APPENDIX A

FUTURE OF TOWN CENTRES

STROUD, NAILSWORTH, STONEHOUSE, DURSLEY, WOTTON-UNDER-EDGE

August 2017

Contents

Introduction

This study aims to consider what the major Town Centres within Stroud District Council (SDC) area will look like in 2031 and how they may function. The study further considers what policy levers are at the disposal of SDC to modify negative effects or boost positive effects of change and how effective they are likely to be.
In seeking to achieve this objective the study is divided into the following sections. The first section will consider the national context: whilst the major towns in the District are imbued with an individual character and are likely to require consideration of individual policy responses to the challenges of the future they will all come under the influence of the national context in which they operate.

The second section of the study will consider critically the existing policy context and the existing evidence base.

The third section of the study will examine the existing character and health of each of the Town Centres. The Town Centres chosen for the study accord with the top two levels of Town Centres as set out in Policy CP12 of the adopted Stroud District Local Plan (November 2015) namely the Principal Town Centre and Other Town Centres.
The fourth section will report on the presentation of the findings of the first four sections of the study to stakeholders in each of the Towns. The section will include the stakeholders' suggestions for potential policy changes to respond to the likely evolution of the Towns.

The final section of the study will consider the Strengths, Weaknesses, Opportunities and Threats (SWOT) to each Town. This section will also consider, drawing on the stakeholder engagement, the potential policy responses by Stroud District Council and other actors to the circumstances found within each Town Centre and their likely efficacy.

1 The National Context

1.1 The retail and service sectors of town centres have undergone and are still undergoing considerable change which will affect the functioning of town centres during the study period. The previous paradigm was that with increasing wealth, population and leisure time coupled with increasing personal mobility that there was a need for a continual expansion of retail and service floor-space, with planning policy seeking to direct that growth to suitable locations, either in town, edge of town or out of centre. That paradigm is now very questionable. Unfortunately, whilst there are strong clues as to the replacement paradigm it has not yet fully emerged to unequivocally guide policy responses. The study will, in the remainder of this section, consider the detail of these new trends and their effect.

E-Retailing

1.2 The archetypical ‘High Street’ in the last Century up to the 1980s comprised a butcher, greengrocer, baker and grocer with ancillary service uses. It was the only place for food, clothes and homewares, banking and other services. The rise of out of town supermarkets and retail parks in the 1980s marked the commencement of the decline of traditional ‘High Streets’ and resulted in various pieces of Government guidance/policy protecting town centres. A report by David Milt, Head of Consumer Research at Parcelhero, entitled ‘2030: The Death of the High Street’ notes that in 1950 there were 600,000 shops in the UK; in 2012 there were 290,000. The onset of e-retailing in all its forms - click and collect, home deliveries, online shopping - has provided a further challenge.

1.3 The UK has one of the most developed online markets in the world, but physical stores are still very much at the heart of shopping, nevertheless[1] the channels for retailing are becoming increasingly intertwined. In particular this is best demonstrated by the fact that ‘click and collect’ spend at constant prices was forecast to grow substantially between 2015 to 2016 from some £8bn to £11bn. There is evidence of consumers viewing comparison products in store but ordering online, potentially at a lesser cost. The decimation of physical booksellers on the High Street can chiefly be laid at the door of Amazon, whose growth into other goods categories including the purchase of a small supermarket group with stores in the UK, also provides a significant threat in the future.

1.4 Physical stores will remain at the heart of shopping but with the growth of various channels the level of overall spend will increase but will not necessarily lead to an immediate demand for new floorspace. The outlook for new retail/service floorspace is far from clear, Experian consider that non store retailing spending will continue to grow rapidly in real terms from 2015 to 2035, outpacing traditional forms of spending, to account for some 20% of sales by the mid 2030s[2].

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1 Verdict/True value of Stores July 2016.

2 Experian Retail Planner Briefing Note 13 Oct 2015.

1.5 It is expected that the demand for new convenience goods floorspace up to 2031 will be very modest mirroring the expected growth in overall convenience expenditure. For comparison goods the redevelopment of older more inefficient space, potentially redundant service sector space such as banks, is likely to result in some demand but less than would have been forecast without the existence and growth of multichannel retailing.

'Cafe Culture'

1.6 The growth of 'cafe culture' has been the saving of many high streets. Neil Wrigley, Professor of Human Geography at the University of Southampton, quoted in the Financial Times notes:[3]
'The UK's town centres and high streets have been progressively shifting their orientation from retail to services and leisure uses for at least two decades in line with changing consumer culture, lifestyle and demographics'.

1.7 In his research on 1,100 high streets he found the number of cafes, restaurants, hairdressers and opticians increased by 24% between 2000 and 2006, whilst apparel stores fell by 4%. This trend persists with research by The Local Data Company finding that health and beauty services were among the fastest growing businesses by floorspace in 2015.

1.8 The growth of cafe premises and their popularity is evidenced by the emergence of nationwide chains such as Starbucks, and Costa, though consumers prefer independent operators.[4]

1.9 The growth of cafe culture is reinforced by the trend of increased 'eating out', particularly evident amongst those of below pensioner age.[5] A trend that will be likely to be enhanced as those in younger age cohorts move through having been socialised into increased demand for 'eating out'.

1.10 The specific evidential reasons for the growth in expenditure in cafes/ restaurants are difficult to find but in the case of cafes the free on site Wi-Fi, the improvements to the range of products on offer and the changes over the last decade to working practices may account for some demand as there is an increasing blurring of work and leisure time.

1.11 Restaurant expenditure growth may be accounted for by factors such as increased interest in the culinary arts, not least stoked by the plethora of 'cooking shows' on television and foreign travel, engendering in the population desire for new culinary experiences. The latter trend has also helped the continued existence of specialist convenience retailers supplying artisan and niche products.

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3 FT 14/6/16 .
4 Cafe culture show data May 2016.
5 NEMS market research March 2016.

1.12 A further factor may be the growth in interest of certain sections of the population in the provenance of food, its sustainability credentials and also the trend towards healthy eating.

1.13 The result of a diversified town centre which has an active 'cafe culture' is increased dwell time of town centre users and increased footfall and night time usage.

The 'Service' Sector

1.14 The typical High Street up until the millennium was the spatially preferred location of such service type uses as banks, building societies, recruitment agencies, estate agents, turf accountants and post offices. This is no longer a given.

1.15 Turning first to banks, the onset of personal electronic banking, including seeking loans, together with personal electronic transfer of funds has made the use of cash and cheques decline. The introduction of debit and credit cards with contactless technology has further reduced the need for citizens to carry cash. The provision of online banking and the ubiquity of ATMs have reduced the physical need for banks to retain premises on Britain's high streets. A financial website 'This is Money' reported in May 2016 that: "Britain's biggest banks have shut three branches every two days in the past year"
"Campaigners argue suburbs; market towns...tend to suffer most".

1.16 A leading article in the Sunday Times Business section of 4th December 2016 noted that five years ago the largest five banking groups had some 7821 branches, in December 2015 some 6740 and a year later in December 2016 some 6,225.

1.17 Building societies are also coming under the same pressures of the electronic age as banks with the continued growth of online banking. It can plausibly be argued that the principle customers for physical branches of both banks and building societies are the same groups and now comprise those within the population who were socialised before the widespread use and expertise in electronic communication. This group are by definition destined to decline with time, there is therefore scant expectation that the demand for physical financial premises will grow; rather it is to be expected that the current trend of decline will continue.

1.18 Service uses such as recruitment agencies and estate agents are also being affected by the 'electronic revolution'. Websites such as Purple Bricks and Right Move are run from offices with no physical presence on the High Street. It is also foreseeable that in the future estate agents will no longer need, nor wish to pay for, premises on the high street. The vast majority of their business can be undertaken electronically, with staff based either at home or in offices, a cheaper option than being in a retail premise on the High Street. Similarly it is to be expected that recruitment agencies will fall under the same pressures with much of their business being able to be undertaken electronically coupled with off the High Street offices. Travel agents are already a much rarer use on the High Street than prior to the emergence of ‘holiday’ web sites and internet sites such as Expedia and Trivago.

1.19 Even the presence of turf accountants on the ‘high street’ are under threat. The rapid growth of online betting from electronic devices provides customers easy access to gambling. The continued existence of physical betting shops may be a function of the cash pay out slot machines which are licensed within those premises. With online gambling growing it is possible that cash slot machines may not be sufficiently popular, nor supported by government, to ensure the continued presence of betting shops on the High Street. A recent biannual study (May 2017) by the Gambling Commission shows a gradual reduction in premises. In addition there is a recent enhanced pressure from social campaigners to end the licensing of those machines. The result would be further pressure on betting shop companies to reduce their presence on the High Street as the gambling machines provide the overwhelming bulk of profit in many premises. It is noteworthy that the sector as a whole has undergone considerable consolidation such that independent operators are a rarity. Decisions on individual sites are made at a corporate level based on profit and dependant on the licensing regime.

1.20 Even quasi-public bodies have not been immune from changing consumer habits and technology. Over the past 30 years the number of post offices in the UK has almost halved from some 22,000 branches in the early 1980s, although with Government intervention the numbers have remained stable over recent years at a branch network of some 11,500 branches. The Government’s paper ‘2010 to 2015 Government Policy: Postal Service Reform’ notes that “ the Government’s strategic policy for the future of the Post Office network sees a network with a minimum of 11,500 post office branches being maintained with the company becoming more sustainable and viable’. However this level of coverage is somewhat of an aspiration and the impact of electronic technology and the need to run a commercial operation may place pressure on this aspiration. It is also noteworthy that uses such as ‘job centres’ on high streets have also declined, not least because of seeking cost reductions.

Trends in Leisure

1.21 Research completed by the Economic and Social Research Council assessing the diversity of uses within 1,100 centres and high streets during 2000 to 2006 (the years preceding the recession) provides a clear indication that during this time, when the economy was strong the leisure service industry was thriving. They found that Leisure spend is often considered a discretionary activity, and as such, consumer spending on leisure is greatly influenced by the economic climate and in particular average levels of disposable incomes. However, when assessing the average spend of UK households on leisure activities it becomes clear that even in light of an economic downturn consumers in the UK have shown a growing desire to engage in leisure activities.

