


Stroud District Market Towns Study

Nailsworth:

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 Nailsworth.
- 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 Nailsworth:
- ◆ 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.

COUNTING POINTS

- 2.5 The seven counting point locations used for Nailsworth are illustrated in **Figure.2.1** and are as follows:

- ◆ **Point 1** – Baileys Opticians, Old Market;
- ◆ **Point 2** – Cotswolds Kitchens, Market Street;
- ◆ **Point 3** – Car Park entrance, Butchers Hill;
- ◆ **Point 4** – RSPCA, Market Street;
- ◆ **Point 5** – Edward Walker, Fountain Street;
- ◆ **Point 6** – Leonard Walker, George Street;
- ◆ **Point 7** – Junction of Springhill and Old Market.

FLOW COUNT SUMMARIES

- 2.6 Full details of the 5 minute pedestrian counts at each location are illustrated in Tables 2.2 to 2.4 for each of the three non-market days and Table 2.5 for the market day. Although poor weather was noted on each day, particularly on the non-market Saturday, enumerators reported no other problems or factors that may have affected the results.

Table 2.2 - Nailsworth 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	Dry	Heavy Rain	Heavy Rain	Heavy Rain
Point 1 - Baileys Opticians, Old Market	38	38	30	23	25	27	37	37
Point 2 - Cotswolds Kitchens, Market Street	3	6	5	4	6	3	10	4
Point 3 - CP entrance	11	6	12	17	22	11	13	10
Point 4 - RSPCA, Market Street	17	35	26	24	26	20	31	16
Point 5 - Edward Walker, Fountain Street	21	7	10	23	11	16	14	12
Point 6 - Leonard Walker, George Street	23	28	25	24	26	31	19	18
Point 7 - Springhill, Old Market	11	14	10	11	15	16	18	21

Table 2.3 – Nailsworth 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	Drizzle	Dry	Rain	Rain	Drizzle	Dry
Point 1 - Baileys Opticians, Old Market	43	61	36	31	26	28	25	75
Point 2 - Cotswolds Kitchens, Market Street	20	8	8	3	1	8	0	14
Point 3 - CP entrance	9	13	15	5	12	15	12	10
Point 4 - RSPCA, Market Street	17	17	26	14	10	16	21	7
Point 5 - Edward Walker, Fountain Street	19	19	22	20	22	16	11	16
Point 6 - Leonard Walker, George Street	17	40	40	30	29	32	28	19
Point 7 - Springhill, Old Market	34	15	18	14	17	21	5	10

Table 2.4 – Nailsworth 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	Rain	Drizzle	Sunny	Sunny
Point 1 - Baileys Opticians, Old Market	30	28	21	19	23	28	26	19
Point 2 - Cotswolds Kitchens, Market Street	14	10	7	5	6	5	7	5
Point 3 - CP entrance	8	9	6	12	11	12	10	8
Point 4 - RSPCA, Market Street	16	21	12	14	16	11	15	12
Point 5 - Edward Walker, Fountain Street	19	13	13	17	14	14	14	10
Point 6 - Leonard Walker, George Street	24	32	23	25	22	22	19	20
Point 7 - Springhill, Old Market	15	19	12	16	19	17	17	18

Table 2.5 - Nailsworth Pedestrian 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	Damp	Drizzle	Rain	Rain	Rain	Rain	Rain	Rain
Point 1 - Baileys Opticians, Old Market	48	41	36	26	18	25	15	17
Point 2 - Cotswolds Kitchens, Market Street	1	18	16	1	4	3	4	4
Point 3 - CP entrance	10	16	6	9	22	12	4	12
Point 4 - RSPCA, Market Street	18	13	11	14	11	15	11	10
Point 5 - Edward Walker, Fountain Street	36	19	37	15	26	14	7	6
Point 6 - Leonard Walker, George Street	25	40	32	21	21	31	25	19
Point 7 - Springhill, Old Market	15	18	10	11	19	19	20	11

AVERAGE DAILY COMPARISONS WITH PREVIOUS YEARS, 2002 TO 2004

2.7 In order to enable a comparison with counts from 2002 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. Table 2.6 provides a comparison of pedestrian flows in Nailsworth in 2002, 2003 and 2004 aggregated for the three days at each site.

