

Gloucestershire Local Transport Plan

Evidence Base





Introduction

This annex outlines the evidence base developed to inform Gloucestershire's Local Transport Plan (LTP) update. It presents the strategic context for current travel, socio-economic and environmental conditions in Gloucestershire and can be treated as a baseline to measure progress made through the delivery of the LTP.

The evidence base will enable targeted measurement of progress towards the vision, delivery priorities, objectives and targets of the LTP. It will also allow Gloucestershire County Council (GCC) to monitor and evaluate progress in line with the Department for Transport's (DfT) requirements.

Understanding Gloucestershire

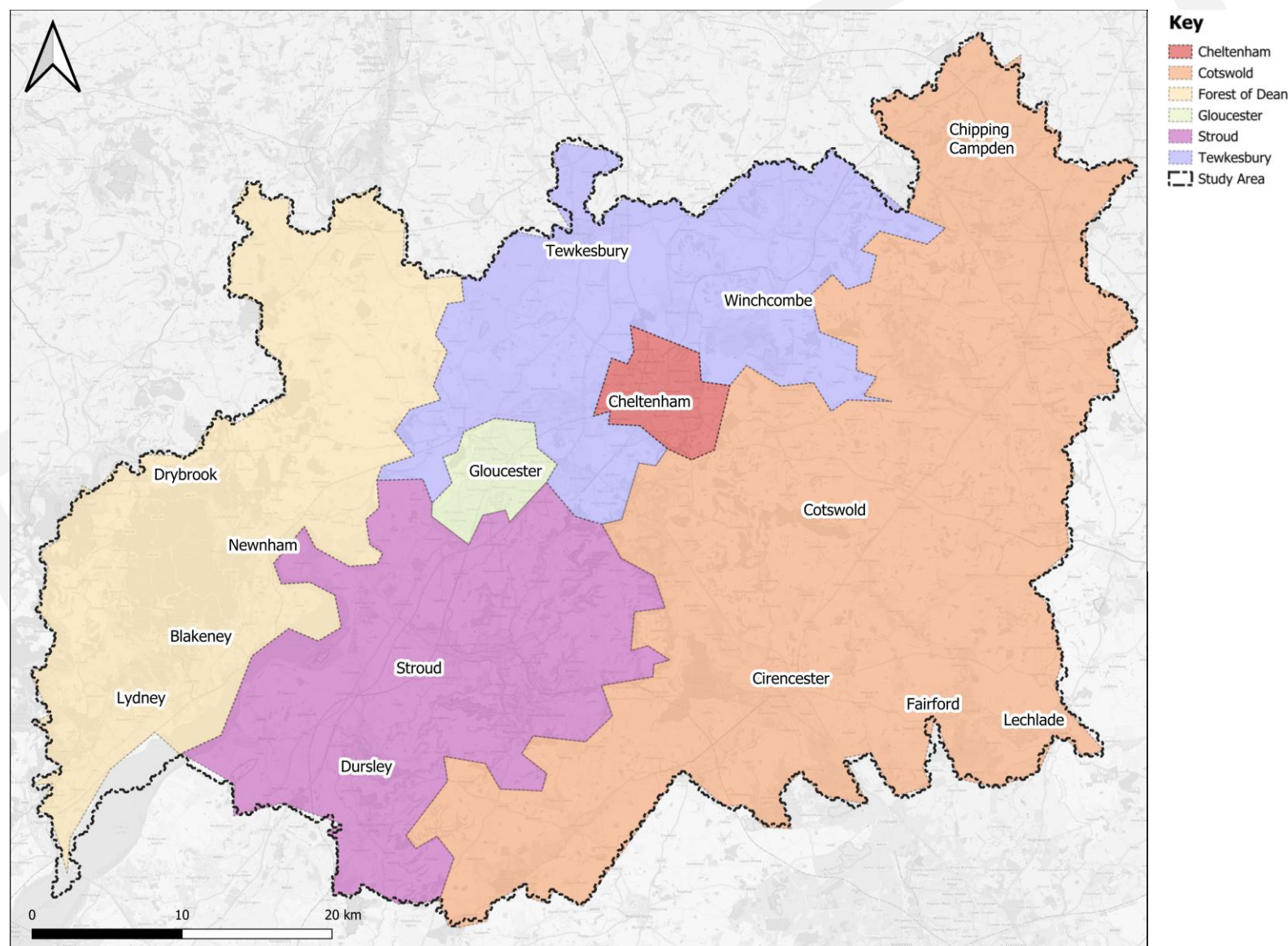


Gloucestershire's Places

Gloucestershire is located in South West England. It is bordered by Herefordshire to the north-west, Worcestershire to the north, Warwickshire to the north-east, Oxfordshire to the east, Wiltshire to the south, Bristol and Somerset to the south-west and the Welsh county of Monmouthshire to the west.

Gloucestershire comprises of six districts including Cheltenham, Cotswold, Forest of Dean, Gloucester, Stroud and Tewkesbury. This evidence base will use the six districts to explore and describe the baseline data for Gloucestershire, as displayed in Figure 1.

Figure 1: Gloucestershire Study Area



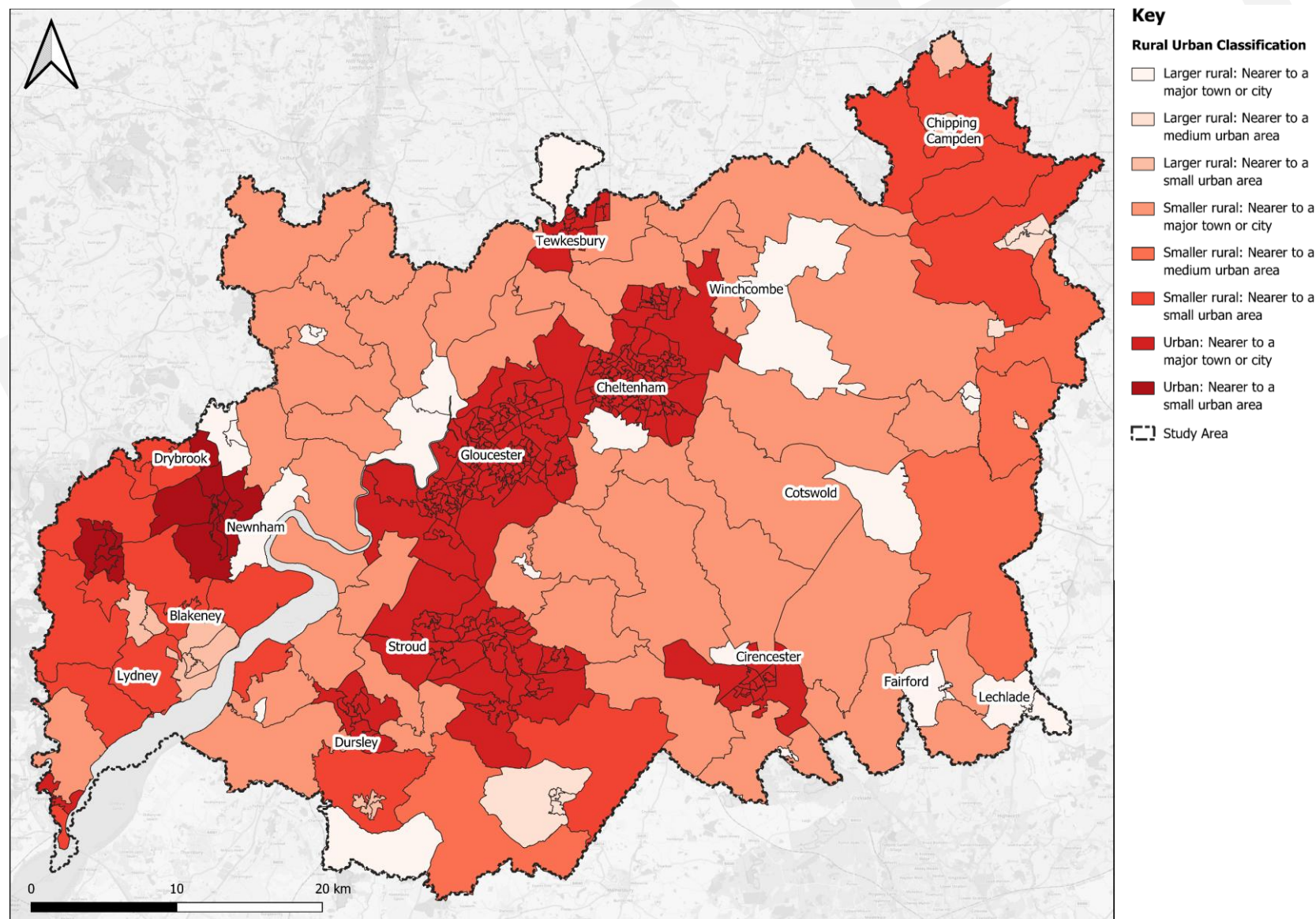
Rural-Urban Classification

As shown in Figure 2, Cheltenham and Gloucester are classified as urban areas and the remaining districts are made up of a combination of urban and rural classifications. The market towns of Stroud, Cirencester and Tewkesbury are classified as urban but outside of these locations in Cotswold, Stroud and Forest of Dean are largely rural.

The majority of the county (87.5% of the total area) is classified as rural. However, only 29.2% (2022) of the county's population resides in the rural areas. Therefore, around 70% of the county's population reside in areas classified as urban.

Gloucestershire (87.5%) has a higher proportion of its output areas classified as rural compared to the national average (84.5%) but a lower proportion than the regional average (90.7%). When compared to other county and unitary authorities across England and Wales, Gloucestershire is the 33rd (out of 179) most rural authority in terms of its geographic area and therefore is within the top 20% of authorities in terms of rurality.

Figure 2: Rural-Urban Classification of Gloucestershire



Source: 2021 Census Rural Urban Classification

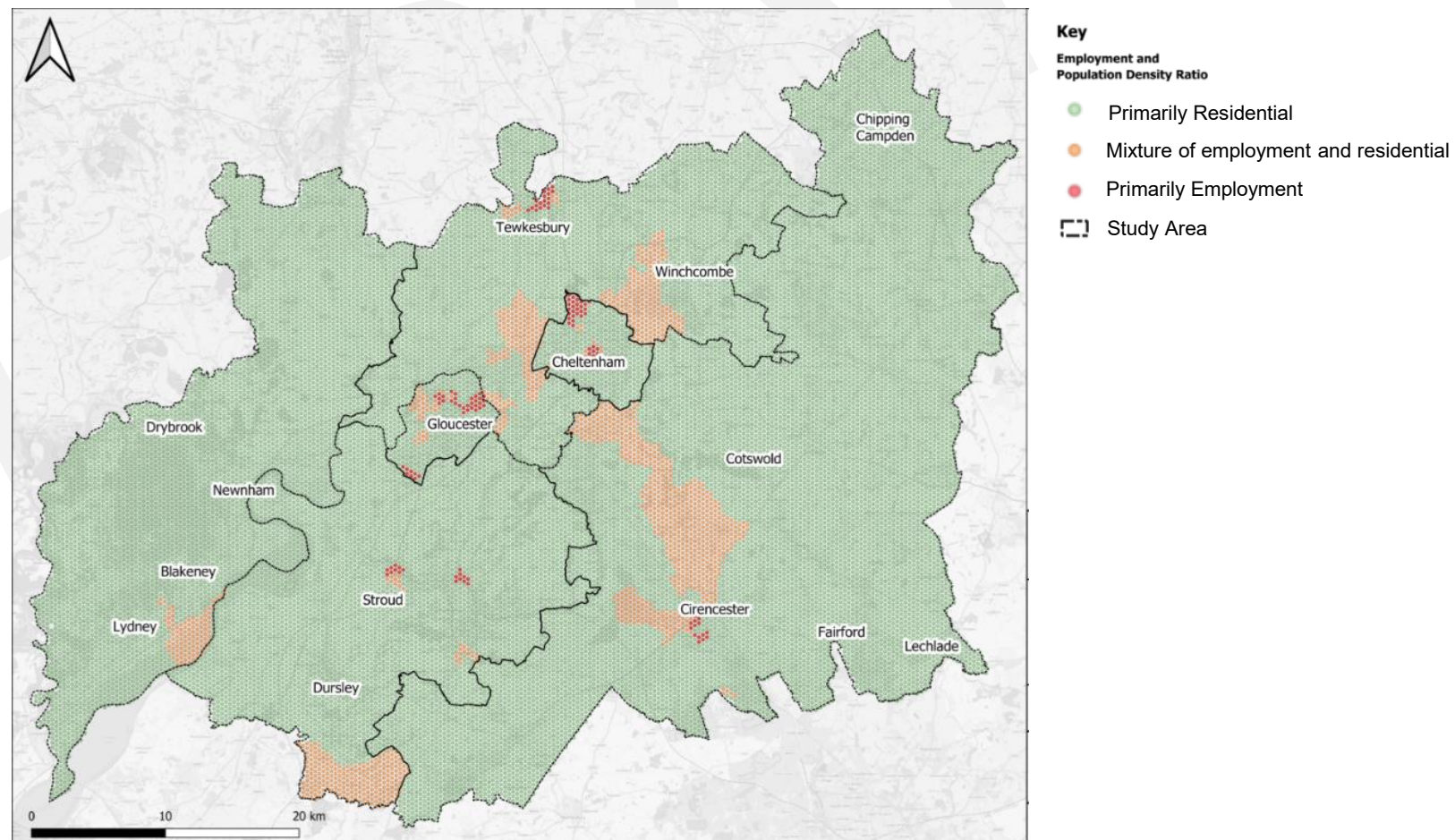
Employment Centres

Employment opportunities in Gloucestershire are primarily concentrated within Cheltenham and Gloucester, where a number of large employers are located such as Gloucester Business Park, GCHQ, Gloucestershire Royal Hospital, Gloucestershire County Council, UCAS, GE Aviation, Cheltenham Racecourse, and Safran.

Figure 3 below presents an employment-to-residential density ratio for Gloucestershire, calculated by comparing the total number of jobs with the resident population within each area. The map shows that much of Gloucestershire is predominantly residential, particularly across the rural areas of the Cotswolds and Forest of Dean. In contrast, the strongest employment concentrations are located in Gloucester and Cheltenham, with smaller employment hubs centred on Tewkesbury, Stroud and Cirencester. Areas with a more balanced mix of residential and employment activity are evident around Tewkesbury, Gloucester, Lydney and along the corridor between Cheltenham and Cirencester.

The spatial distribution of employment highlights the importance of good transport connectivity between Gloucestershire's rural communities and its principal employment centres to support commuting and shift patterns to ensure all residents have equal access to employment opportunities across Gloucestershire.

Figure 3: Employment and Residential Ratio in Gloucestershire



Source: OS AddressBase Plus

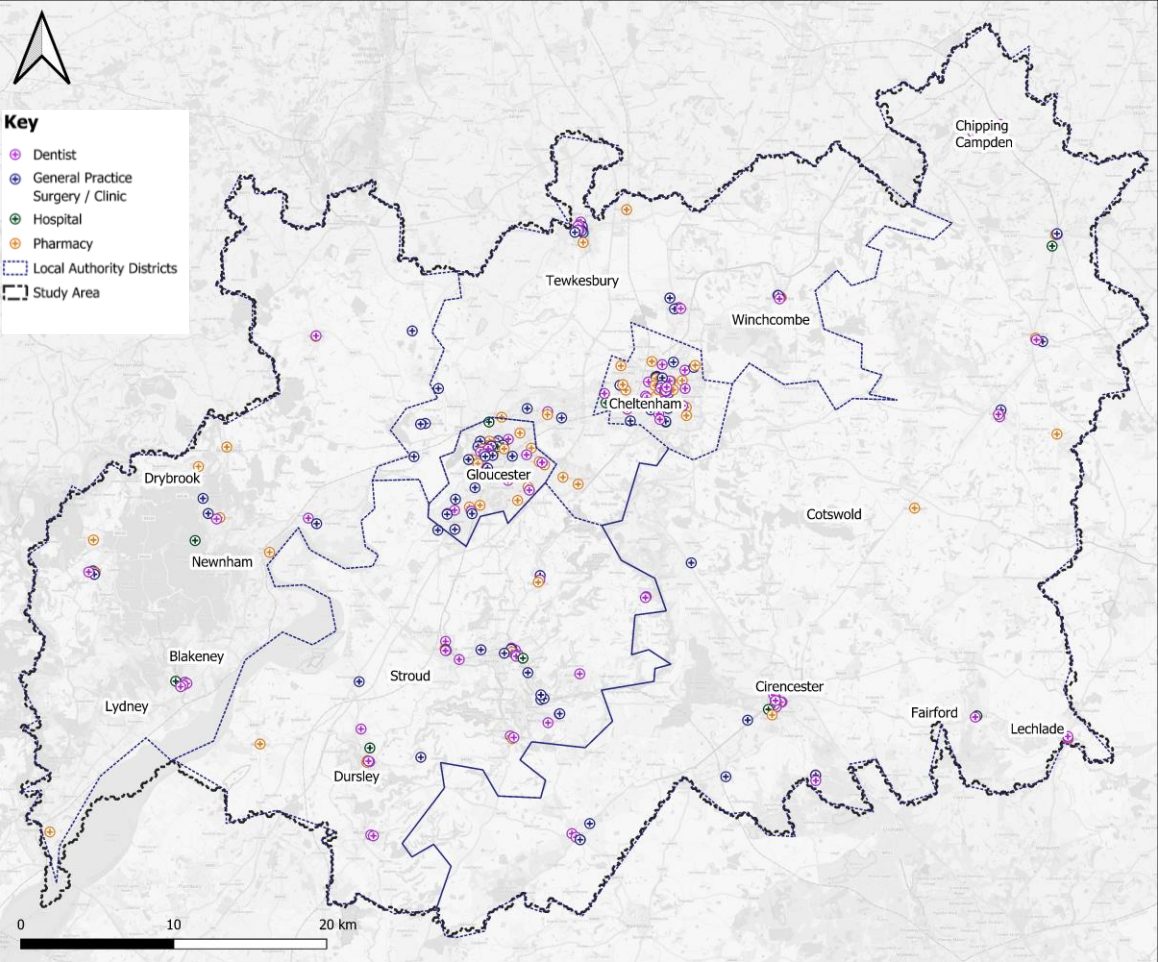
Health Facilities

The location of Gloucestershire’s healthcare infrastructure is concentrated within the county’s main urban centres, particularly Cheltenham, Gloucester, and Stroud, which contain the highest density of healthcare services. This is shown in Figure 4. There are four major NHS hospitals in the county including Gloucestershire Royal Hospital, Cheltenham General Hospital, Stroud General Hospital and Cirencester Hospital. According to NHS England data, there are 64 GP surgeries operating across the county, collectively serving approximately 723,000 registered patients.

Cheltenham and Stroud contain the highest number of GP practices (13 each), while Tewkesbury has the lowest (7). The number of GPs per Local Authority District in Gloucestershire is detailed in Table 1, alongside the total registered patients and the average number of patients per practice. Interestingly, the data shows the number of practices alone does not fully reflect healthcare provision. Gloucestershire's GP Practices vary significantly in size, with some practices serving substantially larger patient populations than others. For example, Gloucester contains only 17% of Gloucestershire’s practices (11 of 64) but serves around 22% of all registered patients (156,365 of 722,954), highlighting the particularly high demand placed on primary healthcare facilities within the city. In contrast, Cotswold and Forest of Dean have the lowest average patient registrations per Practice, at 9,464 and 9,189 respectively.

For those living in well-connected urban areas such as Cheltenham and Gloucester, frequent and convenient access to health centres can support better health outcomes. Conversely, individuals in rural locations such as Cotswold and Forest of Dean where significant proportions of the elderly population reside, poor transport connectivity could impact on overall levels of health and wellbeing.

Figure 4: Health Facilities in Gloucestershire



Source: OS AddressBase Plus

Table 1: NHS England Patients Registered at a GP Practice, July 2026

District	Number of GP practices	% of GP practices	Total Registered Patients per practice	% of Registered Patients per practice	Average Patients per practice
Cheltenham	13	20%	157,548	22%	12,119
Cotswolds	10	16%	94,643	13%	9,464
Forest of Dean	10	16%	91,894	13%	9,189
Gloucester	11	17%	156,365	22%	14,215
Stroud	13	20%	136,551	19%	10,504
Tewkesbury	7	11%	85,953	12%	12,279
Total	64	100%	722,954	100%	11,296

Source: NHS England

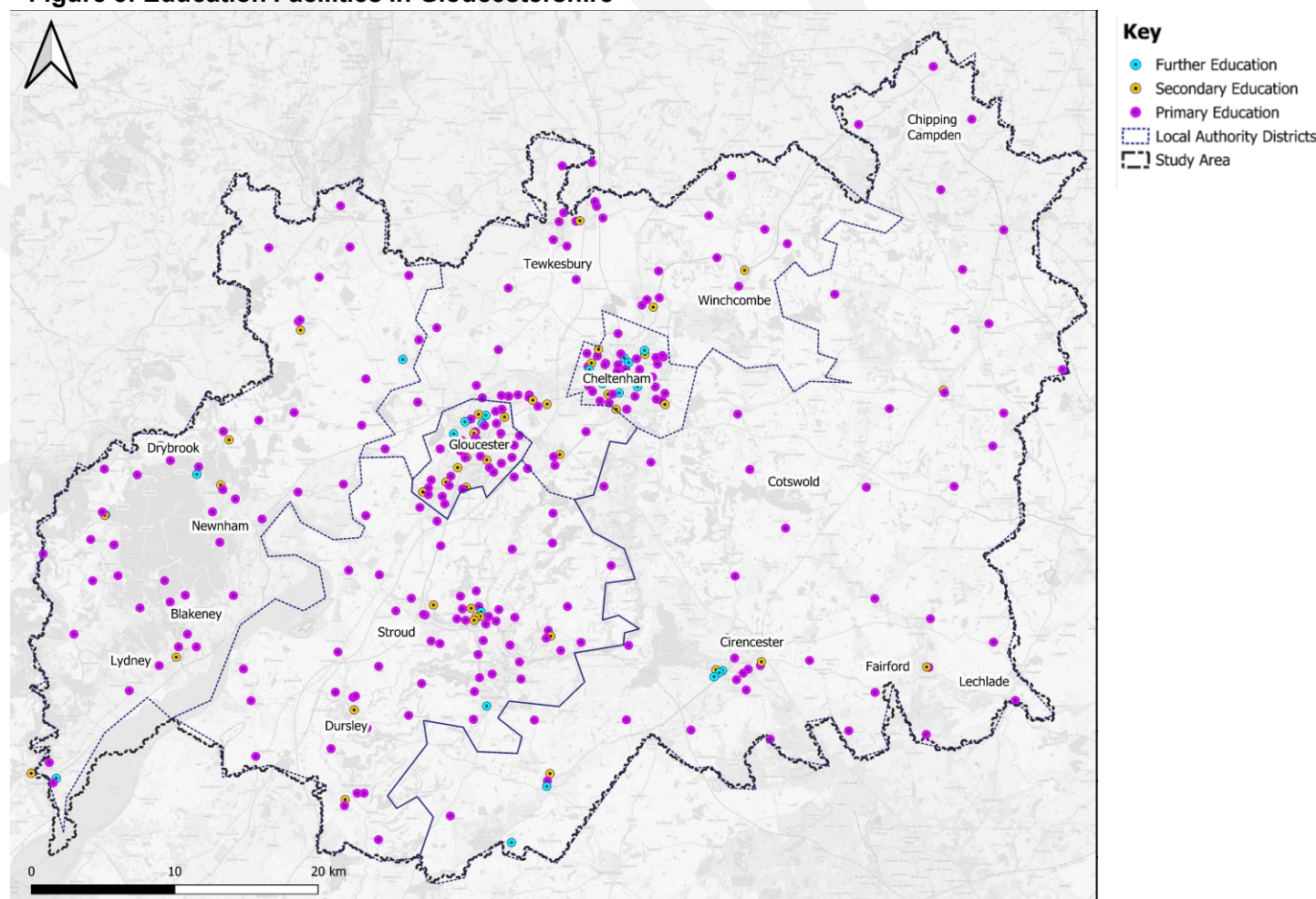
Education Facilities

There are 246 primary schools and 41 secondary schools in Gloucestershire. The highest concentration of education facilities are located in Cheltenham and Gloucester and Stroud town centre, as shown in Figure 5. University of Gloucestershire is located across four campuses in Cheltenham and Gloucester and offers undergraduate and post-graduate courses.

In contrast, Tewkesbury, Forest of Dean, the Cotswold and rural parts of Stroud have a lower density of education facilities, reflecting their predominately rural character. Under the Home to School Travel Assistance Policy¹, children are entitled to free school transport if they live beyond a specified distance from their nearest suitable school: over 2 miles for children under 8 and over 3 miles for those aged 8 and over children are entitled to free school transport if they live beyond a specified distance from their nearest suitable school: over 2 miles for primary-aged children (under 8) and over 3 miles for those aged 8–15. As a result, demand for home-to-school transport is proportionately higher in rural areas, where travel distances are greater.

The reduced provision of education facilities in areas in the Forest of Dean, the Cotswolds, and southern parts of Stroud increases reliance on transport connections to larger centres. This places a requirement for frequent and well-timed public transport services, particularly at school start and finish times, to connect students to district centres such as Lydney, Cirencester and Dursley, and university students to Cheltenham and Gloucester, ensuring equitable access to education across Gloucestershire.

Figure 5: Education Facilities in Gloucestershire



Source: OS AddressBase Plus

¹ Gloucestershire County Council (2025) Home to School Travel Assistance Policy [online] available at: <https://www.gloucestershire.gov.uk/media/t0wbc1gn/home-to-school-travel-assistance-policy.pdf>

Major Visitor Attractions

Gloucestershire offers a diverse range of visitor attractions, spanning historic market towns, castles and forests, alongside sports and retail destinations.

Figure 6 illustrates the spatial distribution of these attractions, highlighting a strong concentration within Gloucester and Cheltenham. These urban centres attract high visitor numbers due to their rich cultural and historic assets, including Gloucester Cathedral, Gloucester Docks, Kingsholm Stadium, Cheltenham town centre, Pittville Park and Cheltenham Racecourse.

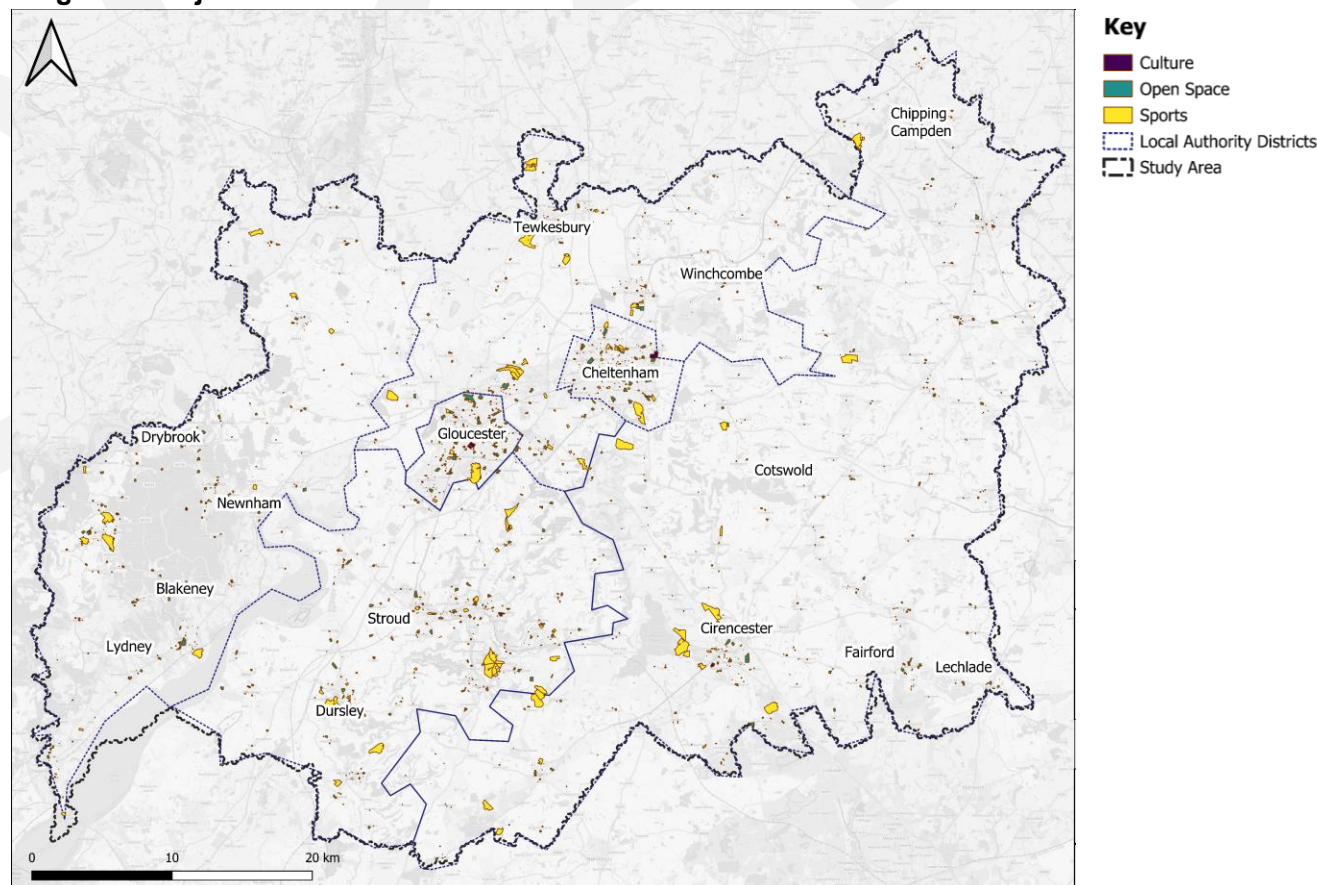
Beyond these centres, Gloucestershire's wider area is characterised by a significant number of castles, historic estates and market towns, which continue to draw visitors seeking to experience traditional British heritage. Notable destinations include Sudeley Castle, Tewkesbury Abbey, Bourton-on-the-Water, Stow-on-the-Wold and Cirencester.

The county's extensive rural landscape further enhances its appeal, supporting a wide range of outdoor and recreational activities such as walking, cycling, wildlife exploration and adventure sports. Key assets include the Forest of Dean, the Wye Valley, the Cotswold Way and Cotswold Water Park, all of which offer varied activities and high-quality scenic environments.

In addition, major annual events, such as the Cooper's Hill Cheese Rolling and the Cheltenham Festival at Cheltenham Racecourse and the Cheltenham literacy festival, attract visitors from across the UK and internationally, making a significant contribution to Gloucestershire's visitor economy.

Overall, in 2024, Gloucestershire welcomed approximately 15.7 million-day visitors (8.2 million urban and 7.5 million rural visits) who contributed £748.2 million in daily spend.

Figure 6: Major Visitor Attractions in Gloucestershire



Source: OS AddressBase Plus

Understanding Gloucestershire's Communities



Population Structure

Gloucestershire's overall population is approximately 670,000 with 70% of residents living in the urban-classified areas with Cheltenham and Gloucester collectively home to approximately 39% of Gloucestershire's population.

Tables 2 and 3 present Gloucestershire's population by age group including 0-15 years old, 16 to 64 years old and over 65s.

Within Gloucestershire, 60.4% of the population are between 16 and 64 which is slightly lower than the national average. Around 22% of Gloucestershire's population is over 65 which is higher than the national average of 19%. By 2043 42% of households in Gloucestershire are projected to include someone aged 65+ compared to 33% of households in 2018.

Gloucester (16.9%) and Cheltenham (19.8%) have a lower proportion of residents aged 65 and over and a higher than national average of residents aged 0-15. Comparatively, Cotswold and the Forest of Dean have a much higher proportion of residents over 65 years old, 27.5% and 25.6% of the district's population.

The age structure in Stroud and Tewkesbury of 0-15 year olds generally reflects national patterns but with a slightly higher proportion of residents aged 16-64 and 65+.

People at different ages and life stages experience different transport needs and challenges. These needs are not uniform, as the distribution of age groups varies across the county. Transport infrastructure and services must be planned and delivered in a way which reflects these demographic and geographic differences, ensuring residents of all ages have inclusive access to services, amenities, and employment opportunities.

Table 2: Population by Broad Age Group

	0-15	16-64	65+
England	10,768,248	36,870,761	10,981,092
Gloucestershire	117,092	404,252	148,036
Cheltenham	21,139	76,476	24,124
Cotswold	14,419	52,068	25,174
Forest of Dean	14,424	52,360	22,969
Gloucester	26,459	88,748	23,391
Stroud	21,389	74,295	29,996
Tewkesbury	19,262	60,305	22,382

Table 3: Percentage of population by Broad Age Group

	0-15	16-64	65+
England	18.4%	62.9%	18.7%
Gloucestershire	17.5%	60.4%	22.1%
Cheltenham	17.4%	62.8%	19.8%
Cotswold	15.7%	56.8%	27.5%
Forest of Dean	16.1%	58.3%	25.6%
Gloucester	19.1%	64.0%	16.9%
Stroud	17.0%	59.1%	23.9%
Tewkesbury	18.9%	59.2%	22.0%

Source: Mid Year Population Estimates, England and Wales, 2024

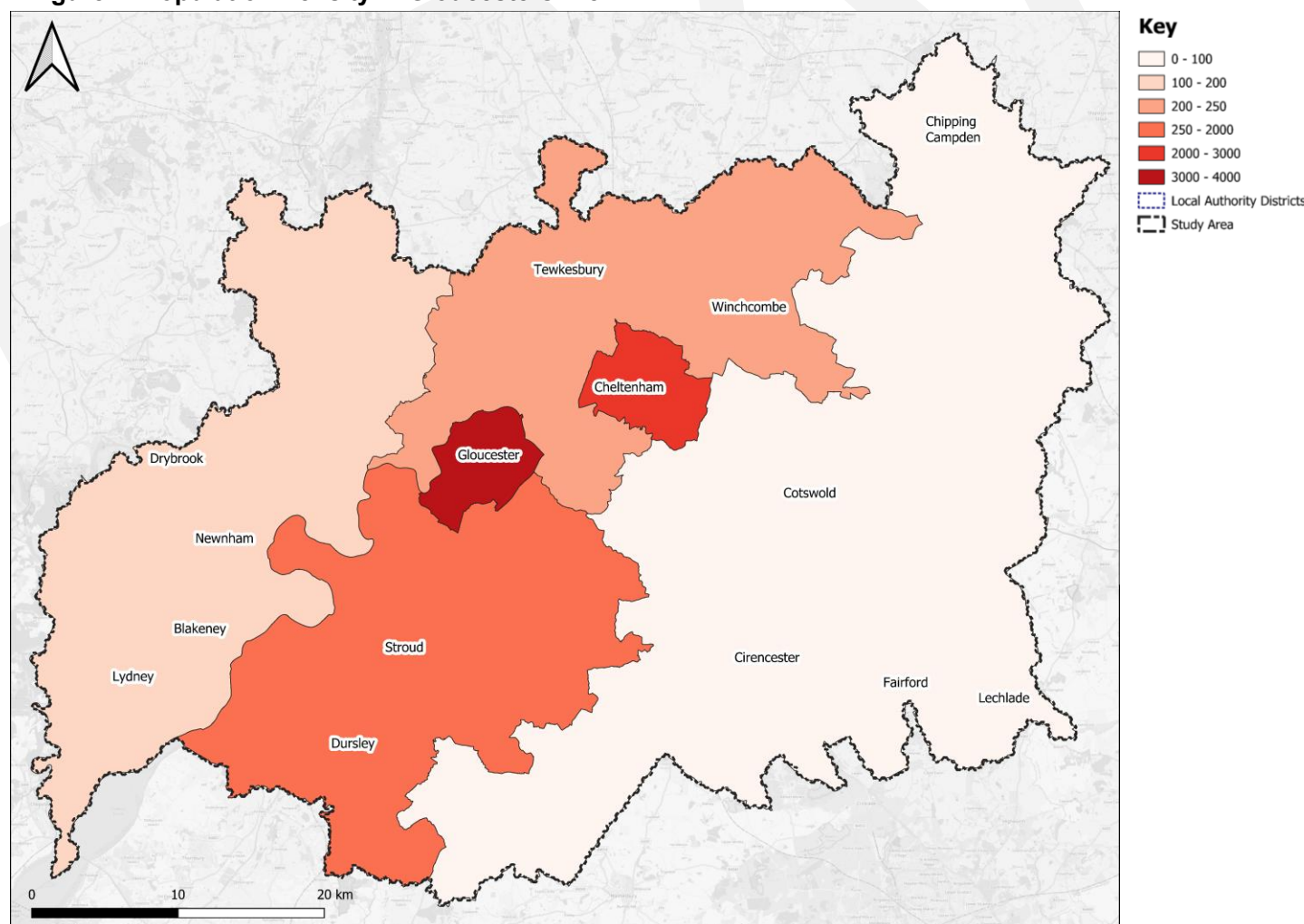
Population Density

Figure 7 presents the population density within Gloucestershire. The highest population density is concentrated in the urban areas of Gloucester and Cheltenham (3,418 and 2,613 people per km²). Gloucester is in the top 20% most densely populated district and unitary authorities across England and Wales.

In contrast, Cotswold and the Forest of Dean have a much lower population density per km² of 79 and 171 respectively. This reflects the more rural nature of these two districts. Stroud (273 people per km²) and Tewkesbury (246 people per km²) are approximately twice as dense as Forest of Dean and approximately three times more dense than Cotswold.

Population density is an important consideration in planning transport interventions, as it influences travel demand, service viability and the types of solutions that may be appropriate in different contexts. However, transport provision must respond to the specific needs of communities in both urban and rural locations. In higher-density areas, this may support more frequent or capacity-led interventions, while in lower-density areas there is often a greater need to ensure connectivity and accessibility over longer distances. As such, transport improvements should be targeted to reflect local travel patterns and needs, ensuring equitable access to opportunities across all parts of Gloucestershire.

Figure 7: Population Density in Gloucestershire



Source: Census 2021

Population Growth

The population increased by 12% between 2011 and 2024 in Gloucestershire as shown in Table 4. The rate of growth in Gloucestershire was higher than the national growth rate in England and Wales of 11%.

Across Gloucestershire, population growth was highest in Tewkesbury. The population increased by 24% between 2011 and 2024. Alongside being the district with the highest growth rate in Gloucestershire, Tewkesbury had one of the highest growth rates nationally. It was ranked 8th out of 331 district and unitary authorities in England and Wales in 2024 and saw the greatest growth out of all authorities in the South West.

In comparison Cheltenham experienced the smallest population growth across the districts in Gloucestershire, with the population increasing by 5% over the same time period.

As shown in Figure 8, between 2022 and 2047, all districts are projected to see a growth in their population.

Overall, it is anticipated that Gloucestershire’s population will increase by 17.5% between 2022 and 2047, with all districts expected to experience growth.

Notably, Cheltenham, Gloucester and Stroud are anticipated to experience significant population growth. In particular, Stroud is predicted to experience the highest growth in population between 2032 and 2047 to 150,522 people.

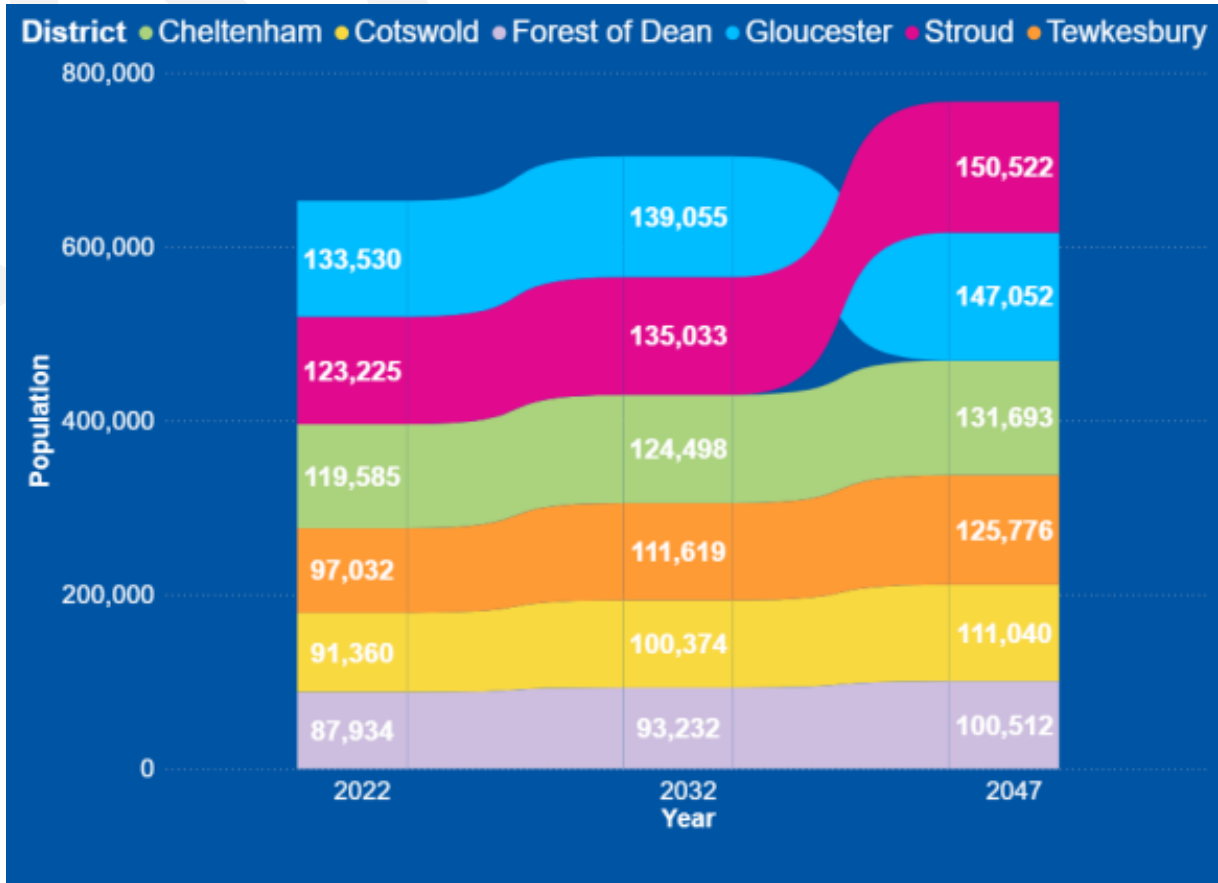
This projected growth will need to be supported by a vision-led approach to investment in transport infrastructure and services, ensuring that new development is aligned with sustainable transport objectives and contributes to wider sustainable development outcomes.