Figure 1 | ONS Weekly Household Spending Data on Leisure Items

Leisure Item / Activity	2006	2011	2014
Sports admissions, subscriptions, leisure class fees and equipment hire	£5.80	£6.70	£6.90
Cinema, theatre and museums etc.	£2.00	£2.40	£2.80
Admissions to clubs, dances, discos, bingo	£0.60	£0.60	£0.50
Gambling payments	£3.60	£2.70	£2.90
Restaurants and café meals	£12.80	£14.70	£16.60
Take away meals/food and other snack food	£8.10	£8.40	£8.80
Total	**£32.90**	**£35.50**	**£38.50**

Source: *'Family Spending, 2015 Edition', ONS, released on 8 December 2015*
'Family Spending, 2012 Edition', ONS, released on 4 December 2012
'Family Spending, 2006 Edition', ONS, released on 28 January 2008

Figure 1 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and after the recession (2014). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.

The most recent ONS data (for the 2014 year) identified that an average household would spend £38.50 on leisure activities, including £6.90 on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.80 on going to 'cinemas, theatres and museums'[6]. This is out of a total of £531.30 spent on average per week by UK households. It is interesting to assess the data on average household spending from the ONS for the years both preceding (2006) and during the recession (2011). The ONS average household spending figures for 2011 identify that out of the average weekly spend of £483.60, households spent – £6.70 on 'sports admissions, subscriptions, leisure class fees and equipment hire', £2.40 on going to 'cinemas, theatres and museums'. What is more, ONS data from 2006 confirms that on average households spent £455.90 per week, and of that £5.80 was spent on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.00 on the 'cinema, theatre and museums' etc. The

[6] 'Consumers spending more on cars and leisure, says ONS', Brian Milligan, BBC Business News Online, 8 December 2015

significant increases in spending from 2006 to 2014 illustrate the popularity of spending on leisure activities. Leisure service units within UK town centres increased by 23% between 2000 and 2006[7].

1.22 As evident when assessing consumer spending figures (recorded by the ONS) as at 2014 the leisure industry had strengthened since previous years (2006). Mintel calculated that this industry was estimated as worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth[8]"

1.23 However the opportunities to introduce such attractions as cinemas, gyms and restaurants only exists where there is a shortage. For the towns studied, and in particular Stroud, there is already a cinema, and a relatively newly opened gym. In Dursley it is understood that the newly enhanced leisure centre 'The Pulse' has attracted a considerable clientele.

Summary

1.24 In a 2014 study undertaken by the University of Southampton entitled 'High Street Performance and Evolution' the authors (Professor Neil Wrigley and Dr Dionysia Lambriri) found that the speeding up of the trends that have been identified above was a function of the recession in the UK economy from 2007 to 2011, but warn that high streets will not revert to the pre-existing paradigm. The authors consider that at the heart of the evolution the High Street will continue the long term structural shift away from retail provision to non-electronic personal services.

1.25 The direction of travel on e-retailing in all its forms is mixed; in some retail categories the adoption of multichannel retailing may strengthen physical stores, i.e. click and collect. Other forms of e-retailing including those applicable to service uses, such as banking are and will continue to lead to a diminution of demand and overall reduction of physical floorspace.

1.26 There is a positive story to tell with the rise in local convenience stores and food outlets, giving evidence to the trend outlined above of a newly emerging food and cafe culture.

1.27 Research by PWC in the first half of 2016 reported in October 2016 noted: 'Comparison goods retailers are under the most pressure across Great Britain with fashion stores and men's and women's clothes shops all in the six hardest hit sectors'

1.28 Matthew Hopkinson, Director of The Local Data Company stated:
'The retreat of multiples from town centres continues, reflecting the wider changes happening in retail driven by the retrenchment of comparison

7 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015
8 'Leisure Review', Mintel, October 2015

goods retainers, especially in clothing and footwear....the spaces left by the traditional occupants of our High Streets are being increasingly filled by health card operators, food and beverage operators and the ongoing rise of the discounters'.

1.29 It would be tempting to conclude that a new paradigm has emerged to guide policy formulation and action, but this would be misleading. Some trends may be less long term than current consumer fashion, such as the emergence of the 'pound shops'. A flight by consumers to a quality shopping experience with increased economic prosperity, could spell the end of this category's expansion.

1.30 However the reduction in demand for floorspace for financial services is not likely to be reversed and will be likely to continue. The demand for convenience floorspace is also not likely to grow to any large extent. In particular, the growth in convenience goods expenditure is very low and the market is being affected by home delivery, click and collect and competition from 'deep discounters', such that more established fascias may be forced in some locations to reduce floorspace or even depart the market as Morrison's 'C Stores' have done. The increase in major fascia small convenience stores has been made at the expense of the traditional corner shop[9]

1.31 The reduction in apparel and shoe sales floorspace, not linked to multi channel retailing is also, with the affects of electronic shopping, likely to continue. However the rise in demand for personal services, leisure and cafe culture floorspace is likely to continue.

1.32 High Streets will continue to be the focus of retail and community leisure activity, however, the challenges they face are potentially more challenging than they have faced since the commencement of the 20th Century. The ongoing pattern of change suggests that larger centres, which have a greater representation of national retailers, are likely to be well placed to weather the changes.

1.33 For smaller centres Town Centre strategies which support the continued evolution of the High Street are considered even more vital. This may involve less prescriptive policies towards centres reflecting rather than opposing some of the trends outlined above. Policies which support the emergence of better quality rather than a larger retail centre, maximising the benefits of the tourist trade and proscribing value to a retail unit in use, even for uses such as hot food takeaway in circumstances where they are already prevalent, is preferable to having a long term vacancy on the High Street.

1.34 It will be important that town centres are well positioned to be able to adapt to on-going changes in the retail and leisure sector.

9 Sunday Times 30/10/16

2 Policy Context and Evidence Base

Policy Context – the History

2.1 The challenges of the 1980s with the rise in out-of-town shopping comprising large food stores and retail parks produced a reaction from policy makers. Planning circulars and planning policy guidance were produced from the 1970s onwards where successive governments sought to modify negative effect on Town Centres.

2.2 An article in The Planner (August 2016) reporting on a National Retail Planning Forum seminar 'The Changing Face of Retailing', noted that the planning system is too inflexible and too slow to respond to changes in retail with the result that many UK High Streets face an uncertain future.

2.3 Cliff Guy, in a book entitled 'Planning for Retail Development' published in 2007, identifies four distinct phases of policy reaction to the emergence of threats to the established dominance of the High Street.

- 1960s/1970s- early days of retail regulation with initial resistance to new retail forms.
- 1980s – a loosening up of regulation to a more market led approach allowing an expansion of new retail forms, mirroring the prevailing general political climate of the 'Thatcher era'
- Late 1980s – the gradual tightening up of policy as effects on Town Centres become perceived by the public and policy makers.
- 2000s - the continuation of Town Centres first policy which has redirected off-centre developments and focused attention back into Town Centres.

2.4 As can be noted by this very summarised policy chronology, policy has tended to switch emphasis between restriction on new forms of retail development, to limited encouragement of such development as the realisation of its positive economic effects are recognised and then returning to greater restriction as pressure groups, public sentiment and nostalgia takes hold. The policy reaction to the 'out of town revolution' was not one of a consistent evolution of policy but rather a reaction to economic circumstances pertaining at the time and political and social pressure. The chronology of policy change justifies the judgement set out above that the planning system is good at responding too late and not necessarily appropriately after events occur. It is generally a function of planning policy that it is very firmly based on compelling evidence, however, real world chronology often requires more immediate policy re-consideration but this tends to lag behind the real time events.

Current Policy

2.5 With the new decade of the 2010s Government sought to promote a more pro development approach to assist the economy out of recession and to simplify and reduce the quantity of planning guidance. The result was the publication of the National Planning Policy Framework (NPPF) in March 2012, a much vaunted reduction of some 1,500 pages of advice to 49, though the NPPF was backed up by guidance available only electronically which is much lengthier. The NPPF document is currently under review.

2.6 Section 2 of the NPPF focuses on 'Ensuring the Vitality of Town Centres', with the advice that policies in Development Plans produced by local authorities should be positive, promote competitive town centre environments and set out proposals for the management and growth of centres over the plan period. The NPPF recognises the social importance of Town Centres requires definition of primary and secondary shopping frontages and recognises the role of street markets. The document also encourages planning authorities to produce policies which meet the needs of all Town Centre uses, including leisure, commercial, office, tourism, cultural, community and residential uses.

2.7 The NPPF marks a continuation of the immediately preceding advice of the sequential approach for main Town Centre uses, a Town Centre first approach. Retail, leisure and office proposals outside the Town Centre above a national size threshold require to be justified by an impact analysis on existing, committed and planned public and private investment in town centres.

2.8 It is noteworthy that the NPPF in the section that first deals with town centres (2.3) encourages the growth of centres. This encouragement of Town Centre growth in an electronic age of retailing and certainly the commencement of a new retail paradigm may be an example of previous attempts by policy to regulate by fighting yesterday's battles. John Reynolds of the Oxford Institute of Retail Management and Said Business School said at the 2016 National Retail Planning Forum that under pressure from internet shopping:

> 'spatial aspects of retail were changing rapidly' requiring 'a more creative, flexible and permissive planning system' 'The planning system is very good at saying no; it's much less good at facilitating flexibility and growth'.[10]

2.9 The Stroud District Local Plan was adopted as part of the Development Plan on 19th November 2015 and the policies in the Plan are a major determinant of development management decisions. Planning law requires that applications for planning permission must be determined in accordance with the Development Plan unless material considerations indicate otherwise.

2.10 Material considerations can include inter alia emerging Neighbourhood Development Plans (NDP), the NPPF, and National Planning Practice guidance.

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10 The Planner, August 2016

2.11 The adopted Local Plan policy dealing with retail and Town Centres is Core Policy CP12. The policy sets out a retail hierarchy with Stroud being the sole Principal Town centre and Dursley, Stonehouse, Nailsworth and Wotton –under –Edge being designated ‘Other Town Centres’. Primary and secondary shopping frontages are defined on the proposals maps in the plan.

2.12 The stated purpose of the core policy is to seek to protect and bolster the role that the District’s Town Centres play in providing jobs and contributing to the local economy. The hierarchy was informed by district wide retail studies undertaken in 2010 and updated in 2013. These studies have been further updated as part of this report and the results will be set out in the next section.

