stroud 013D	Nailsworth		1752	100%	1752	
<i>Nailsworth total:</i>			= 6614	<i>Apply adjustment:</i>	= 5802	
Stroud 012A	Newtown and Sharpness	1,400	1412	100%	= 1412	012A is a large area, but it is quite sparsely populated apart from Newtown/Sharpness. The data for 012A is therefore apportioned entirely to the settlement.
Stroud 015B	North Nibley	570	1621	35%	= 567	This very large LSOA has been apportioned between N.Nibley and its rural surroundings, which include many small hamlets and farmsteads
Stroud 010A	North Woodchester	630	2116	30%	= 634	LSOA data apportioned between Amberley, Woodchester and other small settlements
Stroud 002A	Oakridge Lynch	530	2142	25%	= 535	LSOA total apportioned between Bisley, Oakridge Lynch, Manor Village, Eastcombe and extensive rural surroundings

LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 002B	Painswick (50% part of)	2,400	1202	100%	1202	002B is focussed quite tightly on the settlement of Painswick. 002C is a large and rural area, but includes no other defined settlements (although there are hamlets, including Pitchcombe).
Stroud 002C	Painswick (50% part of)		1425	85%	1211	
<i>Painswick total:</i>			2627	<i>Apply adjustment:</i>	= 2413	
Stroud 003D	Slimbridge	800	1136	70%	= 795	LSOA apportioned between Slimbridge and Cambridge
Stroud 006B	Stroud	11,100	2141	100%	2141	<p>Although two or three of these LSOAs include fairly significant areas of land beyond the main settlement boundary (e.g. 007A, 006D, 006C), any peripheral populated areas they contain do function as 'suburbs' of Stroud in most respects.</p> <p>Otherwise, the LSOA boundaries are quite tightly related to the settlement boundary and/or parish boundaries of Rodborough, Cainscross and Stroud.</p> <p>All 14 LSOAs have been apportioned to the Stroud settlement. However, the overall total is also broken down into three sub-area totals, to show up any clear functional differences between central Stroud, Rodborough and Cainscross.</p>
Stroud 006C	Stroud		2150	100%	2150	
Stroud 006D	Stroud		2215	100%	2215	
Stroud 006E	Stroud		2437	100%	2437	
Stroud 006A	Stroud		2150	100%	2150	
<i>Stroud (central) total:</i>			= 11093	<i>No adjustment:</i>	= 11093	
Stroud 004A	Stroud (Cainscross)	9,500	1675	100%	1675	
Stroud 004B	Stroud (Cainscross)		2274	100%	2274	
Stroud 004C	Stroud (Cainscross)		1771	100%	1771	
Stroud 004D	Stroud (Cainscross)		1596	100%	1596	
Stroud 004E	Stroud (Cainscross)		2166	100%	2166	
<i>Stroud (Cainscross) total:</i>			= 9482	<i>No adjustment:</i>	= 9482	
Stroud 007A	Stroud (Rodborough)	4,550	1464	100%	1464	
Stroud 007B	Stroud (Rodborough)		1555	100%	1555	
Stroud 007C	Stroud (Rodborough)		1524	100%	1524	
<i>Stroud (Rodborough) total:</i>			= 4543	<i>No adjustment:</i>	= 4543	
<i>Stroud (whole settlement) total:</i>			= 25118	TOTAL:	= 25118	