Table 4: Population Change 2011-2024

Year	2011 Population	2024 Mid Year Population	% Change
England	53,012,456	58,620,101	11%
Gloucestershire	596,984	669,380	12%
Cheltenham	115,732	121,739	5%
Cotswold	82,881	91,661	11%
Forest of Dean	81,961	89,753	10%
Gloucester	121,688	138,598	14%
Stroud	112,779	125,680	11%
Tewkesbury	81,943	101,949	24%

Source: Census 2011 and 2024 Mid Year Estimates

Figure 8: Population Growth by district 2022-2047



Source: Gloucestershire County Council

ACORN Data

ACORN classifies households and postcodes into groups and types based on socio-economic factors, lifestyle and housing characteristics. In Gloucestershire, the classification group with the highest proportion is Commuter-belt wealth (D), followed by Mature Success (F) as shown in Figure 9.

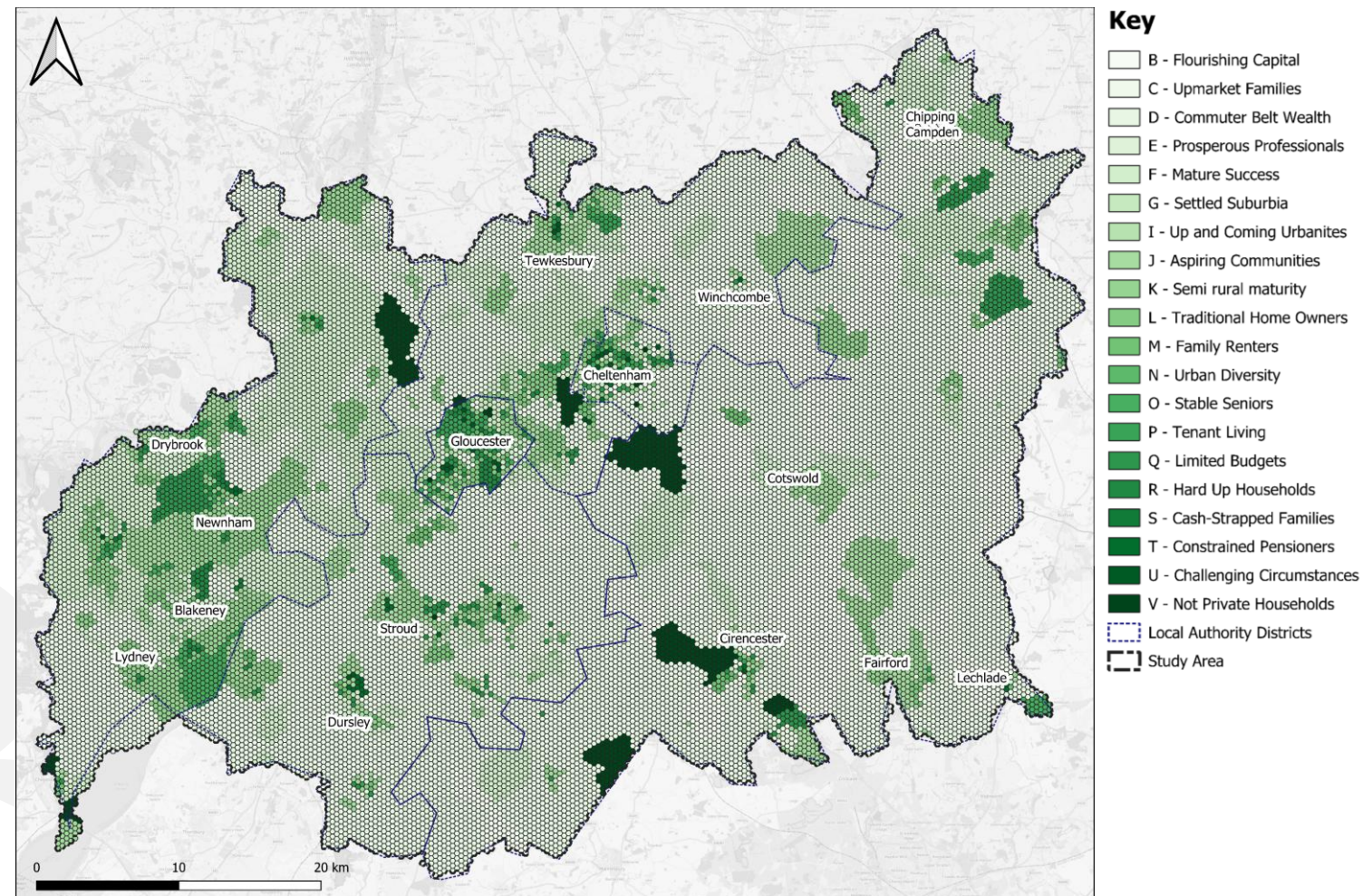
Commuter-belt wealth (D) is the most prominent category in Stroud (47%), Tewkesbury (45%), Cotswold (43%) and Cheltenham (26%) districts, representing empty nesters in detached houses near major cities, enjoying affluence and homeownership. Exclusive Addresses (A), Flourishing Capital (B), Metropolitan Surroundings (H) and Urban Diversity (N) are limited across Gloucestershire.

In Gloucester there is a more even spread of categories, with Mature Success (F), Traditional Homeowners (L) and Tenant Living (P) accounting for 12% each. In Cheltenham there is more of a mix of categories including pockets of categories such as Tenant Living (P), Settled Suburbia (G) and Hard-up Households (R).

In the Forest of Dean, Mature Success (F) accounts for 32% and Commuter-belt wealth (D) accounts for 27% of the population. Commuter-belt wealth (D) and Upmarket Families (C) dominate the Cotswold district.

Reflecting on the classifications in Gloucestershire it is clear that the majority of the rural areas in the county have high household incomes and are likely to own a car which is used for commuting and leisure purposes. The comparative wealth of the rural areas in Gloucestershire hides less affluent households in the county which may be more affected by isolation from employment opportunities, education, healthcare and other essential services.

Figure 9: ACORN Data in Gloucestershire



Source: ACORN

Indices of Multiple Deprivation

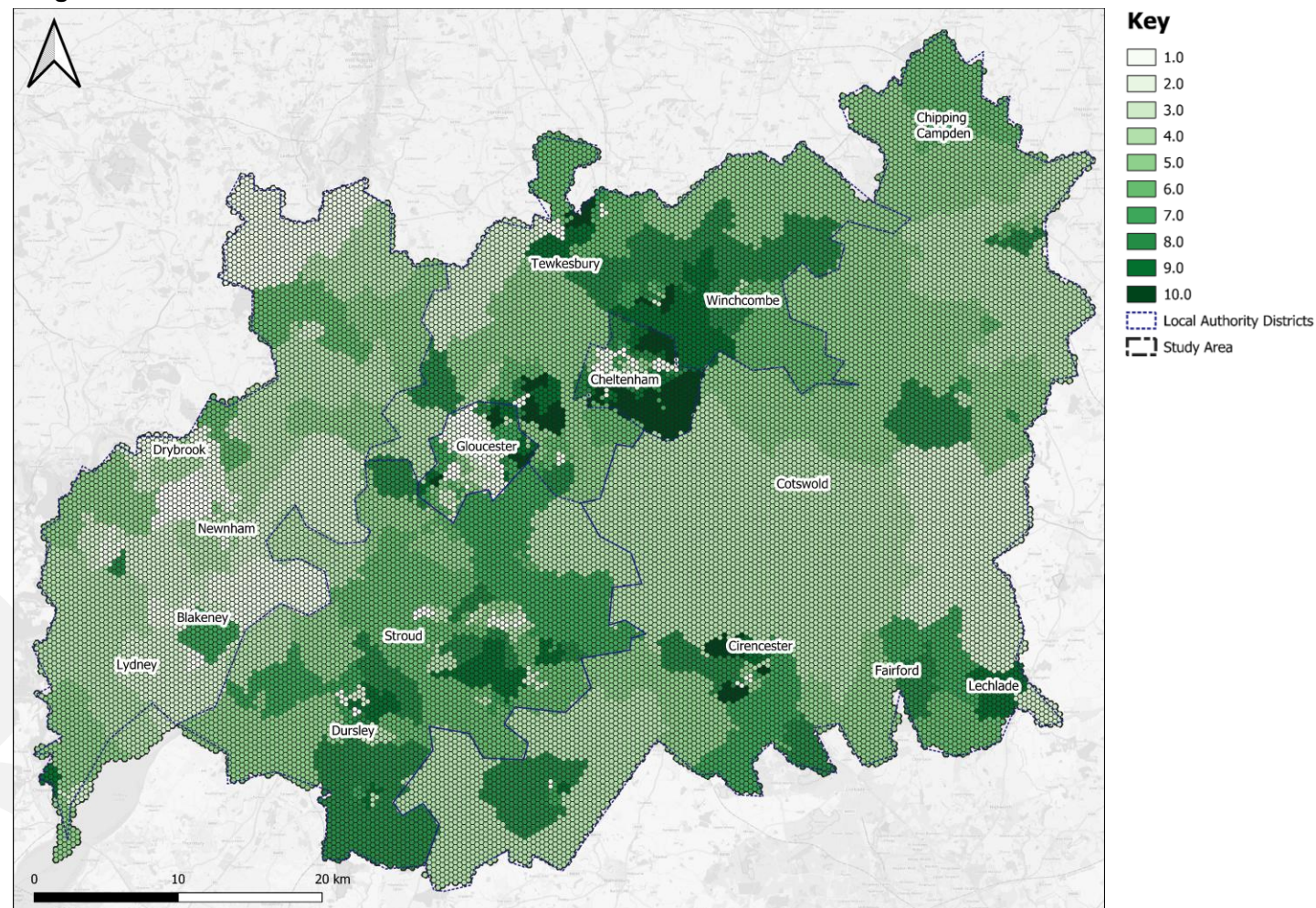
Indices of Multiple Deprivation (IMD) deciles divide areas into ten equal groups based on relative deprivation, ranging from most deprived to least deprived. The index draws on multiple domains, including income, employment, education, health, crime, barriers to housing and services, and the living environment. A lower decile (e.g. decile 1) indicates higher levels of deprivation, while a higher decile (e.g. decile 10) reflects relatively lower deprivation and better socio-economic conditions.

In Figure 10, 1 represents 10% most deprived and 10 represents 10% least deprived.

In Gloucestershire there are 39 wards which fall amongst the 10% most deprived in England. These areas are mostly located in the urban areas of Gloucester and Cheltenham, with the exceptions of Cinderford West and Lydney East in the Forest of Dean, Tewkesbury South, Dursley, Stonehouse and Stroud Slade in Stroud.

These wards with high levels of deprivation experience low income, unemployment, low educational attainment, poor health and housing. Therefore, access to affordable travel options such as active travel, public and community transport are essential to ensure these households have equal access to healthcare, education, employment and training.

Figure 10: IMD in Gloucestershire



Source: English Indices of Deprivation 2025

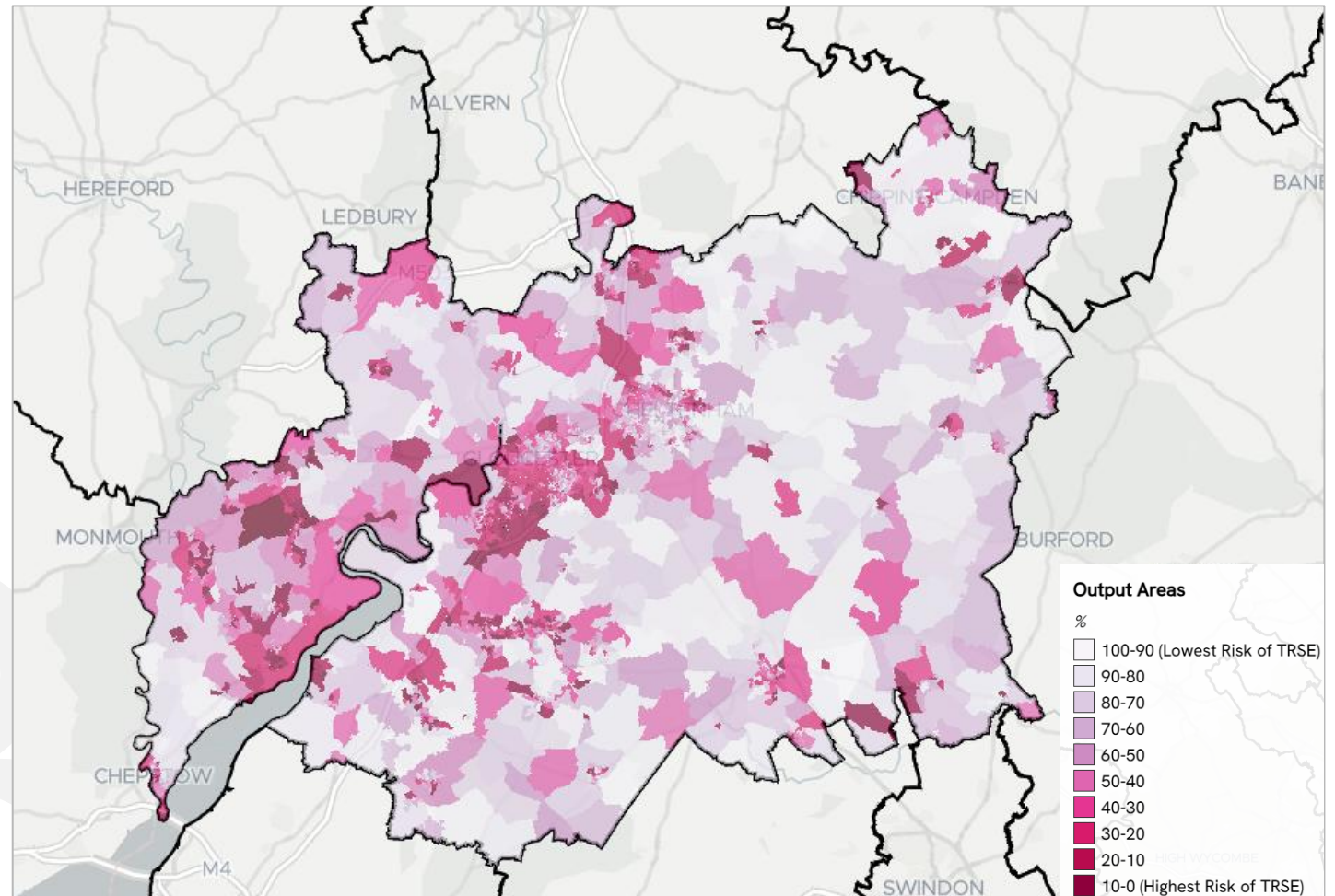
Transport Related Social Exclusion

Transport related social exclusion (TRSE) measures access to everyday places with the transport options available. It also measures the vulnerability of populations to social exclusion, through factors such as poverty, disability, caring responsibilities and poor health. It should be noted that approximately 12% of households in rural areas of Gloucestershire do not have access to a car.

Figure 11 presents the transport related social exclusion (TRSE) risk in Gloucestershire. In the county, 143,250 residents (21.4%) live in neighbourhoods with a nationally high risk of TRSE.

Table 5 sets out how TRSE varies between the districts in Gloucestershire. The Forest of Dean has the highest risk of TRSE at 38.9% compared to 5.4% in Cheltenham. The high risk of TRSE means that transport is limiting chances and participation and thereby needs to be enhanced to provide better access to key services and opportunities by sustainable modes.

Figure 11: Transport Related Social Exclusion in Gloucestershire



Source: Transport for the North

Table 5: TRSE Summary per district

	Risk of TRSE	
	Population at risk	% of population
Cheltenham	6,408	5.4%
Cotswold	15,390	16.9%
Forest of Dean	33,826	38.9%
Gloucester	30,997	23.4%
Stroud	32,245	26.6%
Tewkesbury	24,380	25.7%

Source: Transport for the North

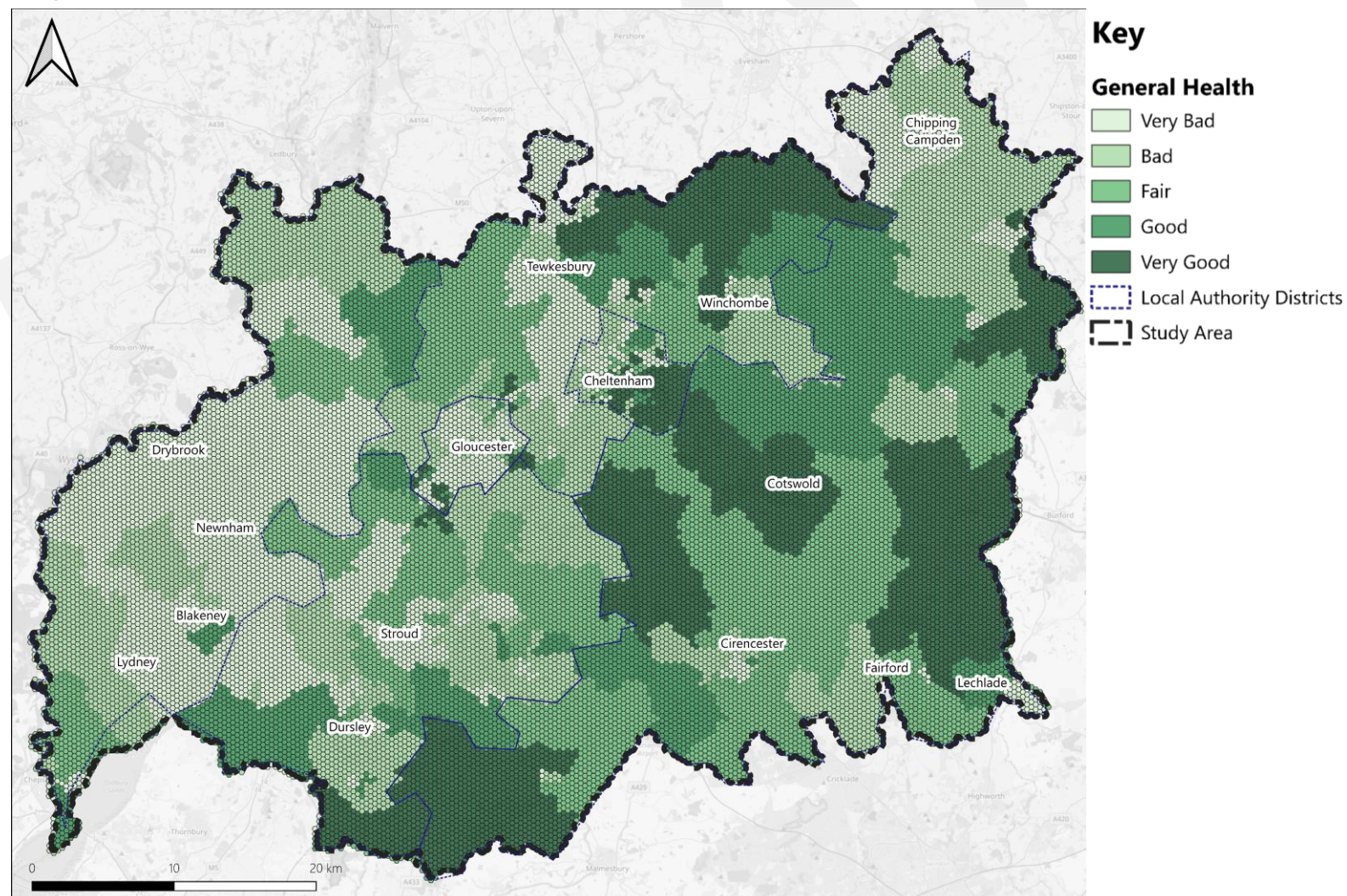
General Health

General health is a self-reported measure of overall health status collected from individuals as part of the UK 2021 Census and helps to capture how people perceive their own health to provide a high-level indication of the population's health and wellbeing.

Figure 12 shows the variation in perceived General Health across Gloucestershire but largely reflects the overall IMD patterns in the county. The Forest of Dean contains some of the county's most deprived communities, with a high number of individuals reporting very low levels of general health. Areas of very poor health are also observed in Gloucester, Cheltenham, Stroud and Tewkesbury. General health in Cheltenham and the Cotswold is overall relatively high with residents experiencing good health. This reflects the overall deprivation and neighbourhood characteristics and patterns in the district.

Provision of community transport and demand responsive transport to these areas with poor health will be essential to ensure these households have equal access to healthcare services when required. Further to this, connectivity to sustainable modes such as walking and cycling routes in the areas with poor health will help to encourage the integration of physical activity into daily lives, improving health and wellbeing for these residents.

Figure 12: General Health in Gloucestershire



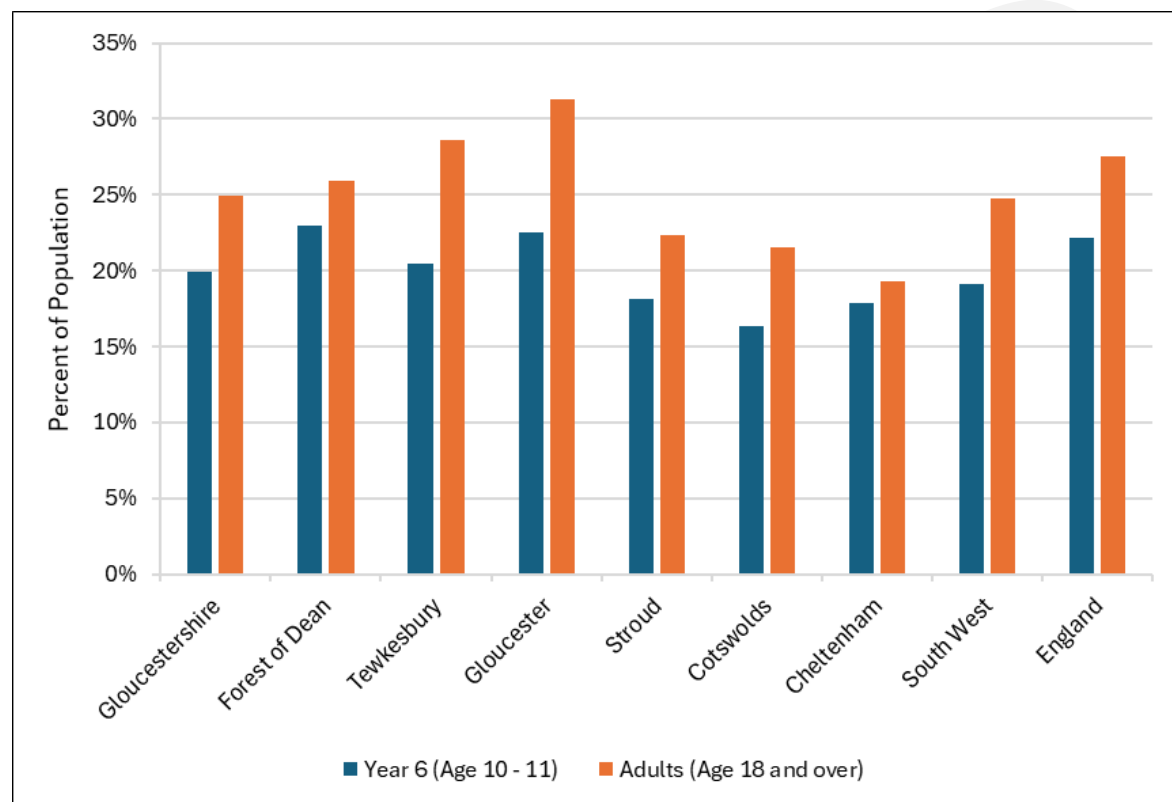
Obesity Levels

In 2023 and 2024, 24.9% of Gloucestershire's adult population was categorised as living with obesity (Figure 13). This is in-line with the regional average (24.8%) and slightly lower than the national average (22%). Within Gloucestershire, Gloucester has the highest obesity rate at 31.3%, while Cheltenham has the lowest at 19.3%.

Obesity within children aged 10 to 11 (Year 6) demonstrates similar trends to that of adults. Between 2023 and 2024, 19.9% of Gloucestershire's Year 6 population was classed as living with obesity. This is marginally higher than the regional average (19.1%) and slightly lower than the national average (27.7%). Within Gloucestershire, Gloucester and the Forest of Dean have the highest obesity rates of children aged 10 to 11 at 22.5% and 23%, respectively, while the Cotswolds has the lowest at 16.3%.

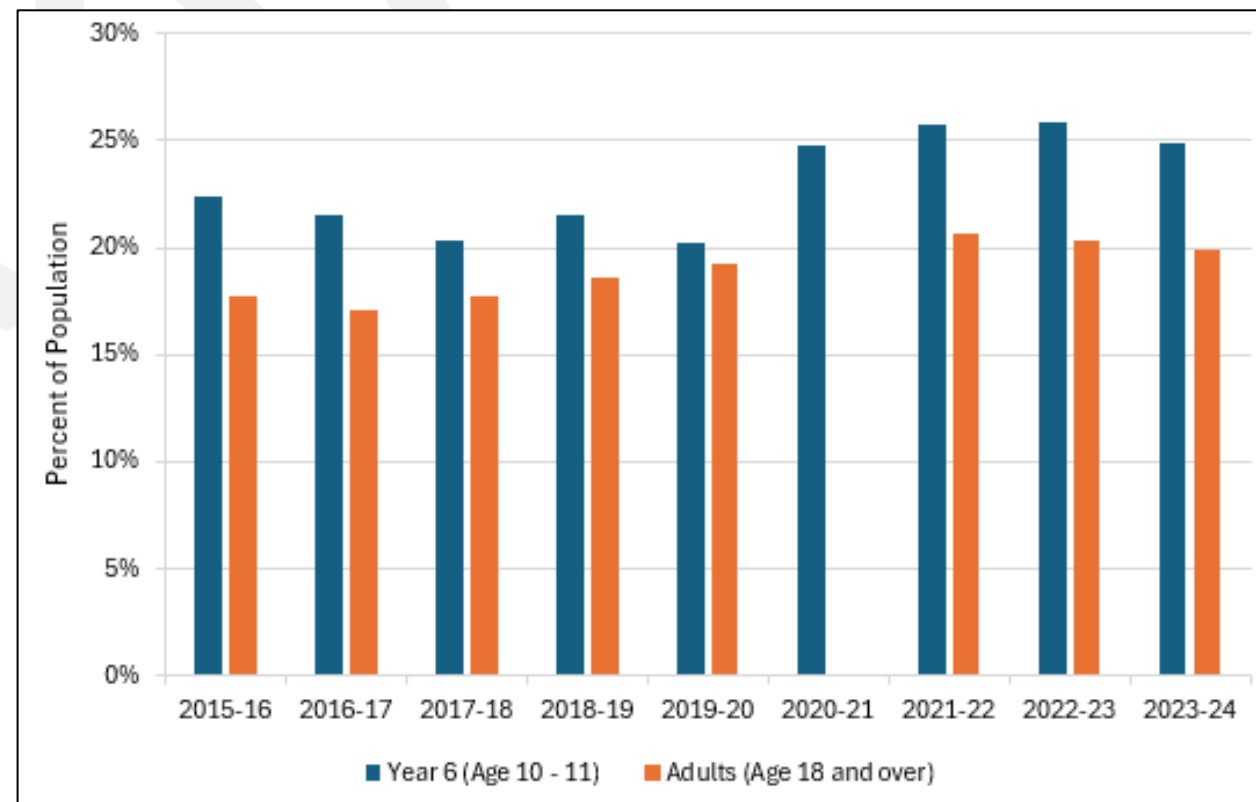
Figure 14 demonstrates that, overall, obesity rates among both age groups in Gloucestershire have seen a general upward trend from 2015/16, albeit with variation between years and some indications of a downward trend in the latter years of the dataset. This suggests obesity remains a persistent public health issue locally, while disparities in obesity rates between districts highlights the need for targeted interventions. Rising obesity rates underscore the importance of promoting and providing active travel options to encourage healthier lifestyles in Gloucestershire.

Figure 13: Percentage of Adults and Year 6 classified as living with obesity by district



Source: Office for National Statistics, 2023/24

Figure 14: Percentage of Adults and Year 6 classified as living with obesity by Year



Source: Office for National Statistics

Community Cohesion

Community Cohesion is a self reported measure undertaken by the Department for Culture, Media and Sport (DCMS) in a Community Life Survey. Community cohesion describes the extent to which people feel connected to, included within, and part of their local community. It reflects factors such as neighbourhood belonging, social relationships, trust between residents, and participation in community life. Higher levels of community cohesion can contribute to improved wellbeing, stronger social support networks, and more resilient communities.

Table 6 presents the community cohesion results for Gloucestershire’s districts from the 2024/25 survey. The data shows that residents across Gloucestershire generally report a strong sense of belonging to their local neighbourhoods. The highest estimated levels of belonging are recorded in Tewkesbury and Cotswold, at approximately 72% and 71% respectively, followed by Forest of Dean and Stroud at around 68%. Levels are lower in the county’s more urban districts, with approximately 61% of adults in Cheltenham and 60% in Gloucester, however, still convey a strong sense of local belonging. This suggests that feelings of neighbourhood belonging are broadly positive across the county but are slightly stronger in more rural districts than in Gloucester and Cheltenham.

Table 6: Community Cohesion

District	Lower estimate	Upper estimate	Approx. midpoint
Cheltenham	56%	66%	61%
Cotswold	65%	76%	71%
Forest of Dean	63%	73%	68%
Gloucester	54%	65%	60%
Stroud	63%	73%	68%
Tewkesbury	67%	77%	72%

Source: DCMS Community Life Survey 2024/25

Understanding Gloucestershire's Economy

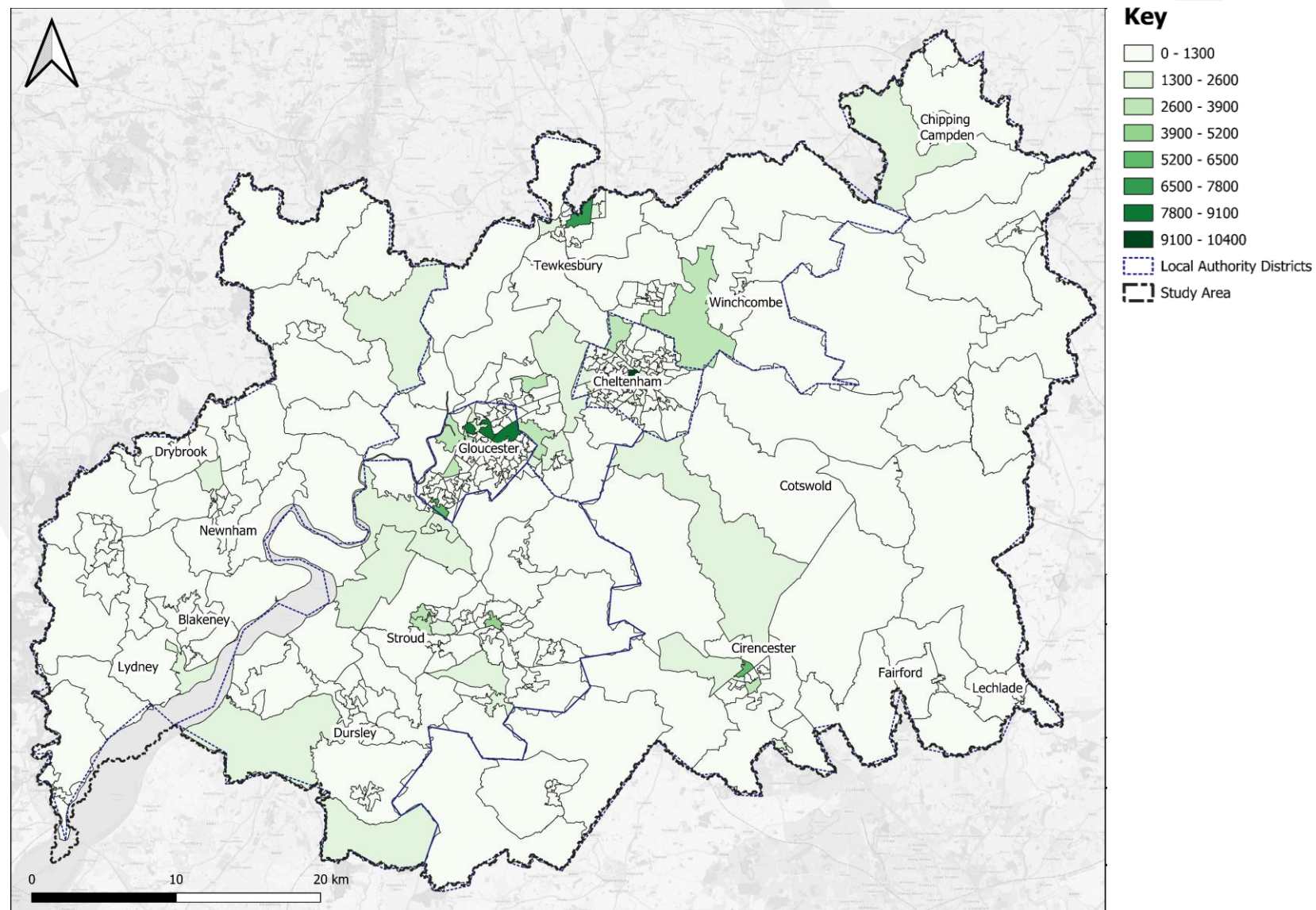


Number of Employees

The number of employees within Gloucestershire varies across the districts as shown in Figure 15. Gloucester and Cheltenham have the highest number of employees (68,475 and 64,905 people), followed by Stroud (49,840 people), Tewkesbury (48,790 people) and Cotswold (45,525 people) while Forest of Dean has the lowest (23,515 people). This aligns to the location of key employers in Gloucester and Cheltenham including Gloucester Business Park, GCHQ, Gloucestershire Royal Hospital, Gloucestershire County Council, UCAS, GE Aviation and Safran.

Reliable, frequent and high quality transport connectivity into key areas of employment such as Gloucester and Cheltenham is essential to ensure all residents have equal access to economic opportunities in Gloucestershire.

Figure 15: Number of Employees in Gloucestershire



Source: ONS NOMIS

Employment Sectors

Gloucestershire has a diverse and well-balanced economy, supporting employment across a broad range of industries. As shown in Figure 16, Public and Community Services is the county's largest employment sector, accounting for 25% of all jobs. This reflects the important role that healthcare, education and public administration organisations play as major employers, providing essential services to local communities across the county.

Manufacturing and Construction is the second largest sector, representing 16% of employment. This highlights Gloucestershire's strong industrial heritage and the continued importance of engineering, advanced manufacturing and construction activities in supporting economic growth and investment.

Retail (14%) and the Visitor Economy (13%) also make a significant contribution to employment. These sectors support a wide range of jobs across Gloucestershire's market towns, city centres, visitor attractions and hospitality businesses, reflecting the county's role as both a service centre for residents and an attractive destination for visitors.

Additionally, the Knowledge and Technology (13%) and Business Services (12%) industries account for approximately one quarter of all employment, demonstrating the growing importance of professional services, digital industries, innovation-led businesses and high-skilled occupations within the local economy.

In comparison, Rural Economy and Land-Based Industries, including agriculture, forestry and mining, account for a relatively small proportion of employment (4%). However, despite their smaller share of jobs, these sectors remain important contributors to Gloucestershire's rural character, landscape management and local economy, particularly within the county's more rural communities.

Table 7 defines the employment sectors which make up each employment industry, presented in Figure 16.

Figure 16: Employment Industries in Gloucestershire (%)

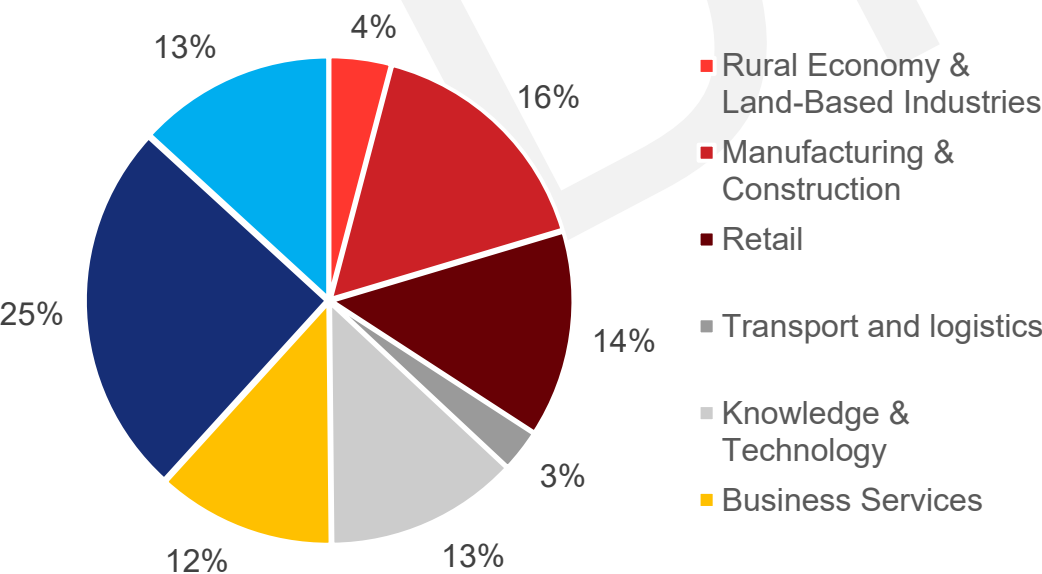


Table 7: Sectors within each employment industry

Employment Sector	Definition
Rural Economy & Land-Based Industries	Agriculture, forestry & fishing; Mining, quarrying & utilities
Manufacturing & Construction	Manufacturing; Construction
Retail	Retail; Motor trades; and wholesale.
Transport and logistics	Transport and storage
Knowledge & Technology	Information and communication; Professional, scientific & technical
Business Services	Financial & insurance, Property, Professional, scientific & technical, Business administration & support services
Public & Community Services	Public administration & defence, Education, and Health.
Visitor Economy	Accommodation & food services; Arts, entertainment & recreation

Source: BRES, ONS

Employment Sectors

Employment vs Unemployed

In 2025, Gloucestershire had around 327,600 people in employment, of which approximately 15% were self employed, as presented in Table 8. This is consistent with the employment average for the South-West, however higher than the employment average for the UK. Unemployment in the county remains relatively low at 3%, lower than the average for the UK.

Home working is also a notable feature of Gloucestershire’s labour market, with Census 2021 data indicating that just under one-third of workers mainly worked at or from home, although this should be interpreted with caution as the Census was undertaken during the COVID-19 pandemic.

Table 8: Working age population (16-64) in employment in Gloucestershire (2025)

Sector	Gloucestershire (employee jobs)	Gloucestershire (%)	South West (%)	UK (%)
Economically active	336,400	50%	82%	79%
In employment	325,500	97%	79%	76%
Employees	274,400	82%	67%	66%
Self employed	51,100	15%	11%	9%
Unemployed	8,800	3%	5%	5%
Economically inactive	70,600	18%	18%	21%

*totals may add to over 100% due to decimal rounding
 Source: ONS annual population survey

Employment Sectors

Employers by Size

Gloucestershire is home to nearly 29,000 businesses, the vast majority of which are small and medium-sized enterprises (SMEs). Table 9 shows that micro-businesses, employing fewer than 10 people, account for 89% of all businesses, and reflect the proportion across the South-West. A further 9% are small businesses employing 10 to 49 people, while 2% are medium-sized businesses employing 50 to 249 people. Large employers, with more than 250 employees, are relatively rare and account for just 0.4% of all businesses.

Table 10 shows how business size varies across different sectors. Micro-businesses dominate every sector, particularly within the Rural Economy and Land-Based Industries, where they account for 95% of businesses, and the Knowledge and Technology sector, where they represent 93%. The Visitor Economy and Retail sectors have the highest proportions of small businesses, reflecting a diverse mix of local employers. In contrast, Public and Community Services has a greater proportion of medium-sized and large organisations, reflecting the presence of larger employers such as schools, healthcare providers and public sector organisations.