2.13 The policy seeks to maintain the role of the identified centres to ensure they provide a range of facilities and services; retail proposals outside the centres are required to justify their use by submission of retail impact statements for proposals over 1000sq m for Stroud and for the remaining centres studied 500sq m (Policy EI9 refers).

2.14 The Local Plan seeks to encourage all Town Centre appropriate uses to locate in the centres such as leisure, entertainment, cultural, tourist entertainment and mixed uses.

Evidence Base

2.15 As part of the evidence base for the Stroud District Local Plan 2015 an update to the 2010 Retail Study was produced by GVA dated July 2013. The study found that there was no real change in floorspace requirements between the 2010 study and the 2013 update. However, this conclusion was reached on the basis of the forecast special levels of trading at that time (mail order and e-retail). However, as discussed in section 1 of this report those assumptions have not been amended to account for the increased growth of e- retail.

2.16 The study recommended changes to secondary frontages in Stroud, and definition of a primary shopping area and Town Centre boundary changes to Stonehouse and Nailsworth. This recommendation is reflected in the adopted Local Plan.

2.17 The amount of vacant floorspace within the towns studied was not taken into account as a potential reservoir of available space. Since 2013 the likely demand for retail capacity in the towns being studied will have and continues to be affected by new retail commitments outside the District’s boundaries. For example, John Lewis will be opening in Cheltenham and there is also a further 100,000 sq ft site potentially available in the town. The expansion of the sub-regional shopping centre at Cribbs Causeway, now a called-in planning application by the Secretary of State, and the expansion of the retail offer at Gloucester Docks to include a Next Home and fashion stores will all have an effect.

2.18 The policies of the adopted Local Plan are bolstered by the emergence of Neighbourhood Development Plans (NDP), whose policies, when the plans have undergone a referendum, have the same force as policies of the adopted Local Plan.

2.19 Of the centres the subject of this study, Stroud has a 'made' Town Centre NDP, whilst Stonehouse and Dursley have draft plans and Wotton-under-Edge has recently published a community plan update.

2.20 The Stroud NDP sets out a vision for the centre to build upon policy and to form a base for the promotional statements seeking to deliver that vision up to 2035.

2.21 The vision for the town is that it should be "a welcoming, healthy, thriving place.... attractive and (making) the most of its heritage and its diverse cultural character; it should be accessible to all and have a vibrant feel; and it should be an economically, socially and environmentally sustainable place which reflects its bohemian and green personality".

2.22 The NDP in summary contains policy which seeks to encourage new business and residential floorspace to locate in the centre, particularly on upper floors and also seeks to encourage the retention of retail frontages within the primary shopping area. The NDP also identifies sites capable of redevelopment and enhancement. Within the promotional statements the NDP seeks to influence matters beyond the remit of the Town Council, such as car parking provision, town centre promotion and pedestrian priority.

2.23 The NDP at Appendix Three, within a SWOT analysis, notes the threat of falling market share by reason of the growth of other centres and the growth of e-retailing. The SWOT analysis in the NDP reproduced at Appendix 1 of this report demonstrates the concerns and potential of the current situation, but the potential remedies are perhaps curtailed by the document being a spatial plan with only spatial policies being promulgated.

2.24 The Stonehouse NDP is at an advanced stage currently being considered through an examination to be followed by a referendum and, subject to approva,l being made by SDC and acquiring the status of a constituent part of the Development Plan.

2.25 The draft NDP encourages retail and service premises within the defined primary retail frontage and notes that the town has a 'vibrant high street with high occupancy rates' but also acknowledges the competition threat from 'online retail offers'.

2.26 A Pre-Submission draft version of the Dursley NDP was published in November 2015. A major cornerstone of the draft document is the 'vision for Dursley' which looks ahead twenty years. The vision is that the town will serve 'as the prime market town serving the South of Stroud District'. The Plan seeks to retain Town Centre retail and support local tourism. The Plan notes that whilst since 2007 when an Urban Design framework identified specific action, some of which has occurred, such as the new Sainsbury's store, there remains a continued aspiration to improve public realm as opportunities arise. The Plan envisions non-spatial opportunities to support the Town Centre including setting up a retailers' association and, in conjunction with SDC, to set up a Business Improvement District to raise funds to improve retailing in the Town. Whilst the mechanism for this initiative is clear there are no specific projects envisaged apart from an unspecified marketing campaign and events. The Plan promotes improvements to long and short stay car parking in the Town Centre, though the Plan recognises that this Policy requires action by other bodies.

2.27 The Wotton-under-Edge Community Plan was first published in 2005 and has been reviewed in 2016. The plan is not a document produced under the auspices of national planning legislation but it nevertheless is a relevant source for this present study.

2.28 The Plan notes that the world in 2005 looked very different to current circumstances having weathered a global financial crash and with the effects of Brexit still to emerge. The Plan notes that the High Street businesses have been diminished with the closing of banks and the onset of online shopping and home deliveries and finally the increasing attraction of other centres within the greater Bristol conurbation.

2.29 The Plan notes the strengths of the town, including the Town Regeneration Partnership and the high quality historic centre, but notes the persistent perceived parking problems in the centre. The Plan within its priorities identifies the need for a diverse selection of shops and a reduction in number of vacant premises and within an Appendix to the Plan sets out suggested action to achieve this aim. Those actions together with other potential initiatives will be further discussed later in this study.

3 Existing Character And Health Of The Town Centres

3.1 The third section of this report focuses on the retail health of the Town Centres that are being studied utilising time series data to identify apparent trends since 2005. Whilst they should be treated with caution the overall balance of the various categories of retail is compared to the United Kingdom percentages. In addition the commentary on each Town will also comprise more subjective analysis drawn from surveying the individual centres.

Stroud

3.2 The time series survey data of Stroud Town Centre and the other studied centres from 2005 to 2016 are set out in Appendix 2. That data utilises the areas as defined as the town centre at the time of the particular surveys and therefore strict comparison is not entirely accurate as the area has expanded, nevertheless, the figures demonstrate that the percentage of convenience outlets (4%) is far below the national average (13%). In fact, the surveyed figures highlight a trend that that has occurred over time, with a significant fall in convenience food retail stores now being reduced to a single supermarket (Iceland), a baker and two small shop units. The town now has no butcher or dedicated greengrocer. However the town has a notable and well attended farmers market on Saturdays.

3.3 The overall level of vacancies is commensurate with the national percentage. The percentage of comparison units in the town is above the national average, though the number of national retailers or even regional retailers is small; the most notable being Argos, New Look, WHSmith, Halfords, Boots and Wilkinson.

3.4 The Town has greatly benefited by being the home, in various buildings, of an expanding and dynamic employer, Ecotricity, whose employees, circa 700, are a major component in supporting the Town Centre.

3.5 The Town is markedly different from the other towns studied, mirroring its position in the retail hierarchy in the Local Plan. The number of retail premises present is nearly three times larger than the next biggest town (Nailsworth). The Town acts as the 'capital' of the District, demonstrated by its position in the Retail Rankings 2014 (a UK wide ranking of Town Centres produced by Mintel) at number 503, compared to Nailsworth (1895) and Dursley (2146). Stroud is described in those rankings as a 'Major District' centre, with Nailsworth and Dursley both described as Local Centres. The remaining two towns, Wotton-under-Edge and Stonehouse, are not present in the rankings.

3.6 Appendix 3 comprises three tables derived from a current study by the Council's retail consultants focused on Stroud which consider the likely demand for comparison floorspace in Stroud up to 2031, including existing commitments, but with a reduced market share reflecting increased competition from other centres which have planned or implemented investment such as Cribbs Causeway, Gloucester and Cheltenham. The results show that the level of comparison floorspace capacity is likely to reduce considerably, with only the final period, 2026 to 2031, having some potential growth. However, capacity analysis for such a distant period as 2026 to 2031 must be treated with considerable caution, as such variables as e-retailing's growth trajectory or even the emergence of new forms of retailing and national trends are difficult to quantify with any accuracy for such a distant period. In addition, whilst it is possible to project the floorspace requirements to 2035, the end date for the ongoing review of the adopted local plan, the difficulties of producing long term predictions as set out above leads to any data produced from 2031 to 2035 being subject to very great uncertainty. It is a more productive exercise to review the likely need for floorspace in the early 2020s for later periods, when data will be more reliable.

3.7 It is likely that with the merger of Argos and Sainsbury's the existing Argos premises in Stroud will at some stage be replaced by a 'click and collect' facility within the existing out of centre Sainsbury's store. National retailers such as Wilkinson (Wilko), New Look and Halfords may also refine their business model as a reaction to national trends and choose at the end of lease periods to withdraw from lower order centres such as Stroud. Wilkinsons have recently announced nationwide redundancies and WHSmith business model robustness has been questioned by some retail specialists such as David Milt in his report '2030; The Death of the High Street' referred to in Section Two of this study. In a recent study produced for Sheffield City Council and Rotherham MBC by GVA the authors note that 'it will be the smaller town centres that will lose out'. It is also noteworthy that the Town's main anchor retail development, Merrywalks, is currently for sale and the future for this site is far from clear.

3.8 As discussed in Section Two of this report, the threats of e-retailing and consumption of services electronically, such as banking, recruitment, house buying, gambling and travel all present a meaningful threat to Stroud and the demand and need for physical presence on the High Street premises.

3.9 Nevertheless, a more positive future view of convenience retailing in particular, is not unreasonable given the paucity of convenience outlets in Stroud and the food culture evidenced by the popularity of the Farmers Market and reinforced by national trends (as discussed in Section Two). However, whilst an identified gap in the market is evident, the fulfilment of it will depend upon local initiatives. The likely emergence on out of town sites of discount convenience retailers may restrict this opportunity somewhat.

3.10 A project entitled the Digital High Street Pilot, incorporating the #WDYT ('What Do You Think') campaign, sponsored by the Dept. of Communities and Local Government and Gfirst, the Local Enterprise Partnership, has recently reported. The aim of the project, focussed on Stroud as well as neighbouring Gloucestershire towns of Gloucester and Cheltenham, was to increase the use by retailers of social media to advertise their activities and retail offer and the results demonstrate that the town has moved from 270th in the UK Digital Influence Index in 2016 to 106th presently. Whilst the project provided no data on increased revenue for retailers within the town it has resulted in an increased awareness and use of social media within the town by retailers.

