

# Stroud District Market Towns Study

## Stonehouse:

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

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## Contents

<i>Section</i>	<i>Page</i>
<b>1. Introduction</b>	<b>1-1</b>
Pedestrian Flow Counts	1-1
Land Use and Vacancy Assessment	1-1
<b>2. Pedestrian Flow Count Analysis</b>	<b>2-1</b>
Methodology	2-1
Counting Sites	2-2
Flow Count Summaries	2-2
Average Daily Comparisons with Previous Years, 2002 to 2004	2-3
Average Flows Per Minute	2-3
Site Ranking	2-5
Daily Flows	2-5
Time of Day Analysis	2-6
<b>3. Land Use and Vacant Premises Audit and Analysis</b>	<b>3-1</b>
The Audit Process	3-1
Walkover Surveys	3-1
Desk-Based Research	3-2
Vacancy In Stonehouse	3-2
Land Uses in Stonehouse	3-4
<b>4. Findings</b>	<b>4-1</b>
Pedestrian Footfall	4-1
Vacancy and Land-use	4-3

### List of Tables

Table 2.1 – Number of Counting points, Count Duration and Date of Counts 2004	2-1
Table 2.2 – Stonehouse Pedestrian Count Results: Friday 15 <sup>th</sup> October 2004	2-2
Table 2.3 – Stonehouse Pedestrian Count Results: Saturday 16 <sup>th</sup> October 2004	2-2
Table 2.4 – Stonehouse Pedestrian Count Results: Tuesday 19 <sup>th</sup> October 2004	2-3
Table 2.5 - Total Pedestrian Flows: Stonehouse 2002 to 2004	2-3
Table 2.6 – Relative Change in Ranking: Stonehouse	2-5

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Table 2.7 – Daily Flows: Stonehouse	2-5
Table 2.8 – Total Daily Flow Comparisons: Stonehouse	2-5
Table 2.9 - Time of Day: Stonehouse by Site	2-6
Table 3.1 - 2003/2004 Vacancy Analysis: Stonehouse	3-3
Table 3.2 – Vacancy by Type: Stonehouse 2003/2004	3-3
Table 3.3 – Land Uses: Stonehouse	3-4

**List of Figures**

Figure 2.1 – Pedestrian Count Points	
Figure 2.2 – Average Flows per Minute in Stonehouse 2003 and 2004	
Figure 2.3 – Time of Day: Stonehouse 2004/2003 Comparison	
Figure 4.1 – Mean Average Flow Per Minute in the Six Study Towns	
Figure 4.2 - Comparison of Change in Pedestrian Activity across the Six Study Towns between 2003 and 2004	
Figure 4.3 – Comparison of % Vacant Units Within Study Towns	
Figure 4.4 - Percentage Change in Vacant Units Across All Towns 2003-2004	

## 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 Stonehouse.
- 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 Stonehouse:
- ◆ 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;
  - ◆ 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 <sup>th</sup> October Saturday 16 <sup>th</sup> October* Tuesday 19 <sup>th</sup> October Saturday 23 <sup>rd</sup> October
Dursley	6	7	Friday 15 <sup>th</sup> October Saturday 16 <sup>th</sup> October Tuesday 19 <sup>th</sup> October Saturday 23 <sup>rd</sup> October*
Nailsworth	7	5	Friday 15 <sup>th</sup> October Saturday 16 <sup>th</sup> October Tuesday 19 <sup>th</sup> October Saturday 23 <sup>rd</sup> October*
Stonehouse	3	12	Friday 15 <sup>th</sup> October Saturday 16 <sup>th</sup> October Tuesday 19 <sup>th</sup> October
Stroud	16	5	Friday 15 <sup>th</sup> October Saturday 16 <sup>th</sup> October* Tuesday 19 <sup>th</sup> October Saturday 23 <sup>rd</sup> October
Wotton-under-Edge	6	7	Friday 15 <sup>th</sup> October Saturday 16 <sup>th</sup> October Tuesday 19 <sup>th</sup> October Saturday 6 <sup>th</sup> November*

