



COTSWOLD
DISTRICT COUNCIL

Green Economic Growth Strategy

Consultation Draft October 2020



Introduction

Economic development is at a crossroads in the Cotswold District - we can sit back and let others decide our future or take destiny into our own hands and promote a living growing exciting economy based on community-based commercialism; the greatest green growth revolution ever and real attraction for high net worth companies looking to relocate away from cities in a new digital world.

Important though it is, Cotswold District is about more than the visitor economy. We have many companies who are at the cutting edge of innovation and we want to encourage more. There are opportunities to grow sectors such as agritech, cyber/digital, medical equipment and environmental technologies, by building on the strengths we already have in these areas.

Cotswold District Council's role will be varied in responding to the economic challenges we face. As a local authority we cannot deliver everything ourselves. At times we will be delivering projects directly. We will often be working in partnership with others. We will frequently be lobbying other partners to secure the best outcome for the District and we will be celebrating the successes we have achieved together. Cotswold District Council may not be "taking all the actions" but we will be "actors" not audience and we will be engaging, encouraging and enabling members of our communities who want to take a lead or be a part of delivering a sustainable economy.

We will stimulate local green investment. The Recovery Investment Strategy makes clear our willingness to support local investment that brings returns for our residents and great infrastructure the Cotswolds has been crying out for - homes for young people, green energy and transport and sustainable valuable commerce.

Our climate change and ecological obligations must be at the heart of everything we do, which is why our focus is on creating high value, high skill, low environmental impact jobs and why we will support investment into projects that directly deliver climate change mitigation and adaptation. We can choose to train our young people in new digital age skills - apps, games, cyber technologies, and agri-tech - rather than settle for the low skill, low paid jobs of the past. Our local big businesses have a role to play - promoting attractiveness, employing young apprentices and extending their supply chains locally.

We want to see healthy high streets with resilient local retailers selling high quality locally sourced products. We want to help all our businesses become green, save money on energy bills, and engage with a new digital and on-line revolution - so that they create fabulous customer experiences in the Cotswolds AND around the world. We want our young people to have the skills to apply for and succeed in great digital jobs as web leaders, ecommerce champions, start up entrepreneurs and digital designers - selling around the world. We want our residents to enjoy a prosperous economy where they can work from home, work locally and spend locally whilst enjoying a high quality of life, in a way which is inclusive and promotes equality and well-being.

This document is, by its nature, a dynamic one which will evolve as the economic circumstances change and our response to them is adapted accordingly.

Councillor Tony Dale

Cabinet Member for Economy & Skills, Cotswold District Council

Vision

Our ambition is to nurture a dynamic, vibrant and balanced economy in the Cotswold District, growing high value, highly-skilled, low environmental impact businesses in our district. We will be a business-friendly council, not just communicating regularly with our local business community, working with them to grow the district's economy and enhancing the opportunities available for local people, particularly young people. We want our communities to engage in building a sustainable, inclusive economy which promotes health and wellbeing.

Much of our work in this area will be done in partnership with key stakeholders ranging from the County Council, GFirst LEP, Chambers of Commerce and other business groups, Town and Parish Councils, institutions like the Royal Agricultural University and Cirencester College and individual businesses large and small. Building these relationships and working together effectively will be key to the delivery of our Green Economic Growth Strategy.

Executive Summary

The cabinet of Cotswold District Council is very clear: it wishes to lead on economic development, partnering our successful local businesses, and has a vision of a dynamic, vibrant and balanced economy in the Cotswolds, growing high value, highly-skilled, low environmental impact commerce in our District.

The Cotswolds, a wider area than just the Cotswold District, is well-known as a popular visitor destination and the visitor economy accounts for a significant proportion of the local economy - 7000 jobs or 18% of the total. However, the Cotswold District economy is about so much more than that. We have many companies at the cutting edge of innovation and the opportunity to grow key sectors like agritech, cyber and digital, medical equipment and environmental technologies to name a few.

The Council's role will be varied - at times we will be delivering projects or investing in them directly, in other situations we will be working with partners and on occasions our role will simply be to promote what others are doing. However, we are clear that we will be actors not audience. Having declared both a climate emergency and an ecological emergency, we will ensure these objectives run through everything we do.

Cotswold District is spread out geographically, covering an area of 450 square miles. Cirencester is by far the biggest settlement, with Moreton-in-Marsh seen as the centre for the north Cotswolds and other towns performing a linking function. The District has some key assets like the Cotswold Water Park, Cotswold Airport, Royal Agricultural University, RAF Fairford, the Fire Service College and the Campden BRI Food Innovation Centre. However, almost 90% of our businesses are microbusinesses with 9 or fewer employees - over 5500 of them. The District has a slightly older than average age profile and double the national average of people working from home. Median house prices are 13.5 times gross median earnings (ONS data) - the highest in the county - which can make it difficult for young people to get on the housing ladder and for some companies to recruit.

This Strategy has been written to align with the Gloucestershire Draft Local Industrial Strategy and the Council's own Corporate Strategy. It is also informed by the Cotswold District Local Plan, which was adopted in 2018 and is undergoing a review.

The District Council's efforts in recent months have been dominated by its response to the Coronavirus pandemic. £36.5 million of Government grant has been paid out to over 2000 businesses and 1200 have benefitted from business rate relief. The District Council worked to safely reopen its town centres and later to support the hospitality sector to reopen when lockdown restrictions were eased further. Cotswold Tourism supported businesses with free membership. Having moved through the pre-recovery and recovery phases, the District Council is now focused on transformation, set out in this strategy, to create resilience for future waves of uncertainty.

There are opportunities to grow the Agritech and Food & Drink sectors, building on the strengths the District has with the Royal Agricultural University and the Farm 491 Incubator in Cirencester and the Campden BRI Food Innovation Centre at Chipping Campden. The RAU's Triangle/University Gate site could be brought forward for this purpose.

Cyber is a leading growth sector for the County, with Cheltenham taking the lead but with the scale of the growth there are opportunities for other parts of the County including Cotswold District. There may be an opportunity for a cyber facility at the Fire Service College in Moreton and the wider digital sector can build on already existing roots, particularly in Cirencester.

The green revolution offers opportunities for the District including in delivering Zero and Low Carbon Homes, renewable energy, retrofitting energy efficiency measures to homes and sustainable transport.

Our Town Centres are changing and this evolution has been accelerated by the Coronavirus pandemic and lockdown. We will assist our towns to respond to this. We already have a project underway with tech company Maybe* to assist the resilience of businesses by improving their digital and social media presence. We will complete the Cirencester town centre masterplan, identifying opportunities for the Council to invest in regeneration. The masterplan will provide a template for other towns to use should they wish to do so.

The Visitor Economy also needs to evolve, to be more geographically spread out, to be an all-year-round destination, to convert day visits to overnight stays and to link better with local industry such as food & drink.

Improving infrastructure is vital too - both transport and digital. The A417 Missing Link is by far the biggest piece of transport infrastructure planned for the County in the coming years. Linking Gloucester to Cirencester, it has the potential to make the District an even more attractive place for business by removing the congestion that exists at certain times of the day. The investment of around £450 million also gives opportunities for local suppliers and contractors and for jobs and apprenticeships. It could also open up limited development opportunities along the route. There are a number of other smaller infrastructure projects identified in the District and the Council is commissioning a Sustainable Transport Strategy.

Significant progress has been made, with the help of the Fastershire project, to improve broadband connectivity in the District. Cotswold District now has 95.3% of homes with Superfast broadband and 40.1% with Ultrafast broadband, making it the best connected rural area in the country.

Openreach have announced that Cirencester will be full fibre by 2025. However, there are still some areas where broadband is poor and even superfast connectivity is not sufficient for some businesses to operate in the way they would wish to.

Mobile phone coverage too is largely good for most networks in most places, but there are ‘not-spots’ in some areas which we wish to see addressed and will engage with the mobile phone network operators to do so.

With unemployment looking set to rise significantly, and disproportionately amongst 16-24 year-olds, it is more vital than ever that we ensure the training and skills offer is easy to access and meets the needs of employers. We will work with partners to ensure the offer is joined up and coherent. The award of £4.48 million to Cirencester College for its new Applied Digital Skills Centre is particularly exciting.

The District Council will use its new Economic Development resource to ensure it is proactive in communicating with and supporting existing businesses and in attracting new businesses to the District, matching them up with available sites and premises.

Housing Growth too will play its part in the recovery, with sites like The Steadings starting to come forward, delivering much-needed housing for our younger families and new generation.

The District Council has also been clear that it wishes to see the local economy grow in a way that benefits people across the District. As a whole, the District is relatively prosperous but it also has some of its Lower Super Output Areas (LSOAs) in the bottom 10% of the Index of Multiple Deprivation for the County. The Council will seek to address this by working with partners, particularly the voluntary sector, by including social value requirements in council contracts and working to close the ‘digital divide’ amongst our population.

We know we cannot achieve the objectives of this strategy on our own. We will need to work with key partners like Gloucestershire County Council, GFirst Local Enterprise Partnership, Town Councils, Chambers of Commerce, the voluntary sector and businesses large and small.

We will agree indicators to monitor the success of the strategy and the strength of the local economy. Some suggestions are set out at the end of this document and we will invite others as part of the consultation on the strategy.

Updates on progress against the strategy will be presented to the Council’s Cabinet on a regular basis.

Where we are now

A Portrait of the District

Cotswold District has a population of 89,862 as of 2019. 18.5% are aged 0-17, 55.7% between 18-64 years and 25.9% are aged over 65, giving it a slightly older than average profile than the national average.