3.11 In summary, the existing Town Centre of Stroud is facing a future where there is likely to be a marked contraction of comparison floorspace, a reduction in the number of service units across several categories in reaction to national e-retailing trends and as a consequence freeing up of more retail space. These trends will be accompanied by an increase in vacancy rates. There are some opportunities to reduce this level of unused space by capitalising on the evident popularity of the market and current dearth of convenience floorspace in the centre. The role of the town as an entertainment and leisure destination has been slowly growing as Appendix 2 illustrates, though the overall percentage is under the national average but may nevertheless provide an indication of the future direction of travel. The use of the Town Centre for well attended and popular cultural events such as ''The Fringe' demonstrate the potential of the Town Centre to host such events. Finally the vitality of the broad retail function of Stroud is underpinned by the in town location of a major, expanding and technologically cutting edge employer, Ecotricity. This latter factor is both a blessing and a curse as the company could easily relocate, as a yet undetermined planning application, at an out of town site adjacent to Junction 13 of the M5 provides such an opportunity.

Nailsworth

3.12 Appendix Two sets out the composition of Nailsworth: it is the second biggest retail centre in the District, but is some three times smaller than Stroud in terms of overall retail outlet count. The survey material shows that since 2005 the overall level of retail units in the centre has remained stable and the retail categories which have achieved most growth are the leisure and miscellaneous categories. The overall balance of retailing, demonstrates a small deficiency against the national average in convenience goods outlets. However it is noteworthy that the centre has been able to retain butchers, a fishmonger, a baker and three supermarket premises to serve the local population's day to day needs. In surveying the Town it is noticeable that there is evidence that it has become a leisure and tourist destination as well as a functional centre. The establishment of premises such as 'Hobbs' evidence this leisure aspect as do other cafes and restaurants, such as 'Wild Garlic' and the abundance of gift shops and independent small fashion retailers. The town has no large-scale representation from comparison national retailers and this confirms that the town's function is as a local centre albeit with a considerable leisure and tourist content.

3.13 The centre has seen the reduction of service units including bank premises, but overall this has not to date adversely impacted on the level of vacancies, which at 5% are well below the national average of 11%. In summary there is scant evidence that e-retailing has had, to date, an adverse effect on the Town. There has been some effect on the town of electronic banking and other service delivery but this has not resulted in a material change to vacancy levels.

Dursley

3.14 Appendix 2 records that at present the overall number of convenience and comparison premises in the Town Centre is broadly similar throughout the survey period from 2005 to 2016. In terms of vacancies there was a small spike in the period of 2009 to 2013 which could perhaps be attributed to the recession in the UK economy but levels have now returned to pre-recession levels.

3.15 The overall balance of retailers in the town provides a solid convenience base to serve the Town's population. During the period recorded by Appendix 2 there has been a closure of two banks, but one of the premises has now been re-opened as a popular cafe. This is in line with a trend which shows a rise in leisure uses in the town. This trend is discernible in all of the towns studied. There has also been a loss of other service outlets such as building societies.

Wotton-under-Edge

3.16 The time series data for Wotton–under-Edge records that in a similar fashion to Dursley the overall balance of retailing between comparison and convenience has remained fairly constant with eight convenience outlets, including two small supermarkets and some 35 comparison stores. In a similar manner to Dursley and Nailsworth there has been a small growth in leisure outlets and similarly to Dursley a fall in service uses. This is reflected in the withdrawal of banks. In the case of Wotton the closure of the Nat West branch left a very significant and visually important building vacant and in poor repair for some years though it is now being renovated to provide a family dwelling.

3.17 It is noteworthy that the level of vacancies in Wotton-under-Edge has grown from some 4% in 2005 to 10% in 2016. This overall level of vacancies is consistent with the other smaller towns studied, with the exception of Nailsworth, but the growth of vacancies is untypical for the towns studied.

Stonehouse

3.18 Stonehouse is the smallest of the Towns studied as measured by the total number of retail outlets, though the second largest Town in the District by population. The percentage of convenience units has remained broadly constant for the eleven year period studied, as has the proportion of comparison units. As with Dursley and Wotton, the overall representation of leisure uses has grown but there has been a more marked reduction in service uses constituting some 10% fall from 2005 until 2016.

3.19 The level of reduction of service uses reflects the effects of e-commerce with a fall in representation by banks and the closing of the post office and its relocation into a sub post office branch within a supermarket.

3.20 The overall levels of vacancies in Stonehouse are currently consistent with the towns studied within the range of 9 to 10% and consistent with the national level of vacancies at 11%, with the exception of Nailsworth, at half of this level.

Summary

3.21 There is a marked difference in both scale and function of Stroud to the remaining towns studied which reflects the Local Plan's hierarchy of centres. The four towns studied excluding Stroud all have a mainly local importance, where the function is to serve the local population's comparison and above all convenience needs. All have and will be in the future affected by the rise in e-banking and the provision of other services electronically.

3.22 Nailsworth, from the survey material, appears to be the most successful with signs that it is developing a leisure and retail offer that is attractive to not only its natural catchment area but a wider tourist function with up market food retailers, restaurants and gift shops.

3.23 Wotton-under-Edge, Dursley and Stonehouse, from survey material, are all providing a local centre function to their catchments; all have suffered from the withdrawal of banking services but their future role is likely to continue, but with perhaps fewer retail outlets. The relative success of Nailsworth may provide some lessons for the other towns and the views of stakeholders will assist in forming judgements and policy responses.

3.24 Stroud perhaps offers the most challenges, with a small convenience offer, a comparison offer that may be under threat by the potential withdrawal of national fascias and the impact of e-retail and competing alternative higher order centres which have significant ongoing investment. The forecast impact is, as discussed above, a marked reduction in demand for comparison floorspace, such that there is likely to be a vacant and growing surplus in the next decade. The service sector is also likely to see a marked decline as national influences continue to have effects. These effects will increase vacancies and if not managed will reduce the overall attractiveness of the town markedly.

3.25 The success of the weekly Farmers Market and the marked growth of the leisure sector from some 45 outlets in 2005 to 61 in 2016 are worthy of further consideration, perhaps signposting a refining of the function of the town.

4 Results of Stakeholder Engagement

4.1 Following the submission of the first four sections of this report to the Environment Committee of Stroud District Council on 16th February 2016 the Committee resolved that stakeholder engagement should be undertaken to assist in producing potential policy responses to the challenges identified. These stakeholder meeting were undertaken in May and June 2017. The results of those meetings are set out below.

Stroud

4.2 A meeting was held on 22nd of May 2017at Stroud Town Council offices and attended by Town Council members and other interested persons including members of the group responsible for the town’s NDP.

4.3 The stakeholders considered that the demographic composition of the Town Centre’s resident population was an issue, with a prevalence of single, unemployed people, whose spending power and positive active engagement in the town’s life both during the daytime and the night time leisure economy was limited. A potential policy response identified by the stakeholders present was to promote increased residential accommodation within the centre, but such new residential floorspace should, it was suggested, be of higher quality and aimed at ‘young professionals’. It was suggested that to achieve this that consideration be given to relax the SDC policy requiring 30% affordable dwellings in new residential schemes.

4..4 The stakeholders considered that there was considerable potential for additional residential accommodation within the Town Centre but recognised that there were difficulties in persuading landlords to rent vacant flats, such as the nine vacant flats in Merrywalks. The stakeholders noted that there were some 450 persons resident in the town centre NDP area, but more could be done, particularly as the NDP was encouraging in this respect.

4.5 Turning to retail activity the group reported that the owner of a local independent comparison shop, 'Moonflower' had conducted a survey and found a surprising number of shops within the town trading without a website, some without even an email address. The stakeholders considered that support to increase retailers' online presence and expertise would be useful.

4.6 The restoration of the canal was considered important and the potential for increased tourism arising from this project was an opportunity but the perceived lack of visitor accommodation was highlighted as a difficulty for this initiative and more generally.

4.7 The stakeholders considered that the image of Stroud was as an 'arty' town rather than a 'foody' destination and the Town Council is commissioning an Arts Strategy to consider the future. The group noted that the amount of commercial filming in and around the town had been increasing. The success of such events as 'The Fringe' and the potential to build on this success is considerable. The future of the Subscription Rooms is currently under review but its importance to the Town as an entertainment venue was recognised.

4.8 The stakeholders considered that policy responses to the future of the town should also focus on women shoppers, noting that a town that works well for women and children, as well as families with provision for good child care and play provision was likely to be successful.

4.9 The stakeholders noted that in 1996 at the time of the Community Planning Conference the condition of the town centre was 'dire' but had improved immeasurably since that period. Reference was made to the study produced by Nicholas Falk of URBED in 2005 considering the night time economy in Stroud which could beneficially be updated.

4.10 The perennial matter of adequacy and cost of parking was raised. The success of the 'Free After Three' initiative was recognised by stakeholders and acknowledged, however, some stakeholders considered that pay and display was less effective in attracting people into the town than a pay on departure regime. The removal of on-street parking restrictions during evening hours and on Sundays was considered to be necessary to improve access to the town's facilities and services.

Nailsworth

4.11 The meeting with Nailsworth Stakeholders occurred on 12th June 2007 and was attended by Town Councillors, the Mayor and the Town Clerk.

4.12 Following a general introduction to the first four sections of the report a stakeholder stated perceptively that: “Places that survive will be places that offer an experience of being in a specific town”.

4.13 This cogent insight presaged a considered debate on the future function of the town as envisioned by the stakeholders. There was recognition that Nailsworth had a very positive brand which could be marketed more effectively, an architecturally attractive town framed by attractive surrounding landscape; with a distinctive football team, now newly promoted to the Football League.

4.14 Whilst there was discussion concerning the adequacy of parking provision, which is free in the Town, there was recognition that if the physical environment of the town was attractive and welcoming then parking, whilst important, was not a matter that should restrict the continuing success of the town.

4.15 However, there was discussion that the town was, by reason of footway conditions, not particularly disabled friendly. There was also concern expressed about recent GCC highway and associated ‘improvements’ in the town, where the stakeholders considered that the funds used could have been better spent if their Council had either been meaningfully consulted or had some control over the budget. There was also a belief that the well-used cycle track leading into the town should have remedial work to the surface and appropriate signing as the track approached the town.