Table 9: Businesses by size in Gloucestershire and the South West

Enterprises	Gloucestershire (counts)	Gloucestershire (%)	South-West (counts)	South-West (%)
Micro (0 to 9)	25,625	89%	209,495	89%
Small (10 to 49)	2,695	9%	21,405	9%
Medium (50 to 249)	510	2%	3,635	2%
Large (250+)	110	0.4%	780	0.3%
Total	28,940	-	235,320	-

Source: Inter Departmental Business Register (ONS)

Table 10: Distribution of businesses by size by employment industry

Sector	Micro (0-9 employees)	%	Small (10-49 employees)	%	Medium-sized (50 to 249 employees)	%	Large (250+ employees)	%	Total Businesses
Rural Economy & Land-Based Industries	2,100	95%	105	5%	10	0%	5	0%	2,220
Manufacturing & Construction	5,010	89%	470	8%	105	2%	25	0%	5,610
Retail	3,295	87%	405	11%	60	2%	10	0%	3,780
Transport and logistics	725	91%	70	9%	10	1%	0	0%	800
Knowledge & Technology	6,095	93%	390	6%	85	1%	10	0%	6,570
Business Services	3,770	91%	290	7%	60	1%	15	0%	4,140
Public & Community Services	1,460	74%	365	19%	110	6%	35	2%	1,970
Visitor Economy	3,165	82%	605	16%	70	2%	10	0%	3,845
Total	25,620	89%	2700	9%	510	2%	110	0.4%	28,935

Source: Inter Departmental Business Register (ONS)

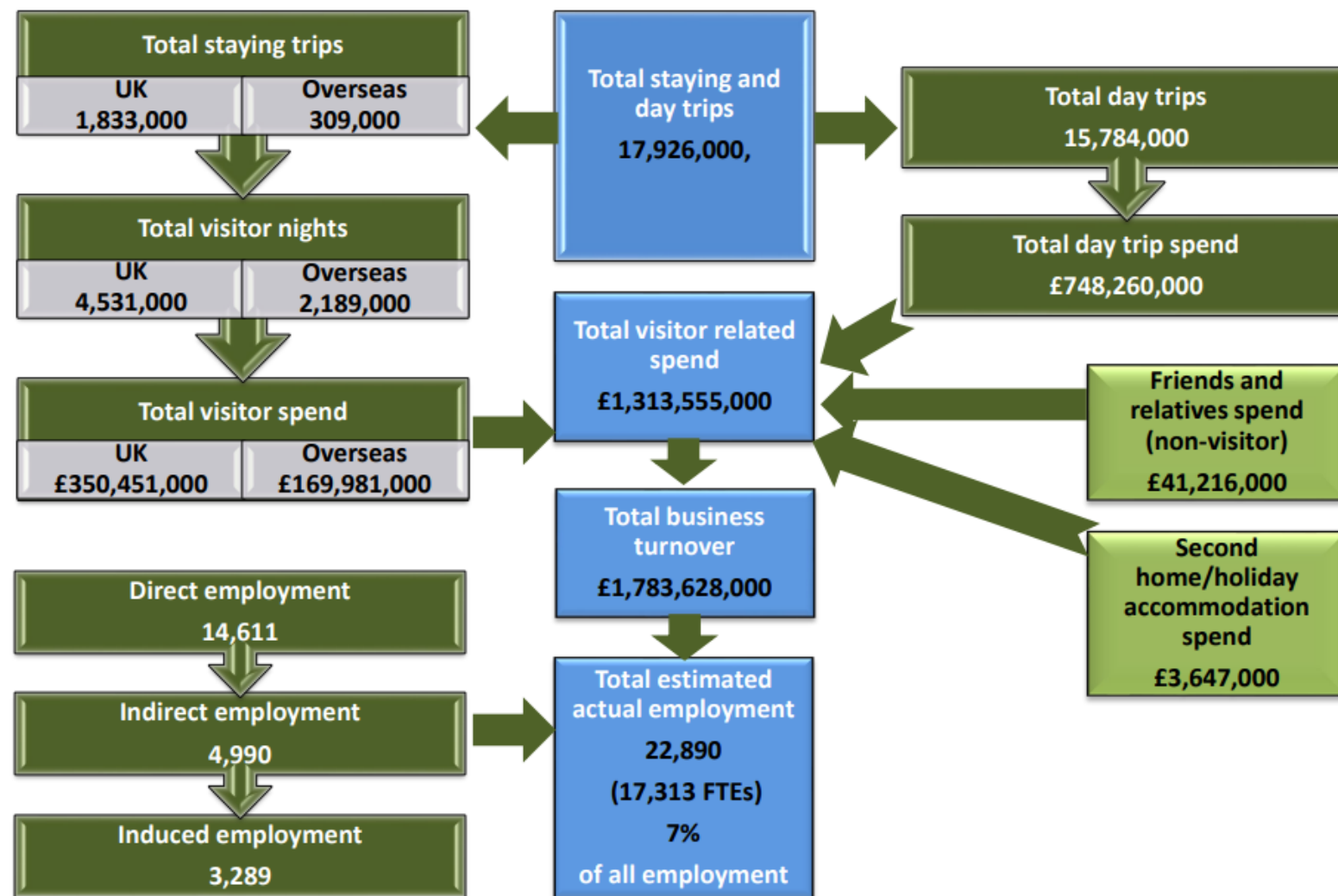
Employment Sectors

Visitor Economy and Tourism

Tourism plays an important role in Gloucestershire's economy, helping to support local businesses, jobs and communities across the county. In 2024, Gloucestershire attracted around 17.9 million visitor trips, generating approximately £1.31 billion in visitor spending and supporting an estimated 22,890 jobs, equivalent to around 7% of all employment in the county, as presented in Figure 17.

Visitors are drawn to Gloucestershire's diverse mix of cities, market towns, landscapes and attractions. Popular destinations include the Cotswolds National Landscape, the Forest of Dean, Cheltenham, Gloucester and a range of historic market towns. The visitor economy supports a wide range of sectors, including accommodation, hospitality, retail, transport, culture and leisure, and is strengthened by attractions such as Gloucester Cathedral, the Cheltenham Festivals, heritage sites, outdoor recreation opportunities and the county's distinctive natural environment.

Figure 17: Gloucestershire Tourism Key Facts



Source: The Economic Impact of Gloucestershire's Visitor Economy 2024

Understanding Gloucestershire's Environment

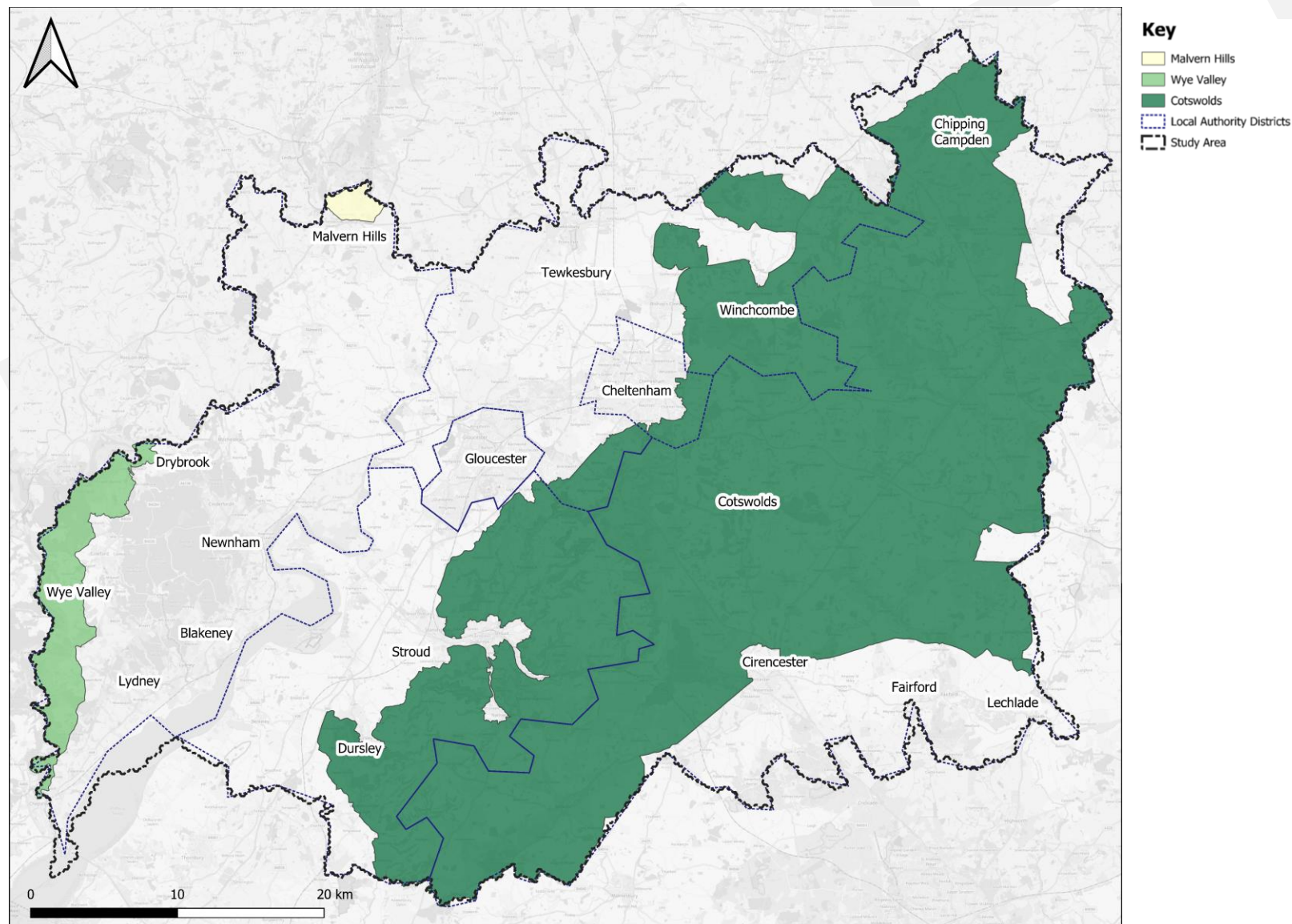


Landscape Designations

Landscape designations in Gloucestershire are presented in Figure 18. The county features several landscape designations including the Cotswolds National Landscape covering the east and the Wye Valley National Landscape in the west. The Cotswolds National Landscape extends across a number of neighbouring authorities, including parts of Oxfordshire, Worcestershire, Warwickshire and Wiltshire, while the Wye Valley National Landscape extends into Herefordshire and Monmouthshire.

The Cotswolds National Landscape was designated in 1966 and covers 790 square miles. It is the biggest national landscape in the UK. The Wye Valley was designated in 1971 to protect the limestone gorges and native woodlands, geology, wildlife and a wealth of history. The Malvern Hills are located at the northern tip of the county, adjacent to Worcestershire.

Figure 18: Landscape Designations in Gloucestershire



Source: MAGIC

Air Quality Management Areas

Several Air Quality Management Areas (AQMAs) were declared in Gloucestershire between 2005 and 2020 due to nitrogen dioxide exceeding safe levels. However, many of these AQMAs have since been revoked after achieving compliance, as detailed in Table 11. The only remaining AQMA in the county is in Birdlip, Cotswold district, at the Air Balloon roundabout connecting the A417 and A436, where persistent congestion and a high proportion of heavy goods vehicles continue to contribute to elevated emissions. However, revocation of the AQMA at this site is anticipated following the completion of the Missing Link construction works

Despite the revocation of most AQMAs, air quality remains a key consideration. A comprehensive monitoring network is maintained across Gloucestershire, with approximately 169 monitoring sites distributed across the districts to track pollutant concentrations on an ongoing basis. This provides an important evidence base to identify emerging issues, assess trends over time, and inform targeted interventions.

Air Quality will continue to be monitored, and where necessary, targeted transport interventions can be implemented to address local air quality issues. These may include measures to reduce traffic demand and congestion, promote active travel and public transport, and improve network efficiency to support smoother traffic flows and reduce vehicle emissions. It should be noted that direct user transport emissions are the largest source of carbon emissions in Gloucestershire, accounting for 1.38 MtCO₂e in 2023.

Table 11: Historic AQMA Locations

	AQMA Declared	AQMA Revoked
Cheltenham		
Cheltenham Borough Council	15/09/2020	26/08/2025
Cotswold		
Thames Street, Lechlade	02/04/2014	08/05/2024
Birdlip	08/04/2008	N/A
Forest of Dean		
Lydney	01/07/2010	19/01/2026
Gloucester		
Barton Street	08/08/2005	03/12/2025
Priory Road	08/08/2005	03/12/2025
Painswick Road	05/10/2007	05/12/2025
Tewkesbury		
Tewkesbury Town Centre	05/12/2008	01/08/2022

Source: Defra

Flooding

Gloucestershire is prone to surface water flooding, tidal and river flooding due to its network of rivers and tributaries, such as the River Severn.

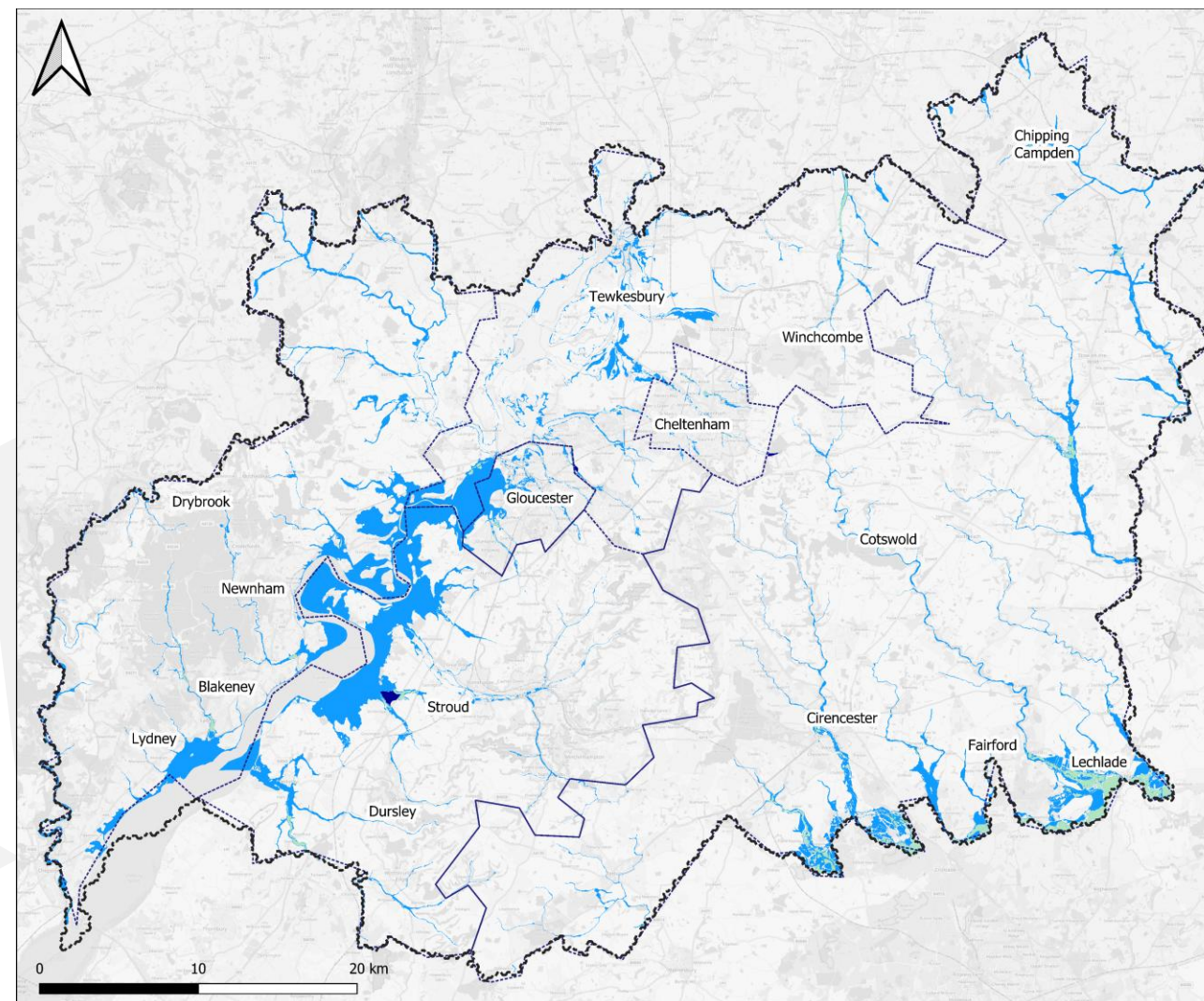
The distribution of flood risk zones across the county are presented in Figure 19. It shows that the greatest concentrations of Flood Zones are located along the Severn and Frome valleys between Stroud and Gloucester, reflecting the influence of the River Severn floodplain and its wide, low-lying valley. Further areas of elevated flood risk are evident moving north towards Gloucester and Tewkesbury, where the confluence of major rivers creates additional flood-prone corridors, as well as smaller pockets of risk distributed across the county.

Gloucestershire has experienced notable flooding events historically, such as the 2007 floods, which have led to network closures, severed communities and significant impacts on journey reliability and emergency access. As a largely rural county with dispersed settlements, the resilience of a limited number of strategic routes is particularly important, meaning that flooding at key points can have disproportionate impacts on accessibility and economic activity.

Climate change is expected to exacerbate flood risk across Gloucestershire further, with projections indicating an increase in the frequency and intensity of heavy rainfall events. This is likely to increase both the extent and duration of surface water and fluvial flooding, including in areas not currently designated within higher flood zones. Consequently, transport assets that are already exposed to flood risk, particularly within the Severn corridor and low-lying urban areas such as Gloucester and Tewkesbury, may experience more frequent disruption, while new risks may emerge elsewhere on the network.

Proactive action must be taken to enhance transport resilience within the county, such as prioritising investment in highway drainage, flood alleviation and asset protection measures, as well as embedding climate adaptation into the design of new infrastructure. Incorporating these measures alongside ongoing monitoring and maintenance will ensure Gloucestershire's transport network remains reliable and adaptable in the face of increasing flood risk driven by climate change.

Figure 19: Flood Zones in Gloucestershire



Source: UK Gov Data

Carbon

User carbon emissions

Transport is the largest source of carbon emissions in Gloucestershire, accounting for 1.38 MtCO₂e in 2023, which equates to 42% of the county's total emissions. However, around one-third (33%) of these emissions arose from through-trips (journeys which pass through the county without starting or ending within it), meaning they have limited potential to be influenced by local transport interventions delivered by GCC.

Key characteristics of user emissions are shown in Figures 20 to 23, which :

- Emissions are dominated by car travel, with a notable contribution from freight.
- Longer distance trips are a significant source of emissions, with 40% arising from journeys over 25 miles, compared to just 14% from trips under 5 miles.
- Business and commuting trips are major contributors, accounting for 66% of total emissions.
- Spatially, emissions are broadly split evenly between urban and rural areas, although the underlying drivers differ.

Looking ahead, future emissions are expected to reduce due to vehicle electrification, as displayed in Figure 24. However, the rate of electrification remains uncertain. Under the 'Accelerated Zero Emission Vehicle (ZEV) uptake scenario', which is an ambitious pathway for decarbonisation in DfT's Common Analytical Scenarios (CAS), emissions could fall as much as 90% by 2045 relative to 2023 levels.

This pathway highlights a significant gap between a 'business-as-usual' trajectory, driven primarily by national policy and technological change, and the level of emissions reduction required to meet Net Zero targets. Electrification alone is unlikely to deliver emissions reductions at the pace or scale required to align with carbon budget trajectories or Net Zero by 2045. As such, there remains a critical role for local transport interventions, such as mode shift, demand reduction, and network optimisation to accelerate decarbonisation and close this gap.

Infrastructure carbon

GCC's highways maintenance and operations activities generated an estimate of 28,061 tCO₂e in the 2024/25 financial year. This excludes emissions associated with the construction of major projects.

While these emissions are relatively small compared to county-wide user emissions, they are material and largely within GCC's direct influence. The majority of infrastructure carbon arises from planned maintenance, as illustrated in Figure 25.

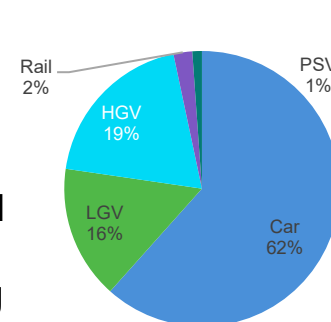


Figure 20: User emissions by vehicle type (2023)

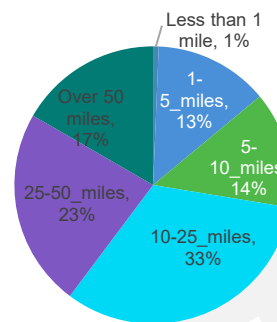


Figure 21: User emissions by trip length (2023)

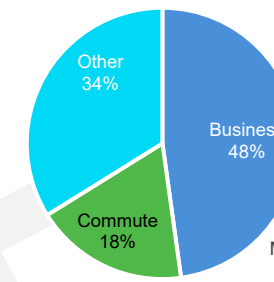


Figure 22: User emissions by journey purpose (2023)

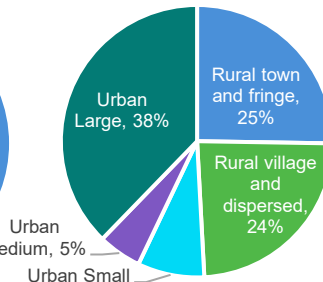


Figure 23: User emissions by place type (2023)

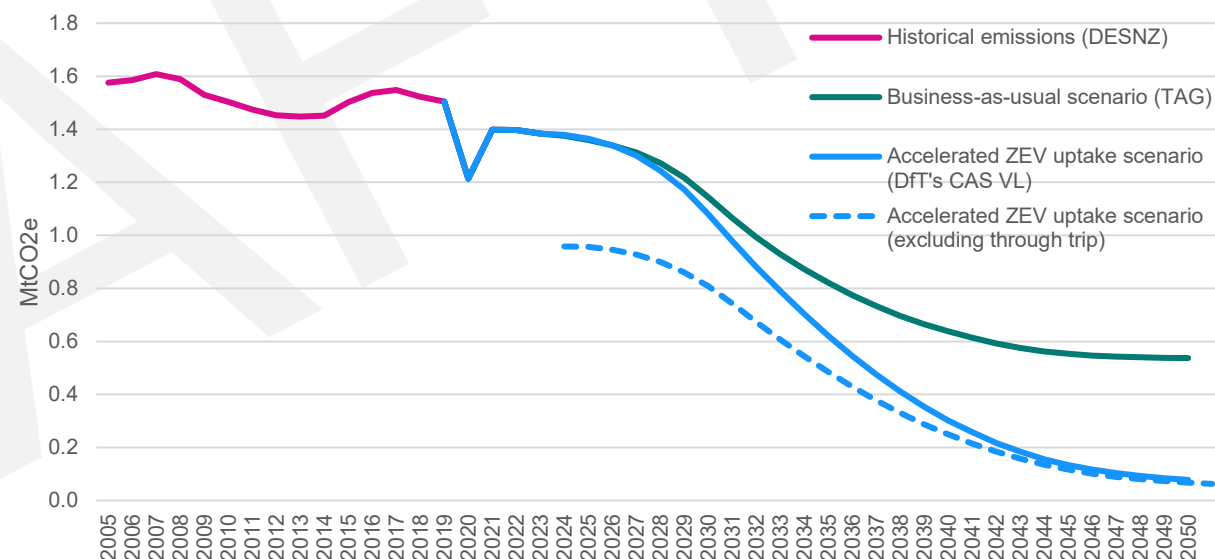


Figure 24: Forecast county-wide transport user emissions under Business-as-Usual and 'Accelerated EV uptake' scenarios

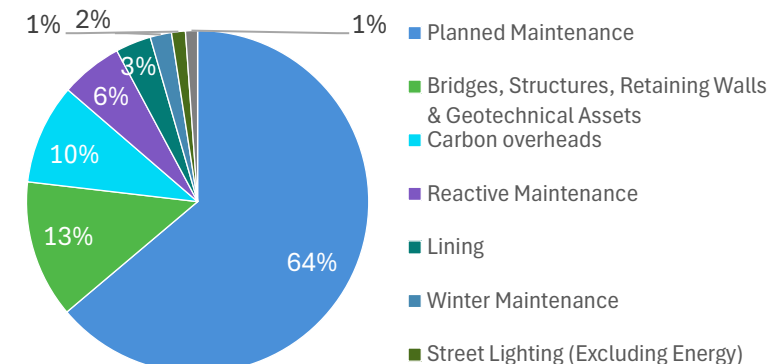


Figure 25: Infrastructure carbon emissions from highway maintenance and operations activities

Climate Resilience

The climate is already changing, and Gloucestershire's transport network is increasingly exposed to climate-related risks. Historical and recent events, such as the floods of 2007 and 2014 and the heatwaves of 2022 and 2025 have demonstrated how extreme weather can disrupt transport operations, increase network vulnerability, and create safety risks.

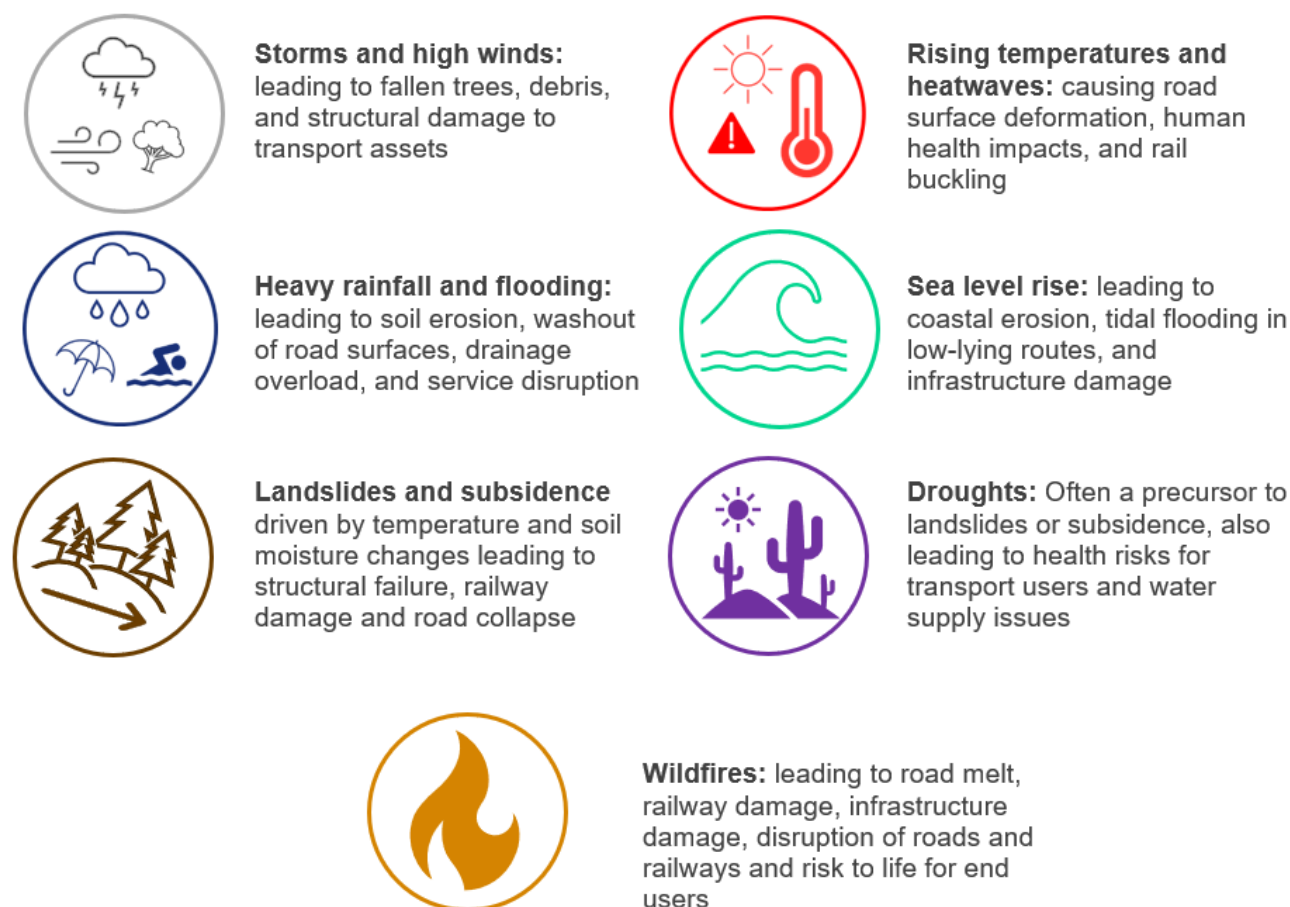
Gloucestershire's geography, and its location within the River Severn's drainage basin and proximity to the Severn Estuary, makes the county particularly vulnerable to flooding. Yet, projected warmer, wetter winters and hotter, drier summers are expected to increase the frequency and severity of flooding, extreme heat, storms, drought and associated cascading impacts. These risks affect transport modes differently, with roads particularly vulnerable to flooding, surface degradation and subsidence, and rail infrastructure exposed to earthwork failures, storm damage and service disruption.

The consequences of such events can be felt disproportionately by vulnerable communities, particularly those with limited mobility or transport options, and can undermine the achievement of wider transport objectives by reducing connectivity, accessibility, safety and network resilience.

As climate risks intensify, embedding adaptation and resilience within transport planning, asset management and investment decisions will be critical to ensuring the transport system remains safe, reliable and capable of supporting Gloucestershire's long-term economic, environmental and social ambitions.

Figure 26 presents an overview of the key climate-related hazards and their impacts to transport systems in Gloucestershire.

Figure 26: Key climate hazards affecting transport in Gloucestershire



Understanding Gloucestershire's Transport System and Travel



Overview

The travel demand and existing transport system which facilitate demand provides the background upon which this LTP will be developed. An understanding of current travel patterns in Gloucestershire, both spatially and by different modes, sets a baseline for identifying challenges and opportunities, and against which future change can be measured.

The following sections provide a detailed overview of the overall transport demand in Gloucestershire, focusing on aspects such as provision, usage, reliability and accessibility of each mode of transport. These elements collectively inform how Gloucestershire's transport system is currently performing and where improvements might be required.



Travel Demand

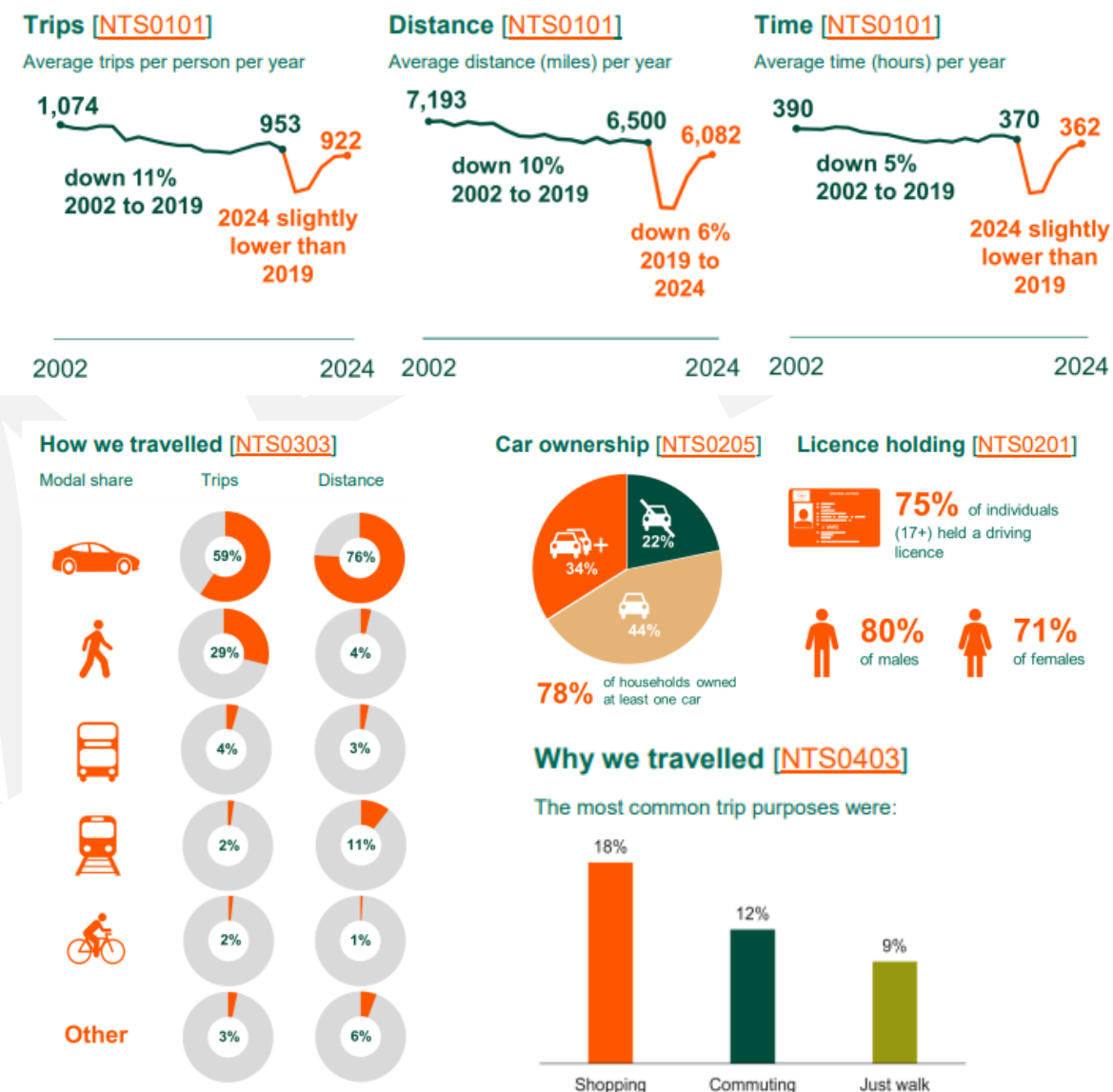
National Travel Survey

To provide an overall understanding of the typical level of national travel demand and patterns of change a summary of the National Travel Survey 2024 outcomes are set out below:

- On average people made 18 trips a week which was slightly lower than 2019 (immediately prior to the COVID-19 pandemic)
- People travelled an average of 6,082 miles in 2024 which was a 6% decrease from 2019
- In 2024, 25% of trips were under 1 mile, and 70% under 5 miles.
- 99.8% of walking journeys recorded were under 5 miles
- For trips over a mile, car was the most frequent mode of travel
- Around 60% of trips which used more than one mode began with walking
- The most common trip purpose was shopping (18% of journeys) and 12% of journeys were for commuting purposes
- 75% of residents aged 17 and over held a driving licence
- The South-West had the second highest proportion of residents using active transport modes (32%) compared to the other regions
- 14% of trips undertaken by people who live in rural areas were trip chains, compared to 11% by people who live in urban areas
- The most common type of chain trip journey (a series of consecutive trips made on a day by an individual) for people living in rural and urban areas was to shopping areas to other shopping areas and then to home (4.8% for rural residents and 4.6% for urban residents)

Figure 27 presents a summary of the key statistics from the National Travel Survey.

Figure 27: National Travel Survey Summary



Source: National Travel Survey, England 2024 Main Results

Travel Demand

National Travel Survey – Trips by Mode

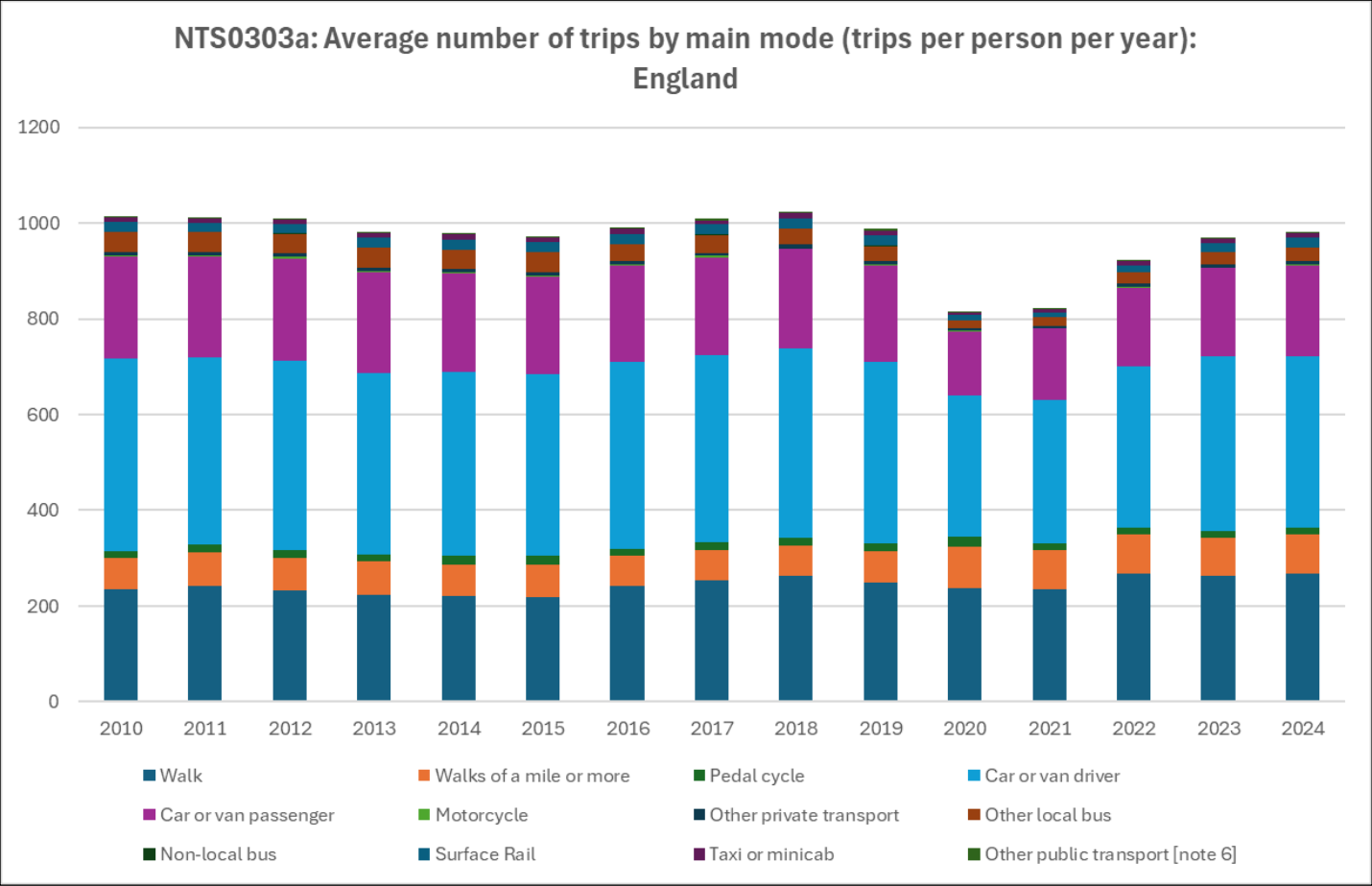
Among all modes of transport across England, the highest number of trips recorded are by ‘Car or van’, averaging approximately 300-400 trips per year, as displayed in Figure 28.

This is followed by short distance walking trips averaging approximately 200-300 trips per year, closely followed by car passenger.

The average number of trips by mode decreased significantly between 2020 and 2021, which can be attributed to the impact of the COVID-19 pandemic where travel was restricted across England. The average number of trips has started to recover and are generally trending towards pre-2020 levels.

Table 12 compares the number of trips by mode between 2010, 2019 and 2024. It shows a reduction in trips made by car or van and bus, however an increase in walking and rail between 2010 and 2024. Cycling has stayed the same.

Figure 28: Number of Trips by Main Mode in England



Source: National Travel Survey NTS0303a

Table 12: Number of Trips by Main Mode in England

Year	Walk	Walks of a mile or more	Pedal cycle	Car or van driver	Car or van passenger	Motorcycle	Other private transport	Bus in London	Other local bus	Non-local bus	London Underground	Surface Rail	Taxi or minicab	Other public transport	All modes
2010	234	65	15	402	212	3	7	25	42	1	9	19	9	2	982
2019	250	65	16	380	200	2	7	18	32	[low]	12	21	11	3	953
2024	267	81	15	357	189	2	8	13	28	[low]	10	21	9	2	922

Source: National Travel Survey NTS0303a

Travel Demand

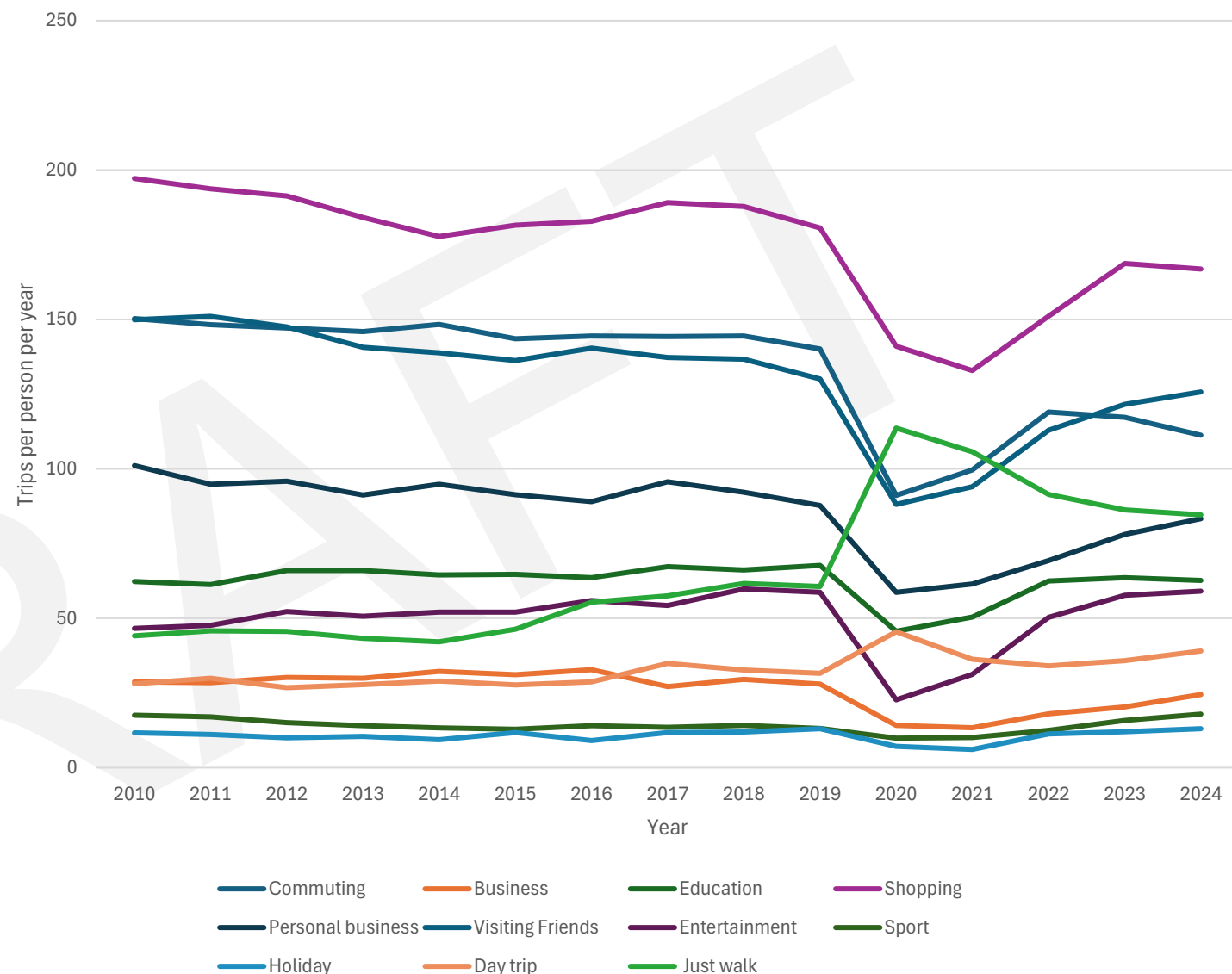
National Travel Survey – Trips by Purpose

Travel patterns in England have changed significantly over the last decade, particularly following the COVID-19 pandemic. As shown in Figure 29, most trip purposes experienced a sharp decline between 2019 and 2020 as restrictions reduced travel for work, education, shopping and leisure. Walking was the main exception, increasing during this period as more people spent time outdoors closer to home.