LSOA	Settlements (or parts of settlements included within each LSOA)	Estimated population of each settlement (rounded)	Total LSOA population (2011 census)	Adjustment: proportion of this LSOA's data to be attributed to this settlement	LSOA population multiplied by % adjustment = the settlement's estimated population	NOTES:
Stroud 005A	Stonehouse	7,700	1817	100%	1817	All five LSOAs apportioned entirely to Stonehouse: no other settlements are included in these areas, nor significant amounts of surrounding rural land. The few peripheral built up areas (e.g. Ryeford in 005E) in many respects function as 'suburbs' of the main settlement.
Stroud 005B	Stonehouse		1410	100%	1410	
Stroud 005C	Stonehouse		1579	100%	1579	
Stroud 005D	Stonehouse		1377	100%	1377	
Stroud 005E	Stonehouse		1542	100%	1542	
<i>Stonehouse total:</i>			= 7725	<i>No adjustment:</i>	= 7725	
Stroud 009A	Uley	1,130	1240	40%	496	These two LSOAs are split between Uley, Coaley and Nympsfield, plus an extensive rural area which includes Owlpen.
Stroud 009B	Uley		1059	60%	635	
<i>Uley total:</i>			= 2299	<i>Apply adjustment:</i>	= 1131	
Stroud 001D	Upton St Leonards	1,140	2845	40%	1138.00	This large and rural LSOA is apportioned between Upton, Brookthorpe and the surrounding rural area, which includes hamlets and part of "Coopers Edge" at Brockworth. (Coopers edge was developed from 2006: so any data from the 2001 census should be adjusted by 54%, rather than the 40% used here for 2011 census data)
Stroud 001D	(Coopers Edge/Brockworth)		2845	24%	682.80	
<i>Upton St Leonards total:</i>			= 2845	<i>Apply adjustment:</i>	= 1138	
Stroud 004F	Whiteshill and Ruscombe	1,150	1747	66%	= 1153	LSOA apportioned between Whiteshill&Ruscombe and Randwick
Stroud 003B	Whitminster	880	1711	52%	= 889	LSOA apportioned between Frampton, Whitminster and extensive rural surroundings (including Moreton Valence)
Stroud 015C	Wotton-Under-Edge	4,890	1453	100%	1453.00	These three LSOAs adhere quite closely to the Wotton settlement boundary, and any peripheral built up areas they contain do clearly function as part of the town.
Stroud 015D	Wotton-Under-Edge		1714	100%	1714.00	
Stroud 015E	Wotton-Under-Edge		1722	100%	1722.00	
<i>Wotton total:</i>			= 4889	<i>No adjustment:</i>	= 4889	

Settlements and Lower Super Output Areas (LSOAs):



- Settlements included in this study:**
 Settlements classified in tiers 1-3 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Settlements excluded from this study:**
 Small settlements classified in tiers 4 or 5 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Census Lower Super Output Areas (LSOA)**

APPENDIX 3:

Settlements included in each of the District's census Middle Super Output Areas (MSOAs).

Statistics for each settlement have generally been aggregated from figures relating to either 'Lower Super Output Areas' (LSOA) or 'Middle Super Output Areas' (MSOA).

- Output Areas (OAs): these are the smallest census output areas, with a minimum size of 100 residents and 40 households
- Lower Super Output Areas (LSOAs) are aggregations of OAs. They have a minimum size of 1,000 residents and 400 households
- **Middle Super Output Areas (MSOAs) are aggregations of LSOAs, with a minimum size of 5,000 residents and 2,000 households**

Because most MSOAs do not correspond exactly with individual settlement boundaries (they tend to cover more than one settlement and/or surrounding rural land), it is rarely possible to attribute figures precisely to specific settlements, but rather to more general geographic areas. **They must therefore be viewed as indicative, rather than factually exact.**

Some of the larger settlements are exceptions to this rule, though: the MSOA boundaries around **Stroud, Stonehouse, Cam** and **Dursley** correspond quite closely to their settlement boundaries. Therefore the data can reliably be attributed to these settlements, without the need to adjust or estimate.

The following table lists all the defined settlements that appear within each of the District's 15 MSOAs. The settlements **coloured light grey** are lower tier settlements, which have not been included in this study. In the case of **Brimscombe, Manor Village** and **Stroud**, the settlement boundary is split across two or more Middle Super Output Areas.