4.16 The stakeholders felt that town centres should have a long-term plan which included specific design guidance. The future role of SDC in the promotion of the town was discussed and it was generally considered that the role of SDC and the Town Council should be as facilitators and not the ‘doers’.

4.17 There was discussion about successful events that had now been abandoned, ‘Nailstock’ was recognised as being a good event but the group considered that a festival calendar should be drawn up and publicised.

Dursley

4.18 Representatives of Dursley Town Council met with the report author on 14th June 2017 to discuss and comment upon the initial four sections of this report. As part of this stakeholder meeting the representatives from the Town Council drew attention to a published 2014 study produced by ‘Hidden Britain’ entitled ‘Tourism Development in Dursley’. The document notes that the town is attractive with a historic Market House and that the ‘quality of the streetscape is very good’. The study notes that ‘The town is extremely well positioned to attract walkers on the Cotswold Way’, a matter that was picked up by the stakeholders and is reported later in this section.

4.19 The study recognises that there is little information targeted at visitors in terms of signage or advice and considers that there is scope to sign and upgrade the library as a visitor information point in the absence of a tourism information centre. The infrastructure of the town would be strengthened by both publicity for tourist accommodation and additional accommodation.

4.20 Many of the themes in the Hidden Britain document were discussed at the stakeholder meeting, with a recognition that there was a continued need for additional tourist accommodation, and moreover the need for the emergence of a comprehensive internet presence which allowed, via hyperlinks, visitors to access accommodation, dining and event choices and information. The stakeholders noted that there was a relatively newly formed steering group ‘The Cotswold Edge and Severn Vale Tourism Network’. However web content depended on volunteer input and whilst was an example of a local initiative, it had yet to make a significant impact.

4.21 The stakeholders noted that the Town had a business group Dursley Business Inclusive which is a member of the Association of Gloucester Business Groups along with Stroud and Wotton-under-Edge Chambers of Trade and Commerce and a newly formed networking group ‘Join the Dots’ aimed at promoting hidden opportunities to support business.

4.22 The importance of the Cotswold Way to the Town was stressed by stakeholders and making Dursley a recognised waypoint for refreshment and accommodation was seen as a future priority of the Town together with maintaining its function as a destination for its resident population.

4.23 The stakeholders considered that additional emphasis could be put into the utilisation of the historic market building and curtilage as a market, noting that it was not as successful as the Stroud Farmers Market.

4.24 The ‘eating out’ and leisure offer in Dursley was considered to be mixed with some establishments reflecting a past era being unattractive to some age groups.

4.25 In terms of parking, the stakeholders reported that generally there was sufficient supply but a new planning application for a long stay car park on the former Bailey Newspapers Group site on Long Street would, if approved, allow the car parks nearest the centre to function as short stay parking.

4.26 The stakeholders considered that the Town, and indeed other Towns, would benefit from a permissive planning regime which encouraged small scale offices to be easily established as a bridge between home working and more substantial premises with longer more formalised leases.

4.27 The stakeholders were firmly in favour of encouraging residential units to be established, either new build or conversions from other uses close to the Town centre.

Wotton-under-Edge

4.28 The meeting with stakeholders in Wotton took place on 25th May 2017 at the Town's Civic centre. The meeting was attended by members of the Town Council as well as members of the Chamber of Trade and Commerce.

4.29 Following the meeting, a written submission was received from a long standing local trader recounting, in some detail, the history of his particular premises and drawing attention to the needs of his and other businesses in the Town to have improved parking provision. The issue of parking provision in the Town was also a matter that some stakeholders felt deeply about. The Wotton Community Plan update 2016 in its review of the Town notes: 'Our high street businesses have been hit by the recession, by structural changes in banking, by the growth in online shopping and home deliveries, by the acute lack of parking for cars and tourist coaches, by the lack of a supermarket with a trolley to car service and by the building of rival stores in Chipping Sodbury, Yate, Dursley, Thornbury, Tetbury and Nailsworth , as well as the growth of Cribbs Causeway'.'

4.30 The parking issue was of particular current interest to some stakeholders as a planning application to increase parking in the Town had recently been withdrawn and prior to its withdrawal had engendered considerable debate and dissension in the Town.

4.31 The stakeholder group considered that aside from the role of the Town Centre serving the resident population the future of the Town lay in supporting tourism. The stakeholders understood the value of the assets of the Town, the Cotswold Way, the history of the Town and environs, the visually attractive High Street, the town cinema and swimming pool. However there was a view expressed that the town's location at the southern edge of Stroud District Council's area meant that it looked to the South and was perceived as such by the local population, to the greater Bristol area rather than the town being the gateway to the Cotswolds.

4.32 The tourist information centre was reported as being well used with a steady demand for printed information. The festivals that have been run in the town have been well supported and the Town Council's web site has been refreshed.

4.33 Stakeholders felt that whilst individual initiatives had been successful there was a need for a co-ordinated approach to market the Town more widely, to focus a wider audience on its undoubted assets as a base to explore the southern Cotswolds Scarp area, its history, and of course the Cotswold Way which was an attraction of both national and international importance. The stakeholders considered that co-operation with marketing with the other Towns in Stroud District Councils area located on the Cotswold Way would be important.

4.34 Turning to the retail sector, the stakeholders considered that the Town was fortunate to have retained a good range of shops that served the population's day-to-day needs. However, as highlighted in the Community Plan Update, competition was fierce with higher order centres and e-retailing which had left some stakeholders nervous of the town's ability to retain a retail base sufficient to serve day to day needs, particularly as some stakeholders considered that the town was developing into a dormitory town with physical retail activity being undertaken on the journey to and from work. As noted in the previous section, the growth in retail vacancy rates in the town had been the highest of any of the towns studied, from 4% to 10%, potentially indicating that the concerns of the stakeholders are well-founded.

4.35 The stakeholders understood that individual retailers in the town who had invested in e-retailing had benefitted from that investment and drew attention to the availability of training to set up sites. However, it was noted that individual retailers had not always been receptive to this form of trading and there was resistance to engagement.

4.36 The stakeholders noted that the top of the High Street is now devoid of retail premises with the closure of the bakery and Nat West Bank, and suggested that there could be a case for redefining the core shopping area. Generally, the return to residential use of the former Nat West Bank was welcomed as this very significant building was once again in use. However, stakeholders were nervous of the precedent that this change of use could set.

4.37 The stakeholders also identified that they had an active and large Chamber of Trade and Commerce, the biggest in the District but the organisation had been reducing in membership and had recently been left leaderless with the President stepping down. There was concern that the Chamber was finding it difficult to recruit and retain local retailers, as many retailers are not resident in the town.

Stonehouse

4.38 The meeting with the stakeholders at Stonehouse took place on 10th April 2017 at Stonehouse Town Council offices. Prior to the meeting the clerk to the Council sent a SWOT analysis carried out by the Council together with a list of identified needs as follows:

- There is a need for a core centre to the parish;
- There is a need for local shops which are accessible to all;
- There is a need for better community liaison through a Chamber of Commerce and/or Town Centre Manager, business advice (particularly for failing businesses) and grants from District/County Council for shop front improvements, events etc;
- There is a need for a review of car park charges and/or the use of the revenue from those charges.

The SWOT analysis produced by Stonehouse Town Council is reproduced below:

Stonehouse	
Strengths	**Opportunities**
Central car park	Free car park might encourage trade
Gateway to Stroud from M5	Promotion from M5 entry points
Central rail station	Refreshment/toilet facilities
Small property units	Small business/office space/pop-up shops
Road frontage	Exploit for outdoor eating
Town greens	Food markets
Town events	Wider promotion
Neighbourhood shopping for travel restricted families	Health shops or artisan retailers
Some attractive buildings	Discourage virtual library/cashpoints
Links to countryside	Encourage residential redevelopment
	Exploint Cotswold Way/cycle paths
	Employment area nearby
Weaknesses	**Threats**
Social housing and low incomes	Ship Inn site bland development
Bypassed by A419	Ratrun to M5
Lack of cultural identity	Lack of S106/CIL funding
Unattractive shop fronts	Empty units increase desolation
No tourism offer	Disconnection from canalside
No Chamber of Commerce	Lack of investment in joint efforts: In Bloom
Planning restrictions	Large out-of-town retailers
Fast food outlets. Pubs are not gastro pubs	Retail parks taking employment space

4.39 The stakeholders confirmed that they generally agreed that the initial four sections of the report that was sent to them reinforced their view that change was inevitable.

4.40 The group considered that the Town Centre was important in two respects, firstly to provide a facility for local people to access services and undertake retail activity, but secondly a social function, as a leisure destination.

4.41 The stakeholders expressed concern that a historically active Chamber of Commerce and Trade was now not active. The main resident-led group that was active was Rotary but their efforts spread beyond a concentration on Stonehouse.

4.42 The stakeholders felt that a music event would be well supported but funding was an issue. The stakeholders were keen to have a market in the town but felt that they could not compete with Stroud's Saturday market. The stakeholders also noted that the existing public houses were not particularly inviting to a broad range of people, particularly families.

4.43 The group also considered that the existing signage both for motorists and cyclists/pedestrians was inadequate and improvement would exploit the town's relationship to the canal and the Cotswold Way.

4.44 Parking in the Town Centre was a matter that the group held passionate views about. The thrust of their argument was that since the demise of a travel company, Travelscope, with a considerable consequential reduction in demand for car park spaces, the supply of spaces in the SDC car park now exceeded demand. As parking fees were imposed to regulate parking in a situation of demand exceeding supply there was a strong case that parking fees should be dispensed with.

4.45 There was some discussion concerning the attitude to applications within the Town Centre for change of use of former retail premises to residential. In summary, the re-use of vacant retail premises was seen as a less than optimal outcome with the stakeholders preferring to see the retention of shop units.

4.46 The stakeholders expressed concern that the major impact on Stonehouse that was going to occur with the development of the major urban extension known as Land West of Stonehouse was not going to provide any community benefit to the Council by reason of its being excluded by the CIL charging schedule and not benefitting from the terms of the Section 106 agreement. There was also strong support voiced by stakeholders to re-opening of the Bristol Road station.

4.47 The stakeholders considered that SDC should consider employing an officer to act as a catalyst to positive action in Town Centres across the District with a source of funds to be applied to town centres to reduce business rates, provide shopfront grants and support events, stalls and advertising.