Table 2.6 - Total Pedestrian Flows: Nailsworth 2002 to 2004

Location	2002	2003	2004	% Change 2002v2004	% Change 2003v2004
Point 1 - Baileys Opticians, Old Market	6084	8688	9288	52.7	6.9
Point 2 - Cotswolds Kitchens, Market Street	1536	1920	1944	26.6	1.3
Point 3 - CP entrance, Butchers Hill	588	480	3228	449.0	572.5
Point 4 - RSPCA, Market Street	3240	4308	5280	63.0	22.6
Point 5 - Edward Walker, Fountain Street	4224	5652	4476	6.0	-20.8
Point 6 - Leonard Walker, George Street	7056	9180	7392	4.8	-19.5
Point 7 - Springhill, Old Market	1884	4344	4596	143.9	5.8
TOTAL FOOTFALL	24612	34572	36204	47.1	4.7

2.8 As Table 2.6 illustrates, there has been a significant increase in total pedestrian flows when comparing 2004 with the 2002 figures, with a 47.1% increase in total flows. There is also a 4.7% increase recorded in total flows against 2003 figures. Most notably, Point 3 has recorded a vast increase on flows on previous years, with a 449% increase over 2002 figures and a 572.5% increase over 2003 statistics, which suggests that there has been a catalyst for movement, possibly in the form of new development or an altered pedestrian access/egress to the car park. The only decreases have been at Points 5 and 6 on Fountain Street and George Street, respectively, which have both seen a decrease in the region of 20% on total pedestrian flows when comparing 2004 with 2003.

AVERAGE FLOWS PER MINUTE

2.9 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:

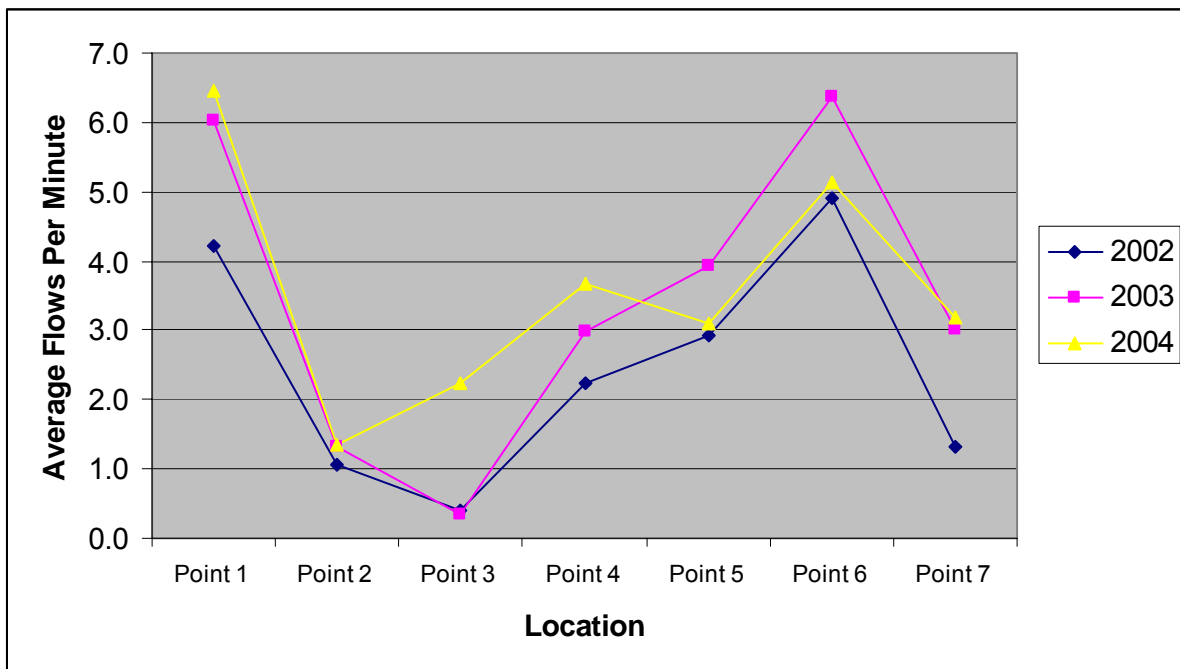
$50 + 60 + 70 = 180$ (total flow for the site over the three days)
 $180 \div 3$ (as in 3 days – the number of survey days) = 60 (average daily flow for the site)
 $60 \div 8$ (as in 8 hours – the length of the survey) = 7.5 (hourly flow)
 7.5 (hourly flow) $\div 60 = 0.1$ people per minute

