Stroud Town Centres & Retailing Study

Stroud District Council

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1. INTRODUCTION

Overview

1.1 This report has been prepared by GVA Grimley Ltd in response to an instruction by Stroud District Council dated September 2009, to prepare a Town Centres & Retailing Study for the Stroud administrative area. This study will provide essential background information to assist Stroud District Council in the production of a Local Development Framework (LDF).

1.2 National planning policy guidance requires that local planning authorities' policies and proposals in a LDF should be founded on a thorough, clear and up-to-date understanding of the needs of their area and the opportunities and constraints which operate within that area. Policy EC1 of PPS4: Planning for Sustainable Economic Growth (December 2009) requires that local planning authorities (LPAs) should prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market. At the local level, the evidence base should inter alia:

- assess the detailed need for land/floorspace for main town centre uses over the plan period;
- identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs
- assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed

Objectives of the Study

1.3 The need for an up-to-date study of town centre and retailing issues in Stroud District is timely given the progress made on the Regional Spatial Strategy for the South West, the need to inform Stroud District Council's preparation of its Local Development Framework (LDF) including the Core Strategy and also the current economic climate.

1.4 The key issues for this study, as identified in Stroud District Council's project brief (dated September 2009) are as follows:

- Assess current patterns of usage of the main town centres within the District, including their vitality and viability. This will take the form of a baseline survey of their current economies. The main town centres in Stroud District which are covered by this study are:

Stroud, Berkeley, Cam, Dursley, Minchinhampton, Nailsworth, Painswick, Stonehouse and Wotton-under-Edge.

- Assess the need for new floorspace for retail uses taking account of quantitative and qualitative considerations, including Local Plan allocations and Regional Spatial Strategy targets for housing in the District.
- Identify deficiencies in provision and assess the capacity of existing town centres to accommodate new development, including an analysis of retail space productivity growth and the types of retail and other units required in the larger centres, especially Stroud.
- Identify locations where retail, leisure and other main town centre uses should be focused and recommend strategies for developing and strengthening them.
- Identify the roles and functions of the commercial centres, appraise the boundaries defined in the Stroud District Local Plan and, where appropriate, define primary and secondary frontages within commercial centres.
- Appraise the appropriateness, or otherwise, of Local Plan Policies in the Town Centres and Retailing chapter, and recommend changes considered necessary in order to complement the outcomes of this Study and the provisions of PPS4.
- Review all Local Plan allocations and associated policies in the town centres, highlight any sites that do not comply with the provisions of PPS4, and recommend any changes considered to be necessary.
- Identify potential new allocations in the town centres, especially under-utilised sites, within the context of guidance set out in PPS4.
- Where appropriate, recommend planning policies aimed at managing the evening and night-time economy, taking account of guidance in PPS4.
- In the case of Stroud, assess the relationship between existing out-of-centre/ out-of-town developments and the town centre, and recommend any actions considered necessary to balance: (a) the town centre’s vitality and viability; and (b) the broader competitiveness of the town.

1.5 In order to address all of the above issues, Stroud District Council requires a comprehensive analysis of retailing in Stroud District that addresses both quantitative and qualitative issues. Accordingly, this study includes the following key components:

- Provision of a policy analysis, based on the contents of PPS4 plus policies at the regional and local level. At the local level, the Gloucestershire Structure Plan provides current strategic context for retailing in Stroud District, supplemented by policies set out in the Stroud District Local Plan. This study will facilitate a review of the robustness of shopping policies and proposals in the Local Plan, to inform the policy formulation in the LDF and other Council policy documents.

- Overview of the retail hierarchy in Stroud District, focusing on a review of the vitality and viability of the main town centres. The assessment examines the retail performance of each centre in line with the indicators of town centre health set out in PPS4.
- Detailed assessment of quantitative need based on existing and forecast population levels, forecast expenditure for specific classes of retail goods and forecast improvements in retail sales densities over the plan period. This is supplemented by a qualitative assessment of existing provision which examines the provision and distribution of existing facilities along with the trading performance of existing facilities
- Following the assessment of town centre health and future retail floorspace needs, this study also provides a review of potential shopping development opportunities in the main commercial centres. This work will examine existing allocations/opportunities identified in the adopted Local Plan, plus new potential opportunities which have been identified through the course of completing this study.
- Following the completion of each of the above tasks, a set of concise conclusions and a retail strategy for Stroud District is provided. This will focus on the retail hierarchy and the likely future role of each main centre, town centre improvements and retail development/investment/regeneration opportunities.

1.6 A key contributor to all of the above tasks has been two pieces of empirical research. The first is a household telephone survey, specifically commissioned by Stroud District Council and GVA Grimley for this retail study. The survey interviewed 1,000 people across a wide geographical area, based on postcode sector areas, within the Stroud administrative area plus adjoining local authority boundaries. A plan of the survey area is contained at Appendix A of this report. The survey, whose parameters are explained in greater detail in Section 5 of this report, has established the shopping habits of households for different types of food and non-food goods and has, in turn, contributed towards the detailed assessment of need for additional retail floorspace. The survey has also been structured to ascertain customer/visitor profiles, mode of travel to shopping destinations, plus a number of attitudinal questions determining what users think about the main commercial centres in the District and potential improvements to these centres. A full copy of the household survey tabulations is contained at Appendix B.

1.7 The second piece of research is an on-street survey of visitors in November 2009 has also been undertaken. In total, 600 face-to-face interviews were conducted in Stroud, Nailsworth, Dursley, Wotton, Berkeley and Stonehouse which sought to obtain information regarding purpose of visit, length of stay, attitude towards town centre facilities, suggested improvements and mode of travel (and parking location). The on-street survey has also contributed to the qualitative assessment of retail need and is a major contributor to the assessment of town centre health. A full copy of the on-street survey tabulations is contained at Appendix C.

Structure of the Report

1.8 The remainder of this report is structured as follows:

- **Section 2** of this report provides a review of current national planning policy guidance in PPS4, plus retail policies contained within Regional Planning Guidance for the South West (RPG10), the draft Regional Spatial Strategy for the South West and the Gloucestershire Structure Plan. This section also summarises the current local planning policy context outlined in the adopted Stroud District Local Plan.
- **Section 3** of this report analyses national retail trends. This includes a look back at recent historic trends, plus examination of likely future trends at the national level.
- **Section 4** provides an assessment of the retail hierarchy within Stroud District and the surrounding area, concentrating on the health of the main commercial centres in the District (Stroud, Berkeley, Cam, Dursley, Minchinhampton, Nailsworth, Painswick, Stonehouse and Wotton-under-Edge), monitoring the performance of relevant indicators as set out in national planning policy guidance. This section also provides an overview of out-of-centre retail provision within the District and retail provision in the sub-region.
- **Section 5** sets out an assessment of future need for additional retail floorspace provision in Stroud District over the lifetime of the Local Development Framework (up to 2026). It examines both quantitative and qualitative considerations of retail need.
- Drawing upon the findings of preceding chapters, **Section 6** outlines the broad policy options for retailing in the main commercial centres, examining future trends for floorspace capacity and an assessment of potential town centre development sites.
- **Section 7** provides a summary of the main findings of the study and provides an outline of the retail strategy for Stroud District.

1.9 All plans, statistical tables and other documents referred to in the text of this study are contained in appendices at the rear of this document.

2. PLANNING POLICY CONTEXT

Overview

2.1 This chapter outlines the salient planning policy context for retailing and town centres at the national, regional, strategic and local level. In particular, it outlines national planning policy in Planning Policy Statement 4: Planning for Sustainable Economic Growth which was published in December 2009 and replaces PPS6 (2005). At the regional level, we summarise the contents of Regional Planning Policy Guidance for the South West (RPG10). We also summarise the contents of the draft Regional Spatial Strategy for the South West, although it should be noted that immediately prior to finalising this report the new Coalition Government announced plans to abolish all Regional Spatial Strategy documents. The retailing and town centres policies in the Gloucestershire Structure Plan are also summarised, along with a review of the policies and allocations within the town centres and retailing chapter of the adopted Stroud District Local Plan.

National Retail Planning Policy

2.2 In December 2009 the Department for Communities and Local Government published Planning Policy Statement 4: Planning for Sustainable Economic Growth. This document replaces, amongst other things, Planning Policy Statement 6: Planning for Town Centres (2005) and sets out national planning policies for economic development, including main town centre uses. The introductory section of PPS4 notes that the plan-making policies in this document should be taken into account by local planning authorities in the preparation of local development documents and are also a material consideration which must be taken into account in development management decisions.

2.3 The document notes that the overarching objective of central government is for sustainable economic growth and, to help achieve this, the government's objectives for planning are to:

- Building prosperous communities by improving the economic performance of the cities, towns, regions, sub-regions and local areas, both urban and rural.
- To reduce the gap in economic growth rates between regions, promoting regeneration and tackling deprivation.
- Deliver more sustainable patterns of developments to reduce the need to travel, especially by car and respond to climate change.

- Promote the vitality and viability of town and other centres as important places for communities. To do this the government wants:
- New economic growth and development of main town centre uses to be focused in existing centres with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities.
- Competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).
- The historic archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and focus for the community and for civic activity.

2.4 Policy EC1 of PPS4 deals with using evidence to plan positively. EC1.3 notes that, at the local level, the evidence base should:

- Be informed by regional assessments.
- Assess the detailed need for land or floorspace for economic developments, including for all main town centre uses over the Plan period.
- Identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs.
- Assess the existing and future supply of land for economic development, ensuring that existing site allocations for economic development are re-assessed against the policies in PPS4.
- Assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

2.5 When assessing the need for retail and leisure development, local planning authorities should:

- Take account of both the quantitative and qualitative need for additional floorspace for different types of retail and leisure developments.
- In deprived areas which lack access to a range of services and facilities give additional weight to meeting these qualitative deficiencies. However any benefits in respect of

regeneration and employment should not be taken into account, although they may be material considerations in the site selection process.

- When assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold (within the broad categories of comparison and convenience goods), forecast improvements in retail sales density.
- When assessing qualitative need for retail uses:
  - Assess whether there is provision and distribution of shopping, leisure and local services which allow genuine choice to meet the needs of the whole community, particularly those living in deprived areas, in light of the objective to promote the vitality and viability of town centres and the application of the sequential approach.
  - Take into account the degree to which shops may be over-trading and whether there is a need to increase competition and retail mix.

2.6 Policy EC3 deals with planning for centres and notes that regional planning bodies and local planning authorities should:

- Set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high density development accessible by public transport, walking and cycling.
- Define a network (a pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes to meet the needs of their catchments, having:
- Made choices about which centres will accommodate any identified need for growth in town centre uses, considering expansion where necessary, taking into account the need to avoid an over-concentration of growth in centres. Identifying deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy or designating new centres where necessary, giving priority to deprived areas which are experiencing significant levels of multiple deprivations where there is a need for better access to services, facilities and employment by socially excluded groups.
- Ensure any extensions to centres are carefully integrated with the existing centre in terms of design including the need to allow easy pedestrian access.
- Where existing centres are in decline, consider the scope for consolidating and strengthening the centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment.

- Where reversing decline in existing centres is not possible, consider re-classifying the centre at a lower level within the hierarchy of centres reflecting this revised status in the policies applied to the area. This may include allowing retail units to change to other uses whilst aiming, wherever possible, to attain opportunities for vital local services.
- Ensure that the need for any new expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.
- At the local level, define the extent of the centre and the primary shopping area in their adopted proposals map, having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations.
- At the local level, consider setting floorspace thresholds with a scale of edge-of-centre and out-of-centre developments which should be subject to an impact assessment under Policy EC16.1 and specify the geographic areas these thresholds will apply to.
- Identify any locally important impacts on centres which should be tested under Policy EC16.1.F.
- At the local level, encourage residential or office development above ground floor retail leisure or other facilities within centres, ensuring that housing in out-of-centre mixed use developments is not in itself used as a reason to justify additional floorspace for main town centre uses in such locations.
- At the local level, identify sites or buildings within existing centres suitable for development, conversion or change of use.
- At the local level, use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres.

2.7 Policy EC4 of PPS4 asks that local planning authorities should proactively plan to promote competitive town centre environments and provide consumer choice by:

- Supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre.
- Planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre.

- Supporting shops, services and other important small-scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages.
- Identifying sites in the centre or, failing that, on the edge of the centre capable of accommodating larger format developments where a need for such developments has been identified.
- Retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement.
- Taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

2.8 Policy EC4 also includes reference to the evening and night-time economy in town centres and advises that local planning authorities should:

- Encourage a diverse range of complementary evening and night-time uses which appeal to a wide range of age and social groups, making provision where appropriate, for leisure, cultural and tourism activities.
- Identify the number and scale of leisure developments taking into account their potential impact on the character and function of the centre, including that of anti-social behaviour and crime.

2.9 Policy EC5 advises that local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. Further information on Policy EC5, including the application of the sequential approach when selecting sites for town centre uses and assessing the impact of proposed locations can be found in Section 5 later in this report.

2.10 Policies EC14 to EC17 provide guidance on development management associated with applications for main town centre uses including retail development. Policy EC14 notes that a sequential assessment is required for planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up to date development plan. In addition, an assessment addressing the impacts of a particular development is required for planning applications for retail uses which are not in an existing centre and not in accordance with an up-to-date development plan. In advance of development plans being revised to reflect PPS4, an assessment of impacts is necessary for planning applications for retail development below 2,500 sq m as well as the compulsory requirement for developments over 2,500 sq m. An impact assessment is also required for planning applications in an existing centre which are not in accordance with the development plan and which would substantially increase the attraction of the centre to an extent that the development could have an impact upon other centres. Policies EC15 and EC16 outline detailed guidance in relation to the assessment of impact and the consideration of sequential assessments, whilst Policy EC17 provides clear guidance to local planning authorities in their consideration of planning applications for development of a main town centre use which is not in a centre and not in accordance with an up-to-date development plan. Policy EC17.1 notes that such applications should be refused planning permission where:

- The applicant has not demonstrated compliance with the requirements of the sequential approach (Policy EC15); or
- There is clear evidence that the proposal is likely to lead to significant adverse impacts in terms of any one of the impacts set out in Policies EC10.2 and EC16.1, taking account of the likely cumulative effect of recent permissions, developments under construction and completed developments.

2.11 Where no significant adverse impacts have been identified under Policies EC10.2 and EC16.1, Policy EC17 notes that planning applications should be determined by taking account of:

- The positive and negative impacts of the proposal in terms of Policies EC10.2 and EC16.1 and any other material considerations; and
- The likely cumulative effect of recent permissions, developments under construction and completed developments.

Regional Planning Guidance for the South West (RPG10 and RSS)

2.12 Guidance at the regional level, contained within RPG10 (adopted September 2001), pre dates the publication of PPS4 (and former PPS6). Nevertheless, RPG10 is a component of the Development Plan that directs local planning authorities, in formulating their planning policies and proposals, to consider the following areas:

- Seek to locate uses which attract large numbers of people in the centres of the Principal Urban Areas (PUAs) and in the other designated centres for growth specified in the spatial strategy.
- Encourage town centre developments of an appropriate scale in the market towns and larger settlements elsewhere in the region in keeping with their size and function and which

can help to reduce the need to travel and encourage journeys by modes other than the private car.

- Ensure the vitality and viability of existing centres is maintained, by assessing the need for new development and by applying the sequential test. For convenience provision, RPG10 advises that a distribution of provision should be maintained, that minimises the lengths and frequency of trips.

2.13 The review of RPG10, in the form of the Regional Spatial Strategy (RSS) was, at April 2010, well advanced. The draft RSS was published in June 2006 and consultations closed in August 2006. The Examination in Public closed in July 2007 and the EiP Panel report was finalised in December 2007 and made publicly available in January 2008. The Secretary of State's Proposed Modifications were published for consultation in July 2008. However, due to legal challenges to other regional planning strategy documents elsewhere in England, further work was being undertaken on the draft RSS and a date for final adoption had not been set. However, following the general election in May 2010, the new Coalition Government has signalled its intention to abolish Regional Spatial Strategy documents and therefore the draft South West RSS will make no further progress towards adoption However, for completeness, a summary of the salient parts of the latest version of the draft RSS is outlined below.

2.14 The latest version of the draft RSS (including Proposed Modifications) currently requires the provision of 9,100 dwellings in Stroud District between 2006-2026. This level of additional dwellings is set out in Policy HMA3, which deals with the Gloucester and Cheltenham Housing Market Area. HMA3 notes that of 9,100 dwellings required for Stroud District, 3,500 should be provided as part of urban extensions to the south of the Gloucester urban area including 2,000 units within Area of Search 3A and 1,500 units within Area of Search 3B. Planning permission has already been granted for 1,750 units within the Hunts Grove mixed use development which falls within Area of Search 3A. Excluding the dwellings required as part of urban extensions to the south of Gloucester, 5,600 dwellings are required for the remainder of Stroud District up to 2026.

2.15 Policy TC1 of the draft RSS (as amended by the Secretary of State's Proposed Modifications) deals with city and town centres and encourages local authorities and other agencies to work together to ensure that the vitality and viability of the region's existing network of towns and city centres is maintained and enhanced. In doing so, it will be important to ensure that such centres are not adversely affected by inappropriate development elsewhere, and that provision is made for a mix of uses within town centres, including retail, cultural facilities, offices, other employment and housing. Policy TC1 advises that, the central areas of the Strategically Significant Cities & Towns (SSCTs) will be the main focus for new investment in retail and other major facilities requiring high levels of accessibility to the communities they serve. Stroud District does not contain any SSCTs, the nearest being Gloucester, Cheltenham and Bristol.

2.16 Within settlements identified in the context of Development Policy B the range of and quality of central area facilities will also be maintained and enhanced to meet future needs. These settlements will include Stroud and, (subject to the decisions made in formulating the Council's Core Strategy), possibly some of the other main towns in the District e.g. Dursley/Cam, Nailsworth and Stonehouse. In all settlements, measures should be introduced to improve accessibility by sustainable modes, and to enhance the public realm and quality of the town centre environment. In doing so, local authorities and other agencies should recognise the role of central area investment in supporting regeneration objectives. Policy TC1 requires that the scale of new investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth.

2.17 Policy TC2 of the draft RSS has been introduced by the Secretary of State's Proposed Modifications and notes that outside of the strategic centres the planning of new centres to serve proposed new development areas should reflect the need to complement rather than compete with the retail facilities in the relevant strategic centre.

Adopted Gloucestershire Structure Plan 1991 - 2011

2.18 The current version of the Structure Plan is the Second Review which was adopted in November 1999 and therefore significantly pre-dates PPS4 and the current Regional Guidance RPG10. Following the adoption of the Second Review, the Structure Plan Third Alteration was progressed to an advanced stage but was not adopted. However, it is still a material consideration in planning decisions throughout the County. A review of the retail policies in the Second Alteration of the Structure Plan is given below.

2.19 Policy TC.1 establishes the retail hierarchy within Gloucestershire, with Stroud and Dursley falling within the second tier below the principal centres of Gloucester and Cheltenham. The remaining main settlements in the District will fall within the fourth and fifth tiers comprising 'other centres in principal settlements and local centres'.

2.20 Policy TC.2 relates to developments which are likely to generate a significant number of trips, and advises that such developments should be located within town centres. The Policy notes that where there is a demonstrable need for such development and where suitable options for such uses are not available in town centres, preference will be for edge-of-centre locations followed by district and local centres and only then out-of-centre sites in locations which are easily accessible by a choice of means of transport.

2.21 Policy TC.3 relates to Local and Village Centres, the policy requires that provision should be made for the retention and improvement of local shopping facilities and services, especially in rural areas. Such development should be of a scale consistent with the function and character of the local centre.

2.22 Within the draft Third Alteration of the Gloucestershire Structure Plan, Stroud and Stonehouse are identified as 'Other Designated Centres for Growth' under Policy SD.3. The policy notes that the level of growth in these centres should relate to the role and function of these centres. The remaining main commercial centres in Stroud covered by this study will fall into Policies SD.4 & SD.5 which deal with market towns and other rural settlements.

Stroud District Local Plan

2.23 The Stroud District Local Plan was adopted in November 2005, with the initial stages of its preparation (up to and including the Local Plan Inquiry) taking into account guidance within PPG6 (and subsequent Ministerial Statements on retailing and town centre policy) although after the receipt of the Local Plan Inspector's Report the Plan was amended to take into account PPS6 (2005). The Secretary of State issued a Direction on the 13th October 2008 identifying policies within the Local Plan which then expired on the 9th November 2008. All remaining policies were extended and those relevant to retail development are duly considered below.

2.24 Chapter 6 sets out the Local Plan's policies towards town centres and retailing and provides self-contained sections on the need for new retail development across the District, plus Stroud and Dursley town centres. The Plan highlights Stroud as the focus for comparison goods retailing and a number of sites are identified to accommodate potential needs. Dursley is the one centre which is identified as in need of further large scale convenience retail provision and a site at Castle Street is identified to accommodate this need. Beyond these two centres, the Local Plan notes that the only retailers likely to be attracted to other centres are independent retailers and sufficient vacancies exist to satisfy any demand of this kind during the Plan period.

2.25 Later in this report, a review of the policies in Chapter 6 of the Local Plan is undertaken, in the context of the findings of this study and recently published PPS4. However, in summary, policies within Chapter 6 of the Local Plan include:

- SH1 – change of use from Class A1 Retail to non-Class A1 uses in primary shopping frontage areas in Stroud town centre.

- SH2 – changes of use from Class A1 Retail to non-Class A1 uses in secondary shopping frontage areas in Stroud town centre.
- SH4 – development within Stroud town centre
- SH6 – allocation of land at Cheapside Wharf for mixed use development
- SH9/10 – changes of use within the defined town centres of Dursley, Wotton, Stonehouse, Nailsworth, Berkeley, Painswick and Minchinhampton
- SH14 – proposals for change of use within Cam District Centre or local shopping centres
- SH15 – loss of individual/village shops, public houses and other community facilities
- SH16 – new garden centre development

3. RETAIL AND LEISURE TRENDS

Introduction

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in Stroud District. A number of trends are likely to have a bearing on the future pattern of retail provision in Stroud District, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to Stroud District drawing from a range of published data sources, including research by Verdict Analysis and Mintel.

Demographics

3.2 Over the last 15 years UK population has increased at a rate of approximately 0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 in 2006, with smaller families, more divorces, people living longer etc. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.

3.3 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8%. Older shoppers have a younger mindset than in the past, are more fashion aware and, in recent years, financially better off as a result of general house price growth as well as income growth. However, post retirement income from pensions could be a concern if they do not achieve anticipated values. They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.

3.4 Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

Income & Expenditure

3.5 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and has been even stronger over the last 10 years (at 8%). However, recent circumstances have reversed this pattern of growth.

3.6 The extremely rapid deterioration in the economic performance during the final months of 2008 is having far-reaching implications for available income and consequently expenditure. The UK economy has contracted by a substantial 5.7% in real terms since this recession began in mid-2008. The weakness has been broad-based, with exports hit by the global downturn and domestic demand constrained by rising unemployment and weak confidence in the economy. The decline has been exaggerated by a record reduction in the value of share prices. The manufacturing sector has been hardest hit, reflecting the slump in global demand. Construction remains depressed by a sharp fall in housing starts and the cancellation of many projects. The key services sector has also contracted, but at a gentler pace.

3.7 Household spending fell in real terms by 3.2% in the four quarters to 2009q1. The pace of decline accelerated from -0.4% in 2008q2 to -1.3% in 2009q1 as higher unemployment and slow growth in earnings hit spending. Experian estimate that spending fell a further 1% in the second quarter, taking the decline since the recession began to 4.2%.

3.8 Consumer expenditure on retail goods has been more resilient than total spending. The latest official retail sales data show spending in volume terms up 1.3% in the three months to June 2009. Experian believe this divergence between total consumer spending and retail expenditure reflects three major factors:

- consumers have cut back on big ticket items such as expensive holidays, household goods and cars, but continue to spend on other items;
- huge discounting has kept volumes up;
- there has been a transfer of spending from services (hospitality, personal care and entertainment) to retail spending on items enabling these activities to be carried on in the home;

3.9 The cost to retailers' margins from discounting and the transfer of spending from service providers in the high street has been a factor underlying the substantial rise from 7% to 11.5% over the past year in the number of vacant shops, according to Experian data. Some of the largest failures have been in the bulky goods sector, which has suffered from the downturn in the housing market. Lack of available cash as a result of the credit crunch has also played a key role.

3.10 The recession has been severe, but is entering a milder phase. Surveys of businesses indicate that confidence has improved, as indicated by surveys of purchasing managers. Recent evidence from the mortgage market also suggests that the ferocity of the downturn may be abating. However it is too early to confirm whether this improvement will be sustained while unemployment is rising and lending remains constrained.

3.11 Experian expect further albeit modest declines in Gross Domestic Product (GDP) in the next few months, with the economy stabilising around the turn of the year, stemming from an end to heavy destocking; a reduction in the rate of decline in house prices; a more marked revival of lending to businesses and a modest pick-up in export demand.

3.12 The upturn when it develops in 2010 will be gradual and patchy as investment and household spending remain weak and the global economy revives only slowly. In year-on-year terms, the implication is that consumer spending will shrink by 3.5% this year and contract by a further 0.6% in 2010.

Medium-Term Outlook

3.13 The medium-term outlook (next 5-10 years) is for much slower growth than was seen during the past 10-15 years. Experian expect GDP growth to average 2.0% a year in 2011-16 and consumer spending to average 2.2%. These rates compare with an annual average of near 3% in 1995-2007 for GDP and 3.2% for consumer spending.

3.14 The key reasons for this marked deceleration are:

- Government finances have deteriorated sharply. A result of the recession has seen a fall in tax receipts and a rise in benefit payments. Bank bail-outs have exacerbated the fiscal deficit. Finances will remain under pressure even when the economy recovers, as an increasing number of people move into retirement, raising public expenditure and reducing tax and National Insurance receipts. It is estimated that the government will have to find £40bn a year in the medium term through spending constraints and higher taxes. This will weigh down on consumer spending.
- The sharp reduction in investment (down 13% in the year to 2009q1) and cancellation or postponement of plans will inevitably depress medium-term growth prospects in many parts of the UK economy.
- There will be no boost in spending on the scale of what was seen in the past decade from the availability of consumer credit (e.g. credit cards, loans etc). The banking sector will be more cautious and households' appetite for taking on credit will be less voracious as they seek to control their debts which are at historically high levels in relation to incomes.

Moreover, savings are likely to be higher than in the past decade as job insecurity continues against a backdrop of high unemployment and weak growth.

- The main engines of growth in the past decade – financial and business services and the housing market - will be less buoyant. London's financial services sector will be more tightly regulated and under pressure from centres in the Middle and Far East; a more subdued housing market will curb lending and real estate transactions; and the now mature business services sector will not be able to repeat its 7.9% annual rate of expansion of 1995-2007.
- Public spending - a key creator of jobs in the past decade – will be severely constrained. This will prevent unemployment falling as rapidly as in the aftermath of the recession of the early 1990s.

Long-Term Outlook (10+ Years)

3.15 While the economy may return to a stronger growth path in the second half of the next decade, Experian do not believe that the exceptional performance of the period 1995-2007 will be repeated as some of the issues constraining the medium-term outlook remain unresolved. Environmental factors including much higher energy costs will also constrain growth. Experian forecast GDP growth between 2016 and 2026 to average 2.4% a year.

3.16 Non-store retail sales, excluding internet sales, are expected to decline over the next ten years, but this will be more than offset by the growth of internet sales, resulting in overall growth in non-store sales in absolute and percentage terms. Total non-store convenience retail sales (including internet sales) are expected to increase from 2.5% of sales in 2006 to 4.8% in 2013, rising to 6% in 2026, whilst total sales for goods not bought on the high street are expected to increase from 6.8% in 2006 to around 9.1% in 2013, before stabilising.

3.17 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco and Sainsbury's in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements. However, Tesco has recently announced that it is to trial 'dark stores' which have no customer access and are simply used for picking internet deliveries. Such premises could be large-scale retail warehouses which don't need to be located in town centres and therefore could have a future impact upon employment land predictions.

3.18 According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores.

Sales Efficiency

3.19 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the volume of sales from existing physical retail floorspace. This is commonly known as sales ‘efficiency’ (or ‘productivity’) and, in other words, is an allowance for the growth in volume of sales from existing stores. Such an allowance also helps maintain the vitality and viability of town centre businesses.

3.20 This growth represents the ability of retailers to increase their productivity (i.e. more sales from the same amount of floorspace) and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities (i.e. the amount of money which is attracted by retail sales areas – for example a store with a 1,000sq m sales area and a turnover of £1million will have an average sales density of £1,000 per square metre). The application of a turnover ‘efficiency’ growth rate is a standard approach used in retail planning studies.

3.21 Although hard quantitative evidence is limited, shops selling non-food goods (such as clothes and electrical equipment) in particular have, over time, increased sales densities (i.e. sales in £ per square metre) by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace.

3.22 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, this has led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future than over the last 10 years, sales density growth is likely to be towards the bottom end of the range. Therefore, we are now incorporating a 1.3% efficiency rate for comparison retailing up to 2016 and 2% pa thereafter and a 0.1% efficiency rate for convenience retailing up to 2016 and 0.5% pa thereafter.

Employment

3.23 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase.

3.24 Over the next 15 years Experian Business Strategies expect a marginal increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions.

Location

3.25 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) but only 2% of these had more than one car. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%.

3.26 Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends are likely to continue to influence shopping patterns but the rate of change may well diminish, particularly in light of the economic slow-down. It would seem likely, however, that levels of mobility will be retained although frequency of travel may decline as the number of cars per household may fall in the economic downturn. The growth in car mobility evidently puts pressure on parking provision in town centres and can lead to congestion with potentially knock-on detrimental impacts for town centres.

3.27 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply.

3.28 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

3.29 PPS4 reinforces town centre first objectives, whilst the sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers' business models are also relevant.

Size of Units

3.30 The growth of national multiple traders (i.e. those businesses who have more than one outlet) and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre developments that have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

3.31 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last 10 years, as space is concentrated into a smaller number of larger stores.

3.32 Whilst the number of superstores (>25,000 sq ft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

3.33 A by-product of the restriction of new development of large foodstores is the growth in planning applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, non-food floorspace in the larger format stores of the top 4 grocers now accounts for between 28% (Morrisons) and 50% (Asda) of sales floorspace.

Shopping & Leisure

3.34 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy ‘needs’, they increasingly shop to satisfy ‘wants’ as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.

3.35 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplex cinemas (i.e. cinemas with several screens) in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

3.36 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is ‘daytime trade’ and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-Tailing

3.37 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.

3.38 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by approximately 50% between 2007 and 2012.

3.39 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, clothing & footwear is the UK's third largest online market.

3.40 Books are one of the online market's most mature sectors – having been present in the online arena for over a decade. The category was brought to prominence by Amazon back in 1995, culminating today in approximately £1 in every £7 spent on the category going through online. In 2007, the online book market grew by 15% to £504m, although this was the lowest growth for four years indicative of the approaching maturity of the market. The effects of on-line book sales on high street retailers were felt in late 2009 with the fall of Borders UK into administration. A number of potential developments regarding books are on the horizon which have the potential to alter the dynamics of the sector, notably the digitisation of books. The immediate impact of this development in the short term is limited, although it should give traditional book retailers 'food for thought' regarding the creation of their long term strategies.

3.41 Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from £0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.

3.42 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with national policy, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, for Stroud District Council the current economic slow down will have an impact on the retail sector and growth forecasts will need to reflect recent publications from Experian Business Strategies.
- Heightened mobility through increased car ownership, alongside growth in affluence, has favoured larger centres over smaller centres. Shoppers are more willing to travel further to higher order centres which have increased in size and importance relative to smaller centres, leading to a consequent fall in their market share.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such requirements and are able to accommodate this demand. This is particular noticeable in the convenience sector, which has seen a 37% increase in food superstores, but a 31% fall in total number of convenience stores over the last 10 years. This has led to current concerns in respect of lack of competition and market dominance.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure – although this may change in the coming months. Nevertheless, the mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.
- As competition from the internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been

unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.

4. TOWN CENTRE HEALTH CHECKS

Introduction

4.1 The purpose of this section is to provide an assessment of the current state of retailing within Stroud District and its relationship to surrounding areas. This will be carried out through compiling health checks of the town centres identified by Stroud District Council, plus an overview of out-of-centre provision. Part 4 of the Practice Guidance on Need, Impact and the Sequential Approach in PPS4 refers to the development of town centre strategies. Such strategies need to be based on sound evidence which should include an audit of existing centres, to identify their current role, their vitality and viability, and their potential to accommodate new development and/or change having regard to identified needs. Town centre health checks provide the opportunity to consider a centre's performance over time, in relation to national trends and to similar sized centres elsewhere. For the purposes of reviewing the health of town centres within Stroud, this study will draw comparisons between each of the nine centres and also to national trends. Annex D of PPS4 identifies the indicators used for assessing the health of town centres.

4.2 Measurement of vitality and viability of town centre health is achieved through a basket of tried and tested indicators. The information gathered for town centres is useful not only to inform the review of allocations and policies, but is also useful for assessing the likely impact of retail development proposals. In line with the project brief issued by Stroud District Council, the health of the main centres in the District (Stroud, Stonehouse, Nailsworth, Painswick, Dursley, Cam, Berkeley, Wotton-under-Edge and Minchinhampton) has been assessed. The indicators which have been reviewed for each of the centres are:

- diversity of main town centre uses (by number type and amount of floorspace);
- the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- the potential capacity for growth or change of centres in network;
- retailer representation and intentions to change representation;
- shopping rents;
- proportion of vacant street level property;
- commercial yields on non-domestic property;

- pedestrian flows (footfall);
- accessibility;
- customer and residents' views and behaviour;
- perception of safety and crime; and
- state of the town centre environment quality.

4.3 It should be noted that due to the size and function of some of the centres, it is not possible to gather information on a number of the indictors, particularly retail rents and commercial yields.

4.4 Information on the indictors of town centre health listed above has been gathered from a number of sources, including Stroud District Council, Experian Business Strategies and the Valuation Office. This information has been supplemented by surveys undertaken by GVA Grimley during October/November 2009. In addition, a review of retailer requirements for representation in the main centres has also been undertaken. This sought to identify retailer interest in the main Stroud town centres. The survey has identified that the focus for retailer interest (from national multiple operators) is for Stroud and no specific interest was identified for the other main settlements in the district.

4.5 Throughout this section and the remainder of the report, reference is made to convenience and comparison goods retail floorspace/facilities. These can be defined as:

- Convenience goods: low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90 per cent of non-durable household goods[1].
- Comparison goods: all other retail goods including clothes, shoes, furniture, floorcoverings, textiles, electrical goods (including domestic appliances), personal and luxury goods (e.g. jewellery, perfume, cosmetics etc), recreational goods (e.g. sports goods, bikes, toys etc) and 10 per centre of non-durable household goods.

The Sub-Regional Retail Hierarchy

The Existing Position

4.6 Stroud District is located in the county of Gloucestershire and is part of the South West region. It is bordered by Gloucester City to the north, Cotswold District to the east, South

[1] Non-durable household goods comprise cleaning materials, kitchen disposables, household hardware and appliances, kitchen gloves, cloths etc and pins, needles, tape measures and nuts and bolts

Gloucestershire to the south and the Severn Estuary bounding the district to the west. The district covers an area of approximately 45,325 hectares and is situated approximately 20 miles north of Bristol and lies immediately south of Gloucester and Cheltenham. The main town of Stroud acts as the focal point for the district.

4.7 Table A below shows the level of total and Class A1 retail floorspace in the main settlements in Stroud, when compared with retail floorspace within the major settlements in surrounding administrative areas. The table below also provides a VenueScore ranking for each centre for 2007 and 2009. The VenueScore database ranks individual based on a ‘basket’ of retailer representation and floorspace information, to enable a comparison to be drawn between the performance of different centres and over time.

Table A: Sub-Regional Shopping Hierarchy Source: Experian & VenueScore

Tier/Centre	Total Class A Retail Floorspace (sq m)	VenueScore Ranking 2007 (out of a total of 6449 centres)	VenueScore Ranking 2009 (out of a total of 6028 centres)
Stroud	39,298	414	443
Dursley	8,863	1231	1330
Nailsworth		1947	1870
Gloucester	117,723	84	86
Cheltenham	140,442	20	27
Cirencester	45,903	232	257
Tewkesbury	26,765	543	562
Thornbury	15,236	858	878
Yate	29,878	366	376
Bristol (Cribbs Causeway)		73	82
Bristol (Centre)	132,164	27	12

Stroud Town Centre

Structure of the Town Centre

4.8 Stroud is the main centre within the District, centrally located and accommodating a range of services, including administrative functions, which serves the wider population. Stroud is accessible given its largely rural location, with access by private car from Junction 13 of the M5 and is also situated on the London – Cheltenham Spa railway line. Other major routes into the town include the A419 (Cirencester to J13 link) and the A46 (connects Bristol and Bath to the south and Gloucester to the north). Whilst acting as a focal point for the central towns and villages within the District, there is a recognised loss of retail expenditure with towns and villages on the periphery of the district also served by larger centres such as Cheltenham, Gloucester, Cirencester and Bristol.

4.9 The town is particularly noted for its industrial heritage, with historic mills still in existence within the town. Stroud is also a popular tourist destination due to its setting within the Stroud Valleys and access to the Cotswold Way. The town is bound by the Cotswold Area of Outstanding Natural Beauty to the north, east and south.

4.10 Due to the industrial importance of the town in the nineteenth century, a canal system was built which led to the development of the Stroudwater Navigation and the Thames and Severn Canal. However, after the development of the railway, this transport link was no longer required and the Thames and Severn Canal was subsequently closed in 1933. The Cotswold

Canals Partnership is undertaking the restoration of the Canals in Stroud and is looking to re-open the link between the Severn and the Thames. This has significant potential for attracting both visitors and investment to the area.

4.11 A popular visitor attraction for Stroud and for its residents, is the weekly Farmers Market which was launched in 1999 which was awarded the national Farmers Market of the year in 2007.

4.12 Stroud has a population of 110, 700 (ONS mid year 2008 estimate).

4.13 The Stroud District Local Plan defines the town centre as the historic core of the town which contains a broad range of facilities and services and also the focal points for public transport. The defined town centre incorporates parts of London Road, Rowcroft**,** Merrywalks Shopping Centre, High Street, King Street Parade, Russell Street, George Street, Kendrick Street, Union Street, Gloucester Street, Parliament Street, Church Street and The Shambles. The Local Plan identifies both primary and secondary shop frontages (Policy SH1 and SH2). The Primary Shopping Frontage is located on the High Street, King Street, King Street Parade and Kendrick Street. Secondary Shopping Frontages are located on Union Street, the north western end of London Road, Russell Street, George Street, Merrywalks Shopping Centre, Kendrick Street, Threadneedle Street and the far south eastern end of the High Street.

4.14 The Local Plan also identifies two areas within the town centre which have been identified for redevelopment:

- Policy SH5 allocated the bus station site on Merrywalks for mixed use development. This has since been developed into a retail, multi-screen cinema and bowling complex;
- Site MU5A of Proposal HN1 is a mixed use allocation which includes a large area at Cheapside Wharf (northern part included within the defined town centre). Mixed use proposals including residential, public transport interchange, public car parking and town centre uses.

Diversity of Uses

4.15 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of the centre as follows:

Table B: Retail Composition of Stroud Town Centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	9	3.8	14	6.0	11.87	9.5
Comparison	117	50.0	109	46.4	51.48	43.2
Service	82	35.0	78	33.2	21.83	34.0
Vacant	20	8.5	29	12.3	13.47	12.0
Miscellaneous	6	2.6	5	2.1	1.34	1.2
Total	**234**	**100**	**235**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.16 The above analysis identifies that the proportion of convenience uses is significantly below both the UK average and the Gloucester Market Towns (GMT) average. The GMT average has been taken from a number of comparable market towns within the County (Cheltenham, Gloucester, Tetbury, Tewkesbury, Cirencester). The proportion of comparison uses is generally in line with the UK average but has experienced a decline of 8 units since the previous survey undertaken in 2006.

Retailer Representation

4.17 Stroud town centre has the highest concentration of multiple retailers in the District. Multiple comparison retailers currently located within the town centre include: Clarks; Boots; Millets; Curry's; Dorothy Perkins; New Look; WH Smith; Peacocks and; Superdrug. The majority of these occupiers are sited on the High Street. The main convenience retailer within the town centre is Iceland.

4.18 There are a number of independent retailers within the town centre which centre on clothes, gifts and health products.

