


Stroud District Market Towns Study

Dursley:

Results and Analysis of Pedestrian Flow Counts and Land Use and Vacancy Assessment 2004

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1. Introduction

- 1.1 Atkins was commissioned by Stroud District Council in October 2004 to undertake annual pedestrian flow counts and land use and vacancy assessments within the six market towns of Berkeley, Dursley, Nailsworth, Stonehouse, Stroud and Wotton-under-Edge. This report provides the results and analysis of surveys undertaken within the central area of Dursley.
- 1.2 The assessments provide an update to surveys and analysis carried out by Atkins in 2003 as part of the Stroud District Market Towns Study, commissioned by Stroud District Council in October 2003.

PEDESTRIAN FLOW COUNTS

- 1.3 The pedestrian flow count survey methodology employs identical procedures undertaken during Atkins' 2003 pedestrian counts in the six town centres, which in turn was informed by previous counts undertaken in Stroud, Dursley, Stonehouse and Nailsworth. The counts were undertaken at the same points, at the same time of year as counts undertaken since 1997 in Stroud and Dursley, and since 2002 in Stonehouse and Nailsworth. Additional counts were undertaken to encompass Wotton-under-Edge and Berkeley in 2003, which were replicated as part of this year's programme.
- 1.4 Sections two and four of this document present the following pedestrian flow count analysis for Dursley:
- ◆ Total flows at each counting point;
 - ◆ Aggregated daily flows and comparisons with historic data;
 - ◆ Average flows per minute and comparisons with historic data;
 - ◆ Ranking of sites, compared with previous years' data;
 - ◆ Daily flows compared to previous historic data;
 - ◆ Market day analysis and comparison with historic data;
 - ◆ Comparison with other Stroud District Market towns.

LAND USE AND VACANCY ASSESSMENT

- 1.5 The land use and vacancy audit methodology uses the same procedures as the 2003 assessment, which was based upon the format of a Vacant Premises Audit of Stroud town centre carried out by the District Council in July 2002. The original methodology was extended to include a walkover site appraisal of the six town centres, enabling "snapshot" mapping of the overall land uses, including vacancy, in each town centre at both the ground and the first floors.
- 1.6 Section three of this document presents the raw data from this year's audit and provides comparisons with the data from the 2003 audit. General observations are included where they are considered worthy of note, including any trends consistent with the pedestrian flow counts.

Disclaimer

- 1.7 The details provided in the audit provide the best available information at the time of compilation and thus represent a “snapshot” of the situation at the time of audit. Their permanent accuracy cannot therefore be guaranteed by any particular agent involved in informing and compiling this audit. No legal responsibility can be accepted with regard to errors, omissions, or misinterpretation.

2. Pedestrian Flow Count Analysis

METHODOLOGY

- 2.1 Pedestrian flow counts were undertaken in accordance with details provided by the District Council, as set out in Table 2.1.

Table 2.1 – Number of Counting points, Count Duration and Date of Counts 2004

Town	No. of Counting Points	Length of Count (minutes)	Date of Counts
Berkeley	6	7	Friday 15 th October Saturday 16 th October* Tuesday 19 th October Saturday 23 rd October
Dursley	6	7	Friday 15 th October Saturday 16 th October Tuesday 19 th October Saturday 23 rd October*
Nailsworth	7	5	Friday 15 th October Saturday 16 th October Tuesday 19 th October Saturday 23 rd October*
Stonehouse	3	12	Friday 15 th October Saturday 16 th October Tuesday 19 th October
Stroud	16	5	Friday 15 th October Saturday 16 th October* Tuesday 19 th October Saturday 23 rd October
Wotton-under-Edge	6	7	Friday 15 th October Saturday 16 th October Tuesday 19 th October Saturday 6 th November*

* Indicates market day count

- 2.2 As indicated in Table 2.1, counts were undertaken in each of the centres on Friday 15th October, Saturday 16th October and Tuesday 19th October. Additional counts were undertaken on Saturday 23rd October in Stroud, Berkeley, Dursley and Nailsworth in order to ensure that data included a comparison of non-market and market situations in each of the towns. An additional count was also undertaken in Wotton-under-Edge on Saturday 6th November to take account of the market held on that day.
- 2.3 Counts were undertaken continuously between 9.30am and 5.30pm with counting points being rotated at the same time in each hour. Counts were recorded using hand-held counters and transferred to record sheets (**Appendix A**). All pedestrians

passing the specified location in either direction were counted, across the full width of the street or shopping mall, with the exception of 'babes in arms' and toddlers in prams or pushchairs.

- 2.4 In order to identify possible factors affecting the counts, enumerators were requested to make a note of the prevailing weather conditions in each hour, together with any 'unusual' events or circumstances that may affect footfall – for example: roadworks; sporting events; and markets. Any comments made during the survey are included as footnotes to the relevant table.

COUNTING POINTS

- 2.5 The six counting point locations used for Dursley are illustrated in **Figure 2.1** and are as follows:

- ◆ **Point 1** – Cobbler's, Parsonage Street;
- ◆ **Point 2** - Job Centre, off Parsonage Street;
- ◆ **Point 3** - Kings Head, Parsonage Street;
- ◆ **Point 4** - Bell Hotel, Long Street;
- ◆ **Point 5** - The Vac Shop, Silver Street;
- ◆ **Point 6** - Lions Club, May Lane.