The District is spread over an area of 450 sq. miles (1,165 sq km). Although very rural, the District lies in close proximity to large urban areas – notably Swindon, Gloucester, Cheltenham, Oxford, and, slightly further afield, Bristol, Bath, Birmingham and Reading, all having good access by road and rail. The Cotswolds, as a wider area, is internationally renowned for its natural beauty and magnificent historic buildings and settlements.

Cirencester is by far the most dominant centre with about a quarter of the District's population (around 20,000) and over 30% of the jobs (around 13,500) based in the town. This is the key location for business services, finance, retail and public services such as health, education, local government and the Police. Moreton-in-Marsh is the main centre for the North Cotswolds, with Bourton-on-the-Water, Chipping Campden, Fairford, Lechlade, Northleach, Stow-on-the-Wold and Tetbury serving the surrounding rural areas.

The District supports an economically active population of 47,700 and has strengths in Finance and Business Services, ICT including Science and Technology, Retail, and Accommodation and Food Services. Notable employers include St James's Place, The Colt Car Co, Campden BRI, Royal Agricultural University and Fire Service College. In 2015, the District had a marginally higher representation of smaller enterprises: 89% are micro businesses employing less than 10 people, 9% are small businesses with between 10 and 29 employees, 65 enterprises have between 50-249 employees and 15 enterprises have over 250 employees.

However, there are pockets of deprivation and median wages for people working in the District are below the national average. Affordability of housing is a significant issue for the District, as a result businesses can face skill and labour shortages. There is a 19% gap in the employment rate between those with a long-term health condition and overall employment rate, which is the highest rate in the county. The District also performs poorly in terms of social mobility.

The 2011 Census shows that the District is relatively well self-contained although it is a net importer of labour of under 2,000 people from predominantly adjoining districts including Swindon, Wychavon and Stroud.

With a highly skilled population and key business assets, Cotswold offers a unique business location with a high quality of life within an internationally recognised outstanding natural environment and built heritage assets.

Cotswold District has double the national average of people working from home - at 8,000 people and 13.3%, it is the 7th highest figure in England. This is due to the rural nature of the district, making it an attractive place to work, and a highly-skilled and entrepreneurial workforce.

Economic Baseline

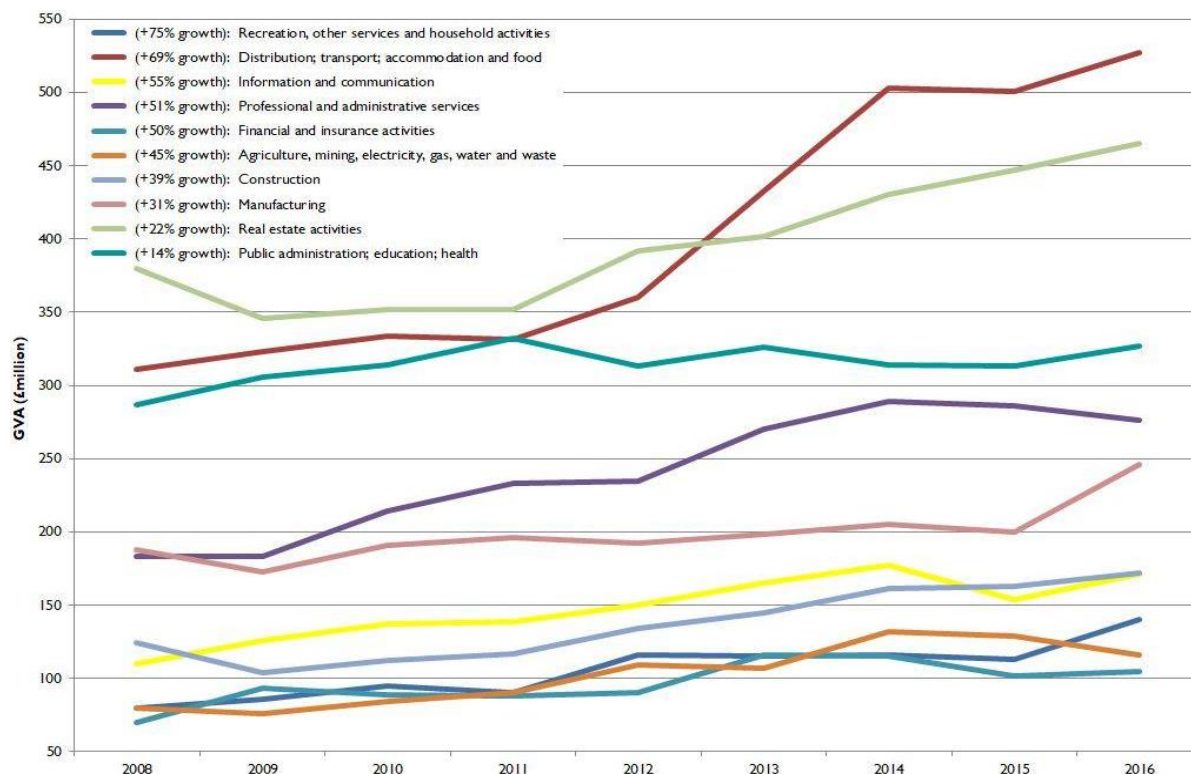
Cotswold District has an annual GVA of just over £3.5 billion. The sectors with the largest GVAs are Financial and insurance services (£931 million); Wholesale, retail and motor trades (£544 million); and Real estate (£485 million).

Composition of Employment by Local Authority by Sector – Top Sectors

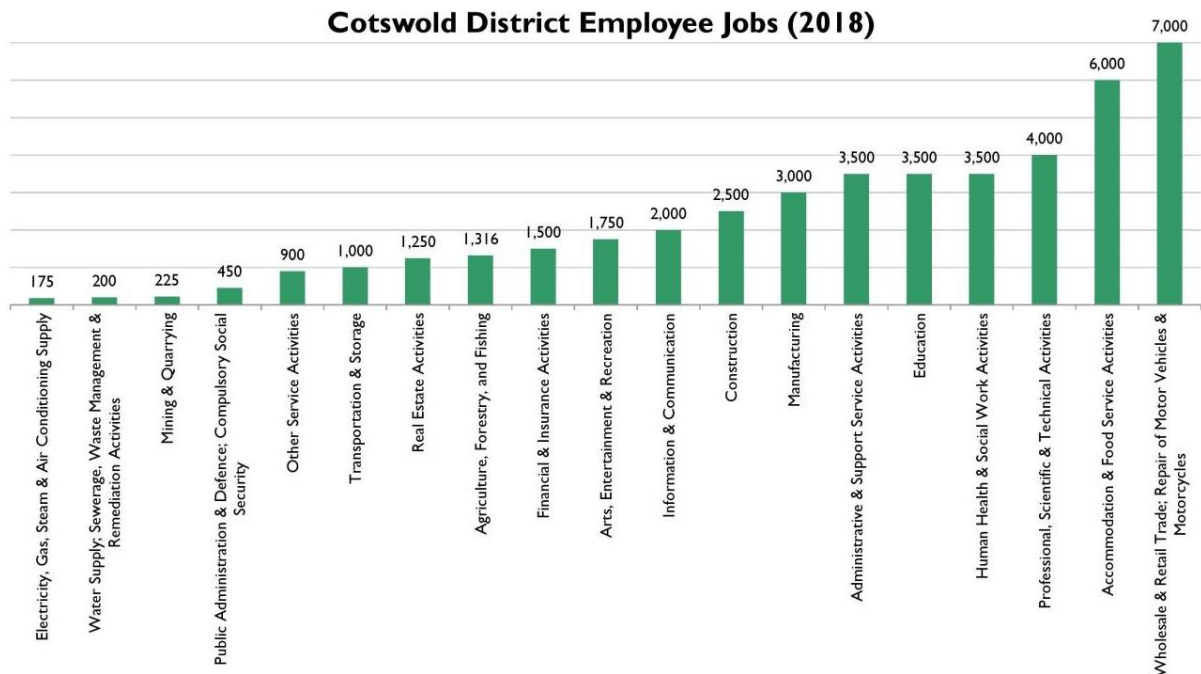
	Gloucestershire	Cheltenham	Cotswolds	Forrest of Dean	Gloucester	Stroud	Tewkesbury	South West	England and Wales
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	15.2%	16.4%	15.9%	12.5%	15.9%	14.3%	13.0%	15.8%	15.3%
Q : Human health and social work activities	14.2%	16.4%	8.0%	14.6%	20.6%	12.2%	10.9%	14.8%	12.9%
C : Manufacturing	11.8%	6.6%	6.8%	16.7%	6.3%	18.4%	21.7%	8.5%	8.2%
I : Accommodation and food service activities	9.0%	9.8%	13.6%	7.3%	6.3%	9.2%	6.5%	9.7%	7.5%
P : Education	8.3%	9.8%	8.0%	10.4%	7.1%	9.2%	5.4%	8.7%	8.9%
M : Professional, scientific and technical activities	7.3%	8.2%	9.1%	5.2%	4.8%	6.1%	9.8%	7.2%	8.8%
N : Administrative and support service activities	6.9%	7.4%	8.0%	5.2%	7.9%	4.6%	6.5%	6.6%	9.1%
F : Construction	5.5%	4.1%	5.7%	6.3%	4.0%	7.1%	7.6%	5.3%	4.6%
J : Information and communication	4.2%	5.7%	4.5%	2.5%	3.6%	3.6%	3.8%	3.4%	4.3%
H : Transportation and storage	3.1%	1.5%	2.3%	5.2%	3.2%	3.1%	4.3%	3.9%	4.8%

Source: Gloucestershire Economic Needs Assessment – DLP Consulting

The District’s key growth sectors between 2008 and 2016 have been Recreation, other services and household activities (+75% growth); Distribution; transport; accommodation and food (+69% growth); and Information and communication (+55% growth).