4.19 Outside of the defined town centre in Stroud there are a number of large format retail stores. Within the convenience sector, there is a Sainsbury's at Dudbridge, on the western periphery of the town, a Tesco's supermarket off Stratford Road which is to the north west of the town centre and Waitrose to the south east of the town centre. All three supermarkets are served by large surface car parks. Within the comparison retail sector, there is a Focus DIY store off Dudbridge Hill and a Homebase store to the west of the town centre.

4.20 In relation to the financial characteristics of retail property in Stroud, we have obtained data in relation to commercial yields on retail property. Commercial yields are the expected market rental of property as a proportion of the capital value (i.e. total price) of that property. As a measure of retail viability, commercial yields on retail floorspace are also a valuable indicator, but one that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time can provide an indication of the direction in which a particular town centre is moving. This trend can be compared with national levels of yield and with those towns of similar size and type, or with neighbouring and competing towns. In short, the lower the yield the better the performance of a centre. A comparative analysis of this type, conducted on a regular basis, can give an indication of how the viability of retailing in a town centre is changing. Table A below outlines the yield for Stroud between 2003 and 2008, compared with the trends within surrounding towns and other medium and large centres in Gloucestershire and Bristol.

Table C: Commercial Yields on Retail Property, 2003-2008

Centre	Apr 2003	Jan 2004	July 2004	Jan 2005	July 2005	Jan 2006	July 2006	Jan 2007	July 2007	Jan 2008	July 2008
Stroud	9.5	9.5	9.5	9.5	9.5	9.5	9.0	8.5	8.5	8.5	8.75
Tewkesbury	8.5	8.5	8.5	8.5	8.5	8.5	8.0	8.0	8.0	8.0	8.5
Cirencester	7.5	7.5	7.5	7.5	7.5	7.0	6.5	6.0	6.0	6.0	6.0
Gloucester	7.0	7.0	7.0	7.0	7.0	7.0	6.5	6.0	6.0	5.5	5.75
Cheltenham	6.0	6.0	6.0	6.0	6.0	5.0	5.0	5.0	5.0	5.0	5.0
Bristol (Broadmead)	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.5	5.5	5.5

Source: Valuation Office statistics

4.21 Table A only provides yield information up to July 2008 as no information was made available for 2009. The yields indicate that Stroud is currently being outperformed by all of the centres, albeit reasonable comparisons can not be drawn by analysing the larger centres of Gloucester, Cheltenham and Bristol (Broadmead). However, Cirencester is considerably outperforming Stroud in terms of yields and is also functioning as a market town and district centre. The retail yields for Stroud have fallen since 2003 with a slight increase in 2008. However, yields as a whole increased in 2008 due to the downturn in the market.

4.22 Rental information for Zone A retail space in Stroud has also been obtained and indicates that rental levels were at £40 sq m in 2008 (Table B). There is no information on rents in the other centres in the District. Therefore, in order to provide some useful comparisons, data has been identified, where possible, for centres outside of the District that have a relationship in terms of catchment:

Table D: Zone A Rental Levels, 1999-2008 (£/sq m)

Centre	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Stroud	35	35	35	35	35	35	35	40	40	40
Cirencester	-	-	-	-	65	65	70	70	70	70
Gloucester	95	105	105	120	120	125	130	130	145	145
Cheltenham	145	150	150	165	170	170	190	190	200	200
Tewkesbury	-	-	-		-	-	-	35	35	35
Bristol	175	175	175	180	180	185	185	190	200	200

Source: Focus

4.23 The information on rental values demonstrates that rental values in Stroud are considerably lower in comparison to other centres in the sub-region, with the exception of Tewkesbury which has the lowest rental values from those surveyed. However, given the size and draw of Stroud town centre, it cannot be expected to compete with those centres such as Cheltenham, Gloucester and Bristol. However, Cirencester provides a useful comparison given its status as a market town and its rents in 2008 were considerably higher than that of Stroud. Reviewing the data over the period since 1999, Stroud has remained consistent in terms of the rents being achieved in the centre with a slight increase from 2006 onwards. This pattern is largely indicative of all of the centres.

4.24 In addition to information from existing retailers and other business in Stroud, we have also obtained information on any known requirements from retailers and other businesses for representation in Stroud. Known requirements from retailers not already represented in Stroud (or wishing to move to other locations in the centre) are listed in the Retailer Requirements Table in Appendix V.

4.25 The schedule indicates that between 34,130 sq ft and 58,200 sq ft gross (3,171 sq m - 5,407 sq m) of additional floorspace is required in Stroud. The requirements are divided between the service and comparison sectors and include retailers such as: Marstons Plc; Café Nero; The Bakers Oven; Poundland; Edinburgh Woollen Mill; Country Casuals; Pets at Home; and Profile Clothing Ltd. All of the requirements have stated prime centre space for their respective requirements. However, Pets at Home is known to occupy edge or out-of-centre retail units and Bakers Dozen have expressed some interest for secondary retail locations.

4.26 The Retailer Requirements Table in Appendix V also lists those requirements which have stated interest in all of Gloucestershire. This then provides the opportunity for an additional requirement of up to 39,000 sq ft, the majority of which is for convenience uses.

4.27 Table C below sets out the total number of retailer requirements for Stroud and other neighbourhood settlements in Gloucestershire and Bristol over recent years. In other words, the table provides an indication of market interest from the retail sector in locating in Stroud and the other selected settlements. The table indicates that Stroud experienced an increase in the level of requirements up to 2007. However in the 2009 survey, there has been a significant decline. This pattern is largely replicated across the other centres as a result of a downturn in the economy. As previously stated, there are relatively few conclusions to be drawn through comparing Stroud as a centre with the major centres of Gloucester, Cheltenham and Bristol. However, useful comparisons can be drawn between that of Stroud, Cirencester and Tewkesbury. In terms of the quantum of requirements, Stroud is only out-performing Tewkesbury and falls below that of Cirencester. However, Cirencester has experienced a more significant downturn with the number of requirements peaking at 61 in 2004 and in 2009 this had fallen to 24.

Table E: Retailer Requirements in Stroud and Other Gloucestershire Towns, 1997-2009

Year	Stroud	Cirencester	Gloucester	Cheltenham	Tewkesbury	Bristol
2009	13	24	38	69	12	128
2007	27	58	76	139	23	156
2006	27	55	85	137	18	160
2005	33	59	90	140	18	158
2004	23	61	86	126	24	145
2003	26	52	83	117	18	146
2002	27	45	83	117	14	155
2001	15	27	69	113	6	139
2000	12	29	57	95	6	139
1999	9	21	59	94	6	136
1998	11	24	64	109	12	150
1997	12	19	64	100	9	136

Source: Focus

Proportion of Vacant Street Level Property

4.28 In 2006, there were 20 vacant units in Stroud town centre. Our re-survey of the town centre in 2009 indicates that vacant units have increased considerably to 29 units, or 12.3% of total units within the centre. This proportion now falls just above the UK average of 12% which indicates that the centre is potentially underperforming. However, vacancy rates are below that of the GMT average. A survey of the town centre indicates a concentration of vacant units within Merrywalks Shopping Centre and a relatively even dispersal amongst the remainder of the town centre.

Accessibility

4.29 Stroud is central to the rest of the district. Access from outside of the district is typically from Junction 13 of the M5, the A46 (from M4) and the A419. The town also has a train station situated on the London to Cheltenham line. Stroud is located close to popular walking routes including the Cotswold Way which makes it attractive to walkers as a destination. However, pedestrian and cycle access is somewhat constrained for day-to-day trips by the topography of Stroud and its surrounding valleys. With regards to specifically private vehicular access, there are a number of "pay and display" car parks which serve the town centre:

- Merrywalks / Rowcroft Retreat – 24 spaces
- Merrywalks Shopping Centre MSCP (private) – 205 spaces
- Cheapside – 187 spaces
- Parliament Street – 125 spaces
- Church Street – 78 spaces
- London Road MSCP – 358 spaces
- London Road surface car park – 139 spaces

4.30 The railway station in Stroud is located on Station Road with access from both Russell Street (town centre side) and Cheapside. The main public car park is located from the Cheapside access. The station building itself and the Russell Street entrance falls within the defined Stroud town centre boundary with parts of the primary and secondary shopping areas located within easy walking distance. The railway line serving Stroud is the London to Cheltenham line which also links Stroud with Swindon, Gloucester and Reading.

4.31 The bus station at Stroud is located at Merrywalks, within the defined town centre. Bus services run to nearby towns including Painswick, Nailsworth, Dursley, Minchinhampton, Wotton-under-Edge, Tetbury, Chipping Sodbury and Yate. Daily services are also provided to Gloucester, Cheltenham and Cirencester with connections available to Bristol and Tewkesbury. It also provides for the National Express service to London.

4.32 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous

2006 data. The data indicates that King Street retains its place as the busiest part of the town centre, followed by High Street and the Merrywalks centre, although High Street has risen above Merrywalks when the 2009 data is compared with 2006 data.

Customer Views and Behaviour

4.33 On-street surveys were carried out in November 2009. 226 interviews were undertaken, spread across Tuesday, Wednesday, Thursday, Friday and Saturday. The questionnaires were designed to obtain information on the shopping patterns and views of those spending time in six of the centres. The on-street surveys in Stroud identified the following:

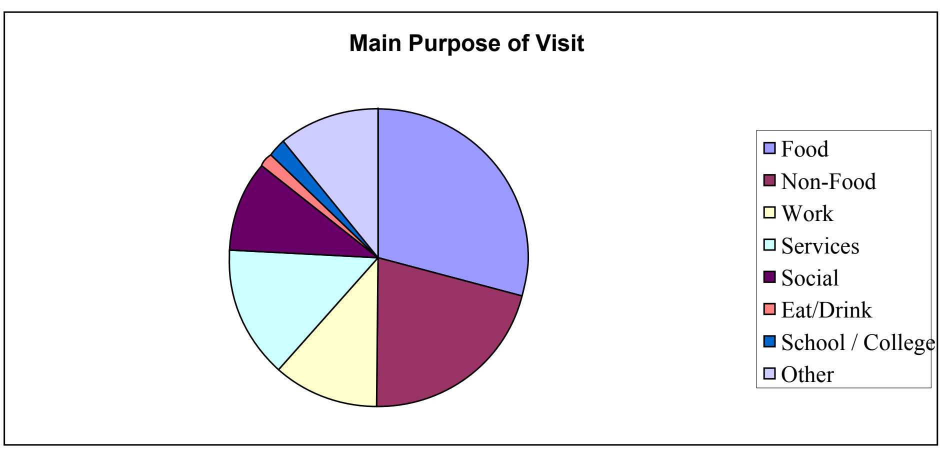
Question 1 – Postcodes

4.34 It is useful to understand the catchment area for the town centre. The survey did not find any one particular postcode which was dominant in terms of where the respondents lived. The majority of visitors to the town centre were from Stroud (55%). The other main areas where people had come from included: Stonehouse (7%); Gloucester (4%); Bristol (5%) and; Nailsworth (4%). There were also a number of respondents from outside the sub-region who were visiting the town.

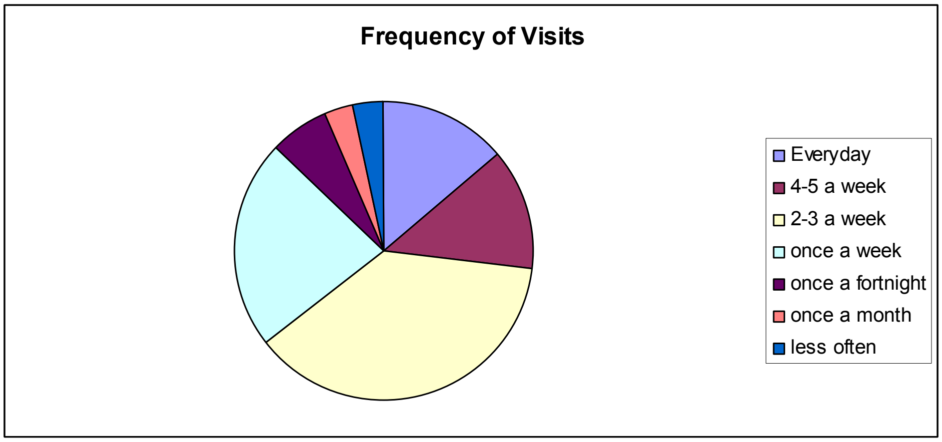
Question 2 – Type of Respondent

4.35 The findings from this question found that 82% of those surveyed were local residents as opposed to a visitor/tourist.

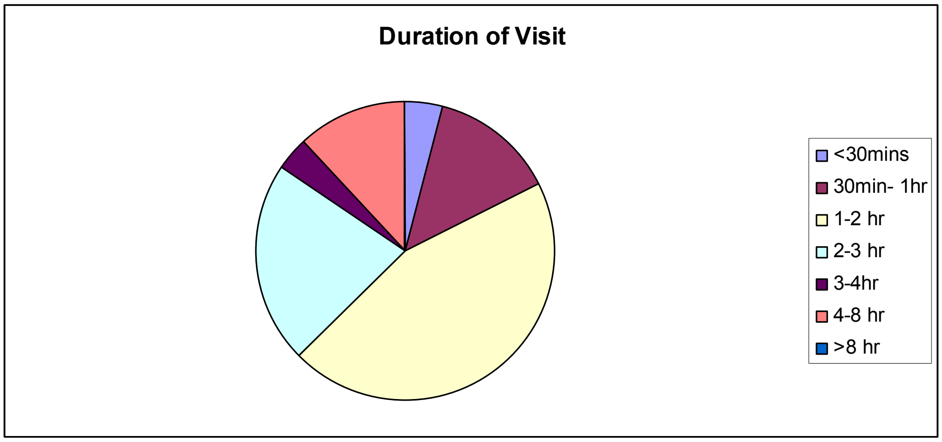
Question 3 – Purpose of Visit



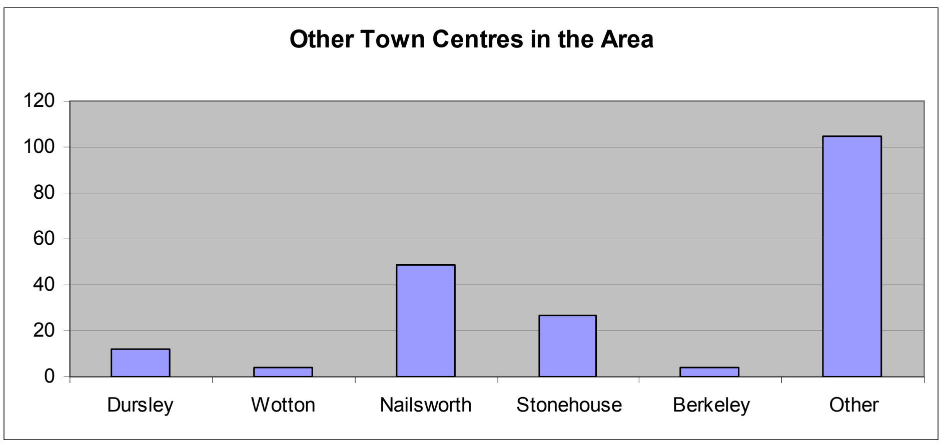
Question 4 - Frequency of Visits to the Town Centre



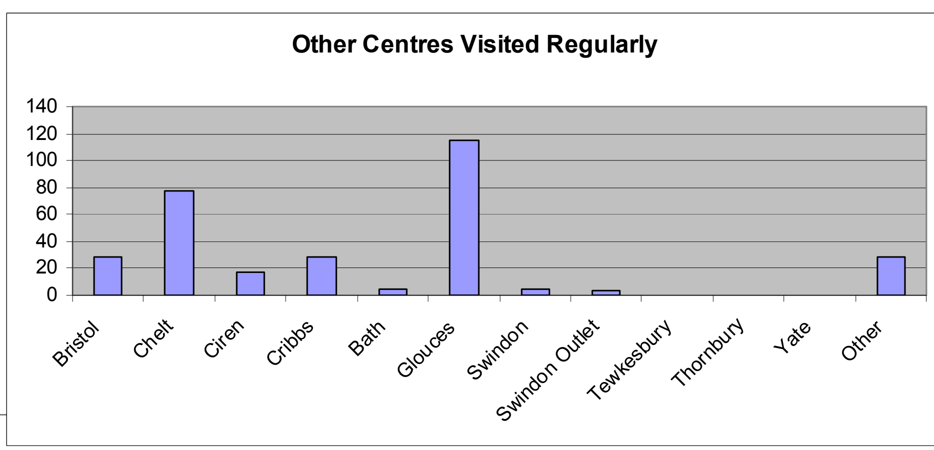
Question 5 – Duration of Stay



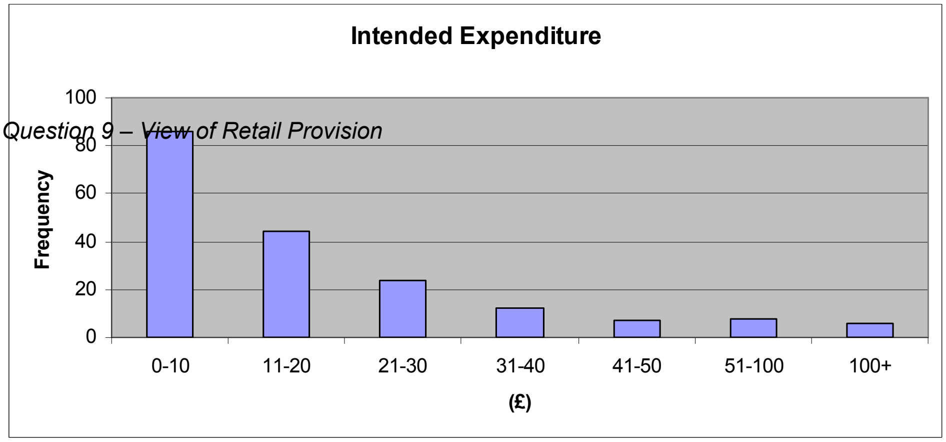
Question 6 – Other Town Centres in the area which are visited regularly



Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.36 When ascertaining the view of local residents with regards to the choice and quality of comparison goods, it was identified that 54% found the provision to be 'average' and 22% 'poor'. This was largely reiterated for the convenience sector. In terms of the range of services, the majority of respondents (52%) found this to be good.

4.37 An important factor in attracting visitors to the town centre is the ease of accessibility. In terms of public transport, the majority of respondents (42%) found accessibility to the town centre by public transport as 'average'. Access by car and foot was generally viewed more positively.

4.38 In terms of security and personal safety, 90% found this to be either good or average with only 7% rating it as poor.

Question 10 – Additional Shops and Services

4.39 The most common types of shops and services requested by respondents were a greater choice of clothes/shoe shops (58%), an increased number of multiple retailers (28%), more specialist/independent shops (49%) and additional public toilet facilities (31%)

Question 11 – Views of the Environment

4.40 In terms of overall attractiveness of the town centre, 65% rated this as average. Only 11% thought it was 'poor'.

Question 12 – Requested improvements to the town centre environment

4.41 In terms of improvements to the environment of the town centre, 44% of respondents surveyed in Stroud would like to see improvements to the public toilet facilities and 16%

requested additional litter bins. 18% of those asked did not believe that any further improvements were needed.

Question 13 & 14: Evening Economy

4.42 60% of those surveyed in Stroud do not visit the town centre at night which is a considerable loss of potential expenditure for the evening economy. The main reason for not visiting (42%) was that respondents questioned did not go out in the evenings. It was also found that 25% of people did not believe there was anything for their particular age group in the town centre at night, and 14% regarded the town centre as too far away from their home. Of those who do visit, 81% did so to socialise.

Question 17 & 18 – Transport and Parking

4.43 Of those surveyed in Stroud town centre, 40% had driven their car/van and 33% walked to the centre. Those using public transport (bus) accounted for 14% of those questioned. For those who drove into the centre, the most popular place to park was the NCP Multi-Storey in Stroud (23%). 53% rated the amount of car parking in the town centre as average. 64% of those surveyed were of the opinion that more frequent bus services would encourage them to use other forms of transport. 78% regarded the other forms of transport as too inconvenient and 26% viewed the bus services as too infrequent.

Question 22 – Visitors

4.44 The main reason for tourists visiting the town was to visit family or friends (38%) and 28% visited for shopping. With regards to first impressions of the town, 35% of respondents viewed there to be a good selection and quality of shops available whilst 22% favourably viewed the farmers market.

Stakeholder Engagement

4.45 A stakeholder meeting with local traders and businesses took place on the 10th December 2009 and identified a number of issues relating to the town centre (Summary of meeting contained within Appendix Q). These included:

- Poor gateways into the town centre
- Canal as an important regeneration opportunity
- Lack of public sector investment
- Limited range of venues for evening economy

State of Town Centre Environmental Quality

4.46 Stroud Town Centre benefits from its location at the heart of the 'Five Valleys' and its industrial and cultural heritage. The town centre itself is historic and therefore comprises of a number of streets with different widths and types of buildings. There are tight knit streets and alleyways which provide a unique character for the town centre but which also restrict the number of large retail units that are attractive to multiple retailers.

4.47 A useful source of information for appraising the public realm and character of Stroud Town Centre is the Public *Realm Strategy* which was published in January 2009 and prepared by New Masterplanning in association with the Stroud Concordat (Stroud District Council, Stroud Town Council, Gloucestershire County Council and Project Stroud). The historic town centre as defined in the Public Realm Strategy extends from London Road / Russell Street northwards to St Laurence's Church and Bank Gardens, enclosed by the Cornhill Link Road to the east and Merrywalks Shopping Centre to the west of Rowcroft and King Street. At the south eastern end of the High Street (top of the High Street in topographical terms) there are a number of narrow streets and alleyways which converge on the High Street. The historic centre is identified for its attractiveness as a destination for independent retailing, specialist markets (including the weekly Farmers Market), civic functions, listed buildings and public events.

4.48 The historic core at the south eastern end of the high street benefits from its countryside views and tight knit streets which offer interest to visitors. The Cornhill Market hosts the weekly farmers market which attracts a large number of visitors to the town on a Saturday. The Subscription Rooms which is located centrally, fronting George Street, provides an important civic and cultural function for the town. Green Space is provided in the form of Bank Gardens which is located at the rear of the north western end of the High Street. The Public Realm Strategy identifies the following three objectives to improve the offer of the town centre:

1. *To enhance the quality of the public realm within Stroud's historic centre and establish it as a distinct destination.*
2. *To simplify and clarify access to the town centre and establish a better balance in the pedestrian environment.*
3. *To identify opportunities for connecting and expanding the public realm to enable Stroud town centre to grow and improve its offer.*

4.49 The Strategy identifies a number of regeneration opportunities within the town centre. This includes; Either side of the Thames and Severn Canal (i.e. Cheapside and Fromeside); North of the High Street (Police Station, Parliament Street and Church Street car parks) and; the area between Rowcroft and Merrywalks north of the railway line.

Summary

4.50 Overall, Stroud as the main centre within the District is considered to be underperforming when compared to other market towns. In terms of the sub-regional hierarchy, the centre is outperforming Tewkesbury but falls considerably behind that of Cirencester and Yate. Information on rents and yields further substantiates this position.

4.51 Stroud has a number of assets, most notably the environment of the town centre and its unique arrangement of narrow streets and alleyways which host a number of historic buildings. The train station is located within easy walking distance to the primary shopping frontages and therefore presents a valuable opportunity for utilising public transport links. The town is also gaining increasing popularity with regards to its farmers market and this is an important asset which can be further enhanced to benefit the wider town centre.

4.52 Stroud as a centre, is not attracting a large number of multiple retailers given that it is the main shopping town within the District. This is partly due to the number of small units. This has led to Gloucester becoming the most popular retail destination for those requiring comparison goods (on-street survey 2009). However, Stroud does have a strong sector with regards to independent retailing and this should be further encouraged through the Council's economic development and business support functions (including further promotion on the back of the quality and diversity of the weekly farmers market, the amount and profile of the visitors which the market attracts, the potential that this can have for a wider permanent retail offer in the town centre).

4.53 The on-street surveys (2009) also identified a significant opportunity in further enhancing the evening economy which currently attracts a small proportion of those who regularly use the town centre during the day. Access to the town centre during the evening was identified as a key constraint in addition to the limited range of its offer with regards to its eating and drinking establishments and targeting different sectors of the population.

Nailsworth Town Centre

Structure of the Town Centre

4.54 Nailsworth is located approximately four miles south of Stroud and linked by the A46 which runs through the town centre and links the town to the M4 (Junction 18 approximately 15 miles to the south) and Bath beyond. Nailsworth is a market town which has a range of services to serve both its population and tourists who visit the town for its Cotswold setting and access to popular walks. Nailsworth was previously a small mill town and centre for brewing and there are a number of historic buildings which remain and contribute to the character of the town. Using the Gloucestershire County Council Mid-2008 Estimates for population, this identified the ward of Nailsworth as having a population of 6,739. Nailsworth is closely associated with Amberley and Woodchester and taking this into account, this equates to a wider population of 8,883.

4.55 The Local Plan defines the town centre as that which includes Old Market, Market Street, Fountain Street and George Street. The Primary Shopping Frontage covers a section of frontage on Old Market, the western side of Fountain Street and parts of the George Street frontage with the Morrisons supermarket located off George Street to the south east. Due to the concentration of historic buildings, there is a designated Conservation Area which incorporates the town centre boundary, albeit for a small section on Old Market (Police Station and Library) and George Street. The town is surrounded by a defined Area of Outstanding Natural Beauty (AONB).

Diversity of Uses

4.56 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table F: Retail Composition of Nailsworth town centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	16	15.7	16	15.4	11.87	9.5
Comparison	51	50.0	53	51.0	51.48	43.2
Service	26	25.5	26	25.0	21.83	34.0
Vacant	9	8.8	9	8.7	13.47	12.0
Miscellaneous	0	0	0	0	1.34	1.2
Total	**102**	**100**	**104**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.57 The above analysis identifies that the proportion of comparison units within the town centre is broadly in line with the GMT average. The provision of convenience shops is above that of both the UK and GMT average.

Retailer Representation

4.58 Nailsworth town centre does not have any multiple comparison retailers and instead has developed a niche market for independent shops. There are high street banks and a Lloyds Pharmacy but with regards to comparison goods, these are typically sourced in either Stroud or other centres. With regards to convenience goods, there is a Morrisons supermarket, a Co-op and a Tesco Express situated within the town centre. As with the comparison market, there are also a number of independent convenience stores offering a wide range of produce including local butchers, fruit and vegetables, farm produce etc.

Performance of the Town – Rents and Yields

4.59 Information on rents and yields is only available for Stroud Town Centre and therefore this report cannot analyse the performance of the town based on these elements.

4.60 There are not any known requirements for Nailsworth specifically. The Retailer Requirements Table in Appendix V does indicate those retailers which have stated an interest in the county of Gloucestershire as a whole. There are known requirements from convenience retailers, including Tesco, Budgens and Lidl.

Proportion of Vacant Street Level Property

4.61 In 2006, there were 9 vacant units in Nailsworth town centre and this has remained consistent. As a proportion of total units, the vacancy rate is lower than both the UK and the GMT average and therefore suggests that the centre is performing well in terms of demand for retail space.

Accessibility

4.62 The A46 is the main route into the town centre which provides connections linking Stroud to the M4, Bristol and Bath. The town no longer has an operating train station, with the nearest train station located at Stroud approximately four miles to the north. Nailsworth is a popular destination for walkers due to its surrounding landscape and also benefits from access to Stroud along the cycleway. However, pedestrian and cycle access is constrained for day-to-day trips by the topography of the town, especially for its older residents. With regards to private vehicular access, there are a number of public car parks which serve the town centre:

- Old Market East – 24 spaces
- Nailsworth Bus Station – 15 spaces

- Old Market West – 18 spaces
- Old Market, Rear of Police Station – 29 spaces
- Old Market, East of Bus Station – 49 spaces
- Newmarket Road – 33 spaces
- Comrades Club – 15 spaces
- Town Hall – 21 spaces

4.63 The bus station in Nailsworth is located within the town centre. Services are provided which link the town with frequent journeys to Stroud as well as daily services to Gloucester, Cheltenham, Painswick, Wotton-under-Edge, Nympsfield as well as other neighbouring villages. There are also links to Forest Green which is a large residential area that lies within the settlement of Nailsworth. Whilst it is located within easy walking distance to the town centre, the topography is prohibitive. The bus links from Forest Green also serve Gloucester and Cheltenham. There are restricted services in the evening, including to Stroud.

4.64 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous 2006 data. George Street and Old Market are the busiest locations in the town centre, with George Street the slightly busier location. Market Street and Fountain Street are the next busiest locations.

Customer Views and Behaviour

4.65 On-street surveys were carried out in November 2009. 100 interviews were undertaken and spread evenly across Tuesday, Thursday, Friday and Saturday. The questionnaires were designed to obtain information on the shopping patterns and views of those spending time in six of the centres.

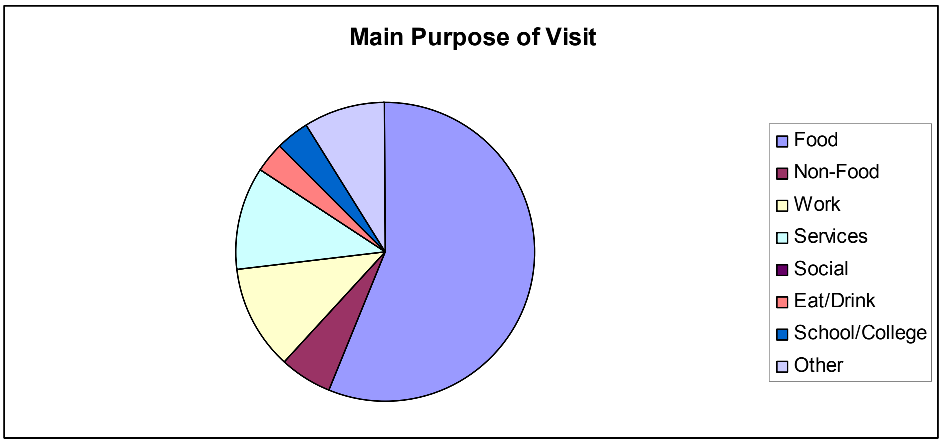
Question 1 – Postcodes

4.66 The on-street surveys in Nailsworth identified that 49% of those surveyed in the town centre were from Nailsworth. From Stroud, this accounted for 17% with the remainder from villages and elsewhere.

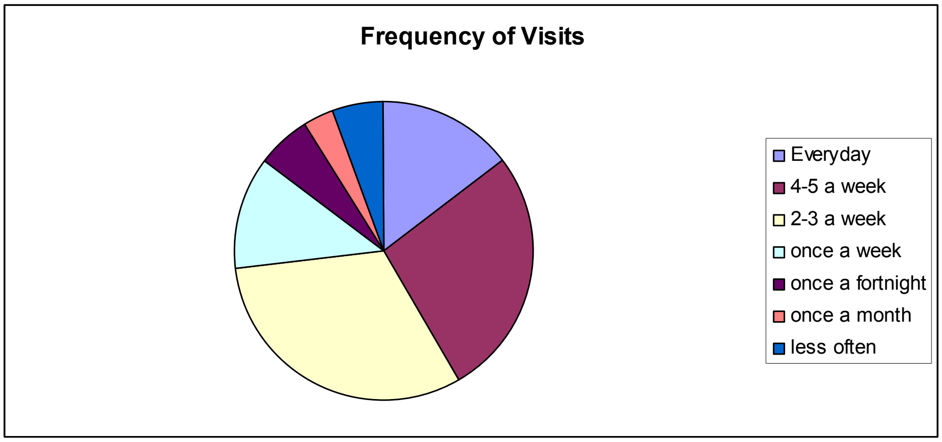
Question 2 – Type of Respondent

4.67 The findings from this question found that 89% of those surveyed were local residents as opposed to a visitor/tourist.

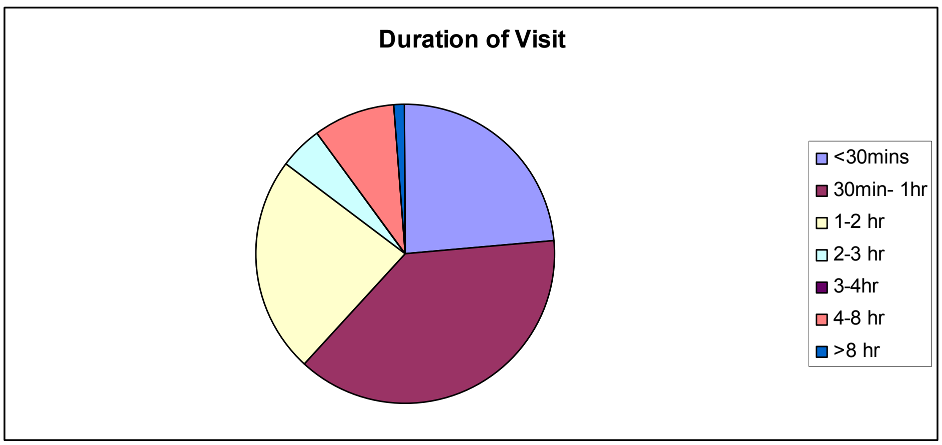
Question 3 – Purpose of Visit



Question 4 - Frequency of Visits to the Town Centre



Question 5 – Duration of Stay



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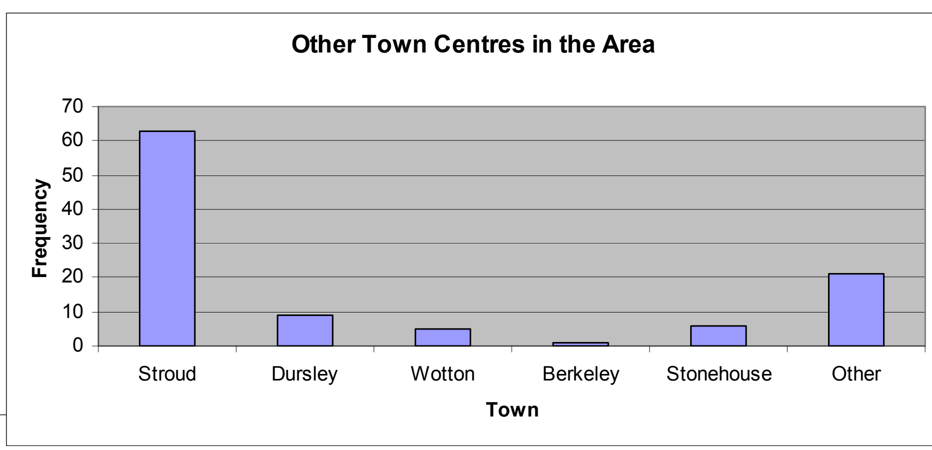
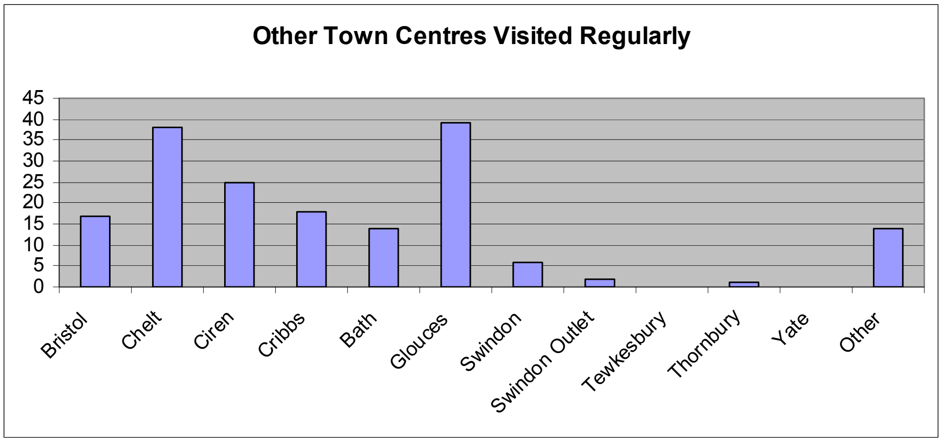
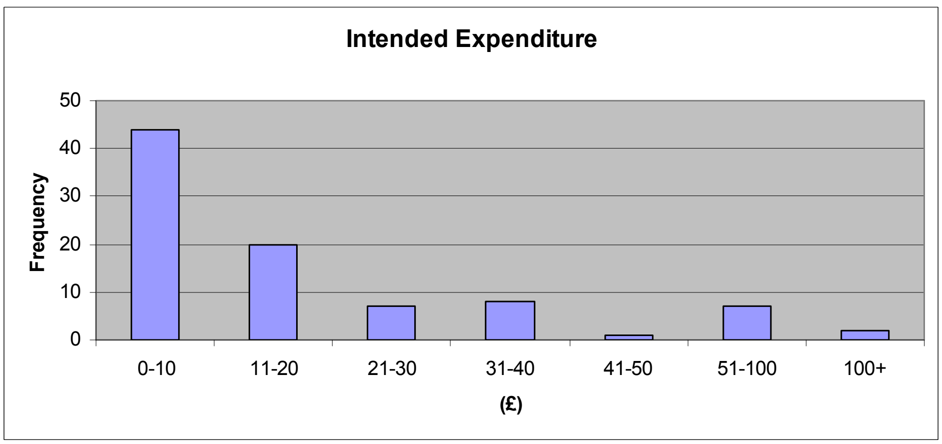


Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.68 When ascertaining the view of local residents with regards to the choice and quality of comparison goods, it was identified that 57% found the provision to be good and only 5% 'poor'. This was largely reiterated for the convenience sector with 60% rating the provision as good and only 2% as poor. This demonstrates that shoppers rate the choice and quality of retail in the town centre highly.

4.69 When asked about the range of services available in the town, 66% rated these as good. Accessibility by public transport was rated 'good' by 43% of those questioned with 29% rating it as average. Accessibility by car is generally good (56%). Security and personal safety was rated highly with 71% rating this as ‘good’ and only 2% as ‘poor’.

Question 10 – Additional Shops and Services

4.70 The most common types of shops and services requested by respondents were more food shops (24%), greater choice of clothes / shoes (18%) and more specialist stores (13%).

Question 11 – Views of the Environment

4.71 In terms of overall attractiveness of the town centre, this was rated highly with 70% rating it as good and no one rating it as poor.

Question 12 – Requested improvements to the town centre environment

4.72 In terms of improvements to the environment of the town centre, 30% of respondents surveyed in Nailsworth did not believe that any improvements were needed. 18% thought that more litter bins would improve the environment, and 12% sought better / more parking.

Question 13 & 14: Evening Economy

4.73 Of those surveyed, 62% did not visit the town centre at night and the main reason for this (59%) was that the respondent did not go out in the evenings. However, 10% did not believe there to be enough places to eat or drink and a further 10% felt unsafe and therefore didn’t’ visit the centre. Of those who do visit the town centre, 55% did so to access leisure and/or entertainment facilities. For people who regarded it as unsafe, the reason for this was too many youths in the town centre.

Question 17 & 18 – Transport and Parking

4.74 Of those surveyed, 45% had driven their car/van, 21% walked to the centre and 18% had travelled by bus. For those who drove into the centre, the most popular place to park was Morrisons car park (74%). Of those travelling by car, 66% rated the amount of on-street parking spaces as poor and in terms of the amount of general car parking spaces this was also rated quite poorly (50% as poor). Only 36% of those who travelled by car would even consider using alternative forms of transport and of those who would, 39% believed that more frequent bus services would encourage them to do so.

Question 22 – Visitors

4.75 The main reason for tourists visiting the town was to visit family or friends (36%) and 28% visited for work. With regards to first impressions of the town, 55% viewed there to be a good selection and quality of shops. 27% liked the area as a place to visit. The main negative points were with regard to traffic and parking (9%).

Stakeholder Engagement

4.76 A stakeholder meeting was held with representatives from Nailsworth Town Council on the 9th December 2009 (Refer to Appendix T for summary of the meeting). This identified the following issues pertinent to the town centre:

- *Good niche independent retailers*
- *Attractive environment*
- *Free town centre car parking is valued*
- *Further public transport links needed, especially to local villages and to Forest Green*
- *Problem of flooding*
- *Shortage of venues for young people*
- *Perception of low crime*
- *Redevelopment potential at Old Mill / Old Market*

State of Town Centre Environmental Quality

4.77 Those who frequently visit Nailsworth town centre, as identified in the on-street surveys, have a positive perception of its environmental quality. Market Street, Fountain Street and George Street are historic streets which offer a variety of building types with interconnecting side streets that provide interest. The majority of the town centre is located within the defined Nailsworth Conservation Area and there are a number of listed buildings. The buildings on Old Market Street are typically 1960s and there is a wide avenue incorporating the bus station. This presents a very different environment to the historic part of the town centre.