FLOW COUNT RESULTS

- 2.6 Full details of the 7 minute pedestrian counts at each location are illustrated in Tables 2.2 to 2.4 for each of the three non-market days and in Table 2.5 for the market day.

Table 2.2 – Dursley Pedestrian Count Results: Friday 15th October 2004

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
weather	Dry	Dry	Dry	Dry	Rain	Rain	Rain	Rain
Point 1 - Cobblers, Parsonage Street	36	59	58	49	42	63	65	34
Point 2 - Job Centre, off Parsonage Street	80	107	109	42	58	79	68	50
Point 3 - Kings Head, Parsonage Street	50	54	48	34	35	44	31	25
Point 4 - Bell Hotel, Long Street	27	18	21	32	24	14	19	11
Point 5 -The Vac Shop, Silver Street	31	35	37	24	22	39	38	24
Point 6 - Lions Club, May Lane	46	31	21	18	20	29	32	23

Table 2.3 – Dursley Pedestrian Count Results: Saturday 16th October 2004

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
weather	Dry	Dry	Dry	Rain	Drizzle	Dry	Drizzle	Drizzle
Point 1 - Cobblers, Parsonage Street	48	63	65	21	18	38	30	26
Point 2 - Job Centre, off Parsonage Street	48	41	90	15	21	21	20	21
Point 3 - Kings Head, Parsonage Street	56	65	101	60	38	46	48	31
Point 4 - Bell Hotel, Long Street	12	11	22	16	4	15	9	4
Point 5 - The Vac Shop, Silver Street	15	32	39	31	17	23	15	12
Point 6 - Lions Club, May Lane	22	39	29	13	9	4	16	4

Table 2.4 – Dursley Pedestrian Count Results: Tuesday 19th October 2004

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
weather	Rain	Rain	Rain	Rain	Dry	Dry	Dry	Dry
Point 1 - Cobblers, Parsonage Street	37	50	51	33	34	45	56	24
Point 2 - Job Centre, off Parsonage Street	35	43	35	39	28	42	49	29
Point 3 - Kings Head, Parsonage Street	67	55	70	54	45	68	57	48
Point 4 - Bell Hotel, Long Street	21	26	16	35	18	20	18	22
Point 5 - The Vac Shop, Silver Street	53	26	29	21	18	57 ¹	32	30
Point 6 - Lions Club, May Lane	22	11	16	6	27	13	17	20

¹ Figure is affected by large number of School Children passing point at this time

Table 2.5 – Dursley – Pedestrian Flow Count Results: Saturday 23rd October 2004 (Market Day)

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
weather	Drizzle	Rain	Rain	Rain	Rain	Rain	Rain	Rain
Point 1 - Cobblers, Parsonage Street	51	63	50	33	23	33	35	12
Point 2 - Job Centre, off Parsonage Street	27	39	42	36	15	17	19	11
Point 3 - Kings Head, Parsonage Street	46	78	83	50	26	40	31	13
Point 4 - Bell Hotel, Long Street	7	16	10	13	18	4	3	4
Point 5 - The Vac Shop, Silver Street	17	23	25	20	17	14	17	7
Point 6 - Lions Club, May Lane	46	40	35	8	7	4	13	6

2.7 One comment was noted on the Tuesday count – the high number of children passing Point 5 after school (Table 2.4). With the exception of poor weather, which was recorded on each survey day, no other factors were reported by enumerators which may have affected results.

AVERAGE DAILY COMPARISONS WITH PREVIOUS YEARS, 2002 TO 2004

- 2.8 In order to provide a comparison with counts from years prior to 2004, the figures have been grossed up to hourly equivalents to provide an estimate of total pedestrian flows both per hour as well as a total for each day.
- 2.9 Table 2.6 provides a comparison of pedestrian flows in Nailsworth in 2001, 2002, 2003 and 2004, aggregated at each site for the three days. It illustrates a pattern of decline in terms of footfall in Dursley each year since 2001. Total numbers have fallen by 13,935 (24.3%) between 2001 and 2004 and are down 6.1% on the previous year's count. There has been a considerable local decline on the central shopping street (Parsonage Street) where Points 1 and 3 have dropped by 26.7% and 22.7% respectively on 2003 results. There has, however, been an increase at Point 5 on Silver Street by an average of 43.1% on the previous year (although the 2004 figure remains lower than that recorded in the 2001 and 2002 results). There has also been an average increase of 22.0% at Point 2 (off Parsonage Street) when comparing 2004 statistics with the 2003 results.