Shopping has consistently been one of the most common reasons for travel, although the number of shopping trips remains below pre-pandemic levels. Commuting and business travel also fell substantially during the pandemic and have recovered more slowly, reflecting the continued use of home and hybrid working.

By contrast, trips for visiting friends and family, leisure activities and personal business have recovered more strongly, indicating a greater return to social and recreational travel. Education trips fell sharply during periods of school closures but quickly returned to previous levels once restrictions were lifted. Overall, the data suggests that travel behaviour has changed since the pandemic, with fewer journeys made for work and more travel associated with social, leisure and everyday activities.

Figure 29: Trips by Purpose in England



Source: National Travel Survey NTS0303a

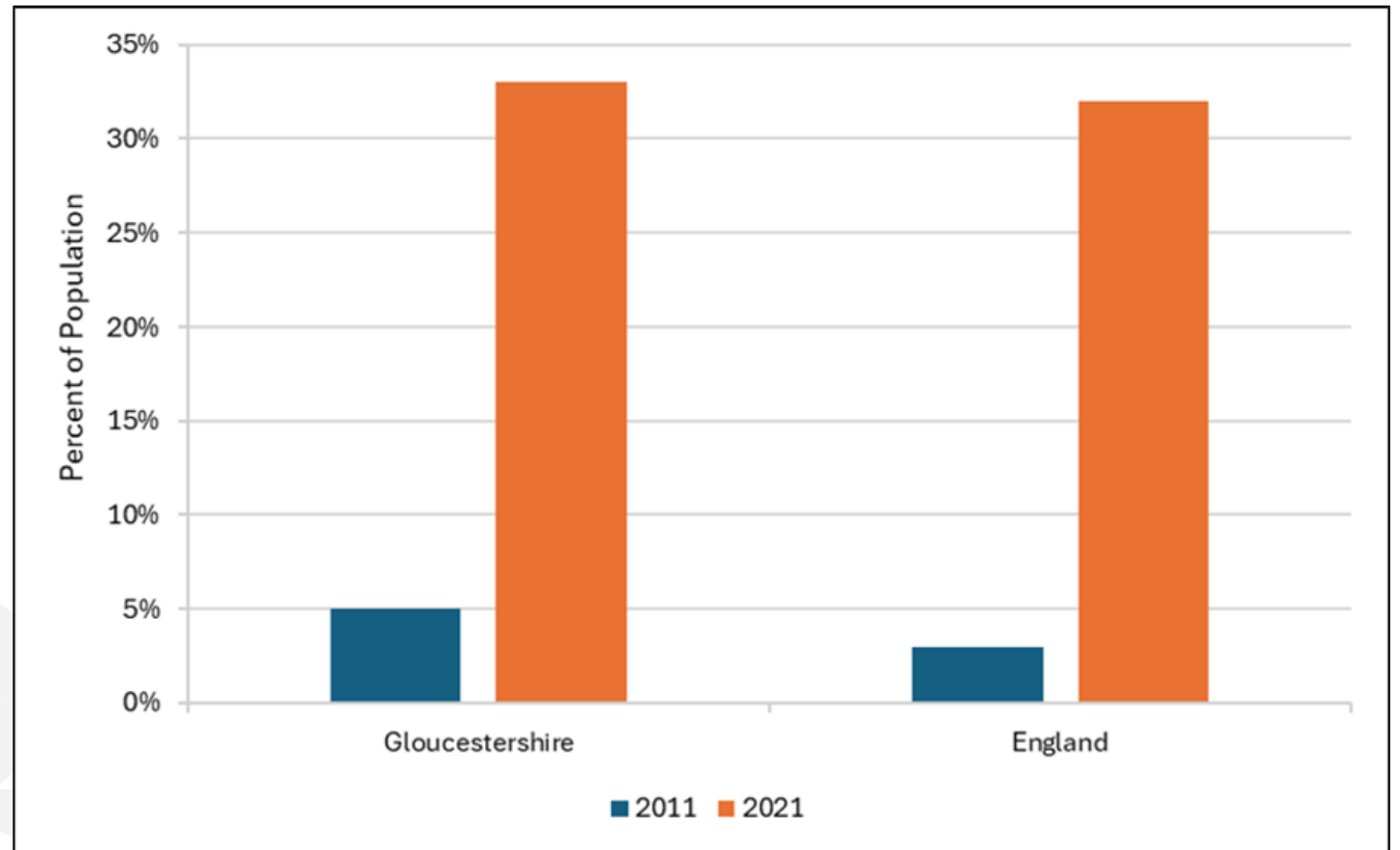
Gloucestershire Travel Patterns

Mode of Travel to Work

Census Mode of Travel to Work data provides a basis for presenting mode split across an area. To assess mode of travel to work in Gloucestershire, Census 2021 data has been used with the caveat that it was collected during the COVID-19 pandemic and may not reflect typical travel behaviour. In particular, higher levels of home working and reduced public transport use mean the results may not fully reflect travel patterns in 2026. While the data should therefore be interpreted with caution, it remains the most robust and comprehensive county-wide baseline available to assess transport demand.

In 2021, 33% of the working population in Gloucestershire mainly worked at home as shown in Figure 30. This rose from 5% in 2011, due to the COVID-19 pandemic and the travel restrictions that were in place. In both years, levels of working from home in Gloucestershire are broadly consistent with the national average.

Figure 30: Working from Home in 2011 and 2021



Source: Census 2011: QS701EW – Method of travel to work; Census 2021: TS061 - Method used to travel to work

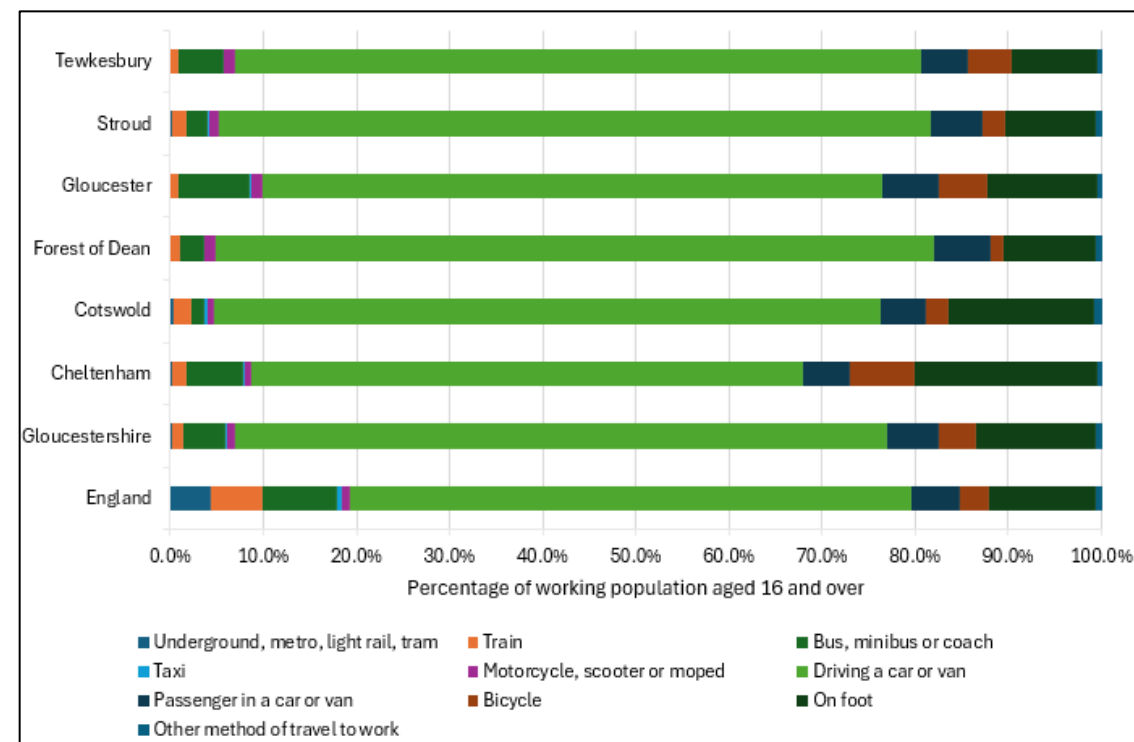
Gloucestershire Travel Patterns

Mode of Travel to Work

The key headlines from Figure 31 and 32 are summarised below:

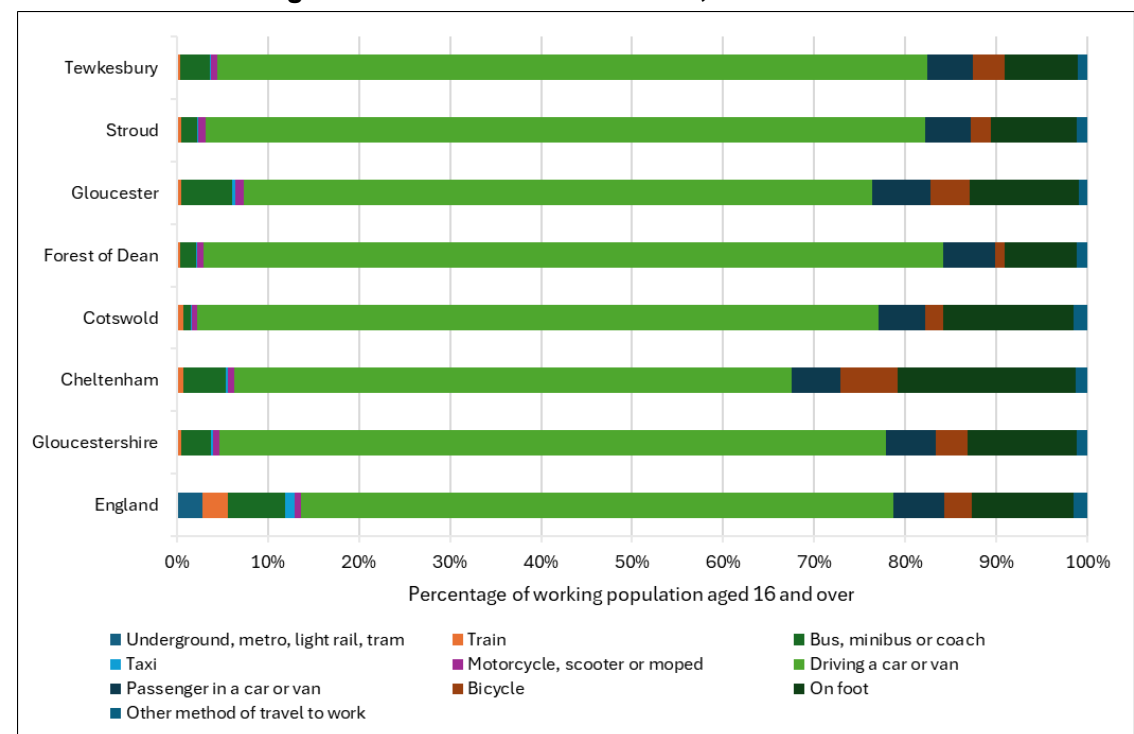
- **Car (driver or passenger):** In 2011, 70% of residents travelled by car and 6% as a passenger. This increased to 73% of residents travelling by car as a driver and 6% as a passenger in 2021. Within Gloucestershire, the Forest of Dean had the highest number of drivers (74%), while Cheltenham had significantly less at 63% of residents in 2021. This reflects the more rural nature of the Forest of Dean compared to the urban nature of Cheltenham.
- **Active Travel:** In 2021, 3% of residents travelled to work by bicycle and 12% walked, giving a combined active travel mode share of 15%. This is broadly in line with the national average of 14%. Within Gloucestershire, the highest rates of active travel in 2021 were in Cheltenham (26%) and the lowest rates were in the Forest of Dean and Tewkesbury (9%). Despite the COVID-19 pandemic, active travel levels slightly declined from 2011 where 17% of residents in Gloucestershire travelled to work by bicycle or on foot.
- **Bus:** In 2021, 3% of Gloucestershire's residents travelled to work by bus, down from 5% in 2011, which may have been impacted by the COVID-19 pandemic. At a national level, bus mode share was higher than Gloucestershire at 6% in 2021, although this is influenced by the concentration of the population in London and other major cities in the UK. Within Gloucestershire, only 1% of the population travelled to work by bus in Cotswold in 2021, and 2% in the Forest of Dean and Stroud, reflecting the rural nature of these districts. The highest rates of bus patronage were in the main urban centres of Gloucester (6%) and Cheltenham (5%).
- **Train:** In 2021, less than 1% of the population of Gloucestershire travelled to work by train, a slight decrease from 2011 (just over 1%). At a national level, train mode share in 2021 was higher at 3%. Similar to the bus mode share, these figures are likely to be a result of the COVID-19 pandemic. Train mode share was relatively even across Gloucestershire, with less than 1% of the population across all six districts travelling by train in 2021.

Figure 31: Mode of travel to work, Census 2011



Source: Census 2011: QS701EW – Method of travel to work

Figure 32: Mode of travel to work, Census 2021



Source: Census 2021: TS061 - Method used to travel to work

Gloucestershire Travel Patterns

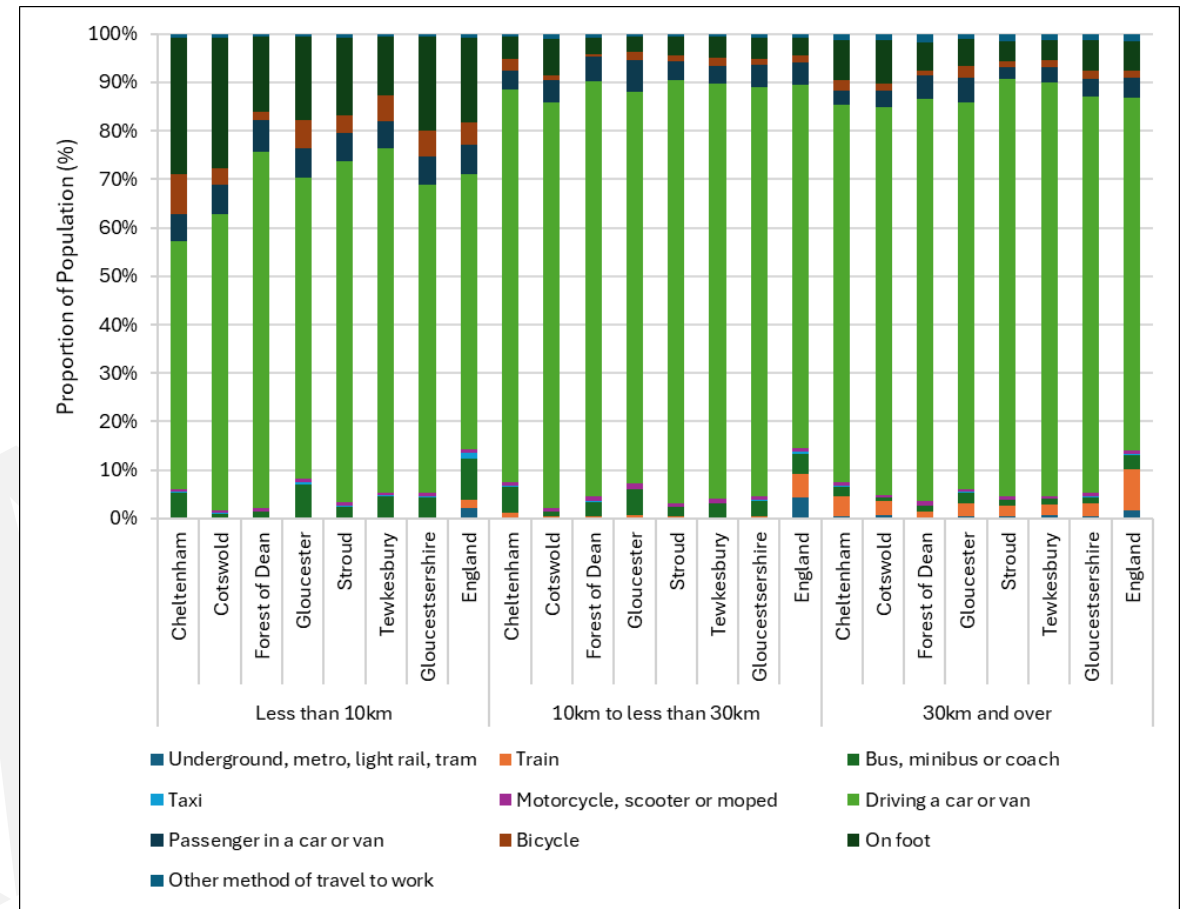
Travel Mode by Distance

Figure 33 presents how people travelled to work in 2021, by mode and by distance travelled.

Journeys that are less than 10km represent journeys that have the potential to be made more sustainably by a combined use of walking, cycling and public transport. The 2021 census data identified that of journeys less than 10km, only 25% travelled by bicycle or on foot, whilst 70% travelled by car (driver or passenger) or by motorcycle. Approximately 4% of people living under 10km travelled by bus, and less than 1% by train.

Within Gloucestershire, the proportion of those travelling shorter distances by more sustainable modes such as foot, cycle or bus was highest in Cheltenham while the Forest of Dean and Tewkesbury had a higher proportion of car use. This data shows significant potential to shift shorter distance journeys to work to sustainable modes, particularly in the urban areas.

Figure 33: Method of travel to the workplace by distance in Gloucestershire

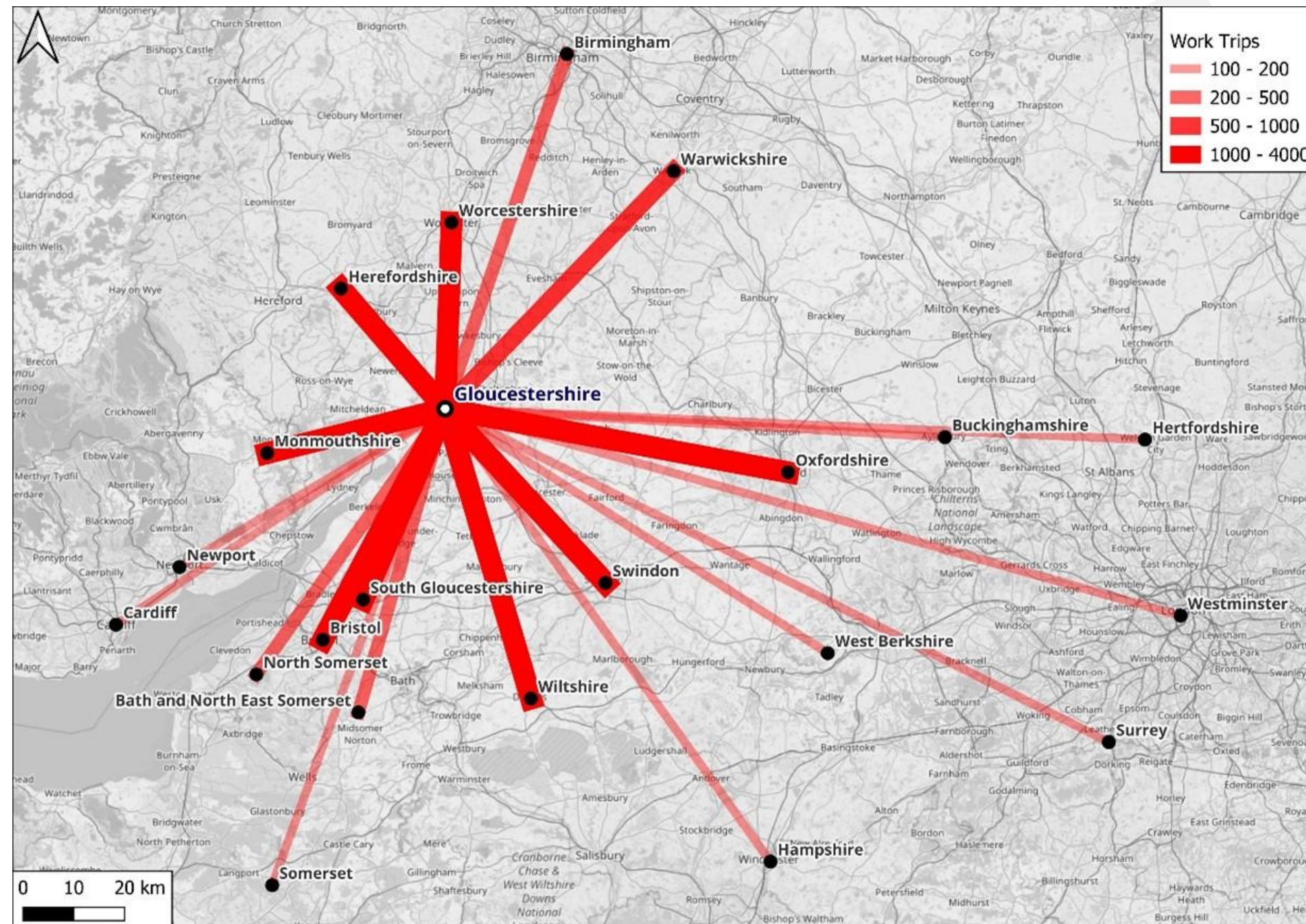


Source: Census 2021: Method used to travel to work by distance travelled to work [RM077]

Workplace Destinations from Gloucestershire

The key workplace destinations for residents in Gloucestershire, represented by outbound origin-destination data from the 2021 Census, is presented in Figure 34. The most popular workplace destinations for Gloucestershire's residents were South Gloucestershire (3,744 people), Worcestershire (2,955 people), Oxfordshire (2,780 people) and Bristol (2,082). Some residents travelled further to destinations including Greater London (764 people), Somerset (177 people) and Birmingham (295 people). This demonstrates the importance of adequate connections into neighbouring counties by a range of modes and the importance of Gloucestershire's place in the national transport network to support longer distance travel.

Figure 34: Workplace destinations in Gloucestershire



Source: Census 2021 Location of usual residence and place of work (ODWO1EW)

Workplace Destinations outside of Gloucestershire

Following on from Figure 34, Figure 35 illustrates long-distance inbound commuting patterns into Gloucestershire from wider regions.

While the strongest work-trip flows are concentrated from neighbouring authorities and major employment centres such as Bristol, South Gloucestershire, Monmouthshire, Wiltshire, Worcestershire, Warwickshire and Oxfordshire, smaller but notable numbers of trips extend from destinations such as Cheshire West and Chester, Shropshire, Wolverhampton, Devon, Cornwall and Hampshire.

Although many of these longer-distance flows typically account for fewer than 200 work trips, they demonstrate that Gloucestershire's labour market extends well beyond its immediate neighbours and relies on strategic transport connections across the South West, Midlands and Wales. This highlights the importance of maintaining strong cross-border connectivity to support access to employment opportunities.

Figure 35: Workplace destinations outside Gloucestershire



Source: Census 2021 Location of usual residence and place of work (ODWO01EW)

Workplace Origin and Destination by district

Workplace commuting patterns are shown in Figure 36. The data indicates that most residents work within their home district, such as the Forest of Dean and Stroud holding the highest containment rates (85% and 80%). Tewkesbury experiences the greatest inflow of commuters.

Cross-boundary movements are also significant, particularly between the Cotswolds and West Oxfordshire, Swindon and Wiltshire, and between the Forest of Dean, Herefordshire and Monmouthshire, highlighting the importance of both local and wider regional travel connections.

Figure 36: Workplace Origin and Destination

Largest movement in		Largest movement out	
Tewkesbury (5,908 or 39%) Gloucester (3,335 or 22%) Stroud (1,245 or 8%)		Cheltenham (62,293 workers of which 47,241 (76%) lived and worked in Cheltenham and 15,052 (24%) travelled from another area)	
Stroud (1,803 or 15%) Swindon (1,763 or 14%) Wiltshire (1,366 or 11%)		Cotswold (48,903 workers of which 36,664 (75%) lived and worked in Cotswold and 12,239 (26%) travelled from another area)	
Gloucester (1,126 or 21%) Herefordshire (1,004 or 19%) Monmouthshire (765 or 14%)		Forest of Dean (34,516 workers of which 29,236 (85%) lived and worked in Forest of Dean and 5,280 (15%) travelled from another area)	
Tewkesbury (4,360 or 25%) Stroud (3,749 or 21%) Cheltenham (2,977 or 17%)		Gloucester (65,600 workers of which 47,679 (73%) lived and worked in Gloucester and 17,921 (27%) travelled from another area)	
Gloucester (4,820 or 42%) South Gloucestershire (1,143 or 10%) Cotswold (1,011 or 9%)		Stroud (58,147 workers of which 46,782 (80%) lived and worked in Stroud and 11,365 (20%) travelled from another area)	
Gloucester (4,950 or 31%) Cheltenham (3,776 or 23%) Wychavon (1,306 or 8%)		Tewkesbury (46,930 workers of which 30,852 (66%) lived and worked in Tewkesbury and 16,078 (34%) travelled from another area)	
		Tewkesbury (3,776 or 32%) Gloucester (2,977 or 25%) Cotswold (1,232 or 10%)	
		West Oxfordshire (1,249 or 13%) Swindon (1,113 or 12%) Cheltenham (1,019 or 11%)	
		Gloucester (2,847 or 27%) Herefordshire (1,526 or 14%) Tewkesbury (1,228 or 11%)	
		Tewkesbury (4,950 or 28%) Stroud (4,820 or 27%) Cheltenham (3,335 or 19%)	
		Gloucester (3,749 or 29%) South Gloucestershire (1,886 or 15%) Cotswold (1,803 or 14%)	
		Cheltenham (5,908 or 38%) Gloucester (4,360 or 28%) Cotswold (944 or 6%)	

Source: Census 2021 Location of usual residence and place of work (ODWO01EW)

Car Ownership

Figure 37 and Table 13 present the average number of cars and vans per household in Gloucestershire. The data shows that 72% of all households own at least one car, which is higher than the national average at 67%. In contrast, 15% of households who do not own a car or van in Gloucestershire, which is significantly lower than England (24%). This demonstrates that overall, Gloucestershire has higher than national average levels of car ownership.

However, car ownership in Gloucestershire has similar patterns to neighbouring authorities of Shropshire, Oxfordshire and Herefordshire. This reflects the county’s generally rural and affluent nature. The high levels of car ownership result in car and van travel being the predominant mode for journeys to work in Gloucestershire.

Within Gloucestershire, there is a clear distinction between car ownership levels in urban and rural districts. In predominately urban areas, such as Gloucester and Cheltenham, 20% of households do not own a car. However, in more rural areas such as the Forest of Dean and the Cotswold, this reduces to 12% and 11% respectively.

This highlights the importance of providing viable alternatives to private car use, particularly in rural areas where car dependency is highest, to improve accessibility, support sustainable travel behaviours and ensure residents can access employment, education, services and leisure opportunities without relying solely on a private vehicle.

Figure 37: Car ownership in Gloucestershire

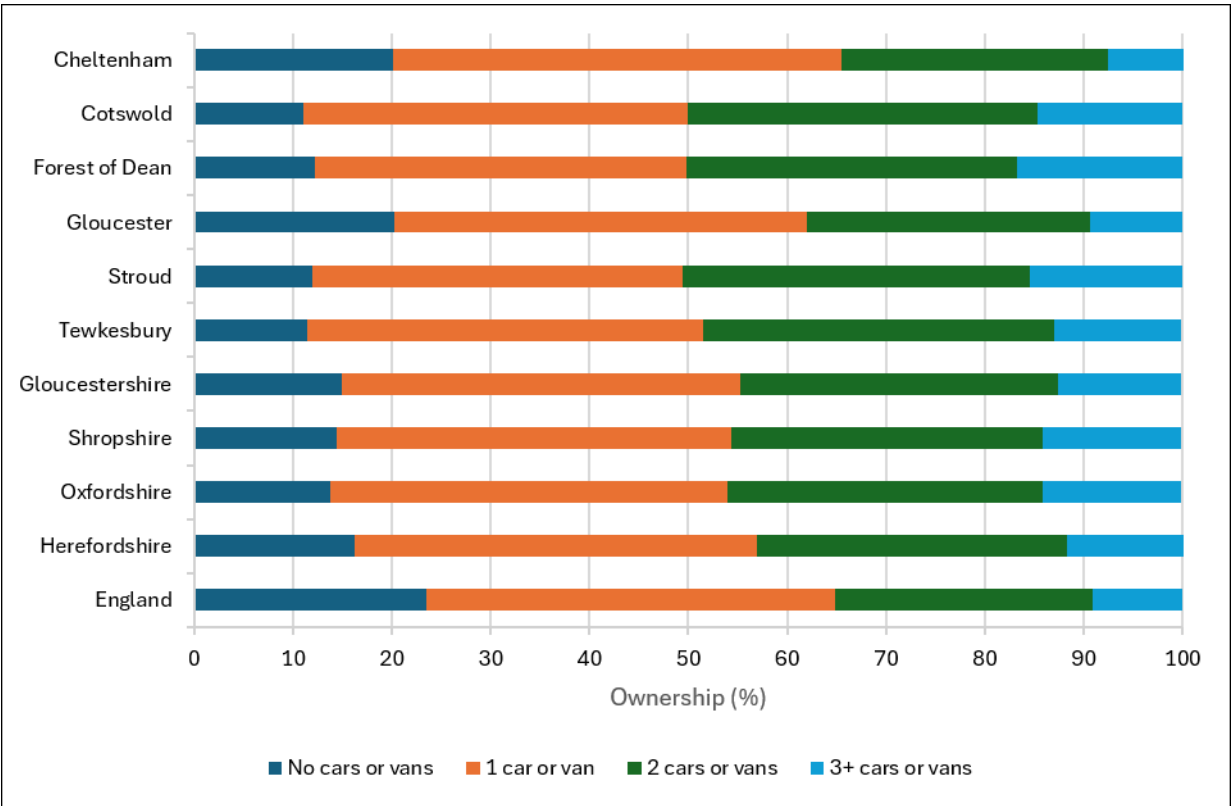


Table 13: Car Ownership in Gloucestershire compared to regional and national

	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Gloucestershire	Shropshire	Oxfordshire	Herefordshire	National
No car	20%	11%	12%	20%	12%	12%	15%	14%	16%	14%	24%
1 car	45%	39%	38%	42%	38%	40%	40%	40%	41%	40%	41%
2 cars	27%	35%	33%	29%	35%	36%	32%	32%	31%	32%	26%

Source: Census 2021 Car and Van Availability (TS045)

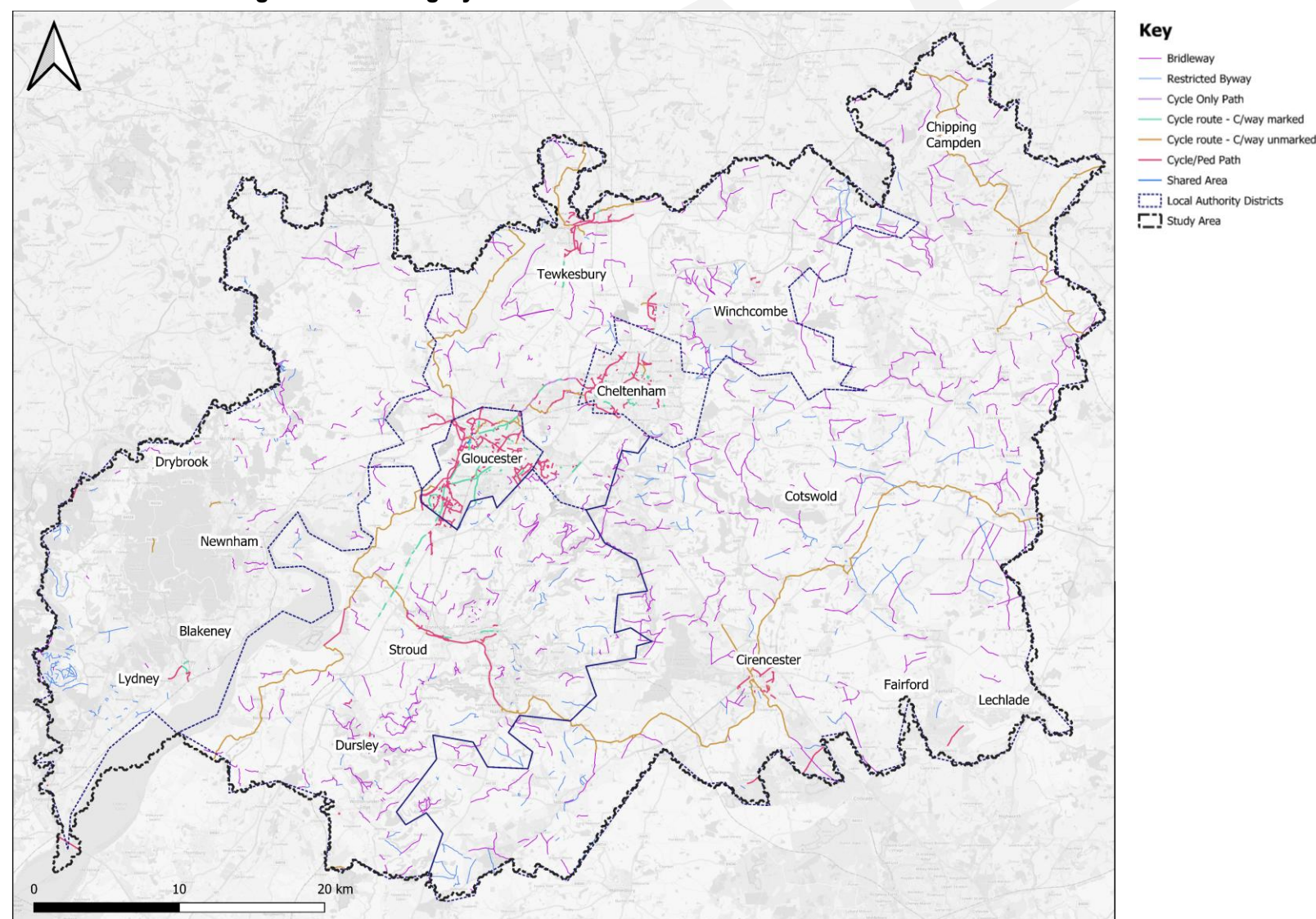
Active Travel

Existing Cycling Provision

Figure 38 presents the current cycle network in Gloucestershire. Existing cycling infrastructure in the county is concentrated in Gloucester and Cheltenham, with some local cycle routes in Tewkesbury, Cirencester and Lydney. There are also unmarked carriageway cycle routes spanning across Cotswold, Stroud and Tewkesbury.

The cycle network is largely confined to the main settlements in the district with some cycle connections between the districts such as Tewkesbury, Gloucester, Stroud and Cotswold. There is limited cycle provision in the Forest of Dean and into Cheltenham from the districts apart from Gloucester.

Figure 38: Existing Cycle Network in Gloucestershire



Source: Gloucestershire County Council

Active Travel

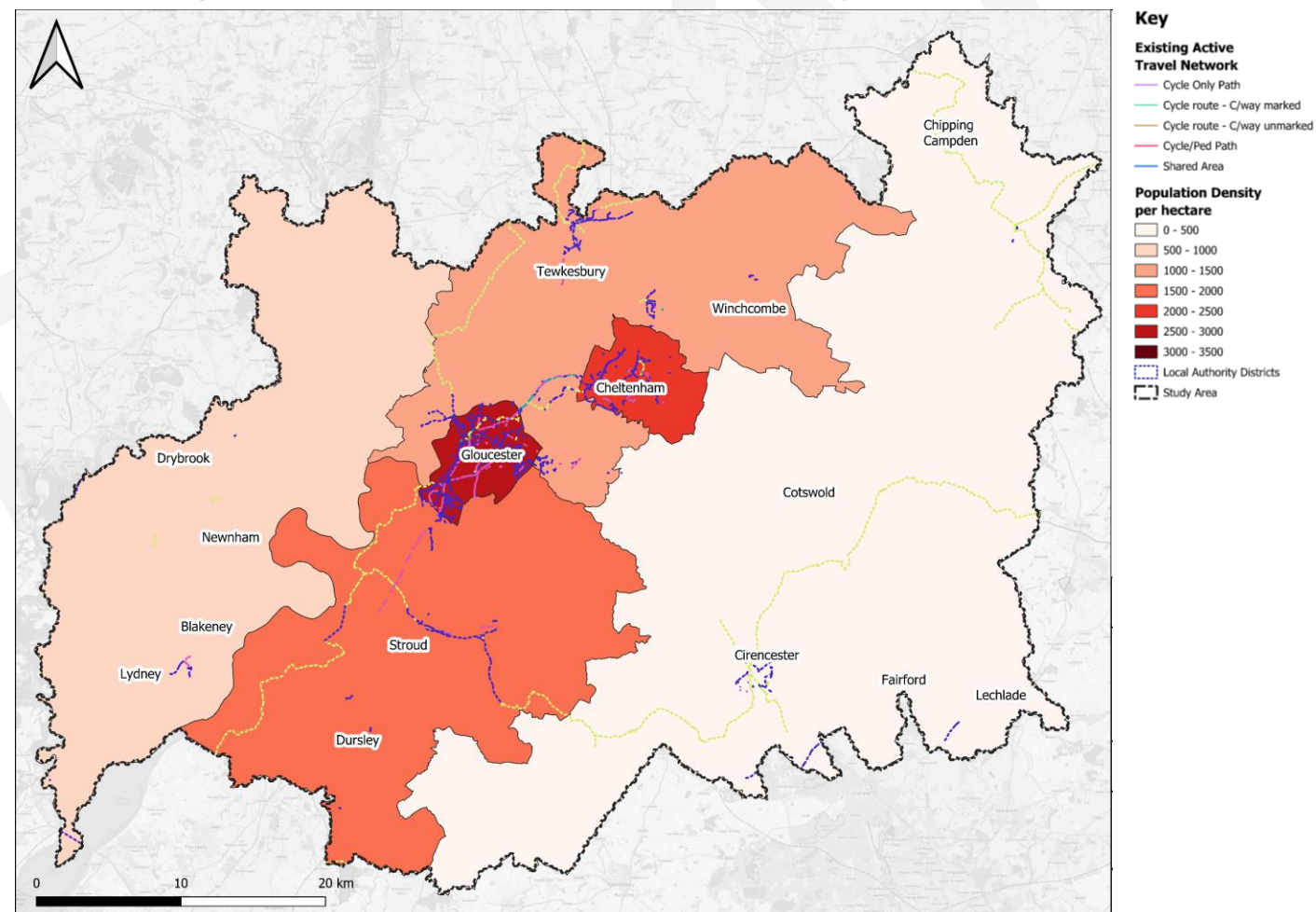
Existing Cycling Provision

Figure 39 maps the cycle network against population density in Gloucestershire. The most concentrated sections of the cycle network are situated within the districts with a high population density. In particular, the urban areas of Gloucester (3,418 people/km²) and Cheltenham (2,613 people/km²) have the largest population clusters and a dense active travel network to serve demand.

Other districts across Gloucestershire such as Tewkesbury (246 people/km²), Forest of Dean (171 people/km²), Cotswold (79 people/km²) and Stroud (273 people/km²) which have a lower population density have a sparse cycle network due to the reduced demand for cycling provision.

There is an opportunity in the rural areas of Gloucestershire to provide a wider network of cycle routes for users by promoting the use of existing bridleways and byways. There is also an opportunity to invest in traffic calming measures in rural areas to make roads safer, helping to encourage cyclists to use the existing highway network for their journeys.