2.10 Based on the above formula, the average flows per minute at each point in Nailsworth are as follows:

◆ Point 1 - Baileys Opticians	6.5
◆ Point 2 - Cotswolds Kitchens	1.4
◆ Point 3 - Car Park Entrance, Butchers Hill	2.2
◆ Point 4 - RSPCA	3.7
◆ Point 5 - Edward Walker	3.1
◆ Point 6 - Leonard Walker	5.1
◆ Point 7 - Springhill	3.2

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

Figure 2.2 – Average Flows Per Minute in Nailsworth 2002-2004



2.12 Average flows per minute in 2004 are highest at Point 1 on Old Market, averaging 6.5 persons per minute passing this point. This is similar to the previous two years, although there has been a considerable increase since 2002. There has been a slight decrease in footfall since 2003 at Point 6 on George Street and Point 5 on Fountain Street. There has been a marked increase in flow in 2004 at Points 3 and 4, whilst Points 2, 5 and 7 have remained comparatively consistent with previous years.

SITE RANKING

- 2.13 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: Nailsworth

	2003 Rank	2004 Rank	Movement
Point 1 - Baileys Opticians, Old Market	2	1	Up
Point 2 - Cotswolds Kitchens, Market Street	6	7	Down
Point 3 - CP entrance, Butchers Hill	7	6	Up
Point 4 - RSPCA, Market Street	5	3	Up
Point 5 - Edward Walker, Fountain Street	3	5	Down
Point 6 - Leonard Walker, George Street	1	2	Down
Point 7 - Springhill, Old Market	4	4	Same

- 2.14 As Table 2.7 illustrates, there has been a slight shift in pedestrian flows with Point 1 on Old Market replacing Point 6 on George Street as the busiest point. Both Point 4 on Market Street and Point 3 on Butchers Hill have improved in rank, whilst Fountain Street has a lesser ranking than the previous year.

DAILY FLOWS

- 2.15 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 Nailsworth and Table 2.9 shows total daily flow comparisons with 2002 and 2003.

Table 2.8 – Daily Flows: Nailsworth

	Friday 15.10.04		Saturday 16.10.04		Tuesday 19.10.04	
	Total	Rank	Total	Rank	Total	Rank
Point 1 - Baileys Opticians, Old Market	3060	1	3900	1	2328	1
Point 2 - Cotswolds Kitchens, Market Street	492	7	744	7	708	7
Point 3 - CP entrance, Butchers Hill	1224	6	1092	6	912	6
Point 4 - RSPCA, Market Street	2340	2	1536	5	1404	4
Point 5 - Edward Walker, Fountain Street	1368	5	1740	3	1368	5
Point 6 - Leonard Walker, George Street	2328	3	2820	2	2244	2
Point 7 - Springhill, Old Market	1392	4	1608	4	1596	3
Total	12204		13440		10560	

- 2.16 Table 2.8 illustrates a reasonably consistent pattern in daily flow rankings at the seven sites across the three survey days. Point 1 remains consistently the busiest and Points 2 and 3 stay the least busy across the three days. There is, however, some variation between the other sites, particularly Point 4 on Market Street, which was the second busiest site on the Friday and yet the fifth busiest the following day.