Table 2.6 - Total Pedestrian Flows: Dursley 2001 to 2004

	2001	2002	2003	2004	%change 2001v2004	%change 2002v2004	%change 2003v2004
Point 1 - Cobblers, Parsonage Street	13362	8407	12212	8956	-33.0	6.5	-26.7
Point 2 - Job Centre, off Parsonage Street	15160	8116	8219	10027	-33.9	23.5	22.0
Point 3 - Kings Head, Parsonage Street	14243	8476	13635	10541	-26.0	24.4	-22.7
Point 4 - Bell Hotel, Long Street	3231	5733	3634	3728	15.4	-35.0	2.6
Point 5 - The Vac Shop, Silver Street	6093	6496	4191	5999	-1.5	-7.7	43.1
Point 6 - Lions Club, May Lane	5279	9299	4345	4128	-21.8	-55.6	-5.0
TOTAL	57368	46527	46235	43433	-24.3	-6.6	-6.1

AVERAGE FLOWS PER MINUTE

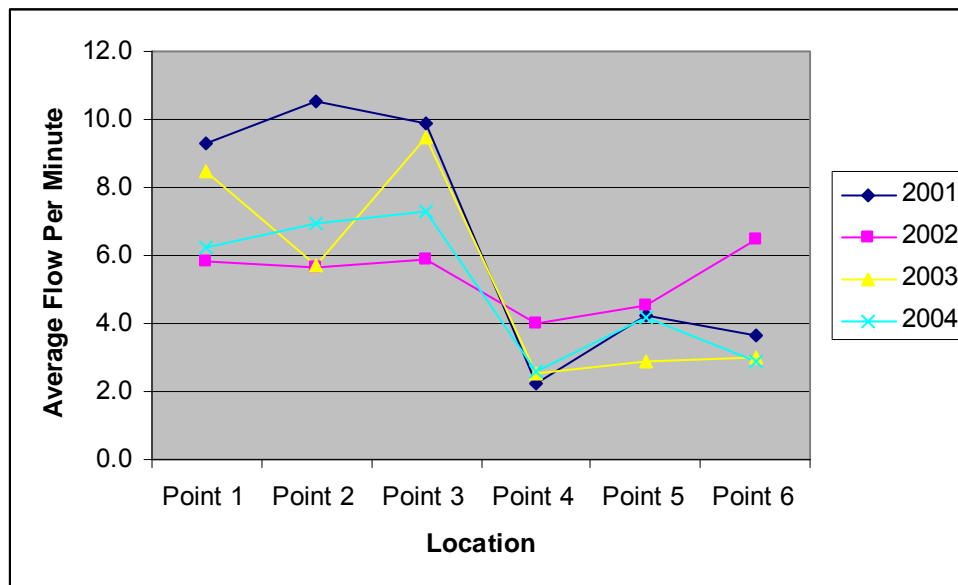
- 2.10 A daily average flow per minute at each counting point has also been derived for the 2001 to 2004 statistics.
- 2.11 Average flows per minute for each site have been determined by averaging total counts for each site over the three days and then dividing the total by the length of the counts. For example, if the total daily flow at a particular site was 50 on Tuesday, 60 on Friday and 70 on Saturday and each count lasted 5 minutes then the flow per minute would be worked out as follows:

$50 + 60 + 70 = 180$ (total flow for the site over the three days)
$180 \text{ divided by } 3 \text{ (as in 3 days – the number of survey days)} = 60$ (average daily flow for the site)
$60 \text{ divided by } 8 \text{ (as in 8 hours – the length of the survey)} = 7.5$ (hourly flow)
$7.5 \text{ (hourly flow) divided by } 60 = 0.1$ people per minute

- 2.12 Based on the above formula, the average flows per minute at each point in Dursley in 2004 are as follows:
- ◆ Point 1 – Cobbler's, Parsonage Street 6.2
 - ◆ Point 2 - Job Centre, off Parsonage Street 7.0
 - ◆ Point 3 - Kings Head, Parsonage Street 7.3
 - ◆ Point 4 - Bell Hotel, Long Street 2.6
 - ◆ Point 5 - The Vac Shop, Silver Street 4.2
 - ◆ Point 6 - Lions Club, May Lane 2.9

2.13 Comparisons with previous years are shown in Figure 2.2 below:

Figure 2.2 - Average Flows Per Minute in Dursley 2002-2004



2.14 Average flows per minute are down on 2001 and 2003 at Points 1 and 3. There has been an improvement on the previous year (2003) at Points 2 and 4, although this is still less than the average flows per minute extracted from the 2002 results for points 4-6.

SITE RANKING

2.15 Table 2.7 details relative changes in rankings between 2003 and 2004. The 'rank' shows the relative level of pedestrian flows at the site compared to others in the town – the site ranked '1' is therefore the busiest.

Table 2.7 - Relative Change in Ranking: Dursley

	2003 Rank	2004 Rank	Movement
Point 1 - Cobblers, Parsonage Street	2	3	Down
Point 2 - Job Centre, off Parsonage Street	3	2	Up
Point 3 - Kings Head, Parsonage Street	1	1	Same
Point 4 - Bell Hotel, Long Street	6	6	Same
Point 5 - The Vac Shop, Silver Street	5	4	Up
Point 6 - Lions Club, May Lane	4	5	Down

2.16 As Table 2.7 illustrates, the busiest counting point has remained at Point 3 on Parsonage Street, Points 2 and 3 remain high in the ranking and Point 4 remains the location with least pedestrian activity. Point 5 on Silver Street has moved up a rank replacing Point 4 as the fourth busiest counting point location.