Figure 39: Active Travel Network vs Population Density (2024)



Source: Mid Year Population Estimates, England and Wales, 2024

Active Travel

Gloucestershire Cycle Spine

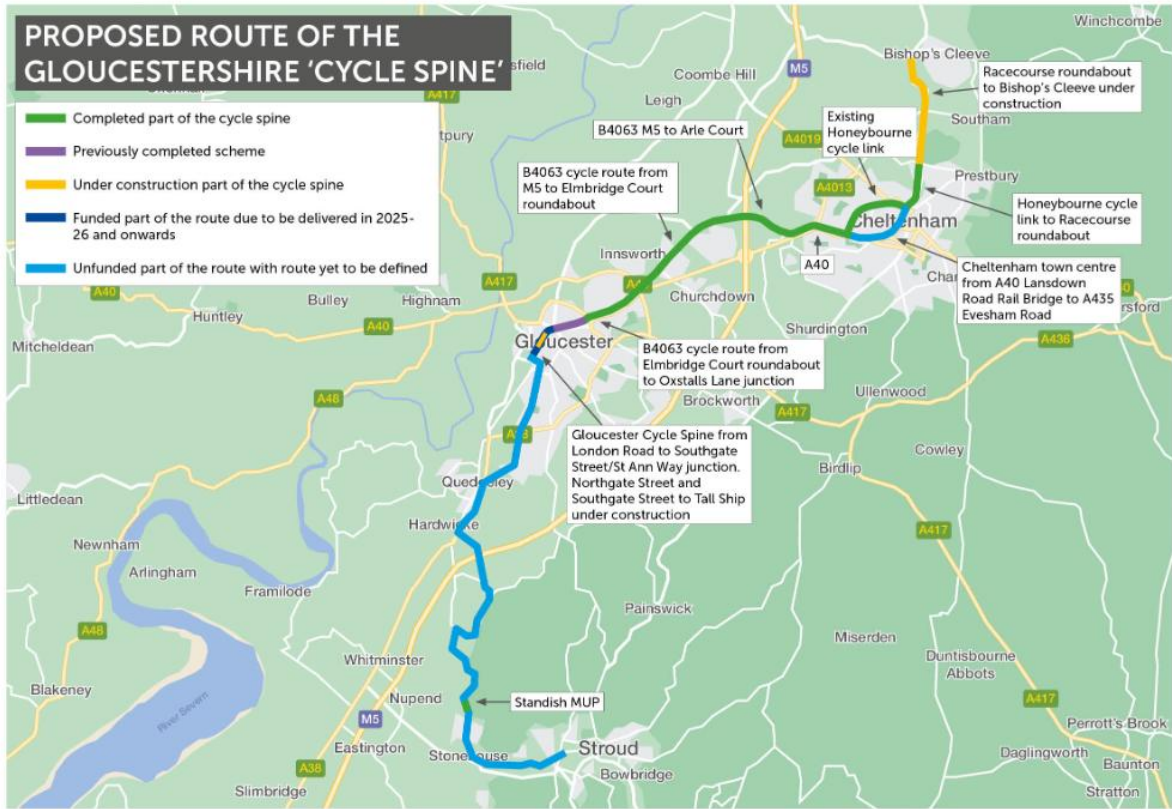
The Gloucestershire Cycle Spine is a proposed 26-mile cycling and walking corridor stretching from Stroud to Bishop’s Cleeve as shown in Figure 40. The new Cycle Spine will help to support the existing cycle provision and deliver a comprehensive active travel network across the county, in line with GCC’s ambition to deliver high-quality cycle and pedestrian facilities that comply with the latest cycle design guidance.

Sections of the cycle spine have already been completed, including:

- **Corridor between Gloucester and Cheltenham:** This corridor comprises of the (from east to west) Honeybourne cycle link, B4063 Arle Court to M5, B4063 cycle route from M5 to Elmbridge Court roundabout, and the B4063 cycle route from Elmbridge Court roundabout to Oxstalls Lane junction.
- **Standish Multiuser Path:** This is a 500m path for pedestrians, cyclists and horse riders, linking Horsemaring roundabout, Stonehouse and Blackbridge on the B4008 towards Standish.

Table 14 presents a comparison of cycle usage at Arle Court since 2018. It highlights an increase in the number of cyclists following completion of some sections of the Cycle Spine. This usage reinforces the importance of establishing a continuous cycling route across Gloucestershire. As the Cycle Spine progresses, it is anticipated that data will reflect increased demand along these routes due to the upgraded infrastructure, supporting further growth in active travel in the county.

Figure 40: Proposed Route of the Gloucestershire Cycle Spine



Source: GCC, Gloucestershire Cycle Spine

Table 14: Arle Court Cycle Count % Change

Year	7 day average (2 way)	% increase since 2018
2018	231	17.7%
2019	214	-7%
2022	272	27%
2023	360	56%
2025	461	100%

Source: Gloucestershire LTP Progress Report 2024-2025

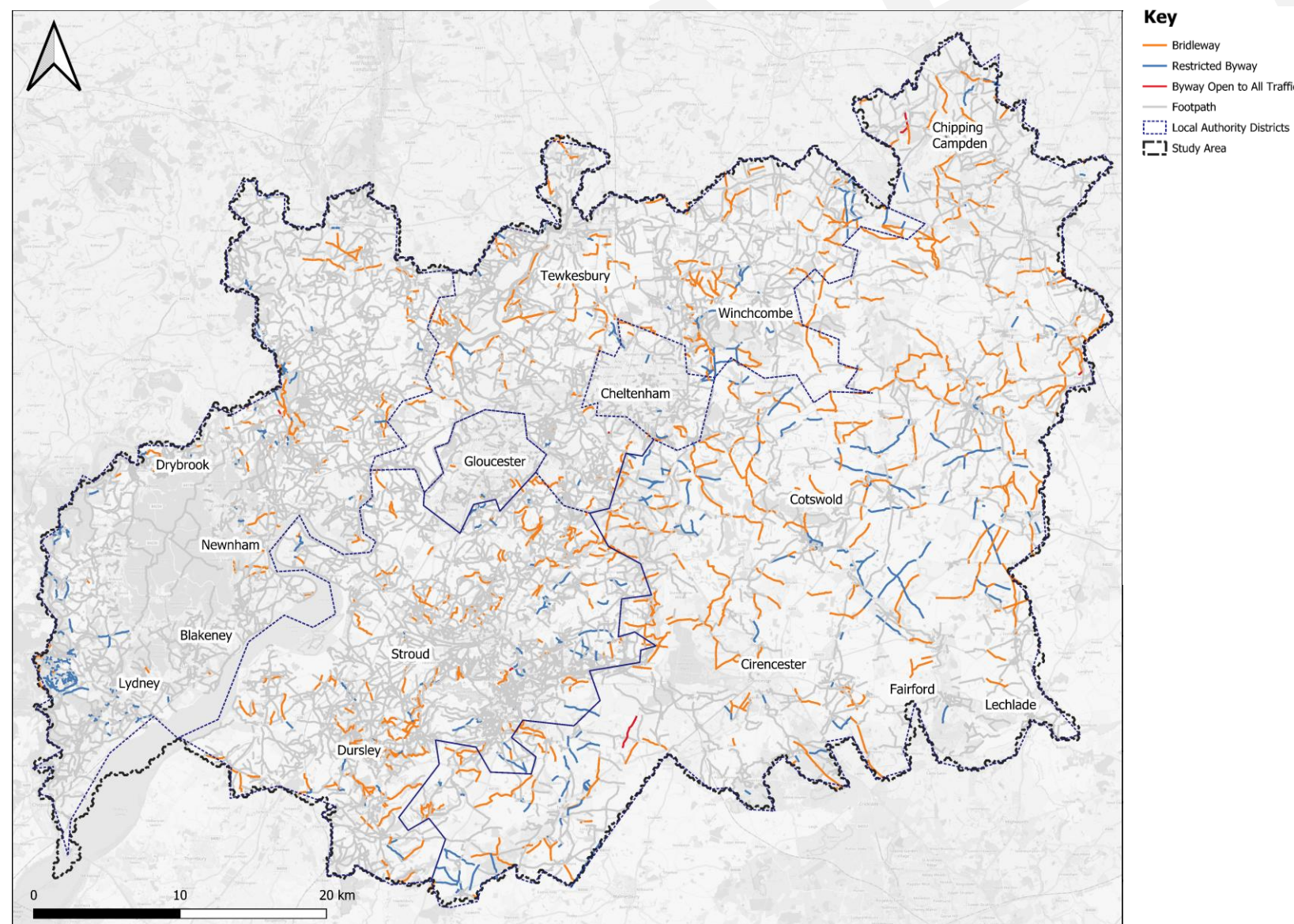
Active Travel

Public Rights of Way

Gloucestershire has 3,509 miles of Public Rights of Way. Figure 41 presents the Public Rights of Way Network in Gloucestershire. Footpaths, bridleways and byways are more evenly spread across the county than the cycle network. Footpaths, bridleways and byways are more evenly spread across the county than the cycle network, with the densest coverage of footpaths in Stroud and the densest coverage of bridleways and byways in Cotswold with more limited provision elsewhere.

The Public Rights of Way network, particularly the bridleways and byways provide a wider network of cycling routes for users and infills some of the gaps in the current traditional cycle network. However, some sections of the Public Rights of Way network will not be suitable for use in all seasons which reduces the resilience of this network.

Figure 41: Gloucestershire Public Rights of Way Network



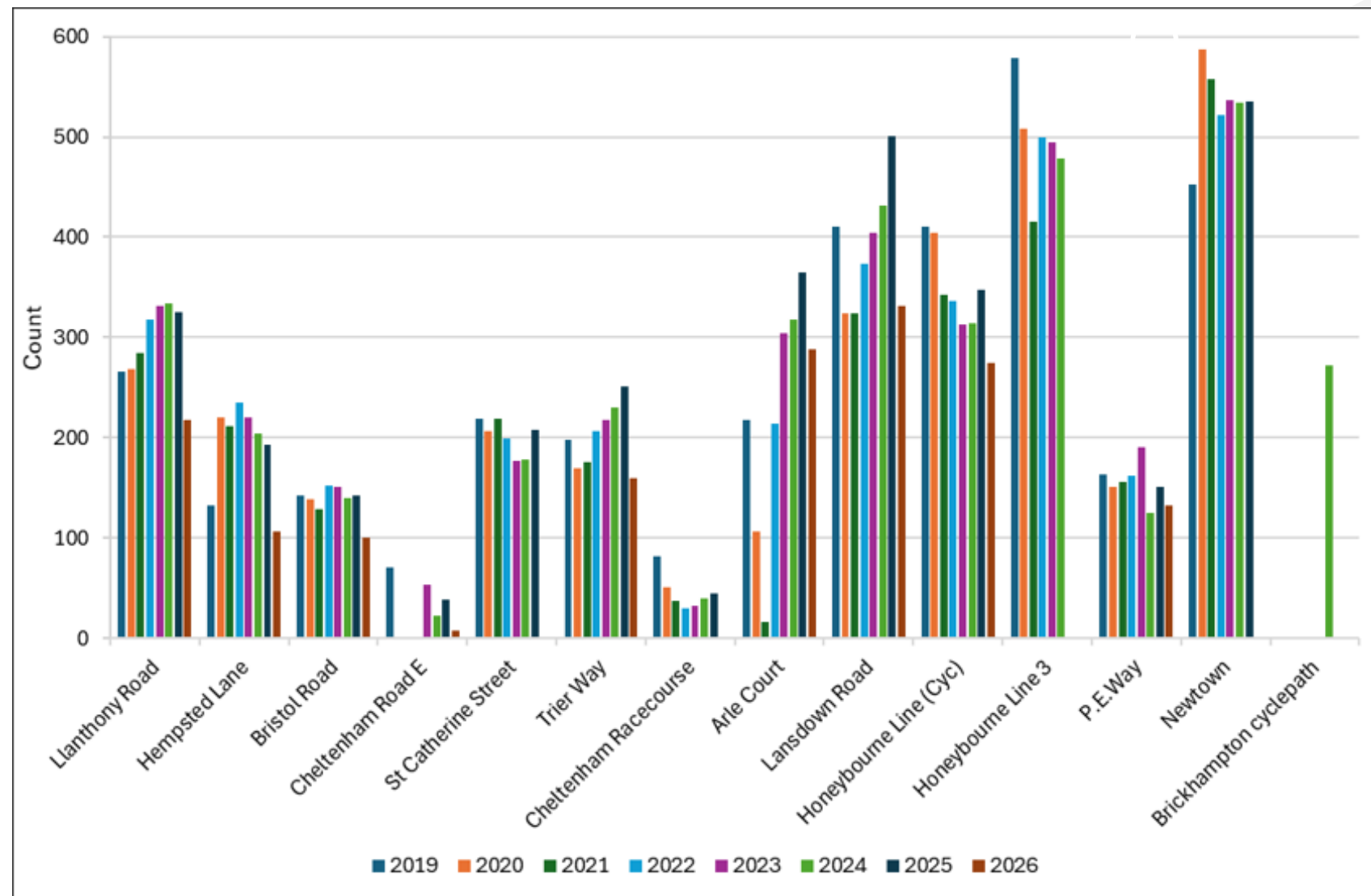
Source: Gloucestershire County Council

Active Travel

Number of people walking and cycling

Figure 42 presents average daily cycle flows (24-hour, 7-day average) between 2019 to 2026 at 14 different sites across Gloucestershire. Some locations have seen significant fluctuations in average annual flows over the review period, such as Arle Court and Lansdown Road, while others have remained more stable, such as Bristol Road and St Catherine Street.

Figure 42: Average daily annual cycle flows, 2019-2026



Source: GCC Cycle Count Data, VivaCity

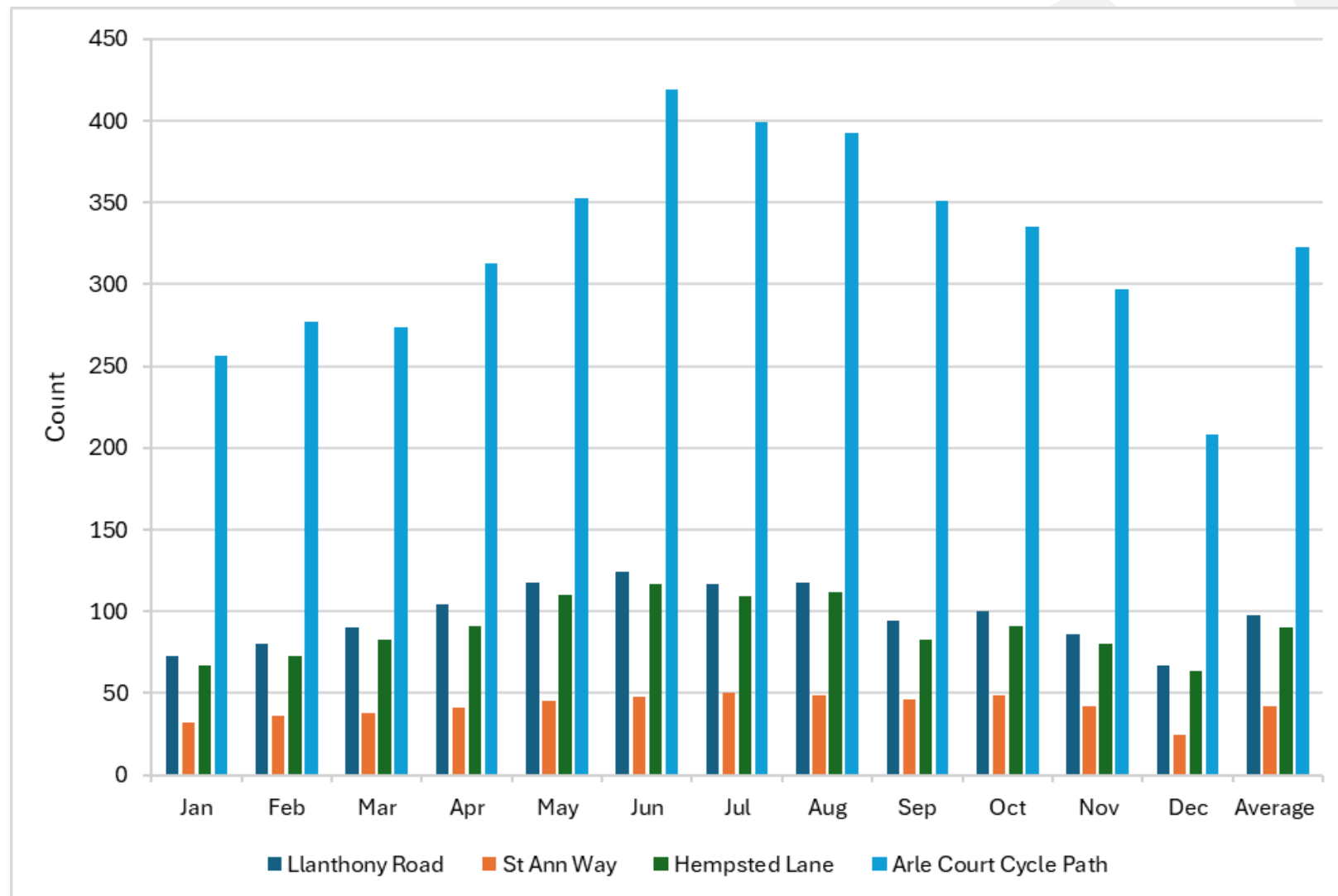
Active Travel

Number of people walking and cycling

The data shows consistently high cycling activity along Arle Court cycle path, Llanthony Road and Hempsted Lane, while St Ann Way records markedly lower flows throughout the year. Figure 43 presents the monthly cycle flows during 2024.

Volumes generally peak during the summer months, particularly between June and August, before tapering off towards December reflecting typical seasonal cycling patterns in the UK. For example, the highest usage in June was Llanthony Road (124 counts), Hempsted Lane (117 counts) and Arle Court (419 counts), while St Ann Way reached its own annual peak in July (50 counts). This usage reinforces that there is demand for a comprehensive cycle network in Gloucestershire shown by the Arle Court cycle path usage.

Figure 43: Monthly cycle flows 2024



Source: GCC Cycle Count Data, VivaCity

Active Travel

Frequency of walking and cycling for travel purposes

In Gloucestershire, 6.3% of people cycle at least once a week for travel purposes and 34.1% walk. This falls to just 2.5% for cycle and 17% for walking for travel at least three times per week as shown in Table 15.

These figures are broadly in line with the national average, with cycling being slightly higher across all frequencies (apart from at least 5 times a week), and walking slightly lower. For example, 34% of people in Gloucestershire walk at least once per week for travel purposes compared to 38% nationally.

Frequency of walking and cycling for leisure purposes

In Gloucestershire, 8.6% of people cycle at least once a week for leisure purposes and 62% walk. This falls to just 30% and 2.6% for walking and cycling at least three times per week as shown in Table 16.

For both walking and cycling for leisure purposes, the figures for Gloucestershire are slightly higher than the national average. For example, 72% of people in Gloucestershire walk at least once per week for leisure purposes compared to 65% nationally.

While current levels of walking and cycling for travel and leisure purposes demonstrate a positive picture when compared to the national averages and demonstrate the opportunity for investment to support healthier, more active lifestyles in Gloucestershire.

Table 15: Proportion of adults who cycle and walk for travel by frequency in Gloucestershire and England (2023 - Active Lives Survey CW0302 and CW0303)

Frequency	Gloucestershire		England	
	Proportion of adults who cycle (%)	Proportion of adults who walk (%)	Proportion of adults who cycle (%)	Proportion of adults who walk (%)
At least once a month	8.3	42.1	7.2	44.5
At least once per week	6.3	34.1	5.4	37.5
At least 3 times per week	2.5	17.0	2.5	18.6
At least 5 times per week	1.1	11.9	1.4	12.8

Table 16: Proportion of adults who cycle and walk for leisure by frequency in Gloucestershire and England (2023 - Active Lives Survey CW0302 and CW0303)

Frequency	Gloucestershire		England	
	Proportion of adults who cycle (%)	Proportion of adults who walk (%)	Proportion of adults who cycle (%)	Proportion of adults who walk (%)
At least once a month	13.9	72.4	11.9	65.9
At least once per week	8.6	62.0	6.7	54.8
At least 3 times per week	2.6	30.0	1.7	26.8
At least 5 times per week	-	21.6	0.8	19.4

Source: Active Lives Survey (CW0302 and CW0303) data, providing data on the frequency that respondents reported to walk and cycle per week, has been used as an indicator of active travel levels in Gloucestershire. Data is available for travel purposes and for leisure purposes.

Active Travel

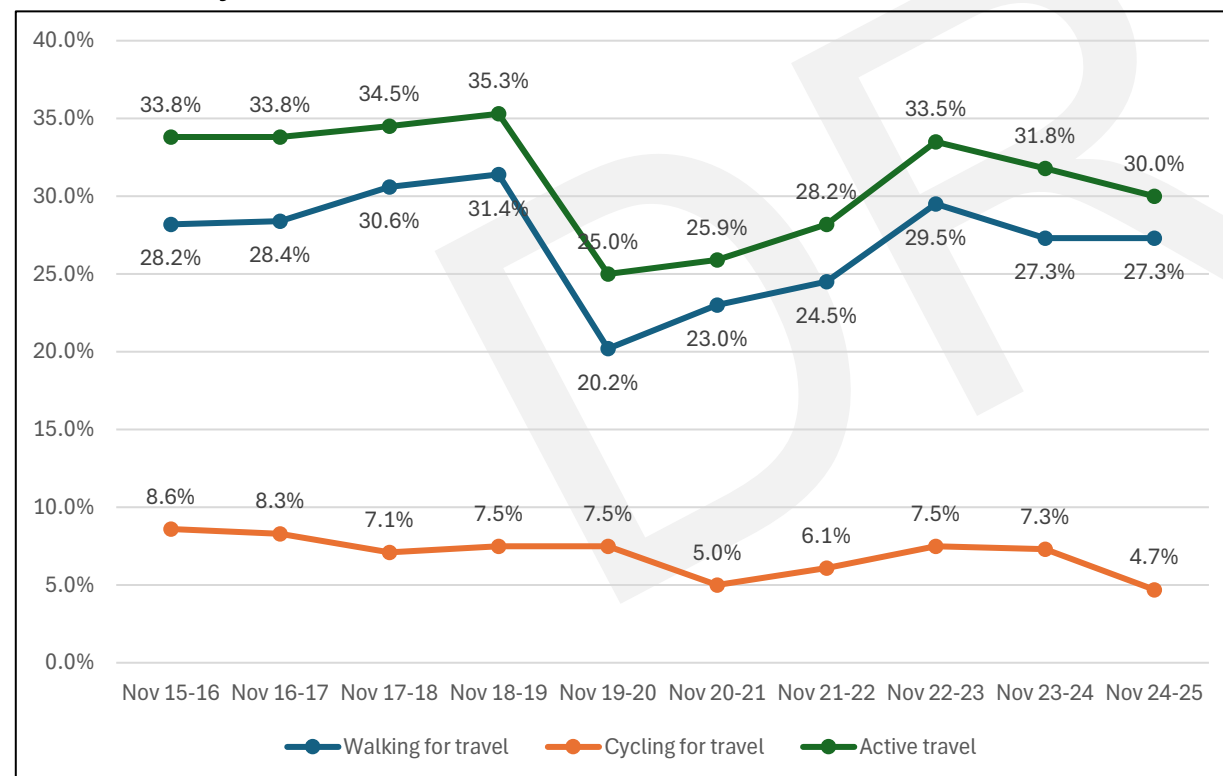
Walking and Cycling for Travel

Walking is the most popular form of active travel compared to cycling, within Gloucestershire and across the country. Between 2024 and 2025 alone, 27.3% of Gloucestershire residents regularly walked, compared to 4.7% for cycling, equating to 30.0% for active travel overall. Notably, walking participation in Gloucestershire has fallen by 1.1 percentage points since 2016/17, while cycling has also declined by 3.6 percentage points, and active travel as a whole has decreased by 3.8 percentage points as shown in Figure 44.

When set against national and regional figures for 2024/25, Gloucestershire's rates for walking, cycling and active travel overall sit slightly below both the national average and the wider South West region as shown in Figure 45.

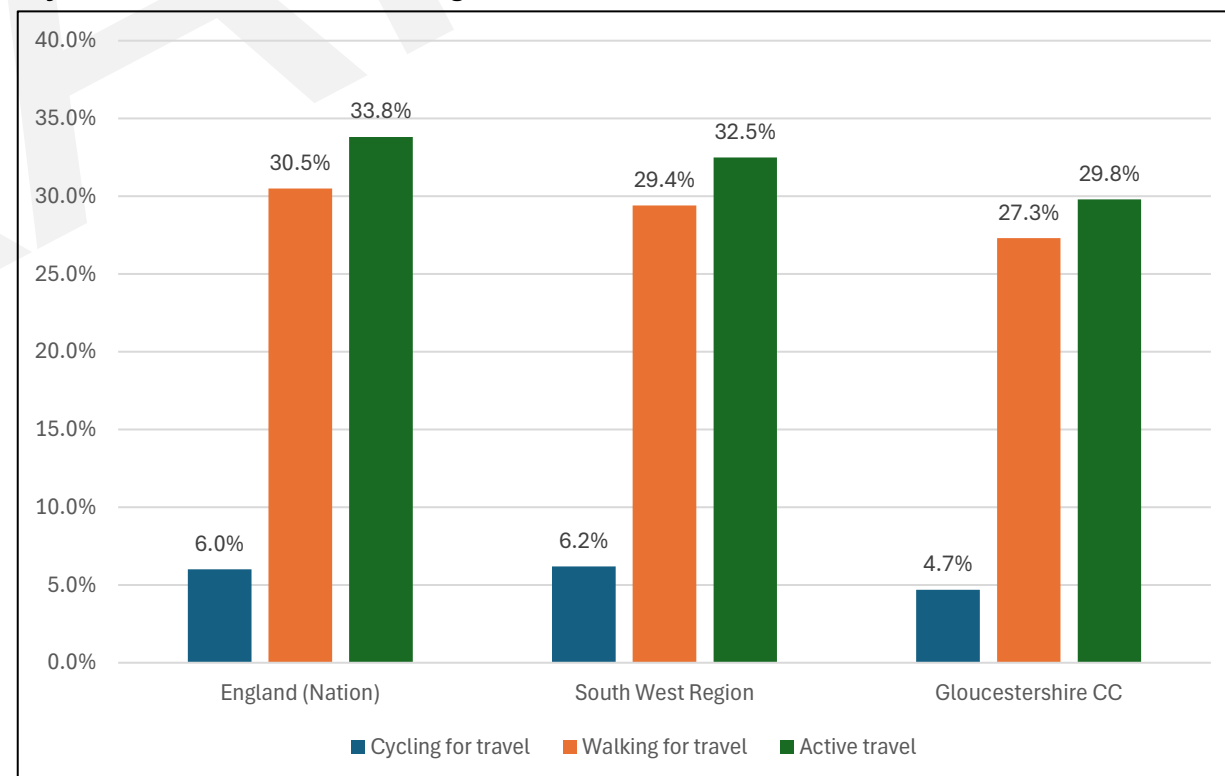
The declining walking rate highlights the need for improved pedestrian infrastructure to encourage more people to walk for everyday journeys. There is also a clear need to address potential barriers to cycling to encourage greater uptake in Gloucestershire which will be supported by the delivering of the Gloucestershire Cycle Spine.

Figure 44: Percentage of respondents who had participated in active travel at least twice in the last 28 days



Source: Active Lives Results

Figure 45: Percentage of respondents who engaged in active travel at least twice in the last 28 days in GCC, South West and England between November 2024 - 2025



Source: Active Lives Results

Bus

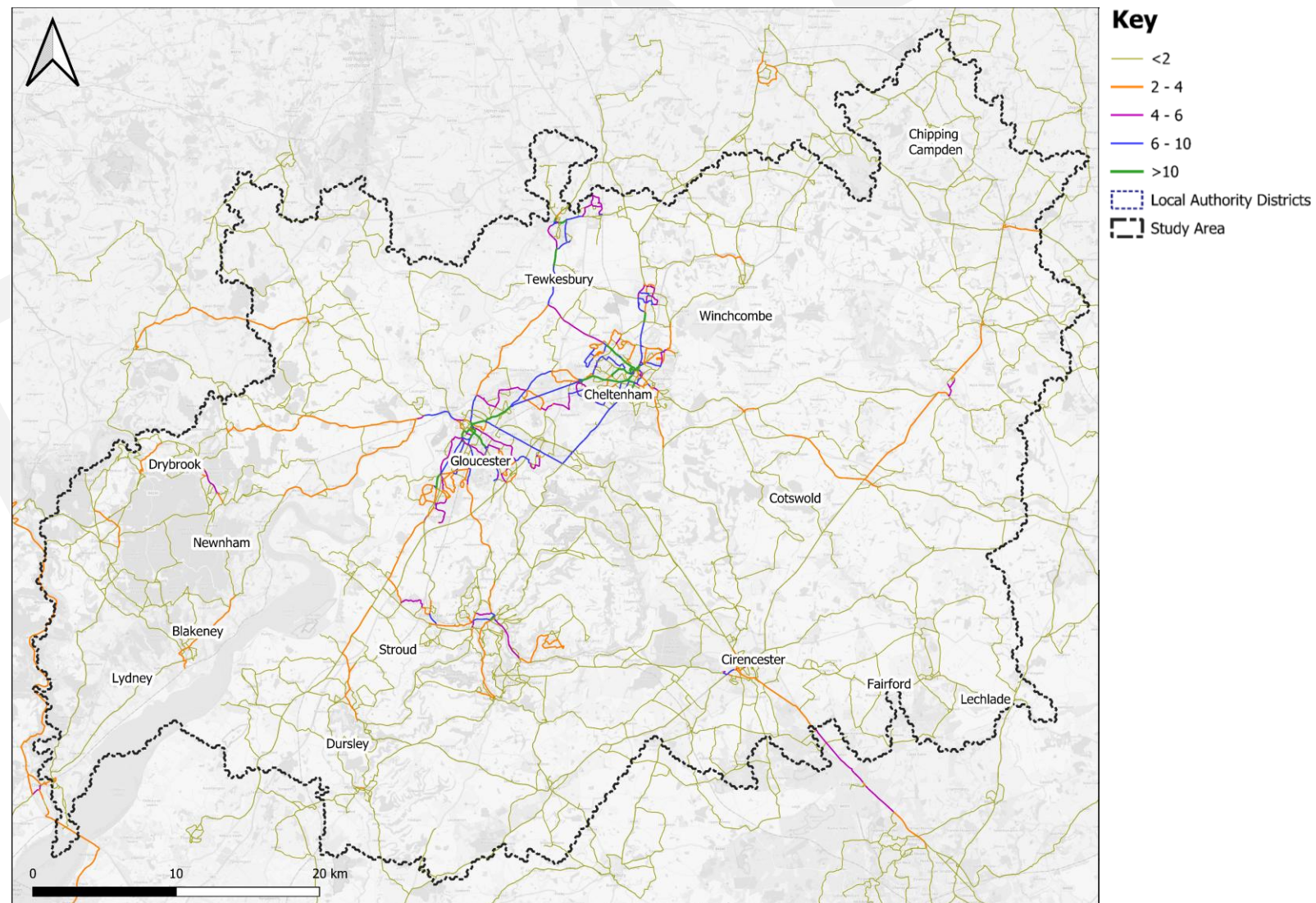
Existing Bus Network

The bus network serves the six districts in Gloucestershire and extends beyond connecting to neighbouring counties such as Worcestershire, Herefordshire, Oxfordshire and Wiltshire. Despite its considerable extent, Gloucestershire's bus network differs significantly between its urban core and the more rural areas. The more urban areas offer more frequent services compared to provision in rural areas.

Figure 46 illustrates that the main urban areas of Gloucester and Cheltenham are served by more frequent bus services (over ten services per hour) than the rest of the county. However, even in Gloucestershire's urban core high frequency services of more than ten services per hour are limited to a small proportion of corridors, such as the A40 and A417 between Gloucester and Cheltenham.

Away from these locations, and particularly in the more rural districts of Cotswold and Forest of Dean, bus accessibility is reduced, and service frequencies are often low (less than two services per hour).

Figure 46: Bus route network and bus frequency (AM Peak)



Source: Gloucestershire Bus Service Improvement Plan

Bus

Bus Accessibility

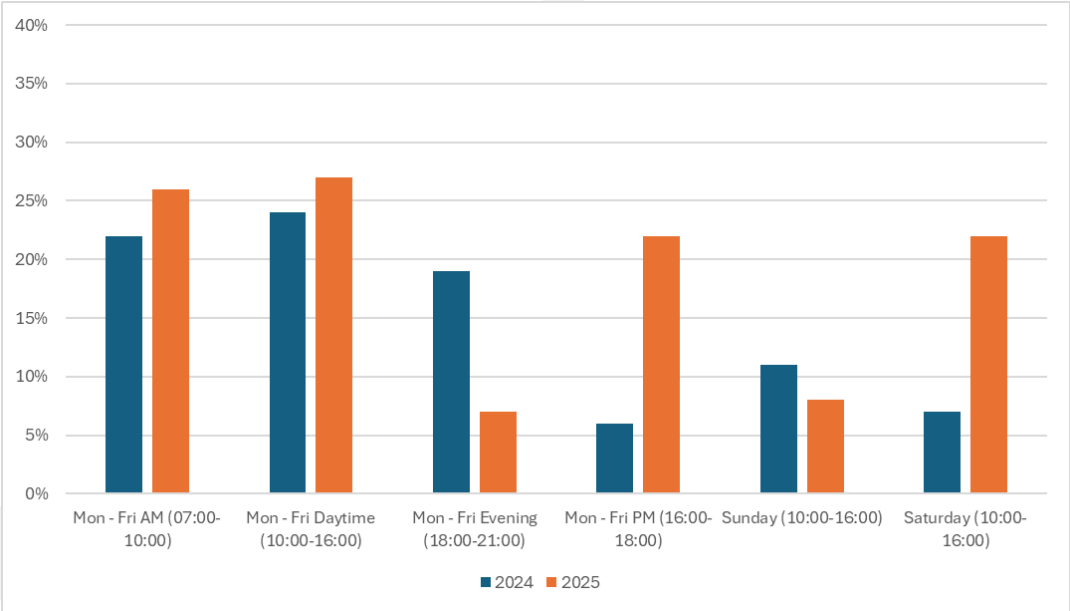
Accessibility to bus services varies not only spatially but across different time periods in Gloucestershire. The main interurban bus services between Gloucester and Cheltenham run a 24 hour bus service, 7 days a week. On the other hand, the bus service frequency between the smaller towns such as Stroud and Tewkesbury is lower with limited evening and Sunday services. The route coverage in rural areas of the county is low or non-existent, especially in the evenings and on Sundays.

Table 17 presents bus network accessibility in Gloucestershire. Just over half of Gloucestershire’s residents live within 400m of a bus stop which is served by 1 or more buses per hour in the morning peak. This reduces to less than 30% of the population with access to 4 or more bus services per hour. This is a significant challenge for Gloucestershire and is a key factor in preventing the use of public transport.

Similar patterns can be seen in the evening peak and on Saturdays. In the evening (Monday-Friday) after 18:00, the level of accessibility reduces, leaving only approximately 7% of the county’s population within 400m of a bus stop with a 15 minute service. On Sunday, accessibility is also low with less than 10% of the population with access to a frequent service during the interpeak period.

Figure 47 presents a comparison of the percentage of the population within 400m of a bus stop served by four or more buses per hour in 2024 and 2025. Overall, access has improved across most time periods, particularly during weekday morning peaks, daytime, evening peaks and Saturday. However, there has been a decline during weekday evenings and on Sundays. Despite improved connectivity the proportion of Gloucestershire’s residents with access to a nearby frequent bus service is low and presents an opportunity to enhance the bus network to serve a wider catchment.

Figure 47: % of the population with access to 4 or more buses per hour



Source: Gloucestershire LTP Progress Report 2024-2025

Table 17: BSIP Network Accessibility (May 2025)

	Distance of stop from home	Mon-Fri AM (07:00-10:00)	Mon-Fri Daytime (10:00-16:00)	Mon-Fri PM (16:00-18:00)	Mon-Fri Evening (18:00-21:00)	Saturday (10:00-16:00)	Sunday (10:00-16:00)
% of the population with access to 4 or more buses per hour	400m	26%	27%	22%	7%	22%	8%
	800m	42%	43%	38%	14%	38%	16%
% of the population with access to 1 bus or more per hour	400m	54%	52%	53%	41%	52%	39%
	800m	69%	67%	69%	57%	67%	53%

Source: Gloucestershire LTP Progress Report 2024-2025

Bus

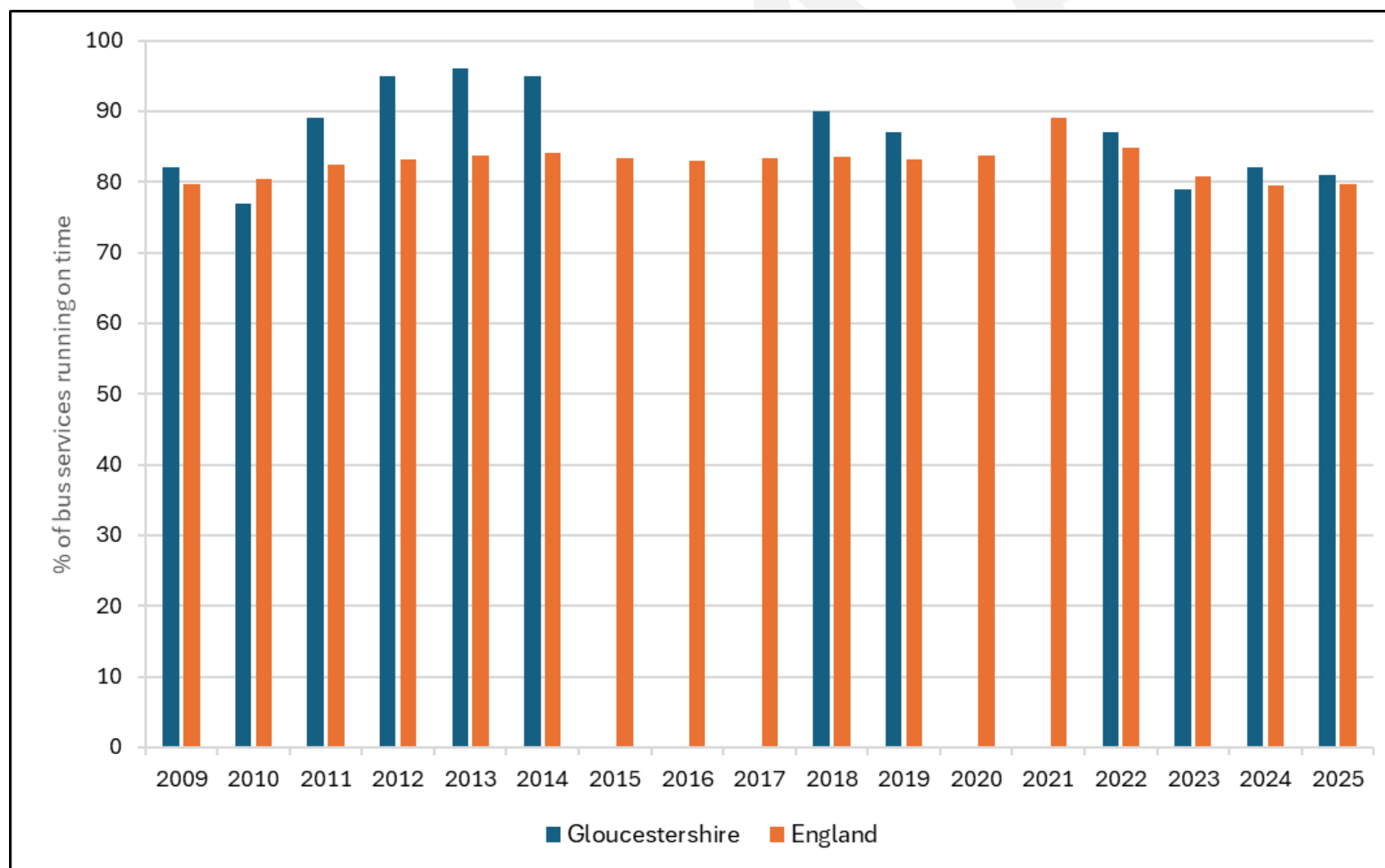
Bus Reliability

Figure 48 shows the percentage of bus services running on time in Gloucestershire between 2009 and 2025. In 2025, 81% of services were on time, a decrease from 87% in 2022 and 82% in 2024, however an increase from 79% in 2023.

Between 2011 and 2014, Gloucestershire bus reliability was higher than the national average. This reduced slightly between 2022 and 2025, where Gloucestershire bus reliability fell more in line with the national average.

Some rural and interurban services struggle to reach their destinations in line with their timetables due to general traffic congestion but also wider factors such as roadworks, weather conditions or accidents contributing to the decline in bus reliability in Gloucestershire. This demonstrates the need to invest in bus priority measures to provide resilience for the bus network and to help improve bus journey time reliability in Gloucestershire.

Figure 48: Non-Frequent bus services running on time



Source: Department for Transport (BUS09a).