\* Indicates market day count

- 2.2 As indicated in Table 2.1, counts were undertaken in each of the centres on Friday 15<sup>th</sup> October, Saturday 16<sup>th</sup> October and Tuesday 19<sup>th</sup> October. Additional counts were undertaken on Saturday 23<sup>rd</sup> 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 6<sup>th</sup> 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 SITES

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

- ◆ **Point 1** - Threshers, High Street
- ◆ **Point 2** - Police Station, High Street
- ◆ **Point 3** - Post Office Building, High Street

### FLOW COUNT SUMMARIES

#### Raw Data

- 2.6 Full details of the 12 minute pedestrian counts at each location are provided in Tables 2.2 to 2.4 for each of the three days. Although poor weather was noted on each day, enumerators reported no other problems or factors that may have affected the results.

**Table 2.2 – Stonehouse Pedestrian Count Results: Friday 15<sup>th</sup> October 2004**

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
Weather	Dry	Bright	Drizzle	Bright	Dry	Rain	Rain	Bright
Point 1 - Threshers	39	39	28	49	43	34	20	27
Point 2 – Police Station	65	60	70	89	68	46	41	51
Point 3 – Post Office Building	43	49	36	57	49	72	26	40

**Table 2.3 – Stonehouse Pedestrian Count Results: Saturday 16<sup>th</sup> October 2004**

Time	0930-1030	1030-1130	1130-1230	1230-1330	1330-1430	1430-1530	1530-1630	1630-1730
Weather	Dry	Dry	Dry	Dry	Drizzle	Drizzle	Rain	Dry
Point 1 - Threshers	44	54	72	44	36	24	24	20
Point 2 – Police Station	107	107	77	61	64	60	72	58
Point 3 – PO Bldg	68	53	47	47	78	61	30	35

**Table 2.4 – Stonehouse 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	Bright	Bright	Mild
Point 1 - Threshers	39	34	43	31	26	38	113	44
Point 2 – Police Station	71	73	57	32	58	74	85	78
Point 3 – Post Office Building	58	57	52	47	27	60	49	74

**AVERAGE DAILY COMPARISONS WITH PREVIOUS YEARS, 2002 TO 2004**

- 2.7 In order to enable 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.
- 2.8 Table 2.5 provides a comparison of pedestrian flows in Stonehouse in 2002, 2003 and 2004 aggregated at each site for the three days. It illustrates a progressive fall in pedestrian flows, down 19.3% on 2003 and over a quarter (25.6%) on 2002. Although this may be partly to do with the poor weather conditions in 2004 in comparison to the previous year, it is a considerable decrease. Decline in pedestrian flows are particularly notable at Point 1, where there has been a fall of 49.4% between 2002 and 2004.

**Table 2.5 - Total Pedestrian Flows: Stonehouse 2002 to 2004**

Location	2002	2003	2004	% Change 2002v2004	% Change 2003v2004
Point 1 - Threshers	9540	5890	4825	-49.4	-18.1
Point 2 - Police Station	9910	8340	8120	-18.1	-2.6
Point 3 - Post Office Building	6115	7330	6075	-0.7	-17.1
<b>TOTAL FOOTFALL</b>	<b>25565</b>	<b>23563</b>	<b>19020</b>	<b>-25.6</b>	<b>-19.3</b>

**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:

$$50 + 60 + 70 = 180 \text{ (total flow for the site over the three days)}$$

$$180 \text{ divided by } 3 \text{ (as in 3 days – the number of survey days)} = 60 \text{ (average daily flow for the site)}$$

$$60 \text{ divided by } 8 \text{ (as in 8 hours – the length of the survey)} = 7.5 \text{ (hourly flow)}$$