5 Consideration of Stakeholders' Responses and Potential Areas for Policy Responses

5.1 In the introduction to this report it was stated that following the examination of national trends, a review of current national, local and neighbourhood Town Centre Policy, a review of current data on each town and stakeholder engagement that a Strength, Weaknesses, Opportunities and Threats analysis (SWOT) for each Town would be undertaken prior to considering potential policy responses.

5.2 It is recognised that two such SWOTs exist already, one for Stroud and the other for Stonehouse. The latter is set out in the text of the previous section and is the work of the Town Council whilst the former is set out in Appendix 1 being an extract from the Stroud Town Centre Neighbourhood Plan.

5.3 Given the individual nature of each of the settlements the likely policy responses will most likely be successful if they are generally specific to each town and address the weaknesses and opportunities of each settlement.

Research[11] and commentary has identified that Town Centres need to build on their existing strengths, their history, heritage and natural surroundings. Published plans are by definition planning documents which look to spatial policy, whereas the protection/mitigation and invigoration of a town from the potential threats that have been identified in this report will need a broader based response, utilising potentially fiscal and leadership stimuli.

Stroud

5.4 The SWOT for Stroud accurately reflects the evidence of the current state of the Town gained from the analysis of data and the stakeholder engagement. The SWOT is taken from the Town Centre NDP and is set out at Appendix 1 however the analysis does omit several matters:

- The lack of a significant permanent ‘convenience’ offer within the Town Centre;
- The concerns of stakeholders relating to the size and quality of residential accommodation within the Town centre.
- The analysis also fails to consider the potential threat of Ecotricity moving out from their town centre base.

5.5 Turning first to physical land use policies, the Town Centre NDP in terms of spatial policy addresses the issues raised in the SWOT and provides both policies to protect the town from ill-thought-out development and physical projects that have been chosen to enhance the Town. Those positive projects are an ambitious list, even given that they are divided into three time categories: short 5 years, medium 10 years and long, 20 years, relying on CIL receipts and/or S106 funds with the uncertainties within the UK economy with Brexit and the vagaries of change to CIL arrangements. Nevertheless, these are physical projects which have been carefully considered in the light of a recognised plan making process and supported by the population.

5.6 The missing element that is not considered in the physical plan, although alluded to, is the role of the town in the future. The Town will in the future continue to function as the major centre for the District, but the challenges of e-retail and the attraction of higher order centres present a threat and an opportunity. The NDP identifies the cultural importance of the town providing a home for an established nationally and internationally recognised creative community. However, there is a need to consider a conscious brand focus for the town and to produce an action orientated marketing plan to further that focus.

5.7 It is suggested by the stakeholders, with considerable justification, that the appropriate focus should be the arts. That ‘brand’ Stroud should be marketed with that focus on the arts linked to the fact that it is an attractive Cotswold town on the Cotswold Way, matters often underplayed or even ignored in the perception of the settlement. The current state of marketing of the town relies on the Cotswold Tourism Partnership and other

[11] 21st Century High Street British Retail Consortium 2009.

Cotswold-wide sites together with the District Council, and the national trails website featuring the Cotswold Way. All those bodies focus on a wider area than the Town.

5.8 As a consequence, it is recommended that the Town Council take the lead in co-ordinating and enhancing the marketing effort for the town.

5.9 The priorities for that role are to consider the existing coverage and also enhancing the existing Town Council website to include additional information and relevant hyperlinks focusing on the role of the town as a centre for the creative arts and crafts, advertising events, and providing links to tourist accommodation, and dining opportunities.

5.10 Turning to the Town’s retail function the introduction of retailers to the advantages of e-retailing, linking to social media and assistance with setting up websites will help to protect the health of the town’s retail function. This is an area where as there is a commonality of requirement between all five Towns, to a greater or lesser extent, the action should be facilitated by SDC, with assistance from each of the Town Councils and where active the individual Chambers of Commerce and Trade.

5.11 The car parking issues and charging regimes are recommended to be addressed for all the settlements that raised the issue by SDC as part of an overall review of District wide parking strategy which is understood to be being considered. The need identified in Stroud to better serve a ‘night time’ economy by varying or eliminating existing Traffic Regulation Orders (TRO’s) should be taken up by SDC as a facilitator with the County Highway Authority to define and produce a plan to deliver this change together with improvements to footways for pedestrians.

5.12 The missing elements of the SWOT analysis within the NDP identified above that were either raised by stakeholders or identified during the compilation of this report are generally not matters where the levers of influence rest with any public body. However, a successful prosperous town will set a context for increasing activity and potentially new convenience outlets to serve both the resident population but also the increased tourist footfall. Similarly, a successful town will make the desire for a dominant employer to move out less likely and even if that were to occur the town will be more resilient to weather the impact. A successful town centre will attract new residential development because there will be demand to live there.

5.13 As the District-wide adopted Local Plan is currently being revised, it is recommended that with the likely demand for retail floorspace declining in the next plan period for all the five settlements studied that the review considers amending the defined primary shopping frontage and the Town Centre’s boundaries.

Nailsworth

5.14 There is an opportunity to improve the Town Square area with refurbishment or redevelopment of retail units, enhancing the public realm and providing residential units above the ground floor retail outlets.

5.15 The lack of maintenance of the surface of the cycleway from Stroud along the valley was commented upon, as was the lack of signage on the path when entering the Town. It is recommended that these matters are addressed by the County Council as Highway Authority and the Town Council in conjunction with the Highway Authority. Similarly the concern expressed by stakeholders on the condition of footways within the Town is a matter for the County Council. The overall concerns on the physical condition and state of maintenance of highway infrastructure together with the complaint that the allocation of resources by the Highway Authority are made without recourse to the Town Council could be resolved by regular scheduled meetings with the Highway authority to discuss and consult on their ongoing maintenance programme.

Dursley

5.16 Following the stakeholder engagement reported at section five of this document the SWOT analysis is set out below:

Dursley	
Strengths	**Weaknesses**
Attractive built environment	Little tourist information either physical or electronic
Attractive landscape setting for Town	Signage
On route of Cotswold Way	Long stay car parking
Good range of convenience offer	Lack of tourist accommodation
	Coherent marketing of Town
Opportunities	**Threats**
Focus on tourism	Brexit
Planning Application submitted for long stay car park	Withdrawal of further service units
Newly launched tourism group	Existing market not sufficiently regular
Demand for small B1 offices on very short tenancies	Economic downturn
Market facilities at historic market hall	e-retailing
Build on nascent cafe and food culture	
Support for new residential adjoining and in town	

5.17 Dursley Town Council has in recent times made efforts to join with other communities to support a new marketing initiative. However, in common with all the towns studied there is an electronic marketing deficit. It is recommended that SDC involve itself in assisting larger towns such as Dursley to link their websites with the wider SDC tourism network and also the larger marketing bodies covering the Cotswolds and the Cotswold Way.

5.18 The signposting of car parks in the Town to enable motorists to differentiate between long and short stay car parks is recommended as well as specific signage for visitors arriving via the Cotswold Way to inform walkers of the Town's attractions.

5.19 The historic and attractive market hall as a focal point of the town is underused. The use of the space for markets that would attract specific trips by residents and tourists is sporadic. A programme of events for that space planned well in advance and widely disseminated would be very worthwhile and link in with the recommendation to review and improve the electronic marketing of the Town.

5.20 The present tourist information is handled by the current library staff on a volunteer basis giving information to visitors; the service relies on the good will of library staff and is not advertised. It is recommended that this service is formalised with as noted above in town signage directing visitors to the library on the basis that the current position can be formalised.

5.21 The changes to the world of work highlighted by the stakeholders require careful consideration. Many small businesses start out by being based at home, however may then, for various reasons, not least the availability of space in modern homes, require an office. The problem is that office availability in small towns is limited and normally what is available is too large for start-ups and require considerable commitment in terms of lease length. Given that the SDC Local Plan is currently under review and that there is likely to be further loss of service use floorspace in all the town centres studied, there is an opportunity to consider whether non retail use policies in the current plan restricting alternative uses to those within the A use class should be amended to allow at ground floor within town centres small scale offices offering flexible rental terms and space.

Wotton-Under Edge

Wotton-under-Edge	
<u>Strengths</u>	**<u>Weaknesses</u>**
On the Cotswold Way	Percentage rate of growth of retail vacancies
Very attractive town	Likely continued loss of service users
Town set in attractive landscaped setting	'A hidden gem
Considerable historic interest	Chamber of Trade large but ineffective
Good range of independent traders	Advantages of e-retailing not widespread
Community website	
Tourism information premises	
Community assets: cinema and swimming pool	
<u>Opportunities</u>	**<u>Threats</u>**
Tourism role in Town	Brexit/Economic slowdown

'Big Up' Town	e-retailing
	Role of Town perceived as commuter town
	Loss of trade by reason of parking

5.22 The stakeholders recognised that Wotton has a considerably advantageous setting and a history that provides heritage assets which reflect that history back to the 12th Century. In addition the town has a manned tourist information centre, is on the route of the Cotswold Way and has both an active community web site and large Chamber of Trade. However the Town has in the past ten years experienced the highest growth rate of vacant retail premises, from some 4% to 10%. Whilst this latter figure mirrors the national average the growth rate of vacancies is a matter of concern.

5.23 The role of Wotton is both perceived to be within the Town Council and in reality a commuter town. The retail offer is varied but parking supply and the growth of other centres have taken their toll.

5.24 Given this situation as identified by the stakeholders the town badly needs exposure to a wider tourism focused market. The recommendation that a review of web sites and the linkages between them in marketing the area has been a consistent theme for all the towns and also applies to Wotton. SDC is undertaking a parking review and the adopted Local Plan is being reviewed with an expectation that potential remedies to the current situation will be found.

5.25 The advantages of e-retailing for individual traders is clear and within Wotton there are good example in kitchenware and country pursuits stores who flourish in spite of having a restricted population catchment. The Town Council should seek to identify traders without effective email/website or e-selling platforms so that the advantages can be demonstrated and advice given. The Chamber of Trade could provide assistance with this initiative.