Table 2.9 – Total Daily Flow Comparisons: Nailsworth

	2002	2003	2004	%Change 2004v2002	%Change 2004v2003
Tuesday	4596	12252	10560	129.8	-13.8
Friday	8328	9312	12204	46.5	31.1
Saturday	11688	13008	13440	15.0	3.3

- 2.17 Overall, a positive pattern of growth appears to be emerging in Nailsworth over the past three years, with considerable increases in pedestrian movements between 2002 and 2004 on each of the three survey days. The figures for Tuesday were slightly less than the equivalent day in 2003, although the figure is still up 129.8% on 2002. There has been a lesser increase on Saturdays, particularly between 2003 and 2004 where a 3.3% change has been noted, but an increase nonetheless.

TIME OF DAY ANALYSIS

- 2.18 Table 2.10 shows the time of day variations for Nailsworth and Fig 2.3 provides a time of day comparison with 2003.

Table 2.10 - Time of Day: Nailsworth by Site

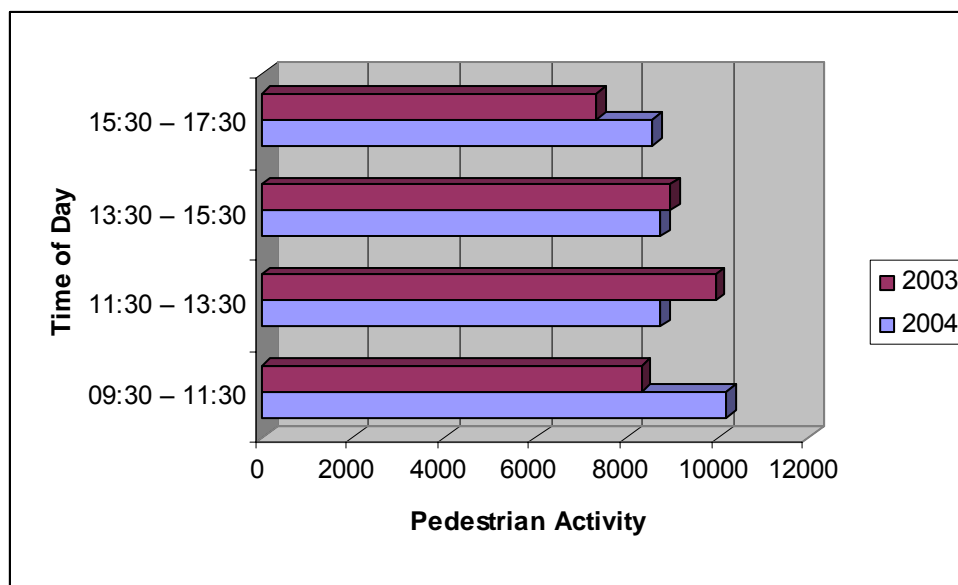
Site	09:30 –	%	11:30 –	%	13:30 –	%	15:30 –	%
	11:30		13:30		15:30		17:30	
Point 1 - Baileys Opticians, Old Market	2856	30.7	1920	20.7	1884	20.3	2628	28.3
Point 2 - Cotswolds Kitchens, Market Street	732	37.7	384	19.8	348	17.9	480	24.7
Point 3 - CP entrance, Butchers Hill	672	20.8	804	24.9	996	30.9	756	23.4
Point 4 - RSPCA, Market Street	1476	28.0	1392	26.4	1188	22.5	1224	23.2
Point 5 - Edward Walker, Fountain Street	1176	26.3	1260	28.2	1116	24.9	924	20.6