Cotswold District has 32,800 employees and an additional 9,500 self-employed workers¹. Around 28,000 are full-time and 15,000 are part-time². ‘Accommodation & food service’ and ‘Wholesale, retail & trade’ are the District’s two largest job groups, both of which are significantly affected by Covid-19.



Source: Business Register and Employment Survey (2018)

Note: The figure for Agriculture, Forestry and Fishing is unavailable for 2018, so the figure for the 2011 Census has been used for this category

Location Quotient Analysis Relative to England

	Cotswold	Gloucestershire
Agriculture, forestry and fishing	4.0	1.8
Mining and quarrying	6.3	1.3
Manufacturing	0.8	1.5
Electricity, gas and steam	0.8	1.9
Water supply, sewerage, waste	0.7	0.9
Construction	1.3	1.2
Wholesale and retail trade	1.1	1.0

¹ ONS annual population survey, Employment and unemployment (Oct 2018-Sep 2019)

² Source: ONS Business Register and Employment Survey (Note: Employee jobs excludes self-employed, government-supported trainees and HM Forces, as well as farm-based agriculture)

Transportation and storage	0.4	0.6
Accommodation and food service	2.0	1.2
Information and communication	1.0	0.9
Financial and insurance activities	0.9	0.9
Real estate activities	1.4	0.9
Professional, scientific and technical	0.9	0.8
Administrative and support service	0.8	0.7
Public administration and defence	0.2	1.1
Education	0.9	0.9
Human health and social work	0.6	1.1
Arts, entertainment and recreation	1.5	1.1
Other service activities	1.0	1.0

Source: Gloucestershire Economic Needs Assessment – DLP Consulting

Location Quotients (LQ) analyse the specialisms within the local economy. These describe the proportion of employment in a sector relative to a wider area (in this case England). A location quotient of 1 means there is the same level/concentration of employment in this sector as is the case across the rest of the country. A LQ above 1 means there is a high concentration of employment in that sector within the local economy compared to England as a whole.

Cotswold has particular specialisms in Mining and quarrying (6.3); Agriculture, forestry and fishing (4.0); Accommodation and food service (2.0); Arts, entertainment and recreation (1.5); Real estate activities (1.4); and Construction (1.3).

	Cotswold (Numbers)	Cotswold (%)	South West (Numbers)	South West (%)
Enterprises				
Micro (0 To 9)	5,540	89.5	208,865	89.1
Small (10 To 49)	555	9	21,240	9.1
Medium (50 To 249)	80	1.3	3,525	1.5
Large (250+)	15	0.2	790	0.3
Total	6,190	-	234,420	-
Local Units				
Micro (0 To 9)	5,980	86.5	232,205	84.1
Small (10 To 49)	800	11.6	36,220	13.1
Medium (50 To 249)	120	1.7	6,845	2.5
Large (250+)	10	0.1	900	0.3
Total	6,915	-	276,170	-

The District has 6,190 businesses. There is an above average number of micros businesses (89.5%) and lower than average proportions of medium (1.3%) and large (0.2%) businesses that operate across 6,915 individual sites (for example a factory or shop).

The Gloucestershire Economic Needs Assessment (2020) notes that the Cotswold market is quite scattered due to the rural nature and large size of the district.

Commercial interest is focussed around Cirencester and South Cerney. These areas form a very different market to the other Gloucestershire districts, which generally focus on the M5 corridor. While the A417 provides a direct link between these areas, the topography and the 'missing link' of non-dual carriageway on the A417, which can experience traffic delays, mean Cirencester and South Cerney are considered to be distinct to the M5 corridor by most potential occupiers.

Conversely, agents reported that Cirencester and South Cerney benefit from strong links to the south and east with access to Swindon and the M4 corridor providing a different market dynamic to the rest of Gloucestershire. Some also mentioned commuter links further east to Reading and London.

There is a definite demand for industrial space along the A417/A419 corridor, due to the highly skilled local workforce and high-tech manufacturing cluster around Cirencester. However, there is a lack of available serviced land with good access to the A417/A419 dual carriageway.

The north of Cotswold District is predominantly rural and has similarities with the market in the east of Tewkesbury District and Evesham. This area is beyond the areas of search focussed around Cheltenham, Gloucester, and the M5 corridor or Cirencester/South Cerney. Demand in the north of Cotswold District is predominantly for expansion for local businesses.

Cotswold District has received a significant quantum of conversions of former agricultural buildings to B Class employment uses. In the four-year period between 2015 and 2019, agricultural conversions accounted for 9,700 sqm of new employment floorspace – split fairly equally between B1a office, B1c workshop, and B2 general industrial uses.

Median house prices are 13.5 times median gross annual workplace-based earnings, which is by far the highest ratio of any of the surrounding districts. As a result businesses face skill and labour shortages. However, with a highly skilled population and key business assets, Cotswold can also offer a unique business location with a high quality of life within an internationally recognised outstanding natural environment that has many built heritage assets.

The threats to economic output include the District's limited offer in terms of large modern office space, and move-on space for growing SMEs; the loss of employment land to residential; housing and other locational costs with lower than average resident and work incomes; commercial vacancy rates and attractiveness to graduates and young workers.

Cotswold District's rural economy comprises many different types of small and micro-enterprises, and farm diversifications were highlighted as necessary to support that.

Small farm based enterprises, as part of parent farm businesses or housed in let business units, provide diversified income to farm and estate businesses enabling them to maintain profitability and thereby to invest in landscape and biodiversity management. This then attracts wider business investment and talent to the county and underpins its visitor economy and retention of young people.

National and Local Policy Context

Building a Britain Fit for the Future - National Industrial Strategy

In November 2017 the government published 'Building a Britain fit for the future' which set out the overarching industrial strategy for the UK. The first part of the strategy included a series of policies which impact on all sectors of the economy titled the 'Five Foundations'. These are considered the "essential attributes" for a successful economy and include:

- Ideas (R&D, innovation)
- People (skills and education)
- Infrastructure (broadband, energy, transport)
- Business environment (support for specific sectors and SMEs)
- Places (Local Industrial Strategies)

A key commitment made through the National Industrial Strategy is for the total Research & Development expenditure to increase. The Industrial Strategy Challenge Fund is a "core pillar" of this commitment and includes a £4.7 billion commitment to businesses seeking funds to research and develop technology or processes related to the aims of the industrial strategy.

The report details a series of partnerships with individual sectors and the government including the 'Sector Deals'. These Sector Deals include a bespoke arrangement between the government and industry with each involving three main elements:

1. An industry council to facilitate discussions between industry leaders, government officials and Ministers, and leading academics.
2. Access to a competitively awarded fund for R&D in the sector.
3. Policies to support the development of the skills needed in the sector.

To date a range of Sector Deals have been announced covering the follow key areas:

Aerospace, Artificial Intelligence, Automotive, Construction, Creative industries, Life sciences, Nuclear, Offshore wind, Rail, Tourism.

Gloucestershire Local Industrial Strategy

The Draft Gloucestershire Local Industrial Strategy (LIS) published in September 2019 aligns with the Government's national industrial strategy with its five foundations of Ideas, People, Infrastructure, Business Environment and Places and its four Grand Challenges:

- Artificial Intelligence and Data
- Ageing Society
- Clean Growth
- Future of Mobility

The strategy notes that "Technological change will have a huge impact on everyone's lives and livelihoods over the next few decades - indeed it has already started. Many types of jobs will disappear - others will be created. But we are yet to see whether policy and the public will keep up

with the pace of change effectively. It is on all of us to get out in front of it and proactively skill-up and inform ourselves to be ready.”

Gloucestershire has a desire to be a “magnet county... ensuring that the environment, the arts, heritage and culture, creativity and active living are central to our vision of a healthy, productive county that attracts and retains young talent and supports its residents to live life to the full.”

The Draft LIS identifies Cyber-tech, Agritech and the Green Economy as growth sectors, describing Gloucestershire as the “natural home for cyber-tech innovation” and the ambition to “create a healthy circular economy in food and farming” and to be “the Greenest place to live and work in England.”

The strategy also describes the ambition to be “the most flexible place to work” and “to become a pilot area for innovative technology-driven transport solutions that work in rural areas” and to have “high quality digital infrastructure”. In addition, it refers to potential “Tourism Zone status” and to being an “innovation active county.”

Gloucestershire Vision 2050

Vision 2050 was overseen by Leadership Gloucestershire, and is described as “a county-wide conversation to explore ideas and shape our long-term future together”. A consultation exercise ran from 1 February to 31 July 2018, generating around 2500 responses.

The Vision is made up of eight ambitions - a magnet county, an innovative county, a skilled county, a prosperous county, an inclusive county, a healthy and happy county and a connected county. There are six big ideas, two of which relate directly to Cotswold - an expansion and enhancement of Cotswold Airport and a 1,000 bed hotel at Cotswold Water Park. These ideas have not been progressed further and may well not be the right ones for the District, but they do highlight the need to think big and outside the box.

Western Gateway

The Western Gateway is a strategic partnership, much like the Northern Powerhouse and the Midlands Engine, which is aimed at promoting and maximising economic growth from Swansea to Swindon. Its strapline is “Propelling a greener, fairer, stronger Britain”.

The area has a population of 4.4 million, an economy of £107 billion, 156,000 businesses and 10 universities. It is chaired by Katherine Bennett, Senior Vice President of Airbus, one of the region’s largest employers.