4.78 A useful source of information for assessing the town centre quality is the Nailsworth Design Statement (2008) which is adopted as Supplementary Planning Advice by Stroud District Council and forms a material planning consideration. The document was compiled by The Nailsworth Community Partnership.

4.79 This Statement was informed by a public survey which was conducted in 2005 and sought the views of residents with regards to the Days Mill / Old Market area of the town centre. The main conclusions from the survey were as follows:

- *The area is unattractive and 69% favoured change;*
- *There is a preference for mixed use development;*
- *Redevelopment generally viewed as acceptable but not at the cost of losing the existing free parking.*
- *The area could be made more attractive by preserving traditional buildings, providing more trees and access to the stream.*
- *The area provides important public services inc. the library and the police station whilst the shops are integral to the economic viability of the town.*

4.80 The study also identified a set of landmark buildings, features and views within the town which should be preserved and maintained (including their settings). These are identified as:

- Butcher Hill's Lane
- Clock Tower
- Copper Kettle (feature)
- War Memorial
- Fountain Street
- Old Railway Station
- Fountain (feature)
- Nailsworth Boy's Club

4.81 The study identifies a number of locations within the town centre which experience conflict with pedestrians and cars. However, at the town council meeting (9th December 2009) it was the view that the traffic congestion and the routing of the A46 through the town centre did slow traffic down. Narrow pavements, particularly on the east side of George Street, were identified in the study as resulting in pedestrians occasionally being forced to walk on the roadway.

Summary

4.82 Overall, Nailsworth town centre is performing well with a strong sector of independent niche retailers. The environment of the town centre is generally perceived positively.

4.83 The majority of those who visit the town centre do so to purchase goods from the convenience sector (on-street survey 2009) and stay in the centre for typically an hour or less. Whilst, the stakeholder meeting did identify a shortage of comparison units catering for specific groups of the population, it is recognised that generally people travel to Stroud or sub-regional centres for these goods. Nailsworth attracts a significant amount of trade due to its niche offer of local businesses and the performance of the centre is further substantiated by the low vacancy rates.

4.84 The major opportunity identified for the town is the existing Days Mill/Old Market section of the town centre which currently accommodates a collection of different uses presented in an arbitrary format. There is scope for the redevelopment of this area to provide a combined transport, retail, community and residential offer for the town which has strong links with the remainder of the centre.

Stonehouse Town Centre

Structure of the Town Centre

4.85 Stonehouse is situated in the Severn Vale approximately 3.5 miles from Stroud town centre and 1.5 miles from the outskirts of the Stroud conurbation. The M5 motorway runs to the west of Stonehouse with Junction 13 located approximately 2 miles from the town. The town is connected to Stroud by the B4008 and a bypass was constructed in the 1990s (A419) which provides a direct link to Dudbridge and also the villages of Kings Stanley and Selsley. Gloucester lies approximately 9 miles to the north. The Cotswold Way and the Stroudwater Canal restoration both lie within 1 mile of the town centre. The GCC Mid-2008 population estimates identified Stonehouse Ward as having a population of approximately 8,009.

4.86 The town now accommodates a significant amount of employment development within and adjoining the town. What were originally mills have been converted for industrial purposes and there are purpose built industrial and distribution estates at Oldends Lane and Bonds Mill. Stonehouse has its own train station close to the town centre which provides links to Birmingham, Cheltenham, Gloucester, Stroud, Swindon and London.

4.87 The adopted Local Plan defines the town centre as part of the High Street, Laburnum Walk and Queens Road. The Primary Shopping Frontage is located on parts of the High Street. There are no town centre redevelopment sites identified in the Local Plan.

Diversity of Uses

4.88 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table G: Retail Composition of Stonehouse town centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	8	14.5	7	12.3	11.87	9.5
Comparison	19	34.5	21	36.8	51.48	43.2
Service	25	45.5	25	43.9	21.83	34.0
Vacant	2	3.6	3	5.3	13.47	12.0
Miscellaneous	1	1.8	1	1.8	1.34	1.2
Total	**55**	**100**	**57**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.89 The above analysis identifies that the proportion of convenience uses has fallen but still remains above both the 'Gloucestershire Market Town' (GMT) average and the UK average. The proportion of comparison units is significantly below the GMT average. However, it is acknowledged that the GMT average is significantly higher than the UK average. Stonehouse town centre has a proportionally high level of service units and this has remained consistent since 2006.

Retailer Representation

4.90 Stonehouse town centre does not have any multiple comparison retailers. In terms of service provision there are high street banks within the town centre (Lloyds TSB, HSBC, Barclays, Natwest and the Stroud & Swindon Building Society. In terms of convenience provision, there is a Co-op on the High Street. Smaller convenience stores (Co-Op, Londis) are located in adjacent residential areas of the town that may draw shoppers away from the High Street.

Performance of the town – Rents and Yields

4.91 Information on rents and yields is only available for Stroud Town Centre and therefore this report can not analyse the performance of the town based on these elements.

4.92 There are no known requirements for Stonehouse specifically.

Proportion of Vacant Street Level Property

4.93 In 2006, there were 2 vacant units in Stonehouse town centre. Our re-survey of the town centre in 2009 indicates that this has increased to 3 units. These vacancies are different to the vacancies found in the 2006 survey. This is considerably below both the UK and GMT averages which indicates that there is not surplus supply.

Accessibility

4.94 Stonehouse is particularly accessible by private car with Junction 13 of the M5 located approximately 2 miles to the west. Furthermore, Stroud is in close proximity some 3.5 miles to the east. In terms of vehicular access, a public 'pay and display' car park is accessed off High Street and a private car park is adjacent to the Co-op store.

4.95 The train station in Stonehouse off Upper Queen's Road is located within walking distance to the town centre. This provides regular connections to Gloucester and Cheltenham as well as links to Swindon and London.

4.96 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous 2006 data. The busiest location is around the Police Station on High Street, followed by the area around the Post Office.

Customer Views and Behaviour

4.97 98 on-street survey interviews were carried out in Stonehouse in November 2009, including interviewing on Tuesday, Wednesday and Saturday. The questionnaires were designed to obtain information on the shopping patterns and views of those spending time in six of the centres.

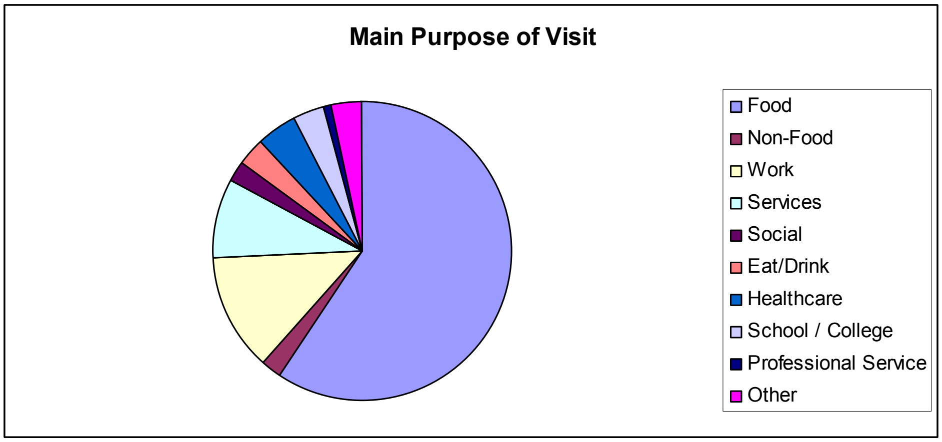
Question 1 – Postcodes

4.98 The on-street surveys in Stonehouse identified that 78% of those asked were from the town itself. The remainder were largely from Dursley and Gloucester.

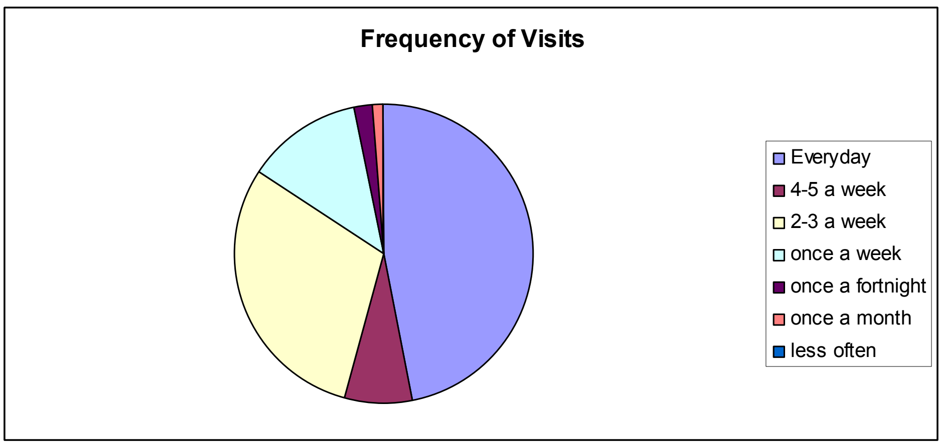
Question 2 – Type of Respondent

4.99 The findings from this question found that 96% of those surveyed were local residents as opposed to a visitor/tourist.

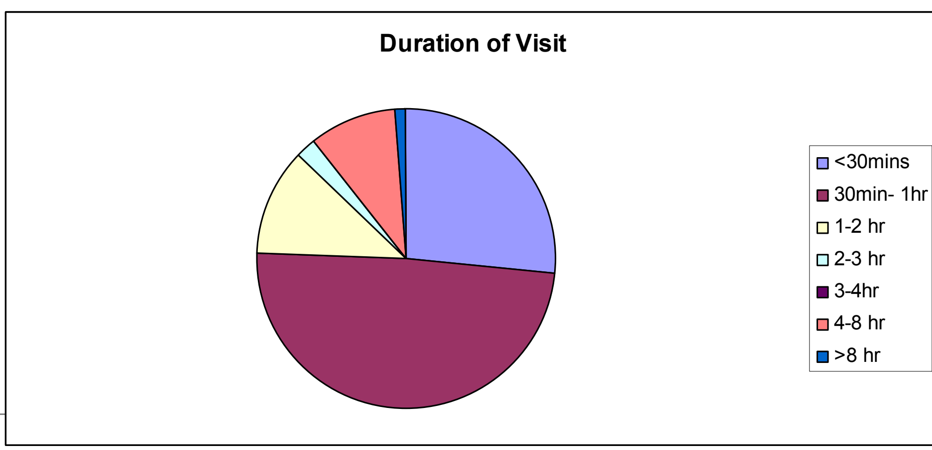
Question 3 – Purpose of Visit



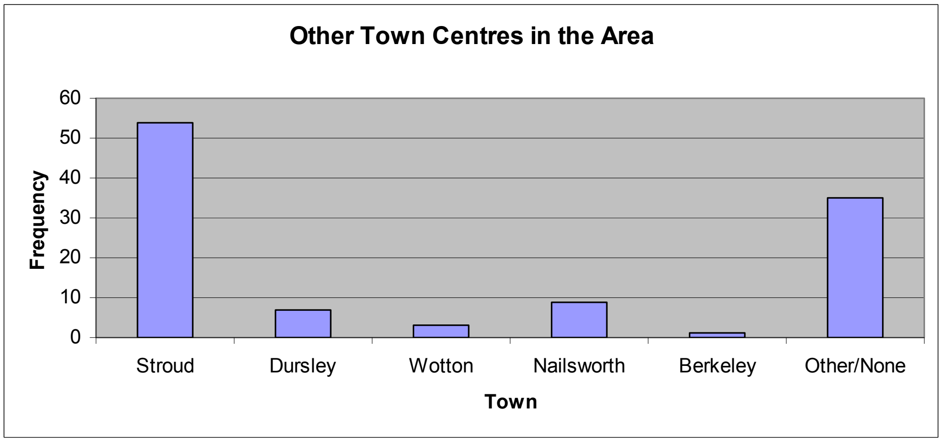
Question 4 - Frequency of Visits to the Town Centre



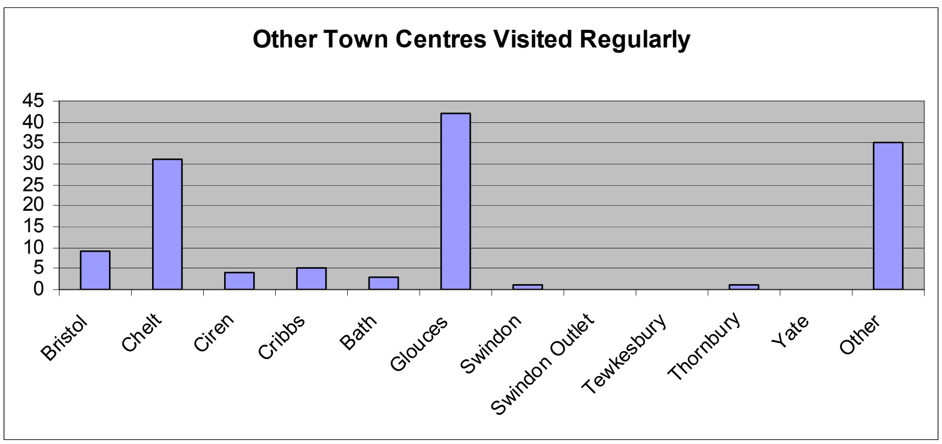
Question 5 – Duration of Stay



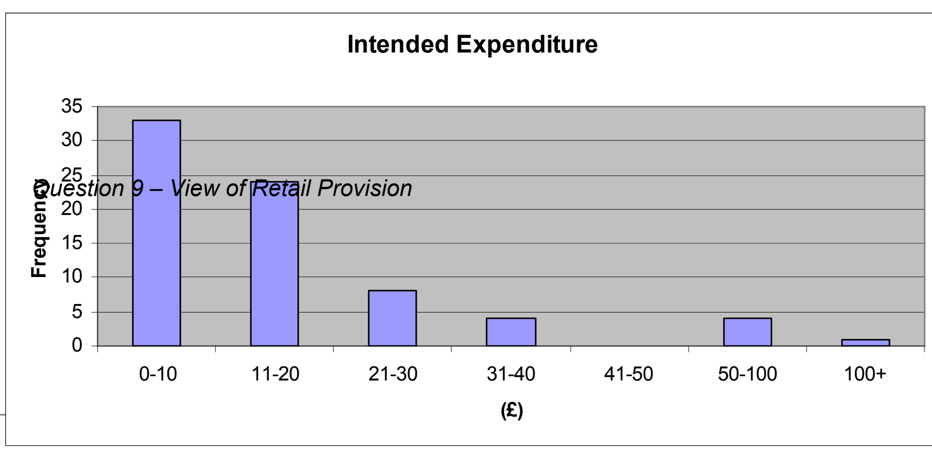
Question 6 – Other Town Centres in the area which are visited regularly



Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.100 The surveys in Stonehouse found that 40% of people asked regarded the choice and quality of non-food shops to be 'poor' as oppose to 25% who rated them as 'good'. With regards to food shops, this was rated higher with 42% identifying them as good. It would appear there is a wide range of services in the town centre, with 78% rating this as 'good'.

4.101 Accessibility to the town by public transport is generally rated as good (51%). Only 2% rate this as poor. These views are generally replicated with access by foot and cycle. Accessibility by car is also generally rated as good (63%).

4.102 In terms of security and personal safety, only 1% rates this as poor and 60% view this good.

Question 10 – Additional Shops and Services

4.103 The most common types of shops and services requested by respondents were clothes and shoes (63%), further chain stores (22%) and more food shops (20%).

Question 11 – Views of the Environment

4.104 In terms of overall attractiveness of the town centre, 49% viewed this as 'average' and 44% viewed it as 'good'. With regards to perceptions of security, 60% rated this as good and only 2% as 'poor'.

Question 12 – Requested improvements to the town centre environment

4.105 In terms of improvements to the environment of the town centre, 45% of respondents surveyed did not believe that any improvements were needed. Public toilets (17%), street cleaning (22%) and more litter bins (13%) were identified as aspects which could be improved.

Question 13 & 14: Evening Economy

4.106 Of those surveyed, a significant proportion (77%) do not visit the town centre at night. For those that do, the most popular reason (46%) was to visit places to eat and/or drink. For those who do not visit the town centre at night, the most common reason was that the respondent interviewed does not go out in the evenings. Only 6% of those who do not visit during the evenings did so because they felt unsafe.

Question 17 & 18 – Transport and Parking

4.107 Of those surveyed, 48% had driven their car/van, 38% walked to the centre and only 2% had travelled by bus. For those who drive to the centre the most popular place to park was at either the Co-op customer car park (48%) or the Council car park (10%). With regards the amount of car parking spaces, this was generally viewed as 'good' (79%). For those who accessed the town centre by car, only 27% would consider using alternative means of transport. More frequent bus services (39%) and more bus stops (23%) were regarded as improvements which would encourage people not to use their cars.

Question 22 – Visitors

4.108 The most popular reasons for visitors to the town who did not regard it as their local centre were to visit family and/or friends, shopping, work or college. 25% of those visiting were staying in a hotel or inn and 50% travelled by train.

Stakeholder Engagement

4.109 A stakeholder meeting with local traders and businesses was held at Stonehouse Town Council offices on the 8th December 2009 (minutes contained within Appendix U). The following issues relating to the vitality and viability of the town centre were identified:

- Good variety of town centre businesses
- Perception that some businesses were not adequately maintaining their premises
- Potential opportunity for highway to be adapted to a shared surface to improve road safety
- Need for improved pedestrian routes to the town centre and enforcement of public car parking

State of Town Centre Environmental Quality

4.110 A useful source of information for assessing the quality of the town centre environment is the Supplementary Planning Advice (SPA), the Stonehouse Design Statement which was adopted as guidance to inform future development in Stonehouse by Stroud District Council on the 10th November 2005.

4.111 The Design Statement acknowledges that there are a wide range of shops in around the High Street which provide for the majority of needs. The town centre is described as being concentrated along the High Street (from near its junction with Regent Street) northwards to The Green and extends along part of Queens Road.

4.112 The Statement identifies that the Town Greens complement and enhance the buildings within the town centre, providing individuality. Stonehouse Town Council have expressed a wish for this individuality to be preserved and where possible, enhanced.

4.113 The uniqueness of the town centre is also complemented by the varying widths of the pavements and forecourts. However, this has been identified as an element which could be restored and to incorporate native trees which previously existed along the High Street.

4.114 The Statement identifies the following groups of buildings and focal points along the High Street as those which are most appreciated by local residents (informed by a public consultation):

- The former Crown and Anchor public house and adjoining Grade II Listed stable and coach house fronted by one of the Town Greens. The Green is a popular gathering place for Saturday morning stalls etc.

- The other Town Greens and the distinctive buildings which overlook them including Orchard House and the Globe Inn.

4.115 With regards to recommendations for the Town Centre these are identified as preservation and enhancement of distinctive features including the Town Greens, the views from the High Street to the surrounding hills, buildings of individual style and the irregular frontages and forecourts. A highly motivated partnership has developed to review the amenity of the High Street environment. Plans have been developed and public consultation undertaken. Primarily the intent is to develop a shared spaces approach to the High Street in order to enhance the shopping environment and improve pedestrian accessibility.

Summary

4.116 Stonehouse is generally performing well as a centre which provides day-to-day needs for its residents. It is recognised that there is a shortage of comparison units but the on-street survey (2009) identified that the vast majority of those who regularly visit the town, do so for food related goods. Typically, people visit the centre for one hour or less. The centre has a low vacancy rate and benefits from both its good accessibility and the scale of employment development in and around the town. For goods outside of day-to-day requirements, it was identified that most people travel to Stroud, Gloucester and Cheltenham.

4.117 The evening economy has been identified as an opportunity for enhancing the health of the centre with respondents to the survey identifying a shortage of eating and drinking establishments within the town.

Dursley Town Centre

Structure of the Town Centre

4.118 Dursley is a market town and is located approximately 8 miles from Stroud. Gloucester is situated approximately 12 miles to the north and Bristol 25 miles to the south. The A38 runs to the west of the town and this provides connections to Junctions 13 and 14 of the M5. The Cam and Dursley railway station is located approximately 3 miles to the north east of the town. The Cotswold Way runs through the town centre. The GCC Mid-2008 population estimates identified the ward of Dursley as having a population of approximately 6,423.

4.119 Dursley is closely linked with Cam, although both settlements have their own defined town centre and services. Other villages in the locality include Stinchcombe, Coaley and Uley. The town itself sits on the edge of the Cotswold escarpment with the Severn Vale and River Severn to its west. Historically, Dursley was a large-scale manufacturing town with Lister Petter as its main employer. The majority of the Lister Petter site is in the process of being redeveloped for housing and mixed use development.

4.120 The Stroud District Local Plan identifies the town centre as Parsonage Street, the northern end of May Lane, Castle Street, the southern end of Long Street and part of Silver Street. The Primary Shopping Frontage is located on Parsonage Street. The entirety of the town centre is located within the Dursley Conservation Area.

4.121 In March 2010, a 20,000sq ft Sainsbury's store opened on land adjacent to Castle Street. This area of land is subject to an allocation in the Local Plan for a supermarket development. The store is served by a surface level car park which will be used by both customers to the store and town centre users. The Sainsbury's store will widen the convenience retail offer of Dursley and redress the balance of convenience shopping facilities between Cam and Dursley. Other key developments in the town include the redevelopment of Rednock Secondary School (built under the "Building Schools for the Future" programme) and the proposed Berkeley Vale Hospital on the Littlecombe (former Lister Petter) development

Diversity of Uses

4.122 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table H: Retail Composition of Dursley town centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	8	10.4	9	11.5	11.87	9.5
Comparison	39	50.6	35	44.9	51.48	43.2
Service	25	32.5	22	28.2	21.83	34.0
Vacant	4	5.2	11	14.1	13.47	12.0
Miscellaneous	1	1.3	1	1.3	1.34	1.2
Total	**77**	**100**	**78**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.123 The above analysis identifies that the number of convenience uses has fallen by one and that the current proportion is generally in line with the GMT average. The proportion of convenience uses has fallen to 44.9% which although slightly above the UK average, falls below the GMT average. Similarly, the proportion of service uses has fallen and lies between the UK and GMT average.

Retailer Representation

4.124 Dursley has a limited number of multiple retailers. In terms of comparison uses, there is a Co-op Pharmacy and Boots. There are no multiple retailers for clothes or shoes within the town. The town does accommodate high street banks. With regards to the provision of convenience retailers, the former Somerfield store on Parsonage Street is being refurbished to open as an Iceland store in July 2010.

Performance of the Town – Rents and Yields

4.125 Information on rents and yields is only available for Stroud Town Centre and therefore this report can not analyse the performance of the town based on these elements.

4.126 There are no known requirements for Dursley specifically. However, Gloucestershire- wide requirements may be relevant (see Appendix V).

Proportion of Vacant Street Level Property

4.127 In 2006, there were 4 vacant units in Dursley town centre. Our re-survey of the town centre in 2009 indicates that this has significantly increased to 11 units. The current proportion of vacant units is now above both the UK and GMT average which suggests that the town is struggling to maintain demand from the commercial sector and is an issue which needs to be monitored over the coming years alongside the effects of the Sainsbury's store. It is worth noting that some of these vacant premises have been used to host the "On View" arts project in the town

Accessibility

4.128 In terms of vehicular access, there are five main routes into the town. These provide links to Cam, Wotton-under-Edge, Tetbury and Berkeley. The junction to the A38 is located approximately 3 miles to the north west and this provides access to Bristol and Gloucester, as well as Junctions 13 and 14 of the M5. When driving to the town centre, the following public car parks are available to access the town centre:

- Sainsbury's (216 spaces)
- Dursley Pool – 92 spaces (free)
- Castle Street / Parsonage Street - 25 spaces (free)
- Long Street – 82 spaces (free)
- Water Street – 16 spaces (free)
- May Lane – 51 spaces (free)

4.129 The nearest train station is the 'Cam and Dursley' station which is located approximately 3 miles to the north east. With regards to bus services, there are daily services to Stroud, Gloucester, Berkeley, Wotton-under-Edge, Thornbury and Bristol.

4.130 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous 2006 data. Our data indicates that the area around Cobblers on Parsonage Street is now the busiest location and takes over from the area around Barclays (also on Parsonage Street). However, Parsonage Street as a whole remains the busiest part of the town centre.

Customer Views and Behaviour

4.131 103 on-street surveys were carried out in Dursley November 2009, spread across Monday, Friday and Saturday. The questionnaires were designed to obtain information on the shopping patterns and views of those spending time in six of the centres.

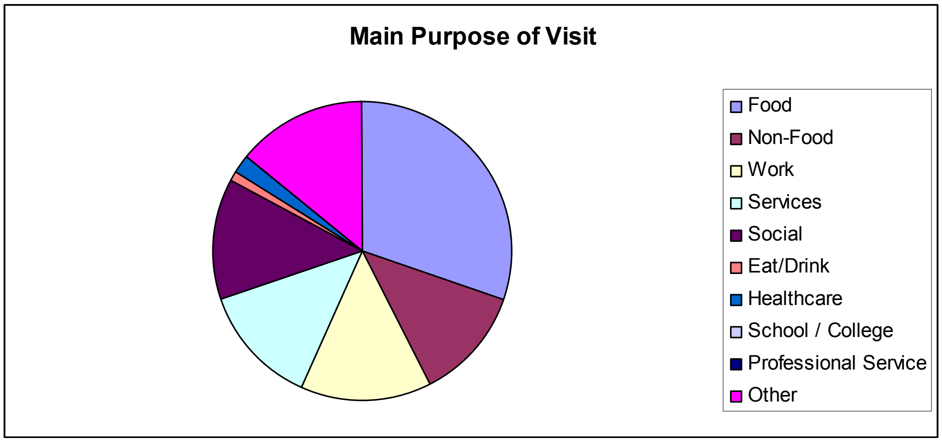
Question 1 – Postcodes

4.132 The on-street surveys in Dursley identified that 46% of those asked were from the town itself. A further 19% were from surrounding villages, including Cam, Coaley and Uley and 5% of those questioned were from Wotton-under-Edge.

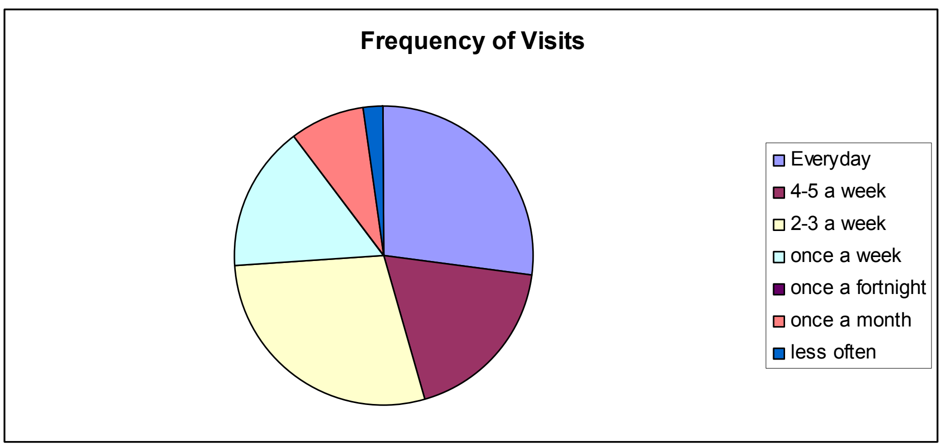
Question 2 – Type of Respondent

4.133 The findings from this question found that 85% of those surveyed were local residents as opposed to a visitor/tourist.

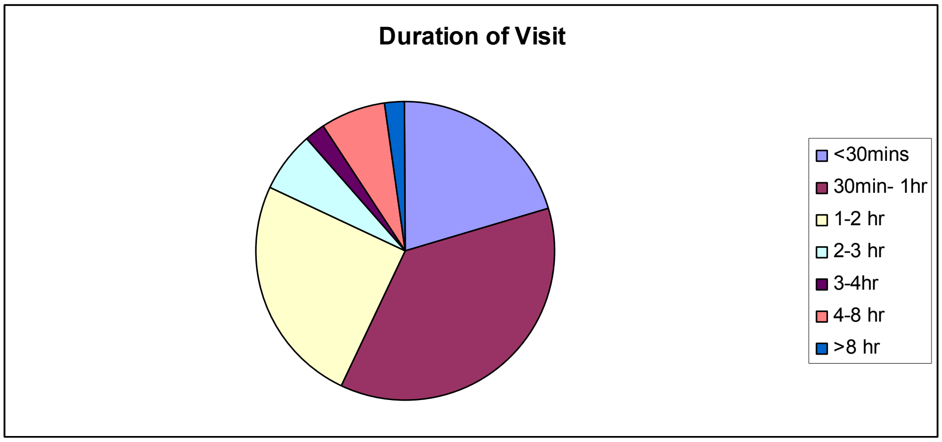
Question 3 – Purpose of Visit



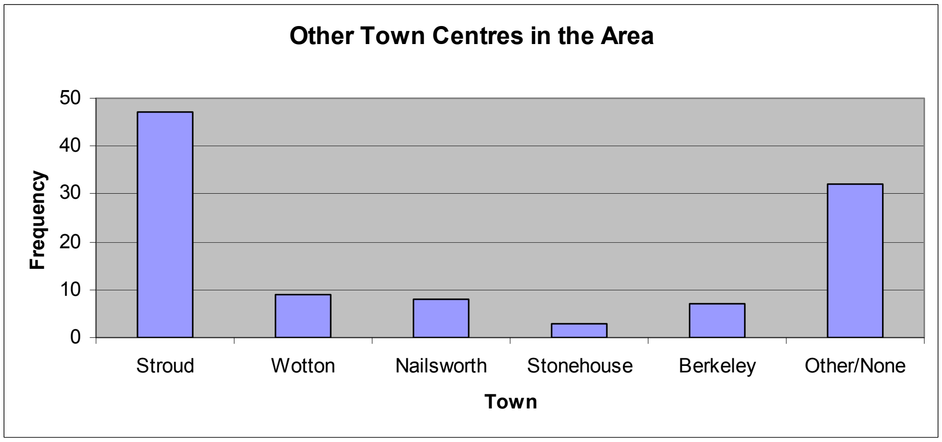
Question 4 - Frequency of Visits to the Town Centre



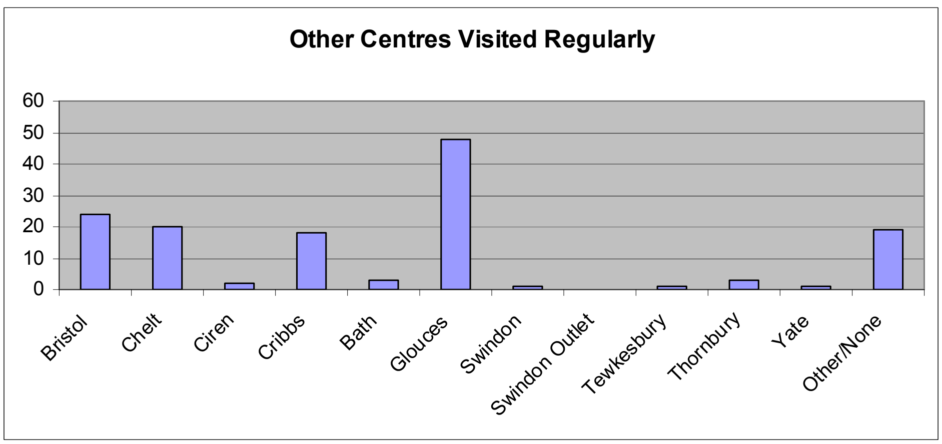
Question 5 – Duration of Stay



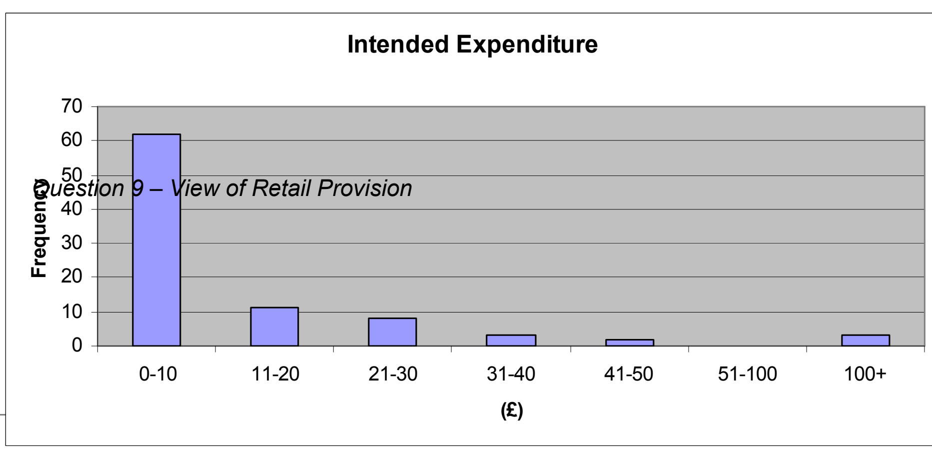
Question 6 – Other Town Centres in the area which are visited regularly



Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.134 In terms of non-food provision, those surveyed generally found the choice and quality of these shops to be average (53%) with 34% rating it as 'poor'. For convenience retailing, this was slightly more positive with 34% rating the choice and quality as 'good'. With regards to the range of service this was typically rated as either good (47%) or average (46%).

4.135 Accessibility by public transport was predominantly viewed as 'average' (36%). Accessibility by car was rated higher with 41% viewing this as good. Similarly, with regards to access by foot and cycle this was also predominantly viewed as good (46%).

4.136 Of those surveyed, 50% rated security and personal safety within the town centre as average.

Question 10 – Additional Shops and Services

4.137 The most common type of shop and/or service requested by respondents was a greater choice of clothes / shoes (56%). 20.5% of those questioned also specified a requirement for more chain stores and more specialist stores. It was also felt that a greater police presence within the town centre was required (10%).

Question 11 – Views of the Environment

4.138 In terms of overall attractiveness of the town centre, 36% viewed this as 'average' and 34% viewed it as 'good'. With regards to perceptions of security, 51% rated this as good and 8% as 'poor'.

Question 12 – Requested improvements to the town centre environment

4.139 In terms of improvements to the environment of the town centre, 15% thought the public toilet facilities required improving, 13% thought that further street cleaning would help and a further 13% would like to see more planting.

Question 13 & 14: Evening Economy

4.140 Of those surveyed, a significant proportion (64%) do not visit the town centre at night. For those that do, the most popular reason (81%) was to socialise. For those who do not visit the town centre at night, 25% did not believe there was enough leisure and entertainment facilities to encourage them to visit.

Question 17 & 18 – Transport and Parking

4.141 Of those surveyed, the most common method of accessing the town centre was walking (44%). A further 36% travelled by car (as driver) and 10% used the bus. Of those who had driven their own car to the town centre, 41% parked at the Dursley Pool car park and 18% had parked on the street. The survey found that out of those who drove to the centre, 36% would consider using alternative means of transport. Out of this 36%, the majority (57%) responded that more frequent bus services would encourage them to do so.

Question 22 – Visitors

4.142 The most popular reason for visitors to the town who did not regard it as their local centre was to visit family and friends (47%).

Stakeholder Engagement

4.143 A stakeholder meeting with local businesses, traders and representatives of both Cam Parish and Dursley Town Councils was held at Kingshill House on the 1st December 2009 (refer to Appendix R for the minutes). The main issues identified include:

- *Lack of 'easy' parking provision within Dursley town centre*
- *Opportunity to encourage people to stop in Dursley who would otherwise drive through*
- *Drop in trade as a result of the construction of the Sainsbury's store*
- *Queries over signage in the town centre.*
- *Opportunity to improve public realm on Parsonage Street, including the improvement of some of the buildings*
- *Restrictive nature of the conservation area*
- *Employment should be protected*

State of Town Centre Environmental Quality

4.144 Dursley is the second largest town centre in the District but has experienced decline with the loss of multiple retailers. Parsonage Street is pedestrianised with the rest of the town centre experiencing conflict between pedestrians and vehicles due to congestion and narrow pavements. A regeneration strategy 'Dursley Urban Design Framework' was published in 2007 which identified a number of proposals to aid the regeneration of the town. Since this strategy was published, there have been a number of improvements. Most notable, is the development of a Sainsbury's supermarket off Castle Street which opened for trade on March 17, 2010. It is expected that this will encourage more people into the town centre with the aim to attract new retailers and other businesses back into the town.

4.145 The Urban Design Framework also seeks to protect and enhance Parsonage Street as the main retail area. With regards to the notable increase in vacant retail units, the strategy seeks to encourage their efficient and appropriate use to improve the vitality of the town centre. It is believed there is also scope to further promote public transport, walking and cycling given the topography of the centre. The strategy also identifies specific improvements to the built environment, including building frontages, street surfaces, landscaping, the maintenance of public areas/facilities and the introduction of public art. A key project for delivery in 2010 is the paving scheme and environmental improvement of Market Square to improve the amenity and pedestrian access around the Grade II listed Town Hall.

Summary

4.146 Dursley has experienced a decline with regards to its comparison retailers and this is represented in the above average vacancy rates. The on-street survey identified that shoppers would like to see an increase in the range of comparison goods. Currently, people tend to travel to other centres, most notably Stroud, Cheltenham and Gloucester.

4.147 The town centre has experienced major development, most notably the construction of a large supermarket within the town centre which opened for trading in March 2010. This has the potential to significantly impact upon shopping patterns within the town centre and depending on its linkages, the wider town centre and existing primary shopping frontage.

Cam District Centre

Structure of the District Centre

4.148 The village of Cam adjoining Dursley to the north has experienced significant growth since the 1960's with residential estates at Norman Hill and Manor Avenue. The Local Plan defines a district centre as predominantly sited around the existing Tesco supermarket and the southern end of the High Street. The centre itself is relatively small, incorporating a 20,000sq ft Tesco store and its public car park, some undeveloped land to the north of Chapel Street and a few retail units fronting the High Street. The GCC Mid-2008 population estimate identified Cam East and Cam West wards to have a combined population of 8,276. This is a higher figure than that recorded for the Dursley ward.

4.149 Cam is situated approximately 2 miles from the A38 which provides links to Gloucester, Bristol and Junctions 13 and 14 of the M5. Cam and Dursley railway station is located approximately 2 miles to the north east.

Diversity of Uses

4.150 Information on the diversity of uses within the town centre boundary has been provided by GVA Grimley in October / November 2009. There is no previous land use data available to draw comparables over time. The composition of the district centre is as follows:

Table I: Retail Composition of Cam District Centre, 2009

Sector	2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%		
Convenience	2	18.2	11.87	9.5
Comparison	3	27.3	51.48	43.2
Service	4	36.4	21.83	34.0
Vacant	1	9.1	13.47	12.0
Miscellaneous	1	9.1	1.34	1.2
Total	**11**	**100**	**100**	**100**

Source: GVA Grimley surveys (2009)

4.151 Whilst the above date is useful, limited comparisons can be drawn with the UK and GMT average given the size of the centre and its dominance by a supermarket. There is a recognised under provision of comparison uses, only comprising 27% of the total uses. The types of uses that exist within the centre includes a hardware shop, hairdresser and food takeaways.

Retailer Representation

4.152 The only multiple retailer in the centre is Tesco. This is largely due to the size of the centre.

Performance of the Town – Rents and Yields

4.153 Information on rents and yields is only available for Stroud Town Centre and therefore this report cannot analyse the performance of the town based on these elements.

Proportion of Vacant Street Level Property

4.154 The survey in 2009 identified only one vacant unit which suggests that there no significant cause for concern. Comparison with the GMT and national average is not a meaningful exercise given the size of the centre.

Accessibility

4.155 There is one main route through Cam (A4135) which links the town to Dursley to the south and the A38 to the north. The B4060 leads to Stinchcombe and Wotton-under-Edge to the south. There is one Council car park located at Chapel Street which has 29 spaces. Tesco in the district centre has a large amount of customer parking.

4.156 The Cam and Dursley railway station is located at Coaley Junction, north of Cam and is situated on the Bristol to Birmingham line which also provides connections to Gloucester.

4.157 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our data confirms that the area around the Post Office is the busiest location, followed by the area around the florist on Chapel Street.

Customer Views and Behaviour

4.158 On-street surveys were not carried out at Cam due to its limited size and dominance by the main supermarket.

Stakeholder Engagement

4.159 A stakeholder meeting with local businesses, traders and representatives of both Cam and Dursley Town / Parish Councils was held at Kingshill House on the 1st December 2009 (refer to Appendix R for the minutes). The main issue identified for Cam related to the type of shops and services and whether these sufficiently cater for the needs of the existing population (and potential increase in population should development take place within the community). There is an identified opportunity for improved / expanded facilities in the plot of vacant land adjacent to the Tesco site. Potential impact on the health of the centre as a result of the new Sainsbury's supermarket in Dursley.