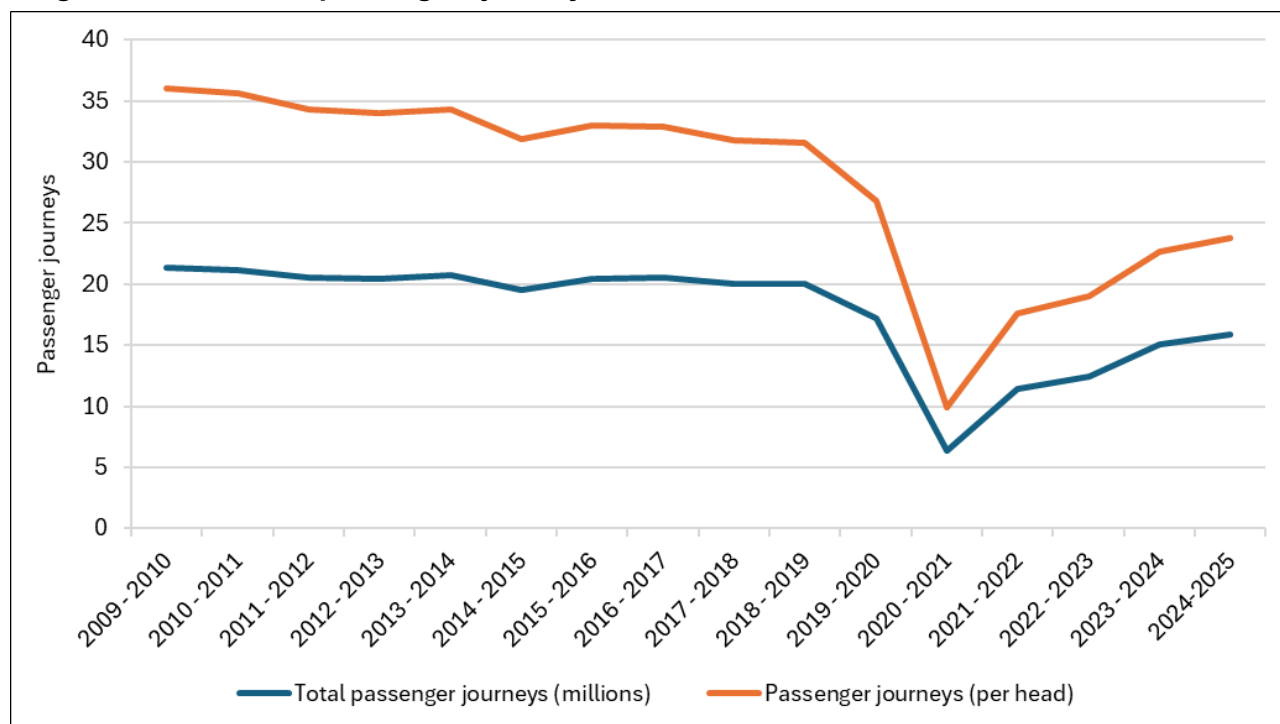
Bus

Bus Passenger Journeys

Prior to COVID-19, there were around 20 million bus passenger journeys per annum in Gloucestershire, representing around 32 single bus trips per head per annum. In 2023, there were 12.6 million bus passenger journeys (19.5 per head) which rose slightly to 15.9 million (24 per head) in 2025. However, bus use in Gloucestershire continues to fall short of pre-pandemic levels. This reduction can be attributed to both a constant national trend in the reduction of bus passenger journeys over the past decade and a steep decline in journeys during the COVID-19 pandemic. Survey data from the LTP Engagement Feedback Report noted that 14% of Gloucestershire residents use the bus at least twice per week with 4% using the bus on a daily basis.

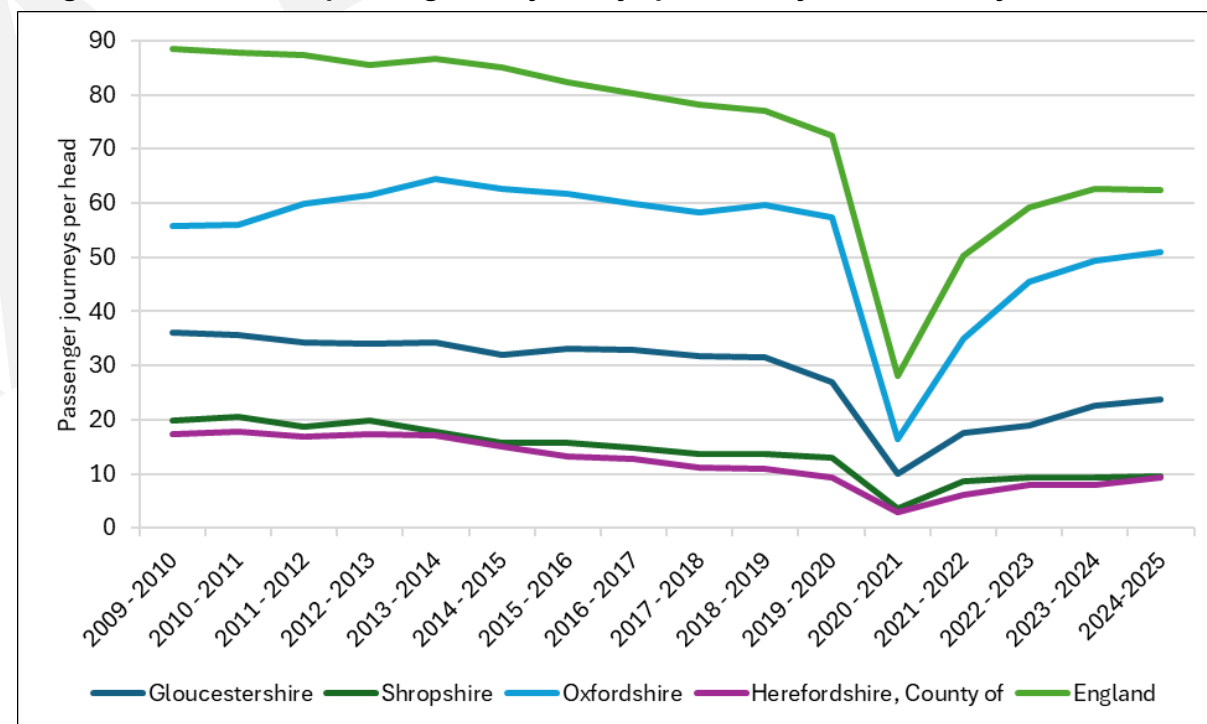
As shown in Figure 50, Gloucestershire's passenger journeys per head remains significantly above those of neighbouring counties such as Shropshire (9.6 journeys per head) and Herefordshire (9.4 journeys per head). However, it is below both Oxfordshire (51 journeys per head) and the national average (62.4 journeys per head). This demonstrates the need to improve bus services and routes to encourage greater uptake in Gloucestershire.

Figure 49: Number of passengers journeys on local bus services



Source: Department for Transport Bus Statistics (Datasets BUS01e & BUS01f). Figure 49 shows passenger bus journeys on local bus services by local authority, and passenger journeys on local bus services per head by local authority.

Figure 50: Number of passenger bus journeys per head by local authority



Source: DfT Public Service Vehicle Survey BUS01f

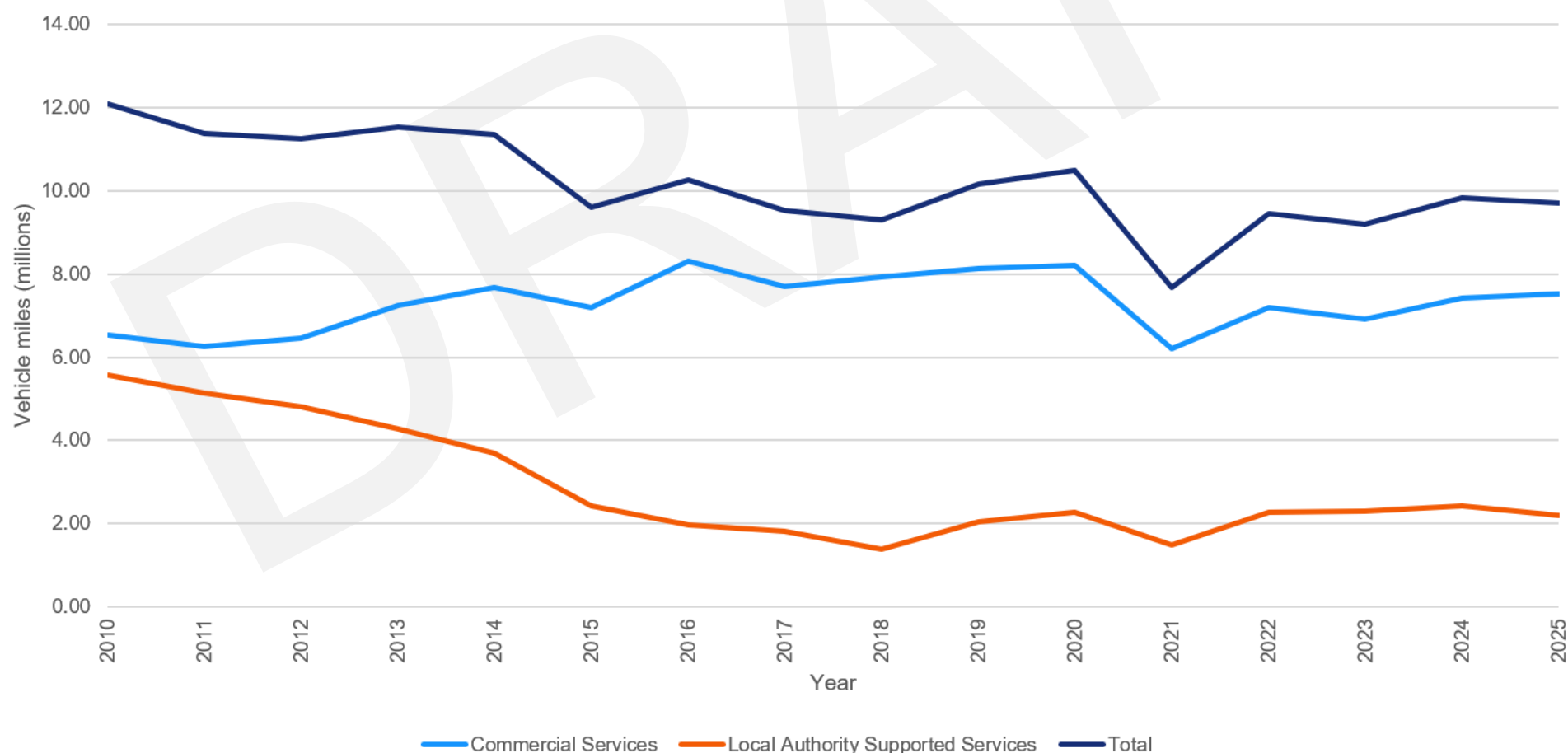
Bus

Bus Mileage

Bus mileage in Gloucestershire has generally declined over the last 15 years, falling by approximately 20% between 2010 and 2025, as shown in Figure 51. This reduction is likely a result of a combination of factors, including increasing car ownership, rising operating costs, funding pressures on bus services, and the impacts of the COVID-19 pandemic. The pandemic in particular led to a significant decline in bus mileage between 2020 and 2021 and accelerated longer-term changes in travel behaviour, including increased flexible working and online shopping, which reduced demand on some traditional bus corridors.

Despite this longer-term decline, bus mileage has shown signs of recovery since 2021, increasing from around 7.7 million miles in 2021 to 9.7 million miles in 2025, representing a 26% increase. This suggests a gradual return of demand and highlights the opportunity to build on recent growth through continued investment in public transport, support for bus operators, and initiatives that improve the attractiveness, reliability and accessibility of bus services across Gloucestershire.

Figure 51: Bus Mileage between 2010 and 2025 in Gloucestershire



Source: Department for Transport (BUS02e_mi)

Bus

Bus Passenger Experience

Table 18 and 19 present public transport satisfaction in Gloucestershire in 2024 across a number of indicators. It shows the satisfaction score in Gloucestershire against the national average and the subsequent gap in the target score.

Of the indicators Gloucestershire’s BSIP aims to bring in line with the national average by 2029, four are already slightly above average, however four are slightly below including frequency of bus services, information about accessible buses, number of bus stops and availability of information to help people plan their journeys.

Of the indicators for which Gloucestershire’s BSIP aims to exceed the national average by 2029, five are already slightly above average, however two are slightly below including the state of bus stops and public transport information relating to the indicators.

The targets which are below the national average present an opportunity to enhance the bus network by increasing bus frequency, enhancing and increasing the number of bus stops and enhancing journey planning information particularly for accessible buses.

Table 18: BSIP target to reach the national average for satisfaction by 2029

Satisfaction Indicator	Gloucestershire Score	National Average	Gap
Frequency of bus services	50%	52%	-2%
Information about accessible buses	45%	46%	-1%
Number of bus stops	64%	66%	-2%
Arrival of buses on time	51%	48%	3%
Local bus services overall	57%	55%	2%
Bus fares	60%	59%	1%
Information to plan journeys	52%	54%	-2%
Reliability of electronic displays	48%	47%	1%

Source: Gloucestershire LTP Progress Report 2024-2025

Table 19: BSIP targets to exceed the national average by 2029

Satisfaction Indicator	Gloucestershire Score	National Average	Gap
State of bus stops	52%	55%	-3%
Personal safety on the bus	67%	65%	2%
Personal safety at bus stops	61%	60%	1%
Quality and cleanliness of buses	63%	61%	2%
Public transport information related to indicators	49%	50%	-1%
How easy buses are to get on and off	71%	70%	1%
Helpfulness of drivers	70%	67%	3%
Community Transport	54%	54%	0%

Source: Gloucestershire LTP Progress Report 2024-2025

Demand Responsive Network

In addition to the core bus network, a demand responsive, bookable bus service known as The Robin serves the rural areas of Gloucestershire. As shown in Figure 52, this service covers over 80% of rural Gloucestershire including Tewkesbury, North Cotswolds, South Cotswolds, Berkeley Vale, South Forest of Dean and Newent.

The Robin operates without fixed routes or timetables, allowing passengers to book a shared minibus journey within the defined zones via a mobile app, website or telephone. The service typically operates Monday to Saturday between 07:00 and 19:00.

The service has continued to grow since its launch in 2022 and has helped to increase bus accessibility in the more rural areas of the county. Figure 53 shows the increasing trend of the service patronage between 2024 and 2026, despite the service drop between October 2025 and June 2026.

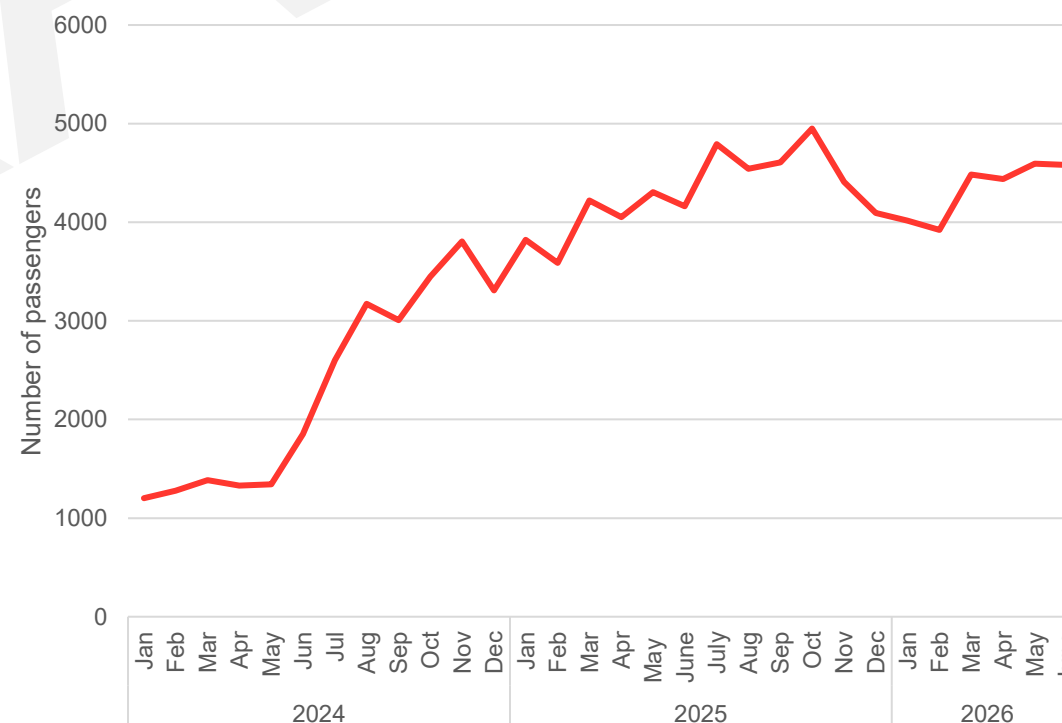
The Robin has a number of benefits including supporting first-mile-last-mile journeys to transport hubs where conventional public transport services are limited and supporting targeted service provision in locations where transport accessibility is more limited. The service also helps to reduce the reliance of some passengers on community transport, allowing community transport services to be focused on people with accessibility and mobility needs. The continuation of The Robin will be essential to provide social benefits and reduce social and spatial isolation in Gloucestershire.

Figure 52: The Robin Service Area



Source: Gloucestershire County Council

Figure 53: The Robin Patronage



Source: Gloucestershire County Council

Coach

Coach plays an important role in providing long distance road based public transport options and supports Gloucestershire's local bus network by providing connections to interchange hubs in the districts.

The majority of long distance coach services in Gloucestershire which provide an alternative travel choice to private car and train are mainly used for leisure and recreation purposes.

National Express operates routes connecting Gloucestershire with direct services to Bristol, Hereford, the West Midlands, Cardiff and London from Gloucester Transport Hub. These services run at least once daily.

Flixbus also operates routes connecting Gloucestershire with direct services to London, Bristol and Birmingham from Gloucester Transport Hub and Cheltenham Royal Well Bus Station. These services run at least once daily.



Community Transport

Community Transport plays a vital role in supporting accessibility and social inclusion across Gloucestershire, particularly in rural areas and for people who are unable to use conventional public transport. These services often act as a lifeline for older people, disabled people and those with mobility challenges, helping to improve access to essential services, reduce social isolation and support community wellbeing.

Community Transport complements the local bus and rail network by providing flexible and accessible services that help residents access healthcare, shopping, employment, education, leisure activities and social opportunities. Services range from demand-responsive 'dial-a-ride' operations and volunteer car schemes to community bus routes and group transport services, helping to address gaps where traditional fixed-route public transport is unavailable, infrequent or unsuitable.

The following Community Transport groups provide services in Gloucestershire.

- Bledington Care Committee
- Bream Voluntary Car Service
- Community Connexions (Gloucester, Cheltenham, Cotswolds and Stroud)
- Cotswold Friends
- Dursley & District Association (Transport for the Disabled and elderly)
- Hedgehog (Cotswolds routes)
- Lydney Dial-a-Ride
- Newent Dial-a-Ride
- The Villager (North Cotswolds routes)

Community Transport services complement conventional public transport and help ensure that residents can access the services, facilities and opportunities they need. As such, they form an important part of Gloucestershire's transport network, particularly in rural areas where access to regular public transport services may be limited.



Rail

Rail Network

There are nine railway stations serving Gloucestershire. They are Ashchurch for Tewkesbury, Cam and Dursley, Cheltenham Spa, Gloucester, Kemble, Lydney, Moreton-in-Marsh, Stonehouse, and Stroud (Gloucs). Table 20 sets out the destinations served from Gloucestershire railway stations and the associated journey times.

Table 20: Gloucestershire Railway Station Destinations and Journey Times

Railway Station		Destinations and Journey Times	
Cheltenham Spa	Northbound Birmingham (40-50 minutes) Manchester via Birmingham (2 hours 15 minutes – 2 hours 45 minutes) Worcester (35 minutes – 50 minutes)	Southbound Gloucester (10-15 minutes) Cardiff (1 hour 10 minutes – 1 hour 20 minutes) Bristol (40 minutes – 1 hour) London (1 hour 55 minutes – 2 hours 15 minutes)	
Gloucester	Northbound Cheltenham (10 – 15minutes) Birmingham (1hour 10 minutes – 1 hour 25 minutes) Worcester (50 minutes – 1 hour)	Southbound Bristol (50 minutes – 1 hour 10 minutes) Cardiff (1 hour 20 minutes – 1 hour 45 minutes) Newport (1 hour 10 minutes – 1 hour 25 minutes) London (1 hour 40 minutes – 2 hours 5 minutes)	
Stroud (Gloucs)	Eastbound Swindon (30 – 45 minutes) London (1 hour 15 minutes – 1 hour 35 minutes)	Westbound Gloucester (10 – 15 minutes) Cheltenham (20 – 30 minutes) Birmingham (1 hour 20 minutes – 1 hour 45 minutes)	
Kemble	Eastbound Swindon (15 – 20 minutes) London (1 hour 15 – 1 hour 35 minutes)	Westbound Gloucester (45 – 55 minutes) Cheltenham (55 – 65 minutes)	
Moreton-in-Marsh	Eastbound London (1 hour 30minutes – 1 hour 50 minutes)	Westbound Cheltenham (25 – 30 minutes) Gloucester (35 – 45 minutes)	
Cam and Dursley	Northbound Gloucester (20 – 25 minutes) Cheltenham (35 – 45 minutes) Birmingham via Gloucester (1 hour 40 minutes – 2 hours)	Southbound Bristol (25 – 35 minutes) Cardiff (1 hour 15 minutes – 1 hour 40 minutes)	
Lydney	Northbound Gloucester (25 – 35 minutes) Cheltenham (40 – 55 minutes) Birmingham (1 hour 40 minutes – 2 hours 10 minutes)	Southbound Chepstow (10 – 15 minutes) Newport (30 – 40 minutes) Cardiff (50 – 1 hour 10 minutes)	
Stonehouse	Northbound Gloucester (10 – 15 minutes) Cheltenham (20 – 30 minutes) Birmingham (1 hour 20 minutes – 1 hour 40 minutes)	Southbound Stroud (5 – 10 minutes) Swindon (40 – 55 minutes) London (1 hour 15 minutes – 1 hour 35 minutes)	
Ashchurch for Tewkesbury	Northbound Worcester (20 – 25 minutes) Birmingham (50 minutes – 1 hour 10 minutes) Nottingham (1 hour 45 minutes – 2 hour 15 minutes)	Southbound Cheltenham (10 minutes) Gloucester (20 – 25 minutes) Bristol (50 minutes – 1 hour) Cardiff (1 hour 20 minutes – 1 hour 40 minutes)	

Rail

Rail Passenger Journeys

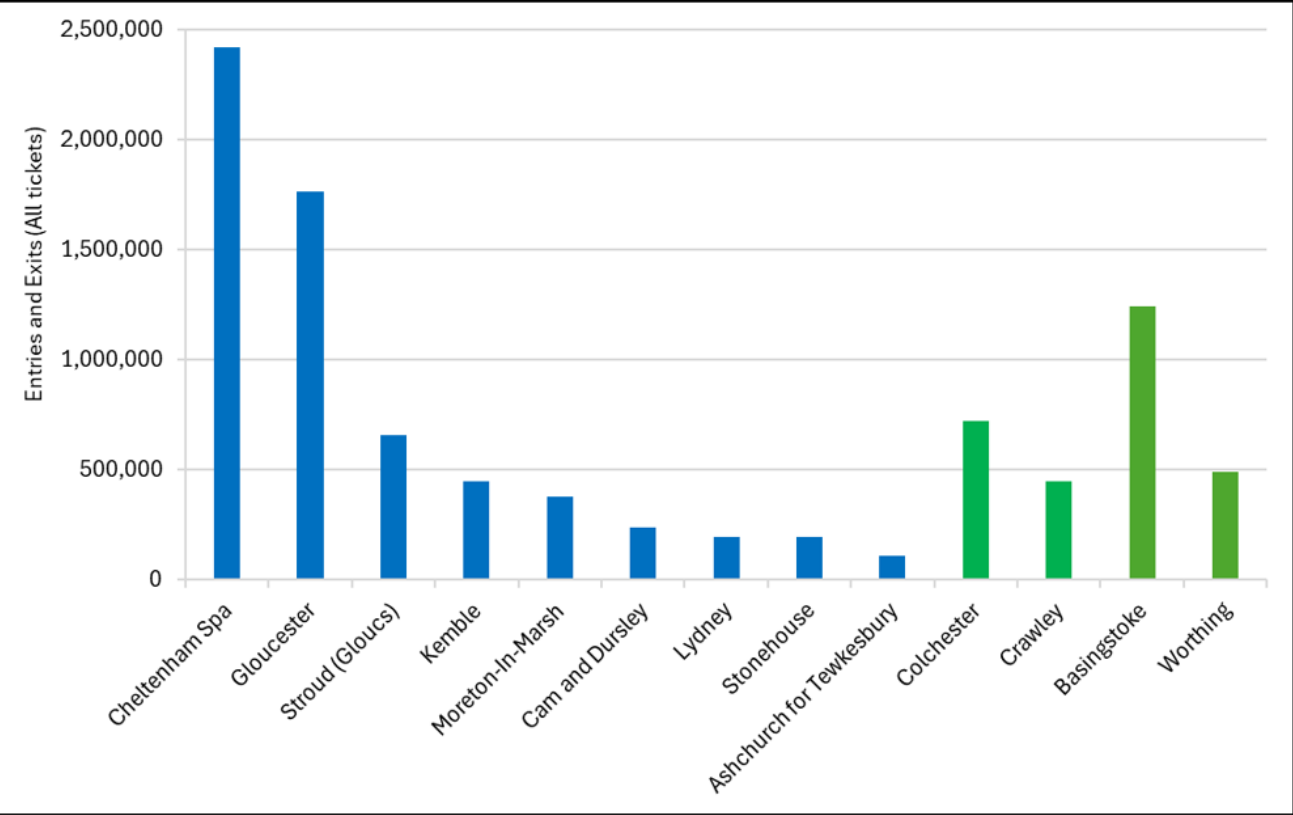
Cheltenham Spa Railway Station had the highest footfall between April 2024 and March 2025, accounting for 38% of all entries and exits (2,418,292 passengers) across the county. Gloucester Railway Station followed, accounting for 28% of all entries and exits (1,763,556 passengers) as shown Figure 54. Together, these two way stations represent approximately two thirds of all journeys in Gloucestershire. This shows a concentration of travel in the main urban areas, while journeys are comparatively low at way stations serving the market towns and more rural areas in the county.

When compared with way stations in similarly sized towns and small cities (based on 2021 Census population data) such as Colchester, Crawley, Basingstoke and Worthing, both Cheltenham Spa and Gloucester experience relatively high numbers of entries and exits. This suggests that, within their population bracket, Gloucestershire’s main stations are busier than their counterparts.

Table 21 sets out the change in total way station entries and exits between 2018-2019 and 2024-25, showing a 9% increase across Gloucestershire. This indicates an overall growth in demand. Usage remains highly concentrated at Cheltenham Spa and Gloucester way stations, although usage at Cheltenham Spa has declined (-2%). The greatest increase in station usage is at Moreton-in-Marsh (38%).

Rail demand in Gloucestershire has grown in recent years and has been concentrated in the main urban centres of Cheltenham and Gloucester. These stations dominate use within the county and perform strongly compared with stations in similarly sized locations across England.

Figure 54: Passenger entries, exits and interchanges by station



Source: Office of Rail and Road (Table 1410).

Table 21: Passenger entries, exits and interchanges by station, Great Britain, annual data, April 2018 to March 2019 and April 2024 to March 2025 (Office of Rail and Road, Table 1410).

Railway Station	2018/19	2024/25	Change %
Cheltenham Spa	2,467,768	2,418,292	-2
Gloucester	1,520,744	1,763,556	16
Stroud (Gloucs)	561,892	655,356	17
Kemble	387,798	444,760	15
Moreton-in-Marsh	273,018	375,804	38
Cam and Dursley	191,426	239,284	25
Lydney	198,752	194,028	-2
Stonehouse	166,144	193,140	16
Ashchurch for Tewkesbury	102,688	108,740	6
Total	5,870,230	6,392,960	9

Highway Network

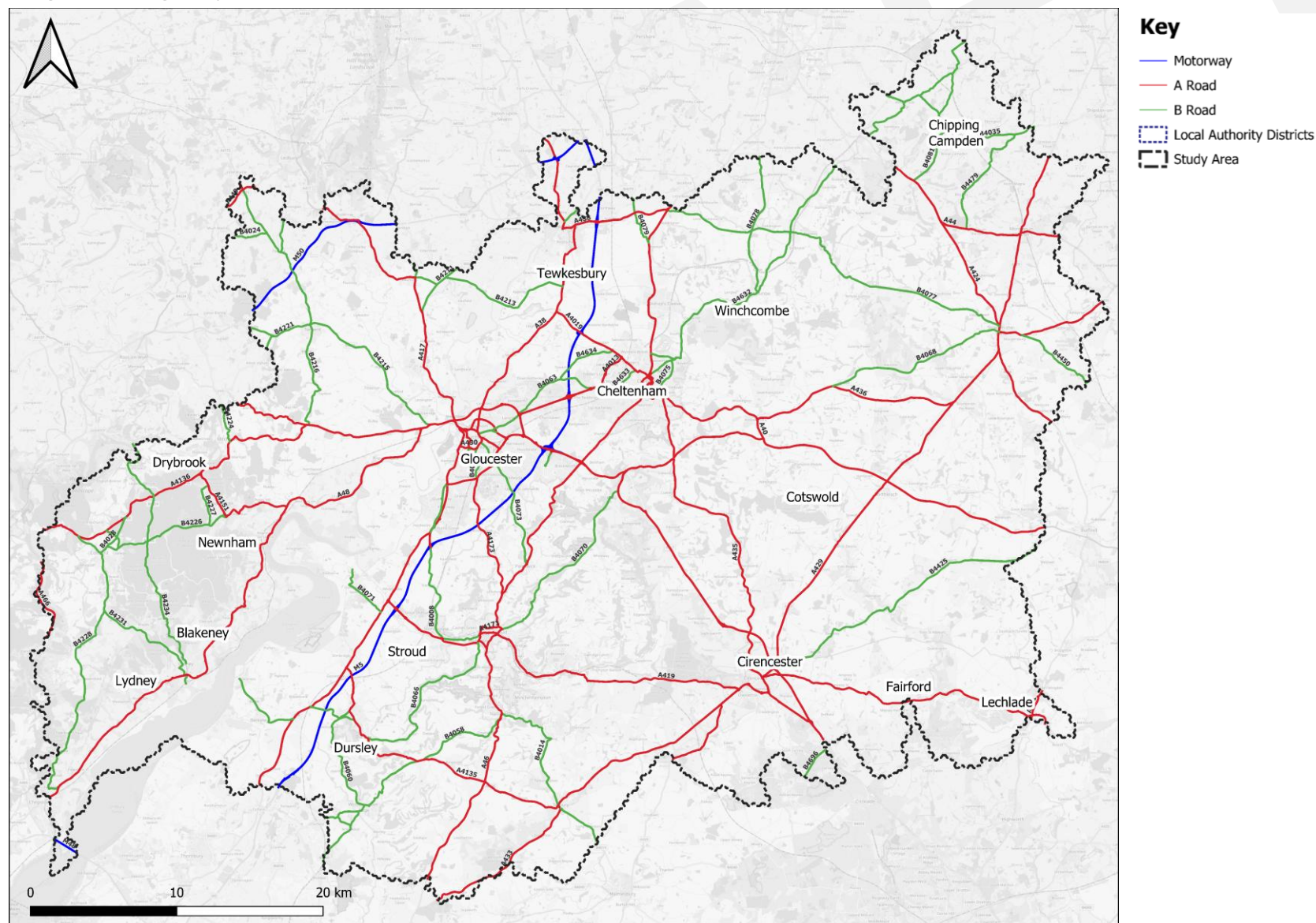
Highway Network

The M5 runs directly through Gloucestershire connecting the county to Bristol in the south and the West Midlands to the north. The M50 also runs from east to west through the Forest of Dean connecting Gloucestershire to Herefordshire.

Other key strategic links within the county include the A40, A417 and A46 which form part of the Strategic Road Network (SRN) and the A38, A40, A48, A436 and A4136 which form part of the Major Road Network (MRN).

Figure 55 presents the highway network in Gloucestershire including the strategic routes which make up the SRN and MRN.

Figure 55: Highway Network in Gloucestershire



Source: Ordnance Survey

Highway Network

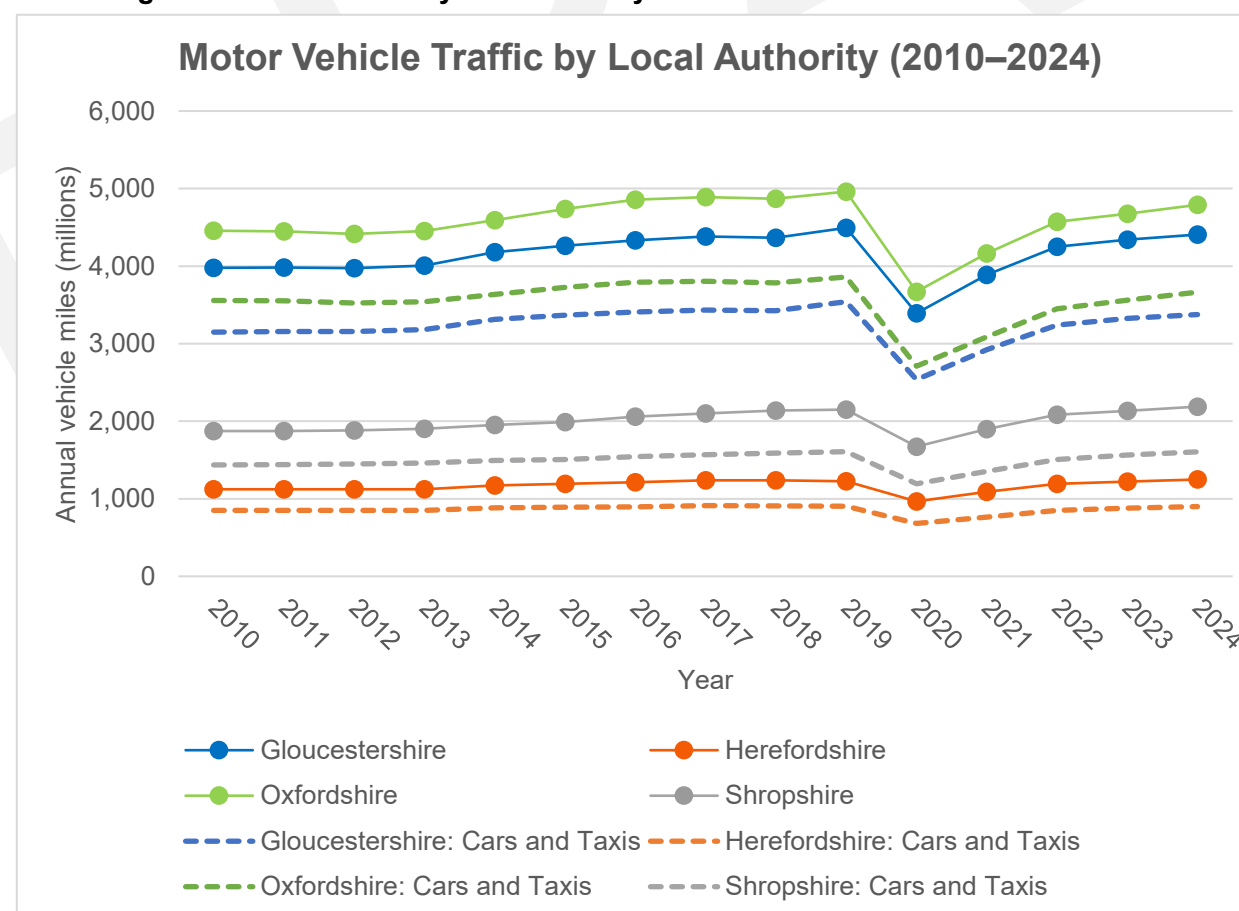
Vehicle Miles

Total vehicle miles travelled in Gloucestershire is presented in Figure 56. The data shows vehicle miles have increased by around 11% between 2010 and 2024, rising from 3,978 million to 4,408 million miles. This broadly aligns with population growth over a similar period, with Gloucestershire's population increasing by 12% between 2011 and 2024. This suggests that growth in travel demand has, to some extent, reflected the county's growing population.

However, vehicle miles peaked in 2019 at 4,494 million miles, before declining by around 2% between 2019 and 2024. Vehicle miles travelled were exceptionally low in 2020 across all local authorities due to the COVID-19 pandemic and lockdown restrictions, meaning people were not able to or chose not to travel as much as they usually would. There has been some recovery in this since the pandemic, however changes in working habits, travel behaviour, economic activity and wider post-pandemic impacts have kept vehicle miles below 2019 levels.

In 2024, 77% of all road traffic in Gloucestershire was made up of cars and taxis, with all other vehicle types, including Light Goods Vehicles (LGVs) and Heavy Good Vehicles (HGVs) making up the remaining 23%. Road traffic data has also been reviewed to comparable local authorities including Shropshire, Herefordshire and Oxfordshire. Road traffic in Gloucestershire falls roughly in line with that of Oxfordshire (4,790 million miles in 2024), However, significantly more vehicle miles are travelled in Gloucestershire than Herefordshire (1,249 million miles in 2024) and Shropshire (2,189 million miles in 2024). This shows strong variation between local authorities, suggesting vehicle miles travelled may be influenced by local factors such as road network extent, demographics and attitudes towards travel.

Figure 56: Local authority road traffic by vehicle class from 2010 to 2024



Source: Department for Transport, Road Traffic Statistics.

Highway Network

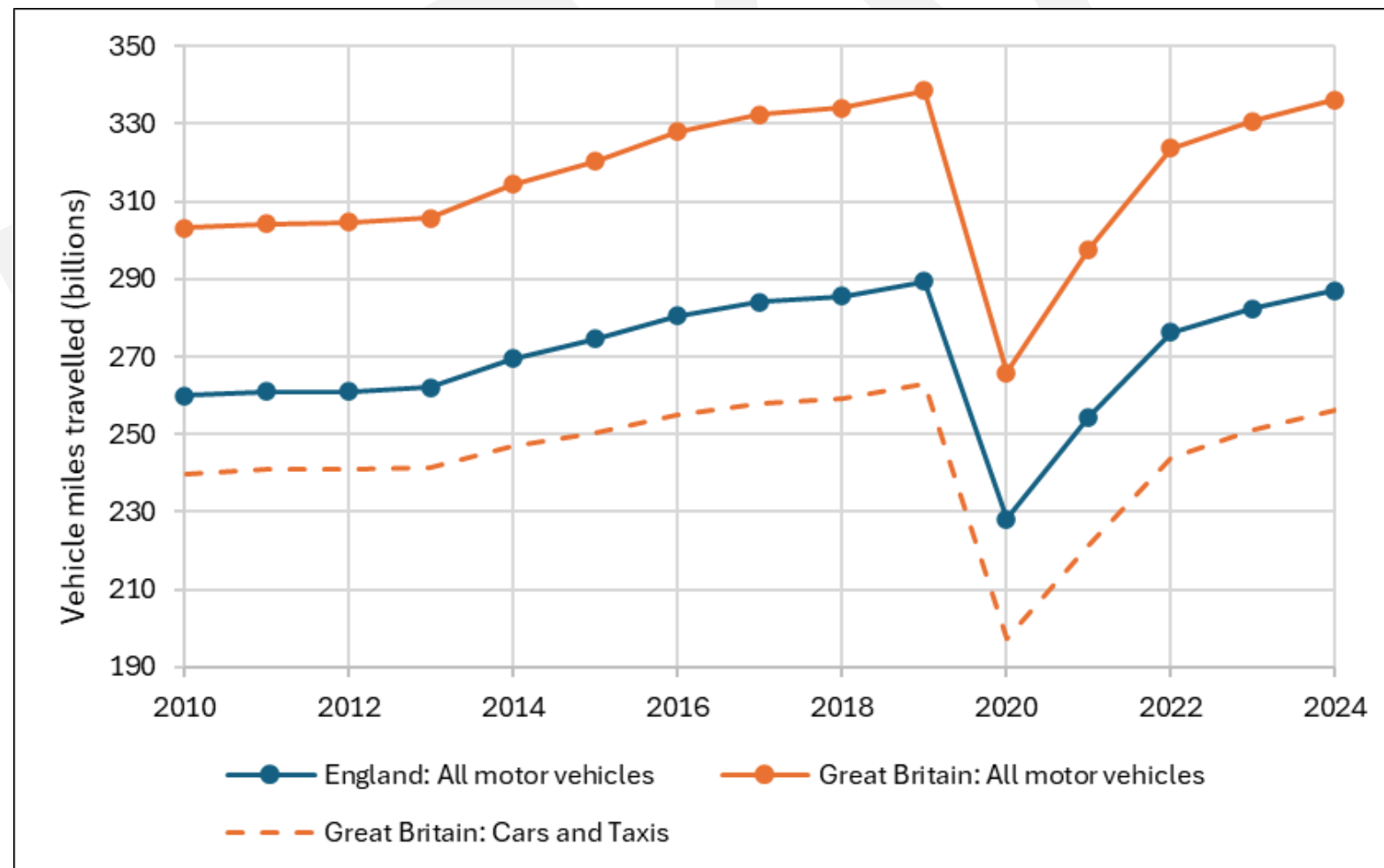
Vehicle Miles

Figure 57 shows the national averages for vehicle miles travelled (both England and Great Britain as a whole). The data shows a similar trend whereby vehicle miles have increased since 2010 and dipped in 2020, before returning to just below 2019 levels in 2021. For example, vehicles miles travelled in Great Britain increased from 303 billion miles (of which 260 billion were in England) in 2010 to 336 billion miles (of which 287 billion were in England) in 2024, also showing an 11% increase in Great Britain as a whole and a 10% increase in England.

In 2024, 76% of all road traffic in Great Britain was made up of cars and taxis, showing Gloucestershire is roughly in line with the national average in terms of road traffic by vehicle class.

The baseline for total vehicle miles in Gloucestershire has shifted upwards over time, reflecting increased travel demand, which is also reflected in the national averages and that of similar local authorities. Increasing traffic levels have implications for transport related emissions and for congestion on the road network and presents an opportunity to enhance sustainable transport alternatives to encourage mode shift.

Figure 57: Road traffic by vehicle class from 2010 to 2024



Source: Department for Transport, Road Traffic Statistics.