DAILY FLOWS

2.17 Table 2.8 shows daily flows at each of the counting points and relative ranking on each of the three non-market survey days in Dursley and Table 2.9 shows total daily flow comparisons with 2002 and 2003.

Table 2.8 – Daily Flows: Dursley 2004

	Friday 15.10.04		Saturday 16.10.04		Tuesday 19.10.04	
	Total	Rank	Total	Rank	Total	Rank
Point 1 - Cobblers, Parsonage Street	3479	2	2648	2	2828	2
Point 2 - Job Centre, off Parsonage Street	5082	1	2374	3	2571	3
Point 3 - Kings Head, Parsonage Street	2751	3	3814	1	3976	1
Point 4 - Bell Hotel, Long Street	1423	6	797	6	1508	5
Point 5 - The Vac Shop, Silver Street	2143	4	1577	4	2280	4
Point 6 - Lions Club, May Lane	1885	5	1166	5	1131	6
TOTAL FLOWS	16763		12375		14295	

Table 2.9 – Total Daily Flow Comparisons: Dursley 2002-2004.

	2002	2003	2004	%Change 2004v2002	%Change 2004v2003
Tuesday	8716	13875	14295	64.0	3.0
Friday	13249	15622	16763	26.5	7.3
Saturday	21562	16737	12375	-42.6	-26.1

2.18 Despite overall flow being lower in 2004 than in previous years, there has been an improvement on the previous two years in terms of daily flow comparisons on weekdays, most notably a considerable increase (64%) is evident on the most recent Tuesday count when compared to 2002 statistics. The results also record a 26.5% increase in Friday flows when comparing 2002 to 2004. However, these increases are offset against considerable falls in flow recorded on the Saturday counts, with a 42.6% decrease on 2002 and 26.1% decrease on 2003, leading to a net reduction in flow overall.

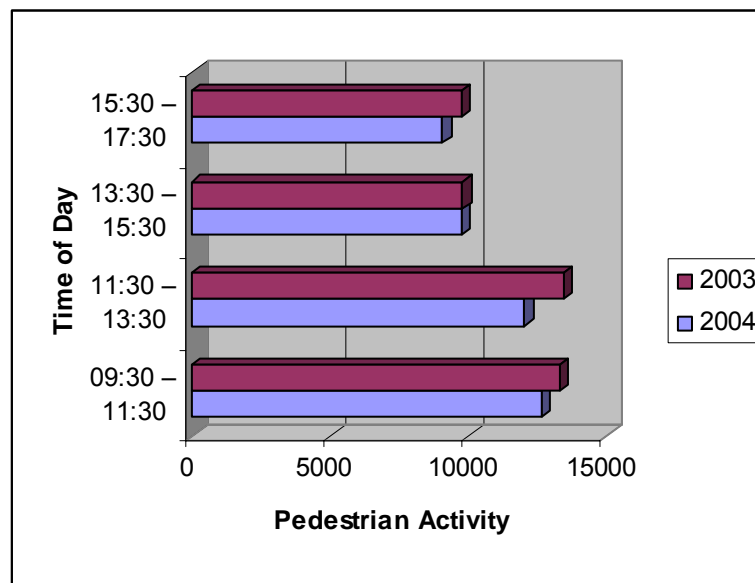
TIME OF DAY ANALYSIS

2.19 Table 2.10 shows the time of day variations in percentage share of flow for Dursley and Fig 2.3 provides a time of day comparison with 2003.

Table 2.10 - Time of Day: Dursley by Site 2004

Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
Point 1 - Cobblers, Parsonage Street	2511	28.0	2374	26.5	2057	23.0	2014	22.5
Point 2 - Job Centre, off Parsonage Street	3034	30.3	2828	28.2	2134	21.3	2031	20.3
Point 3 - Kings Head, Parsonage Street	2974	28.2	3145	29.8	2365	22.4	2057	19.5
Point 4 - Bell Hotel, Long Street	986	26.4	1217	32.6	814	21.8	711	19.1
Point 5 - The Vac Shop, Silver Street	1645	27.4	1551	25.9	1508	25.1	1294	21.6
Point 6 - Lions Club, May Lane	1465	35.0	883	21.1	874	20.9	960	23.0
Total	12615	29.0	11998	27.6	9753	22.5	9067	20.9

Figure 2.3 – Time of Day: Dursley 2004/2003 Comparison



2.20 In 2004, the busiest time of day on average in Dursley was between 09.30 and 11.30, which differs from 2003 when the busiest time was recorded as being 11.30 to

13.30. There has been an apparent decrease in footfall in the afternoon periods compared to 2003, although in the 13:30-15:30 the difference is minimal.