Stonehouse

5.26 The SWOT analysis for Stonehouse was presented by the Stakeholders at the previously reported meeting and is set out in the previous section, however it is reproduced below to aid the reader:

Stonehouse	
Strengths	**Opportunities**
Central car park	Free car park might encourage trade
Gateway to Stroud from M5	Promoation from M5 entry points
Central rail rtation	Refreshment/toilet facilities
Small property units	Small business/office space/pop-up shops

Road frontage	Exploit for outdoor eating
Town greens	Food markets
Town events	Wider promotion
Neighbourhood shopping for travel restricted families	Health shops or artisan retailers
Some attractive buildings	Discourage virtual library/cashpoints
Links to countryside	Encourage residential redevelopment
	Exploint Cotswold Way/cycle paths
	Employment area
Weaknesses	**Threats**
Social housing and low incomes	Ship Inn site bland development
Bypassed by A419	Ratrun to M5
Lack of cultural identity	Lack of S106/CIL funding
Unattractive shop fronts	Empty units increase desolation
No tourism offer	Disconnection from canalside
No Chamber of Commerce	Lack of investment in joint efforts: In Bloom
Planning restrictions	Large out-of-town retailers
Fast food outlets. Pubs are not gastro pubs	Retail parks taking employment space

5.27 The SWOT analysis demonstrates that some of the concerns applicable to Stonehouse are capable of being addressed as part of the recommendations that are relevant to each of the settlements.

5.28 In particular the parking study that is being initiated by SDC will pick up the perceived parking issue in Stonehouse that the supply of parking exceeds demand and therefore the justification for parking fees in the town will be reviewed.

5.29 Similarly, the tourism issue, in part, will be addressed by reviewing the existing web based coverage and introducing hyperlinks to aid visitors.

5.30 The perceived ‘isolation’ of Stonehouse from the A419 and in particular the canal can be addressed by undertaking discussions with the County Council Highway Authority to consider upgraded signage and in due course the Canal Trust who will be recipients of monies from the Section 106 from Land West of Stonehouse to be spent on towpath upgrade which could include signage.

5.31 The lack of a Chamber of Trade is a weakness in the Town, as ‘in town’ activities need an active community. This matter is one which is in the hands of the Town Council to assume a leadership role to try and engender community activism including resurrecting the Chamber of Trade.

5.32 The recent losses of banks have been a blow to the town but it is to be expected that there will be further losses of service uses. The current level of retail vacancies is not inconsistent with national averages; however the

Town needs to actively pursue a role over and above one to service its' catchment population. The Town, whilst being set in an attractive setting, is at a disadvantage to the other settlements as the quality of the setting is less advantageous. Its location 'just off the Motorway' probably offers the best opportunity to maintain its health. Enhanced highway signage and marketing will have a beneficial effect.

5.33 The impact of relatively nearby retail stores is a matter concerning to the stakeholders, however perversely as the town has areas of social housing and low incomes these factors have assisted the town in keeping local shopping not requiring the use of private cars.

5.34 The stakeholders' identified need for small office spaces are similar to those heard by the stakeholders in Dursley and can be dealt with by consideration of revised policy in the review of the Local Plan currently being undertaken.

Summary of Potential Policy Responses

5.35 This final section of the report will be divided between recommended policy responses which are applicable to all the Towns studied and individual policies applying to specific towns.

5.36 The recommended policy responses will be divided into land use recommendations and non spatial potential actions.

5.37 The District-wide recommendations for potential spatial policy examination are as follows;

- Review of Town Centre boundaries, having regard to the likely effect of at least static or even falling net demand for retail floorspace, taking into account reduction of some categories of service uses.
- Review of primary shopping frontage's designated areas, having regard to changes that have occurred and may occur during the next ten years.
- Consideration of forming planning policy that will be permissive to the encouragement of small Town Centre office uses which provide individual small work spaces with flexible rental arrangements.
- Permissive policy to encourage the regeneration/redevelopment of sites identified in NDPs and other identified opportunities in each of the Towns.

5.38 In terms of non spatial policy it is a common theme for all the Towns studied that there is a noticeable deficit in terms of marketing of the individual towns and their cultural and leisure events and the lack of hyperlinks between regional websites, such as Cotswold tourism, and the Cotswold Way, SDC's own tourism site and the websites of the various towns. It is therefore recommended that SDC act as a facilitator to review with individual Town Councils their web sites content and to produce recommendations for both improvements to individual websites and the creation of hyperlinks.

5.39 The ongoing review of SDC parking policy in the Towns studied should be produced as soon as possible having regard to levels of demand and the advantages and disadvantages of rationing of spaces by the imposition of charges.

5.40 It is recognised that the individual Chambers of Trade and Commerce can with Town Councils provide a leadership role in their respective communities. However. the Chambers of Trade in the towns studied are not necessarily in a healthy state. In order to re-invigorate and encourage Chambers of Trade it is recommended that SDC acting as a facilitator of economic growth seek to engage with all the Chambers and the Town Councils with the aim of assisting the Chambers to co-operate with their respective Town Council'

5.41 The lack of awareness by individual traders to the advantages of having a website capable of selling on line and the potential for social media is widespread in the towns studied. It is recommended that SDC acting as a facilitator assisted by the Town Councils and Chambers of Trade undertakes a project to educate and assist individual traders to join the 'electronic age'.

5.42 In terms of Town specific policy:

5.43 **Stroud**

- SDC to approach the Highway Authority to remove TROs within the town to boost the night time economy.
- SDC and the Town Council to discuss with the Highway Authority the provision of signage to assist motorists in locating car parks.
- SDC to review the areas in the Local Plan designated for primary and secondary frontages.
- SDC to support the re-invigoration of Merrywalks.
- SDC to support, allied to local groups including the Town Council, the advancement of the role of the arts and leisure in the Town Centre.
- SDC to support the physical improvements of the Town Centre as detailed in the NDP.

5.44 **Nailsworth**

- The Town Council to be encouraged by SDC to draw up a long term plan for the town centre;
- SDC acting as a facilitator to host a meeting with the Town Council and the Highway Authority with the aim of setting up a forum for regular contact between the Town council and GCC so that local consultation on spending plans by GCC can be consulted on with the Town Council.
- SDC to consider promoting improvement to the Market Street area including redevelopment of the existing retail area to produce an improved townscape with the potential to provide enhanced public

spaces and residential development over shops.

5.45 **Dursley**

- SDC, the County Council and the Town Council to initiate a project to enhance the signage in the town for pedestrians and cyclists.
- SDC to engage with GCC Highways and Town Council to improve highway signage for motorists seeking parking.

5.46 **Wotton-under-Edge**

- SDC to initiate a meeting with the Town Council and other interested parties ahead of the publication of the District wide review of parking to consider potential solutions to the particular issues in the town.

5.47 **Stonehouse**

- SDC to initiate discussions in consultation with the Town Council with GCC to seek 'brown' tourist signs to be erected on the A419 to indicate the availability of the Town's services to motorists on that road.
- SDC to initiate discussion with Highways England to amend signage at Junction 13 to introduce 'brown signs' advertising directions to Stonehouse's attractions.

Appendix 1: Stroud

Source Stroud Town Centre NDP 2016

Strengths Weaknesses Opportunities Threats (SWOT) analysis

Strengths

Markets.

Independent shops.

Canalside improvements.

Pedestrianised areas.

Parks.

Cultural street life and festivals.

Countryside setting.

Cafés.

Historic features.

Subscription Rooms.

Community expertise, experience, energy and enthusiasm.

Opportunities

Ongoing investment in the canal regeneration.

Significant amount of undeveloped and underused land close to the town centre.

Successful Farmers' Market bringing shoppers into the town centre.

Popular festivals and cultural activities bringing people into the town centre.

Growth of Ecotricity in the town centre.

Redevelopment of Market Tavern.

Improved rail links.

Stroud defined as 'Principal Town Centre' in Local Plan.

Weaknesses

Quality of the shopping facilities.

Appearance of the streets.

Appearance of key buildings such as Merrywalks multi-storey car park and the cinema.

Traffic congestion.

Parking charges.

Anti social behaviour.

Pedestrian/vehicle conflict.

Condition of roads and pavements.

Empty shops.

Barriers to ease of movement between canal and town centre.

Poor 'legibility' into and around the town centre.

Lack of effective delivery on plans and projects.

Threats

Out of centre retail developments take shoppers and investment away from town centre.

Competition from other centres such Gloucester, Cheltenham and Cirencester.

Growth of internet and phone shopping.

Congestion discourages people from coming to the town centre to shop, enjoy cultural and leisure activities.

Historic character continues to deteriorate.

Lack of connectivity between canal and town centre undermines regeneration.

Appendix 2

Summary Time Series Data

Stroud

	Convenience		Comparison		Service		Leisure		Miscellaneous		Vacant		Total
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number
20-Oct-05	11	4	107	38	67	24	45	16	35	12	20	7	285
20-Oct-06	11	4	109	38	68	23	47	16	32	11	23	8	290
20-Oct-09	16	5	101	35	68	23	44	15	31	11	32	11	292
09-Nov-12	16	5	108	34	71	22	56	18	37	12	29	9	317
25-Jul-13	15	5	108	34	70	22	56	18	36	11	32	10	317
16-Jul-14	13	4	110	35	72	23	58	18	38	12	27	8	318
07-Dec-16	12	4	111	35	69	22	61	19	36	11	31	10	320
GB Jan 17		13		29		27		25		6			
GB Jan 17 Vacancy Rate												11	

Notes:

Surveys from 2012 to 2016 inclusive include all town centre commercial properties, some of which were excluded from earlier reports

GB data from Local Data Company. All currently live businesses in the area, counts split by classification

Convenience: Bakers. Butchers & Fishmongers. Confectionery, Tobacco, Newsagents. Groceries, Supermarkets & Food Shops. Off Licences. Petrol Filling Stations.

Comparison: Books, Arts & Crafts, Stationery, Printers. Car & Motorbike Showrooms. Charity & Secondhand Shops. Chemists, Toiletries & Health. Department Stores & Mail Order. Discount & Surplus Stores. DIY, Hardware, Builder's Merchants & Household Goods. Electrical Goods & Home Entertainment. Fashion & General Clothing. Florists & Garden. Footwear. Furniture, Carpets, Textiles, Bathrooms & Kitchens. Gifts, China & Leather Goods. Jewellers, Clocks & Watches. Pet Shops & Pet Supplies. Sports, Toys, Cycle Shops & Hobbies.

Service: Auto & Accessories. Auto Services. Banks, Financial Services & Building Societies. Employment & Post Offices. Estate Agents & Auctioneers. Hairdressing, Health & Beauty. Household & Home. Launderettes, Dry Cleaners & Other. Locksmiths, Clothing Alterations & Shoe Repairs. Pawnbroking & Cheque Cashing. Travel Agents & Tour Operators.