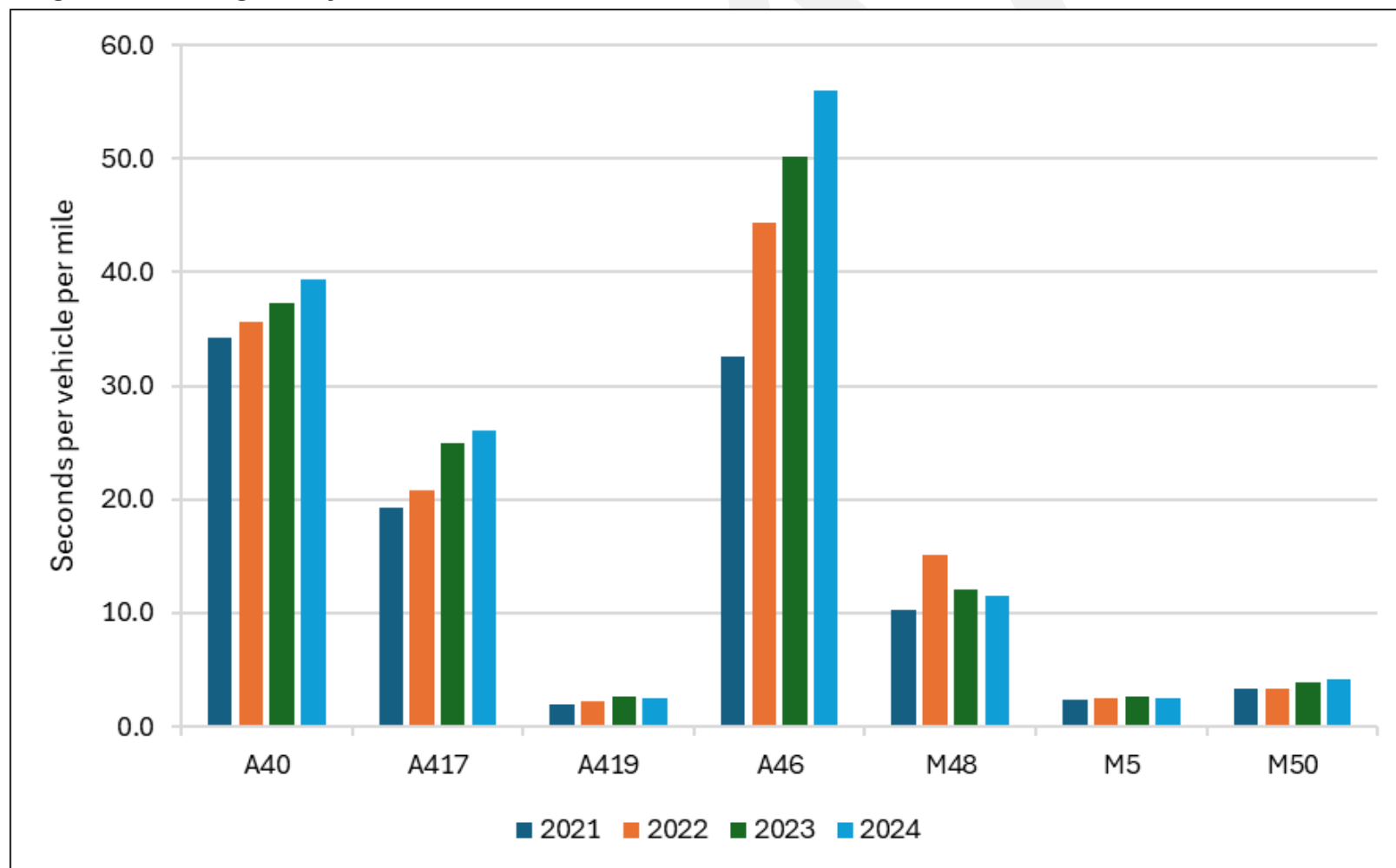
Highway Network

Vehicle Reliability

Figure 58 shows that the A46, A40, and A417 have all experienced notable increases in average annual delay. For example, delays on the A46 increased by 23.5 seconds per vehicle per mile from 32.5 seconds per vehicle per mile in 2021 to 56 seconds per vehicle per mile in 2024, while the A40 increased by 5.1 seconds per vehicle per mile and the A417 increased by 6.8 seconds per vehicle per mile. The M48 exhibited some fluctuation, peaking at 15.2 seconds per vehicle per mile in 2022. Similarly, the A419, M5, and M50 remained relatively stable, with minor year-on-year changes.

The data shows clear disparities in delays across Gloucestershire's strategic road network. Longer journey times negatively affect users, undermining public transport reliability and making schedules less predictable. Additionally, these increases in delay not only disrupt individual journeys but also hinder overall connectivity across Gloucestershire. The uneven delays on key routes can fragment access between towns, reduce the efficiency of vehicle movements, and make regional travel less reliable, ultimately affecting economic activity and community cohesion.

Figure 58: Average delay at link level on the SRN



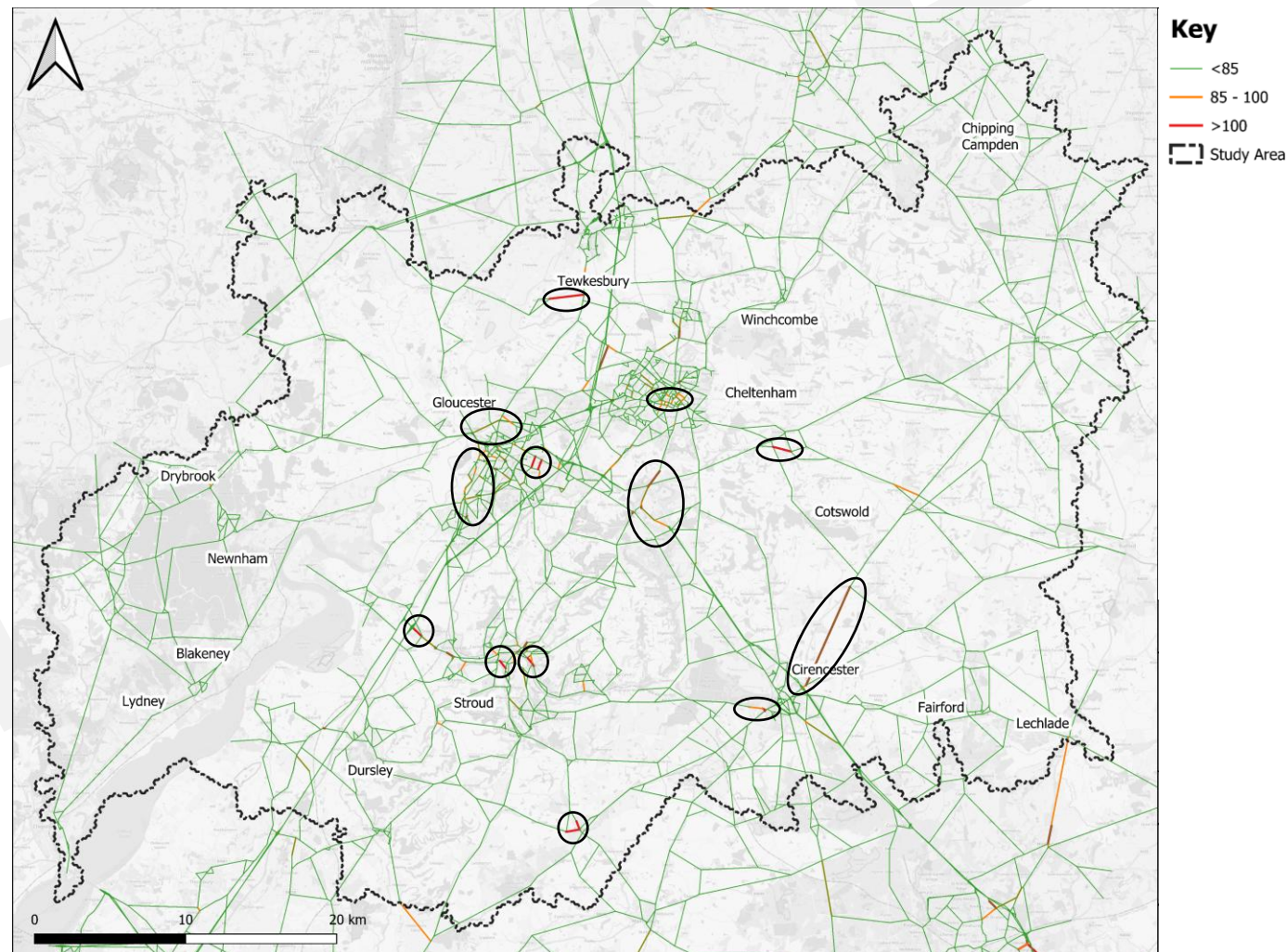
Source: National Highways National Traffic Information Service (CGN0405d).

Highway Network

Congestion Hotspots

Congestion hotspots across Gloucestershire's highway network is displayed in Figure 59. The figure shows congestion hotspots across Gloucestershire are concentrated within and around the county's largest urban areas, particularly Gloucester, Cheltenham, Stroud and Cirencester, where higher traffic volumes and competing demands for road space result in slower journey speeds and increased delays. The most significant hotspots are located on key corridors linking Gloucester, Cheltenham, Tewkesbury and Cirencester, reflecting the strong commuting and economic connections between these areas. Outside the main urban areas, congestion is generally more limited and tends to occur at specific locations where network capacity is constrained or where traffic converges on key routes.

Figure 59: Volume/Capacity – Congestion Hotspots (2019)



Highway Network

Highway Network Condition

The principal road network (PRN), which includes all of Gloucestershire's A roads, provides significant regional and district road connectivity. The PRN is particularly important economically, and its condition impacts on network resilience and safety. Approximately 50% of the PRN is surveyed in both directions, every year. The target for the percentage of the PRN requiring maintenance is 4%.

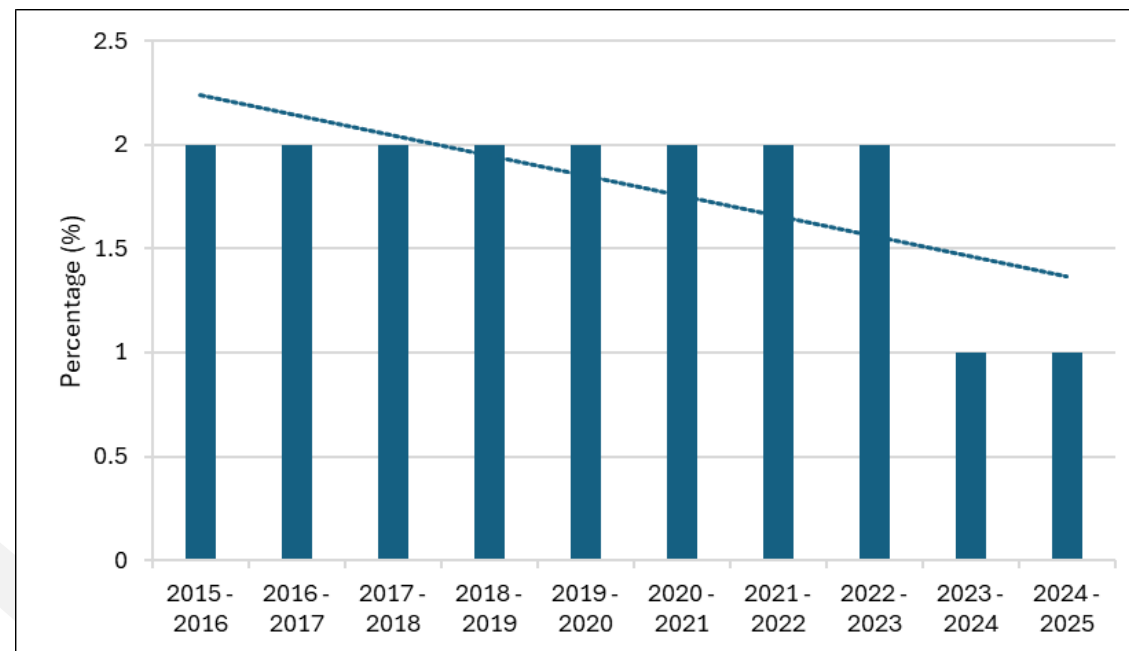
Figure 60 shows that between 2024 and 2025, only 1% of the PRN required maintenance. This figure has remained consistently low and well within the 4% target, with 2% of the PRN requiring maintenance between 2015/16 and 2022/23.

Non-principal roads are designated as B and C roads. In Gloucestershire there are 1,966 km of classified non-principal roads. These are main and secondary routes, linking urban centres, larger villages, and freight to the wider network. Preserving the condition of these routes ensures access and journey times are maintained into key service areas for health, education, retail, and employment. Approximately 50% of the non-principal road network is surveyed in both directions, every year. The target for the percentage of the non-principal road network requiring maintenance is 9%.

Figure 61 shows that the non-principal road network in Gloucestershire is within the 9% target, with 4% of the network requiring maintenance. This has been consistently below the target overtime, peaking at only 6% in 2018/19.

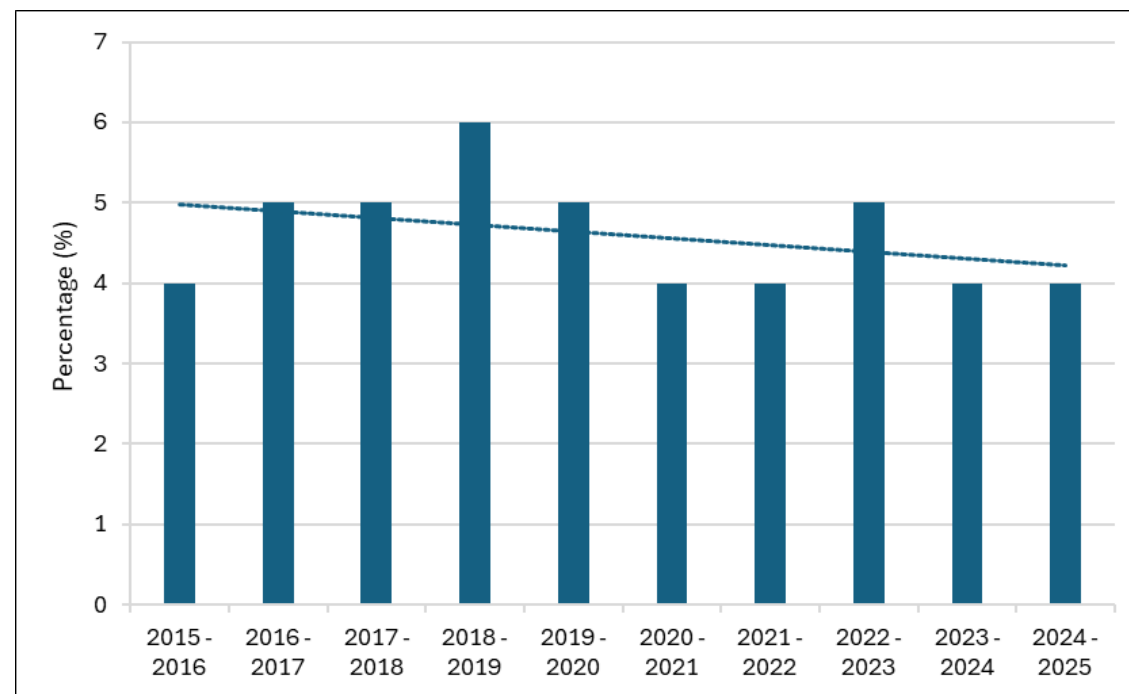
These targets support a well maintained and resilient highway network in Gloucestershire which can be used to reliably carry people and goods.

Figure 60: Percentage of A Roads where maintenance should be considered by LA's



Source: Department for Transport (RDC0120 A Roads and Motorways)

Figure 61: Percentage of B and C Roads where maintenance should be considered by LA's



Source: Department for Transport (RDC0120 B and C Roads)

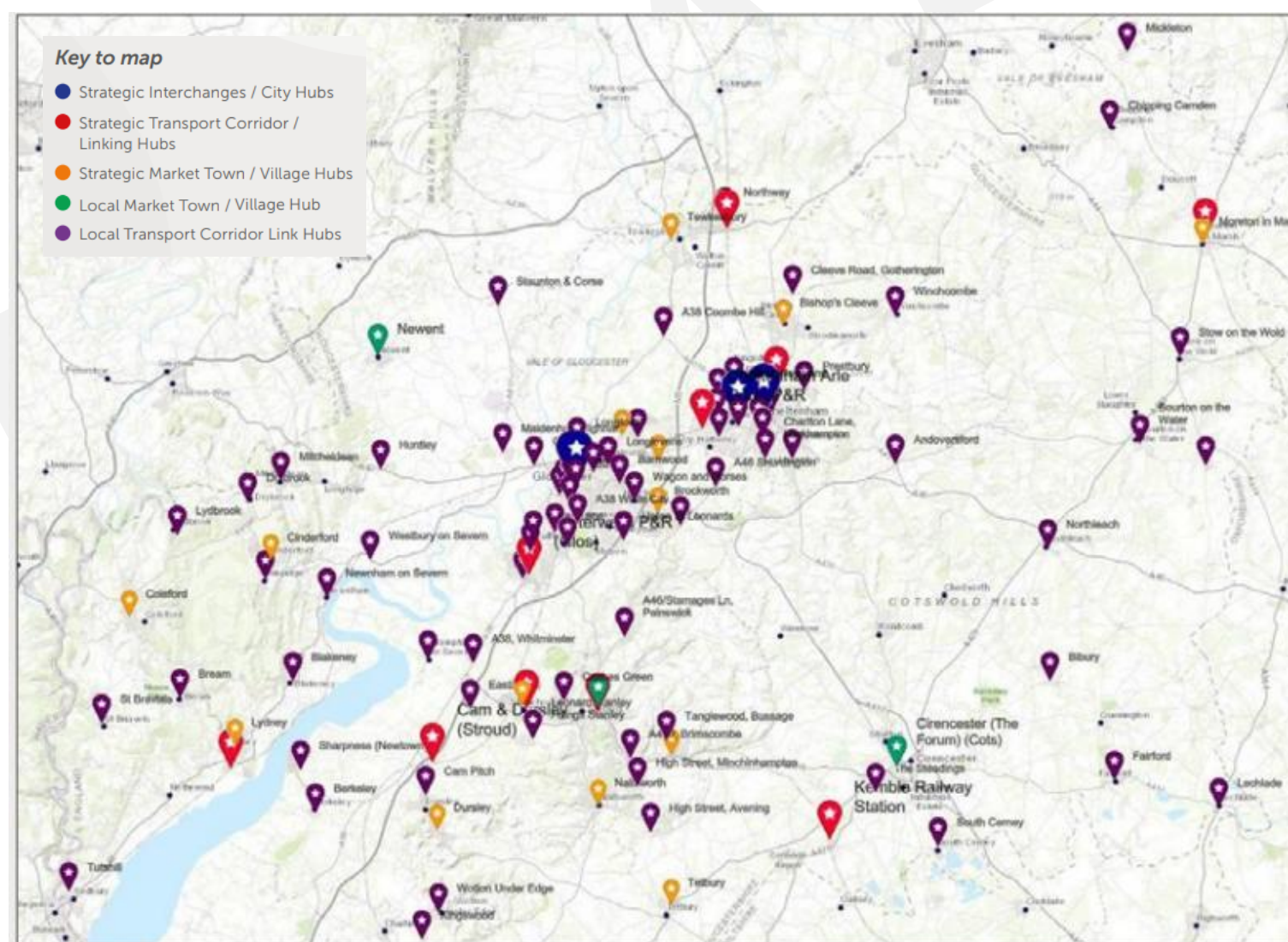
Interchange

Transport Interchange Hubs

Gloucestershire has over 6,700 bus stops, varying in size and quality from simple roadside points to major transport hubs such as Gloucester Transport Hub and Arle Court Park & Ride. The infrastructure at these stops is inconsistent, with some lacking basic features such as timetable cases and clear signage. In 2023, a study was completed to guide future investment in interchange hubs, identifying new locations and prioritising them for funding and further feasibility work, presented in Figure 62.

Although recent surveys show Gloucestershire performs slightly above the national average for personal safety on buses and at stops, there remains a notable level of concern among travellers. Addressing both actual and perceived safety issues at bus stops and on buses is recognised as an essential focus within the Bus Service Improvement Plan (BSIP), with funding set aside to enhance interchange infrastructure and promote safer, more reliable public transport across the county.

Figure 62: Gloucestershire indicative Interchange Hub Locations



Source: Gloucestershire BSIP

Freight

Freight Network

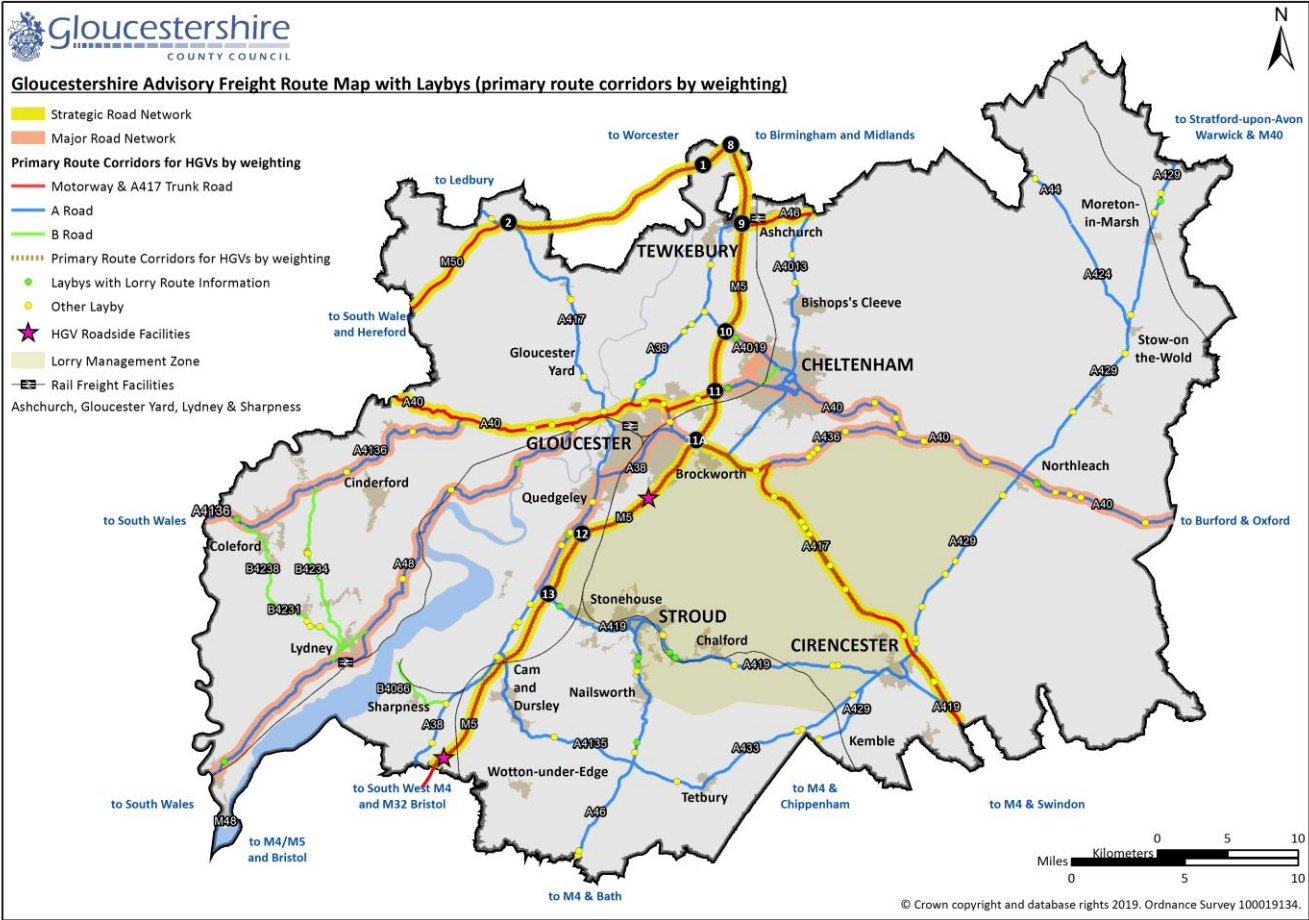
Freight journey time reliability and freight routing are key issues in Gloucestershire. To support this challenge, there is a primary freight network in place to help traffic getting from A to B in the most effective and efficient manner. Figure 63 presents the Advisory Freight Route Map which mirrors freight traffic flows in the county.

The Advisory Freight Route Map identifies the primary route corridors for HGV's in the county which also form part of the SRN. These are M5, M50, A40, A417 and A46. The map also identifies layby sites, HGV roadside facilities and freight facilities. Laybys with lorry route information are limited to the A429, A40, A419, A46 and A48 with HGV roadside facilities provided on the M5 only. Other laybys are more evenly distributed across the county located along the SRN and MRN routes. Rail freight facilities are located near Ashchurch, Gloucester and Lydney.

Freight Facilities

Within the South West there are 670 freight parking sites including 44 on site facilities, 548 laybys and 78 industrial estates. The total capacity of the on site locations is 1,466 with a utilisation in 2022 of 64%. The DfT's National Survey of Lorry Parking identified that there was an excess of 187 freight vehicles in the South West against on site capacity.

Figure 63: Gloucestershire Advisory Freight Route



Source: Gloucestershire County Council

Table 22: South-West Regional Overview

	On site	Laybys	Industrial Estates	Total
Number of sites	44	548	78	670
Capacity	1,466	-	-	-
Total number of vehicles parked	932	479	242	1,653
Utilisation	64%	-	-	-
Excess vehicles	-	-	-	187

Source: DfT National Survey of Lorry Parking, 2022

Freight

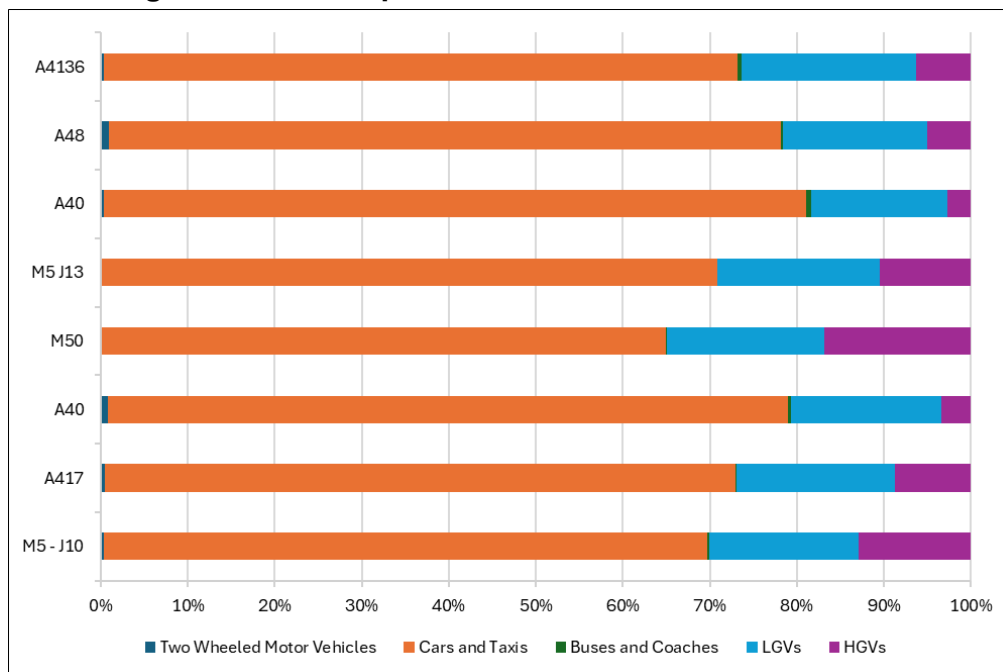
Freight Mode Split

Together, Light Goods Vehicles (LGVs) and Heavy Goods Vehicles (HGVs) make up between 21% and 30% of traffic on the Strategic and Major Road Networks in Gloucestershire as shown in Figure 64. Approximately 89% of all domestic freight in Gloucestershire travels by road.

The proportion of LGVs on all roads is relatively consistent, varying only between 16% and 20%. However, there is more variation in the proportion of HGVs between the different roads, with the Strategic Road Network (SRN) seeing the highest proportion. The proportion of HGVs on the M50 in 2024 was 17%, while the proportion of HGVs on the A40 was only 3%.

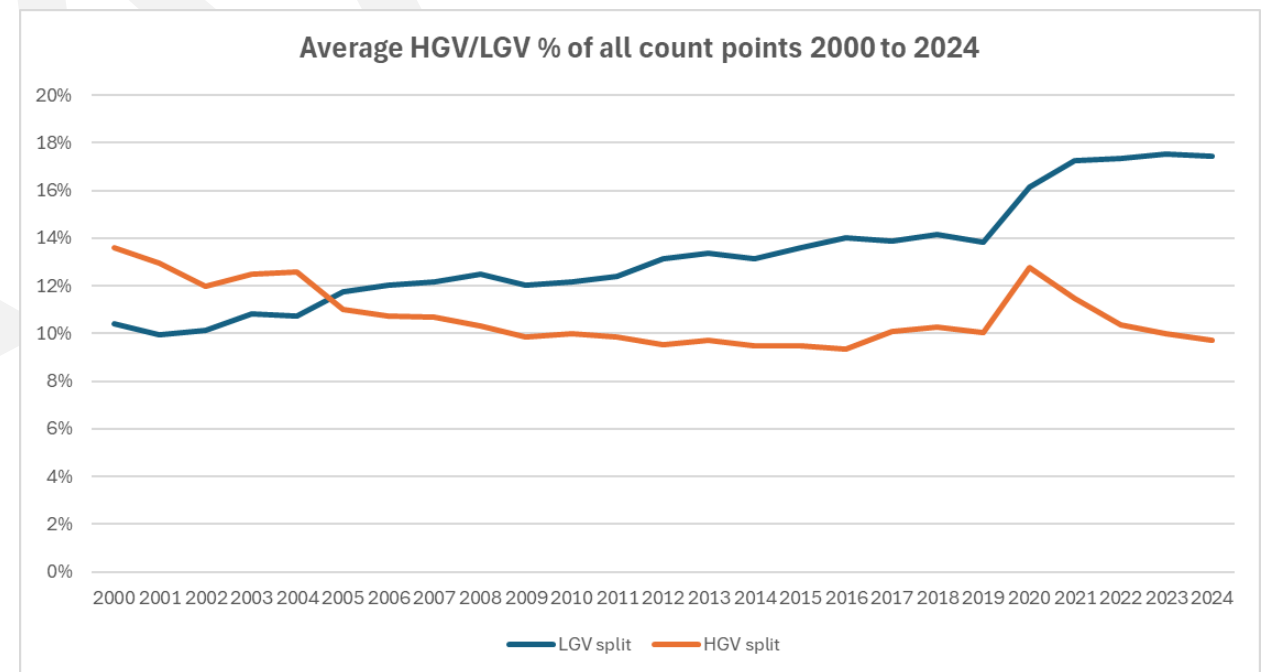
The proportion of HGVs and LGVs on the SRN and Major Road Network (MRN) has increased by 3% between 2000 and 2024. In Figure 65, 2020 shows a significant peak in the proportion of Goods Vehicles, although this is likely to be due to the smaller proportion of cars and taxis as a result of the COVID-19 pandemic.

Figure 64: Mode Split on SRN and MRN Routes



Source: Department for Transport Road Traffic Statistics

Figure 65: HGV and LGV Mode Split on SRN and MRN in 2024



Source: Department for Transport Road Traffic Statistics

Transport Connectivity

DfT Connectivity Tool

Table 24 identified that Gloucestershire has an overall score of 43.89 out of 100 due to the differing levels of connectivity across the county. Figure 66 demonstrates that the more urban areas of Gloucester and Cheltenham have a score of approximately 70-80 out of 100 for transport connectivity to essential services. Stroud and Tewkesbury also have a relatively high transport connectivity score of approximately 50 out of 100. However, in the more rural areas of Gloucestershire, such as Cotswold the transport connectivity score is just under 40.

Within Gloucestershire, access to employment has the lowest overall combined scores across the county and shopping has the highest as shown in Table 23.

Table 23: Connectivity Scores by Destination Type

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	40.72	48.97	36.46	65.66	44.38
Leisure	44.70	54.15	43.43	76.27	44.34
Healthcare	39.52	47.68	35.33	71.93	41.92
Shopping (Retail)	49.12	58.13	47.43	78.75	49.59
Residential	45.44	54.37	47.89	79.23	40.75
Workplace (Employment)	37.98	46.49	33.36	71.94	37.44

Source: DfT Connectivity Mapping Report

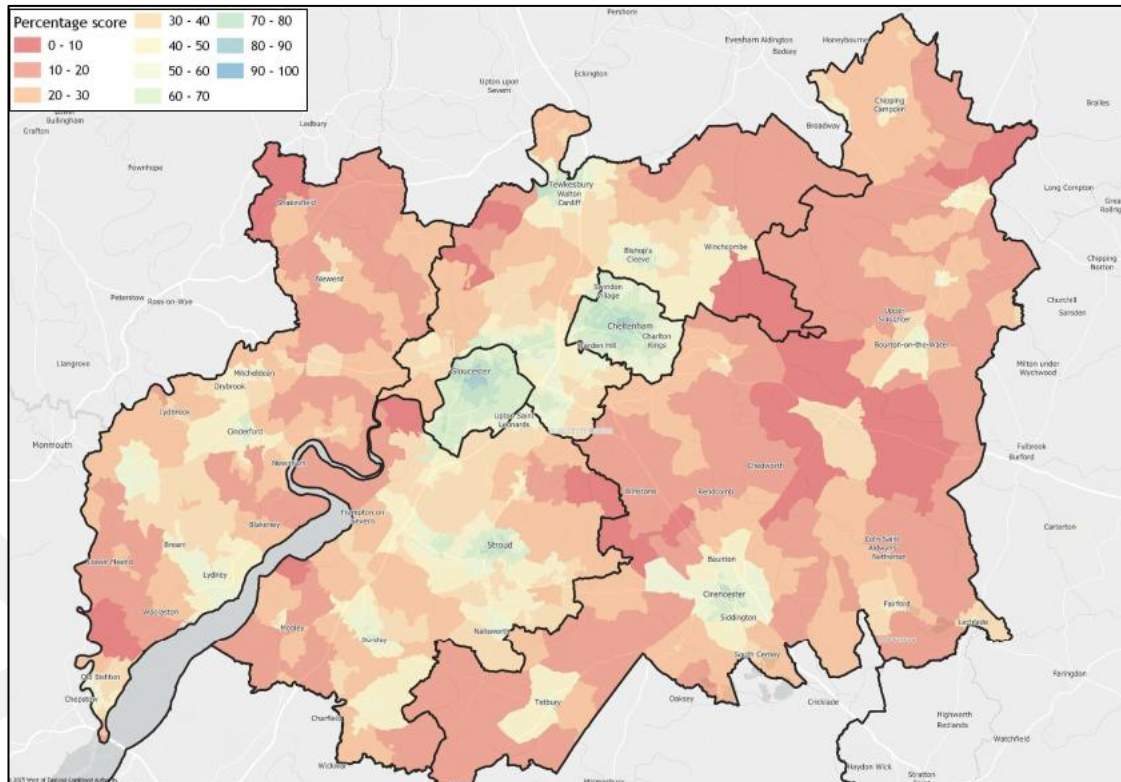
The combined scores in Table 24 indicate that the most connected location in the county is around Gloucester Railway Station and the Transport Hub in the centre of Gloucester. In contrast, the least connected locations are predominately small rural villages such as Todenham, Notgrove & Turkdean, Aldsworth and Bevington.

Table 24: Connectivity Scores Summary

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	43.89	84.12 (Gloucester Transport Hub)	2.95 (Todenham, Cotswold)
Cycling	51.22	82.14 (Gloucester Transport Hub)	18.40 (Notgrove & Turkdean, Cotswold)
Driving	76.27	92.85 (Gloucester Transport Hub)	38.03 (Aldsworth, Cotswold)
Public Transport	43.41	82.69 (Gloucester Transport Hub)	1.93 (Todenham, Cotswold)
Walking	42.86	87.21 (Gloucester Transport Hub)	0.81 (Bevington, Stroud)

Source: DfT Connectivity Mapping Report

Figure 66: DfT Connectivity – Gloucestershire



Source: DfT Connectivity Mapping Report

The DfT Connectivity Tool measures how well locations are connected to key services such as employment, health, educational and retail via walking, cycling, public transport or private vehicle. Places are given a score out of 100.

Transport Connectivity

Cheltenham

Within Cheltenham, Table 25 identified that access to workplaces has the lowest overall score (60.71/100), with the highest score for shopping (77.54/100). The scores overall reflect good connectivity to services across a predominately built-up area, as demonstrated in Figure 67.

Overall, walking and cycling have a relatively high connectivity score of between 60-90 out of 100 which reflects the urban nature of the district and the active travel provision. Public transport has a connectivity score of between 60-80 out of 100 which reflects the nature of the Cheltenham as a key urban centre in Gloucestershire. Driving has a high connectivity score overall.

The centre of Cheltenham close to the main high street regularly performs the strongest in terms of connectivity. As displayed in Table 26, the area around Clarence Street near where the main coach station and local bus services terminate is the area which has the highest connectivity score. In contrast, the areas of Daisy Bank and Noverton Lane have lower connectivity.

Table 25: Connectivity Scores by Destination Type

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	63.54	79.01	55.92	81.77	70.12
Leisure	72.33	82.25	68.53	87.79	74.11
Healthcare	70.63	79.31	64.54	85.55	74.21
Shopping (Retail)	77.54	83.60	75.57	90.48	78.45
Residential	69.79	73.67	75.30	82.81	62.61
Workplace (Employment)	60.71	65.12	57.28	75.78	60.50

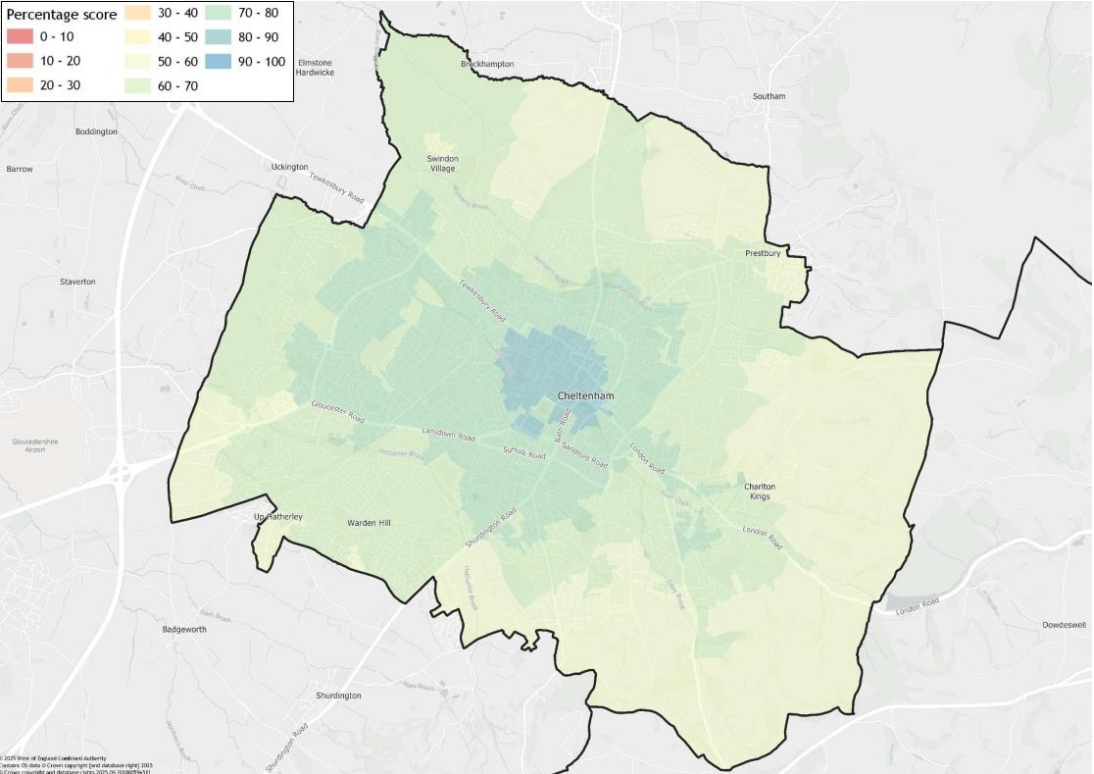
Source: DfT Connectivity Mapping Report

Table 26: Connectivity Scores Summary

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	69.74	82.58 (Clarence Street, Cheltenham)	50.76 (Daisy Bank)
Cycling	74.51	81.72 (Sherborne Place, Cheltenham)	63.73 (Noverton Lane, Prestbury)
Driving	85.86	91.37 (Clarence Street, Cheltenham)	72.75 (Persimmon Gardens, Springbank)
Public Transport	69.81	81.43 (Clarence Street, Cheltenham)	52.18 (Daisy Bank)
Walking	68.39	84.42 (High Street/Grosvenor Street, Cheltenham)	44.64 (Noverton Lane, Prestbury)

Source: DfT Connectivity Mapping Report

Figure 67: DfT Connectivity – Cheltenham



Source: DfT Connectivity Mapping Report

Transport Connectivity

Cotswold

Within the Cotswold district, Table 27 identified access to workplace has the lowest overall score (33.33/100). Connectivity to education (34.47/100) and healthcare (35.37/100) also perform poorly. The highest connectivity scores across the district are from shopping (44.02/100). Leisure (40.45/100) connectivity also performs relatively well. The connectivity scores however are relatively low compared to other districts in the county and reflect the rural nature of the Cotswold district. This is demonstrated in Figure 68.

Overall, walking and cycling have a relatively low connectivity score to destinations of between 30-60 out of 100. Public transport also has a low connectivity score of between 30-50 out of 100 which reflects the low frequency of bus services serving the Cotswold district. Driving has a relatively high score however, connectivity to education and healthcare are lower than other destinations which is likely due to the available provision in the district.