MARKET DAY ANALYSIS

2.21 Table 2.11 provides a comparative analysis between pedestrian count results on Saturday 23rd October, when the Farmers Market was held in Dursley, and the “non-market” Saturday count undertaken on the 16th October 2004

Table 2.11 - Market Day Analysis and Comparison: Dursley

Site	23.10.04 Market Day		16.10.04 Non Market		% Change	25.10.03 Market Day		% Change	26.10.02 Market Day		% Change
	Total	Rank	Total	Rank		Total	Rank		Total	Rank	
1	2571	2	2648	2	-2.9	5039	1	-49.0	5271	3	-51.2
2	1765	3	2374	3	-25.7	3214	3	-45.1	5502	2	-67.9
3	3145	1	3814	1	-17.5	4988	2	-36.9	6076	1	-48.2
4	643	6	797	6	-19.3	754	6	-14.7	4142	6	-84.5
5	1200	5	1577	4	-23.9	1594	4	-24.7	4849	4	-75.3
6	1363	4	1166	5	16.9	1243	5	9.7	4761	5	-71.4
Total	10687		12376		-13.6	16832		-36.5	30601		-65.1

2.22 As with last year there appears to be a lower pedestrian flow on the market Saturday than the non-market Saturday in 2004 - all locations, with the exception of Point 6, have shown a fall in comparison to the non market Saturday. However, this may be at least partly attributed to particularly poor weather conditions noted on the market Saturday.

2.23 There continues to be a significant decrease in footfall at all locations between the market days in 2002 and 2003. The 2004 market day count illustrates an average 65.1% percentage flow decrease on the equivalent 2002 results. It was, however, indicated to the enumerator by market traders that the market was smaller than normal, with less stalls compared to previous months.

Table 2.12 – Market Day Analysis by Time of Day: Dursley

Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
1	1396	27.7	1688	33.5	1106	21.9	949	16.8
2	942	29.3	728	22.7	931	25.9	711	22.1
3	1603	32.1	1748	35.0	908	18.2	728	14.6
4	249	33.0	206	27.2	189	25.0	111	14.8
5	540	33.9	429	26.9	471	29.6	154	9.7
6	557	44.8	317	25.5	223	17.9	146	11.7
TOT	5288	31.4	5116	30.4	3728	22.1	2700	16.0

2.24 Table 2.12 indicates that time of day patterns are relatively consistent when comparing the market day with non-market days in Dursley in 2004 (Table 2.10). Both tables illustrate similar proportions of pedestrian activity throughout the day, with around 30% of activity in the mornings between 09:30 and 11:30 on both market and non-market days, and less than 21% of footfall in the late afternoons between 15:30 and 17:30.

3. Land Use and Vacant Premises Audit and Analysis

THE AUDIT PROCESS

- 3.1 The geographical extent of the audit was confined to the town centre of Dursley, as defined in the Stroud District Local Plan. This is the same geographical coverage as the audit undertaken in 2003.
- 3.2 The process comprised two main elements:
- ◆ walkover surveys; and
 - ◆ desk-based research.

WALKOVER SURVEYS

- 3.3 Walkover surveys of the full extent of each of the six town centres were undertaken on Tuesday 12th October 2004. Mapping compiled during the 2003 audit was used as the base information and notes were made with regards to any changes in uses on the ground and first floors that had occurred since the previous audit.
- 3.4 As with the previous year (2003), all buildings were classified into land use categories, which represent a general classification of the various uses common to town centres, for the purposes of use mapping and identification of vacant units. This year an additional category was added entitled “food and entertainment”, which includes all vendors of hot and cold takeaway food, pubs, bars, cafés, restaurants and night clubs. This reflects changes to the Use Classes Order in 2004, which sought to distinguish such uses from other retail classes. The seven categories are therefore as follows:
- ◆ **convenience:** encompassing supermarkets; grocers; butchers and bakers;
 - ◆ **comparison:** including non-food retail such as clothes; gifts; electrical goods;
 - ◆ **food and entertainment:** Including takeaways, restaurants, cafés, bars and nightclubs;
 - ◆ **residential:** dwelling houses including flats over shops;
 - ◆ **offices:** general office uses including solicitors; financial advisors; estate agents; travel agents;
 - ◆ **service:** including schools; community centres; places of worship; banks; hairdressers; beauticians; alternative therapy centres; and
 - ◆ **vacant:** empty, disused or derelict units.
- 3.5 The survey results are presented in the form of two colour coded maps, separated into ground floor and first floor uses. These maps comprise **Figures 3.1 and 3.2** of this report, respectively.

- 3.6 The classes have been selected to provide a simplified and clearly spatial profile of general uses. The spatial representation is tailored to the consultant's understanding of local needs and is therefore unique to the method presented in this report.

DESK-BASED RESEARCH

- 3.7 As with last year's analysis, the site appraisal work provided by the walkover survey process is supplemented by information provided by commercial property agents and a web based search of the Gloucestershire First website, relating to each of the six market towns. The following sources were used for this exercise and we would extend our gratitude to those traders and businesses that have been of assistance:

- ◆ www.glosfirst.co.uk;
- ◆ Alder King Property Consultants;
- ◆ Andrew Watton Chartered Surveyors;
- ◆ BK The Property Assets Consultancy;
- ◆ Downing Bentley Chartered Surveyors;

- 3.8 Responding agencies reported that there is currently a high demand for office and shop space in some of the smaller Stroud District Market towns (notably Nailsworth and Wotton-under-Edge). However, this was not reported to be the case in Dursley, which is not attracting the same levels of interest for either retail or office space. This is believed to be attributable to a general perception that Dursley is a less successful centre than other local towns, which is considered to have deterred businesses from moving into the vacant properties.