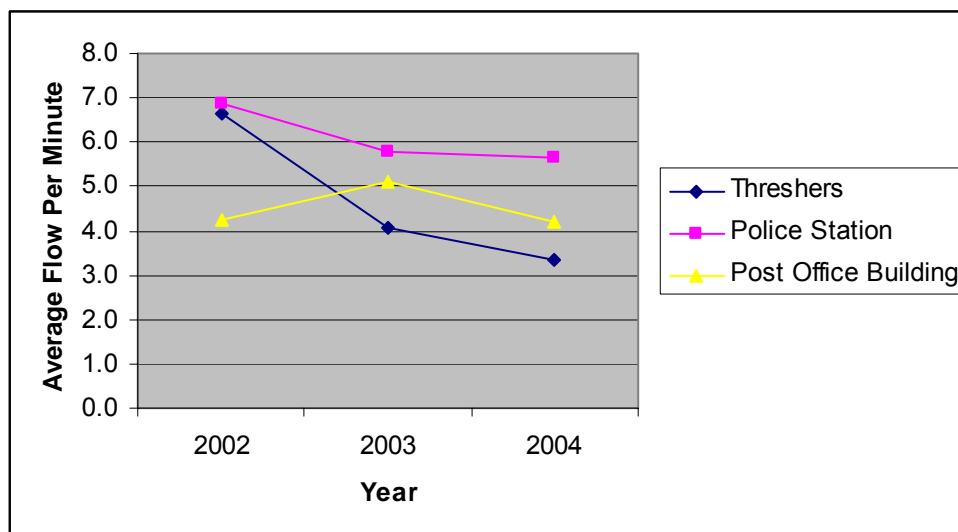
$$7.5 \text{ (hourly flow) divided by } 60 = 0.1 \text{ people per minute}$$

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

◆ Threshers	3.4
◆ Police Station	5.6
◆ Post Office Building	4.2

2.11 Comparison with the previous two years is shown in **Figure 2.2** below:

**Figure 2.2 – Average Flows Per Minute in Stonehouse 2002-2004**



2.12 Average flows per minute in 2004 remain highest at Point 2, between the Police Station and Co-op Supermarket, which is the main retail anchor in Stonehouse. There has been a decrease on the previous year at all points, although the decline has been lesser at Point 2 compared to the other two points. Poor weather may again be a factor in the decline on the previous year.

## SITE RANKING

- 2.13 Table 2.6 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 2.6 – Relative Change in Ranking: Stonehouse**

	2003 Rank	2004 Rank	Movement
Point 1 - Threshers	3	3	Same
Point 2 - Police Station	1	1	Same
Point 3 - Post Office Building	2	2	Same

- 2.14 Flow count site rankings in 2004 have remained the same as the previous year, as illustrated in Table 2.6. As such, Point 2 remains the busiest counting point, and Point 1 at the north of the High Street is the quietest.

## DAILY FLOWS

- 2.15 Table 2.7 shows daily flows at each of the counting points and relative ranking on each of the three survey days in Stonehouse. Table 2.8 shows total daily flow comparisons with 2002 and 2003.

**Table 2.7 – Daily Flows: Stonehouse**

	Friday 15.10.04		Saturday 16.10.04		Tuesday 19.10.04	
	Total	Rank	Total	Rank	Total	Rank
Point 1 - Threshers	1395	3	1590	3	1840	3
Point 2 - Police Station	2450	1	3030	1	2640	1
Point 3 - Post Office Building	1860	2	2095	2	2120	2
<b>TOTAL FLOWS</b>	<b>5705</b>		<b>6715</b>		<b>6600</b>	

- 2.16 The highest pedestrian activity of the three days was recorded on the Saturday, whilst Friday had the least pedestrian activity. The ranking of each location remains the same across all three survey days, with Point 2 remaining busiest throughout.

**Table 2.8 – Total Daily Flow Comparisons: Stonehouse**

	2002	2003	2004	%Change 2004v2002	%Change 2004v2003
Tuesday	5965	7145	6600	10.6	-7.6
Friday	9520	8500	5705	-40.1	-32.9
Saturday	10080	5915	6715	-33.4	13.5

- 2.17 Whilst Saturday was the busiest day in 2002, it recorded the lowest footfall levels in 2003. This trend has, however, been reversed in 2004 and although the figures are 33.4% lower than 2002, an increase of 13.5% has occurred on 2003. Although the figures for Tuesday are up 10.6% on the 2002 count, there has been a decrease of 7.6% on the previous year (2003). Figures for Friday have declined continuously for the past three years, with pedestrian activity down 40.1% on 2002 and 32.9% on 2003.