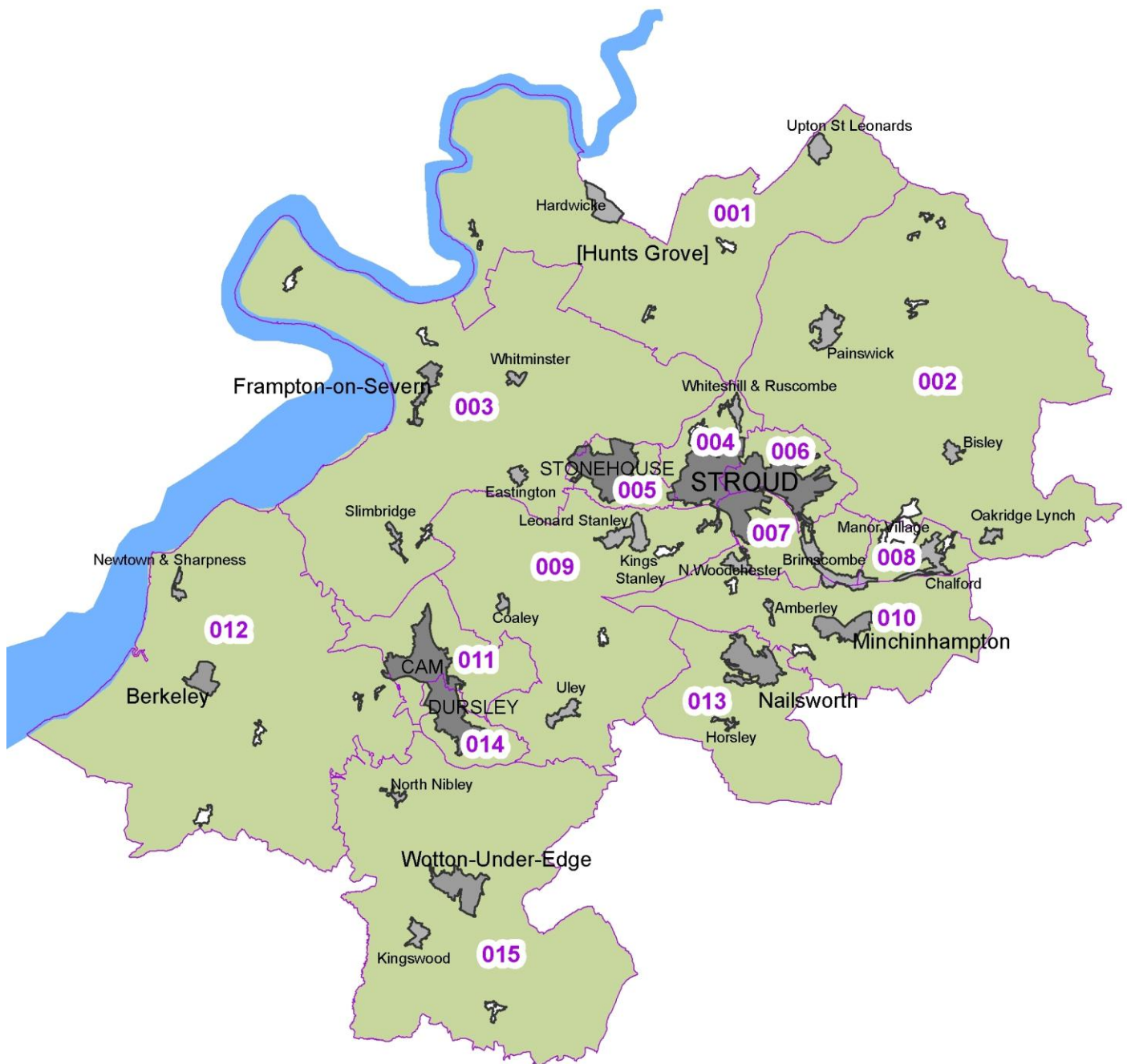
Which settlements sit within each Middle Super Output Area (MSOA)?	Lower Super Output Areas contained within each MSOA, and the settlement(s) they cover:	
MSOA 001		
Hardwicke, Upton St Leonards and emerging Hunts Grove (plus the lower tier settlements of Brookthorpe, Haresfield and Longney & Epney) (also the recent development at Brockworth, which is not a defined settlement)	Stroud 001A	Hardwicke
	Stroud 001B	
	Stroud 001C	
	Stroud 001C	Hunts Grove
	Stroud 001C	Longney & Epney
	Stroud 001C	Haresfield
	Stroud 001D	Upton St Leonards
Stroud 001D	Brookthorpe	

Which settlements sit within each Middle Super Output Area (MSOA)?	Lower Super Output Areas contained within each MSOA, and the settlement(s) they cover:	
MSOA 002		
Bisley, Painswick, Oakridge Lynch and a small part of Manor Village (see also MSOA 008) (plus the lower tier settlements of Cranham, Eastcombe and Sheepscombe)	Stroud 002A	Bisley
	Stroud 002A	Oakridge Lynch
	Stroud 002A	Manor Village (15% part of)
	Stroud 002A	Eastcombe
	Stroud 002B	Painswick
	Stroud 002C	
	Stroud 002D	Sheepscombe
	Stroud 002D	Cranham
MSOA 003		
Eastington, Frampton on Severn, Slimbridge, Whitminster (plus the lower tier settlements of Arlingham, Saul and Cambridge)	Stroud 003A	Eastington
	Stroud 003B	Whitminster
	Stroud 003B	Frampton on Severn
	Stroud 003C	
	Stroud 003C	Arlingham
	Stroud 003C	Saul
	Stroud 003D	Slimbridge
	Stroud 003D	Cambridge
MSOA 004		
Stroud (Cainscross) (see also MSOAs 007 and 008), Whiteshill & Ruscombe (plus the lower tier settlement of Randwick)	Stroud 004A	Stroud (Cainscross, Ebley, Dudbridge, Paganhill, Cashes Green) Whiteshill and Ruscombe Randwick
	Stroud 004B	
	Stroud 004C	
	Stroud 004C	
	Stroud 004D	
	Stroud 004E	
	Stroud 004F	
	Stroud 004F	
MSOA 005		
Stonehouse	Stroud 005A	Stonehouse
	Stroud 005B	
	Stroud 005C	
	Stroud 005D	
	Stroud 005E	
MSOA 006		
Stroud (central) (see also MSOAs 004 and 007)	Stroud 006A	Stroud
	Stroud 006B	
	Stroud 006C	
	Stroud 006D	
	Stroud 006E	