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Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
Point 6 - Leonard Walker, George Street	1968	26.6	2004	27.1	1944	26.3	1476	20.0
Point 7 - Springhill, Old Market	1296	28.2	972	21.1	1260	27.4	1068	23.2
Total	10176	28.1	8736	24.1	8736	24.1	8556	23.6

- 2.19 Although the variation is comparatively slight, there is a clear overall trend for greater pedestrian activity in the morning between 09:30 and 11:30 than at other times of day. This trend is particularly acute at Points 1 and 2 which have, on average, 30.7% and 37.7% of their activity during these hours, respectively. These points are also more likely to be busy towards the end of the day between 15:30 and 17:30 than during the middle.

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



- 2.20 There is some variation between times of day trends when compared with 2003. During the 2003 count there was greater activity, on average, during the middle of the day than at the beginning and end. In 2004 there is a greater trend for activity in the morning, with comparatively even spread of flow throughout the rest of the day.

MARKET DAY ANALYSIS

- 2.21 As Table 2.11 illustrates, counts undertaken to account for the monthly farmer's market indicate a 13.6% decrease on the flows for the non-market day. It should be noted, however, that particularly poor weather conditions were prevalent at the time of the market day count, which will have inevitably had an effect upon results.

Table 2.11 – Market Day Analysis – Nailsworth 2004

Site	23.10.04 Market		16.10.04 Non Market		% change
	Total	Rank	Total	Rank	
Point 1 - Baileys Opticians, Old Market	2712	1	3900	1	-30.5
Point 2 - Cotswolds Kitchens, Market Street	612	7	744	7	-17.7
Point 3 - CP entrance, Butchers Hill	1092	6	1092	6	0.0
Point 4 - RSPCA, Market Street	1236	5	1536	5	-19.5
Point 5 - Edward Walker, Fountain Street	1920	3	1740	3	10.3
Point 6 - Leonard Walker, George Street	2568	2	2820	2	-8.9
Point 7 - Springhill, Old Market	1476	4	1608	4	-8.2
Total	11616		13440		-13.6

2.22 It is likely that the market has had some effect upon results. Point 5 on Fountain Street, the point closest to the market site saw a 10.3% increase in flow over the non-market Saturday. Market activities are concentrated in the morning - this is reflected in Table 2.12, which illustrates that 58.3% of pedestrian activity was concentrated on the market day morning, compared to 52.2% non-market average. It can therefore be concluded that the market has some effect upon pedestrian activity, although overall rankings of flow remain the same on both market and non-market days.

Table 2.12 - Market Day Analysis by Time of Day – Nailsworth 2004

Site	09:30 – 11:30		11:30 – 13:30		13:30 – 15:30		15:30 – 17:30	
		%		%		%		%
Point 1 - Baileys Opticians, Old Market	1068	39.4	744	27.4	516	19.0	384	14.2
Point 2 - Cotswolds Kitchens, Market Street	228	37.3	204	33.3	84	13.7	96	15.7
Point 3 - CP entrance, Butchers Hill	312	28.6	180	16.5	408	37.4	192	17.6
Point 4 - RSPCA, Market Street	372	30.1	300	24.3	312	25.2	252	20.4
Point 5 - Edward Walker, Fountain Street	660	34.4	624	32.5	480	25.0	156	8.1

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Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
Point 6 - Leonard Walker, George Street	780	30.4	636	24.8	624	24.3	528	20.6
Point 7 - Springhill, Old Market	396	26.8	252	17.1	456	30.9	372	25.2
Total	3816	32.9	2940	25.3	2880	24.8	1980	17.0

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 Nailsworth, 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 high demand for office and shop space in some of the smaller Stroud District Market towns, notably in Nailsworth where there is relatively high demand for retail space, particularly in the form of alternative style shops. It is noted that such vacant units are generally taken up fairly quickly.