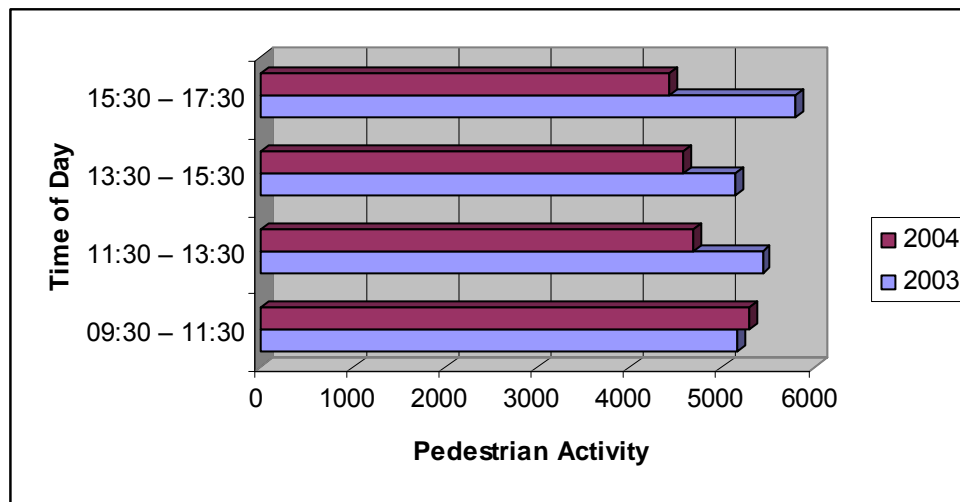
### TIME OF DAY ANALYSIS

- 2.18 Table 2.9 shows time of day variations for Stonehouse and Fig 2.3 provides a time of day comparison with 2003.

**Table 2.9 - Time of Day: Stonehouse by Site**

	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
Point 1 - Threshers	1245	25.8	1335	27.7	1005	20.8	1240	25.7
Point 2 - Police Station	2415	29.7	1930	23.8	1850	22.8	1925	23.7
Point 3 - Post Office Building	1640	27.0	1430	23.5	1735	28.6	1270	20.9
<b>Total</b>	<b>5300</b>	<b>27.9</b>	<b>4695</b>	<b>24.7</b>	<b>4590</b>	<b>24.1</b>	<b>4435</b>	<b>23.3</b>

**Figure 2.3 – Time of Day: Stonehouse 2004/2003 Comparison**



- 2.19 Proportions of pedestrian flow were fairly evenly spread throughout the days across all three sites, with the total for each area varying by less than 5%. The even spread follows a similar pattern to 2003, although total flows between 9:30 and 11:30 are slightly greater than the previous year, and flows between 15.30 and 17.30 are much lower.

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## 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 Stonehouse, 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 12<sup>th</sup> 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.

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- 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](http://www.glosfirst.co.uk);
- ◆ Alder King Property Consultants;
- ◆ Andrew Watton Chartered Surveyors;
- ◆ BK The Property Assets Consultancy;
- ◆ Downing Bentley Chartered Surveyors.

- 3.8 None of the agents had any comment to make with explicit regard to Stonehouse. However, it was noted that there is currently a high demand for both office and retail space throughout most of the market towns surrounding Stroud.

#### **VACANCY IN STONEHOUSE**

- 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 - 2003/2004 Vacancy Analysis: Stonehouse**

Address	2003		2004	
	Ground Floor	First Floor	Ground Floor	First Floor
1 Barnard Parade			√*	
4 Barnard Parade		√		√
5 Barnard Parade	√	√	*	√
6 Barnard Parade		√	√*	√
adjacent to Surgery, High Street	√	√(2)	√	√(2)
12 High Street		√		√
14 High Street		√		√
15 High Street	√		√	
20 High Street		√		√
32 High Street		√		*
part of 40 High Street		√		√
2 Queens Road	√	N/A	√	N/A
4 Queens Road		N/A	√*	N/A
6 Queens Road		N/A	√*	N/A

Numbers in brackets indicate multiple units at one address, \* indicates change in unit status

3.11 KEY:

	Retail
	Business
	Residential/Other

**Table 3.2 – Vacancy by Type: Stonehouse 2003/2004**

Type	2003		2004		% Change 2004v2003
	No. of Units	%	No. of Units	%	
Retail	2	14	4	25	100
Business	7	50	8	50	14
Residential/Other	5	36	4	25	-20
<b>TOTAL</b>	<b>14</b>	<b>100</b>	<b>16</b>	<b>100</b>	<b>14</b>

3.12 A total of 16 vacant units were identified in the 2004 Stonehouse audit, which represent 10% of all units identified as part of the process (Table 3.3). Of these 16, four are retail units. Notable changes over the past year include the loss of the former Spar convenience store at 1 Barnard Parade and two further retail units on

Queens Road, although the latter units appeared to be in the process of renovation at the time of survey.