VACANCY IN DURSLEY

- 3.9 In line with the 2003 methodology, vacant property is sub-divided into the following types to ease analysis and provide a basis for comparison with historic data:
- ◆ retail;
 - ◆ business; and
 - ◆ residential and other.
- 3.10 Table 3.1 presents the vacancy analysis for Dursley. The addresses are based on the best available mapping provided by Stroud District Council, with a tick denoting a vacant unit at the ground and/or first floor and an asterisk highlighting a change since the previous year. The table uses a simple three category colour coding system to present the most likely previous use of the unit and a key is provided at the base of the table.

Table 3.1 – 2003 and 2004 Vacancy Analysis: Dursley

Address	2003		2004	
	Ground Floor	First Floor	Ground Floor	First Floor
Building to rear of Boulton Lane	√	√	√	√
Adjacent to Bank, Castle Street	√	√	√	√
Buildings to rear of delivery office, Castle Street	√(3)	√(3)	√(3)	√(3)
Buildings to rear of church, Castle Street	√(3)	√(3)	√(3)	√(3)
11 Long Street		√		√
13 Long Street	√	√	*	√
24 Long Street	√		*	
26 Long Street	√		*	
16 Market Place	√	√	√	√
11 May Lane	√	√	√	√
11a May Lane	√	N/A	√	N/A
25 Parsonage Street			√*	
35d/c Parsonage Street		√(2)		**
39 Parsonage Street				√*
Rear of 53 Parsonage Street	√	√	√	√
62 Parsonage Street		√		√
64-66 Parsonage Street	√		*	
22 Silver Street			√*	
21-23 Silver Street		√		√
24 Silver Street	√		*	
26 Silver Street	√		√	√*
28 Silver Street	√	√	√	
31 Silver Street	√		√	
32 Silver Street			√*	
34 Silver Street			√*	
36 Silver Street			√*	

Numbers in brackets indicate multiple units at one address: * indicates where a change in unit status since 2003.




KEY:		Retail
		Business
		Residential/Other

Table 3.2 – Total Vacancy by Type: Dursley

Type	2003		2004		% Change 2004v2003
	No. of Units	%	No. of Units	%	
Retail	6	16	9	24	50
Business	15	39	11	30	-27
Residential/Other	17	45	17	46	0
TOTAL	38	100	37	100	-3

3.11 There have been several changes in vacancy in comparison to 2003, although the overall number of vacant units has decreased by one. Whilst business vacancy has declined by 27% to 11 units, there are now 50% more vacant retail units. There are now 9 vacant retail units in the study area, six of which are on Silver Street, three more than the previous year indicating a high concentration of retail vacancy in this area of the town. Two retail units appear to have been let over the past year, one on Parsonage Street and the other on Silver Street.

3.12 The number of vacant residential/other units has remained constant at 17, now comprising 46% of total vacant units.

LAND USE IN DURLSEY

3.13 The results of the land use assessment are illustrated in **Figures 3.1 and 3.2** and in Table 3.3 below. As a new sector has been added to the land use assessment, a comparison with the previous year is not undertaken in this assessment.

Table 3.3 – Land Uses: Dursley

	Ground Floor (GF)	% of GF units	Upper Floor (UF)	% of UF units	Total units	% of Total Units
Convenience	6	4	1	1	7	3
Comparison	29	21	6	5	35	13
Food and entertainment	7	5	5	4	12	5
Residential	19	14	53	43	72	27
Offices	10	7	20	16	30	11
Service	44	31	25	20	69	26
Vacant	20	14	17	14	37	14
TOTAL	135	100	127	100	262	100

- 3.14 Dursley has a mixed character, with part of the historic core and market place surviving change to the east, juxtaposed with the more recently constructed pedestrianised run of purpose built retail units to the west. There are significant residential and service functions in the core of the town (representing 27% and 26% total units respectively), complemented by a sizeable comparison shopping element comprising 35 units in total (13% of all units), although there are very few 'high street names' represented within this. Convenience shopping represents only 3% of the total number of units identified, however there are seven units in total including a mid-sized Somerfield store and a good range of independent food outlets. Food and Entertainment uses are also in short supply in the town centre, representing just 5% of the total including three pubs/bars and a nightclub.