It was launched in November 2019 by the then Welsh Secretary Alun Cairns who said, “The region can be a true powerhouse of the UK economy”. Local Government Secretary Robert Jenrick added that the region was a major centre for cyber and tech, research, manufacturing and the creative industries and that it would give South West England a powerful voice.”

The prospectus states that delivering the vision could add more than £56 billion to the UK economy by 2030. It sets out three ambitions - Connectivity (transport and digital); Global Gateway (trade); and Innovation (energy, research, digital and cyber).

It is not yet clear what impact the initiative will have and how this will affect Cotswold District, but it is hoped that the region will have sufficient critical mass to attract the attention of Government in the same way its Northern and Midlands counterparts have.

Cotswold District Local Plan 2011-2031

The Cotswold District Local Plan was adopted in August 2018. Policy DSI covers the overarching Local Plan Strategy which includes provision for sufficient land to be allocated, which together with commitments and dwellings completed since 2011, will deliver at least 8,400 dwellings and at least 24 ha for B class employment use over the Plan period (2011-2031). These will primarily be delivered within the Council's 17 Principal Settlements.

The Local Plan provides a positive policy context in relation to safeguarding employment sites, promoting development at the three Special Policy Areas and supports rural diversification.

The Plan is currently subject to review and the Administration has made clear their ambition to make the Local Plan "Green to the Core."

Cotswold District Council Economy and Employment Land Update (April 2016)

This report forms part of the evidence base for policies and proposals in the Cotswold District Local Plan Submission Draft, but to some extent is superseded by the Gloucestershire Economic Needs Assessment.

It recommended that the District should avoid over-allocating employment land given the pressure for change of use to residential and non-employment generating uses, noting that a safeguarding policy is critical to protect existing sites to offer space for new and indigenous businesses to grow. It added that the economic policy and employment land response in the Local Plan needs to reflect a growing and dynamic economy, particularly recognising the need to support self-employed workers. Policies for Superfast Broadband are critical in supporting effective home working and self-employment.

Cotswold Business Delivery Plan (August 2017)

This report sets out the key priorities for Cotswold District Council in order to proactively meet the need of business, support competitive town centres, a prosperous rural economy and deliver the spatial economic strategy specified in the Cotswold Local Plan.

Threats to economic output include Cotswold District's limited offer in terms of large modern office space, and move-on space for growing SMEs; the loss of employment land to residential; Housing and other locational costs with lower than average resident and work incomes; commercial vacancy rates and attractiveness to graduates and young workers.

Climate Change Strategy

The District Council declared a Climate Emergency on 3 July 2019 and an Ecological Emergency on 15 July 2020.

Minimising, and adapting to, the forthcoming effects of climate change is a priority for everyone. The science is settled (climate heating is man-made; net greenhouse gas emissions must be cut to zero and then reversed), and all major international agencies agree that climate change, and the linked biodiversity / nature crisis, is the biggest threat to all our future livelihoods.

These crises, and the strength and effectiveness of our collective response to them, is the defining context of the next few decades, and indeed much further into the future. Whilst the crises are universal and global, action to tackle them will be local. It is for this reason that Cotswold District Council has adopted tackling the climate crisis as one of its highest strategic priorities.

However, tackling the climate crisis is not a discrete activity. By its nature the climate crisis will, increasingly, impact every aspect of the lives of Cotswold residents, and every aspect of the work of the Council. Equally, our responses to the climate crisis do not constitute a single policy area, but must be enacted through every aspect of the Council's work.

The success of climate change mitigation will play out over the medium term, but ultimately all residents of the district will benefit from a more liveable climate. In a shorter timeframe there will be challenges but also employment and investment benefits, as well as cost saving and health benefits for residents and organisations.

The challenge that Cotswold District Council is rising to in this Green Economic Growth Strategy is using the climate crisis imperative to inform choices that will both tackle the changing climate and deliver the exciting priorities of the strategy.

Key local assets

Cotswold Water Park - The Cotswold Water Park is an area of over 40 square miles and 170 lakes, a significant part of which sits in the south-east of Cotswold District, with many different leisure providers, and a variety of places to stay. The Water Park is an important sand and gravel extraction location and the resulting wetlands that are created post-extraction host tens of thousands of breeding and wintering-birds. There is potential to grow the Water Park as a visitor destination, with a very different proposition to the traditional Cotswolds offer.

Cotswold Airport - (formerly Kemble Airfield) is a private general aviation airport, near Kemble. It was built as a Royal Air Force (RAF) station and was known as RAF Kemble. It is used for the storage, refurbishment, and recycling of airliners, which has come into sharp focus as the airline industry has declined during the Coronavirus pandemic. There are also flying schools, clubs and industry, including advanced engineering. There is potential to develop further employment land on the Airport site and for it to be used for testing of technologies such as electric aircraft.

Fire Service College, Moreton-in-Marsh - The Fire Service College is a leading organisation for fire prevention and protection and response, providing assessed, accredited and assured fire and multi-service training for emergency service professionals globally.

It specialises in equipping firefighters and other emergency responders with the best possible skills and training to learn the latest techniques and procedures. Their incident ground provides the opportunity for learners to train and exercise in a realistic and challenging environment. The vision for the College is to build the world’s best resilience training organisation.

Royal Agricultural University, Cirencester - The Royal Agricultural University (RAU) has been at the forefront of agricultural education and a key contributor to the land-based sector for 175 years. Today, the RAU has more than 1,100 students studying agriculture, animal science, business, environment, equine science, farm management, food, real estate and rural land management. The University, which is based in Cirencester, prides itself on its links with industry and all courses are designed to meet the demands of the employment market for land-based expertise, both in the UK and worldwide.

RAF Fairford - is an RAF base whose most prominent use in recent years has been as an airfield for United States Air Force B-52s during the 2003 Iraq War, Operation Allied Force in 1999, and the first Gulf War in 1991. It is the US Air Force's only European airfield for heavy bombers.

RAF Fairford is also the home of the Royal International Air Tattoo (RIAT), an annual air display. RIAT is one of the largest airshows in the world, with the 2003 show recognised by Guinness World Records as the largest military airshow ever, with an attendance of 535 aircraft.

It was announced in November 2018 that 1,200 US Air Force personnel and dependents would relocate to Fairford from RAF Mildenhall in Suffolk over the next five years. The situation is fluid, but it is still believed that a significant number of personnel will relocate to the site over the next few years.

Campden BRI - With over 2,500 member companies in 80 countries, Campden BRI works closely with the food and drink industry to offer a wide range of analysis and testing services and operational support underpinned by a vigorous programme of research and innovation and promoted through extensive knowledge management activities. Facilities include 3,000 sqm of laboratories for microbiology, hygiene, chemistry, biochemistry, molecular biology, brewing and cereal science, sensory and consumer studies, and packaging technology; 3,500 sqm of food process hall and pilot plant facilities including malting and brewing, retorting, chilling, milling, baking, hygiene and packaging; 800 sqm of dedicated training and conference facilities; and a dedicated consumer test centre.

Key local companies

The District is home to a number of Gloucestershire’s Top 100 companies

Company and Sector	Turnover	Employees	Location
St James’s Place (Wealth Management)	£15.7bn	1100	Cirencester
Colt Car Co (Motors)	£559.2m	223	Cirencester

Bromford Housing (Housing Association)	£257m	1800 across county	Cirencester
Nuvias Global (IT)	£142.5m	94	Cirencester
Sodra Wood (Forestry)	£138.4m	38	Cirencester
Corin Group (Medical)	£105.7m	474	Cirencester
Hardware Holdings (IT)	£32m	116	Cirencester
Socomec UK Ltd (IT)	£28.5m	75	South Cerney
Coinstone Ltd (Flour mill)	£26.9m	165	Tetbury

Source: Gloucestershire Live 2019

Key partners

Gloucestershire County Council, GFirst LEP, Royal Agricultural University, Cirencester College, Growth Hub, Chambers of Commerce, Federation of Small Business, Town and Parish Councils

SWOT Analysis of the Cotswold Economy

Strengths

- Internationally-renowned landscape and beautiful towns and villages
- Local assets like the Royal Agricultural University, Fire Service College, Cotswold Water Park, Cotswold Airport and RAF Fairford
- Successful companies like St James's Place, Colt Car Company, Bosch Rexroth etc.
- Strong underlying economy
- Very popular tourist destination
- Relatively wealthy demographic
- Best connected rural area in the country
- Skilled, well-educated and healthy population population linked to a good general quality of life

Weaknesses

- High property price to income multiplier makes housing unaffordable for many
- Broadband and mobile phone coverage is limited in a few isolated areas of the District, although improvements are continually being made
- Some parts of the district are poorly connected to the motorway network
- Public transport in areas of the district (bus and rail) is poor, making car use essential
- Lack of activities for young people mean many leave the area
- Lack of grow-on space for businesses
- Lack of digital/social media presence amongst small businesses in the area

Opportunities

- To grow key sectors like agritech, cyber and environmental technologies
- There is plenty of space in the District and employment land has been allocated
- Cirencester town centre is already attractive and the proposed masterplan could help make it the best town of its size in the country
- To make more of Cirencester's Roman connections from a visitor and cultural perspective
- To use the Local Plan Review to allocate sites and strengthen planning policies
- Government funding is likely to remain available for projects to grow the economy
- A417 missing link will improve connectivity when completed
- Parts of the district such as Cirencester could be a hub for office space relocating from London, building on the example of St James's Place
- To improve quality of tourism and increase visitor spend, building on the 'experience' of our towns and link it with other local businesses
- To distribute visitors more evenly throughout the district
- New digital skills centre at Cirencester College
- District Council's green focus could help make the area attractive for environmental technology companies
- Increased investment in local renewable energy gives opportunities for local companies.
- A move away from living and working in big cities could be to the district's advantage if we can make the right type of flexible workspace available

- To use newly-available Economic Development resource to take advantage of opportunities
- To promote active travel with benefits for health, the environment and the economy
- To develop an inclusive economy that promotes health and wellbeing

Threats

- Shift to online shopping will continue to reduce demand for physical retail space
- Trend for home-working post Coronavirus will reduce demand for office space
- Climate change
- Government focus on larger towns and cities and “levelling up” agenda
- Brexit, especially if a “No Deal”, could be disruptive, particularly in the short-term
- Reform of national planning legislation, especially the prioritisation of housing delivery over employment developments
- The Agriculture Bill could impact on the District’s farmers if enacted

Recovery from the Coronavirus Pandemic

The economy of the Cotswold District, like almost every other place worldwide, has been hit hard by the Coronavirus outbreak. The district is heavily reliant on the visitor economy, with over 5,000 jobs (18% of total jobs) currently in this sector. The lockdown has had a big impact on many of our businesses, with visitor numbers and footfall down significantly due to restrictions on movement.