Leisure: Accommodation. Bars, Pubs & Clubs. Cafes & Fast Food. Entertainment. Restaurants.

Miscellaneous: Medical. Non-Retail. Transport.

Nailsworth

	Convenience		*Comparison*		*Service*		*Leisure*		*Miscellaneous*		*Vacant*		*Total*
	Number	%	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*
19-Oct-05	*12*	*11*	53	49	24	22	10	9	3	3	6	6	108
19-Oct-06	*12*	*11*	52	48	23	21	10	9	2	2	9	8	108
20-Oct-09	*13*	*12*	52	47	23	21	11	10	3	3	9	8	111
25-Oct-11	*14*	*13*	54	50	23	21	11	10	2	2	5	5	109
30-Nov-12	*14*	*13*	54	49	22	20	12	11	4	4	5	5	111
18-Jul-13	*14*	*13*	56	50	21	19	15	13	4	4	2	2	112
18-Jul-14	*14*	*13*	56	50	21	19	14	13	5	5	1	1	111
22-Sep-16	*12*	*10*	50	43	25	22	16	14	7	6	6	5	116
GB Jan 17		*13*		*29*		*27*		*25*		*6*			
GB Jan 17 Vacancy Rate												*11*	

Notes:

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GB data from Local Data Company. All currently live businesses in the area, counts split by classification

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Service: Auto & Accessories. Auto Services. Banks, Financial Services & Building Societies. Employment & Post Offices. Estate Agents & Auctioneers. Hairdressing, Health & Beauty. Household & Home. Launderettes, Dry Cleaners & Other. Locksmiths, Clothing Alterations & Shoe Repairs. Pawnbroking & Cheque Cashing. Travel Agents & Tour Operators.

Leisure: Accommodation. Bars, Pubs & Clubs. Cafes & Fast Food. Entertainment. Restaurants.

Miscellaneous: Medical. Non-Retail. Transport.

Dursley

	Convenience		Comparison		Service		Leisure		Miscellaneous		Vacant		Total
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number
19-Oct-05	8	7	30	28	29	27	13	12	16	15	11	10	107
19-Oct-06	9	8	33	31	31	29	13	12	17	16	4	4	107
20-Oct-09	7	7	29	28	28	27	13	13	14	13	13	13	104
25-Oct-11	7	7	28	27	27	26	13	13	13	13	16	15	104
20-Nov-12	7	7	28	27	28	27	13	13	16	15	12	12	104
22-Jul-13	7	7	28	27	27	26	15	15	15	15	11	11	103
22-Jul-14	7	7	30	29	27	26	15	15	15	15	8	8	102
04-Oct-16	7	7	30	29	26	25	15	15	15	15	9	9	102
GB Jan 17		13		29		27		25		6			
GB Jan 17 Vacancy Rate												11	

Notes:

Surveys from 2012 to 2016 inclusive include all town centre commercial properties, some of which were excluded from earlier reports

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Leisure: Accommodation. Bars, Pubs & Clubs. Cafes & Fast Food. Entertainment. Restaurants.

Miscellaneous: Medical. Non-Retail. Transport.

Stonehouse

	Convenience		Comparison		Service		Leisure		Miscellaneous		Vacant		Total
	Number	%	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*
19-Oct-05	6	9	19	28	21	31	12	18	8	12	2	3	68
19-Oct-06	7	10	17	25	20	29	12	18	8	12	4	6	68
10-Sep-09	7	10	18	26	19	28	13	19	8	12	4	6	69
07-Nov-12	6	9	21	30	17	25	14	20	7	10	4	6	69
17-Jul-13	6	9	22	32	17	25	14	20	9	13	1	1	69
17-Jul-14	6	9	21	30	18	26	15	21	9	13	1	1	70
17-Nov-16	7	10	19	27	15	21	14	20	9	13	6	9	70
GB Jan 17		*13*		*29*		*27*		*25*		*6*			
GB Jan 17 Vacancy Rate												*11*	

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Leisure: Accommodation. Bars, Pubs & Clubs. Cafes & Fast Food. Entertainment. Restaurants.

Miscellaneous: Medical. Non-Retail. Transport.

Wotton-under-Edge

	Convenience		*Comparison*		*Service*		*Leisure*		*Miscellaneous*		*Vacant*		*Total*
	Number	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*
19-Oct-05	*9*	*10*	*36*	*40*	*25*	*28*	11	*12*	5	*6*	4	*4*	90
19-Oct-06	*9*	*10*	*37*	*41*	*25*	*28*	11	*12*	5	*6*	3	*3*	90
11-Nov-09	*9*	*10*	*34*	*38*	*25*	*28*	11	*12*	5	*6*	5	*6*	89
31-Oct-11	*8*	*9*	*34*	*39*	*25*	*28*	12	*14*	3	*3*	6	*7*	88
30-Nov-12	*9*	*10*	*31*	*34*	*27*	*30*	11	*12*	5	*6*	7	*8*	90
19-Jul-13	*10*	*11*	*31*	*34*	*27*	*30*	11	*12*	4	*4*	8	*9*	91
22-Jul-14	*9*	*10*	*34*	*37*	*27*	*29*	11	*12*	2	*2*	9	*10*	92
27-Oct-16	*8*	*9*	*35*	*39*	*23*	*26*	12	*13*	3	*3*	9	*10*	90
GB Jan 17		*13*		*29*		*27*		*25*		*6*			
GB Jan 17 Vacancy Rate												*11*	

Notes:

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Service: Auto & Accessories. Auto Services. Banks, Financial Services & Building Societies. Employment & Post Offices. Estate Agents & Auctioneers. Hairdressing, Health & Beauty. Household & Home. Launderettes, Dry Cleaners & Other. Locksmiths, Clothing Alterations & Shoe Repairs. Pawnbroking & Cheque Cashing. Travel Agents & Tour Operators.

Leisure: Accommodation. Bars, Pubs & Clubs. Cafes & Fast Food. Entertainment. Restaurants.

Miscellaneous: Medical. Non-Retail. Transport.

Appendix 3

The Potential Effect on Demand for Comparison Floorspace in Stroud 2016 to 2031.

TABLE 1: COMPARISON GOODS CAPACITY, 2016-2031

Stroud (including commitment)

	2016	2021	2026	2031
Available comparison goods expenditure	£603.0	£665.5	£795.1	£946.9
Turnover from study area	£100.5	£110.7	£132.0	£156.8
Market share	16.7%	16.6%	16.6%	16.6%
Expenditure inflow	£6.0	£6.6	£7.9	£9.4
Total turnover potential	£106.5	£117.3	£139.9	£166.2
Benchmark turnover of existing and committed facilities	£106.5	£116.9	£130.6	£145.6
Commitment	£7.6	£8.4	£9.3	£10.4
Residual expenditure	**-£7.6**	**-£7.9**	**-£0.1**	**£10.2**
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,275	£5,789	£6,467	£7,211
Indicative retail floorspace capacity (sq m net)	**-1445**	**-1372**	**-10**	**1417**

Notes:

Total expenditure taken from Table 5f.
Turnover from study area taken from Tables 9a-9d.
Market share is the turnover from study area expressed as a percentage of total available expenditure.
Expenditure inflow based on assumptions made in 2010 and 2013 Retail Study.
Total turnover potential is the study area derived turnover plus expenditure inflow.
Benchmark turnover at 2016 assumed to match total turnover potential, projected forward assuming a growth in efficiency of existing floorspace.
2015 PRICES

TABLE 2: COMPARISON GOODS CAPACITY, 2016-2031

Stroud (excluding commitment)

	2016	2021	2026	2031
Available comparison goods expenditure	£603.0	£665.5	£795.1	£946.9
Turnover from study area	£100.5	£110.7	£132.0	£156.8
Market share	16.7%	16.6%	16.6%	16.6%
Expenditure inflow	£6.0	£6.6	£7.9	£9.4
Total turnover potential	£106.5	£117.3	£139.9	£166.2
Benchmark turnover of existing and committed facilities	£106.5	£116.9	£130.6	£145.6
Commitment	£0.0	£0.0	£0.0	£0.0
Residual expenditure	**£0.0**	**£0.4**	**£9.3**	**£20.6**
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,275	£5,789	£6,467	£7,211
Indicative retail floorspace capacity (sq m net)	**0**	**73**	**1435**	**2862**

Notes:

Total expenditure taken from Table 5f.
Turnover from study area taken from Tables 9a-9d.
Market share is the turnover from study area expressed as a percentage of total available expenditure.
Expenditure inflow based on assumptions made in 2010 and 2013 Retail Study.
Total turnover potential is the study area derived turnover plus expenditure inflow.
Benchmark turnover at 2016 assumed to match total turnover potential, projected forward assuming a growth in efficiency of existing floorspace.
2015 PRICES

TABLE 3: COMPARISON GOODS CAPACITY, 2016-2031

Stroud (excluding commitment) (lower market share)

	2016	2021	2026	2031
Available comparison goods expenditure	£603.0	£665.5	£795.1	£946.9
Turnover from study area	£100.5	£99.8	£119.3	£142.0
Market share	16.7%	15.0%	15.0%	15.0%
Expenditure inflow	£6.0	£6.0	£7.2	£8.5
Total turnover potential	£106.5	£105.8	£126.4	£150.5
Benchmark turnover of existing and committed facilities	£106.5	£116.9	£130.6	£145.6
Commitment	£0.0	£0.0	£0.0	£0.0
Residual expenditure	**£0.0**	**-£11.1**	**-£4.2**	**£4.9**
Indicative sales density for new comparison goods floorspace (£/sq m)	£5,275	£5,789	£6,467	£7,211
Indicative retail floorspace capacity (sq m net)	**0**	**-1915**	**-646**	**685**

Notes:

Total expenditure taken from Table 5f.
Turnover from study area taken from Tables 9a-9d.
Market share is the turnover from study area expressed as a percentage of total available expenditure.
Expenditure inflow based on assumptions made in 2010 and 2013 Retail Study.
Total turnover potential is the study area derived turnover plus expenditure inflow.
Benchmark turnover at 2016 assumed to match total turnover potential, projected forward assuming a growth in efficiency of existing floorspace.
2015 PRICES