4. Findings

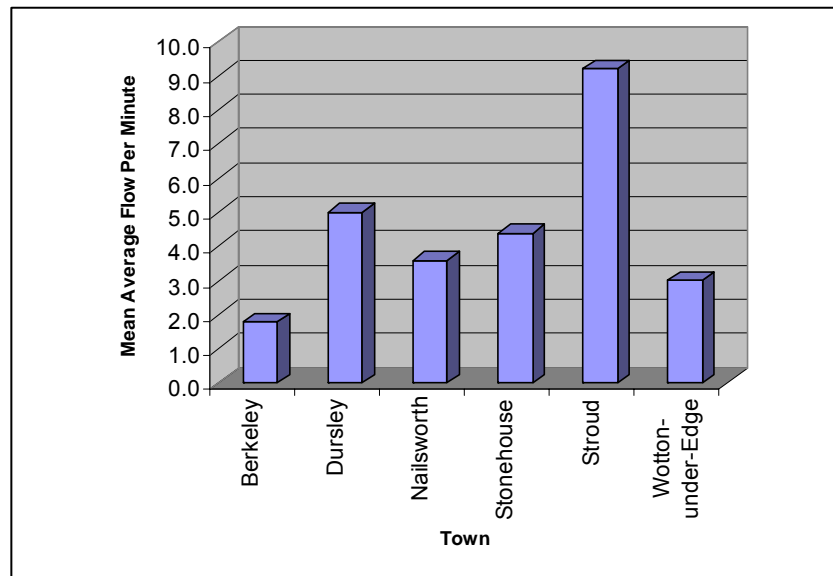
PEDESTRIAN FOOTFALL

- 4.1 There has been an overall decline in terms of pedestrian footfall in Dursley each year since 2001. Pedestrian activity has declined by an average of 24.3% since 2001 and is down 6.1% on the previous year's count. The busiest counting point continues to be outside the Kings Head pub on Parsonage Street, whilst the least busy counting point is still Long Street. Silver Street has seen an increase in pedestrian activity despite an increase in vacancy.
- 4.2 Both Tuesday and Friday have seen increases in pedestrian activity in comparison to the 2002 and 2003 results. The Tuesday results suggest that there has been a 64% rise in pedestrian activity in comparison to 2002. These increase have, however, been outweighed by significant decreases on the Saturday results, which are down 42.6% on the 2002 statistics.
- 4.3 Dursley remains busier in the mornings than the afternoons, with an average of 56.6% of activity occurring between 09:30 and 12:30. This proportion is similar on the market day when 61.8% of activity was concentrated in the morning.
- 4.4 The market day analysis shows a 13.6% decrease in activity in comparison with the non-market Saturday and significant decreases on the equivalent market day counts in 2002 and 2003. Pedestrian activity is down by 65.1% on the market day in 2002 and 36.5% on the last year's market day count.

Comparison With Other Towns

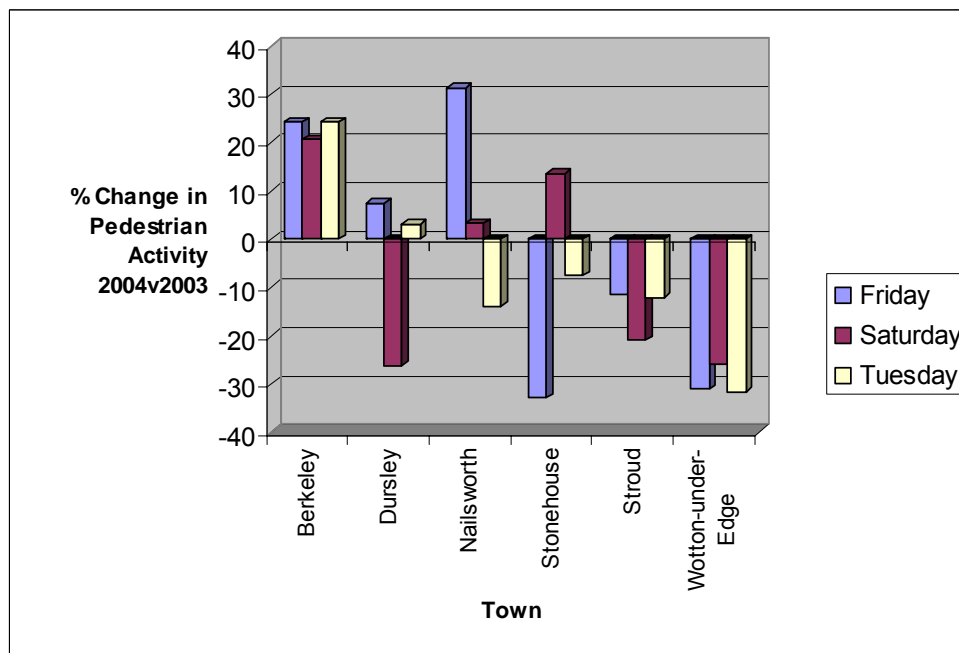
- 4.5 In order to provide a comparison between the towns, mean average flow per minute has been calculated for all towns, as illustrated in Figure 4.1
- 4.6 As Figure 4.1 shows, Dursley has the highest mean average flows per minute when compared to the other study area towns, with the exception of Stroud – the mean average flow per minute in Dursley is just under 5 pedestrian movements across its six counting points. Stonehouse and Nailsworth have the third and fourth highest flows per minute, respectively, when comparing the six towns.

Figure 4.1 – Mean Average Flow Per Minute in the Six Study Towns



4.7 Figure 4.2 provides a comparison between each of the six towns in terms of percentage change in pedestrian activity from 2003 to 2004, over the three survey days. The chart indicates that Dursley has seen lesser decreases in pedestrian activity than Stonehouse and Wotton-under-Edge and that only Saturday saw any actual decrease in average pedestrian activity. All towns except Berkeley have seen some decline on at least one of the survey days, although only Stroud and Wotton-under Edge saw decreases on the previous year on all days.