Which settlements sit within each Middle Super Output Area (MSOA)?	Lower Super Output Areas contained within each MSOA, and the settlement(s) they cover:	
MSOA 007		
Stroud (Rodborough) and most of Brimscombe (see also MSOAs 008 and 010)	Stroud 007A	Stroud (Rodborough)
	Stroud 007B	
	Stroud 007C	
	Stroud 007D	Brimscombe (20% part of)
	Stroud 007E	Brimscombe (50% part of)
MSOA 008		
Chalford , most of Manor Village (see also MSOA 002), a small part of Brimscombe (see also MSOAs 007 and 010) (plus the lower tier settlements of France Lynch and Bussage)	Stroud 008A	Chalford
	Stroud 008A	Manor Village (15% part of)
	Stroud 008B	Chalford
	Stroud 008B	France Lynch
	Stroud 008C	Manor Village (30% part of)
	Stroud 008C	Brimscombe (10% part of)
	Stroud 008C	Bussage
	Stroud 008D	Manor Village (50% part of)
MSOA 009		
Leonard Stanley, Kings Stanley, Uley, Coaley (plus the lower tier settlements of Nympsfield, Middleyard and Selsley)	Stroud 009A	Coaley
	Stroud 009A	Uley
	Stroud 009B	
	Stroud 009B	Nympsfield
	Stroud 009C	Kings Stanley (25% part of)
	Stroud 009C	Middleyard (50% part of)
	Stroud 009C	Leonard Stanley (50% part of)
	Stroud 009D	Kings Stanley (50% part of)
	Stroud 009D	Middleyard (50% part of)
	Stroud 009D	Selsley
	Stroud 009E	Kings Stanley (25% part of)
	Stroud 009E	Leonard Stanley (50% part of)
MSOA 010		
Minchinhampton, Brimscombe, North Woodchester, Amberley (plus the lower tier settlements of Box, South Woodchester)	Stroud 010A	North Woodchester
	Stroud 010A	South Woodchester
	Stroud 010A	Amberley
	Stroud 010B	Minchinhampton (30% part of)
	Stroud 010B	Box
	Stroud 010B	Brimscombe (5% part of)
	Stroud 010C	Minchinhampton (30% part of)
	Stroud 010C	Brimscombe (5% part of)
	Stroud 010D	Minchinhampton (40% part of)
	Stroud 010D	Brimscombe (10% part of)

Which settlements sit within each Middle Super Output Area (MSOA)?	Lower Super Output Areas contained within each MSOA, and the settlement(s) they cover:	
MSOA 011		
Cam	Stroud 011A	Cam
	Stroud 011B	
	Stroud 011C	
	Stroud 011D	
	Stroud 011E	
	Stroud 011F	
MSOA 012		
Berkeley and Newtown & Sharpness (plus the lower tier settlements of Newport, Stone and Stinchcombe)	Stroud 012A	Newtown and Sharpness
	Stroud 012B	Berkeley
	Stroud 012C	Berkeley
	Stroud 012D	Newport
	Stroud 012D	Stone
	Stroud 012D	Stinchcombe
MSOA 013		
Nailsworth and Horsley	Stroud 013A	Horsley
	Stroud 013A	Nailsworth
	Stroud 013B	
	Stroud 013C	
	Stroud 013D	
MSOA 014		
Dursley	Stroud 014A	Dursley
	Stroud 014B	
	Stroud 014C	
	Stroud 014D	
MSOA 015		
Wotton Under Edge, Kingswood and North Nibley (plus the lower tier settlement of Hillesley)	Stroud 015A	Kingswood
	Stroud 015A	Hillesley
	Stroud 015B	North Nibley
	Stroud 015C	Wotton
	Stroud 015D	
	Stroud 015E	

Settlements and Middle Super Output Areas (MSOAs):



- Settlements included in this study:**
 Settlements classified in tiers 1-3 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Settlements excluded from this study:**
 Small settlements classified in tiers 4 or 5 of the Stroud District settlement hierarchy (Local Plan policy CP3).

- Census Middle Super Output Areas (MSOA)**

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