- 3.13 The greatest proportion of vacant units – 50% - continues to be those previously occupied by business uses, with a further 25% falling into the ‘residential/other’ category representing a small improvement on the 2003 statistics.

#### LAND USES IN STONEHOUSE

- 3.14 Stonehouse is a compact and linear centre, with almost all services accessed directly from the main High Street. Offices have the largest proportional representation – representing a quarter of all units (25%), largely comprising first floor accommodation. Residential uses are also prominent, representing 22% of all units in the town centre. There is a modest element of comparison retail units – 14% of total units, although these are almost exclusively independently run, specialist shops. Convenience uses represent 4% of the total, comprising a modern co-operative supermarket and a small number of ‘traditional’ butchers/bakers/grocery stores. 12% of ground floor units comprise “food and entertainment” including a pub and several takeaways/cafés.

**Table 3.3 – Land Uses: Stonehouse**

	Ground Floor (GF)	% of GF units	Upper Floor (UF)	% of UF units	Total units	% of Total Units
Convenience	5	6	1	2	6	4
Comparison	17	22	3	5	20	14
Food & entertainment	9	12	0	0	9	6
Residential	6	8	25	38	31	22
Offices	15	19	21	32	36	25
Service	17	22	6	9	23	16
Vacant	9	12	10	15	19	13
<b>TOTAL</b>	<b>78</b>	<b>100</b>	<b>66</b>	<b>100</b>	<b>144</b>	<b>100</b>

## 4. Findings

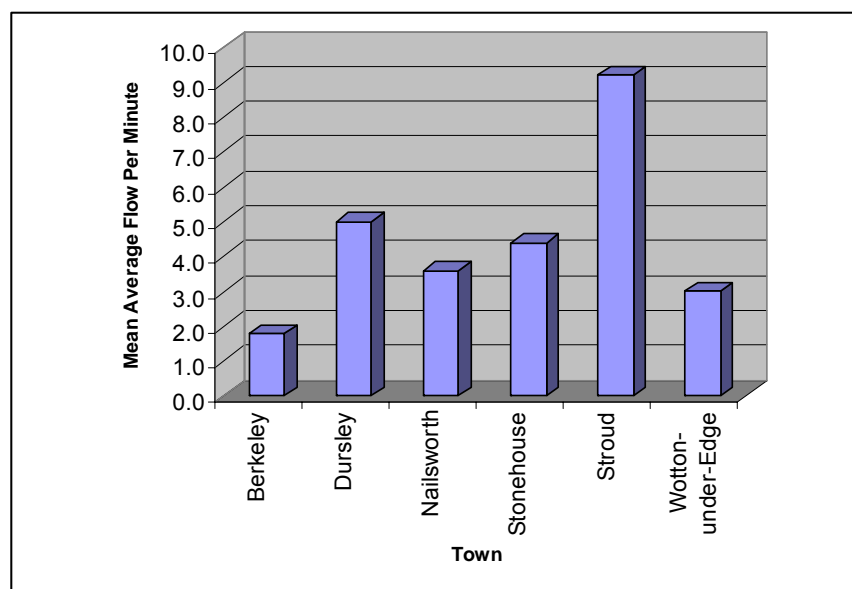
### PEDESTRIAN FOOTFALL

- 4.1 There has been a progressive fall in pedestrian activity flows in Stonehouse since 2002. This year's total pedestrian flow results are, on average, down 19.3% on 2003 and 25.6% on 2002. This is particularly apparent at the northern end of the town in the vicinity of counting point one, outside the Threshers store.
- 4.2 Average flows per minute are also down on the previous two years. Flows are highest at Point 2 adjacent to the police station and co-op supermarket. All sites have retained the same ranking as in the previous year.
- 4.3 Of the three survey days, Saturday had the greatest amount of pedestrian activity, whilst Friday had the least. Tuesday and Friday saw a decline in pedestrian activity on the previous year, Friday was particularly affected, down 40.1% on the 2002 results.
- 4.4 Pedestrian activity is, on average, split relatively evenly across the day with just over half (52.6%) of activity recorded in the mornings across the three days.