Individuals and families have been affected too, with unemployment rising and many others having reduced income while on furlough. The voluntary sector has also faced significant challenges with a substantial fall in its ability to raise income.

Strengthening local communities is vital to build resilience and flexibility and reduce vulnerability to economic and other risks that can impact on the local economy as well as communities. Social isolation and the impact of Covid on livelihoods and people's mental and physical health and wellbeing can have adverse effects on the economy and increase the inequalities gap further.

Cotswold District Council has been well aware of the difficulties facing our residents, businesses and other organisations and has been quick to act, showing our determination to exercise our community leadership role. Some examples of what we have done are given below. We recognise that we cannot, nor should not, deal with a crisis of this scale on our own. So our actions have been done in the spirit of partnership, working with many others such as Gloucestershire County Council, Cotswold Tourism, GFirst LEP and Town and Parish Councils.

It looks as though the Coronavirus may be with us for a while and the economic recovery from it will take time. So our efforts will not stop and this plan sets out the various phases of our response.

Some impacts of the Coronavirus outbreak will be with us permanently – an increase in working from home, an acceleration of the shift to online shopping and a move to more digitisation. Our plan responds to these trends and we want to lead and inspire businesses to recover lost trade by being innovative and creative. We also need to be responsive to future waves and be ready to act to protect our local economy if that happens. We want to enable our businesses to become more resilient as these situations occur.

The District Council has declared a climate emergency and recognises that although the crisis is global, action must be local. This Recovery section is therefore written with our climate change objectives at the forefront of our mind. There are many overlaps between our Recovery activities and our broader economic development work, so it makes sense to incorporate details within this strategy.

The Impact of Covid-19

The pandemic has had a significant economic impact on the district as highlighted by the key indicators below:

Measure	March 2020	April 2020	May 2020	June 2020
Unemployment rate	1.4%	3.0%	4.3%	4.0%
Furloughed workers		8,975		12,900
Job Adverts	2,475	1,913	1,672	1698
Universal Credit Claims	2,697		5,450	
Retail footfall	-27%	-78%	-71%	-57%
Workplace footfall	-22%	-64%	-53%	-40%

Phased approach to recovery

Phases 1 & 2 - Pre-recovery and recovery

What we've done already

Central government has been looking to local government to provide local leadership in the face of the crisis and this is what we have done, stepping up to the challenges it has provided. Cotswold District Council has paid out over £36.5 million in Government-funded Business grants to over 2,000 businesses in the district. Over 1250 businesses have benefited from business rate relief.

The Council has been actively involved in safely re-opening our town centres, supporting businesses, putting measures in place to aid social distancing and communicating these changes to residents through a multimedia campaign.

We've worked with Gloucestershire Highways and Town & Parish Councils and local councillors to introduce measures to support social distancing in our town centres where there has been local support for such action. These have been introduced in Cirencester, Stow-on-the-Wold, Moreton-in-Marsh, Northleach and Tetbury. A further phase of works are being considered, subject to funding, using temporary traffic regulation orders. If these measures are seen as a success they can be made permanent and if they are not supported they can be reversed. We recognise that these changes can be disruptive for some people's shopping habits if it means, for example, they cannot park directly outside a shop they are buying something from. But a balance has to be struck between safety and convenience and safety must always come first.

- Our Environmental Services Team made available packs to businesses to assist with the safe re-opening of retail premises, including useful information, guidance on safe reopening, floor stickers and posters. A second pack was made available specifically for businesses in the hospitality sector, ahead of the further relaxation of lockdown rules on 4th July, again supported by a proactive communications campaign. Further communications support has been given to publicise the reduction in social distancing from 2m to '1m plus' and the requirement to wear face masks inside shops.
- We are implementing a relaxation of licensing rules for tables and chairs on the highway, to increase capacity for hospitality businesses and aid social distancing.
- We have introduced a new regular communication with business, with weekly e-newsletters and signposting enquiries to relevant partners.
- Cotswold Tourism (www.cotswolds.com) have given businesses and attractions free membership, held 14 sector meetings, been gathering data and preparing marketing messages to support businesses re-opening.
- As the lockdown has been eased further, more businesses and attractions have re-opened such as the Leisure Sector. The Council has worked with our leisure provider SLM to agree a recovery package to get the District Council's leisure centres and museums open again and able to operate on a safe and sustainable basis.
- The Council has made a £30,000 grant available to Barn Theatre in Cirencester to enable it to be used as a cinema, which will assist the Theatre directly but will also encourage more footfall in Cirencester town centre.
- We encouraged local hospitality businesses, where eligible, to register for the 'Eat Out To Help Out' scheme and promoted the scheme to consumers through our communications channels. Take up in Gloucestershire was highest in the Cotswold District with 156,000 meals at 194 outlets.

In terms of the Visitor Economy, Cotswold Tourism has been encouraging businesses to improve their online presence through websites and social media and use low cost PR and marketing techniques. The sector wants to avoid the "three winters" effect, where in effect they miss out on the high season altogether. Many UK citizens will choose to take a break in this country given the difficulties with foreign travel and rural locations are seen by many as the safest places to go.

Many previously office-based businesses have adapted to staff working from home. Some are on a phased return, others have not returned yet and a proportion may never do so or will operate on a 'blended working' model. This will have implications for the amount of office space needed, particularly in larger town centres like Cirencester, and for footfall and spending power in town centres. We will make contact with major office users to understand their issues, support businesses

who want to get back to their office bases to do so safely and will assist in finding sustainable uses for excess office space.

Phase Three is transformation, set out in this Green Economic Growth Strategy.

Growing Key Sectors

Agritech

Agritech is the use of technology in agriculture, horticulture, and aquaculture with the aim of improving yield, efficiency, and profitability. Agritech can be products, services or applications derived from agriculture that improve various input/output processes. As well as productivity benefits, agritech can bring climate and ecology benefits - this will be a massive growth issue as weather becomes less predictable, new pests arrive, and public and political interest in regenerative agriculture and plant-based eating grows.

The importance of food and agriculture has been underlined in recent times, with the Government commissioning the first National Food Strategy in 75 years. Henry Dimbleby, the Independent Lead on the Food Strategy, said: “Intensive farming practices have caused severe damage to the environment and food-related disease is costing the NHS billions and drastically harming the lives of millions. Food security, too, is a growing concern: population growth, climate change, the global increase in meat eating are intensifying resource competition between nations.” Environment Secretary George Eustice added, “The coronavirus pandemic has reminded us of the vital role our food system plays in our daily lives.”

From a Gloucestershire perspective, 70% of the county is agricultural land. Food and farming accounts for £1.5 billion of GVA and over 50,000 jobs - double the national average proportion of activity.

Farm491 at the Royal Agricultural University, Cirencester is a leading technology incubator and innovation space focused on the future of farming and food systems. It works with entrepreneurs through all their stages of growth leveraging their unique network of academic, industry and farming contacts and in house experts to help companies achieve their aspirations primarily through strategic advice, support raising investment, finding the right talent, access to new customers and being part of a network of other entrepreneurs.

Farm491 is also involved in local and national policy on AgriTech and works with national and international partners to help reduce the fragmentation in the UK innovation ecosystem.

The Draft Gloucestershire Local Industrial Strategy sets out the ambition to be a “testbed for agricultural innovation” to deliver “a healthy circular economy in food and farming”.

Having the RAU/Farm 491 and Campden BRI within the district and Hartpury College/University nearby gives the opportunity to form an agritech cluster within the County. The RAU have for a long time had an ambition to develop the Triangle site on their campus for agriculture or education-related activity. The District Council will work with the RAU to bring this site forward.

Action

Work with the RAU, LEP Sector Group and other key partners to bring forward the Triangle/University Gate site (Cirencester) for employment use, ideally as a Science/Biotech/Agritech Park with associated uses, which will support the RAU's business/student offer.

Cyber & Digital

As reliance on technology increases, so does the risk of attack, both on companies and organisations as well as on national infrastructure. As a result, a whole new industry has grown around protecting organisations from these risks.

There is an opportunity for the District to take advantage of Gloucestershire's growing reputation and momentum to be a centre for cyber security businesses and for the digital sector more broadly.

The Gloucestershire Draft Local Industrial Strategy sets out "Our ambition is to develop a county-wide testbed where businesses and education can come together to access a wealth of intellectual capital, services and shared ideas in a collaborative and trusted community."