VACANCY IN NAILSWORTH

- 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 contains the vacancy analysis for Nailsworth. 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 indicating where there has been a change in unit status. 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 - Vacancy Analysis: Nailsworth 2003/2004

Address	Ground Floor	First Floor	Ground Floor	First Floor
15 Fountain Street			√*	
15 Fountain Street		√		√
17 Fountain Street		√		√
Building to rear of Bank, George Street	√	√	√	√
Corner Market Street and Butchers Hill Lane		√		√
Corner Market Street and Fountain Street	√	√	*	√
Corner Market Street and Newmarket Road		√		√
Market Street (a)	√		√	
Market Street (b)	√		√	
Market Street (c)	√(3)	√(3)	√(1)*	√(3)
Market Street (d)		√(3)		√(3)
Market Street (e)	√(2)		*	
Newmarket Road	√		*	
Newmarket Road		√		*

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 – Vacancy by Type: Nailsworth

Type	No. of Units	%	No. of Units	%	% Change 2004v2003
Retail	6	26	1	6	-83
Business	4	17	4	24	0
Residential/Other	13	57	12	71	-8
TOTAL	23	100	17	100	-26

3.11 As Tables 3.1 and 3.2 indicate there has been an overall decrease in vacancy in Nailsworth over the past year, with a 26% decrease in total vacancies from 23 units to 17 units on ground and first floors. Improvement has been particularly prolific in the retail sector where there is now only one vacant unit (located on Market Street).

- 3.12 Most improvement has been in the vicinity of Market Street. Notable lettings in this area have included a new café taking up two former derelict units and a new vernacular mixed use development at the corner of Market Street and Fountain Street, comprising residential accommodation and two ground floor units, both of which were in the process of becoming occupied at the time of survey. There is less vacant residential/other property in comparison to the previous year, whilst vacant business premises have remained at the same level of four vacant units located within the study area.

Land Uses

Table 3.3 – Land Uses: Nailsworth 2004

	Ground Floor (GF)	% of GF units	Upper Floor (UF)	% of UF units	Total units	% of Total Units
Convenience	13	10	1	1	14	6
Comparison	52	39	9	9	62	27
Food and entertainment	7	5	1	1	8	4
Residential	12	9	42	44	54	24
Offices	11	8	9	9	20	9
Service	32	24	21	22	53	23
Vacant	5	4	12	13	16	7
TOTAL	132	100	95	100	227	100

- 3.13 Nailsworth has two main shopping areas within the town core, severed and segregated to some degree by the road layout – there is a mini-roundabout arrangement at the western end of the town that is somewhat awkward for non-motorised users, and the arrangement of parking and access/egress at Old Market make pedestrian circulation hazardous, particularly at peak times.
- 3.14 The town has a sizeable comparison retail element of 62 units (over a quarter of all units: 27%), which comprise a mix of independent, specialist, ‘boutique’ and ‘high street names’ serving as trip generators. The town is branded as a “fair trade” town and many of the shops now specialise in organic and fair trade produce. There is also a considerable mix of businesses in the service and food and entertainment sectors including popular restaurants, cafés and pubs.
- 3.15 Residential units are also well represented in the centre of Nailsworth, with a total of 54 units being identified (24% of all units). The office sector appears to be modest in size, representing just 9% of all units.