State of Town Centre Environmental Quality

4.160 The district centre comprises of a Tesco supermarket which was refurbished several years ago and was previously a Co-op. Adjacent to Tesco, there are 3 retail units which were built in the 1990s. In addition, there are retail units fronting the High Street which were developed in the 1960s, some with residential uses above. The district centre is centred on a mini roundabout and therefore does present some conflict with regards to pedestrians and vehicles. There is a pedestrian crossing on the High Street.

4.161 There is a vacant brownfield plot of land in the south eastern part of the defined town centre. This adjoins two residential properties which are now vacant. This provides an opportunity for redevelopment to extend and enhance the town centre**.**

Summary

4.162 Cam performs in line with its district centre status although the Tesco store does draw a significant amount of trade to the centre but this is typically limited to those visiting the supermarket as opposed to the remainder of the retail units. The environment of the centre itself is currently constrained by the dominance of the mini roundabout and consequently the volumes of traffic and also by the presence of a large vacant and cleared site which is situated adjoining the existing centre. This site presents an opportunity for the expansion of the town centre and its overall environment.

Wotton-under-Edge Town Centre

Structure of the Town Centre

4.163 Wotton-under-Edge is a market town and lies on the edge of the Cotswolds. It is situated in the southern part of the district. The town centre is situated entirely within the Wotton-under-Edge Conservation Area and the Cotswold AONB washes over the town. There are a number of listed buildings within the town centre. The town is particularly popular for walkers navigating the Cotswold Way that passes through the town centre. There are a number of specialist and independent retailers within the town. In addition to retail units, there are public houses, restaurants and an independent cinema.

4.164 In terms of accessibility, the main route through the town is the B4058 which links to Stroud to the north and the villages of Kingswood and Charfield to the south. Long Street (and the High Street) is subject to a one-way system.

4.165 The Stroud District Local Plan defines the town centre as Long Street, the High Street, Church Street and part of Market Street. Primary Shopping Frontage exists on Long Street and the High Street. There is a safeguarded employment site and an allocated housing site which both adjoin the centre. These two sites have been considered as part of the site assessment work.

Diversity of Uses

4.166 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table J: Retail Composition of Wotton-under-Edge town centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	10	13.2	9	11.3	11.87	9.5
Comparison	38	50.0	36	45.0	51.48	43.2
Service	25	32.9	27	35.0	21.83	34.0
Vacant	2	2.6	6	7.5	13.47	12.0
Miscellaneous	1	1.3	1	1.3	1.34	1.2
Total	**76**	**100**	**79**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.167 The above analysis identifies that the proportion of convenience uses is generally in line with the GMT average. The number of comparison units has fallen and, although above the UK average, are now under the GMT average. With regards to the proportion of service units in the town, this is significantly above the local average and slightly above that of the UK average. The predominant type of units is the town centre is that of comparison goods.

Retailer Representation

4.168 Wotton-under-Edge has a large number of independent retailers and caters for niche markets. With regards to the multiple retailers in the comparison sector, there is a Lloyds Pharmacy. For the convenience sector, there is a Co-op and a Tesco Express. High Street banks are represented in the form of a Lloyds TSB, Cheltenham & Gloucester, NFU Mutual and a Natwest.

Performance of the Town – Rents and Yields

4.169 Information on rents and yields is only available for Stroud Town Centre and therefore this report can not analyse the performance of the town based on these elements.

4.170 There are no known requirements for Wotton-under-Edge specifically.

Proportion of Vacant Street Level Property

4.171 In 2006, there were 2 vacant units, however this had risen to 6 vacancies in 2009. The proportion of vacancies in Wotton still falls below both the UK and GMT average, although there is a need to monitor the length of time these vacancies remain to ensure that the recent increase is a symptom of the recent economic downturn rather than a more specific issue for Wotton.

Accessibility

4.172 The main route running through the town is the B4058 and within the town, there is congestion at peak times due to the level of on-street parking on Haw Street and Old Town. The town centre itself is a one-way street with on-street parking. When accessing the town centre by car, there are a number of free public car parks:

- *The Chipping – 74 spaces (free)*
- *Potters Pond – 23 spaces (free)*

4.173 There is also parking available at the Co-op car park (to the rear of Long Street) and the Civic Centre (off Old Town).

4.174 In terms of accessibility on foot and bicycle, the town itself is hilly and Long Street and the High Street slope from west to east. This does limit the opportunity to walk to the centre for those with mobility problems.

4.175 The nearest train station is the 'Cam and Dursley' station which is located approximately 5.5 miles to the north.

4.176 With regards to bus services, there is not a bus station in the town. However, there are buses which stop at the War Memorial on Old Town which provide links to Stroud, Nailsworth, Dursley, Thornbury, Gloucester and Bristol.

4.177 The town is located approximately 4.5 miles from Junction 14 of the M5, with Bristol located approximately 15 miles to the south and Gloucester, 20 miles to the north.

4.178 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous

2006 data. Like the 2006 survey, our 2009 data confirms that the Rope Walk / Long Street and Orchard Street / Long Street junctions are the busiest parts of the town centre.

Customer Views and Behaviour

4.179 On-street questionnaires were carried out in November 2009. 75 interviews were undertaken, on Monday and Saturday. These questions were intended to understand the shopping patterns and views of those spending time in six of the centres.

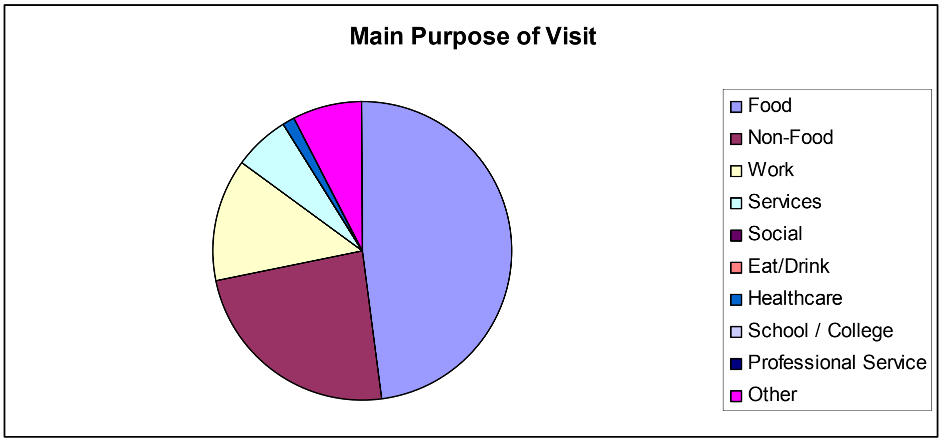
Question 1 – Postcodes

4.180 The on-street surveys in Wotton-under-Edge identified that the majority (59%) were from the town. The other main towns/villages of respondents were those of Charfield and Kingswood.

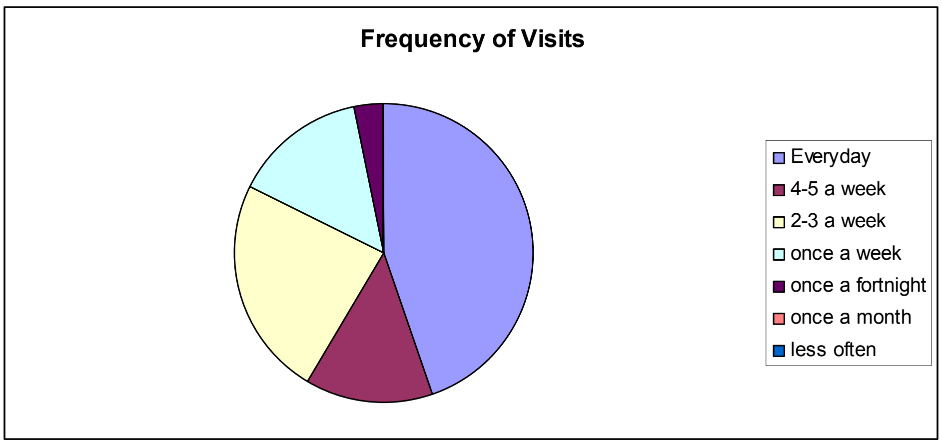
Question 2 – Type of Respondent

4.181 The findings from this question found that 89% of those surveyed were local residents as opposed to a visitor/tourist.

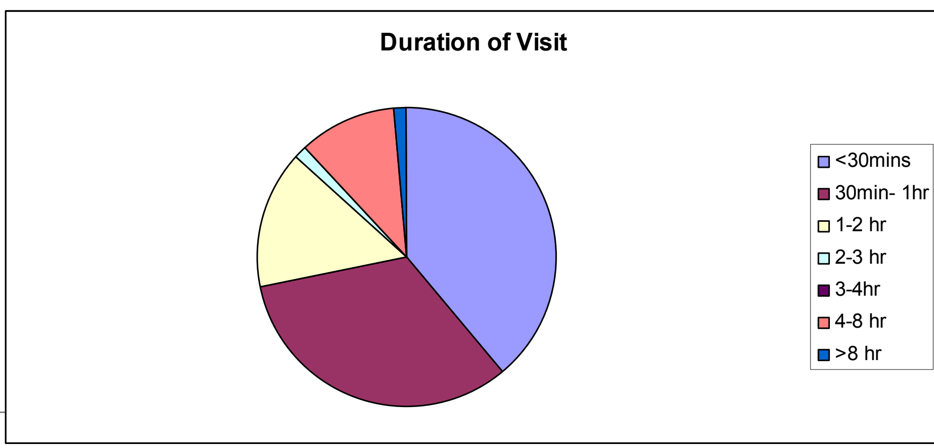
Question 3 – Purpose of Visit



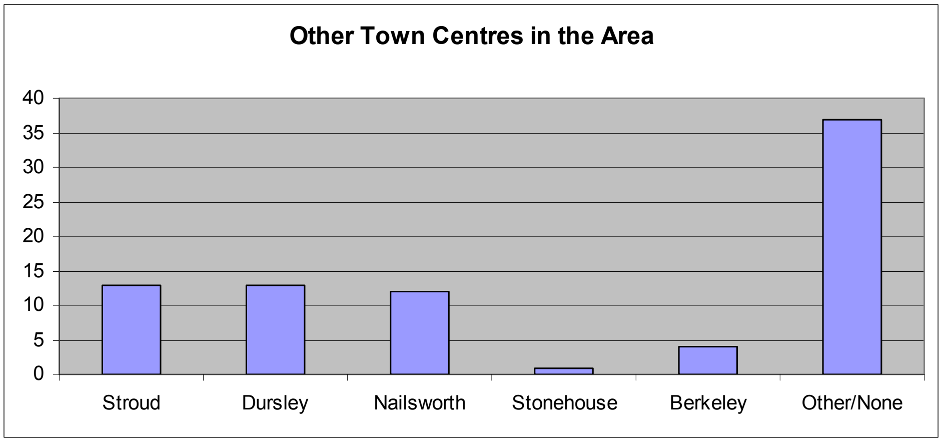
Question 4 - Frequency of Visits to the Town Centre



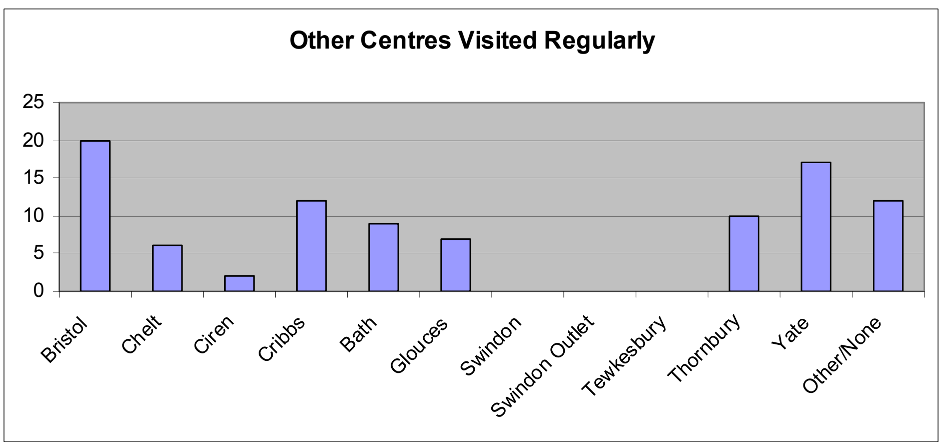
Question 5 – Duration of Stay



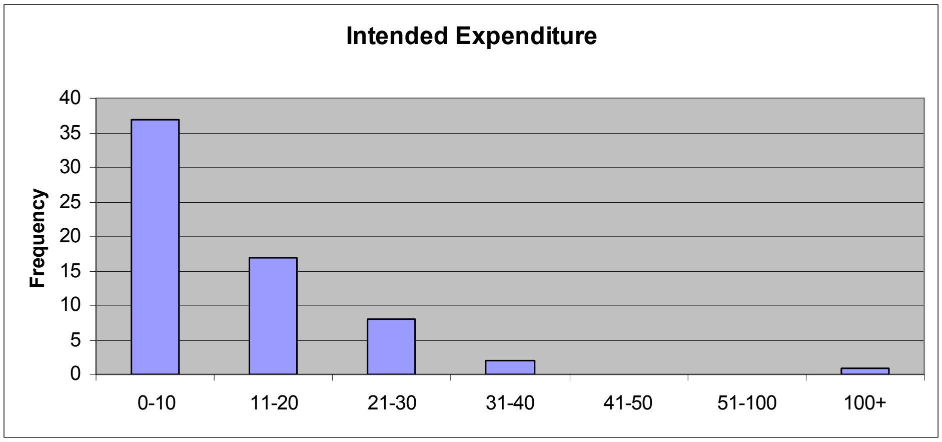
Question 6 – Other Town Centres in the area which are visited regularly



Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.182 In terms of non-food provision, those surveyed found the choice and quality to be largely either good or average. In terms of food shops, 48% rated the choice and quality to be 'good' and 38% as average. The range of services scored highly with 58% rating this as 'good'.

4.183 Accessibility by public transport was rated quite poorly with 48% rating this as 'poor' and only 3% 'good'. Accessibility by car, however, scored better with 33% rating this as 'good'. Accessibility by foot and bicycle is generally rated positively with 54 rating this as 'good'.

4.184 With regards to security / personal safety, this scored highly and only 1.5% viewed it as 'poor'.

Question 10 – Additional Shops and Services

4.185 In terms of additional shops and services, the most popular response was to see more food shops in the town. Other additional shops and services that came out of the survey included a greater choice of clothes / shoes and more specialist shops (13%).

Question 11 – Views of the Environment

4.186 In terms of overall attractiveness of the town centre, this was rated highly with 76% viewing this to be 'good' and only 2% as 'poor'.

Question 12 – Requested improvements to the town centre environment

4.187 In terms of improvements to the environment of the town centre, 30% of those asked did not believe any improvements were needed. 18% identified that more seating areas and benches as an improvement they would like to see and 12% sought more or better parking provision.

Question 13 & 14: Evening Economy

4.188 In terms of those who visit the town centre during the evening, this proved more popular than other towns with 57% of those questioned visiting. For those that do visit, the most common reason for doing so is to visit leisure or entertainment facilities. The most popular reason for those who do not visit is that the respondent does not go out in the evenings (59%).

Question 17 & 18 – Transport and Parking

4.189 The most popular method for those accessing the town centre in the survey was walking (46%) followed by use of the private car (45%). Only 2% travelled in by bus. Of those questioned who drove into the centre, 40% parked on the street and 26% parked in the Co-op car park. On-street parking is therefore a popular choice and yet 37% of those travelling by car regarded this provision to be 'poor'. Similarly there is a poor perception of off-street car parking with 60% of those travelling by car viewing this provision as 'poor'.

4.190 Of those travelling by car, 43% would consider using alternative forms of transport and the most common type of improvements that would encourage them to do so came out as more frequent and new bus services.

Question 22 – Visitors

4.191 The most popular reason for visitors to the town who did not regard it as their local centre was to visit family and friends (50%) and 25% came to see the town's attractions.

Stakeholder Engagement

4.192 A stakeholder meeting with representatives from Wotton Chamber of Trade, The Regeneration Partnership and local traders was held at Wotton-under-Edge Civic Centre on the 24th November 2009 (refer to Appendix S for the minutes). The main issues identified include:

- *Good range of specialist shops which are enhanced by the high quality environment of the town centre*
- *Perceived lack of short-term parking*

- *Limited public transport provision*
- *Potential redevelopment opportunity identified at the Renishaw Old Market site for food retail – would need to be well integrated into wider town centre*
- *Good range of services available within the town*
- *Problems associated with traffic congestion*
- *Large number of charity shops which restrict other potential occupiers*
- *Shortage of facilities for young people*
- *Higher perception of crime than actual figures suggest*
- *Importance of tourism*

State of Town Centre Environmental Quality

4.193 The town centre falls within a designated Conservation Area and there are a high proportion of listed buildings. Therefore there is limited scope for redeveloping existing properties. The properties themselves have a strong pattern of burgage plots and this is regarded as an important element of the historic character of the conservation area.

4.194 On the High Street and Long Street, some of the existing retail units were once houses and may date back to the late middle ages. The most notable building in the High Street is the 18th Century town house which is now occupied by Natwest Bank. The town centre is also host to a set of Almshouses on Church Street which are open to the public to view.

4.195 The High Street and Long Street slopes downwards from east to west. There have been recent improvements in the form of traffic calming on Long Street to slow vehicles. Wotton-under-Edge has a Chamber of Trade and has a part-time Town Centre Manager to ensure the vitality of the shops within the town is retained and enhanced.

Conclusion

4.196 Overall, Wotton-under-Edge performs well as a market town which provides for most of the day-to-day needs of its residents. The environment of the town centre is perceived positively and the historic buildings attract visitors to the town. There is a successful independent and niche sector with regards to retailers and this is viewed positively by the town's residents and traders. The evening economy also performs well when compared to other towns in the district and caters for a wider proportion of the residents.

4.197 The on-street surveys identified that shoppers would like to see additional food provision within the town. Currently, this is the predominant reason for those visiting the centre and they tend to do this on a daily basis and stay in the centre for one hour or less. For goods not available in the centre or for those requiring a large supermarket, it was identified that most people travel to Bristol (including Cribbs Causeway), Thornbury, Dursley and/or Nailsworth.

4.198 The on-street surveys and the stakeholder meeting both identified a lack of public transport provision in the town. With no railway station in or close to the town, public transport is largely reliant on bus links which are currently infrequent.

Berkeley Town Centre

Structure of the Town Centre

4.199 Berkeley is situated within the Severn Vale in the far west of the District. It is situated between Bristol and Gloucester, approximately 1.5 miles from the A38. Historically, the Parish of Berkeley was the largest in Gloucestershire. The town is now popular as a tourist destination with Berkeley Castle as its major attraction alongside the Edward Jenner Museum and nearby Cattle Country Adventure Park and the Wildlife and Wetlands Trust at Slimbridge To the north of Berkeley is Sharpness which is primarily an industrial port.

4.200 There is currently a community hospital located within the town and adjoining the town centre. This is due to close following its planned relocation to Dursley in 2012.

4.201 Berkeley town centre consists of primarily small retail units which are typically local in their character and provide for the day-to-day shopping needs of local residents and tourists. The town can either be accessed by car or a limited bus service. The nearest train station is located at Cam and Dursley approximately 6.5 miles to the east.

4.202 The Stroud District Local Plan defines the town centre as incorporating Market Place, the far northern end of the High Street, the western part of Canonbury Street and the eastern section of Salter Street. Given the size of the centre, the Local Plan does not identify primary shopping frontages and the whole centre is covered by Policy SH9. This is to protect the small number of retail units (Class A1) that exist within the centre to prevent the undermining of its retail function. The town centre lies within the Berkeley Conservation Area and there are a number of listed buildings.

4.203 Currently a partnership has formed to review the local amenity and accessibility of the town centre. Initial draft proposals make suggestions about new planting and re-arrangement of parking spaces to provide environmental enhancement.

Diversity of Uses

4.204 Information on the diversity of uses within the town centre boundary has been obtained from Colliers CRE/ Beacon Research (2006) and updated by GVA Grimley in October / November 2009. This information indicates the composition of the centre as follows:

Table K: Retail Composition of Berkeley town centre, 2006-2009

Sector	2006		2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%	No	%		
Convenience	4	14.3	4	14.3	11.87	9.5
Comparison	9	32.1	9	32.1	51.48	43.2
Service	10	35.7	10	35.7	21.83	34.0
Vacant	5	17.9	5	17.9	13.47	12.0
Miscellaneous	0	0	0	0	1.34	1.2
Total	**28**	**100**	**28**	**100**	**100**	**100**

Source: Stroud District Council data (2006) and GVA Grimley surveys (2009)

4.205 The above analysis identifies that the proportion of retail uses within the town centre has remained unchanged since 2006. It identifies a potential under-provision of comparison units when compared with both the UK and GMT average. There is an above average proportion of convenience uses.

Retailer Representation

4.206 There are no multiple retailers in the comparison sector within Berkeley which is largely expected given the size of the centre and its relative remoteness from the remainder of the District. In terms of convenience provision, there is a small Co-op store, serving a top-up food shopping function. There is a Natwest bank but no further high street banks.

Performance of the Town – Rents and Yields

4.207 Information on rents and yields is only available for Stroud Town Centre and therefore this report can not analyse the performance of the town based on these elements.

4.208 There are no known requirements for Berkeley specifically.

Proportion of Vacant Street Level Property

4.209 The number of vacant units in the town has remained unchanged since 2006, although some of the vacant units in 2009 are not the same as those in 2006. The units which have remained vacant over this period are: 15a Canonbury Street, 5 High Street and 2 High Street. There are currently 5 vacant units which equates to 17.9%. This figure is above both the UK and GMT average and therefore suggests that the centre is underperforming. However, the consistent nature of vacancy rates does not suggest a worsening decline.

Accessibility

4.210 Berkeley is situated approximately 1.5 miles from the A38 which provides access to Gloucester to the north (15 miles) and Bristol to the south (15 miles). When driving to the town there is on-street parking and car parks located at:

- *Marybrook Street – 27 spaces (free)*
- *Berkeley Library – 29 spaces (free)*

4.211 The nearest train station is the 'Cam and Dursley' station which is located approximately 6.5 miles to the east. With regards to bus services, there are limited daily services to Sharpness, Dursley, Gloucester, Bristol and Thornbury.

4.212 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Our 2009 pedestrian flow counts are also compared with previous 2006 data. Market Place is assessed to be the busiest location, followed by Salter Street and opposite the Town Hall on Marybrook Street. In the previous 2006 pedestrian flow count survey Marybrook Street was assessed to be the busiest location.

Customer Views and Behaviour

4.213 50 on-street surveys were carried out in Berkeley in November 2009, spread evenly across Tuesday and Saturday. The questionnaires were designed to obtain information on the shopping patterns and views of those spending time in six of the centres.

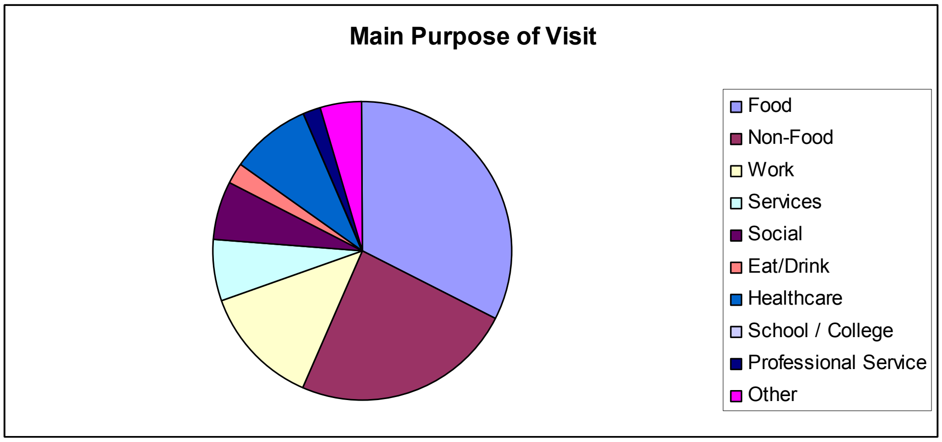
Question 1 – Postcodes

4.214 The respondents to the on-street questionnaires in Berkeley were predominantly from Berkeley and the surrounding villages of Sharpness and Newtown (82%).

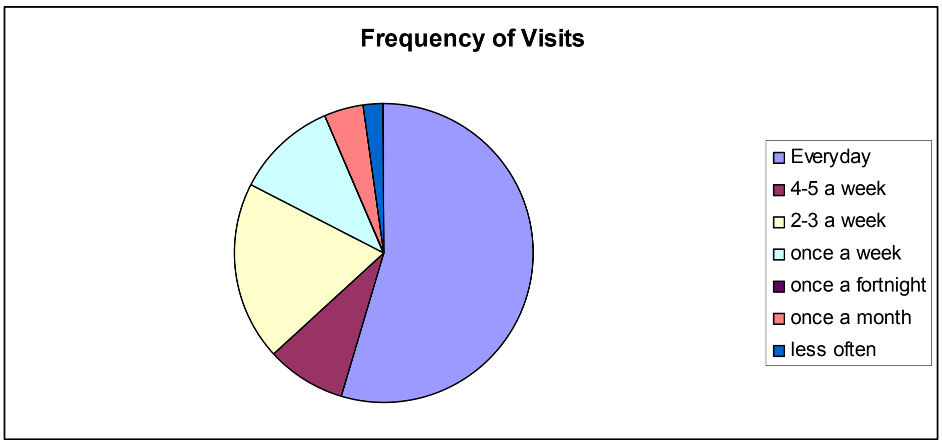
Question 2 – Type of Respondent

4.215 The findings from this question found that 92% of those surveyed were local residents as opposed to a visitor/tourist. However, the proportion of tourist visitors to the town will fluctuate depending on the time of year and which day in the week. The on-street surveys were split between a Tuesday and a Saturday and therefore should have incorporated some of the tourist trade.

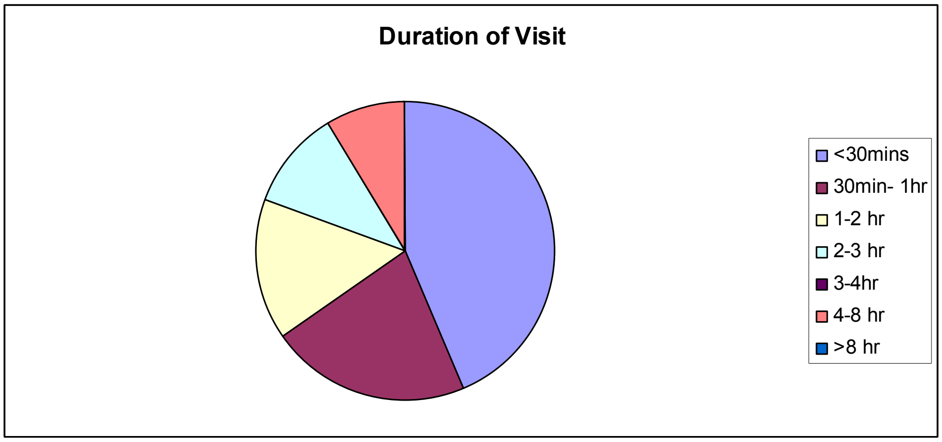
Question 3 – Purpose of Visit



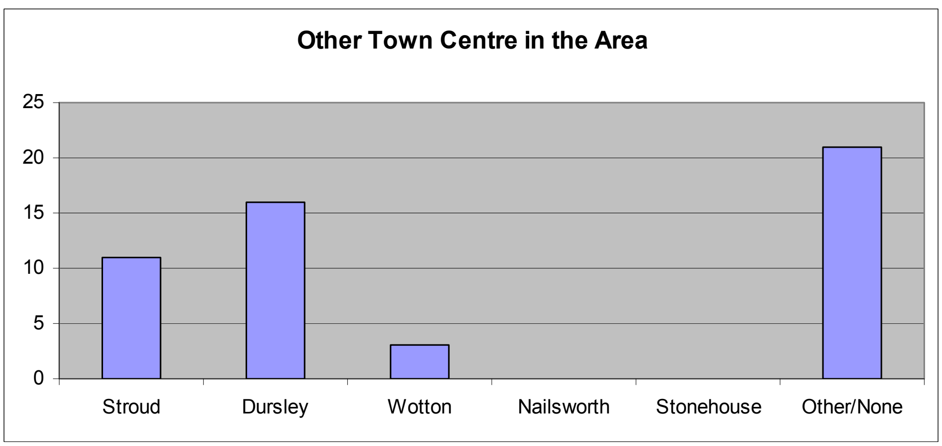
Question 4 - Frequency of Visits to the Town Centre



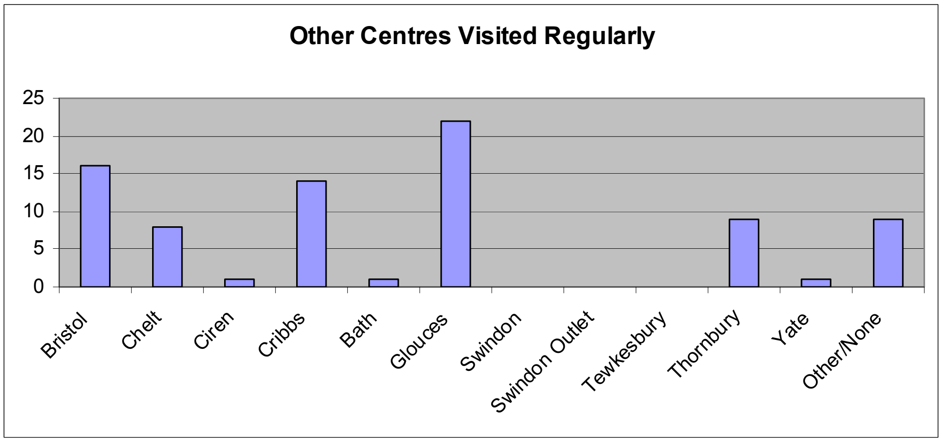
Question 5 – Duration of Stay



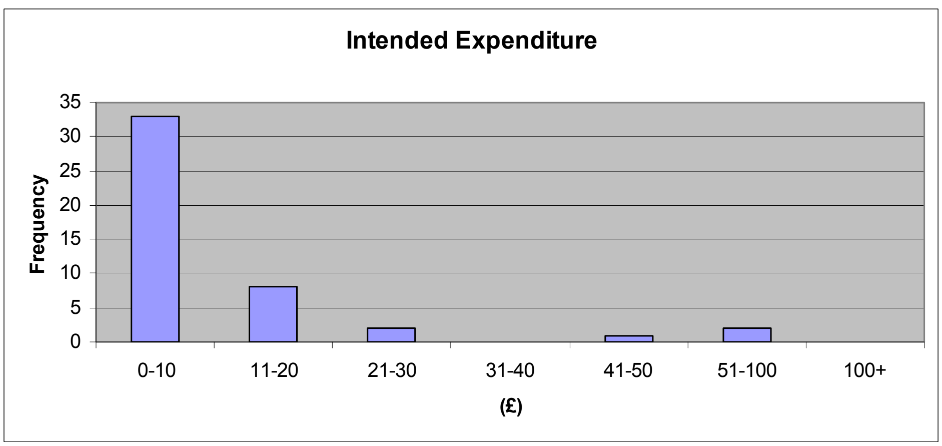
Question 6 – Other Town Centres in the area which are visited regularly



Question 7 – Other Town Centres



Question 8 – Intended Expenditure (£)



Question 9 – View of Retail Provision

4.216 With regards to the provision of non-food shops, there was not a definitive response from those questioned with approximately a third responding to each of 'good', 'average' or 'poor'. This suggests varied perceptions of choice and quality within the town. In terms of food shops, 44% regarded the choice and quality to be 'good'. One potential reason is the independent food retailers within the town. In terms of services (i.e. banks) this was largely a positive response with 41% rating the provision as good. It is not expected that a town centre of this size would accommodate a wide range of services.

4.217 Accessibility by public transport is generally rated as 'poor' (54%) with no respondents viewing its provision as good. Accessibility by car however, is viewed positively (67% 'good').

4.218 Feelings of security / personal safety are generally perceived well with 67% of respondents rating this as 'good'.

Question 10 – Additional Shops and Services

4.219 In terms of additional shops and services, the most popular response was to see a greater choice of clothes / shoe shops within the town. 15% would like to see more food shops.

Question 11 – Views of the Environment

4.220 In terms of overall attractiveness of the town centre, this was not conclusive with 37% rating it as 'good', 41% as average and 15% as 'poor'.

Question 12 – Requested improvements to the town centre environment

4.221 The answers to this question does somewhat contradict the response from Question 11 as 52% do not believe that any improvements are required. It was suggested by 13% of those questioned that more planting would improve the environment.

Question 13 & 14: Evening Economy

4.222 This was split evenly between those who do visit the town centre at night and those who do not. For those that do visit, the predominant reasons are to either socialise (56.5%) and/or to visit places to eat / drink (44%).

Question 17 & 18 – Transport and Parking

4.223 The most popular method for those accessing the town centre in the survey was to drive their own car (50%) followed by walking (41%). Only 2% travelled in by bus.

4.224 Of those travelling by car, 72% parked on-street as oppose to using public car parks. However, those who did drive to the centre generally rated the provision of on-street parking as poor (52%). Only 32% of those questioned would consider using alternative means of transport to the private car. More frequent bus services, more bus stops and to a lesser extent, better footpaths, new bus services and cheaper buses would encourage participants to use public transport or walk/cycle.

Question 22 – Visitors

4.225 The most popular reason for visitors to the town who did not regard it as their local centre was to visit family and friends (75%). The remainder were visiting for work purposes. Therefore, it would suggest that at the time of the on-street surveys (November) there was little tourist trade for those visiting either attractions or events.

State of Town Centre Environmental Quality

4.226 The town centre accommodates a number of listed buildings and is situated wholly within a designated Conservation Area. Therefore, there is limited scope for major redevelopment proposals as the Local Plan and national planning policies seek to preserve or enhance the historic character of conservation areas.

4.227 The on-street survey suggested scope for additional planting in the town to enhance the environment. There is on-street parking in the town centre which is utilised by shoppers.

Conclusion

4.228 Berkeley is a small centre which seeks to cater for its residents and tourists. The survey of town centre uses identified a higher than average vacancy rate which would suggest the centre is underperforming. Those that regularly use the centre do so for largely comparison and/or convenience goods. For those travelling to other centres, the most popular destinations include Dursley, Gloucester and Bristol. It was noted that the town does have a relatively strong evening economy with half of those questioned visiting the town centre at night.

4.229 The on-street surveys identified an under provision of public transport linking the town with nearby villages and sub-regional centres. Improvement in bus services was identified as a means to encourage further use of public transport.

Minchinhampton Town Centre

Structure of the Town Centre

4.230 Minchinhampton is a small town located on a hilltop approximately 4 miles south east of Stroud and 8 miles from Junction 13 of the M5. The town is wholly located within the Cotswold AONB. Many of the buildings in the town date from the 17th and 18th Centuries and a large proportion of the buildings within the town centre are listed. The town accommodates a market every Thursday at the Market House.

4.231 The Stroud District Local Plan defines the town centre as the High Street, the far western end of Tetbury Street and the eastern section of West End. The town centre is situated both within a defined Conservation Area and within the Cotswold AONB.

Diversity of Uses

4.232 Information on the diversity of uses within the town centre boundary has been collected by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table L: Retail Composition of Minchinhampton town centre, 2009

Sector	2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%		
Convenience	3	18.8	11.87	9.5
Comparison	5	31.3	51.48	43.2
Service	6	37.5	21.83	34.0
Vacant	1	6.3	13.47	12.0
Miscellaneous	1	6.3	1.34	1.2
Total	**16**	**100**	**100**	**100**

Source: GVA Grimley surveys (2009)

4.233 Without 2006 data, comparisons can not be drawn over time. When reviewing against the UK and GMT averages, it would suggest a potential under provision of comparison uses and higher than average amount of convenience uses within the town centre, although due to the size of Minchinhampton comparisons with the GMT and national averages should be treated with caution.

Retailer Representation

4.234 There are no multiple retailers within the convenience sector in the town. With regards to the comparison sector, there is a Boots chemist.

Performance of the Town – Rents and Yields

4.235 Information on rents and yields is only available for Stroud Town Centre and therefore this report cannot analyse the performance of the town based on these elements.

Proportion of Vacant Street Level Property

4.236 The 2009 survey identified one vacant unit which, on face value, would suggests a well performing centre for a settlement of this size. However, it should be noted that Minchinhampton (along with towns such as Painswick) faces pressure for change of use of commercial premises to residential use.

Accessibility

4.237 Minchinhampton is situated approximately 4 miles from Stroud and 1.5 miles from Nailsworth. There is an off-street car park at Friday Street which provides a small number of spaces, although it would appear that most visitors to the centre park on street which can cause congestion in the main retail area, particularly as some on street parking occurs outside of authorised areas.

4.238 The nearest train station to Minchinhampton is at Stroud. With regards to bus services, there are daily services to Stroud, Dursley, Cirencester, Tetbury and Yate.

4.239 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Three survey locations were adopted and the southern end of High Street was found to be the busiest location followed by Market Street and then West End.

Stakeholder Engagement

4.240 A stakeholder meeting with local traders and a representative from the Parish Council was held at the Parish Council Offices on the 18th November 2009 (refer to Appendix P for the minutes). The main issues identified include:

- *Issue of unauthorised parking within the town centre and lack of dedicated parking provision*
- *Limited signage to the town centre from Minchinhampton Common*
- *Perceived lack of a generalised retail offer which if provided may incentivise people to visit the centre*
- *Leaking of shopping trips to Nailsworth – enhanced by bus services*

- *Perception of fear of crime especially around the Market House*

State of Town Centre Environmental Quality

4.241 The town centre has a significant proportion of historic and listed buildings as well as being situated within a defined Conservation Area. Therefore, there is limited scope for radical redevelopment proposals.

4.242 A useful source of information in assessing the current state of the town centre environmental quality, as well as opportunities for future enhancement is the Minchinhampton Parish Plan 2005 which was developed by the Parish Council. Consultation with the residents of the town identified the following issues / solutions:

- Additional parking spaces at the top of Bell Lane
- Widening of pavement on Butt Street
- Time limits for parking in Market Square
- Improved public transport links
- Preserve green areas and develop on brownfield sites
- Additional police presence.

Summary

4.243 Overall, Minchinhampton is a small and attractive town centre, which caters primarily for local residents plus visitors to the local area from further afield. The centre has a limited range of retail and service uses, particularly comparison uses, although vacant commercial units in the centre are low.

Painswick Town Centre

Structure of the Town Centre

4.244 Painswick is a small town situated within the Cotswold AONB and is approximately 3.5 miles to the north of Stroud. The A46 runs through the town which leads to Cheltenham, approximately 8.5 miles to the north east. The B4073 from Painswick provides a link to Gloucester (6 miles to the north west).

4.245 The town centre itself is centred on New Street, Bisley Street, St. Mary's Street and Victoria Street. St Mary's Church, a prominent historic building within the town and popular tourist attraction due to its Yew trees, adjoins the town centre to the south. Painswick enjoys the branding of "Queen of the Cotswolds" and is located on the Cotswold Way. Proximity to a key tourist attraction of the Rococco Gardens and availability of high quality restaurants and accommodation reinforce the town as a tourist destination. Due to the scale of the town centre, a Primary Shopping Frontage is not identified in the Local Plan, rather Policy SH9 applies to the entirety of the defined centre. The town centre lies wholly within a defined conservation area. The Local Plan does not identify any proposed redevelopment opportunities within or adjoining the town centre. The recent closure of the library and Tourist Information Office may have an effect on future provision of the services and overall offer of the town.

Diversity of Uses

4.246 Information on the diversity of uses within the town centre boundary has been collected by GVA Grimley in October / November 2009. This information indicates the composition of centre as follows:

Table M: Retail composition of Painswick town centre, 2009

Sector	2009		Selected 'Gloucestershire Market Town' Average %	UK Average (2008) %
	No	%		
Convenience	2	13.3	11.87	9.5
Comparison	6	40	51.48	43.2
Service	4	26.7	21.83	34.0
Vacant	2	13.3	13.47	12.0
Miscellaneous	1	6.7	1.34	1.2
Total	**15**	**100**	**100**	**100**

Source: GVA Grimley surveys (2009)

4.247 Without 2006 data, comparisons cannot be drawn over time. When reviewing existing uses against the UK and GMT averages, the land use composition of Painswick's centre suggest a higher than average provision of convenience uses but (slightly) lower than average levels of comparison and service retail uses.

Retailer Representation

4.248 The only multiple retailer within the town is that represented by Londis in the convenience sector.

Performance of the Town – Rents and Yields

4.249 Information on rents and yields is only available for Stroud Town Centre and therefore this report cannot analyse the performance of the town based on these elements.