The proposed Applied Digital Skills Centre at Cirencester College, for which £4.48 million of funding has been approved by GFirst LEP, will put the District in a strong position to attract tech companies by creating a highly-skilled workforce.

It also notes that "a vibrant SME community in cyber-tech already exists within the county" and the desire for "high quality digital connectivity and digital skills" and to "develop cyber-tech skills capability" and "promote an entrepreneurial start-up culture to attract new investment, develop talent and embed cyber-tech resilience in firms across all industries."

The words Cyber and Digital are sometimes used interchangeably and in reality one bleeds into the other. But opportunities are not just related to cyber security, but to digital industries as a whole. For example, the comparison website money.co.uk was founded in Cirencester before being sold to the owners of Zoopla. A significant number of other tech companies exist in the District, principally around Cirencester.

Although Cheltenham is leading on the development of cyber security in the area, with Cyber Central being a "flagpole of excellence", it is very much a regional growth sector. Hub8 in Cheltenham, the proposals for The Forum at Gloucester's Kings Quarter and the SGS Berkeley Green facility are all examples of how growth in the cyber sector can be spread across the region. There may be opportunities at the Fire Service College in Moreton to add Cyber to their specialism in resilience.

The Draft Local Industrial Strategy also refers to Cyber Valley - formed by GFirst LEP with the LEPs in Swindon & Wiltshire, Worcestershire and The Marches. The ambition is to double the size of the cyber-tech and digital sector in the region and to position the region as the UK's largest cluster of cyber-tech and digital activity outside London.

The District Council will investigate with partners how it can best position itself to take advantage of growth in this sector.

Actions

Work with Capita to understand the opportunities for Cyber-related uses on the Fire Service College site, Moreton-in-Marsh.

Work with Cirencester College to maximise the benefits of the Digital Skills Centre by linking it with local businesses to secure employment opportunities for young people.

Work to build the broader digital sector in the District, particularly around Cirencester.

Growing a Green Economy

Cotswold District Council has declared Climate and Ecological Emergencies and has an ambition for its Economic Growth Strategy and Local Plan to be “green to the core”. Growing the environmental technologies sector and encouraging local businesses to embed climate change objectives into their operations are important aspects of this. The LG Inform website estimates that 1614 jobs in green industries can be created by 2030 and 2483 by 2050.

The Draft LIS has an ambition for Gloucestershire to be “the greenest place to live and work in England” and “a leader in sustainable growth which enhances our natural capital assets, puts clean growth at the heart of investment decisions and builds on local green capabilities in the private sector.” It notes that “going green will not be a barrier to growth” and “will enable Gloucestershire to engage in the renewable and clean energy market.”

“People, planet and profit” are the three objectives in this sector. As is noted in the context section of this strategy, climate change considerations should flow through everything we do rather than being neatly compartmentalised. However, there are some specific areas we can target to grow the local economy in a way which meets our environmental objectives:

Actions

Use Local Plan policies to promote affordable, sustainably designed low to zero carbon homes.

Investigate opportunities to promote and invest in solar and other renewable energy forms, allocating sites in the Local Plan as necessary, in consultation with local communities.

Accelerate retro-fitting of low carbon measures - promoting the Government’s £5,000 per household Green Home scheme, encouraging local contractors to sign up for accreditation, working with Severn Wye Energy Agency, Bromford Housing Group and others.

Commission a sustainable travel strategy for the district.

Create a network of electric vehicle charging points in car parks, at workplaces, on street and on the A-road network.

Encourage local businesses to embed climate change objectives into their operations.

Other sectors

There are several other sectors, including Advanced Manufacturing, AI & Autonomous vehicles, Classic Cars, Medical Equipment, Arts, Leisure, Culture, Food & Drink and Financial Services, where the District either already has a strong presence which can be built upon or where opportunities exist to target investment.

Action

Investigate opportunities to grow other sectors within the District.

Enabling town centres to thrive

The role of town centres has evolved over time and will continue to do so. Changing shopping habits, initially to supermarkets and out of town shopping, have put pressure on town centres and in more recent times the advent of online shopping has added a new and greater threat. This has been accelerated by the Covid-19 pandemic and associated lockdown. In May 2013, 9.7% of retail sales were online. By May 2020, albeit in lockdown, this had risen to almost 33%. Services which used to be delivered face to face in town centres are now often done online.

The Grimsey Review first reported on this trend in 2013 and has since published two further reviews, the most recent one in the wake of Covid-19. Grimsey's first report highlighted that there is too much retail space in this country and that town centres needed to be recast as "community hubs, designed around health, education, culture, housing, leisure, arts and crafts and some shops." National town centre vacancy rates rose in the second quarter of 2020 to 12.4%, following the collapse of a number of major brands. Cotswold District, with its collection of smaller towns, is fortunately less reliant on national chain retailers than bigger towns and cities, although several of them are represented in Cirencester in particular. With its strong and distinctive features, for example with heritage, culture, countryside, leisure, wellbeing and food & drink, the District is well-placed to develop further its experiential offering.

Grimsey points to the importance of local leadership, putting sustainability and the environment at the heart of towns, with "fewer cars and more green spaces", more people living in town centres and being "based on quality of life and experiences and not blind mass consumerism".

Grimsey advocates establishing a "Town Centre Commission" and having a 20 year plan to work to.

The tech revolution is gathering pace and the effects of it are likely to increase rather than diminish. For the majority of businesses, having a digital presence is no longer an option. Research by tech company Maybe* showed that only 43% of independent businesses were active on social media daily prior to lockdown and this dropped to 5% during lockdown. Examples, such as Law & Co, demonstrate how a strong digital presence can be translated into additional sales. At a time when town centre footfall is depressed and will take some time to recover, if it ever does fully, this is hugely important. The District Council is undertaking a project with Maybe* to encourage businesses in the district to improve the social media presence and interact with others in their area.

Cirencester is by far the biggest town centre in the district and ranks in the top 200 town and city centres in the country. The Cirencester Town Centre Health Check Assessment (Cotswold District Council, August 2018) highlighted Cirencester's potential to be the best town centre of its size in the country. This is an ambition we should aim for and it will need the District Council and other partners to take an active place-shaping role - both in terms of longer-term regeneration projects and smaller scale interventions. The Cirencester Town Centre masterplan gives an opportunity to bring together the various partners to make this happen and will provide a structure and template for town and parish councils to replicate, where required. Cirencester's town centre vacancy rate has grown from 4% in 2014 to 8% in March 2019 and is likely to rise further in the current climate, meaning action is increasingly necessary. Better links with Kemble Station and walking and cycling routes to Cotswold Water Park are also desirable.

The smaller towns and larger villages in the District will still need to evolve, building on their strengths, particularly being local and independent and providing goods, services and experiences not available online, and protecting the functions and services that matter to the populations they serve, but can do so without the need for such formal arrangements and in partnership with Town Councils.

As part of the Council's commitment to a sustainable local economy, it wishes to promote active and innovative green travel for visitors travelling to, from and within the District, such as electric cargo bikes.

Actions

Progress the Cirencester town centre masterplan and consider trialling a Town Centre Commission as per the Grimsey Report. Provide a structure and template for town and parish councils to replicate, where required.

Identify investment opportunities for the District Council arising from the masterplan(s) which facilitate town centre regeneration and assist the vitality of the daytime and evening economies.

Work with Maybe to increase the digital resilience of small businesses in the District and celebrate successes.

Identify quick wins for town centres, including 'meanwhile' uses of vacant retail premises..

Ensure planning policies are sufficiently flexible to take account of the changing role of town centres, including allowing conversion of non-core retail premises to residential and 'flats above the shop', including for low cost affordable housing.

A Sustainable Visitor Economy

The visitor economy contributed £355 million of spend in the district and accounts for over 7,000 jobs - 18% of total employment, forming the cornerstone of what the Draft Local Industrial Strategy describes the County's "Strong and growing visitor economy".

The Cotswolds, which is a wider area than Cotswold District and covers the whole Cotswolds National Landscape, is a popular, well known destination with a reputation built on rural countryside, local limestone, vibrant towns, heritage cities and picturesque villages, along with award

winning attractions and events. The Cotswolds is a well-performing destination, with high awareness and appreciation.

Cotswolds Tourism is a partnership between the Councils that make up The Cotswolds and the visitor economy businesses within it, with the aims to:

- Lead and co-ordinate marketing of the Cotswolds
- Represent tourism locally, nationally and internationally
- Support local tourism businesses

Its Destination Management Plan has the following vision for tourism in the Cotswolds:

“To ensure that the Cotswolds is a vibrant year round destination where visitors enjoy high quality, authentic experiences and tourism makes an increasing contribution to the economic, social and environmental sustainability of the local economy.”

The Destination Management Plan sets out the objectives for the Visitor Economy. The Council’s Corporate Plan includes the following objective to “Secure successful businesses in the visitor economy with higher visitor spend and more even footfall.”

The District Council is keen to communicate more than the clichéd ‘Quintessential England’ view of the area, for example, by raising awareness of distinctive local foods, the arts and cultural scene, the opportunities for eco-tourism and health and wellbeing experiences. The District Council aims to encourage a wider geographical spread beyond the most famous villages and to promote the area as an “all year round” destination rather than have a heavy concentration of visitors in the summer. This can be achieved by better information on locations throughout the District and promoting all-year-round activities and experiences. It also wishes to convert day visits into overnight stays, with consequently higher spend. This will have implications for the amount of visitor accommodation in the district.