Table 27: Connectivity Scores by Destination Type

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	34.47	41.85	32.25	59.25	35.81
Leisure	40.45	49.63	40.70	74.11	38.79
Healthcare	35.37	43.57	33.26	68.02	36.15
Shopping (Retail)	44.02	52.15	43.38	74.39	43.65
Residential	39.38	49.40	42.04	78.20	34.39
Workplace (Employment)	33.33	43.03	32.02	71.06	32.02

Source: DfT Connectivity Mapping Report

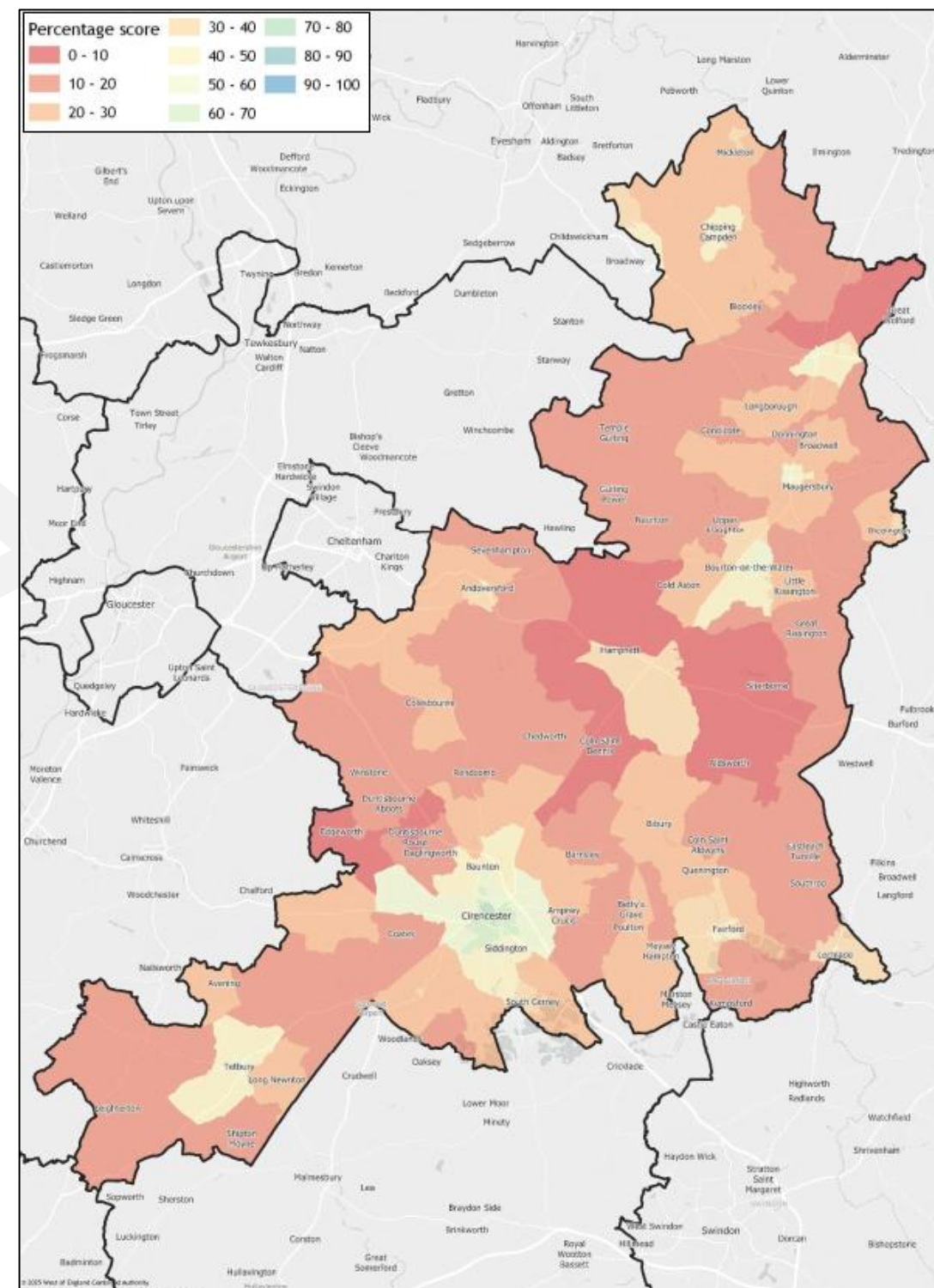
As identified in Table 28, the centre of Cirencester is consistently the highest scoring area in Cotswold across all modes. In contrast, the areas with worst connectivity are rural villages including Todenham, Alsdworth, Notgrove & Turkdean.

Table 28: Connectivity Scores Summary

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	38.68	73.25 (The Forum, Cirencester)	2.95 (Todenham)
Cycling	46.48	68.84 (The Forum, Cirencester)	18.40 (Notgrove & Turkdean)
Driving	73.33	88.5 (Hammond Way, Cirencester)	38.03 (Alsdworth)
Public Transport	37.19	68.56 (Cricklade Street, Cirencester)	1.93 (Todenham)
Walking	38.90	79.99 (The Forum, Cirencester)	3.73 (Notgrove & Turkdean)

Source: DfT Connectivity Mapping Report

Figure 68: DfT Connectivity – Cotswold



Source: DfT Connectivity Mapping Report

Transport Connectivity

Gloucester

Within Gloucester, access to workplaces has the lowest overall score (59.36/100), as identified in Table 29 . The highest connectivity score across the district is for shopping (74.77/100). The scores overall reflect good connectivity to services across the predominately built-up area, which is demonstrated in Figure 69.

Overall, walking and cycling have a relatively high connectivity score to destinations of between approximately 54-82 out of 100 which reflects the urban nature of the district and the active travel provision. Public transport has a connectivity score of between approximately 59-76 out of 100 which reflects the nature of the Gloucester as a key urban centre in Gloucestershire. Driving has a high connectivity score overall.

Table 29: Connectivity Scores by Destination Type

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	70.39	79.64	64.08	82.23	76.04
Leisure	67.60	77.72	62.69	84.84	70.32
Healthcare	64.48	72.04	56.58	82.16	69.64
Shopping (Retail)	74.77	81.54	72.80	89.28	75.63
Residential	68.86	73.40	73.93	83.36	62.02
Workplace (Employment)	59.36	64.39	54.68	76.18	59.46

Source: DfT Connectivity Mapping Report

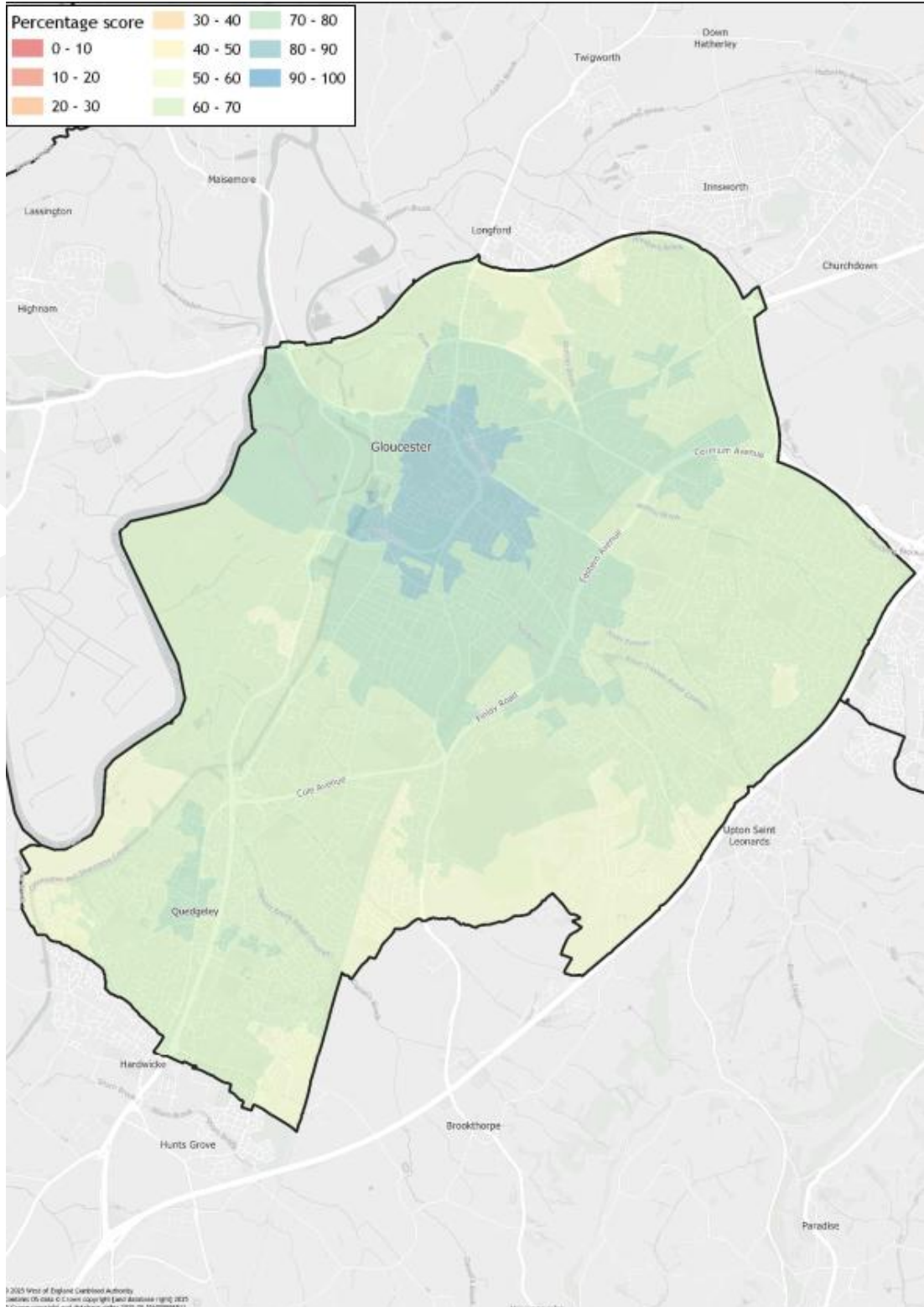
Table 30 shows the centre of Gloucester close to the railway station and transport hub performs the strongest in terms of connectivity. In contrast, several areas in the south of the city, in Quedgeley perform lower.

Table 30: Connectivity Scores Summary

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	68.98	84.12 (Gloucester Railway Station)	53.42 (Stephenson Drive, Quedgeley)
Cycling	73.07	82.14 (Gloucester Railway Station)	62.61 (Rea Swing Bridge)
Driving	84.91	92.85 (Gloucester Railway Station)	73.89 (Briar Lawn, Wheatway)
Public Transport	68.96	83.69 (Gloucester Transport Hub)	54.37 (Stephenson Drive, Quedgeley)
Walking	67.89	87.21 (Gloucester Transport Hub)	47.67 (Gloucester Golf Club)

Source: DfT Connectivity Mapping Report

Figure 69: DfT Connectivity – Gloucester



Source: DfT Connectivity Mapping Report

Transport Connectivity

Forest of Dean

Within the Forest of Dean, access to workplaces has the lowest overall score (32.21/100) in the district, as identified in Table 31. The highest scores are for shopping (46.81/100). The connectivity scores however are relatively low compared to other districts in the county and reflect the rural nature of the Forest of Dean, as demonstrated in Figure 70.

Overall, walking and cycling have a relatively low connectivity score of between 27-58 out of 100. Public transport also has a low connectivity score of between 30-50 out of 100 which reflects the low frequency of bus services serving the Forest of Dean. Driving generally has a relatively high score to all destinations.

Table 31: Connectivity Scores by Destination Type

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	36.64	45.03	31.51	66.22	41.42
Leisure	41.47	51.03	40.53	75.40	40.80
Healthcare	35.01	43.18	30.94	73.22	37.36
Shopping (Retail)	46.81	55.84	45.05	79.24	47.36
Residential	42.65	51.19	45.03	76.71	38.15
Workplace (Employment)	32.21	40.47	27.38	68.99	31.84

Source: DfT Connectivity Mapping Report

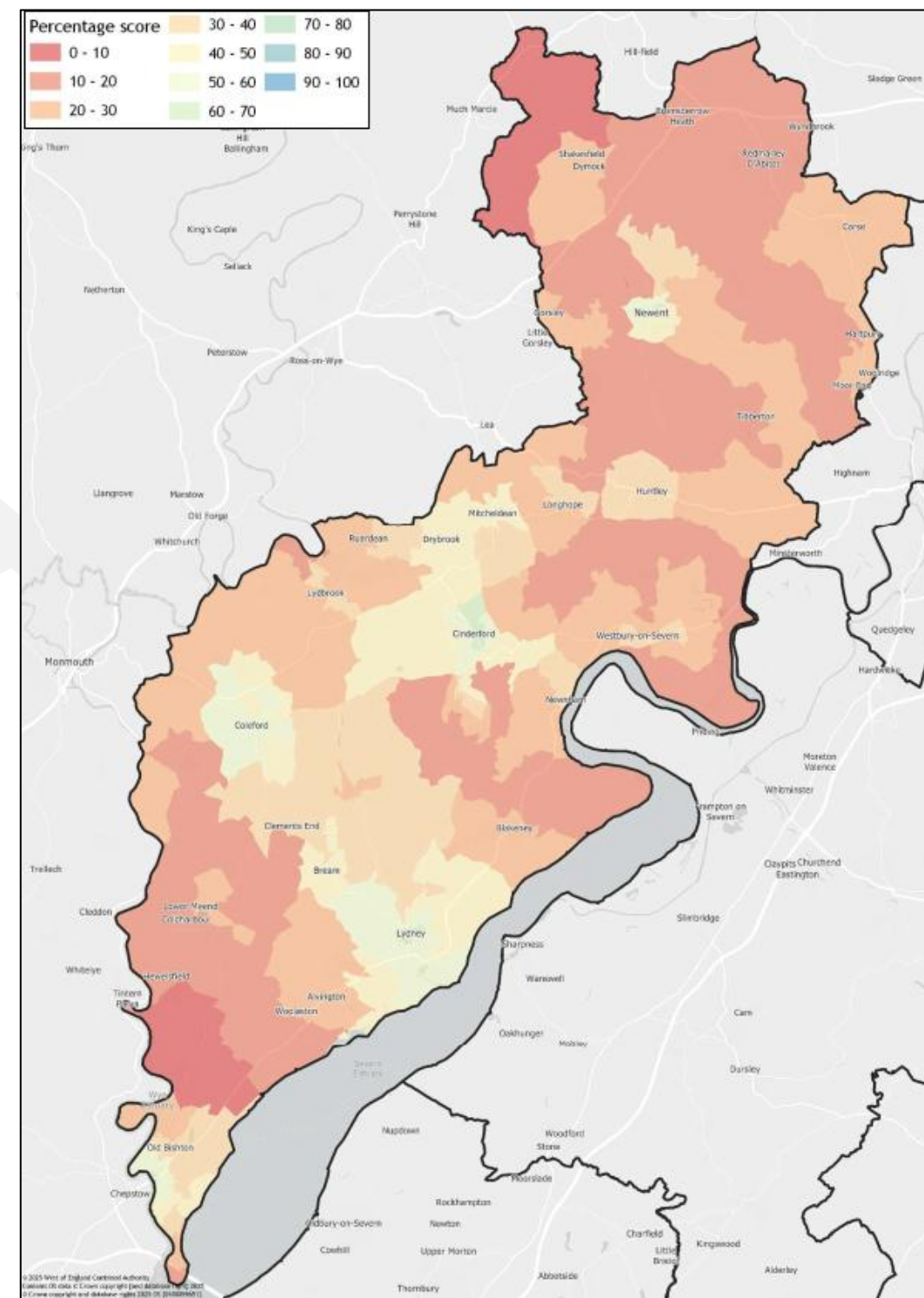
Table 32 shows that the centre of Cinderford close to the main high street regularly performs the strongest in terms of connectivity within the district, principally led by high levels of walking and cycling connectivity. In contrast, the area of Tidenham Chase, close to the River Wye performs poorly in terms of overall connectivity, alongside other rural areas in the district such as Kempley and High Woolaston.

Table 32: Connectivity Scores Summary

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	40.05	62.88 (High Street and Market Street, Cinderford)	7.76 (Tidenham Chase)
Cycling	46.80	61.06 (High Street and Market Street, Cinderford)	24.40 (High Woolaston)
Driving	75.36	85.59 (High Street and Market Street, Cinderford)	55.88 (Tidenham Chase)
Public Transport	39.69	59.68 (High Street and Market Street, Cinderford)	8.07 (Kempley)
Walking	39.00	68.16 (High Street and Market Street, Cinderford)	2.85 (Tidenham Chase)

Source: DfT Connectivity Mapping Report

Figure 70: DfT Connectivity – Forest of Dean



Source: DfT Connectivity Mapping Report

Within Stroud, access to workplaces has the lowest overall score (42.14/100) . The highest scores across the district are for shopping (52.98/100), as identified in Table 33. The scores overall reflect good connectivity to services for an area which is characterised by a mixture of larger settlements and rural areas, demonstrated in Figure 71.

Table 33: Connectivity Scores by Destination Type

Source: DfT Connectivity Mapping Report

Table 34: Connectivity Scores Summary

Source: DfT Connectivity Mapping Report

Percentage score

0 - 10	30 - 40	70 - 80
10 - 20	40 - 50	80 - 90
20 - 30	50 - 60	90 - 100

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 Created 20/06/22 12:00:00 (GMT) (GMT+01:00) 2022

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Within Tewkesbury, access to healthcare has the lowest overall score (47.25/100), as identified in Table 35. The highest connectivity score across the district is for shopping (56.37/100). The scores overall reflect good connectivity to services for an area characterised by a mixture of larger settlements and rural areas, demonstrated in Figure 72.

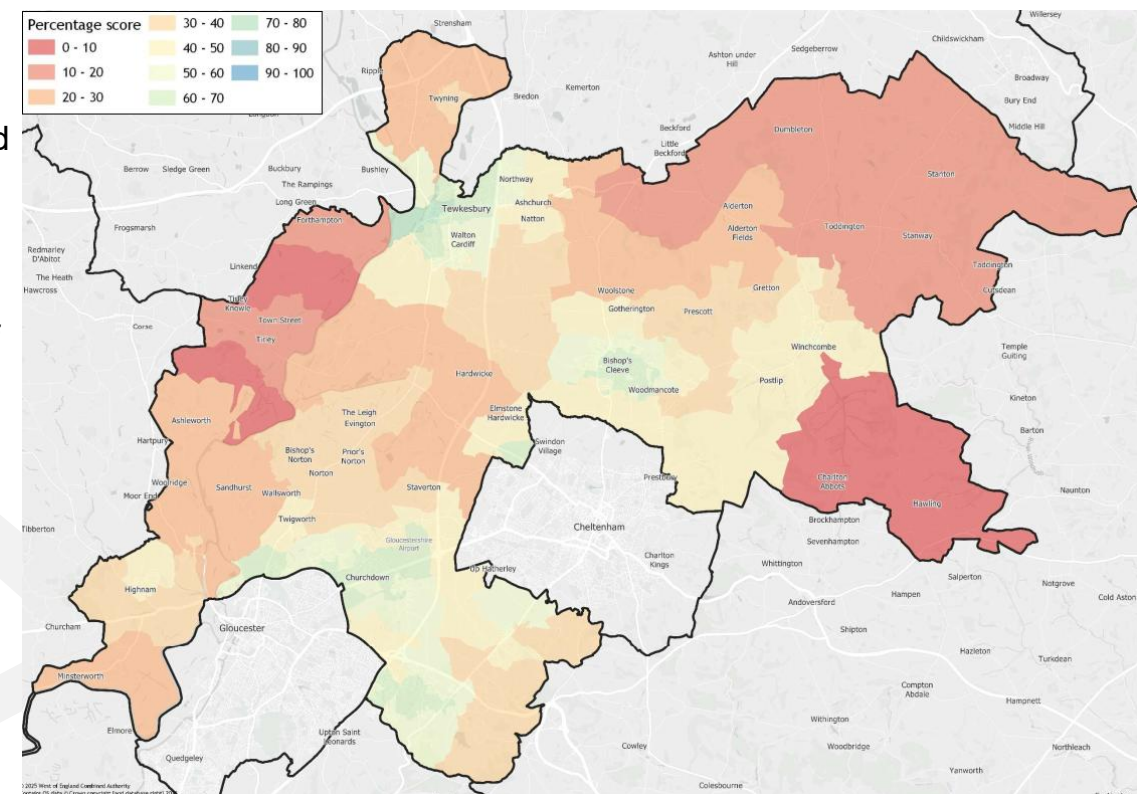
Walking has relatively low connectivity score of between 30-60 out of 100. Cycling has a higher connectivity score of between 50-70 out of 100 which reflects the presence of cycle infrastructure in the district. Public transport has a connectivity score of between 50-60 out of 100 which reflects the nature of the Tewkesbury as a market town. Driving has a high connectivity score overall.

	Overall (walking, cycling and public transport)	Cycling	Walking	Driving	Public Transport
Education	48.96	58.30	41.94	71.58	55.76
Leisure	50.33	59.35	45.71	78.94	52.97
Healthcare	47.25	54.69	39.54	76.42	52.45
Shopping (Retail)	56.37	66.22	52.34	84.06	58.83
Residential	55.64	63.91	56.61	82.47	52.36
Workplace (Employment)	49.10	56.62	40.63	75.01	50.04

Table 36 shows the highest connectivity is south of Tewkesbury town centre, across the majority of transport modes. The connectivity of cycling is highest at Swindon Village, on the edge of Cheltenham. In contrast, the rural areas around Hawling, close to Bourton-on-the-Water is the lowest in terms of connectivity, with the rural area of Chaceley also performing relatively poorly in terms of connectivity.

	Area weighted average across region	Max Score (Region)	Min Score (Region)
Overall DfT Connectivity Score	52.43	73.23 (Howells Road, Tewkesbury)	5.76 (Hawling)
Cycling	60.10	71.16 (Hayden Road, Swindon Village)	29.19 (Chaceley)
Driving	80.34	89.38 (Howells Road, Tewkesbury)	58.40 (Chaceley)
Public Transport	52.23	72.00 (Howells Road, Tewkesbury)	4.09 (Hawling)
Walking	48.32	75.17 (Howells Road, Tewkesbury)	3.00 (Hawling)

Figure 72: DfT Connectivity – Tewkesbury



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Road Safety

A recent study carried out by the Parliamentary Advisory Council on Transport Safety identified that Gloucestershire is no longer making significant reductions in the number of killed and seriously injured (KSI's) people from road traffic collisions. Gloucestershire has seen a 27% increase in the number of KSI's between the periods 2009-2011 and 2017-2019. GCC is aiming for a 65% reduction in the number of adults killed or seriously injured (KSI) and a 70% reduction for children by 2035, partly achieved through the phased rollout of community-backed 20mph speed limits.

KSI Causalities

Table 37 details the number of KSI casualties in Gloucestershire between 2015 and 2024 split by severity. The number of serious injuries presents an increase of 17% between 2015 and 2024. The number of casualties in 2024 reduced slightly from 2023 but is still relatively high.

Table 37: Number of reported KSI Causalities in Gloucestershire

Severity	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Killed	26	26	20	29	20	23	23	32	17	22
Serious	241	222	279	253	294	252	303	375	366	291
Total KSI	267	248	299	282	314	275	326	407	383	313

Source: Department for Transport – road safety statistics, RAS0403

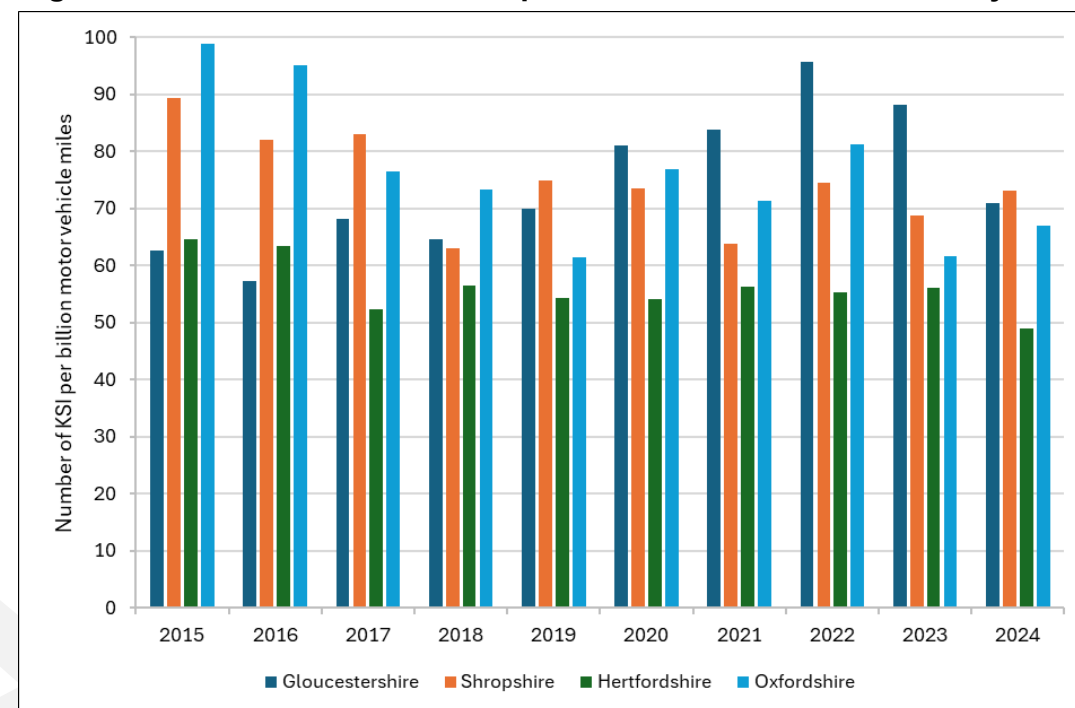
KSI Rate

As shown in Figure 73, Gloucestershire had a rate of 71 KSI casualties per billion motor vehicle miles in 2024, which reflects an overall increase from 63 in 2015. Notably, 2022 experienced a particularly high KSI rate of 96. Compared to similar local authorities, Gloucestershire's KSI rate between 2020 to 2024 has generally been higher than Hertfordshire.

Causalities by User Type

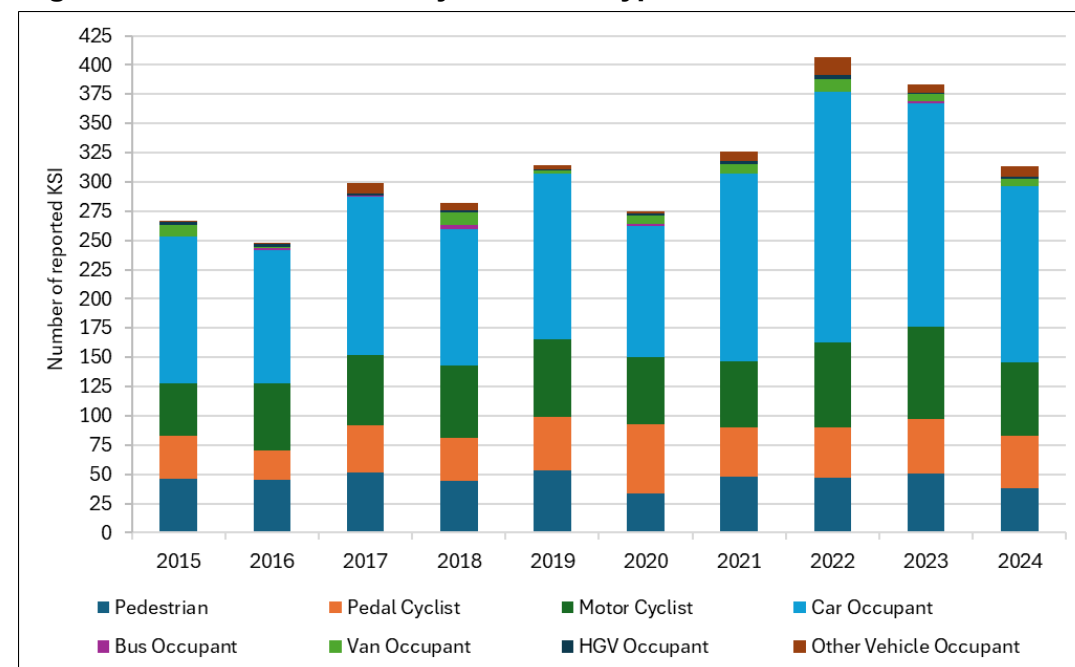
Figure 74 shows that car occupants consistently represent the largest proportion of KSI casualties in Gloucestershire, averaging around 40-50% between 2015 and 2024, and accounting for 48% in 2024. This is followed by motorcyclists, pedal cyclists, and pedestrians, each contributing 10–20% of KSI casualties.

Figure 73: Rate of road casualties per billion motor vehicle miles by LA



Source: Department for Transport – road safety statistics, RAS0403

Figure 74: Road casualties by road user type in Gloucestershire



Source: Department for Transport – road safety statistics, RAS0403

Security

A polling by YouGov released in March 2026 identified that almost nine in ten (88%) of women have felt unsafe whilst walking at night, whilst seven in 10 (71%) have changed their route to avoid walking in the dark during winter or darker months. Inadequate lighting, poorly maintained routes, personal safety fears and antisocial behaviour were identified as the key barriers to safety, with the majority of respondents saying they would feel safer walking in their neighbourhoods if these key issues were addressed.

As part of the LTP engagement, 27% of respondents raised concerns about their personal safety on public transport in Gloucestershire. This perception of safety is lower on buses with the 2021 BSIP satisfaction survey identifying that 33% of users had concerns about their personal safety on buses and 39% for their safety waiting at bus stops.

Understanding Gloucestershire's districts



Cheltenham

~118,800

Resident Population
(Census 2021)

2,613 people/km²

Population Density
(Census 2021)

46 km²

District Area
(Census 2021)

52,540

Households
(Census 2021)

Key characteristics

- Strategic links to Bristol, Birmingham, Oxford, London
- One railway station and a bus station
- Over 2,500 listed buildings
- Large employees such as UCAS, GE Aviation and Safran

Challenges

- High levels of deprivation in the district particularly in the wards of Hesters Way, Swindon Village, St Paul's and Oakley.
- Bus only accounts for 5% of travel to work trips which is relatively low compared to private car at 61% of residents.
- Frequent bus services in the peak hours but these are limited to a small proportion of corridors such as A40 and A417 between Gloucester and Cheltenham.
- 20% of households do not have access to a car, the highest in the county alongside Gloucester.
- Bus journey time reliability challenges on congested routes into the borough.

Opportunities:

- Strategic Interchange Hub Improvements at Cheltenham Racecourse and Cheltenham Spa Railway Station
- New P&R and strategic interchange at M5 J10
- M5 Junction 10 highway improvements
- Highway capacity improvements on the A435
- Bus priority and corridor improvements between Cheltenham-Gloucester along the B4063 and A40, Cheltenham-Andoversford, Cheltenham-Tewkesbury via Bishops Cleeve, Cheltenham-Cirencester, Cheltenham-Coombe Hill and Tuffley-Cheltenham
- Cycle access improvements linking Honeybourne Line to A40 and to Bishop's Cleeve, Swindon Village, North West Cheltenham Corridor
- Rail capacity enhancements at Cheltenham
- Corridor improvements along the A4019/A4013 and A46 Shurdington Road
- Cycle access improvements between Churchdown-Brockworth, Cheltenham-Bourton, Cheltenham-Andoversford, Cheltenham-Woodmancote and Tewkesbury-Cheltenham

Cotswold

~90,800

Resident Population
(Census 2021)

79 people/km²

Population Density
(Census 2021)

1,165 km²

District Area
(Census 2021)

40,597

Households
(Census 2021)

Key characteristics

- Rural and dispersed settlement pattern
- Links to Bath, Stroud, Cheltenham, Cirencester, Gloucester, Oxford
- Five railway stations
- Dominated by Cotswold National Landscape
- Large visitor economy

Challenges

- AQMA declared in Birdlip due to nitrogen dioxide exceeding safe levels.
- Only 1% of the population travelled to work by bus in 2021.
- Bus accessibility is limited and frequencies are often low (less than two services in the morning peak).
- Poor cycle links with infrastructure limited to town centres in the district.
- The A429 has a number of pinch points such as Unicorn Junction in Stow-on-the-Wold and the double mini-roundabouts and railway bridge in Moreton-in-Marsh.
- Lack of lay-bys and resting points for HGVs and for buses when stopping to pick up / drop off passengers on the A429.
- The traffic created by tourist movements within the Cotswold area has different characteristics than commuter traffic and affects the area during the weekends, holidays, and particularly during the summer months.

Opportunities:

- Strategic Interchange Hub enhancements at Kemble and Moreton-in-Marsh railway station
- Bus priority and corridor improvements between Andoversford-Moreton-in-Marsh, Andoversford-Oxfordshire, Cheltenham - Andoversford, Cheltenham-Cirencester, Cirencester-Kemble, Stroud-Cirencester and Cirencester-Wiltshire
- Moreton-in-Marsh rail capacity enhancements
- North Cotswold line rail capacity enhancements
- A417 Missing Link
- Junction improvements at the A429 Unicorn Junction, A44/A429 mini roundabouts, A433 London Road Tetbury and Tetbury town centre
- Highway improvements along the A429 corridor
- Walking and cycling improvements between Moreton-in-Marsh and Bourton on the Water, Cirencester-Kemble-Tetbury, Cirencester-Lechlade, Cirencester-Cricklade, Bourton – Kington, Bourton – Northleach, Chalford-Cirencester and Northleach-Cirencester

Forest of Dean

~87,000

Resident Population
(Census 2021)

171 people/km²

Population Density
(Census 2021)

526 km²

District Area
(Census 2021)

37,217

Households
(Census 2021)

Key characteristics

- Rural and dispersed settlement pattern
- Strategic links to Bristol, Gloucester and South Wales
- One railway station in Lydney
- Large area covered by ancient woodlands
- Variable topography

Challenges

- High levels of deprivation in the district particularly in the wards of Cinderford West 1 and Lydney East.
- Highest risk of TRSE out of all the districts at 38.9%.
- High obesity rate among children aged 10 to 11 at 23% which is higher than the overall average for Gloucestershire.
- River Severn creates severance and flooding challenges.
- Highest number of residents who drive to work (81%) in the county.
- Low levels of walking or cycling to work (9%).
- Lowest rail mode share (0.2%) among the districts with only one railway station in Lydney.
- Lydney railway station has poor accessibility and station facilities
- Cycling rate is 0.7% which is lowest in Gloucestershire.
- 12% of households do not have access to a car.
- One person households with residents over 66 years (38.8%) and lone parent households (16.8%) have the lowest car ownership.
- Highway connectivity is impacted by two key pinch points (A48 into Chepstow and A40 into Gloucester and Cheltenham).
- Overall connectivity scores are relatively low compared to other districts in the county particularly access to workplaces (32.21/100).
- Limited public transport access into Gloucester and Cheltenham.
- Off peak bus services are very limited.

Opportunities:

- Strategic interchange hub enhancements at Lydney Railway Station
- Strategic interchange hub at West of Severn
- Cinderford Northern Quarter Spine Road
- Bus priority and corridor improvements at Elton Road / A48 - Cinderford – Coleford, Elton Road / A48 - Lydney and Highnam - Elton Road / A48 and Coleford - Lydney
- Junction improvements at B4226/B4227 Bridge Junction, Bream Road
- A4136 Corridor highway improvements
- Newerne Link Road
- Walking and cycling improvements between Coleford-Lydney, Coleford-Cinderford, Newent-Highnam and Chepstow-Lydney

Gloucester

~132,500

Resident Population
(Census 2021)

3,418 people/km²

Population Density
(Census 2021)

40 km²

District Area
(Census 2021)

55,407

Households
(Census 2021)

Key characteristics

- Cathedral city
- Strategic links to Bristol, Gloucester and Birmingham
- One railway station
- Gloucester Transport Hub supports local and regional bus and coach services
- Base for large employers such as Gloucester Business Park, Gloucestershire Royal Hospital, Gloucestershire County Council

Challenges

- High levels of deprivation (10% most deprived) in the district particularly in the wards of Podesmead, Westgate, Coney Hill, Moreland, Barton and Tredworth, Martston, Robinswood and White.
- Gloucester has pockets of residents with very poor health which reflect the wards which are most deprived.
- Gloucester has a high obesity rate among children aged 10 to 11 at 22.5%.
- Second lowest number of residents who drive to work (69%) in the county.
- Second highest levels walking or cycling to work (12%) in the county.
- Low rail mode share of 0.4%.
- 20% of households do not have access to a car, the highest in the county alongside Cheltenham.
- Overall connectivity scores are relatively high compared to other districts in the county. Access to workplaces has the lowest overall score (59.36/100) and shopping has the highest (74.77/100).
- Bus journey time reliability challenges on congested routes into the city.

Opportunities:

- Strategic interchange hub enhancements at Gloucester Railway Station
- Bus priority and corridor improvements between Cheltenham-Gloucester, Gloucester-Hardwicke, Gloucester-Highnam, Gloucester City Centre and Gloucester-Coombe Hill
- M5 J12 capacity and safety improvements
- M5 J11a Upgrade
- New A40 Junction and Link Road to B4063
- C&G Roundabout Upgrade (Barnett Way Roundabout)
- Junction improvement at Priory Road, St Barnabas Roundabout, A40/A48 Highnam roundabout, A417-Brockworth Bypass / A46 Shurdington Road, Brockworth, A40/A417 Over Roundabout Improvement, A417 C&G roundabout, A38 / Down Hatherley Lane Corridor and A4019 / B4634 Old Gloucester Road / Gallagher Retail Park Junction
- Highway improvements at A38/A430/B4008 Cole Avenue Junction and A38 Outer Ring Road corridor
- Walking and cycling improvements between Tewkesbury-Gloucester, within city centre and at Estcourt Road roundabout

Stroud

~121,000

Resident Population
(Census 2021)

273 people/km²

Population Density
(Census 2021)

460 km²

District Area
(Census 2021)

52,428

Households
(Census 2021)

Key characteristics

- Market town
- Strategic links to Bristol, Gloucester, Cheltenham and Birmingham
- Steep topography
- Large proportion of district located within Cotswolds National landscape

Challenges

- Stroud is predicted to experience the highest growth in population between 2032 and 2047 to 150,522 people. Good quality transport infrastructure will be needed to support this population growth.
- High levels of deprivation in the district (10% most deprived) particularly in the wards of Dursley, Stonehouse and Stroud Slade.
- Second highest district at risk from TRSE at 26.6%,
- Pockets of poor health in Stroud.
- Bus service frequency during the evening and on Sundays is limited.

Opportunities:

- Strategic interchange hub enhancements at Stonehouse Railway Station and Stroud Railway Station
- P&R at Cam & Dursley Railway Station
- Strategic Interchange Hub and new station South of Gloucester
- Bus priority and corridor improvements between Stroud-Cirencester, Stroud-Gloucester, Stroud-Cirencester, Gloucester-Hardwicke, Hardwicke-Dursley-Stroud and Stroud-Nailsworth
- Cam & Dursley Railway Station enhancements
- Walking and cycling improvements between Gloucester-Stonehouse, Nailsworth-Charfield, Gunhouse Lane-Chalford, Box Road and A4135 to Chapel Street, Eastington and Nailsworth, Nailsworth-Tetbury, Stonehouse-Nailsworth, Stonehouse-Chalford, Stonehouse-Dursley, Stonehouse-Gunhouse Lane, Stonehouse-Saul Junction and Stroud-Nailsworth
- Cycle access improvements for Cam and Dursley Active Travel Route to Uley
- Access improvements for Stroud Town Centre
- Junction improvement at A4135/B4060, A429/A433, A38 / B4066, A419/A46, A419 / Dr Newton's Way, A38 / Alkington Lane, A46 / Bath Road and A4135 / B4066

Tewkesbury

~94,800

Resident Population
(Census 2021)

229 people/km²

Population Density
(Census 2021)

414 km²

District Area
(Census 2021)

40,931

Households
(Census 2021)

Key characteristics

- Market town
- Strategic links to Cheltenham, Cotswolds, Forest of Dean
- One railway station in Ashchurch

- Situated at the meeting point of the River Severn and River Avon

Challenges

- High levels of deprivation (10% most deprived) in the district particularly in Tewkesbury South ward.
- Tewkesbury has pockets of residents with very poor health.
- Low walking and cycling usage for trips to work at 9% compared to 78% usage for private vehicles.
- Bus service frequency during the evening and on Sundays is limited in the district.
- The frequency of rail service is poor when compared to the rest of the county.
- The M5/A46 creates severance for those living and travelling between Tewkesbury and Ashchurch.
- M5 Junction 9 and the A46 corridor suffer from congestion in peak hours and are recognised as a pinch points on the network.

Opportunities:

- Strategic Interchange Hub Enhancements at Ashchurch for Tewkesbury Railway Station
- Bus priority and corridor improvements between Cheltenham-Tewkesbury via Bishops Cleeve and Coombe Hill-Tewkesbury
- M5 Junction 9 improvements
- Replacement of existing A417 highway
- Junction Improvements at Alexandra Way / A46, Fiddington Lane / A46, Shannon Way / A438 traffic signal junction, Northway Lane / A46
- Walking and cycling improvements within Tewkesbury town centre and Bishop's Cleeve
- Walking and cycling improvements between Tewkesbury-Bishop's Cleeve, Ashchurch-Tewkesbury, Tewkesbury-Gloucester, Cheltenham-Tewkesbury via Bishop Cleeve, Bishop's Cleeve-Gotherington, Cheltenham-Woodmancote, Mitton-Tewkesbury, Newtown-Tewkesbury, Tewkesbury-Cheltenham
- Walking, cycling, bus and safety improvements at Estcourt Road Roundabout
- Ashchurch Freight Loop Extension and Third Platform