Proportion of Vacant Street Level Property

4.250 The 2009 survey identified two vacant units within the centre. This indicates a proportion of vacancies in line with the UK and the GMT averages, although a strict comparison should not be made given the size and role of Painswick and the pressures that it faces for conversion of commercial properties to residential use.

Accessibility

4.251 Painswick is situated approximately 3.5 miles north of Stroud, 8.5 miles south west of Cheltenham and 6 miles south east of Gloucester. The A46 is the main route running through the town. In terms of car parking, there is a 'pay and display' car park at Stamages Lane (62 spaces) as well as some on street parking.

4.252 The nearest train station to Painswick is at Stroud. With regards to bus services, there are daily services to Cheltenham, Stroud and Nailsworth.

4.253 At the time of updating the land use information in the town centre, pedestrian flow counts were undertaken. Counts were undertaken in the morning and afternoon and a summary of the pedestrian flow count data is contained at Appendix W to this report. AM and PM counts have been undertaken and an average of these enables a ranking of locations throughout the town centre to be provided. Pedestrian flow data was obtained for four locations and the New Street/Victoria Street and Victoria Street/St Marys Street junctions were found to be the busiest locations.

Stakeholder Engagement

4.254 A stakeholder meeting with local traders and businesses was held at Painswick Town Hall on the 8th December 2009 (refer to Appendix O for the minutes). The main issues identified include:

- *High cost of property could restrict businesses from operating from the town. Pressure for existing shops and business accommodation to change to residential use.*
- *Need for new modern retail and commercial units within the town (e.g. Old Library site)*
- *Potential for a farmers market*

- *Concern expressed over the signage to the town centre and ability to encourage passers-by to stop*
- *Shortage of public transport*
- *Constraints of listed buildings in terms of expanding retail units.*

State of Town Centre Environmental Quality

4.255 The town centre is situated within a defined conservation area and hosts a number of notable historic buildings constructed in pale grey limestone. The relatively small number of retail units are designed to meet local needs and cater for the needs of tourists. The town centre itself is situated around historic streets and there is limited scope or need for comprehensive refurbishment proposals.

Summary

4.256 Painswick is a historic town centre with a significant number of listed buildings in addition to its inclusion within a defined conservation area. The retail uses that exist within the town cater for limited daily needs of its residents with a small element of top-up provision. The comparison retail units are typically aimed at visitors with a niche offer of antiques and gifts. There is limited scope or need for environmental improvements to the centre.

5. ASSESSMENT OF NEED FOR RETAIL FLOORSPACE IN STROUD DISTRICT

Introduction

5.1 As Policies EC1 and EC3 of PPS4 make clear an up-to-date assessment of the need for additional or replacement floor space to accommodate retail uses is an integral part of the evidence base to underpin policy making at the local level. When assessing the need for retail development, Policy EC1.4 of PPS4 asks that local authorities should take account of both the quantitative and qualitative needs for additional floor space, both of which have a role to play in reaching an overall judgment of the scale and form of development which should be planned and facilitated through development plans. These assessments of need can be summarised as follows:

- Quantitative need is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity or quantitative need can arise as a result of forecast expenditure growth (through population growth or increases in spending) or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
- Qualitative need on the other hand includes more subjective measures. These include for example consumer choice, the appropriate distribution of facilities and the need of those living in deprived areas. Overtrading is also identified as a measure of qualitative need although evidence of significant overcrowding etc may also be an indicator of quantitative need.

5.2 This section of the retail study assesses quantitative and qualitative needs across the different parts of Stroud District. Quantitative and qualitative factors are considered in terms of both convenience and comparison goods retail provision and within each of the main settlements within Stroud District.

Quantitative Need

5.3 In this section we establish the current performance of town centre and out of centre retail provision in Stroud District as the basis for a comparison of existing retail supply with demand and an assessment of the future capacity for retail floor space across the District.

5.4 In order to quantify retail need across Stroud District we have used a conventional and widely accepted step-by-step methodology which draws upon the results of the Stroud Household Survey of existing shopping patterns to model the existing flow of expenditure across the District and beyond. In the analysis which follows we have used the following step-by-step approach.

- Step 1: Definition of an appropriate geographical area of analysis for the quantitative assessment, hereafter known as the study area.
- Step 2: Calculate the current (2010) population and expenditure available within the study area as the base from which to forecast future population and expenditure growth over a specific period. In this instance we have used the period up to 2026.
- Step 3: Calculate the levels of convenience and comparison expenditure flow into stores and centres within Stroud District using a market share analysis based on the results of the Stroud Household Survey.
- Step 4: In order to assess the quantitative need for additional retail floor space, we have used a market share approach. This involves the assumption that retail floor space within the main towns in Stroud District will achieve a particular market share of available retail expenditure within the study area as a whole. This assessment is able to model changing forms of retail provision, including possible increases within or decreases in trade following the implementation of committed retail schemes.

5.5 In the analysis which follows we have adopted the following assumptions and data sources:

- All monetary values have been indexed to 2007 prices.
- Having regard to best practice, the assessment has been carried out on a goods basis, rather than a business basis.
- Data on current shopping patterns has been derived from the Stroud Household Survey 2009 (contained at Appendix B).
- The study area for the assessment has been set to match the Stroud Household Survey Area. However a small allowance has also been made for net inflow of expenditure into the study area which is described in more detail later in this section.
- Population for the study area and its constituent zones have been derived from Experian Business Strategies (EBS) data, which is based on the results of the 2001 census and projected forward using data provided by the Office of National Statistics (ONS) and Stroud District Council. A number of different population growth scenarios have been tested for Stroud District and these are outlined later in this section.

- Per capita retail expenditure for convenience and comparison goods have been derived from EBS data and projected forward using information within the EBS publication Retail Planner Briefing Note 7.1 (August 2009). The base data from EBS provides the expenditure based on local circumstances and local socio-economic characteristics. Account has also been taken of special forms of trading in the survey area and expenditure estimates. The special forms of trading sector includes sale through mail order companies, sales from the internet, market stalls and sales direct from the producer and manufacturer and our allowance for this type of shopping takes account of likely increases in this sector over the lifetime of the assessment. The proportion of expenditure attributed to special forms of trading is outlined in the notes to Table 2 in the various quantitative analyses, along with the expenditure growth forecasts for convenience and comparison shopping.
- When comparing existing retail supply with demand in Stroud District reference has been made to company average sales density figures for the convenience goods retail sector. These sales density figures are the average amount of retail sales (expressed in pounds sterling) which is attracted to each square metre of a retailer's national floorspace portfolio. In other words, a simplistic explanation of this is if a retailer has an annual convenience (food) goods turnover of £10million and it has 2,000sq m of net sales area for convenience goods, then its average sales density is £5,000/sq m (£10m divided by 2,000sq m). This data has been obtained from research documents published by Verdict and Mintel.
- The quantitative assessment examines retail capacity over the period 2010 to 2026 including interim projections at 2015 and 2021.

5.6 As already noted the study area which has been adopted for this quantitative assessment matches the area covered by the Stroud Household survey including the 12 survey zones which cover Stroud District and parts of the surrounding administrative areas. The survey area and zones are shown on the plan attached at Appendix A. As already noted in this report the survey area and its constituent zones have been organised to allow each of the main Stroud District settlements to be contained within an individual zone in order that shopping patterns associated with individual settlements can be regularly identified.

5.7 The survey results identify shopping patterns for both convenience and comparison goods and this data has been fed into our quantitative assessments in order to inform the distribution of market shares across the district. Where necessary the survey results have been re-based to remove responses such as internet or mail order shopping. For convenience goods the household survey includes questions on main food and top-up food shopping, in order that the assessment takes into account different patterns of usage of existing stores within each settlement. The survey also includes data on seven types of comparison goods shopping including:

- Clothing, footwear and other fashion goods.
- Furniture floor coverings and textiles.
- DIY and hardware products.
- Domestic appliances.
- Smaller electrical products.
- Personal and luxury goods.
- Recreational goods.

5.8 The starting point for the quantitative assessment is the level of existing and future population within each of the 12 survey zones. Data on population levels within each of the postcode sector areas which form each zone have been obtained from EBS for the current year (2010). In order to assess population levels and trends within each survey area the following information and assumptions have been adopted:

- Zones 1-5, 7, 9-11 of the study area broadly fall within the Stroud District Administrative boundary, although part of Zone 10 also falls within the Tewkesbury Borough area. Data from the ONS 2006 Sub-National Population projections has been obtained for Stroud District and which indicates an average annual increase of 850 persons per annum between 2010 and 2026. This growth rate has been applied to those zones falling within the Stroud District area with the remaining zones relying upon population projections from EBS.
- Once the District Wide population growth rate has been set we have then considered how the growth should be apportioned between those zones falling within Stroud District. Using data on housing completions and housing commitments from Stroud District Council, along with the spatial options for future house building in the district, as outlined in the recent core strategy document, we have split the global growth rate between individual zones.
- Whilst data on housing completions and housing commitments is fixed, there are a number of different options for future house building across Stroud District and these have been outlined in the recent Stroud District Council Core Strategy ‘Alternative Strategies’ consultation document (February 2010). This document is in part influenced by the contents of the draft RSS which, in addition to the planned urban extension at Hunts Grove, identifies a further urban expansion to the south-eastern side of Gloucester

(1,500 additional units). Like the Alternative Strategies consultation document our analysis of population growth options includes this urban extension as a consistent factor. The remainder of the district's housing growth, circa 2,000 additional units, has been placed across the survey zones in a manner which reflects the spatial options which are outlined in the Alternative Strategies consultation document. However, it should be noted that immediately prior to the finalization of this document, the new Coalition Government signalled its intention to bring forward legislation to abolish Regional Spatial Strategy documents and therefore the population growth and distribution figures in this document may need revising when further versions of the Stroud District Council Core Strategy are published.

- A summary of the population growth options for the district can be found at Appendix D.
- Within the following paragraphs we set out the current pattern of shopping and expenditure flows across Stroud District and, because our population growth scenarios will only be affected by future house building, the current (2010) situation will be a consistent element whichever spatial growth scenario is taken. Later in this chapter we set out what effect the different population growth scenarios will have upon the level of retail expenditure which could flow to settlements within Stroud district.
- The various quantitative scenarios are contained at Appendices E to N at the rear of this report and are summarised later in this chapter.

5.9 In table 2 (in all the quantitative assessments contained in appendices to this report (Appendices E – N)), the per capita expenditure figures obtained from EBS are broken down into convenience and the various sub-categories of comparison goods shopping. For each goods category account has been taken of special forms of trading (internet, catalogue and mail order shopping) and future growth in expenditure (per annum), both of which are derived from the latest guidance published by EBS in August 2009. It should be noted that expenditure growth projections for the longer term should be treated with a degree of caution, given the forecasting period involved. Indeed it would be appropriate in any event to review these expenditure figures as part of a wider review of the retail study at regular intervals (eg every five years).

5.10 By combining the population and per capita expenditure rates tables 3A to 3H (in Appendices E – N) set out the total retail expenditure within each of the study area zones by goods type. Table 3A indicates that convenience retail expenditure within the study area is expected to grow by £75 million over the period 2010 to 2026 and an increase of £20 million over the next five years. Between 2010 and 2026 comparison goods expenditure in the study area will grow by £320 million from the current level of £520million at 2010 to £840 million by 2026.

Current expenditure flows

5.11 The next stage of the quantitative assessment is to estimate current flows of retail expenditure within and surrounding Stroud District. Separate flows for main food and top-up food expenditure are provided and seven sub-categories of comparison goods expenditure have also been examined (to match the questions used within the Stroud Household Survey).

5.12 Tables 4A and 4B (in all of the quantitative assessment appendices (E – N)) set out the current market share of convenience shopping facilities within Stroud District for main and top-up food shopping. For the main shopping destinations, market shares are shown for each of the 12 survey zones in order to show the popularity of each destination across different parts of the district. The market shares within tables 4A and 4B are then applied to the total available convenience goods expenditure within each zone to derive the amount of money which each destination is attracting from different parts of the study area. In order to gain an accurate estimate of expenditure flows, the proportion of total convenience goods expenditure through the main and top-up food destinations has been weighted to take account of the amount of household expenditure which is spent on main food shopping as opposed to top-up food shopping.

5.13 Tables 5A and 5B (in all of the quantitative assessment appendices(E – N)) provide the following information regarding flows of convenience goods expenditure at 2010 in and around the main settlements in Stroud District (the figures given below are turnover levels derived from the study area and further allowance may need to be made in order to estimate the total turnover of individual centres/ stores where they also attract expenditure from beyond the study area (see later in this section for further information on our estimates of expenditure inflow):

- Stroud attracts £93 million of convenience goods expenditure from the study area around half of which is drawn from the immediate local area (Zone 1). 87% of main food shopping trips from the local area remain in the town with small levels of leakage flowing to Nailsworth (Morrisons 5%) and stores outside the district (5%). Three quarters (77%) of top-up food shopping trips are also retained within Stroud with a small level of leakage to Cam (1%) Nailsworth (12%) and stores outside the district (4%). In addition to their popularity amongst local Stroud residents, convenience stores in Stroud are also very popular across other parts of the district. For example, over half (58%) of main food shopping trips from Stonehouse, 80% of trips from Zone 3 (Painswick), 78% of trips from the Chalford area, 52% of trips from Minchinhampton and 36% of trips from Nailsworth all flow to Stroud. In addition significant levels of top-up food trips from these areas also flow to Stroud. The survey results indicate that the Tesco store in Stroud attracts £32.8 million of expenditure from the study area, with the Sainsbury's store attracting £26 million and the Waitrose store attracting £18 million. Within the town centre, the Iceland store is assessed to attract £3.9 million, whilst the Co-Op store at Cashes Green attracts £3.4 million. The remaining expenditure flowing to Stroud goes to the Co-Op on Slad Road (£1.5 million) and other smaller stores, the majority of which will be in the town centre, (£7.7 million).

- The Tesco store in Cam is predicted to have a study area derived turnover of £25.8 million, the majority of which is attracted from Zone 11 of the study area (which covers Cam and Dursley). The Tesco store also attracts expenditure form Zone 9 (Berkeley) and other western parts of the district adjacent to the River Severn.
- Within Dursley, tables 5A and 5B indicate that £8.2 million is flowing to the convenience retail offer at the time of the survey (i.e. pre-Sainsburys) including £4.1 million to the former Somerfield store in the town centre and smaller levels of turnover for the Co-op on Rosebery Road (£1 million) and the Lidl on Kings Hill Road (£0.7 million) and other smaller stores (£2.3 million). Some caution may need to be taken when using these figures given that the Lidl store has only recently commenced trading and the significant road works within Dursley Town Centre (as part of the construction of the new Sainsbury's store) may have affected short term shopping patterns.
- Wotton-under-Edge is assessed to have attracted £10.3 million of convenience goods expenditure from the study area, the majority of this turnover is shown to be flowing to the Co-op store in the town centre (£7.3 million). The majority of Wotton's trade is attracted from the local area (Zone 7 of the study area) and the survey results indicate that the town is able to retain 46% of main food shopping trips and 84% of top-up food shopping trips. Wotton's influence on shopping patterns does not extend to any great extent beyond Zone 7 apart from attracting around one third of top-up food shopping trips from Zone 8 to the south and west.
- Nailsworth is predicted to attract £17.5 million of convenience goods expenditure, the majority of which is flowing to the Morrison's store (£12 million). Smaller turnover levels are predicted for the Co-op and Tesco Express stores, plus other small scale provision within the town centre. Stores in Nailsworth attract just over half of main food shopping trips from the local area (Zone 5) and 86% of top-up food shopping trips. Beyond this core catchment, Nailsworth influence is relatively limited, apart from attracting 28% of main food trips from the Minchinhampton zone (Zone 4B) and 10% of top-up shopping trips from the Chalford zone (Zone 4A).
- Stores in Stonehouse are predicted to attract £10 million of convenience goods expenditure from the study area, split between £4 million of main food expenditure and £6 million of top-up food expenditure. 21% of main food shopping trips generated by

Stonehouse residents (Zone 2) remain within the local area, whilst the retention of top-up shopping trips is higher at 56%. Beyond this area, Stonehouse's influence is limited to small levels of main food expenditure attracted from Zone 9 (Berkeley) and small levels of top-up food shopping trips from Zones 1, 3, 5, 6 and 10. Just under half of all convenience expenditure flowing to Stonehouse is attracted by the Co-op on High Street (£4.7 million).

- £3.6 million of convenience expenditure is, according to tables 5A and 5B, flowing to stores in Berkeley. The majority of this expenditure is top-up food shopping trips from the local area (Zone 9). Similar patterns of shopping are also found in relation to Minchinhampton, Painswick and Chalford where relatively low levels of turnover are found and which is clearly orientated towards top-up food shopping.

5.14 In relation to comparison goods shopping habits, those parts of tables 6-12 (in all of the quantitative assessment appendices (E – N)) which relate to 2010 set out market penetration rates of existing facilities by individual types of comparison goods. Each of these tables converts the existing market penetration rate into levels of expenditure flowing to each centre. Using the results of the Stroud Household survey flows of expenditure within the clothes and shoes, furniture and carpets, electrical, DIY, personal and luxury and recreational goods categories have been examined. We have examined individual types of comparison goods shopping in order to ensure that particular nuances of shopping patterns in and around the individual towns are fully incorporated into the quantitative assessment. For example the different towns within the district are likely to possess differing roles depending on a number of factors, including; their size, geographical position in relation to other settlements, their influence from tourism and their current size of retail offer.

5.15 Tables 6 to 12 provides a study area derived comparison goods expenditure total for each of the main towns in Stroud District and the data for each settlement can be summarised as follows:

- Stroud attracts around £92 million of comparison goods expenditure from the study area which equates to a 47% market share across this geographical area. This total level of expenditure comprises £10.7 million on clothes and shoes, £5.1 million on furniture and floor coverings and household textiles, £27.2 million on DIY goods, £2.3 million on domestic appliances, £6.5 million on smaller electrical goods, £22 million on personal and luxury goods and £18.2 million on recreational goods. The comparison goods turnover of Stroud is the largest within the District by some considerable margin. Town centre and out of centre facilities attract shopping trips from a wide geographical area, although the core catchment comprises Zones 1-5. Elsewhere in the District, Stroud is also a popular shopping destination, although its market share falls as it struggles to compete with Gloucester and Cheltenham to the north, Cirencester to the east and Bristol to the south.

- The centre with the second highest financial performance within the study area is Stonehouse at £9.8 million. Stonehouse attracts expenditure across a number of goods categories, although the survey indicates that it is particularly popular for electrical goods which attracts trips from outside of its main core catchment area (Zone 2). The other goods categories which attract trips from beyond the Stonehouse area include recreational goods and furniture, floor coverings and textile goods.
- Nailsworth has a non-food goods turnover of £6.9 million. One third of this turnover derives from personal and luxury goods although expenditure is also attracted for clothes, furniture, DIY and recreation goods. Nailsworth attracts relatively little expenditure on electrical items. Whilst it has the third highest turnover of the district's settlements, Nailsworth has a catchment which extends beyond the local area (Zone 5) and is also able to attract shopping trips from Minchinhampton, Chalford, Wotton and (to a lesser extent) Stroud.
- Dursley attracts £6.2 million of comparison goods expenditure, the majority of which is attracted from the local area (Zone 11). The town has low levels of market share within the clothes and shoes and recreational goods categories, although performs better within the DIY and electrical goods categories.
- Wotton under Edge has a similar turnover to Dursley and attracts £5.9 million of comparison goods expenditure. One third of the town's turnover derives from the personal and luxury goods sector and 40% of all trips for this type of shopping in the local area are retained within the town. For a town of this size, reasonable levels of shopping trips associated with clothes, furniture/ floor coverings/ household textiles and recreational goods are also retained, although low levels of retention are found in relation to electrical items.
- Minchinhampton attracts £2.2 million of comparison goods expenditure from a core catchment area which does not extend beyond the local area (Zone 4B of the survey area). Like other towns a significant element of the turnover is accounted for within the personal and luxury goods sector, although Minchinhampton is also attracting expenditure within the small electrical goods and recreational goods categories.
- £2.1 million of expenditure is assessed to be flowing to Berkeley with DIY and hardware goods comprising the most popular sector, alongside personal and luxury goods. The majority of expenditure flowing to Berkeley is from Zone 9 (the zone in which Berkeley sits) although small amounts of expenditure are attracted from the surrounding study area zones.

Comparing Existing Supply with Demand

5.16 Following the establishment of current convenience and comparison turnover levels within each settlement our quantitative assessment can move forward to the assessment of future capacity. Having established the current turnover of existing facilities it is important to assess whether these levels represent a reasonable base line for forecasting purposes. Consideration should be given as to whether existing facilities are trading broadly in line with acceptable levels or whether there is evidence that facilities are either underperforming or trading at such high levels that over trading is occurring.

5.17 For the purposes of this capacity exercise we have compared the turnover levels of the main food stores against their respective company average benchmark levels and for other smaller scale convenience floorspace we have calculated their trading performance in £/sq m (by dividing their total turnover by existing net sales floorspace. For comparison goods retailing, comparison against an accepted or baseline benchmark is much more difficult for a number of reasons. First, in towns where there is both in-centre and out-of-centre provision, the household survey question may not accurately distinguish between all trips to these destinations. Second, there is little accurate data on net sales floorspace across all of Stroud's centres and out of centre provision. Therefore, when assessing future capacity across Stroud's town centres we have had regard to other factors such as the results of the town centre health checks and the household survey results.

5.18 Having regard to the main foodstores across the District, Table A below outlines the current performance of stores against company average benchmark levels

Table N: Performance of main convenience stores, 2010

Store	Total Turnover (£m)	Company Average Benchmark (£m)
Sainsbury's, Stroud	£27.9m	£22.8m
Tesco, Stroud	£35.2m	£30.4m
Waitrose, Stroud	£19.6m	£24.2m
Iceland, Stroud	£4.2m	£2.9m
Co-op, Cashes Green, Stroud	£3.6m	£6.7m
Somerfield, Dursley	£4.4m	£3.1m
Morrisons, Nailsworth	£12.9m	£12.0m
Co-op, Stonehouse	£5.0m	£6.7m
Tesco, Cam	£27.7m	£16.8m

Source: Appendices E-N

5.19 The above analysis indicates that the Sainsbury's and Tesco stores in Stroud are trading at levels above their respective company average levels, although not dramatically so. However, the Waitrose store on the edge of the town centre and the Co-op store at Cashes Green are assessed to trade below company average levels. Elsewhere in the town, the Iceland store in the town centre is also, according to the household survey results, trading well and above company average levels. In terms of other smaller scale provision, the majority of which will be in Stroud town centre, this is assessed to have a sales density of circa £5,200/sq m. However, this is based upon existing physical floorspace provision and an allowance should also be made for the effect which the regular farmers market has upon the trading performance of the town. Therefore, the sales density performance of other convenience floorspace in the town is considered to be modest and does not, in our opinion, significantly over-perform.

5.20 Within Cam and Dursley, our quantitative analysis indicates that both the former Somerfield store (being refurbished as an Iceland store) in Dursley town centre and the Tesco in Cam trade at levels above their respective company averages. This is particularly the case for the Tesco store which could be as much as 60% above average. These trading levels are unsurprising, given the dominant position that Tesco holds in terms of main/bulk food shopping in the Dursley/Cam area and Somerfield being the largest (and most central) food shopping facility in Dursley (when it was trading as such). These levels of trading performance are likely to be reduced as a result of the new Sainsbury's store in Dursley and we do not consider that there will be a need to make an allowance for overtrading within Cam/Dursley within the quantitative assessment (following the introduction of the Sainsbury's). This position is reinforced by the modest trading levels associated with the Co-op store on Roseberry Road and the Lidl on Kingshill Road and the sales density of other floorspace in Dursley of circa £5,000/sq m.

5.21 Within Wotton-under-Edge, our quantitative analysis suggests that the Co-op store is trading very well and well beyond Co-op's average trading density level. Elsewhere in the town centre, other convenience facilities (including the Tesco Express) are trading at more modest levels. From experience, the Co-op store holds a dominant position within Wotton and is a very popular shopping destination. The levels of customers which visit the store broadly justify the results of the quantitative analysis and the likelihood that the store is over-trading.

5.22 The Morrisons in Nailsworth is, according to the quantitative analysis, trading at levels commensurate with its company benchmark level. The smaller Co-op and Tesco Express store also trade at modest levels, although above their respective company average levels, whilst other convenience floorspace in the town has a sales density of £2,300/sq m. The trading performance of these 'other' stores does appear to be quite low given the overall performance of Nailsworth and it may be that the household survey underpinning this analysis has slightly under-estimated the performance of these stores (at the same time as slightly over-estimating the performance of national multiple stores).

5.23 Stores in the Stonehouse area are, based on the quantitative assessment, observed to trade at modest levels. Collectively, the three Co-op stores in the local area trade at similar levels to the Co-op average trading density, although the survey data may have under-estimated the market share of the larger Co-op store on High Street in Stonehouse and over-estimated the market share of the Co-op in Eastington (given the relative size of these stores). For smaller independent convenience stores, the estimated trading density is circa £4,000/sq m which is not considered to be excessive or representative of over-trading.

5.24 In terms of the smaller centres elsewhere in the District, Berkeley, Painswick, Chalford and Minchinhampton have low levels of convenience goods turnover, which is commensurate with the level of provision in these towns. The trading density of Berkeley stores is circa £10,000/sq m which is considered to be a healthy trading performance and a sign of their popularity despite the small scale of provision. Within the other towns, lower trading densities are observed, none of which are considered to be excessive and/or clear evidence of overtrading.

Assessing Future Capacity

5.25 In simple terms, a comparison between current and forecast turnover levels will give an indication of expenditure 'surplus' or capacity likely to be available within the assessment area during the forecast period. However, when comparing current and forecast turnover levels, account should be taken of an appropriate benchmark turnover level for existing facilities, productivity growth for existing and committed retail facilities and potential changes in market share. In order to illustrate potential quantitative capacity across the main settlements in the District, a statistical assessment is contained within Appendices E to N to this report. Given the size and financial performance of the main settlements in Stroud District, our capacity analysis concentrates upon the five largest urban areas: Stroud, Wotton, Stonehouse, Cam & Dursley and Nailsworth. The smaller towns of Berkeley, Painswick and Minchinhampton have much lower turnover levels and, as a consequence, a detailed assessment of expenditure capacity is not possible.

5.26 Our assessment of future capacity brings together the above factors and forms the basis for assessing whether there is likely to be an identifiable level of capacity for additional provision up to 2026. A common format is adopted for the capacity analysis and shows the following information:

- The total level of available retail expenditure within the study area;
- The level of expenditure which each centre attracts from the study area;
- The market share of each centre within the study area;

- The level of expenditure inflow attracted by each centre;
- The total turnover of convenience and comparison facilities in each centre, which is a combination of residents' spending derived from the study area plus trade inflow from beyond;
- The indicative benchmark turnover of existing retail facilities in each settlement;
- The turnover of commitments for additional retail floorspace;
- A residual expenditure estimate which is the difference between the total expenditure flowing to retail facilities in a particular settlement and their current turnover (taking into account floorspace efficiency increases);
- Within the notes to each of the capacity tables (Tables 14 & 15 at Appendices E –N) explain the process for estimating quantitative capacity in each of the main settlements. In brief, the methodology and format of the capacity tables comprises:

  1. at the top of each table, the total level of available expenditure is provided;
  2. within the next row, the total level of expenditure (which stores in that particular settlement attract from the study area) is shown;
  3. below these rows, a market share for (convenience or comparison) retail stores in that particular settlement is given. This is the total study area turnover of stores in a particular town expressed as a percentage of total available expenditure;
  4. below the study area market share row, the level of expenditure inflow to a particular town (from beyond the study area) is shown. Further information on the calculation of expenditure inflow is contained below;
  5. the study area derived turnover and expenditure inflow rows are then added to together to provide a total turnover potential for each town;
  6. below the total turnover potential, the benchmark turnover of existing stores is shown. The benchmark turnover is then subtracted from the total turnover potential to derive the level of residual expenditure within each goods category for each town. This level of residual expenditure, where a positive value is shown, represents the level of quantitative capacity within a particular town;
  7. finally, the forecast residual expenditure (quantitative capacity) is translated into an indicative floorspace capacity via the use of an indicative sales density for new retail floorspace. Because different types of retail facilities have different levels of sales density performance, particularly different convenience facilities, these floorspace capacity forecasts should be used as a guide only and reference should also be made to financial levels of quantitative capacity;

5.27 As noted at the start of this section, the quantitative assessment has been informed by different scenarios for population growth across individual parts of Stroud District up to 2026. The scenarios which have been presented are based upon the contents of the Council's Core Strategy Alternative Strategies document published in February 2010. Given that there is not yet one single fixed strategy for housing development and population growth across the District, a range of capacity forecasts are presented by this study, which will evolve as the Council moves forward to selecting its preferred options for development across the District.

5.28 In addition to the expenditure from local residents within the study area which is spent at convenience and comparison goods stores in Stroud District, it is likely that people from outside of the study area (e.g. tourists and residents of other parts of Gloucestershire etc) will also spend money at facilities in the District (known as 'expenditure inflow'). For each of the five settlements in the District an allowance has been made of the level of expenditure inflow. These are GVA Grimley estimates having regard to information contained within the 2007 Value of Tourism report published by South West Tourism along with our predictions regarding the amount of expenditure on convenience and comparison goods items and the distribution, type and market share of retail facilities across the District. The amount of expenditure inflow for each of the main five settlements is clearly shown in Tables 14 and 15 (Appendices E – N).

5.29 As a starting point, the following text outlines the appropriate benchmarks and, where applicable, market share assumptions which have been used, as the basis for assessing capacity. This is set out on a settlement-by-settlement basis for both convenience and comparison retailing, followed by future retail capacity implications of the various growth scenarios suggested by the Council Core Strategy Spatial Options paper. The future retail capacity implications are contained within paragraphs 5.39 to 5.49 of this chapter.

Stroud

5.30 Within Stroud, our quantitative assessment has found varying levels of trading performance, with some stores (Tesco, Sainsbury's and Iceland) trading above company average levels and some stores (Waitrose and Co-op) trading below such levels. We have also found that other, smaller scale, convenience floorspace in the town is trading at reasonable levels. Overall, we have reached the view that there is not consistent over-trading across all parts of the convenience retail sector in Stroud. This is supported by the statistical assessment at Table 15a which compares expenditure flowing to convenience stores in Stroud against company average benchmark levels for the main stores (and makes no adjustments to the turnover associated with smaller scale independent stores). It confirms, at 2010, a current broad equilibrium. In other words, the collective level of expenditure flowing to convenience stores in Stroud broadly matches the collective company average levels of those occupiers present. Therefore, we see no reason to allow for any significant levels of over or under-trading (i.e. immediate 2010 quantitative capacity) within the convenience capacity assessment for Stroud.

5.31 Moving forwards across the assessment period, it should also be noted that the introduction of the new Sainsbury's store in Dursley may also have an effect upon the level of expenditure flowing to stores in Stroud. Where more expenditure is retained in Dursley, rather than flowing to Stroud, this could reduce Stroud's market share. Such a phenomenon should be taken into account when interpreting the different future growth scenarios.

5.32 Within the comparison retail sector in Stroud, existing stores are predicted to attract around £92m of expenditure from the study area, which will be boosted by a limited extent by expenditure inflow from outside the study area. As a guide, we have compared this level of turnover against the company average performance levels of out of centre stores such as Focus, Homebase and the non-food element of the town's supermarkets (Tesco, Sainsbury's etc) and a reasonable sales density for town centre floorspace (£4,000/sq m net). The result of this comparison is a broadly comparable situation, with no obvious high trading levels in any part of the comparison sector. Vacant levels within the town centre are slightly below the national average and there is scope for the town centre to attract further operators within its existing floorspace stock.

5.33 As a consequence, we consider that there is not compelling evidence for Stroud's quantitative assessment of comparison shopping to allow for either under or over-trading at the base year of the assessment (2010). In other words, the collective level of expenditure which is flowing to stores in Stroud at 2010 is assumed to represent an appropriate collective benchmark turnover for existing stores. Therefore, there is not assumed to be any existing significant capacity for additional provision although future capacity will arise over the assessment period as a result of population and per capita expenditure growth (whilst taking into account the need to allow existing floorspace to benefit from increases in floorspace efficiency over the assessment period). The level of future comparison goods capacity in Stroud is outlined later in this section.

Cam / Dursley

5.34 Within Cam and Dursley's convenience retail sector, it has already been noted that there is consistent high trading levels within the larger stores and reasonable trading levels across the remainder of the sector. Given the scale of trading levels above company benchmark, plus the qualitative aspects of existing provision, we would endorse the previous identification of a quantitative need for additional provision. This supports the Council's approach within the adopted Local Plan. The approval of the Sainsbury's scheme on the edge of Dursley town centre has now met that identified need and taking the benchmark turnover of that store into account, Table 15b indicates that any previously identified surplus has now been removed. Given that the Sainsbury's store will have a significant influence on local shopping patterns, we have adopted a slightly higher benchmark turnover figure at the base year in order to allow the effects of the Sainsbury's store to settle prior to any further convenience floorspace being provided in the local area.

5.35 Within the comparison retail sector, our quantitative analysis indicates that existing facilities attract around £8.6m of expenditure. On the basis of existing comparison floorspace within Dursley town centre and elsewhere in the urban area this level of expenditure is likely to generate an average trading density of circa £4,000/sq m which is considered to be moderate for the size of this settlement and its trading role and function. As a consequence, we consider that there is not compelling evidence for Stroud's quantitative assessment of comparison shopping to allow for either under or over-trading, although there is a need to allow existing floorspace to benefit from increases in floorspace efficiency over the assessment period.

Nailsworth

5.36 For Nailsworth's convenience sector, we have found that the performance of the Morrisons' store is not too dissimilar to its national average and a moderate trading performance across the remainder of the convenience sector. In addition, our surveys of existing provision have not found any significant problems associated with over-trading and congestion. Therefore, the 2010 situation shown in each version of Table 15c (in Appendices E – N), where there is a small level of capacity, appears to be an appropriate starting point for the analysis. Within the next section of this report, we will take into account the findings of our qualitative and site assessments and consider whether it is appropriate to consider changes to the market share of the convenience sector in Nailsworth to generate further capacity.

Wotton-under-Edge

5.37 In relation to Wotton, the quantitative assessment indicates high trading levels for the town centre, centred primarily on the Co-op store. The statistical evidence of overtrading is supported by observations regarding the popularity and stocking levels at the store. As a consequence, we consider that there is a case for adopting a lower benchmark than current spending levels. This is shown in each version of Table 15d (in all of the quantitative assessment appendices E - N), although for the purposes of this assessment the current (2010) surplus should be seen as a maximum. The appropriateness of raising Wotton's convenience market share to make qualitative improvements will be discussed in the next section.

Stonehouse

5.38 Finally, within the Stonehouse area our quantitative assessment has found that, collectively, stores are trading at reasonable levels and there is no clear evidence of overtrading, either from a statistical point of view or congestion within stores. We therefore consider that an appropriate starting point for the capacity assessment for Stonehouse will be one of broad equilibrium and any further capacity will be generated through increases in population and per capita expenditure, plus consideration of the appropriateness of raising the town's market share.

Assessment of Capacity – Alternative Population Growth Scenarios

5.39 Taking into account the foregoing benchmark analysis and the methodology for the capacity assessment (outlined at paragraph 5.24 above), we have assessed the capacity for additional retail floorspace for each of the five main settlements (Stroud, Nailsworth, Wotton, Cam/Dursley and Stonehouse). In the first instance, our quantitative assessment outlines future capacity based upon the continuation of existing convenience and comparison shopping patterns and applied these to our interpretation of the ten alternative spatial strategies outlined in the February 2010 Stroud District Council Core Strategy Alternative Strategies consultation document. Testing these different growth levels will establish the likely retail floorspace requirements of each scenario and provide the Council with advice on whether its growth scenarios could have markedly different retail floorspace capacity projections.

5.40 Each of the population growth scenarios used for our quantitative assessment is our own interpretation of Strategy Options A-G outlined in the February 2010 Core Strategy document. Due to a number of the Council's Alternative Strategies containing a range of scenarios we have developed our own potential sub-options, which are listed below:

- Strategy Option A – concentrated growth point strategy, with 2,000 dwellings at either Cam, Eastington or west of Stonehouse. Within this option there are effectively two alternative scenarios, which directs growth to either Zone 2 or Zone 11 of the study area. These alternatives are shown in our quantitative scenarios A1 (Appendix E) and A2 (Appendix F).
- Strategy Option B – concentrated development strategy with 1,000 dwellings concentrated at two of the following: Cam, Eastington, west of Stonehouse, Brimscombe & Thrupp or Whitminster. Within this option these are three alternative scenarios which direct growth to a combination of Zones 1, 2 & 11. These are shown in our quantitative scenarios B1 (Appendix G), B2 (Appendix H) & B3 (Appendix I).

- Strategy Option C – cluster strategy, providing 200 to 250 dwellings at 8 settlements boosting local service centres. For this option, we have spread the allocation of 250 units across six of the study area zones (plus 500 units in one zone), to reflect the distribution of growth shown in the Alternative Strategies consultation document. Therefore, we have provided one scenario for this strategy option (Scenario C – Appendix J)
- Strategy Option D – Stroud Valleys strategy. This concentrates residential development within our study area zones 1, 2 and 5 and therefore we have provided one scenario for this strategy option (Scenario D – Appendix K))
- Strategy Option E – town and country combination strategy, including 1000 dwellings at either Cam, Eastington, Brimscombe & Thrupp, west of Stonehouse or Whitminster and at least 10 sites of 100 dwellings or less dispersed across the District. Based on the likely combinations provided by this option, we consider that there are three scenarios to be tested within our quantitative assessment (Scenario E1 – Appendix L; Scenario E2 – Appendix M; Scenario E3 – Appendix N).
- Strategy Options F & G – rural communities and dispersal strategies. We consider that these strategy options are substantially the same as strategy option C (Appendix J) and therefore there is no need to provide any further variations to the quantitative assessment.

5.41 For the avoidance of doubt, this preliminary analysis is only the starting point for the retail strategy for Stroud District and the next section of this document considers, through a policy options analysis, whether Stroud District Council's Local Development Framework should make interventions in the current pattern of shopping trips in order to meet wider planning objectives.

5.42 The results of the convenience floorspace capacity analysis are outlined below. For the avoidance of doubt, it should be noted that the capacity levels outlined below are based upon an indicative trading performance of £10,000/sq m net (and benefiting from increasing floorspace efficiency in line with existing floorspace) which is generally reflective of the performance of the larger grocery supermarket retailers.

Table O: Convenience goods floorspace capacity analysis for the main towns (continuation of existing shopping patterns)

Centre / Scenario		2015 (sq m net)	2021 (sq m net)	2026 (sq m net)
Stroud				
	A1	543	1069	1447
	A2	452	863	1143
	B1	583	1159	1579
	B2	537	1056	1427
	B3	498	966	1295
	C	499	970	1301
	D	564	1115	1514
	E1	484	937	1251
	E2	570	1129	1535
	E3	530	1040	1403
Nailsworth				
	A1	350	446	514
	A2	347	438	503
	B1	356	459	534
	B2	354	455	528
	B3	349	442	508
	C	350	445	513
	D	390	535	646
	E1	359	466	543
	E2	367	483	568
	E3	361	469	549
Wotton				
	A1	588	645	688
	A2	590	650	696
	B1	588	645	688
	B2	589	648	692
	B3	589	648	692
	C	604	682	742
	D	588	646	689
	E1	596	663	714
	E2	594	660	710
	E3	594	660	710
Cam/Dursley				
	A1	-97	105	252
	A2	84	513	854
	B1	-96	106	253
	B2	-6	310	554
	B3	-6	309	553
	C	-64	180	362
	D	-96	107	255
	E1	6	338	596
	E2	-84	135	296
	E3	-84	135	295
Stonehouse				
	A1	169	298	400
	A2	100	141	169
	B1	135	220	285
	B2	100	142	170
	B3	134	219	284
	C	110	163	202
	D	125	198	252
	E1	104	150	182
	E2	104	151	183
	E3	138	228	297

5.43 The above summary indicates that the different population growth scenarios provide a range of convenience floorspace capacity estimates for the main five towns. Wotton and Nailsworth are the least sensitive to the alternative growth scenarios and their convenience floorspace capacity has a range of no more than 150sq m net at 2026. Stroud and Cam/Dursley have the highest sensitivity to the different population growth scenarios, which is caused by two factors: wide variations in population growth (between 7%-22% for Stroud and 9%-35% for Cam/Dursley) coupled with existing high market shares for convenience facilities in these towns.