As part of the Council’s commitment to sustainable tourism, it wishes to promote active and innovative green travel for visitors travelling to, from and within the District.

Actions

Review tourism service and refresh destination management plan with the aim of meeting the Council’s objective of sustainable tourism.

Deliver the actions set out in the Cotswold Tourism destination management plan

Make the Cotswolds a vibrant year-round destination

Increase tourism’s contribution to the economic, social and environmental sustainability of our communities

Infrastructure

Broadband

Broadband is now seen as an essential utility along with water and electricity. In a rural area, the lack of a reliable broadband connection can add to social isolation as well as reduce opportunities to be economically active. With double the national average of people in the district working from home and the ambition to market the district as an attractive place to do so, and the County's ambition to grow the cyber and digital sectors, good broadband is even more important.

The Fastershire programme is a partnership between Herefordshire and Gloucestershire Councils which was established in 2011 to act as a conduit for public funding to overcome market failure in the delivery of broadband to homes and businesses.

The programme has been a success, with figures showing Fastershire projects will have boosted the economy by £420 million over 10 years. As of July 2020, 95.3% of premises within the district were connected to Superfast Broadband (30mbps) with 40.12% connected to Ultrafast (100mbps), making it **the best connected rural area in the country**. However, even with Superfast connectivity, some businesses even in Cirencester town centre cannot operate in the way they would wish to.

The District Council has shown its commitment to broadband provision by setting aside £500k in match funding in 2016 to help the Fastershire programme access the harder to reach parts of the district.

Openreach have recently announced that Cirencester will be a Full Fibre Town by 2025.

Local Plan policies should ensure the fastest available broadband is installed in new developments at the outset unless there is a good reason not to do so.

Actions - Work with Fastershire to complete the rollout of Superfast broadband across the district
Capitalise on the district being the best-connected rural area in the country
Review local plan policies to ensure they assist delivery of broadband

Mobile phone signal/4G/5G rollout

Good mobile phone coverage is also important for a well-connected district. Signal can be poor for some networks in some parts of the district and it is understandable that there may be reluctance to site mobile phone masts in sensitive locations.

The District Council can assist with identifying mast sites for areas with limited coverage, whether they are in the ownership of the Council or third parties. Local Plan policies support operators to extend coverage unless there is a good reason not to do so. Local councillors have a role to play in identifying “not spots” and lobbying the operators to address them.

In March 2020, the Government and the four main operators signed the Shared Rural Network agreement. The Shared Rural Network (SRN) is a deal with EE, O2, Three and Vodafone investing in

a network of new and existing phone masts they would all share. This will increase coverage to 95% of UK land mass by the end of 2025. The District Council will lobby to ensure the SRN deals with the not-spots in the district.

Actions

Lobby the Single Rural Network programme to address the “not-spots” in the district.

Build relationships with the Mobile Phone Network Operators and secure commitments to address “not-spots”.

Transport

A417 Missing Link

The A417/A419 provides an important route between Gloucester and Cirencester, leading on to Swindon, that helps connect the Midlands/North to the South of England. It's an alternative to the M5/M4 route via Bristol. The Missing Link itself is a three-mile stretch of single-lane carriageway on the A417 between the Brockworth bypass and Cowley roundabout.

The Missing Link causes many problems for road users and those who live or work in the area. Congestion can be frequent and unpredictable so some motorists divert onto local roads to avoid tailbacks. This causes difficulties for neighbouring communities and local roads were not built to accommodate so much traffic. Poor visibility and other factors also mean that accidents, many of which are serious, occur frequently along this section of road.

The scheme has four key objectives:

- **Transport and safety:** to reduce delays, create a free-flowing road network and improve safety along this stretch of the A417
- **Environment and heritage:** to reduce the impact on the landscape, natural and historic environment of the Cotswolds and, where possible, enhance the surrounding environment
- **Community and access:** to reduce queuing traffic and pollution, improve access for local people to the strategic road network, and support residents and visitors' enjoyment to the countryside
- **Economic growth:** to help boost growth and prosperity by making journeys more reliable and improving connectivity

The scheme has been delayed due to design changes, with the Development Consent Order expected to be submitted in the first half of 2021, a spade in the ground in the first quarter of 2023 and the road being completed during 2026.

The project represents an enormous investment believed to be in excess of £400 million. The scale of the project means there will be many opportunities for local contractors, suppliers and training and apprenticeship opportunities. The improved connectivity opens up opportunities for businesses to locate within the Cotswold District who may previously have been put off by the congestion. It

may also give some limited opportunities for appropriate development along the route of the new section of road.

There is a risk of some disruption arising during construction and the District Council will work with Highways England and Gloucestershire Highways to mitigate this.

Other transport infrastructure

There are a range of other road infrastructure improvements identified through the Local Plan which will be implemented as funding becomes available.

There is an aspiration to invest in a new sustainable transport strategy that will help to facilitate the decarbonisation of vehicular movements and if possible promote alternative modes of transport - especially within the urban areas; this will also include creating a new post at Cotswold District to facilitate this and the commissioning of a Sustainable Transport Strategy.

The Local Industrial Strategy refers to an ambition of “innovative technology-driven transport solutions in rural areas” and Cotswold District wishes to be at the forefront of this.

A project has been initiated to look at the feasibility of re-establishing a rail link between Cirencester and Kemble (for more details, see www.cirentrain.org.uk). This could have economic benefits for Cirencester and the wider District. The District Council has part-funded the feasibility study, which is expected soon.

Action

Work with Highways England to maximise the economic benefits of the A417 Missing Link project in terms of opportunities for local suppliers and contractors, apprenticeship and training opportunities and any appropriate development opportunities that arise as a result of the scheme.

Skills

Having the right skills is vital to meeting the District’s objectives of having a high value, highly-skilled, low environmental impact economy and ensuring our young people are equipped to match the needs of local employers. With unemployment rising as a result of the Coronavirus pandemic, assisting those looking for work with access to retraining will be more important than ever.

The Draft Local Industrial Strategy sets out Gloucestershire’s ambition to be the most flexible place to work, adding “It is essential that businesses have access to people with the right skills to support high quality productive jobs”.

It notes that “Gloucestershire aims to be a place where high quality education, training and support can equip people with the skills they need in a growing high-value economy. It is also a place where no-one is left behind.”

The LIS and Gloucestershire Vision 2050 both point to the numbers of young people, estimated at 400 a year, being lost from the County due to a lack of suitable opportunities. The LIS also references the need to ensure an ageing workforce can continue to make a contribution .

The District Council will work with GFirst, Gloucestershire County Council, Adult Education, the National Careers Service and local training providers to address unemployment and provide the skills businesses need. Cirencester College offers Digital, Construction, Education and Childcare T-levels, which are a vocational qualification involving a work placement.

The new Applied Digital Skills Centre being built at Cirencester College gives the district a great opportunity both to develop a workforce with the digital skills needed in the 21st century, but also to grow its digital and cyber sectors. The LIS mentions “Digital Skills Partnership” to be set up by the Skills Advisory Partnership to co-ordinate activity and ensure we maximise the benefits of the growth in the cyber sector for local people. The District Council will play its part in this to encourage our young leaders through local organisations and partnering with leading businesses.

The Royal Agricultural University will help to meet the ambition of closing the LIS’s digital and technical skills gap in food and farming.

GFirst’s Reimagine and Restart recovery plan talks of identifying potential for jobs in cyber security, broadband infrastructure, agritech, green energy and housing stock retrofits and thereafter creating Career Hubs and an Apprenticeship Clearing House.

The fragmented nature of provision, funding and responsibility for skills and training can make for a complicated and confusing landscape for those seeking help. We will work with partners to make the offer coherent and easy to access and will work with business to ensure their needs are heard and responded to.

Actions

Work with key partners like the County Council, GFirst LEP, Cirencester College and others to address the needs of employers, make the offer to those in need of training coherent and easy to navigate and signpost to relevant providers where necessary.

Work with the Department for Work and Pensions and other partners to establish one or more Youth Hubs across the district virtually or physically.

Inward Investment

The District Council will take a proactive approach to securing inward investment. It is not enough to simply allocate land in the Local Plan, although that is an important part of the process. A supportive and welcoming local authority can make a huge amount of difference. We will proactively market available sites in the district to key growth sectors, offering a warm welcome, a helping hand and supportive planning environment.

We will work alongside GFirst LEP to co-ordinate activities and add value to their Inward Investment Project.

We will also take an active role in encouraging new tenants and new uses into our town centres, with both meanwhile and permanent uses, liaising closely with landlords and commercial agents.

There are several employment site opportunities allocated in the Local Plan, some of which already benefit from planning permission.

Bourton-on-the-Water	Land north of Bourton Industrial Estate / Business Park	3.38	B1/B2/B8	15/03318/OUT
Chipping Campden	Battle Brook / Extension to Campden Business Park	0.67	B1/B2/B8	–
Lechlade	Land north of Butler's Court	1.25	B1	–
Moreton-in-Marsh	Fire Service College B	7	B1	–
Willersey	Land north of B4632 and east of employment estate	1.97	B1/B2/B8	–

The Council will also invest directly in projects where they meet the investment criteria set out in our Recovery Investment Strategy and our wider objectives.

The District Council will also take an active role in identifying and bidding for funds when it aligns with our wider objectives, whether it is from Central Government or elsewhere, working with and through others where appropriate to maximise the resources available in the district.

Actions

Allocate more land for employment through the updated local plan

Secure the provision and occupation of new commercial space

Improve the information available on the Economic Development page of the District Council website, including developing inward investment collateral.

Maintain a register of available sites and properties within the district to match to potential investors and occupiers.