4. Findings

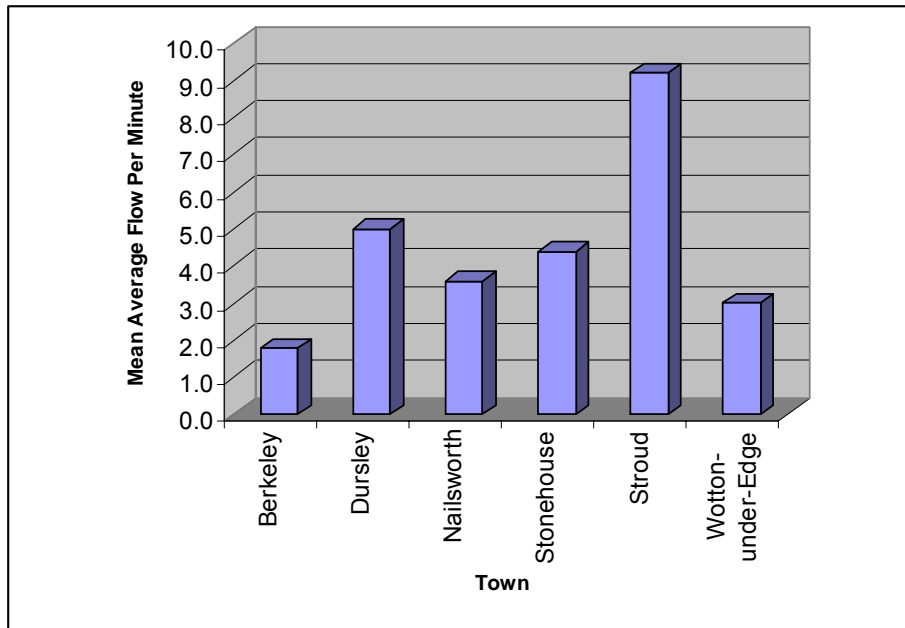
PEDESTRIAN FOOTFALL

- 4.1 There has been a considerable increase in pedestrian footfall in Nailsworth over the past two years. The 2004 count saw an increase on average of 47.1% in comparison to 2002 and 4.7% compared to 2003. Average flows per minute are higher at most points across the town in comparison to 2004 with the exception of Points 5,6 and 7 which are marginally lower, although all points have greater average flows per minute than 2002.
- 4.2 Although counts undertaken on the Tuesday are 129.8% higher than in 2002, there has been a decrease of 13.8% in comparison to the Tuesday count undertaken in 2003. All other flows have increased, with a 31.1% increase when comparing the counts undertaken on the Friday in 2004 and 2003 and a 3.3% increase on the equivalent Saturday counts.
- 4.3 Point 1 on Old Market is now ranked as the Point with the most pedestrian activity, which has replaced Point 6 on George Street. Point 2 outside Cotswold Kitchens on Market Street is now the least busy location.
- 4.4 Flows are comparatively evenly spread throughout the day on average, with a slightly higher proportion of activity in the mornings. Mornings have a greater proportion of activity on the market day when 58.2% of pedestrian activity occurred between 09:30 and 12:30.
- 4.5 The market day count is, on average, less than the non-market day count – down 13.6%. It is considered that this can, however, be mainly attributed to bad weather conditions at the time of the market day count, as Point 5 (closest to the market site) saw a 10.3% increase in activity, the only point where an increase occurred.