5.44 The convenience floorspace capacity range for Cam/Dursley is between 250sq m net and 850sq m net by 2026, although capacity does not arise until after 2015-2021. As already noted, future capacity levels in Cam/Dursley will be sensitive to the introduction of the new Sainsbury's store in Dursley and the effect that this store has on expenditure currently flowing to other stores in the local area and further afield.

5.45 In Stroud, the convenience floorspace capacity range is between 450sq m and 580sq m net by 2015, rising to 860sq m – 1,160sq m net by 2021 and between 1,140sq m net and 1,580sq m net by 2026. However, given that these are based on the continuation of existing shopping patterns, these capacity ranges are likely to be at the top end of expectations given the potential claw back of convenience expenditure to Dursley as a result of the new Sainsbury's store.

5.46 The final town to receive a detailed capacity analysis is Stonehouse. Based on the continuation of existing shopping patterns, our analysis indicates a relatively small range in future capacity levels and at relatively modest total levels by 2026: between 170sq m and 400sq m net. On face value, this may appear surprising given that our interpretation of the different population growth scenarios allow for between 2% and 27% of the District's growth to the directed to the Stonehouse area. Based on the highest growth scenario (A1) the population of the local area could increase by one quarter between 2010 and 2026, which is similar to the level of growth predicted for the Cam/Dursley area under its highest growth scenario (A2). However, the reason for the low and modest range of future capacity in Stonehouse lies in the comparatively low current levels of retention of convenience shopping trips, with a significant proportion of main and top-up food shopping trips leaking to Stroud and stores outside the District. Taking into account the findings of our qualitative assessment, the effect of potential high growth in the Stonehouse area is an issue which will need to be considered through our policy options analysis in the next section of this report.

5.47 A similar process has been undertaken for the comparison floorspace capacity based upon the different spatial growth scenarios. As noted in relation to the convenience capacity assessment, this is a preliminary analysis and is only the starting point for the retail strategy which will need to consider whether interventions in the current pattern of shopping trips should be made in order to meet wider planning objectives.

Table P: Comparison goods floorspace capacity analysis for the main towns (continuation of existing shopping patterns)

Centre / Scenario		2015 (sq m net)	2021 (sq m net)	2026 (sq m net)
Stroud				
	A1	854	2680	4227
	A2	721	2371	3757
	B1	912	2817	4434
	B2	846	2662	4200
	B3	787	2526	3992
	C	767	2477	3919
	D	904	2797	4405
	E1	766	2477	3919
	E2	891	2768	4361
	E3	833	2632	4154
Nailsworth				
	A1	52	171	271
	A2	53	173	273
	B1	56	179	282
	B2	56	179	283
	B3	53	172	272
	C	54	175	276
	D	84	244	380
	E1	63	196	308
	E2	66	203	318
	E3	63	195	307
Wotton				
	A1	45	149	236
	A2	44	147	233
	B1	44	146	232
	B2	43	145	231
	B3	45	148	235
	C	63	191	301
	D	44	146	233
	E1	52	164	261
	E2	51	163	258
	E3	52	165	262
Cam/Dursley				
	A1	74	237	375
	A2	162	443	690
	B1	74	237	376
	B2	119	341	533
	B3	118	340	533
	C	90	274	432
	D	74	237	376
	E1	125	355	555
	E2	81	252	398
	E3	81	252	398
Stonehouse				
	A1	156	443	692
	A2	81	267	425
	B1	122	364	572
	B2	85	276	438
	B3	119	355	558

Centre / Scenario	2015 (sq m net)	2021 (sq m net)	2026 (sq m net)
C	91	291	460
D	113	341	537
E1	85	277	440
E2	89	286	453
E3	123	365	574

5.48 The above analysis indicates, unsurprisingly, that Stroud has by far the largest potential for growth in comparison goods floorspace. Depending upon which strategy option is adopted, the level of additional floorspace capacity by the end of the assessment period (and assuming the continuation of current shopping patterns) is between 3,700sq m net and 4,400sq m net.

5.49 The next highest potential capacity figures are for Stonehouse and Cam/Dursley which range between 300-700sq m net depending upon the spatial growth. These levels of growth are relatively modest, particularly over the medium term, and are sensitive to the existing benchmark turnover level. A similar conclusion should be drawn in relation to Wotton and Nailsworth where even more modest capacity levels are predicted based on the continuation of existing shopping patterns.

Qualitative Need

5.50 In contrast to the approach taken by PPS6, qualitative need is no longer considered a lower level consideration in the context of assessing an overall need for retail development. EC1.4 (d) of PPS4 notes that when assessing qualitative need, local planning authorities should assess whether there is provision and distribution of shopping services which allow genuine choice to meet the needs of the whole community, in light of the objective to promote the vitality and viability of town centres and the application of the sequential approach. In addition, the degree to which shops may be overtrading and whether there is a need to increase competition and the retail mix should also be considered.

5.51 Within the Practice Guidance to accompany PPS4, five indicators of qualitative need are highlighted: deficiencies/gaps in provision; consumer choice and competition; overtrading, congestion and overcrowding of existing stores; location specific needs; and, the quality of existing provision. These factors have been considered in the context of existing and planned retail provision within Stroud District and the results of our analysis for each main settlement is set out below.

Stroud

5.52 The range of comparison retail provision in Stroud is the best in the District, with existing provision able to retain reasonable levels of trips from the local area and also attract shopping trips for all types of comparison goods from across other parts of the District. Operators within the town centre are supplemented by out of centre DIY stores (Homebase & Focus) and other small scale provision throughout the town. However, levels of retention vary dramatically between different comparison goods sectors, with high levels of retention for DIY goods (90%), moderate levels of retention for personal and luxury goods (63%) and recreational goods (47%), but low levels of retention for electrical, clothes/shoes and furniture/floorcovering/textile goods (between 18% - 28%). Higher order provision in Gloucester, Cirencester, Cheltenham and Bristol is attracting shopping trips from the local population.

5.53 Overall, despite its reasonable performance when compared against other towns in the District, Stroud is suffering from a number of qualitative issues. The town centre appears to suffer from gaps in provision which is affecting consumer choice and leading to a leakage of trips. An example of this which has been highlighted to us is that Stroud's non-food sector has failed to benefit from the weekly farmers market in the same way that its convenience sector has benefited. It is recommended that steps should be taken to build upon the success of the farmers market, including better spin off benefits for the comparison goods sector. For example, opportunities should be investigated to widen the range of goods sold from the farmers market, including carefully targeted non-food goods. In addition, the comparison sector within the town centre (alongside the Council) should be encouraged to investigate how it can better take account of the reputation of the farmers market, in terms of taking advantage of the spending power which visitors to the town centre (visiting the market) can bring, along with an investigation as to whether 'retailers' who use the market can collectively occupy a longer term presence in the centre (i.e. occupation of town centre retail units throughout the week, in addition to a single day)

5.54 There is little evidence of overtrading within the existing floorspace stock and therefore improvements to the town centre may need to focus upon the quality of the existing stock in order to make it more attractive to both customers and to attract new businesses to the town. Indeed, vacancies have been rising over recent years, which could suggest the absence of overtrading and/or that existing premises do not meet the needs of retailers.

5.55 Turning to the convenience retail sector, Stroud has three large foodstores (Tesco, Sainsbury's and Waitrose) which are supplemented by smaller Co-op stores, an Iceland in the town centre and smaller scale traders also in the town centre. Provision will be enhanced by the introduction of a discount foodstore within the existing Focus DIY unit. The range of convenience shopping facilities across the town as a whole is considered to be good and there are no significant cross-town issues in terms of choice and competition or the quality of existing provision.

5.56 We have also considered whether there are any overtrading issues associated with congestion and overcrowding at existing stores. It has already been noted that the financial performance of existing stores varies between those which are higher than benchmark and some which are lower. Visits to all of the main stores and the town centre, indicate that the larger stores are clearly popular although there are no significant issues associated with overcrowding and congestion which would warrant a clear qualitative need being identified.

5.57 The one area where consideration should be given to qualitative improvements is the distribution of facilities and identifying locations within the town centre to improve convenience retail provision and support existing retailers. At present, larger scale provision is orientated towards out of centre locations (Tesco and Sainsbury's) whilst the Waitrose store (which lies to the east of the town centre) operates a policy whereby visitors cannot leave their car in the car park and make a linked trip to the town centre, thereby removing its ability to operate as an edge of centre site which benefits the centre.

Nailsworth

5.58 The convenience retail sector in Nailsworth is dominated by the Morrisons store in the town centre. This store attracts 48% of main/bulk food shopping trips from the local area and the town as a whole retains 57%. The only other facilities to attract main/bulk food shopping trips, albeit at a much smaller scale are the Co-op and Tesco Express stores. Having regard to top-up food shopping trips, there is slightly more of an even spread of market share across existing facilities, although the Morrisons still dominates with 43% market share, followed by the Co-op with 13%, the Tesco Express with 20% and other convenience facilities in the town centre with 10%. Overall, Nailsworth is able to retain 86% of top-up food shopping trips.

5.59 However, leakage in convenience expenditure from Nailsworth does occur and the beneficiary of this expenditure are the three larger supermarkets in Stroud (Tesco, Waitrose and Sainsbury's). As a consequence, it is reasonable to conclude that local Nailsworth residents are willing to travel from the local area in order to visit larger convenience shopping facilities.

5.60 In addition to the main/bulk food shopping destinations, Nailsworth possesses a good mix of smaller local independent stores which trade alongside larger facilities. These stores add to the mix and quality of convenience shopping facilities in the town, although the household survey data suggests that the performance of these stores (demonstrated by a much lower market share) is much lower than the larger national multiples (Morrisons, Co-op, Tesco Express). This lower market share results in lower turnover levels.

5.61 Within the comparison retail sector, Nailsworth has the fourth highest market share of the main settlements in the District. The town centre has a reasonable variety of comparison outlets, the majority of which are local independent traders, with an emphasis on quality/niche goods. This is supported by the quality of the town centre environment and a low vacancy rate. However, given its niche role and moderate level of comparison goods floorspace, the town centre does struggle to achieve high levels of market retention in the local area, but does attract a number of trips from across the District.

Dursley / Cam

5.62 At present, within the Dursley/Cam area (Zone 11), 70% of main/bulk food shopping trips are attracted by the Tesco store in Cam, with only 13% of trips retained by stores in Dursley. 8% of trips are leaking to stores in Stroud (most notably the Sainsbury's store) and a further 8% leaking to stores outside of the District. In terms of top-up food shopping trips, the split between Cam and Dursley is more even, with 30% of trips attracted by the Tesco in Cam and 48% of trips flowing to a range of stores in Dursley. There is also leakage of top-up shopping trips, albeit at a relatively small scale, to Stroud and stores outside of the District. Looking outside of the local area, the Tesco store in Cam is able to attract significant levels of main food shopping trips from the Wotton and Berkeley zones (Zones 7 and 9 respectively).

5.63 Existing shopping patterns in the Dursley/Cam area are clearly a product of the scale of existing provision. The Tesco store is a modern (former Co-op) retail unit with adjacent surface level car parking and a reasonably wide product range. In contrast, convenience shopping provision in Dursley town centre is much smaller in scale, with the largest store being the former Somerfield (currently being refurbished as an Iceland store) on Parsonage Street. There is also a Lidl store outside the town centre, although this sells a restricted range of discounted convenience products and therefore is unlikely to be universally attractive as a main/bulk food shopping destination. Dursley does, however, benefit from a range of small niche/independent retailers which serve an important top-up food shopping function and add to the overall attractiveness of the town centre.

5.64 Our experience of convenience stores in Cam and Dursley has found that both the Tesco and Somerfield are popular shopping destinations. The quantitative assessment has confirmed the successful trading performance of these stores and, when balanced against our own visits, we would suggest that these store do overtrade.

5.65 However, the convenience shopping sector in Dursley will soon be significantly altered by the introduction of the Sainsbury's store on Castle Street. The store will be the largest in the town by some considerable margin and is likely to attract a significant number of main/bulk-food and top-up food shopping trips. As a consequence, leakage of convenience trips outside of Dursley is likely to be reduced, with fewer trips to Cam, Stroud and outside of the District. The Sainsbury's store will promote choice and competition within the Dursley/Cam area and will be placed in a location which is hoped will benefit Dursley town centre via linked trips. In our opinion, the Sainsbury's is likely to reduce any overtrading which occurs at the Tesco store in Cam and meet the identified gap in provision within Dursley.

5.66 Having regard to the non-food retail sector in Cam and Dursley, our land use surveys have found that the town centre has a level of provision which is commensurate with the national average although the number of non-food uses has fallen since previous surveys in 2006. The range of provision which is present in the town centre includes a mix of uses, although there is limited provision within each sector and the majority of occupiers are local independent traders. It should also be noted that vacancies have risen considerably over recent years which is a further sign of the lack of overtrading and the need to focus upon the existing floorspace stock

5.67 Whilst all towns within Stroud District suffer from leakage to centres elsewhere, Dursley only retains one eighth of shopping trips for clothing, furniture, electrical and recreational goods. One fifth of trips are retained for DIY and personal/luxury goods. This is a further sign of the apparent qualitative deficiency in existing provision.

Wotton-under-Edge

5.68 Convenience shopping provision in Wotton is small scale and includes Co-op, Tesco Express and local independent traders. The scale of existing provision would suggest that only some top-up food shopping trips can be satisfied although the household survey indicates that almost half of main food shopping trips and 85% of top-up food shopping trips remain within the town. If the survey results are correct, this would suggest an excellent performance for existing stores. However, the balance between the scale of existing provision and its popularity suggests that overtrading occurs and this is reinforced by our own experience of queuing and stocking levels at the Co-op. There is therefore an in principle case for seeking qualitative improvements to the convenience retail offer in Wotton, although the ability to achieve this is explored in the next section of this report.

5.69 Within the comparison retail sector, the range of operators is relatively limited and based primarily around the local independent sector. However, for a town of this size, Wotton is considered to be relatively successful is retaining shopping trips within the DIY, personal and luxury goods and recreational goods sectors. There is also a reasonable level of retention in furniture/carpets/textiles shopping trips.

5.70 The retail floorspace stock within Wotton is relatively historic with no recent additions, and the urban fabric of the town centre indicates that there is relatively little scope for large scale redevelopment along Long Street. In addition, the nature of existing units suggests that not all operator requirements, particularly national multiple operators, can be satisfied. Within this context, the majority of properties are occupied and only 8% of units currently lie vacant. This is considered to be a reasonable level although vacancies have risen since 2006.

5.71 Overall, there are clearly opportunities for qualitative improvement for both convenience and comparison retailing in Wotton. However, the scope for improvements will be limited by the town's natural catchment area, the opportunities for the provision of new space within the town centre and the need to protect the health of the existing centre.

Stonehouse

5.72 Within Stonehouse, convenience shopping is dominated by the Co-op store on High Street which provides the largest food store within the town. The store is reasonably popular for both main and top-up food shopping and extends to circa 1,000sq m net sales area. Elsewhere in Stonehouse town centre, the remainder of convenience retail provision is much smaller in scale and comprises independent traders such as butchers, health food, greengrocers and a newsagent. These stores provide a top-up food shopping function. Elsewhere in the local area, the Co-op store on Elm Road in Stonehouse has limited appeal for both main and top-up food shopping, although the household survey indicates that the Co-op in Eastington is a popular convenience shopping destination.

5.73 Overall, the Stonehouse/Eastington area is able to retain around one fifth of main food trips and just over half of top-up food shopping trips. The main destinations for leakage of convenience goods expenditure are Stroud (for main and top-up food trips) and stores outside of the District (for main food trips). This level of leakage is unsurprising given the size of stores in Stonehouse when compared with Stroud and we consider that there are qualitative opportunities for improvement in the area's convenience retail offer. However, it should be noted that there is no significant evidence of overtrading in existing stores.

5.74 Within the comparison retail sector, there has been an increasing number of units over recent years, although the proportion of comparison uses is below the national average and remains below the level of service uses in the centre. The comparison sector has a varied selection of uses, although generally there is only one retailer within each sector which reflects the trading profile and the market share of the centre. In most cases, the market share of the centre for the different types of comparison goods shopping does not rise above 10%-15% apart from electrical goods which is much higher. Indeed, in most sectors, stores in Stonehouse do not attract trade from outside of the local area, apart from the electrical and recreational goods sectors. Stonehouse attracts the second highest level of comparison goods expenditure for the five main centres in the District (circa £10m) and around half of this expenditure is derived from the electrical and domestic appliance sectors. This level of expenditure is considered to represent a good trading performance for Stonehouse, which is reflected in the low level of vacancies in the centre.

Berkeley, Painswick & Minchinhampton

5.75 The other main settlements in the District (Berkeley, Painswick and Minchinhampton) whilst possessing their own very individual characteristics as settlements in their own right have similar shopping functions and qualitative retail characteristics. These centres have generally lower levels of convenience and comparison goods retail provision, with the convenience sector generally serving a top-up food shopping function. The convenience sectors within these centres nevertheless perform relatively well and are clearly visited by the local communities they serve. Berkeley in particular appears to perform well which may well be a product of its location and distance from the other main settlements in the District. Given the size of these centres and their natural catchment areas, it would be unrealistic to strive for significant levels of main and top-up food expenditure retention within these settlements and we consider that attention will need to concentrate upon maintaining their day-to-day shopping roles. There is no evidence of significant levels of overtrading and/or congestion within the convenience sector in these centres and the qualitative focus will be on maintaining and enhancing the existing retail offer.

5.76 This food shopping role will be complemented by the modest comparison shopping role of these centres, which will inevitably concentrate upon local and niche shopping roles. Comparison stores in towns such as Painswick and Minchinhampton are considered to trade at modest levels and qualitative issues associated with these towns relate to the need to provide a floorspace stock which meets the specific needs of businesses which provide an important contribution to the health of these centres.

6. POLICY OPTIONS ANALYSIS

Introduction

6.1 In order to assist Stroud District Council to progress the production of their Local Development Framework documents, it is important that this study uses the survey findings as contained in the preceding chapters of this report to develop broad policy options for retailing and town centres in the Stroud District area. This will allow the Council to develop a front-loaded Local Development Framework and encourage a meaningful response from the local community and key stakeholders on a genuine choice of options for retail uses.

6.2 This section considers the outputs from the town centre health checks, plus the quantitative and qualitative analyses, to help define the potential options for a retail strategy for the District. In turn, it will assist the Council in agreeing an area specific vision, defining the objectives for its Local Development Framework documents and defining a spatial strategy which is consistent with other policy documents.

6.3 Such an approach is in line with the Practice Guidance accompanying PPS4 which notes that, to be appropriate and deliverable, a retail strategy needs to be based on sound evidence which demonstrates an understanding of the existing situation and the potential and opportunities for change. Building on the assessments of need for retail and other key town centre uses, four common steps can be identified:

- An audit of existing centres to identify their current vitality and viability and their potential to accommodate redevelopment and/or change having regard to identified needs.
- Consideration of alternative centres and/or sites and development opportunities to accommodate new development (in existing centres or in new/expanded centres) and to consider the potential role for different centres.
- Based on the above an evaluation of alternative policy options to accommodate growth and/or plan for change.
- Developing the strategy and policy for retailing through the LDF in accordance with the principle set out in PPS12.

6.4 However, before potential options are discussed, it is important to identify potential development sites and opportunities which are capable of accommodating any identified needs.

Identification of Potential Retail and Town Centre Development Sites

6.5 Policy EC5 of PPS4 notes that local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. PPS4 states that an apparent lack of sites of the right size and in the right location should not be a reason for local planning authorities to avoid planning to meet the identified need for development. Local planning authorities should:

- base their approach on the identified need for development
- identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served
- apply the sequential approach to site selection (see policy EC5.2)
- assess the impact of sites on existing centres (see policy EC5.4)
- consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development

6.6 PPS4 advises that sites for main town centre uses should be identified through a sequential approach to site selection. Under the sequential approach, local planning authorities should identify sites that are suitable, available and viable in the following order:

- locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period
- edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre
- out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre

6.7 Following discussions with Stroud District Council, a number of potential development sites have been identified within the main settlements and these are listed below [It should be noted however that this list is not necessarily a reflection of the full range of possible suitable sites within the main settlements since GVA Grimley may be unaware of other potential opportunities. In particular, other sites may emerge through preparation of the LDF]:

1. Berkeley Hospital, Marybrook Street, Berkeley
2. Rear of Parsonage Street, Dursley
3. Tesco / Shops fronting High Street and Land at Chapel Street, Cam
4. Police Station, Parliament Street / Church Street Car Park, Stroud
5. London Road Car Park, Stroud
6. Merrywalks, Stroud
7. Cheapside / Wallbridge, Stroud
8. Days Mill / Old Market, Nailsworth
9. Renishaw Site 1 – Land Rear of Haw Street / Market Street, Wotton-under-Edge

10. Renishaw Site 2 - Old Town, Wotton-under-Edge

11. Existing Police Station / Car Park / Health Centre, Stonehouse

6.8 In order that the comparative overall suitability of each potential development location can be assessed, our assessment has tested each location against a range of criteria which are applicable to both the ‘principle’ of each site being identified for retail uses and a number of detailed criteria which will guide how each site is (re)developed. These criteria include access, neighbouring uses, ability to meet identified need, commercial attractiveness, development costs, visual impact and ease of displacing existing uses.

6.9 For the avoidance of doubt, it should be noted that the assessment of potential retail development sites is a stand-alone exercise and it should not be assumed that the identification of sites in a particular town automatically infers that GVA and/or Stroud District Council accept that there is a need for additional retail development.

6.10 The assessment of each option against each of the above criteria is contained on the proforma sheets overleaf.

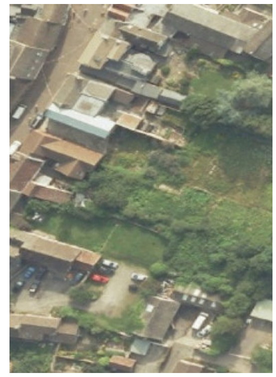
SITE 1: Berkeley Hospital – Marybrook Street, Berkeley, GL13 9AD

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located off Marybrook Street and is sited to the rear of the buildings which front onto Market Place.
Site area / size	0.15 ha
Existing land-uses	Community hospital and associated car parking.
Adjoining land-uses	To the north of the site is the Marybrook Medical Centre and a public car park which is accessed off Marybrook Street. Residential properties adjoin the site to the east and to the south there are buildings which front onto Market Street which largely comprise of retail/commercial and residential above.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site falls outside of but adjacent to the defined town centre and Berkeley Conservation Area. It is not allocated for a specific land use in the adopted Local Plan.
C. ACCESSIBILITY	
Accessibility by private car	Access by private car through the site is constrained to a one-way system due to the narrow exit at the eastern end of the site.
Accessibility by public transport	There is a bus stop directly outside of the site on Marybrook Street. However, the majority of bus services run from Salter Street in the town centre which is within walking distance. There is no train station in Berkeley.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Limited access which is currently restricted to one-way traffic flow.
Parking	Existing parking on the site which serves the hospital. There is public car parking situated to the north of the site.
Impacts on neighbouring properties / land	Limited impact on neighbouring properties as site is not elevated. Residential properties bound the site to the east. The main Berkeley Hospital building is Grade II Listed.
Visual Impact	Site lies outside of the defined Conservation Area. Main hospital building is Grade II Listed and therefore any redevelopment would need to be sympathetic to the main building which fronts Marybrook Street.
Servicing	Servicing is constrained by the relatively constrained access leading off Marybrook Street.
Difficulties with displacing existing uses	The site currently accommodates a community hospital, although it is understood that the existing use will be relocated to Dursley.
Environmental impacts	It would appear that part of the site does lie within Flood Zone 2. It is recommended that this is confirmed with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site is currently located outside of the defined town centre and does not provide a natural extension with limited opportunity for the site to be adequately linked with the main shopping area. Furthermore, the site is constrained in terms of access and the adjacent Listed Building. Retail could come forward but as part of a wider mixed use development.
Development Costs	Flood mitigation measures may be required. This is subject to further investigation. Listed building may add to development costs.
Timescale	Given the site's existing community use and constraints for comprehensive redevelopment, it is unlikely to come forward in the short term.
Commercial Attractiveness	Berkeley Town Centre is quite limited in terms of its retail provision and there is not a significant need for additional floorspace. Therefore, for primarily retail use, the site has limited commercial attractiveness.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	There are vacant properties within the existing town centre and therefore it is unlikely that this site will be required in the short term as a means of addressing identified retail need.
Trade Draw	Whilst retail floorspace on this site has the potential to retain more trips in Berkeley, it is separated from the town centre and could act as a detrimental stand alone shopping destination.

CONCLUSIONS

The site is within walking distance to the town centre and lies adjacent to a public car park. The access to the site is constrained and any redevelopment need to consider its potential impact on the setting of the Grade II Listed main hospital building which fronts onto Marybrook Street. The site does not app an obvious extension to the town centre.

SITE 2: Rear of Parsonage Street, Dursley, GL11 4AA



ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located within the defined town centre of Dursley, situated to the south (and at the rear of) the primary shopping area on Parsonage Street. There are potential pedestrian links with Parsonage Street; the western part of the site is accessed via Prospect Place off May Lane and the eastern part from The Slade housing estate.
Site area / size	0.43 ha
Existing land-uses	The eastern part of the site is currently vacant, whilst the western side leading from Prospect Place accommodates employment uses in the form of a garage and small light industrial/storage units.
Adjoining land-uses	To the north the site lies adjacent the primary shopping area on Parsonage Street and the associated storage and services at the rear. To the east and south east lies a residential development. Residential properties also adjoin the site to its west with a mix of uses on May Lane.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site lies within the defined town centre and partly falls within the Dursley Conservation Area. The site is not allocated for a specific land use within the adopted Local Plan.
C. ACCESSIBILITY	
Accessibility by private car	The site is currently restricted in terms of access from Prospect Place which is narrow and currently unsuitable for an increase in vehicular trips. There is scope to access the site from the residential development to the east, however this may cause an element of conflict in terms of safety.
Accessibility by public transport	There are bus stops within ‘easy’ walking distance, both on May Lane and Kingshill Road. These provide links to nearby villages and towns and the Cam and Dursley Railway Station. The site is also within walking distance of the Primary Shopping Area on Parsonage Street.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Servicing access is considered to be the main constraint to the site where significant investment is required to provide a suitable access. Furthermore, in order to link successfully with the primary shopping area, new pedestrian links will need to be provided to Parsonage Street.
Parking	The site is large enough to accommodate an element of car parking (subject to a suitable access being provided) and is within walking distance to Council car parks on May Lane and Castle Street.
Impacts on neighbouring properties / land	There are a number of Listed Buildings on Parsonage Street which will need to be considered when investigating potential redevelopment.
Visual Impact	Part of the site lies within the defined Conservation Area and therefore any redevelopment will need to be sensitive to the character of the remainder of the Conservation Area.
Servicing	The existing access is a significant constraint in terms of servicing and will need considerable investment.
Difficulties with displacing existing uses	There are a number of businesses present on the site which would either need to be relocated or retained on the site as part of a wider redevelopment. However, the existing uses are not typically complementary to town centre uses.
Environmental impacts	The site is not located within the flood plain. There is potential for contamination on the site and therefore further investigations are recommended.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site is situated within the town centre boundary and has scope for providing adequate links with the primary shopping frontage that would allow the delivery of a natural extension. However, given the constraints in terms of servicing access, a purely retail scheme on this land is unlikely to be deliverable.
Development Costs	The existing buildings would need to be demolished and may require mitigation measures to address any identified contamination.
Timescale	Taking into account the level of work required for this site, it is likely to only be deliverable in the long-term and therefore towards the end of the plan period.
Commercial Attractiveness	There are a number of vacancies within the town centre and therefore this suggests a potential oversupply of retail units. There are a number of constraints for this site that would need to be overcome and therefore it has limited commercial attractiveness in the current market.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site is within the town centre and could, in principle, accommodate retail provision. However, there is limited need identified as a result of the current vacancy rates.
Trade Draw	If the site can be linked into the core town centre area, then development in this location could have a minor positive impact upon the health and performance of the centre

CONCLUSIONS

The site has a number of constraints and with limited scope for adequate links for servicing to be provided, would suggest that a primarily retail developmen location is not deliverable. However, it is recommended that further investigations are carried out to look into whether retail could come forward as part of a mixed use development, should existing site constraints be overcome.

SITE 3: Tesco / Shops fronting High Street and Land at Chapel Street, Cam, GL11 5PS

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located to the east of the High Street and Chapel Street in Cam. The retail units front the High Street with the Tesco supermarket accessed off the mini roundabout which is situated between the High Street, Chapel Street and Cam Pitch. The site also incorporates an area of vacant land and two residential properties which are accessed off a small lane to the east of Chapel Street.
Site area / size	2.2.4 ha
Existing land-uses	The predominant land use is the Tesco supermarket and car park. To the west of the supermarket and fronting onto the High Street, there are small independent retail units with either storage or residential above. There is a vacant plot of land in the southern end of the site which was previously a public car park. The site also includes two residential properties which are accessed from Rowley lane, off Chapel Street, and are both now vacant.
Adjoining land-uses	The River Cam runs to the rear of the site and farmland lies beyond. Other adjoining uses include residential, a church and village hall.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site is located within the defined town centre. The Tesco supermarket and buildings fronting High Street are designated as a Local Shopping Centre (Policy SH14) in the Local Plan.
C. ACCESSIBILITY	
Accessibility by private car	The main access to the site is from the mini roundabout where the High Street meets Chapel Street and Cam Pitch. The access currently serves the existing Tesco supermarket. The southern end of the site incorporates Rowley, a lane which links Chapel Street to the two vacant residential properties. This lane is narrow and access onto Chapel Street is restricted.
Accessibility by public transport	There is a bus stop within the site, on the Tesco Forecourt. There is also a bus stop directly in front of the site on Chapel Street where links are provided to the Cam and Dursley railway station.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The main access into the site can accommodate a high volume of traffic movements. However, the southern end of the site is served by a small lane which is highly constrained.
Parking	The site accommodates a large car park which is for customers of the supermarket. The site previously accommodated a public car park which has since been cleared. Further retail development on this site might require its own car parking provision.
Impacts on neighbouring properties / land	There are residential properties which form part of the Rowley estate to the south east of the site. The two residential properties which would have been most affected are now vacant and form part of the site.
Visual Impact	There would be limited visual impact in terms of redeveloping the currently vacant plot of land.
Servicing	Unlikely to be a significant constraint to development, with existing access point likely to be used.
Difficulties with displacing existing uses	The supermarket has been recently refurbished and therefore will be difficult to displace or redevelop. There are numerous independent retailers fronting onto the High street. The vacant site would appear ready for development.
Environmental impacts	There is a designated Flood Zone 2 which runs alongside the River Cam at the rear of the site. Part of the site may fall within this flood zone. It is recommended that this is further confirmed with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The vacant plot of land on the site could deliver additional retail provision.
Development Costs	The main costs involved will be to ensure the site benefits from a suitable access (either to use existing Tesco access or to develop a new access onto Chapel Street). Flood mitigation may also be required.
Timescale	The vacant plot would appear ready for development and therefore it is considered that this has the potential to come forward in the short term.
Commercial Attractiveness	The presence of the supermarket and its draw on trade enhances the commercial attractiveness of this site. The future attractiveness of the site is partly dependent on where further housing development will be located and whether Cam will accommodate an urban extension.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site could provide a natural extension to the District Centre in order to meet identified need.
Trade Draw	Further development in this location has the potential to attract further shopping trips to Cam district centre. Development must ensure that a high quality extension to the existing district centre is provided. Consideration will also need to be given to the impact of further development in this location on Dursley town centre.

CONCLUSIONS

The retail units fronting the High Street have the potential for further enhancement but there would be difficulty in displacing the existing uses. The vacant plc on the southern end of the site would appear a ready site for development but may need to incorporate its own car parking and access, depending on wheth agreement can be reached with Tesco. The development of this Brownfield plot would enhance the visual attractiveness of the District Centre.

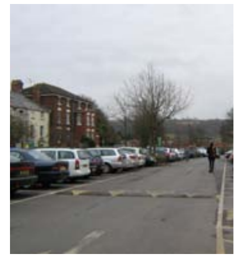
SITE 4: Police Station, Parliament Street / Church Street Car Park, Stroud, GL5 1QQ

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site incorporates a large area of land with a variety of land uses. It includes land to the north and south of Parliament Street. The northern part of the site lies to the west of Ryeleaze Road and is bound to the west by Church Road. The southern part of the site is bound to the north by Parliament Street and Castle Street to the south.
Site area / size	1.43 ha
Existing land-uses	The site comprises of the Stroud Police Station, Magistrates Court and associated car parking, two council owned car parks and retail/commercial/residential properties in the south western part of the site, fronting onto Nelson Street.
Adjoining land-uses	A pair of semi-detached residential properties adjoins the police station element of the site to the east. The Council car park in the north west part of the site adjoins a church to the west and retail premises to the south. The Council car park in the southern half of the site is bound by 3/4 storey residential flats to the south east.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site lies within the defined town centre boundary. The Church Street car park is located within the Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	The site has different parcels of land within it and each has its own individual access point. The retail units with commercial/ residential above fronting Nelson Street are accessed off Nelson Street with limited on-street parking. The council owned car park in the southern half of the site is accessed from Parliament Street. The Magistrates Court has its own access off Parliament Street. The Police Station is accessed from Ryeleaze Road which slopes steeply. The Council Car park at Church St is accessed off Ryeleaze Road, and is sited on a bend with traffic calming measures in place along Brick Row, a narrow, primarily, residential street.
Accessibility by public transport	The nearest bus stops are located on Cornhill to the south of the site and Ryeleaze Road, directly outside of the Council car park. The train station is 400-500m walking distance and can also be accessed by bus.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The main constraint in terms of access is the gradient of both Parliament Street and Ryeleaze Road. Furthermore, Brick Row at the bottom of Ryleaze Road is a narrow, primarily, residential street and therefore would appear unsuitable for accommodating an increased number of vehicular trips. Parliament Street would present the most suitable option for a main access point into the site as this is where visibility is at its highest.
Parking	The site currently accommodates a significant amount of parking. The Police Station and the Magistrates Court have their own element of parking and there are two Council Car Parks – the Church Street car park (78 spaces) and Parliament Street car park (125 spaces).
Impacts on neighbouring properties / land	The two residential properties that adjoin the Police Station to the west could be affected by redevelopment of the site. The Court building and its associated car parking overlook the residential properties due to the gradient. Any development at the Church Street car park would need to consider any potential impact on the setting of the Grade II Listed Church. At the southern end of the site, any redevelopment would need to consider potential impact on the residential uses which bound the site to the east and retail premises on the opposite side of Nelson Street.
Visual Impact	The site itself is on a higher level than the town centre and therefore could potentially impact on views into and out of the centre.
Servicing	The main constraint to servicing is the gradient of both Parliament Street and more notably, Ryeleaze Road.
Difficulties with displacing existing uses	The Police Station and Magistrates Court would need to be relocated to another site. It is likely that part or all of the Police Station will want to retain a central presence within Stroud to ensure continued accessibility. The site contains a significant amount of car parking provision which may need to be retained or provided on an alternative site.
Environmental impacts	The site is not located within a floodplain. With no previous industrial uses on the site, significant contamination is unlikely.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site is located within the town centre and therefore could provide additional retail provision should adequate links be possible to the High Street. Some existing uses and car parking may need to be retained on site.
Development Costs	The main costs involve the demolition of the existing buildings and the delivery of a comprehensive site for redevelopment that has a suitable access.
Timescale	Given that the site is currently occupied by a variety of land uses, it is unlikely the site will come forward in the short term.
Commercial Attractiveness	The site is located within the defined town centre and also near to the primary and secondary shopping areas on the High Street. However, there does appear to be a clear barrier in the form of the junction at the western end of Parliament Street which will need to be overcome.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This is a large site which has the potential to meet identified need and could be delivered as an extension to the existing primary and secondary shopping area.
Trade Draw	Retail development on this site has the potential to provide a positive impact upon the health and performance of Stroud town centre

CONCLUSIONS

The site is divided by Parliament Street and its major constraints are its gradient and the number of uses which would need to be relocated or incorporated ir redevelopment. The Police Station and the Magistrates Court are 1960s buildings which do not contribute to overall attractiveness of the site or the town cen south west. It is recommended that options are examined which look at redeveloping the police station and the magistrates court for a mixed use developme incorporates public car parking. The retail units fronting Nelson Street accommodate a range of independent retail units and any redevelopment could negati on the remainder of the retail uses fronting Nelson Street.

SITE 5: London Road Car Park, Stroud, GL5 2AJ



ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	This site includes a long strip of land which runs adjacent to London Road and is sited behind a terrace of residential/commercial properties. Part of the site lies within Stroud town centre. It is within easy walking distance to the primary shopping area and the railway station.
Site area / size	0.70 ha
Existing land-uses	The site includes a Waitrose supermarket car park in the south eastern part of the site. This and the remainder of the site are accessed from a mini roundabout on London Road. The northern part of the site incorporates a Council owned multi-storey car park (358 spaces) and a surface car park (139 spaces).
Adjoining land-uses	A Waitrose supermarket adjoins the site to the south east. A railway line bounds the site to the south and the land then drops with Dr Newton's Way beyond. Offices, residential and retail units adjoin the north eastern boundary of the site and front onto London Road. To the north west of the site, are retail units, offices and the railway station, all of which are included within the Stroud town centre.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site lies outside of the Conservation Area. The northern half of the site falls within the defined town centre. It is not allocated for a specific land use.
C. ACCESSIBILITY	
Accessibility by private car	The site has an existing access from a mini-roundabout onto London Road. This is designed to cater for a high volume of traffic using both the supermarket and the town centre car parking.
Accessibility by public transport	There is a bus stop directly outside of the Waitrose supermarket on London Road. The railway station is within walking distance.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access into the site is good, with a purposely designed mini roundabout on London Road.
Parking	The site currently accommodates a significant amount of town centre car parking (497 spaces) in addition to the provision for customer car parking at Waitrose. Any redevelopment will need to consider whether this provision of car parking will need to be retained on site and the overall impact on car parking provision across the town centre.
Impacts on neighbouring properties / land	The main properties that would be impacted by any redevelopment are the terraced properties fronting onto London Road which bound the site to its north east and the Waitrose supermarket. Numbers 38 to 43 London Road are all Grade II Listed and therefore any redevelopment would need to consider any potential impact on their settings.
Visual Impact	The site currently accommodates a MSCP which was designed in a style to complement the industrial mills in the locality. The site itself is on a higher level to that of Dr Newton's Way which accommodates an industrial estate. The site lies outside of a defined Conservation Area.
Servicing	The site can be serviced through the existing access point.
Difficulties with displacing existing uses	The main constraint is the existing provision of car parking which may need to be retained. This will need to be investigated further. Should this level of parking be retained, there is little scope for development given that the majority of the existing provision is sited within a MSCP and therefore offers limited opportunity for intensifying this quantum of car parking over a smaller site area.
Environmental impacts	The site does not appear to lie within a designated flood plain. However, it is recommended that this is confirmed with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The northern part of the site falls within the town centre and therefore could, in principle, deliver retail units. However, the site currently accommodates a significant amount of car parking and it is unclear at this stage whether this will need to be retained on site.
Development Costs	The main cost would be demolition, should the MSCP be removed. There are no other abnormal costs identified at this stage.
Timescale	The site is currently utilised for parking and is therefore unlikely to come forward in the short term i.e. within 5 years.
Commercial Attractiveness	The presence of the Waitrose supermarket enhances the commercial attractiveness of the site for retail uses. However, the primary shopping frontage is located at some distance away.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The ability to meet identified need is dependent on whether the car parking provision would need to be retained on site.
Trade Draw	Development in this location could have a positive impact upon the attractiveness of shopping facilities in Stroud, although this will need to be balanced against the loss of car parking in this location.

CONCLUSIONS

The site is located in an accessible position within walking distance to the town centre. It has a good access from London Road. The main constraint in takin site forward for retail development is the quantum of car parking and whether this level of provision will need to be retained on site or whether there are any suitable sites.