Investigate opportunities to build sector clusters in the district.

Proactively contact potential businesses for relocation/growth.

Take an active role in identifying and bidding for funding which meets the Council's objectives, whether that is through the District Council bidding or supporting bids from partners

Invest in local projects and development opportunities

Use Council assets to generate jobs locally

Support for business

A strong business community in the District is vital for a healthy economy. Small businesses account for the vast majority of employment in the District. 90% of businesses in the District have nine or fewer employees. Cotswold District Council is business-friendly and is in touch with its business community. We want to encourage and support existing businesses to grow and new businesses to start up. The Gloucestershire Draft Local Industrial Strategy notes that “a healthy local business environment is essential in helping businesses grow”. We will work with the “Start and Grow” programme at University of Gloucestershire and The Growth Hub based at the Royal Agricultural University in Cirencester. We will look to enhance the Growth Hub provision in the north of the District.

In February 2020, the District Council approved a budget for a new Economic Development Lead post, with the position being filled in July 2020. This gives the authority capacity to actively engage with businesses and identify projects and actions to support the economy.

The Local Industrial Strategy aims for Gloucestershire to be the most flexible place to work in the UK. The Coronavirus pandemic has brought about a shift in working practices which looks set to form part of the “new normal”. Increased home working and ‘blended working’ highlight the need both for good broadband connections and a network of ‘Work from Anywhere’ locations, including Growth Hubs.

Cotswolds Tourism works to support businesses connected with the visitor economy.

The Council will work with the Barriers to Growth working group of the Local Enterprise Partnership to promote a positive planning environment for businesses wishing to invest in the District.

Local Plan policy EC2 provides protection for employment premises from change of use. The Local Plan provides support not just for traditional types of employment use, but for broader employment generating uses - e.g. diversification of Cotswold Water Park.

Actions

Undertake a programme of business engagement visits around the district

Create a network of “work anywhere” spaces throughout the District, including investigating the provision of an enhanced Growth Hub provision at Moreton-in-Marsh

Innovation

Cotswold District’s ambition is to be at the forefront of innovation in the County. We have many innovative companies ranging from digital to medical equipment, from equine to engineering.

Gloucestershire’s Local Industrial Strategy contains an ambition to be an “innovation active county” and describes Gloucestershire as the “hidden innovation capital of the UK”. 70.3% of the county’s businesses are “innovation active” compared with a national average of 55.1%. The County spends

3.3% of GVA on research and development - one of only a few counties to spend above the national target of 2.4%.

The LIS includes an ambition for the LEP to create an Innovation Factory, bringing together innovation assets including the Royal Agricultural College and Farm 491 and the Campden BRI to drive innovation through collaboration. The District Council will support and assist with this as necessary.

Action

Support innovative companies in the District to capitalise on their research and development and collaborate where it is advantageous to do so.

Housing Growth

The Local Plan has allocated 8,400 homes to be built during the plan period of 2011-2031, along with 24 hectares of employment land. The Local Plan is currently being updated, although the Government is also proposing radical reforms to the planning system which would significantly increase the number of homes required in the Cotswold District. The District has significantly delivered well above its housing target for the last five years.

The largest site allocated in the adopted Local Plan is at Chesterton, now known as The Steadings, which has consent for 2,350 homes and 9 hectares of employment land. The first phase of employment land will be delivered early in the development.

Delivery of major allocations will give opportunities for local labour, local contractors and apprenticeships, as well as to showcase environmental and energy saving features, particularly as technology develops, making some features more affordable to both the developer and future householder.

There are 24 other residential site allocations identified in the local plan, which range in size from 5 to 119 dwellings and would contribute a further 510 dwellings.

Given the issues with housing affordability in the district, the delivery of affordable housing is crucial in order to provide accommodation for the local workforce. The Administration has identified this as a priority, particularly social rented housing. We will support innovative solutions to providing new affordable housing near our main economic centres.

Actions

Work with Bathurst Developments to maximise the benefits of The Steadings development

Work with partners to ensure that barriers to the delivery of sites are removed

Support innovative solutions to increase the supply of affordable housing near to our main economic centres

Inclusive Growth

Inclusive growth is “a concept that advances equitable opportunities for economic participants during economic growth with benefits incurred by every section of society.”

Cotswold District within the top 15% least deprived local authorities in England (276th out of 317 in the Index of Multiple Deprivation). The District is also the second least deprived authority in Gloucestershire. The District’s national ranking has improved by five places since 2015³.

Despite the District’s good overall ranking, granular analysis exposes pockets of deprivation in some areas. Several of the District’s Lower Super Output Areas, such as Chesterton I and The Ampneys and Hampton I, feature in the top 10% most deprived areas in Gloucestershire for Multiple Indices of Deprivation. ‘Barriers to Housing and Services’ is a particular issue.

Cotswold District also experiences a ‘digital divide’. This is where some people do not have the skills to use a smartphone or a computer or do not have the means to buy these things. It is important that green economic growth is inclusive of people who are currently unable to access digital resources.

Social value is defined as: *‘A process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment.’*

It is also defined as:

‘The additional benefit to the community from a commissioning/procurement process over and above the direct purchasing of goods, services and outcomes.’

The Public Services (Social Value) Act is not prescriptive in what should be done, but rather states that the procurer must consider ‘how what is proposed might improve the economic, social and environmental well-being of the relevant area’.

Examples could include:

- Creating skills and training opportunities
- Targeting long term unemployed, NEETS and disadvantaged groups
- Offering work placements to school children and young adults
- Providing career advice
- Offering curriculum and literacy support to schools
- Creating supply chain opportunities to SMEs and Social Enterprises
- Contributing to local community projects
- Providing energy efficiency advice for residents

³ [English Indices of Deprivation 2019](#) (MHCLG, September 2019)

- Initiatives that target fuel savings for customers
- Skills workshops for residents
- Neighbourhood improvement projects

The Council is currently in the process of preparing a Procurement and Commissioning Strategy which builds in requirements around social value.

Voluntary sector

Gloucestershire has a very healthy Voluntary Sector and the same is true for Cotswold District.

The social benefits of voluntary action are well understood. Charities and community groups bring people together, support communities, and can build social capital. However the economic importance of the voluntary sector is often less recognised.

Nationally, according to the Charity Commission, the largest proportion of registered charities – approximately one-third of the total – are involved in the provision of social services, culture and recreation. This pattern of activities is replicated in Gloucestershire.

‘The State of the Sector Report 2019/20’ which was conducted by the Gloucestershire VCS Alliance revealed that there are 635 registered charities in the district (highest number in the county) with a turnover of £137,765,855 (excluding educational institutions), 1458 employees and over 2000 volunteers. We therefore recognise that as well as generating growth in social capital, charities and voluntary organisations can foster economic growth locally.

District	Charities <i>excluding</i> educational institutions	Turnover 18/19 (£)	Reserves 18/19 (£)	Paid Employees	Volunteers
Cheltenham	332	65,462,654	127,582,022	1722	3323
Cotswolds	566	137,765,855	154,375,066	1458	2048
Forest of Dean	329	52,300,423	58,030,739	717	430
Gloucester City	258	110,075,075	50,893,746	916	3419
Stroud	528	81,942,042	59,967,634	1915	3186
Tewkesbury	270	17,116,726	11,770,252	163	1720
Total	2283	464,662,775	462,628,459	6891	14,126

The report also highlights that ‘87% of organisations receive grant funding. Grant funding remains the lifeblood of the sector. 50% deliver on public sector contracts. This potentially puts the local VCSE in a precarious position as the public sector is getting smaller and there are signs that in future there will be fewer contracts going to bigger players, whose headquarters may well be based out of county’. We will work with our local charities to help them generate growth which can create wealth and help keep this money circulating within our local area.

Another important role of charities is to provide early intervention support which in turn helps the public sector to save money. Joined-up local commissioning and removing barriers to provide incentives for Public Sector partners to increasingly invest in preventative services locally will be key as well as helping local groups and charities to develop skills in alternative fundraising activities (e.g Crowdfunding).

Actions

Deliver social value through the procurement of District Council contracts

Take steps, working with partners including the voluntary sector, to bridge the digital divide that exists within Cotswold District

How we'll work

- Collaboratively – We can't achieve this strategy on our own. We'll bring all of our partners together – from the County Council and LEP to Town & Parish Councils, businesses and the Chambers of Commerce to Homes England and the Arts Council & Cotswolds National Landscape.
- Strengths-based – Working with our communities, not imposing our ideas on them
- Putting the environment at the heart of the recovery
- Inclusive – The recovery will include all parts of our community, ensuring no-one is left behind
- Bold, ambitious and innovative – We will need to take tough decisions, show strong leadership and do things differently to ensure a robust and sustainable recovery
- Rebuilding trust and confidence in the council by promoting a culture of openness and transparency
- Value for money - we will use the council's resources wisely, but will invest in the fabric and future of the district
- Listen, hear, act - we will seek thoughts and ambitions from our residents to inform our decision making

Measures of Success

It is important that the success of this Strategy and the health of the local economy is measured and monitored. Below are some suggested measures. As part of the consultation on this document, we will be asking whether people feel these are the right measures or wish to suggest alternatives.

Reports setting out progress against the objectives of this strategy will be presented to the District Council's Cabinet on a regular basis

- Employment levels & job adverts
- Business start-ups
- Business failures
- Value of the local economy (GVA)
- New commercial space built/let
- Town Centre vacancy rates
- Town centre car park occupancy
- Council direct investment in local economy
- Delivery of new and enhanced infrastructure
- Delivery of housing growth
- Delivery of affordable housing