Figure 4.2 – Comparison of Change in Pedestrian Activity across the Six Study Towns between 2003 and 2004



VACANCY AND LAND-USE

4.8 Conversations with commercial property agents have indicated that Dursley has not seen the high demand for office and retail spaces that is reported to have occurred in other towns in the vicinity. The town is perceived as being less successful than its other counterparts, which has reputedly been influential on the property market.



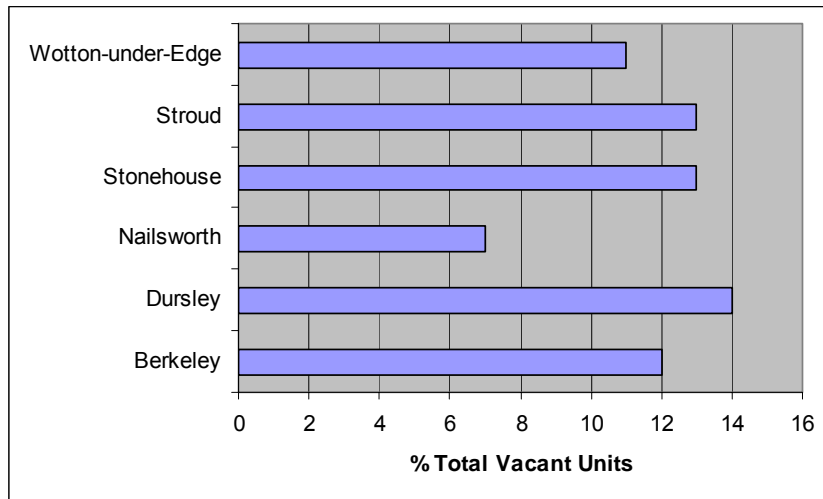
Silver Street – High Proportion of Vacant Retail Units

4.9 There has been a slight decrease in the overall number of vacant units in the study area, although there has been a significant rise in the number of vacant retail units on the previous year. This is particularly acute on Silver Street, where six of the nine vacant retail units are located.

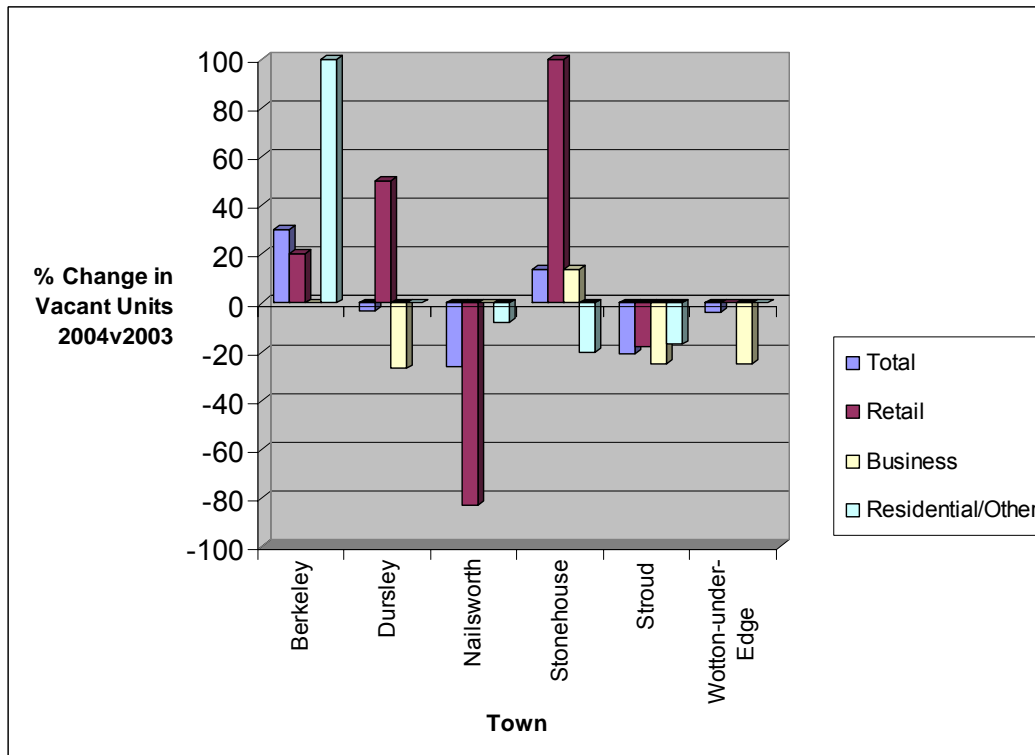
Comparison With Other Towns

4.10 As Figure 4.3 indicates, 14% of all units within the Dursley town centre study area are vacant, which is a larger proportion than any of the other five towns.

Figure 4.3 – Comparison of % Vacant Units Within Study Towns



4.11 Figure 4.4 shows percentage change in vacancy across all sectors in each of the towns over the past year.

Figure 4.4 - Percentage Change in Vacant Units Across All Towns 2003-2004

- 4.12 As Figure 4.4 indicates, Dursley has seen improvement in the business sector since 2003, although there has been a significant increase in retail vacancy. Overall total vacancy is down in comparison to the previous year. Only Berkeley and Stonehouse have seen net increases over the past year in terms of total vacant units.