SITE 6: Merrywalks, Stroud, GL5 1QA

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	This site fronts Merrywalks (part of the A46). The site comprises of parcels of land which are sited immediately north east of the Railway Viaduct with the Stroud & Swindon building beyond to the south. The site is included within the defined Town Centre boundary. The primary and secondary shopping areas are located to the east of the site.
Site area / size	0.80 ha
Existing land-uses	The site includes a Council owned surface car park (24 spaces), Rowcroft doctors surgery and associated parking, a McDonalds restaurant and drive thru, a nightclub and a vacant factory building. Part of the site has planning permission for mixed use development.
Adjoining land-uses	Adjoining the site to the north east is the Merrywalks Shopping Centre, Bus Station, Multi-screen cinema and bowling alley. Bounding the site to the east and south east are retail/commercial premises.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The bus station and cinema site is allocated within the Local Plan (Policy SH5) for mixed use and has since been developed as a mixed leisure / retail development. The site lies within the town centre and outside of the Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	The site, due to its multiple ownerships, has 4 separate access points. The Council car park is accessed from a side road off of Merrywalks which runs adjacent to the shopping centre. This is currently a one-way system with the exit to the car park straight onto Merrywalks. The doctor's surgery and McDonalds each have their own accesses onto Merrywalks. The nightclub and the vacant factory share an access. Merrywalks (A46) itself is a busy road and can be congested at peak times.
Accessibility by public transport	The site is highly accessible by public transport as it lies adjacent to the Stroud Bus Station which provides services to neighbouring towns and villages as well as other sub-regional centres. The train station is within easy walking distance.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access to the wider site is currently provided by 4 different accesses. The redevelopment of the site as a whole may require a new, comprehensive access.
Parking	There is public car parking on the site which may need to be retained. The site is large enough to accommodate parking as part of a retail/mixed use development.
Impacts on neighbouring properties / land	The terrace of commercial/ retail units to the south could be impacted by any redevelopment but the site is large enough for any such impact to be minimised.
Visual Impact	The existing nightclub and vacant factory building are two-storey properties which are in need of repair and therefore their redevelopment may enhance the attractiveness of the site. The McDonald's restaurant and Rowcroft surgery are both sited within large plots and set back from the Merrywalks road. The site lies outside of the Conservation Area and with the modern appearance of the cinema/bowling development, there would appear scope for comprehensive redevelopment.
Servicing	The site is currently accessed from a number of access points. Should the site come forward as a whole, there will need to be a comprehensive access point.
Difficulties with displacing existing uses	The site is within multiple-ownership and the majority is occupied (except for the vacant factory/commercial building). The doctor's surgery will need to be relocated or incorporated on-site as part of any redevelopment.
Environmental impacts	There could be potential contamination on the site. This will need a survey to confirm. Part of the site may fall within flood zone 2 and it is recommended that this is confirmed with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site is situated within the town centre and is therefore suitable, in principle, for retail development. Given the adjacent leisure development, this is also another potential land use that could be incorporated.
Development Costs	The main costs will be the relocation, if necessary, of the existing uses, the provision of a safe access onto Merrywalks and any required remediation works.
Timescale	Given that the site is largely occupied, this is likely to be a long-term redevelopment option (i.e. later part of the plan period).
Commercial Attractiveness	Commercially, the site is attractive due to its town centre location and prominent frontage onto Merrywalks. However, the removal of the existing buildings and uses and potential highway works will add significant cost to any potential project.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site would provide a natural extension to the Merrywalks shopping centre and has the potential to accommodate the identified need.
Trade Draw	Redevelopment of this site for retail uses has the potential to provide a positive impact upon the health and attractiveness of Stroud town centre

CONCLUSIONS

The site is in a very attractive location, being accessible to the town centre but located outside of the Conservation Area, thereby providing more opportunitie comprehensive redevelopment. However, due to the multiple ownerships and the current uses, there is likely to be a barrier in establishing a comprehensive development site. The site should be assessed further in the context of retail / leisure led mixed use development and if it does come forward, it is likely to be long-term.

SITE 7: Cheapside / Wallbridge, Stroud, GL5 3BN	
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	This is a large site which incorporates a range of uses and is accessed from Cheapside which feeds off a roundabout with Wallbridge and Rowcroft. The railway lane bounds the site to its east/north-east and the railway station is accessed by a footbridge. Part of the site is within the town centre. The Stroudwater Canal runs through the middle of the site, although there is a significant drop in level from the Cheapside element to the canal which runs at the same level as the industrial buildings below on Dr Newton's Way.
Site area / size	2.99 ha
Existing land-uses	The site currently accommodates a Council owned surface car park (187 spaces) and separate parking attached to the railway station. The site includes a 7/8 storey block of residential units (Hill Paul) which was converted from an abandoned factory. Adjacent to the residential building, there is a vacant plot of land which has planning permission for 101residential units and 47,000 sq ft of commercial and retail uses. In the south western corner of the site, there is an existing Travis Perkins builders merchant which is sited on a lower level to the remainder of the site and is accessed from Dr Newton's Way.
Adjoining land-uses	The railway line bounds the site along its eastern/north eastern boundary with town centre uses beyond. To the south, at a lower level, there are industrial buildings. To the south west there are residential buildings but these are at a lower level.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site is designated under Policy SH6 (Site MU5a) for mixed use development including residential, public transport interchange, public car parking and town centre uses. To date, only the Hill Paul factory redevelopment for residential use has been implemented.
C. ACCESSIBILITY	
Accessibility by private car	The majority of the site (not inc. Travis Perkins) is accessed from Cheapside which is a relatively narrow access and is constrained in terms of two-way traffic flows.
Accessibility by public transport	The site lies adjacent to the railway station and also within walking distance of the bus station at Merrywalks.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Access to the site may need to be improved should uses on the site be intensified.
Parking	The site currently accommodates 187 car parking spaces in addition to the provision intended for the railway station. An element of car parking will need to be retained for the railway station. It is recommended that further assessment of the need for car parking at this location is carried out.
Impacts on neighbouring properties / land	The main property that will be impacted by any future development is the Hill Paul residential development. Therefore, any development will need to be sympathetic in terms of design - loss of light, overlooking etc.
Visual Impact	The site is at a higher level to the industrial units on Dr Newton's Way and therefore development could have a significant visual impact. However, given presence of the Hill Paul building there is scope to develop beyond 2 storeys at this location.
Servicing	The existing access off Cheapside is relatively constrained and may need investment in order to enable the site to be serviced.
Difficulties with displacing existing uses	The main constraint will be displacement of the existing car parking. However, there may be an opportunity to intensify car parking provision over a smaller site area.
Environmental impacts	The site could be contaminated and therefore this will need to be investigated further. The site does not appear to be located within the flood plain. However, it is recommended that this be further confirmed with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site is close to the town centre but the railway line does provide a barrier to a natural extension to the town centre. However, a site in this location and taking into account its sustainability, could deliver an element of retail uses as part of a wider mixed use development.
Development Costs	Costs could include the enhancement of the existing access, any de-contamination required and potential incorporation of a multi storey car park..
Timescale	If the existing planning permission is implemented, part of the site would come forward in the short term. For the remainder of the site, this is likely to be medium to long term.
Commercial Attractiveness	This area is likely to be attractive as a mixed use development opportunity.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site is large enough to meet identified retail need. However, given the perceived barrier of the railway line, this site is considered unsuitable to deliver large-scale retail development.
Trade Draw	Care needs to be taken with the provision of retail uses in this location. The site is separated from the core town centre area and linkages are problematic. Retail development should be controlled in order that it does not become a stand alone shopping destination.
CONCLUSIONS	
This site presents a clear opportunity for mixed use development that complements the town centre. However, it is considered that retail uses should be developed as part of a wider mixed use development rather than as a stand alone development.	

Comment [D1]: Dropped?

SITE 8: Days Mill / Old Market, Nailsworth, GL6 0DU

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located in and around Old Market, which connects Spring Hill with Chestnut Hill. The site incorporates a variety of land uses that sit to the west of Fountain Street. The main access to the site is from Spring Hill which leads from a mini roundabout that connects Spring Hill, Bridge Street (A46) and George Street.
Site area / size	1.36 ha
Existing land-uses	This is a large site and incorporates a variety of land uses, including that of a bus station (no terminal building), public toilets, car parking (on-street), retail units, library, police station and industrial / commercial premises.
Adjoining land-uses	Running along the western boundary is the Nailsworth Stream and the retail units beyond which front onto Fountain Street. Adjoining the site to the west at its northern end are retail units (Tesco Express incorporating a post office, takeaway, an Indian restaurant and a wine warehouse) and a residential development (Maple Tree Court). Further south, a council car park adjoins the site (29 spaces) to the west. The southern end of the site is adjoined by retail / commercial units.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site lies within the defined town centre and Conservation Area. The eastern half of the site falls within an identified Floodplain (Zone 3).
C. ACCESSIBILITY	
Accessibility by private car	Currently, the main access into the site is from Spring Hill which leads from a mini roundabout off the A46 which is the main route through the town. This junction can get congested at peak times.
Accessibility by public transport	The site incorporates the bus station and therefore has good access to the local bus services. The nearest train station is located at Stroud.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The access into the site is typically good and would appear suitable for accommodating an intensified range of uses.
Parking	The site incorporates on-street car parking and it is likely that the parking provision will need to be retained in order to serve the town centre. However, there may be opportunities to provide further off-street parking if necessary.
Impacts on neighbouring properties / land	Redevelopment of this site will need to consider any likely impact on neighbouring residential uses, especially the retirement development of Maple Tree Court (which overlooks and adjoins the site to the west) and properties to the east. The site is large enough to accommodate development whilst taking this into account.
Visual Impact	The site currently accommodates a range of building types, some of which do not necessarily contribute or are sympathetic to the typically historic town centre. The site lies within the Conservation Area and contains listed buildings and therefore any redevelopment proposals will need to take this into account.
Servicing	The site is currently accessed from Spring Hill and the site is sufficiently large to accommodate servicing areas, if necessary.
Difficulties with displacing existing uses	The site accommodates community uses, including a library and a police station which may need to either be relocated elsewhere within the town or included as part of any redevelopment. There are also a number of independent retail units which would need to be incorporated. The bus station is likely to remain in this area, although this could be delivered as a series of bus stops.
Environmental impacts	Part of the site appears to fall within Flood Zone 3. It is recommended that this is further investigated with the Environment Agency.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site presents an excellent opportunity for expanding the existing retail provision within the town centre. Given the existing community uses which exist, a mixed use development comprising of retail, leisure, community and residential uses could potentially come forward.
Development Costs	The main costs to the development of this site are those concerned with establishing a comprehensive site and incorporating all of those elements/uses which need to be retained.
Timescale	For comprehensive site-wide development, this is likely to be in the medium to long term. However, smaller plots could come forward in the short term.
Commercial Attractiveness	The site is attractive due to its location within the town centre and the general commercial attractiveness of the town and its niche / convenience offer.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site could provide both additional convenience and comparison uses that complement the existing provision within the town centre.
Trade Draw	Development in this location has the potential to provide a positive impact upon the health and performance of the town centre

CONCLUSIONS

This site presents an excellent opportunity to enhance the retail offer within Nailsworth and complement the existing town centre. Redevelopment of this sit could vastly improve the environmental attractiveness of the town centre and enhance accessibility. It is considered that a mixed use development would b most suitable option which incorporates retail at the ground floor.

SITE 9: Renishaw Site 1 – Land Rear of Haw Street / Market Street, Wotton-under-Edge, GL12 7AQ	
ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located at the rear of Haw Street and is sited to the rear of retail premises which front onto both the High Street and Market Street. The Chipping Car Park is sited to the south east of the site.
Site area / size	0.51 ha
Existing land-uses	The northern half of the site previously accommodated a factory unit but this has since been demolished and is now a vacant site. In the southern end of the site, there is a builders merchants and associated offices.
Adjoining land-uses	Adjoining the land to the west are residential properties fronting onto Haw Street as well as those which lead off from the Chipping car park which is sited to the south east (74 spaces). To the east and north of the site are retail properties that front onto the High Street and Market Street with typically storage, offices or residential above.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site falls within the wider housing designation of Site Hg18a in the Local Plan, adjoins the town centre boundary and falls within the Wotton-under-Edge Conservation Area.
C. ACCESSIBILITY	
Accessibility by private car	The northern half of the site is currently accessed from Haw Street which is narrow and has limited visibility. This access would require investment in order to accommodate any additional vehicle movements. The access into the Chipping Car Park is generally good although any conflict in terms of traffic merging into the car park would need to be addressed.
Accessibility by public transport	There is a bus stop on Haw Street to the south of the site which provides links to nearby villages as well as Dursley, Thornbury, Bristol etc. Generally though, the provision of public transport is limited.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The existing access of Haw Street is a constraint to development as this would need significant investment in order to improve visibility.
Parking	The site is large enough to incorporate any necessary parking provision and also links in with the Chipping car park to the south east of the site.
Impacts on neighbouring properties / land	The main impact would be on residential properties which bound the site to the west and south-west, east and north. However, the site is large enough for any such impact to be addressed through careful planning.
Visual Impact	The site lies within a Conservation Area and within the Cotswold AONB. Furthermore, there are a number of listed buildings which adjoin the site to the north, east and west. Therefore, any development will need to be sympathetic in terms of complementing the existing character of the area.
Servicing	Servicing is highly restricted from the existing access on Haw Street. The access off the Chipping car park would provide a more suitable option. Haw Street is also subject to on-street parking which restricts the flow of traffic and can experience congestion at key times. Service vehicles turning onto Haw Street may further exacerbate this.
Difficulties with displacing existing uses	Part of the site is vacant and therefore would appear ready for development. In the southern end of the site, there is an existing builder's yard which would need to be relocated or incorporated within any development.
Environmental impacts	The site may be subject to contamination and a full survey is recommended.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site, although partly falling within the town centre boundary is disjointed from the main retail area on Long Street and the High Street with no clear points of access. Therefore, significant retail development at this location could negatively impact upon the existing town centre. However, this does present a large brownfield site which is accessible to the town's services. A mixed use development of residential / commercial with an element of retail could be achieved providing a suitable access can be identified.
Development Costs	The main costs for this site are concerned with displacing the existing builders' yard which is a key employer in the town, identification of a suitable access and any necessary remediation measures.
Timescale	With part of the site cleared, there is opportunity for development in the short term.
Commercial Attractiveness	The site is attractive in terms of its size and location adjoining the town centre. However, it is relatively concealed from the primary and secondary shopping areas with no obvious links.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site could deliver an element of retail but it is not sufficiently linked with the town centre to provide a natural extension. Therefore, it is recommended that retail opportunities at the site are further explored but it is anticipated that limited retail development will be achievable.
Trade Draw	The site adjoins the town centre and could therefore, in principle, draw on both comparison and convenience uses.
CONCLUSIONS	
This is a large site, partly ready for redevelopment. However, there are clear barriers which limit its ability to act as a natural extension to the town centre. W suggest this option is further explored in the context of delivering a residential or commercial led mixed use development.	

SITE 10: Renishaw Site 2, Old Town, Wotton-under-Edge

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site lies to the south of Old Town and is currently occupied by Renishaw Plc. The southern end of the site backs onto retail premises which front Long Street, the primary shopping area.
Site area / size	0.76 ha
Existing land-uses	The existing land uses comprise of a factory building (Use Class B2) and ancillary offices which are occupied by Renishaw Plc. The site also incorporates a car park which is for the use Renishaw employees.
Adjoining land-uses	Residential properties adjoin the site to its west, north and east. To the south, the site is bound by retail premises with commercial/residential above. These units front onto Long Street.
B. PLANNING POLICY ISSUES	
Planning Policy Status	Allocated site EK28 under Policy EM3 which seeks to retain existing employment areas. The car park (southern end of the site) falls within the town centre boundary. The site is within the Conservation Area and contains Grade II listed buildings.
C. ACCESSIBILITY	
Accessibility by private car	The site is currently accessed from Old Town and provides a reasonably good access which serves the existing manufacturing use. This also provides access to the rear of the retail/residential properties on Long Street.
Accessibility by public transport	There is a bus stop located at the War Memorial at the eastern end of Old Town. This provides services to nearby villages and towns. The nearest train station is located at Cam and Dursley.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The site has an established access from Old Town, which is a main route through the town. This route can get congested at peak times.
Parking	There is existing car parking on the site which could serve a retail development should the existing use be relocated.
Impacts on neighbouring properties / land	The redevelopment of the existing factory building should not detrimentally impact on neighbouring properties providing it is of a relative scale. However, the increase in vehicular trips as a result of developing retail at the site could generate an impact.
Visual Impact	The site lies within the defined conservation area and Cotswold AONB. Furthermore, there are listed buildings within and adjoining the site to its south. Any redevelopment will therefore need to be sympathetic in terms of design.
Servicing	The site is currently serviced with regards to its manufacturing use.
Difficulties with displacing existing uses	The existing employment use is protected by Policy EM3 of the Local Plan. Therefore, there will need to be a robust case for displacing this use and the site may require marketing.
Environmental impacts	The site is not located within a defined floodplain. Investigations into contamination may be required.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site does adjoin the town centre. However, the links with the primary shopping frontage are limited and currently restricts the opportunity for adequate pedestrian linkages that would allow this site to come forward as a natural extension to the town centre. Intensive retail use at this site could impact upon the vitality and viability of the remainder of the town centre. However, providing Policy EM3 can be addressed, it could provide an opportunity for mixed use development incorporating an element of retail use.
Development Costs	The main costs involved would be the demolition of the existing buildings which would require conservation area consent. There are listed buildings on the site which the LPA may seek to retain.
Timescale	The site is currently occupied by a significant local employer and therefore it is unlikely the site will come forward in the short term. Therefore suggest that this is a medium to long-term opportunity.
Commercial Attractiveness	The site is attractive given its proximity to the town centre.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site could meet identified retail need, in particular convenience uses. However, this site does not represent an immediately obvious opportunity for a natural extension to the town centre and therefore further investigations are recommended.
Trade Draw	The town currently caters for day-to-day shopping needs of its residents, a wider niche trade draw and an element of tourism. This site could provide further trade draw for convenience retail.

CONCLUSIONS

The site is located close to the town centre and therefore investigations into its suitability for accommodating retail uses are recommended. However, without adequate links to the primary shopping area, there is a risk that development at this site could detrimentally affect the trade of the remainder of town centre.

SITE 11: Existing Police Station / Car Park / Health Centre, Stonehouse, GL10 2NA

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located at the northern end of Stonehouse town centre and is accessed from the High Street.
Site area / size	0.82 ha
Existing land-uses	The site accommodates a Council surface car park which serves the town centre (96 spaces), a Police Station which fronts onto the High Street at the western end of the site, an adjacent health centre set back from the High Street and a further doctors surgery at the northern end of the site.
Adjoining land-uses	To the north of the site are residential properties and a public house. To the south is a combination of retail / commercial properties fronting the High Street and residential units behind. On the western side of the High Street are retail / commercial properties with residential or storage above. The railway line adjoins the site along its eastern boundary.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site is not allocated for a specific land use within the Local Plan. The site falls within the town centre.
C. ACCESSIBILITY	
Accessibility by private car	The site is currently accessed from the High Street and the access is designed to accommodate a high number of vehicular trips which use the public car park and community facilities.
Accessibility by public transport	There is a bus stop outside of the site on the High Street. This provides services to Stroud as well as other villages and towns. The railway station is within walking distance to the south of the site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The access to the site would appear capable of serving additional development. The site has good links with public transport.
Parking	There is parking for 96 spaces on the site which are used by town centre shoppers and visitors. It is recommended that this allowance is assessed to see if this level of parking is required for the town centre and whether it needs to be provided at this site.
Impacts on neighbouring properties / land	There are residential properties which adjoin the site to its north and south which may be impacted by any future development. However, the site would appear large enough to offset this through appropriate siting of any development.
Visual Impact	The site is typically level and is screened to the east by the railway line. The doctors surgery building in the northern section of the site is Grade II Listed and therefore will need to be preserved. Furthermore, any development in the remainder of the site will need to be sensitive to the setting of the Listed Building.
Servicing	The access would appear suitable for accommodating servicing vehicles and the site is large enough to include a specific servicing area.
Difficulties with displacing existing uses	The site currently accommodates community uses in the form of a health centre and Police Station and therefore these uses would either have to be relocated or accommodated on site as part of any redevelopment. It is recommended that this is explored further alongside assessment work into town centre car parking.
Environmental impacts	The railway line runs to the east of the site and therefore potential acoustic mitigation measures may be required.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site lies within the town centre and would therefore be suitable, in principle, for accommodating additional retail provision. However, depending on whether alternative sites are available and there is a continued need, the site may also need to retain an element of car parking and community uses.
Development Costs	There are no abnormal costs identified at this stage.
Timescale	The site is currently occupied by various community uses and taking into account the time it would take to relocate / redevelop these uses, it is likely that this site would not come forward prior to medium to long term.
Commercial Attractiveness	The site is in an attractive location, within the town centre. However, there are a number of constraints (presence of listed building, community uses etc) which are detrimental to its overall commercial attractiveness.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	The site has the ability and is in the right location to meet identified retail need in the form of either convenience or comparison provision.
Trade Draw	The site is well served by public transport and is therefore capable of attracting local trade draw for day-to-day shopping needs.

CONCLUSIONS

The site is in a highly accessible location within the defined town centre and has the potential to provide additional retail provision subject to further investigations into the need to accommodate the range of existing community uses.

6.11 The opportunities offered by these sites are now taken forward into an assessment of the broad policy options for retailing in Stroud District.

Different Approaches to Retail Development in Stroud District: The Options

6.12 Having identified the potential expenditure capacity/demand which exists within the Stroud District area, considered qualitative needs, and reviewed the health of existing centres this section of the study identifies the policy options for development. This will involve identifying different centre's strengths/weaknesses, opportunities and threats. The outcome of this exercise will be to identify what scale and form of development is likely to be supportable in different locations, including the scope to enhance the role of existing centres, to expand or create new centres and where appropriate, to plan for diversification and manage decline.

6.13 A key priority of developing and evaluating policy options is to understand the implications of alternative policy options. For example, where potential exists to expand the role of a particular centre, and to seek to increase its market share and reduce 'leakage' of expenditure, it will be necessary to understand the implications for neighbouring centres in terms of their current or potential role. If there is insufficient expenditure capacity or demand to support development of all the identified opportunities, it may be necessary to review the pros and cons of each option, and to weigh their relative merits in reaching a decision. This may involve choices between the development of one opportunity or another, or may lead to a strategy to phase new development, and to identify priorities.

6.14 As can be seen from the contents of Sections 4 and 5 of this study, there are significant differences between individual settlements in Stroud District, which are also borne out by the research findings. Therefore, different characteristics must be reflected in any options analysis and strategy development. There are also differences between the types of shopping in the same settlement and the options analysis must take account of this.

6.15 Therefore, our policy options analysis examines the five largest settlements (Stroud, Cam/Dursley, Nailsworth, Wotton and Stonehouse) in turn and, as a result, will lead to individual options being recommended for each centre and different types of retailing within that centre. Drawing these options together provides the Council with a district wide retail strategy, which considers the inter-relationships of the five largest settlements. In particular, the options analysis considers convenience and comparison retailing in each chosen settlement separately.

6.16 It is not the intention of the policy options analysis to exclude the examination of the smaller centres of Berkeley, Minchinhampton and Painswick. However, based upon the results of the town centre health checks, plus the quantitative and qualitative assessments and the potential spatial development strategies outlined in Stroud District Council's February 2010 Alternative Strategies consultation documents, these settlements have a more clearly defined secondary role within the retail hierarchy in the District. Therefore, we provide a broad overview of the policy options available to Berkeley, Minchinhampton and Painswick later in this section.

6.17 Within our assessment of the potential alternative policy choices, we have taken into account each centre's strengths/weaknesses, opportunities and threats in order to develop potential options. The options which have been identified are individual to each centre and comprise alternative scenarios, such as: identify and plan for new development, or concentrate upon existing floorspace stock.

6.18 The assessment of potential options for each settlement is based upon a structured and consistent matrix which takes account of national and local policy objectives and priorities. The evaluation framework is outlined below.

Table Q: Policy Options Assessment Framework

Indicator	Response
The ability to address qualitative indicators and geographical areas of deficiency	o Does it help to fill any identified deficiencies or gaps in existing provision? o Does it meet any location specific needs – deprived area considerations o Is there an appropriate level and distribution of shopping facilities? o Does it promote consumer choice and competition? o Does it improve the quality of provision?
Impact – Policy EC16 of PPS4	a) Impact of the proposal on investment b) Impact on town centre vitality and viability, including local consumer choice and the range and quality of the retail offer c) Impact on allocated sites outside of town centres d) Impact on in-centre trade/turnover and on trade in the wider area e) (in the context of in centre or edge of centre schemes) the appropriateness of the proposal in terms of scale
Availability of potential development sites and/or the ability to improve existing premises	o Is there land/sites available to accommodate allocation development? o Do the sites which are available comply with the sequential approach to site selection? o What forms and scale can be accommodated?

Indicator	Response
	o What is the ability of the existing floorspace stock to accommodate identified needs? Can existing premises be easily upgraded?
Accessibility to existing and future population, plus promotion of sustainable travel	Will this scenario deliver retail floorspace which is accessible to both the existing population in Stroud District, plus new housing development in the main towns? Will the content of this scenario help to encourage sustainable patterns of travel? For example, will the proposed retail provision be accessible by a choice of means of transport? What will the effect of this scenario be on the length of shopping trips in the Stroud District area, particularly for food shopping trips?

6.19 Clearly, the policy options assessed here for each settlement are not intended to be an exhaustive list of all strategy options. Moreover, the conclusions reached in relation to the performance of each option against the evaluation criteria depend to some extent (for some settlements) on the future decision to allocate growth across the District. In any event, local planning authorities will invite alternative proposals during consultation on development plan documents, and it is likely that consultation with stakeholders will be the most appropriate opportunity to explore additional options.

Stroud – Evaluating Alternative Policy Options

Stroud is the most successful town in the District in terms of financial performance, attracting significant levels of both convenience and comparison goods retail expenditure. The town's catchment area extends across the District, and influences the market shares of shopping facilities within the other smaller towns in the District. The town has varying levels of retention in terms of comparison goods shopping with low levels of shopping trip retention and gaps in provision for certain types of goods. There is little evidence of overtrading and/or congestion within the comparison goods sector in Stroud and key issues for consideration in this options analysis will be: does Stroud remain the best location for the potential growth in non-food floorspace within the District? And should this growth be in the form of new floorspace and/or refurbished floorspace?

Having regard to convenience goods floorspace, Stroud has three large foodstores supplemented by a range of other provision. The trading performance of existing facilities varies across town and there is no clear evidence of consistent overtrading and congestion across the whole of the convenience sector. Therefore, in light of the existing level of provision, the key issue will be: is there a need to allocate for further convenience floorspace in Stroud?

As a context for this analysis, our quantitative assessment indicates a capacity of between 700-900sq m net of additional comparison floorspace by 2015, rising to 3,900-4,400sq m net by 2026. For convenience floorspace, the 2015 capacity figure is circa 500sq m net and the 2026 capacity estimate is between 1,100-1,500sq m net although these levels may well be reduced as a result of the introduction of the Sainsburys store in Dursley.

Indicator	Response
The ability to address qualitative indicators, geographical areas of deficiency and effect upon quantitative capacity	We have found that there is a good qualitative level of convenience retail provision within Stroud as a whole and therefore the option of not identifying locations for additional convenience floorspace is unlikely to lead to any areas of deficiency. Our quantitative analysis indicates potential future capacity based on the continuation of current shopping patterns, although the identified capacity may well be reduced as a result of the effect of the introduction of the Sainsbury's store in Dursley. Such a scenario adds weight to the option of not identifying further convenience floorspace provision in Stroud. The one area where potential improvements can be made is the provision of a greater amount of convenience retail floorspace with<u>in</u> the town centre and this should be a consideration when assessing the appropriateness of town centre sites. Having regard to the comparison retail provision, there is a qualitative justification for improved provision and the identification of land for this purpose is likely to be supported by prevailing policies. However, with little evidence of overtrading and the results of the town centre health check showing the need to improve existing facilities, particularly given the increasing number of vacancies in the centre over recent years, there is no immediate quantitative capacity. Instead, capacity is likely to arise in the future.

Indicator	Response
Impact – Policy EC16 of PPS4	There is a concern that further significant levels of convenience and comparison goods floorspace in out-of-centre locations in Stroud have the potential to undermine the health of the town centre. The performance of the town centre, particularly its comparison goods sector, is in need of reinforcement, as evidenced by the rising number of vacancies within the centre. Therefore, having regard to impact criteria, improvements in convenience retail floorspace provision should be focused within and around the centre. The same conclusion is reached in relation to comparison goods retailing, with the centre vulnerable to out of centre retailing and further leakage of trips to larger centres in Gloucestershire and Bristol. In addition, it is important to have regard to the impact of new provision in Stroud on the other main settlements in Stroud District. For convenience shopping, significant levels of additional floorspace have the potential to impact upon the delivery of floorspace in other settlements, such as Stonehouse and (to a lesser extent) Wotton, where stronger qualitative, quantitative and accessibility issues arise.
Availability of potential development sites and/or the ability to improve existing premises	A number of locations have been identified in and around the town centre as potential development sites. Land at Cheapside & Wallbridge offers a reasonably central location, but suffers from poor linkages with the core town centre area. As a consequence, we do not consider that this site offers a primary candidate for significant levels of retail provision, although retail uses can be provided as part of a wider mixed use scheme and there may be opportunities for retail development between this site and the core town centre area which would reinforce linkages between these two areas. The London Road car park offers a potential development site, although the removal of car parking could be detrimental to town centre accessibility and attractiveness and replacement car parking may well need to be found. Land has also been identified adjacent to the Merrywalks Shopping Centre. This area suffers from poor existing linkages with King Street and improvements would be needed. This area has the potential to accommodate an extension to Merrywalks Centre, although existing uses will need to be relocated and this is likely to be a longer term redevelopment project. Finally, the area including and surrounding the Police Station (and surrounding car parks) including Parliament Street also offers the potential to extend the core shopping area eastwards from High Street. All of this site may not be capable of redevelopment in order to keep some car parking and to accommodate the change in levels across the site, although there is potential for new large retail units to be provided. Overall, the Police Station and Merrywalks sites will offer the best potential for the introduction of new retail floorspace, particularly non-food floorspace, into the town centre.

Indicator	Response
Accessibility to existing and future population, plus promotion of sustainable travel	The option not to allocate additional convenience retail floorspace within Stroud is supported by accessibility criteria in order to protect the delivery and retention of accessible retail floorspace elsewhere in the District. The objective of maintaining and diversifying the existing comparison floorspace offer and, where appropriate, expanding the amount of floorspace is also supported by accessibility and sustainability criteria where it is able to clawback trips which are being lost to surrounding larger centres. Clearly, there must be realism over the level of clawback which can be achieved although a strategy which seeks to take advantage of opportunities to improve the range of provision in Stroud should be supported.

Nailsworth – Evaluating Alternative Policy Options

Nailsworth town centre is considered to provide a good, albeit modest, retail and service offer. The town has an attractive environment, with lower than average vacancy levels and a niche retail offer that attracts people from across the District.

Alongside the issues arising out of the health check, we have found that the town centre is able to retain the majority of top-up food shopping trips and almost two-thirds of main/bulk food shopping trips. Within the convenience sector, we have not found clear evidence of significant levels of overtrading within existing stores and there remains potential to retain higher levels of convenience expenditure. Based on the continuation of current shopping patterns, future quantitative capacity for additional convenience goods floorspace in Nailsworth is between 500-600sq m net by 2026.

Like other settlements in the District, Nailsworth has modest levels of retention of comparison shopping trips, although the quality of its retail offer is also attractive to residents of other parts of the District. Based upon alternative strategies outlined in the February 2010 SDC Core Strategy document, there is limited variance in future population growth levels in Nailsworth and therefore the key issue for this options analysis is whether there a need to identify locations for additional retail floorspace in Nailsworth and, if so, what additional floorspace should be planned for? Based on the continuation of current shopping patterns, there is a quantitative capacity for between 300-400sq m net of additional comparison goods floorspace by 2026.

Indicator	Response
The ability to address qualitative indicators and geographical areas of deficiency	There is the opportunity to address qualitative indicators of retail and service provision in Nailsworth through the identification of sites within the town centre. We do not consider that there is a need to identify a location for a large new convenience retail use although there may be more appropriate opportunities to expand existing provision. Within the comparison sector, the health of the centre benefits from its existing quality retail offer and opportunities to expand and reinforce this offer should be explored.
Impact – Policy EC16 of PPS4	The identification of sites within the town centre (such as the area between Old Market and Bridge Street/Fountain Street – see below) has the potential to have a positive impact upon the health and performance of the centre. We have identified that there are opportunities for improvements in local consumer choice to reinforce the existing range and quality of the retail offer. Nailsworth town centre benefits from the close proximity of existing facilities in the town centre (with a lack of out of centre retailing in the town) and keeping this concentration of facilities should be a core aim within any future development. Out of centre locations should be resisted where they will undermine the attractiveness and financial performance of the centre and the delivery of town centre sites. A key indicator regarding impact will be the scale of provision which can be provided. Consideration has been given to the continuation of the centre's existing small unit size structure or a strategy for an expanded centre which seeks to

Indicator	Response
	attract national multiple retailers. Based on retailer demand and the physical capacity of potential development sites (see below), the former approach is more appropriate for the town.
Availability of potential development sites and/or the ability to improve existing premises	The main town centre site which has been identified through the course of this study has been land between Old Market and Fountain Street/Bridge Street. This area lies in the heart of the centre and reorganisation of this area has the potential to connect different parts of the centre in a better form. This area currently accommodates surface level car parking and the bus station along with a range of retail and commercial uses. The car parking area is clearly well used, and re-provision of this and the bus station may be required in any redevelopment. There is an opportunity to provide additional retail and commercial frontages along Old Market to reinforce the southern end of Old Market. Either as part of this area, or via an extension to the existing Morrisons store, opportunities should be explored which provide for an expanded convenience retail offer in the town centre.
Accessibility to existing and future population, plus promotion of sustainable travel	The provision of additional town centre facilities, via the identification of the area between Old Market and Bridge Street/Fountain Street, has the potential to promote sustainable travel and accessibility characteristics. Such provision can reinforce the local retail and service offer of Nailsworth and, whilst new provision is unlikely to be large-scale, it can reinforce the existing quality and attractiveness of the centre. Accessibility and sustainability can also be improved if a greater proportion of convenience shopping trips is retained within the town.

Stonehouse – Evaluating Alternative Policy Options

With regard to existing shopping patterns and trading performance, we have found no clear evidence of significant overtrading within stores in Stonehouse and should current shopping patterns continue then we envisage no significant growth in the quantitative capacity of the town. However, it should be noted that there is leakage of both food and non-food shopping trips from Stonehouse, primarily to nearby Stroud, and this has an important influence on future capacity particularly when coupled with the high growth scenarios for the Stonehouse area suggested by SDC's February 2010 Core Strategy document.

In addition, whilst the leakage of non-food expenditure would appear inevitable, providing for a greater proportion of food shopping trips locally would appear to be a potentially reasonable aspiration. As a result of the above, a number of policy choices require evaluation, in particular: is there a need to identify locations for additional retail floorspace in Stonehouse and if so, what additional floorspace should be planned for and in what location?

As a context for this analysis, our quantitative assessment has indicated that, based on the continuation of current shopping patterns, there would be capacity for between 200-400sq m net of additional convenience floorspace by 2026 and 400-700sq m net additional comparison floorspace in Stonehouse by 2026.

Indicator	Response
The ability to address qualitative indicators, geographical areas of deficiency and effect upon quantitative capacity	The ability to improve the qualitative aspects of provision within Stonehouse is likely to always be affected by the influence of Stroud, due to its proximity. The potential for claw back of expenditure exists (via an increase in the town's market share), although this is likely to be focused upon the convenience retail sector and dependant on the level of growth directed towards the Stonehouse area. If lower levels of growth are planned for Stonehouse, then available expenditure is unlikely to rise to an extent which supports significant levels of additional provision (required to compete with stores in Stroud) without significant impact upon existing provision. Under this scenario, it is likely that the focus will remain on supporting existing provision within the town centre. However, under the higher growth scenarios tested within our quantitative analysis, there will be significant levels of population growth (25% increase) and a significant increase in available expenditure from the local area (40% growth between 2010-2026). Under this scenario there is a case for improving retail provision in Stonehouse via an expansion of the facilities in the town centre, in order that the volume of local trips which can be retained locally is maximised.

Indicator	Response
Impact – Policy EC16 of PPS4	Existing retail facilities in Stonehouse are considered to perform at moderate levels at present, although there is potential to improve consumer choice in the local area. Where locations within (or possibly on the edge of) the town centre can be found there is potential for a positive effect upon the health of the centre. However, care must be taken when addressing qualitative indicators via attempts to accommodate significant levels of new development in order to increase the town's market share. For example, under lower population growth scenarios for Stonehouse insufficient expenditure may be available to accommodate existing and new development which could lead to significant adverse impacts upon parts of the town centre. In addition, significant new levels of retail floorspace could be out of scale within the role and function of Stonehouse where there is little or no population growth. However, provision of further levels of retail floorspace (in the town centre) are likely to perform better against PPS4's impact criteria if there is significant population growth, based upon the need for local consumer choice and the range of retail offer.
Availability of potential development sites and/or the ability to improve existing premises	The existing police station site and adjacent health centre premises have been identified as a potential development site to accommodate new retail provision. Based upon our own analysis, a significant retail allocation in Stonehouse is only likely to be required where significant growth is planned for the town, which is reinforced by the low level of vacancies within the centre and therefore the limited ability to improve choice in provision through the existing floorspace stock. Nevertheless, the police station/health centre site is a good opportunity to expand the retail offer of the town centre and we consider that Stonehouse should remain the focus for shopping facilities in the local area. The redevelopment potential of this site is dependant upon the relocation of the police station and health centre uses, the latter of which provides an important element of the town centre offer.
Accessibility to existing and future population, plus promotion of sustainable travel	Stonehouse provides an accessible location for its existing population and opportunities to realistically improve the level of provision will be supported from a sustainability perspective. If significant levels of residential development are planned for the Stonehouse area in the Stroud Core Strategy, we consider that, in order to ensure good levels of accessibility for the existing and future population, there is support from an accessibility/sustainability perspective for increases in shopping provision, particularly convenience retail provision. This would enable the future population to make shorter shopping trips and reduce the reliance on the need to visit Stroud for all types of shopping and service provision.

Dursley & Cam – Evaluating Alternative Policy Options

There has been a long-standing identified need for improved convenience shopping provision within Dursley which has now been rectified by the opening of the Sainsbury's store on Castle Street. As a consequence of the introduction of this store, immediate quantitative and qualitative convenience needs in the local area have been satisfied. However, our quantitative analysis suggests that further capacity could arise later in the development plan period. Therefore, this assessment will consider whether there is a case to identify additional convenience goods floorspace beyond the new Sainsbury's store in Dursley?

Furthermore, this assessment will also consider the requirement to identify locations for additional comparison floorspace in Cam and Dursley. This consideration will have regard to the loss of comparison uses from Dursley town centre in recent years and the rise in vacancy levels within the centre.

In addition, this area is unique in that Cam and Dursley are two towns with separate identities although contained within one large urban area. Dursley has a defined town centre and Cam has a defined Local Centre in the adopted Local Plan. Both centres contain important retail and service facilities and therefore there is a need to consider how the LDF Core Strategy should address the balance of retailing and town centre use between Cam and Dursley.