Comparison With Other Towns

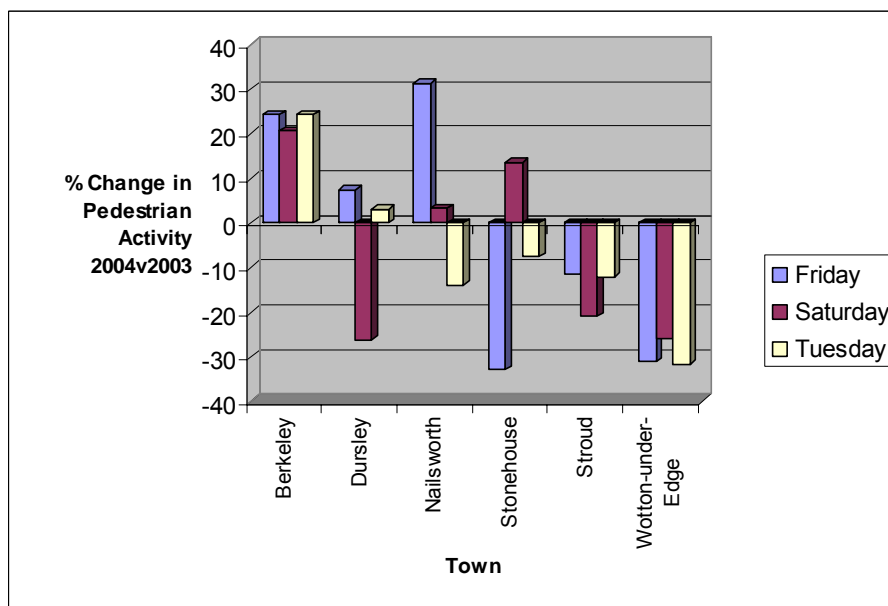
- 4.6 In order to provide a comparison between the towns, mean average flow per minute has been calculated for all towns, as illustrated in Figure 4.1
- 4.7 As Figure 4.1 shows overleaf, Nailsworth has below average flows per minute when compared to the other study area towns - the mean average flow per minute is just over 3 pedestrian movements per minute.

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



4.8 Figure 4.2 provides a comparison between each of the six towns in terms of percentage change in pedestrian activity from 2003 to 2004 across the three survey days. The chart shows Nailsworth to be one of the few towns that has seen substantial increases in pedestrian activity in comparison to the previous year, particularly on the Friday, which saw the greatest rise in pedestrian activity on any day in any town.

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



VACANCY AND LAND-USE

- 4.9 Conversations with commercial property agents have indicated that there has been a particularly high demand for retail space in Nailsworth, particularly in the form of alternative type shops, and vacancies have been taken up quickly. This is reflected by a considerable reduction in vacant retail units from six in the 2003 survey to just one in 2004.
- 4.10 This has particularly affected the Market Street area where most of the vacant units were located and all except one have since been let. Notable developments here include a café in two former derelict units and a new mixed use development at the junction with Fountain Street, including two new units.
- 4.11 There has also been an improvement in the residential/other sector, although the number of vacant business units has remained the same as 2003, totalling four.



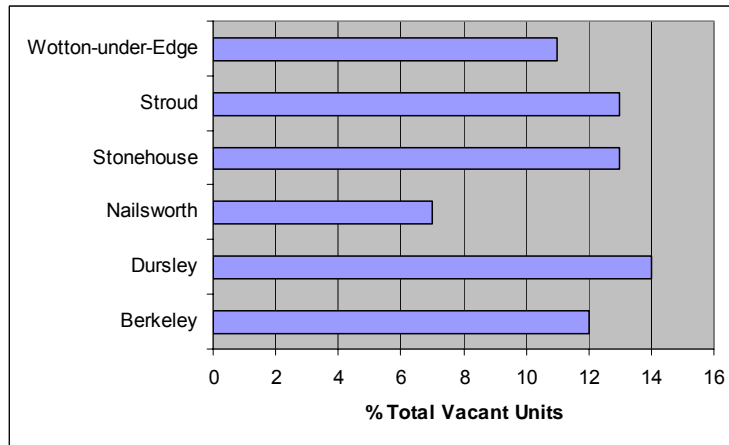
Market Street Area – Considerably less vacancy than previous year (above). New mixed use development at junction with Fountain Street (below)



Comparison With Other Towns

4.12 As Figure 4.3 indicates, Nailsworth has a considerably lesser proportion of its central area comprising vacant units in comparison with the other five towns. 7% of all units in Nailsworth are vacant, which equates to half that of Dursley and considerably less than all other towns.

Figure 4.3 – Comparison of % Vacant Units Within Study Towns



4.13 Figure 4.4 shows percentage change in vacancy across all sectors in each of the towns over the past year. Nailsworth is the only town, with the exception of Stroud, to see either improvements or no change across all sectors and has seen the largest improvements of any town in terms of vacant retail units and total vacancy.

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