Indicator	Response
The ability to address qualitative indicators and geographical areas of deficiency	When considering the need to identify and allocate sites for retail development, we have had regard to the findings of our qualitative and quantitative assessments along with the PPS4 requirement to allocate sufficient sites in development plan documents to meet at least the first five years identified need. In this instance, significant expenditure capacity is unlikely to arise until after 2021 and therefore we see no overriding need to allocate further land for convenience retail uses. When considering the longer term needs of the local area, this will depend to a large extent upon the residential growth strategy chosen by SDC's Core Strategy. Where higher levels of growth are directed towards Cam/Dursley, future longer term improvements may be required although at the present time it would appear that these will be small scale and are likely to be extensions to existing stores. Therefore, we see no need to identify additions to the convenience floorspace stock in Cam and Dursley at this stage. Having regard to comparison retail floorspace, there are opportunities for qualitative improvements in provision. Such improvements could be via the provision of new floorspace or support for the existing floorspace stock. In addition, consideration will need to be given to the ability for Cam/Dursley's market share to increase over the LDF period. We consider that the most appropriate strategy for comparison retailing in Dursley is to concentrate upon the floorspace

Indicator	Response
	stock within the existing centres. In other words, this should mean not providing additional space in the town but instead focusing attention upon refurbishing and redeveloping existing property. This is based upon the following factors: the lack of overtrading within existing provision; the increasing number of vacancies, which should be a key priority for the Council; and the lack of demand for additional space. In terms of geographical aspects of provision within the Cam and Dursley area, the location of additional provision (if warranted to support growth of the urban area) will ultimately be dependant on where new residential development is placed, although Dursley will be the first choice location.
Impact – Policy EC16 of PPS4	The new Sainsbury's store in Dursley is likely to have a significant influence upon shopping patterns in the local area and it is our view that the impact of this store upon the performance of the defined centres in Cam and Dursley should be monitored (through regular health check and financial performance updates) over the coming years to establish the future health of both Dursley town centre and Cam District Centre. As outlined above, the identification of additional retail floorspace within Cam and Dursley is only likely to occur if higher levels of residential growth are directed to the local area and this is only likely to occur later in the development plan period. The impact of new provision should be assessed as and when the need arises, taking into account the trading effects of the Sainsbury's store in Dursley. Given the increase in vacancies over recent years in Dursley, it is clear that the town centre would be sensitive to the impact of new floorspace, which gives further justification to the need to concentrate upon maintaining and enhancing the existing floorspace stock.
Availability of potential development sites and/or the ability to improve existing premises	Beyond the development of the Castle Street site for Sainsbury's, two further locations have been identified in Dursley and Cam. In Dursley, land to the rear of Parsonage Street has been identified although this is unlikely to offer a short term deliverable development site for comparison retail floorspace. This is reinforced by the characteristics of this site which are likely to provide a similar level of accommodation to that already present in the town centre. As a consequence, we consider that there is little immediate need to identify this site for retail development and, in contrast, efforts should be concentrated upon protecting and enhancing the health of existing businesses. Within Cam, a site adjacent to the existing District Centre has been identified. This has the potential to improve and expand the centre in order to accommodate a wider range of services. There are opportunities to introduce new retail and service units into the centre along with the potential to expand the existing Tesco store. The phasing and delivery of this site will be dependant upon the level and distribution of housing growth across the Cam and Dursley urban area.
Accessibility to existing and future population, plus	The introduction of the Sainsbury's store in Dursley, to supplement the existing Tesco store in Cam, provides good levels of accessibility for the local population to convenience retail uses. Both stores are located in close proximity to

Indicator	Response
promotion of sustainable travel	other retail and service uses and promote sustainable travel. Having regard to comparison and other service uses in Cam and Dursley, the ability to attract new businesses will promote sustainable travel although equal emphasis should be placed upon protecting the health of existing businesses (through resisting inappropriate development elsewhere and working with existing owners and occupiers to ensure that the planning system allows the centre to respond to changing needs and requirements) in order to maintain a range of provision in the town and district centres.

Wotton-under-Edge – Evaluating Alternative Policy Options

Our assessment of the health of Wotton suggests a well performing centre which is popular with the local community and has a good approval rating. Vacancies within the centre have increased slightly, although remain at low levels. Our assessment of shopping patterns has shown that existing convenience and comparison retail facilities in Wotton trade well and there is evidence of overtrading and congestion in the convenience retail sector. This overtrading, coupled with the leakage of convenience shopping trips to other settlements, suggests that one policy option which should be explored is the provision of new convenience goods floorspace. Based on the results of the town centre health check, market demand survey and quantitative assessment, the requirement to plan for additional comparison goods floorspace within Wotton appears less strong although the options for provision should also be explored.

Indicator	Response
The ability to address qualitative indicators and geographical areas of deficiency	There is an opportunity to improve the level and range of convenience floorspace within Wotton and, leaving other factors aside, this would enhance qualitative indicators. There also appears to be a modest level of potentially surplus expenditure to accommodate new provision, although the existing 'surplus' identified by our quantitative analysis may be eroded to a certain extent by the opening of the new Sainsbury's in Dursley. The option not to plan for increased provision would likely lead to a continuation of the existing situation with out-migration of convenience shopping trips and high levels of trading within existing stores. On balance, an option which seeks to improve qualitative aspects of provision is recommended, although this will ultimately be dependant on scale, impact and site suitability considerations, plus the impact that the new Sainsbury's store in Dursley has on local trading patterns. Within the comparison retail sector, there are opportunities for improved choice and competition although the ability of this indicator to support significant levels of growth appears to be limited, given the role and function of Wotton and the lack of significant demand for new space.
Availability of potential development sites and/or the ability to improve existing premises	Two development sites have been identified for the purposes of this study: land to the rear of Long Street and land between Market Street and Haw Street. Both are in edge of centre locations, although they are separated from the core retail area. The land to the rear of Long Street suffers from poor frontage on to the core shopping area and whilst a link is available improvements would need to be made in order to better integrate this site with the remainder of the town centre. This site also accommodates an existing use and its availability will be dependant on relocation. The site between Market Street and Haw Street, which is generally vacant, also suffers from similar visibility issues and

Indicator	Response
	has poor vehicle and pedestrian access. Apart from access, the main issue to be tackled with this site is its potential separation from the core retail area, with a concern that it could act as a stand along shopping destination. However, in addition to these sites, the potential to expand existing convenience retailers (such as Tesco Express and Co-op) should also be explored, as this may be a more suitable option with concerns over the impact and the location of new provision. The Co-op store is the more likely candidate for expansion, utilising the car parking area to the rear. Such an expansion is not without constraints, although is an option which should be investigated.
Impact – Policy EC16 of PPS4	The provision of additional convenience retail floorspace has the potential to provide an 'in principle' boost to the health of Wotton, although the actual impact will be dependant on the scale and location of provision. The current performance of existing stores appears to be good and capable of withstanding modest levels of additional provision which can add to choice and competition in the town centre. However, given the size of Wotton and existing provision, large scale development is likely to have significant impact upon existing retailers which may not be the most appropriate strategy to be pursued for the town. Such an impact could be magnified when it is placed upon either of the two identified edge of centre sites and adequate linkages are not provided. One scenario, which may lessen potential negative impacts, will be to expand existing convenience retail units. Having regard to comparison retailing in Wotton, the size and range of provision dictates that new provision will be small scale and should be located within the town centre in order to meet impact criteria. As a consequence, the focus in the first instance should be on seeking to reoccupy existing vacant units and exploring the ability to improve the existing floorspace stock.
Accessibility to existing and future population, plus promotion of sustainable travel	The option which aims to pursue a modest and deliverable expansion of retailing in Wotton is supported by accessibility and sustainability criteria. The ability to claw back trade will however be constrained by the level and type of facilities which can be attracted to Wotton, the availability of accessible town centre sites and the need to protect existing businesses.

6.20 Having regard to the preceding options analysis, a number of conclusions can be drawn in relation to the preferred options for retailing in each of the principal settlements.

Stroud

6.21 Stroud, by some considerable margin, has the best range of convenience and comparison retail facilities in the District. Foodstore provision is considered to be good, albeit orientated to locations outside of the town centre. Having considered alternative policy choices, we do not consider that there is a significant qualitative and quantitative case for actively planning for additional convenience floorspace provision within Stroud, although where town centre sites are brought forward the potential for including convenience floorspace provision should still be explored. Our conclusions regarding convenience retailing in Stroud take into the account the need to allow other settlements in the District to maintain and, where appropriate, enhance their own provision, which could be hampered by the further polarisation of provision within Stroud.

6.22 Beyond the local and niche roles which other (smaller) towns in the District play in terms of comparison shopping, Stroud is the only settlement within the District likely to attract a wide range of comparison goods retailers, including national multiples. The level of vacancies within the centre has been growing in recent years and is sign of the pressure that the town faces when competing with both out of centre provision in the town and the influence of Gloucester, Cheltenham, Cirencester and Bristol. As a consequence, realism will need to be employed regarding the potential scale of comparison retail provision which can be attracted to the town. Whilst the canals restoration should act to attract inward investment to the area, this realism will also need to take into account the need to protect the health of the existing floorspace within the town centre and reduce the number of vacancies, as well as offering opportunities for new retailers to locate in Stroud (where the existing stock is incapable of meeting demand).

6.23 On the basis of the locations identified for this study, the two sites which offer the best potential are land at Merrywalks and the existing police station at Parliament Street. Neither site presents a straightforward redevelopment proposition, with the need to relocate existing uses, although both offer the best potential to extend the primary shopping area in the town. We consider that both areas should be identified as potential locations to expand the town centre and where further work is required to clarify their potential contribution. Whilst there is no immediate need to redevelop these sites, they offer the best potential to accommodate the comparison and (to a lesser extent) convenience floorspace needs over the LDF period. Indeed, as the Practice Guidance accompanying PPS4 notes, complex town centre sites can take 10-15 years to bring forward and there is a need for proactive assessment of town centre sites. We consider that identification of these areas now is an important priority for the Council, in order to highlight the long term potential for the town centre and also to strengthen the Council's ability to resist out of centre proposals.

Cam & Dursley

6.24 For a number of years, the need for additional convenience retail floorspace provision in Dursley has been at the forefront of the Council's retail strategy. The new Sainsbury's store in Dursley will meet the identified qualitative and quantitative deficiency and will provide a modern foodstore which has the potential to attract additional visits to Dursley town centre via linked trips. Having considered the alternative policy choices, we do not consider that there is sufficient justification for any further allocations for convenience floorspace within the Dursley and Cam area. There may be a need to expand provision later in the LDF period if significant levels of housing growth are directed to this area, although there is no need for early delivery of additional convenience floorspace. With regards to comparison goods retail floorspace, there is a qualitative need to improve provision, although there is a lack of suitable sites in Dursley, the demand for additional space is likely to be limited and there is a need to deal with the increasing number of vacancies in Dursley.

6.25 We have also considered the policy options regarding the relationship of the defined centres in Cam and Dursley. At present, Dursley attracts town centre status and Cam attracts District Centre. Based on their existing retail and service use content, we consider that these classifications are appropriate and are likely to remain so over the course of the LDF period. However, depending on the level of new residential development which is placed in the Cam area over the LDF period, there may be a case for identifying an extension/expansion of the centre in order to better serve the day-to-day needs of the local population. There is an area of land which is appropriate for this purpose.

Nailsworth

6.26 Whilst relatively small-scale, Nailsworth town centre is considered to offer an important retail and service offer within the District. The centre serves both the local population and also attracts visits from across the District and evidence indicates the centre has a good demand from retailers and other businesses. Nevertheless, there are opportunities for realistic qualitative improvements to be made, to both its convenience and comparison retail offer, although in order to retain the health of the centre, these improvements need to be undertaken within the existing town centre boundary. The area between Old Market and Fountain Street/Bridge Street offers the best potential for new retail, service and commercial floorspace to be provided. Redevelopment proposals will need to consider its impact on town centre car parking provision and the need to relocate some existing businesses, although we consider that this site should be identified as being suitable for mixed use development including a mixture of Class A uses on the ground floor although the emphasis should be on providing for more Class A1 uses. Having regard to convenience goods shopping, the existing Morrisons store is able to retain a reasonable proportion of main and top-up food shopping trips although, due to its size, leakage to the larger supermarkets in Stroud does occur. We have considered the potential, from a quantitative capacity and impact viewpoint, to provide an additional foodstore, although this is unlikely to be acceptable and therefore additional provision within Nailsworth is likely to be additional small scale improvements, including extensions to existing stores.

Wotton

6.27 Our assessment has shown that Wotton town centre offers a popular and well used destination for the local population. The convenience provision within the centre appears, in particular, to be well used and evidence suggests that the Co-op store is overtrading. We have therefore considered alternative policy choices regarding the identification (or not) of additional retail floorspace in Wotton. In principle, we consider that there is merit (and policy support) in improving the level of convenience retail provision in Wotton, which should be a starting point for the analysis, although it should be borne in mind that part of the 'capacity' which has been identified for Wotton may be removed by the new Sainsbury's store opening in Dursley. Nevertheless, the aim of providing accessible retail facilities remains.

6.28 Two choices exist: identification of new retail sites or expansion of existing facilities. However, the new sites which have been identified through this study exhibit a number of constraints which will need further investigation. For example, both are separated, to some degree, from the core retail area and further investigation would need to be undertaken to ascertain whether better linkages can be provided. In addition, coupled with their location, the scale of new provision in Wotton needs careful consideration. For example, too large a store, which is not within the existing core retail area, could be counter-productive as it would have a significant adverse effect on existing stores without the necessary balancing positive benefits. An alternative option, which is less likely to exhibit these negative impacts and should be explored by the Council, is the extension of existing facilities (although we acknowledge that this may be constrained to some degree by the built fabric of the town centre).

Stonehouse

6.29 The preferred option for retailing in Stonehouse will depend to some extent on whether (and if so, the scale of) residential development as set out in the Alternative Strategies consultation documents is planned for the surrounding area. Where low levels of development are planned, we see no significant need to plan for a significantly expanded range of town centre and retail facilities, as the existing floorspace stock (perhaps with some smaller scale improvements and additions) is likely to be able to accommodate the needs of the local population. However, where significant levels of housing development are planned for Stonehouse and areas to the west (closer to the M5) we consider that Stonehouse has an important role to play in providing a focus for the shopping needs of the expanded community. Population growth of 25% and expenditure growth of 40% up to 2026 on its own has the potential to boost expenditure capacity. In addition, there is existing leakage of convenience shopping trips from the Stonehouse area (to Stroud and elsewhere) which will increase significantly in volume if large residential growth occurs.

6.30 Therefore, we see merit in the Council planning for an increase in town centre facilities should large residential growth be directed to the Stonehouse area. The police station/health centre site is one potential centrally located development opportunity to accommodate retail and town centre growth, although new sites for these valuable uses will need to be found. Given that the need for increased retail and town centre facilities will not be immediate, we consider that the Council gives further detailed consideration to opportunities which are available within the town centre to accommodate growth over the medium term.

Berkeley, Minchinhampton & Painswick

6.31 Within Minchinhampton, Berkeley and Painswick there is limited retail provision, focusing upon day-to-day convenience shopping needs, niche services and food and drink uses. Opportunities for expansion of the retail floorspace stock within these centres is limited, particularly within the centres of Minchinhampton and Painswick and, due to competition from surrounding larger settlements, the policy focus for these centres will be on protecting and enhancing existing provision and, where appropriate, encouraging new businesses to locate in the town.

6.32 The shops and services within Painswick serve not only the local population but also attract visitors to the wider Cotswolds area. Uses include niche comparison retailers, a convenience store and food & drink outlets. This is also, to some extent, true for Minchinhampton. A number of factors affect the performance of these towns as a destination, including: car parking provision, the loss of retail and service units to residential use and the ability to provide additional space to meet the needs of businesses. Policies to deal with the loss of retail accommodation are discussed later in this section of the report, although we recommend that the Council's policy focus for Painswick and Minchinhampton will be on protecting and enhancing existing provision and, where appropriate, encouraging new businesses to locate in the town.

Planning for New Centres within the Urban Extensions

6.33 Apart from the existing settlements in Stroud District, two urban extensions to Gloucester within the Stroud District administrative area are promoted through the draft RSS. One of these urban extensions, Hunts Grove, has already achieved planning permission and includes a modest amount of retail and service floorspace within a neighbourhood centre. The approved centre extends to 2,000sq m, including a 1,100sq m foodstore and other units of no more than 200sq m.

6.34 The other urban extension, if confirmed by the RSS, will provide a significant level of residential development (1,500 units) and we recommend that consideration will need to be given to the scope and extent of new retail and service provision within this area.

6.35 In order to ensure that retail provision is located where it can provide easily accessible facilities for the resident population, we consider that the decision on whether to identify a new centre or expand existing centres (or even retain the existing hierarchy) should be informed by geographical and accessibility factors. Given its importance, it is likely that convenience retail provision will form the basis for any new provision, supplemented by other day-to-day shopping and service facilities.

6.36 We set out below (not in any order of importance) a basket of factors which we feel may be appropriate for the Council to take into account when considering how to plan for new shopping/centre provision within planned urban extensions to Gloucester. Ideally, this assessment work should be undertaken with Gloucester City Council.

- Geographical distribution of retail floorspace. This can identify which areas are best/worst served by retail provision.
- Dominant shopping facilities, by area. Using shopping survey data, the analysis can identify which facilities may be attractive to the potential residents and can establish the distances which residents currently travel for convenience and comparison shopping.
- Walk-in catchments. It is vital that new residential development has easy and convenient access to retail facilities, especially convenience retail provision. Walking distances of 500 metres to 1km can be modelled to show areas which have good/poor accessibility on foot.
- Drive-time catchments. Given the dominance of car-borne journeys, particularly for bulk/main-food shopping trips, it will be important to model 5 minute drive time catchments from existing stores and centres.
- Public transport accessibility. The walk-in and drivetime catchments should also be accompanied by an analysis of public transport routes which can establish the proximity of residential areas to public transport routes which serve retail provision.

Review of Local Plan Policies and Town Centre Allocations, plus Town Centre, Primary and Secondary Retail Frontage Boundaries

6.37 In light of the publication of PPS4, there will be a need to revisit the retail and town centre policies within the adopted Local Plan in order to ensure that they are up-to-date and relevant to national planning policy guidance. These can be split into three areas: development control planning policies; town centre, primary and secondary shopping areas; and, definition of locally important impacts and impact assessment thresholds. We deal with each of these in turn below.

6.38 Alongside the definition of town centre boundaries plus primary and secondary shopping areas, a number of the policies in the town centres and retailing chapter in the Local Plan deal with the change of use or development within different parts of the town centre areas. There are individual policies for Stroud and the District/Local centres, plus policies which apply to the remainder of the other town centres in the District. When read as a whole, there are subtle differences between the policies (and supporting text) which apply to Stroud and the other main centres, which include the proportion of shopping uses which should be maintained in the primary and secondary areas of Stroud town centre and the primary shopping areas of the other main centres, plus the criteria to be employed when assessing the loss of Class A1 floorspace in the primary areas of Stroud as opposed to the other main centres. We consider that the general thrust and aims of these policies is robust in terms of protecting town centre health although there are opportunities to reduce the number of policies and clarify the policy of the Council:

- Not only should changes of use from A1 to other Class A uses be controlled, but also (re)development proposals.
- The approach to change of use / development in all primary frontages should be the same.
- We consider that there is an opportunity for a more streamlined approach which provides one policy for primary areas and one policy which deals with the secondary areas in Stroud and other non-primary areas in the other town centres. Both the primary and secondary area policies should adopt a criteria based approach to assessing acceptability of non-A1 uses, although the secondary policy should (as at present) adopt a more flexible approach to such uses.
- In addition to the change of use policy in district/local centres, include development proposals in these areas and also a policy which aims to protect these centres.

6.39 In addition, we consider that the policy framework in the adopted Local Plan is generally reactive in nature and there is an opportunity in the Core Strategy to offer a positive policy which emphasises the objective to maintain and develop the District's town centres as the main focal points for the location of retail, leisure, entertainment, office, arts, culture and tourism uses, including the Council's approach to actively planning for new and reinforced retail and town centre provision.

6.40 There is also a need for a refresh of Policy SH12 in light of PPS4 guidance. For example, the policy should make it clear that proposals outside of existing centres and not in accordance with the LDF will be refused permission where they have not demonstrated compliance with the requirements of the sequential approach. Proposals will also be refused where they are likely to lead to significant adverse impacts in terms of the criteria set out in EC16.1 and EC10.2 of PPS4 (including locally identified impacts) and, where no significant impacts are identified, proposals should be determined by taking account of their positive and negative impacts and any other material considerations. In all cases, impact should be assessed cumulatively, where there are recent permissions, developments under construction and completed developments. We would also recommend clarity with regards to the focus of SH12, including the removal of reference to *'developments attracting large numbers of people'* and replacement with '*main town centre uses*'.

6.41 We have also been asked to consider the need for policies in relation to managing the evening and night time economy in the District. In principle, any policies which are incorporated into the Stroud LDF should take account of and complement Stroud District Council's Statement of Licensing Policy. We consider that the following should be taken into account by Stroud District Council to enhance the evening and night time economy:

- In line with our comments made in relation to retail uses, there should be general encouragement for the location of leisure uses, including food and drink uses, within the District's town centres.
- With regards to the control of food and drink uses, the general development control policies in the Local Plan provide a good starting point and we see no reason to significantly alter this approach. However, within the assessment criteria for the primary and secondary/other town centre policy areas, it would be beneficial to include a further criterion which assesses *'whether the proposed use would give rise to noise, smell or other environmental and amenity problems'.*
- At present, when assessing the acceptability of non-A1 uses in primary shopping areas, the number and distribution of existing and committed non-A1 uses should be considered. However, where the Council wishes to promote a flexible approach to its leisure/evening economy, then this assessment criteria should be expanded to include the type of other non-A1 uses.

6.42 We have also assessed the defined town centre, primary and secondary frontage boundaries for the main town centres as set out in the adopted Local Plan. Our comments on the extent of these boundaries are as follows:

- We consider that the existing town centre boundaries in Berkeley, Cam, Dursley, Painswick, Minchinhampton and Wotton remain appropriate to the current use and function of these centres.
- Within Nailsworth, we recommend that the town centre boundary is extended to include Bridge Street, as there are a number of retail and service uses in this area. In addition, there are some commercial properties at the northern end of Bath Road (adjacent to the junction with Fountain Street) which should also be included.
- Within Stonehouse, there are a number of retail and service properties along Elms Road which contribute to the overall attractiveness of the centre which we consider should be included in the defined town centre boundary.
- Within Stroud town centre, we consider that the defined town centre boundary is a reasonable interpretation of the centre and its main functions. However, we recommend Gloucester Street is included within the secondary shopping frontages and also confirm that the Shambles area lies within the secondary shopping frontages. We have also considered whether the definition of the Merrywalks shopping centre should be secondary or primary shopping frontage. In principle, we consider that the centre should have primary retail frontage status although we are aware of the current performance of the centre and there is a need for a more flexible approach to land uses to ensure that vacancies remain (at best) at modest levels. For example, when proposals for non-Class A1 uses come forwards, we recommend that the Council use the 70% Class A1 rule and 50 metre street block definition (in the supporting text to Policy SH1 of the Local Plan) flexibly when consideration of an application against SH1's assessment criteria suggests a positive result.
- In addition, there will be a need (under PPS4 guidance) for the Stroud LDF to define Primary Shopping Areas for its main town centres. Having regard to the current structure and function of each main centre, we recommend that the Primary Shopping Area in each centre apart from Stroud should be the same as the defined town centre boundary. For Stroud, there is a need to define a PSA which covers all of the primary and secondary areas outlined in the Local Plan (plus those additional areas outlined above).

6.43 Policy EC3 of PPS4 allows local planning authorities to define any locally important impacts on centres. These impacts should be tested in cases where the requirement to provide an impact assessment is met. Such criteria would be in addition to criteria (a)-(e) of Policy EC16 and Policy EC10.2 of PPS4 and gives Stroud District Council an important opportunity to consider how the future of retailing in the District can be managed. In the context of Stroud District, potential 'locally important impacts' could include:

- Whilst accessibility is covered by EC10.2 of PPS4, shopping trips associated with Stroud's main settlements are associated with high levels of leakage to larger centres. Therefore, a locally important impact could include: the effect of the proposal on the length of shopping trips.
- The Council may also wish to reaffirm the need for impact assessments to thoroughly consider potential impacts upon not only the main town centres, but also district and local centres and rural provision.
- Finally, on the scenario where the Council could be faced with a further proposal (in addition to Hunts Grove at Hardwicke) for a large extension to the urban area of Gloucester, consideration will need to be given (potentially in conjunction with Gloucester City Council) to the 'local impacts' arising out of new defined centre in that urban extension.

6.44 Also, PPS4 allows a floorspace threshold to be set at the local level for impact assessments. Once the Stroud LDF is adopted, the minimum threshold (in PPS4) of 2,500sq m gross will be applied unless Stroud District Council set their own threshold. In the context of the scale of retail provision and the size of centres in Stroud District, the 2,500sq m threshold set by PPS4 is relatively high and we would strongly recommend that a lower threshold is set. In the context of Stroud we consider that a threshold of 1,000sq m gross is more appropriate, whilst a lower level of 500sq m gross for other settlements should be set.

6.45 Finally, where the Council wishes to allocate sites for retail and other town centre uses in the main town centres in the District (such as the ones discussed earlier in this section), these should be subject to separate conditional allocations which outline the scope of land uses, the need for a further detailed assessment of impact when detailed development proposals come forward, plus the development contribution that each site should make (e.g. contributions to improved linkages, public transport and other related issues).

7. SUMMARY AND RECOMMENDED RETAIL & TOWN CENTRE STRATEGY FOR STROUD DISTRICT

7.1 This report has been prepared by GVA Grimley Ltd in response to an instruction by Stroud District Council, dated September 2009, to prepare a Town Centres & Retailing Study for the Stroud administrative area. This study will provide essential background information to assist the Council in the production of a Local Development Framework (LDF).

7.2 The objectives of this study have been to:

- Assess current patterns of usage of the main town centres within the District, including their vitality and viability. This will take the form of a baseline survey of their current economies. The main town centres in Stroud District which are covered by this study are: Stroud, Berkeley, Cam, Dursley, Minchinhampton, Nailsworth, Painswick, Stonehouse and Wotton-under-Edge.
- Assess the need for new floorspace for retail uses taking account of quantitative and qualitative considerations, including Local Plan allocations and Regional Spatial Strategy targets for housing in the District.
- Identify deficiencies in provision and assess the capacity of existing town centres to accommodate new development, including an analysis of retail space productivity growth and the types of retail and other units required in the larger centres, especially Stroud.
- Identify locations where retail, leisure and other main town centre uses should be focused and recommend strategies for developing and strengthening them.
- Identify the roles and functions of the commercial centres, appraise the boundaries defined in the Stroud District Local Plan and, where appropriate, define primary and secondary frontages within commercial centres.
- Appraise the appropriateness, or otherwise, of Local Plan Policies in the Town Centres and Retailing chapter, and recommend changes considered necessary in order to complement the outcomes of this Study and the provisions of PPS4.
- Review all Local Plan allocations and associated policies in the town centres, highlight any sites that do not comply with the provisions of PPS4, and recommend any changes considered to be necessary.
- Identify potential new allocations in the town centres, especially under-utilised sites, within the context of guidance set out in PPS4.

- Where appropriate, recommend planning policies aimed at managing the evening and night-time economy, taking account of guidance in PPS4.
- In the case of Stroud, assess the relationship between existing out-of-centre/ out-of-town developments and the town centre, and recommend any actions considered necessary to balance: (a) the town centre's vitality and viability; and (b) the broader competitiveness of the town.

7.3 In order to achieve the study objectives, this study been informed by a number of pieces of empirical research (including household and on-street surveys), plus a detailed analysis of town centre health and current retail expenditure patterns. Arising out of these assessments, we have been able to identify the retail context in Stroud District and a set of key issues in each of the main settlements in the District. In the pages which follow, we provide a résumé of the District's key retail and town centre characteristics, which have been used to inform the retail strategy for each settlement.

7.4 Our identification of the key issues has arisen as a result of the following assessments:

- Overview of the retail hierarchy in Stroud District, focusing on a review of the vitality and viability of Stroud, Nailsworth, Dursley, Cam, Wotton, Stonehouse, Painswick, Berkeley and Minchinhampton.
- Assessment of the need for additional retail floorspace within the main settlements in the District over the period 2010-2026, focusing on an assessment of quantitative and qualitative factors for different types of retail goods. This work has drawn upon up-to-date population, per capita expenditure and shopping patterns data to provide an up-to-date assessment of the quantitative flows of expenditure to each of the main settlements.
- Following the initial quantitative assessment, we have reviewed potential shopping development opportunities in each of the main settlements. This work has examined existing allocations/opportunities identified in the adopted Local Plan, plus new potential opportunities which have been identified through the course of completing this study.

7.5 Following the assessment of town centre health, existing quantitative flows of retail expenditure, qualitative factors of need, plus potential development opportunities, we have formulated a retail strategy for the main Stroud District settlements. In order to do this, we have undertaken a broad policy options analysis, which will help the Council to develop a front-loaded LDF and will encourage a meaningful response from the local community and key stakeholders on a genuine choice of options for retail uses. The options analysis will help the Council develop its Development Plan Documents for Stroud District, plus agreeing an area-specific vision and defining key objectives. The options analysis itself has taken into account the suite of policy objectives provided at the national, strategic and local level and has assessed the potential differences between convenience and comparison shopping provision in each of the main settlements.

7.6 The outputs from the policy options analysis have informed the retail roles and strategy for each of the main centres. These roles are designed to be complementary to each other and will support the wider regeneration aims and aspirations promoted by Stroud District Council. The remainder of this section describes a series of policy approaches and initiatives which are intended to reinforce and promote the distinctive roles of the main settlements in Stroud District.

7.7 We outline below the findings of the study and its key recommendations for each of the main centres. It should be noted that the conclusions take into account the various potential residential growth scenarios for the District as outlined in the February 2010 Core Strategy Alternative Strategies document published by Stroud District Council. As a consequence, a retail strategy for some of the settlements covered by this study will be dependant on the growth that is chosen for different parts of the District. However, it should be noted that immediately prior to the finalization of this document, the new Coalition Government signalled its intention to bring forward legislation to abolish Regional Spatial Strategy documents and therefore the population growth and distribution figures in this document may need revising when further versions of the Stroud District Council Core Strategy are published.

Stroud

7.8 The town centre in Stroud has a number of assets notably its environment and the increasing popularity of the weekly farmers market. It is also the largest town centre in the District by some considerable margin and possesses the largest number of national multiple retailers. Stroud's catchment area covers the whole of the District and it assumes the role of the main comparison (non-food) goods shopping destination. However, overall, we consider that the town centre is underperforming (when considered alongside other towns in the sub-region and there are opportunities to improve its health through attracting a greater diversity of occupiers and further enhancing its evening economy.

7.9 With regard to the recommended retail strategy for Stroud, we do not consider that there is a specific and/or overriding need to identify and allocate sites for new convenience retail provision. This takes into account the different spatial options for residential development across the District in the LDF. The quality and quantity of provision across the town is considered to be good and we consider that the focus should be on maintaining and enhancing the level of provision within the town centre.

7.10 Within the comparison retail sector, there are a number of factors to take into account, including the realistic potential for the town to attract new retailers and businesses, the balance between protecting existing space and providing new space and the need for the local authority to be proactive in identifying town centre development opportunities. As a consequence of these factors, and taking into account the current performance of the town, we consider that there are three opportunity areas to expand and improve the performance of the town centre. These are: the area of land adjacent to Merrywalks; the area around the Police Station on Parliament Street; and, the Cheapside/Wallbridge area.

7.11 All of these areas have the potential to reinforce the health of the town centre, but in different ways. The Merrywalks and Police Station sites are seen as the primary candidates for expanding the retail offer in the town centre, with the Cheapside area also including retail uses but at a smaller scale and part of a wider mixed use scheme associated with the canal. Neither the Merrywalks or Police Station site is considered a straightforward development opportunity, although both need early identification in order to ensure that the LDF provides a proactive approach to planning for new retail and town centre uses and avoids piecemeal development elsewhere in the town. It is recommended that, due to the complexity of these sites, development briefs are prepared. These exercises will define the likely quantum and mix of floorspace which can be provided along with likely phasing. Given the size of Stroud, phasing of retail and town centre development sites will be important.

7.12 Overall, we recommend that Stroud should be identified as the main focus for new retail development in Stroud District within the Local Development Framework. Its is the centre which is most likely to attract new retail, service and other main town centre uses and the Council should ensure that its role and function is maintained and enhanced by identifying and supporting key development opportunities (such as the ones outlined above). This report has also made recommendations regarding the town centre designations in the existing Local Plan, including the inclusion of Gloucester Street within the secondary shopping frontages plus the definition of a primary shopping area which covers the primary and secondary shopping frontages.

Nailsworth

7.13 Nailsworth town centre is considered to be a healthy centre, with a strong focus upon convenience shopping (dominated by the Morrisons store) and a strong and well established independent retail sector. These uses influence the centre's role and function, which caters for both local shopping trips plus those from further afield. The town centre environment is considered to be attractive although there are areas where further improvements to the public realm can be made. We also recommend that the defined town centre boundary in Nailsworth is extended to include Bridge Street and some properties at the northern end of Bath Road.

7.14 Our analysis has indicated that there are qualitative and quantitative opportunities for improvements to the town centre's retail and service offer, although the different spatial development scenarios tested by our quantitative assessment has not led to substantially different future capacity levels. The focus for new provision will be on the area between Old Market and Fountain Street, where we consider there are opportunities for retail, service and other commercial uses at ground floor level (as part of a wider mixed use scheme), although redevelopment of this area should take the opportunity to provide a greater range of Class A1 retail uses. Redevelopment of this area should provide for improved linkages across the town centre and a better frontage along Old Market. In order to improve the retention of convenience shopping trips within the town, there is an opportunity to enhance the level of convenience floorspace. This is likely to be in the form of extension to existing facilities rather than a substantial new retail unit in order that the town centre retains its role as a focus for local convenience shopping trips.

Stonehouse

7.15 Stonehouse town centre is considered to be performing well as a centre which serves the day to day needs of local residents. The centre has a low vacancy rate and a high amount of service uses. Given the proximity of Stroud, the low level of comparison goods retail uses is unsurprising and the performance of the town in general is influenced by the dominance of Stroud. The evening economy has been highlighted as an area where further improvements can be made.

7.16 Our quantitative analysis has indicated that the different spatial development scenarios across the District could affect the level of capacity within the Stonehouse area. A number of the spatial scenarios place a significant amount of new residential development within the Stonehouse area which could lead to higher levels of expenditure capacity being available plus a need to resolve higher numbers of lengthy shopping trips for convenience goods. Should high levels of residential growth be confirmed for the Stonehouse area, then we would recommend that Stonehouse town centre be confirmed as the focus for new retail and town centre use provision and is likely to adopt an enhanced role in serving the retailing and other main town centre use needs. The area around the Police Station and health centre uses has been identified as a potential development site to accommodate new growth and we recommend that this area, including the need to relocate existing important land uses, is given further consideration in order to confirm availability of development plots and the phasing of development. Other options should also be pursued, including potential expansion of existing facilities such as the Co-op store on High Street.

7.17 Should lower levels of growth be allocated to the Stonehouse area, then we consider that there is less of a pressing need to identify further development sites and the focus will be on maintaining and enhancing existing provision, although this should not restrain any market demand to make smaller scale improvements in the retail offer of the centre.

Cam & Dursley

7.18 The retail strategy in the adopted Local Plan to provide new retail facilities in Dursley has now been realised following the construction of the Sainsbury's foodstore on Castle Street. This store will make a significant qualitative improvement to the retail offer in Dursley and should attract more people to the town centre and lead to spin-off benefits for the remainder of the centre. In recent years, the health of Dursley town centre has suffered and there have been increasing vacancy rates with a corresponding decrease in the number of comparison retail and service uses.

7.19 As a consequence of the introduction of the Sainsbury's store, short to medium term quantitative and qualitative needs in Cam and Dursley's convenience provision will be met, with a better balance of provision in the two towns. The need for additional convenience floorspace provision in the Cam and Dursley area will be influenced by the level of new residential development. Only higher levels of residential growth are likely to warrant the provision of additional floorspace and this is likely to be phased towards the end of the plan period.

7.20 In relation to other parts of Dursley town centre and Cam district centre, we consider that the Council should adopt a monitoring role to assess the impact of the new Sainsbury's store on the performance of the town centres and Dursley's future role and function across this part of Stroud District. We do not consider that there is sufficient justification for planning in the short term for new comparison goods floorspace in Dursley, given the performance of existing stores and the lack of readily available sites.

7.21 Cam performs the role of a District Centre in the retail hierarchy and is dominated by a Tesco foodstore. The Council should consider enhancing the role and function of the defined district centre, particularly where a significant part of the growth in Cam/Dursley is directed towards Cam. The district centre will be the focus for the day-to-day shopping and service needs of the local population and land should be identified by the LDF to enable the centre to grow in the future and provide an expanded range of facilities without detracting from the role of Dursley as the main town centre serving the wider area.

Wotton-under-Edge

7.22 In financial terms, existing retail floorspace within Wotton is considered to perform well and, whilst there has been a small increase in the number of vacancies over the last couple of years, we consider that there are opportunities for expanded provision. However, given the role and natural catchment area of Wotton, the opportunities for expanding provision will be modest. This is reinforced by the constrained built environment within the centre. The greatest focus appears to be on the convenience retail sector, where existing stores are assessed to be trading at reasonably high levels. In order to improve and expand provision, two development sites (Old Town and between Haw Street and Market Street) have been identified, although we consider that the opportunity to expand existing units should also be explored.

7.23 Both the Old Town and Haw Street/Market Street sites lie in relatively close proximity to the core town centre area, however both suffer from poor accessibility which could affect their ability to integrate with the existing town centre. In addition, both sites, particularly the Old Town site, are relatively large and large scale retail provision in these locations has the potential to have a significant effect upon the performance of the town centre. We have some reservations over the provision of large amounts of convenience floorspace in these locations and the potential to be out of scale with the role and function of the town and the impact upon the trade/turnover of existing stores. There is clear potential to improve the convenience retail offer in Wotton although we consider that expansion of existing facilities is the better solution, which enables improvements to be made within the heart of the existing retail area. Given the structure of the built environment, expansion will not be a straightforward solution, although we consider this should be pursued in the first instance.

Other Centres in the District

7.24 The other three centres covered by this study (Painswick, Minchinhampton and Berkeley) are much smaller scale than the five main centres and serve a localised catchment area for the day-to-day shopping and service needs of the local population. Some uses within these centres also cater for a niche shopping and service role for the local population and visitors to the District, which is an important contributor of their ongoing health. We have not identified a need to make allocations for additional retail provision within these centres, as the emphasis will be on the need to maintain and enhance their health through policies which protect existing businesses from adverse impacts and allow for reasonable flexibility for the use of existing premises.

7.25 Apart from the existing settlements in Stroud District, two urban extensions to Gloucester within the Stroud District administrative area are promoted through the draft RSS. One of these urban extensions, Hunts Grove, has already achieved planning permission and includes a modest amount of retail and service floorspace (circa 2,000sq m). The other urban extension, if confirmed by the RSS, will provide a significant level of residential development (1,500 units) and we recommend that consideration will need to be given to the scope and extent of new retail and service provision within this area. Within this report we have outlined some of the factors which should be considered when deciding how to plan for new provision, including walking, driving and public transport accessibility indicators.

Review of Retail Policy Framework in Stroud District

7.26 In light of the recent publication of PPS4, this study has also revisited retail and town centre policies in the adopted Local Plan and provided recommendations on potential revisions in order to ensure that they are up-to-date and relevant to national policy guidance. The following recommendations have been made:

- Provide a more streamlined policy approach to assessing proposals in primary and secondary shopping frontage areas, including the need for this aspect of policy to deal with changes of use and redevelopment proposals.
- Provide a positive and overarching policy approach to maintaining and enhancing the District's town centres as the main focal point for retail, leisure, entertainment, office, arts, culture and tourism uses.
- Revise Policy SH12 of the Local Plan which deals with proposals for main town centre uses on sites outside of town centres, to ensure that such proposals are determined in line with PPS4 advice.
- In line with PPS4 advice, introduce new 'locally important impacts' relating to the impact of proposals on: the length of shopping trips; the health of district and local centres plus rural provision; and, the impact of new provision arising out of the planned urban extensions to Gloucester.
- In line with PPS4 advice, we have also recommended a floorspace threshold for the submission of impact assessments to accompany applications for main town centre uses: 1,000sq m in Stroud and 500sq m in other parts of the District.
- Finally, we have also provided recommendations for promoting and managing the evening and night time economy in the District. We have suggested that:

1. in line with comments in relation to retail uses, there should be general encouragement for the location of leisure uses, including food and drink uses, within the District's town centres
2. we support the approach to controlling food and drink uses in the existing Local Plan, although have suggested an additional assessment criterion which considers the noise, smell and other environmental and amenity issues
3. when considering the acceptability of non-Class A1 uses in primary shopping frontage areas, the number and distribution of existing and committed non-A1 uses should be considered.

A:

Study Area Plan

B:

Household Survey Results

C:

On-Street Survey Results

D:
Population Growth Options For Stroud District

E:

Scenario A1 Quantitative Assessment

F:

Scenario A2 Quantitative Assessment

G:

Scenario B1 Quantitative Assessment

H:
Scenario B2 Quantitative Assessment

I:

Scenario B3 Quantitative Assessment

J:

Scenario C Quantitative Assessment

K:

Scenario D Quantitative Assessment

L:
Scenario E1 Quantitative Assessment

M:

Scenario E2 Quantitative Assessment

N:

Scenario E3 Quantitative Assessment

O:

Note of Painswick Meeting

P:

Note of Minchinhampton Meeting

Q:

Note of Stroud Meeting

R:

Note of Cam/Dursley Meeting

S:

Note of Wotton-Under-Edge Meeting

T:

Note of Nailsworth Meeting

U:

Note of Stonehouse Meeting

V:

Retailer Requirements for Stroud

W:

Pedestrian Flow Count Data