### Comparison With Other Towns

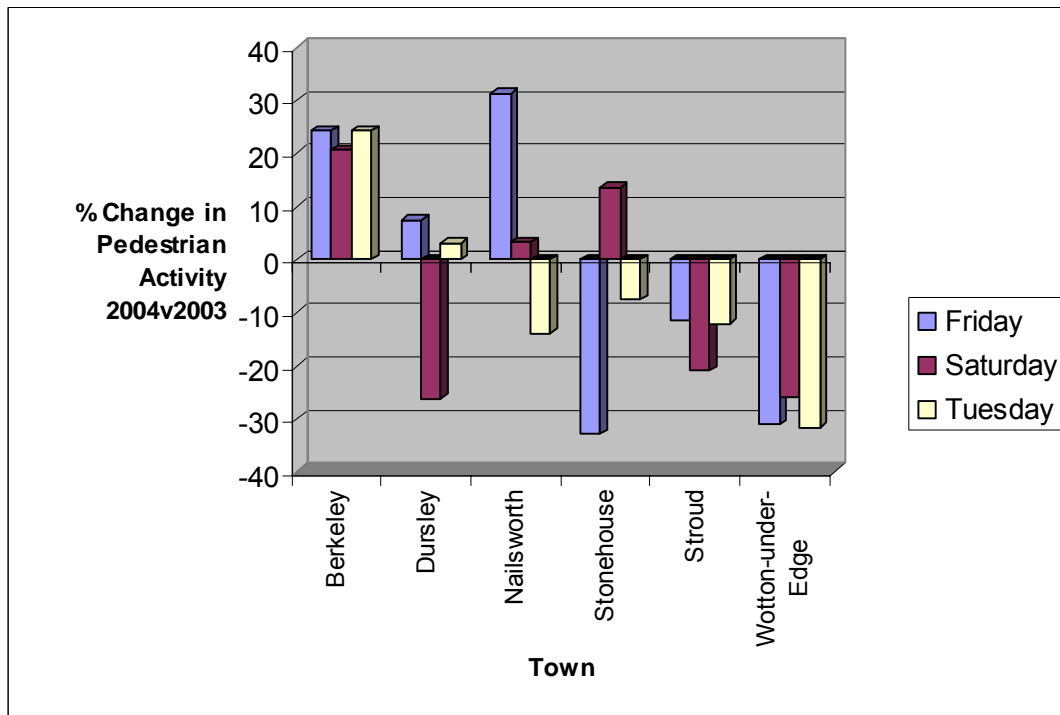
- 4.5 In order to provide a comparison between the towns, mean average flow per minute has been calculated for all towns, as illustrated in Figure 4.1. It shows Stonehouse has comparatively high mean average flows per minute, placed third in the ranking after Stroud and Dursley. This is likely to be partly due to the small geographic area of the town centre in comparison to the other towns where pedestrian activity is more likely to be dispersed across wider areas.

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



- 4.6 Figure 4.2 provides a comparison between each of the six towns in terms of percentage change in pedestrian activity over the three survey days between 2003 and 2004. The chart shows Stonehouse to have had the steepest decline in pedestrian activity on the Friday, although it has seen the second highest rise in activity on the Saturday count. Stroud and Wotton-under-Edge appear to have seen greater declines in pedestrian patronage however.

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



### VACANCY AND LAND-USE

- 4.7 Stonehouse has seen an increase in the amount of vacant units over the past year, up 14% on 2003 (although this only accounts for two units).
- 4.8 Retail vacancy is particularly apparent at the southern end of the town at Barnard Parade where a convenience store has closed in the last year, and on Queens Road that now has three vacant retail units.

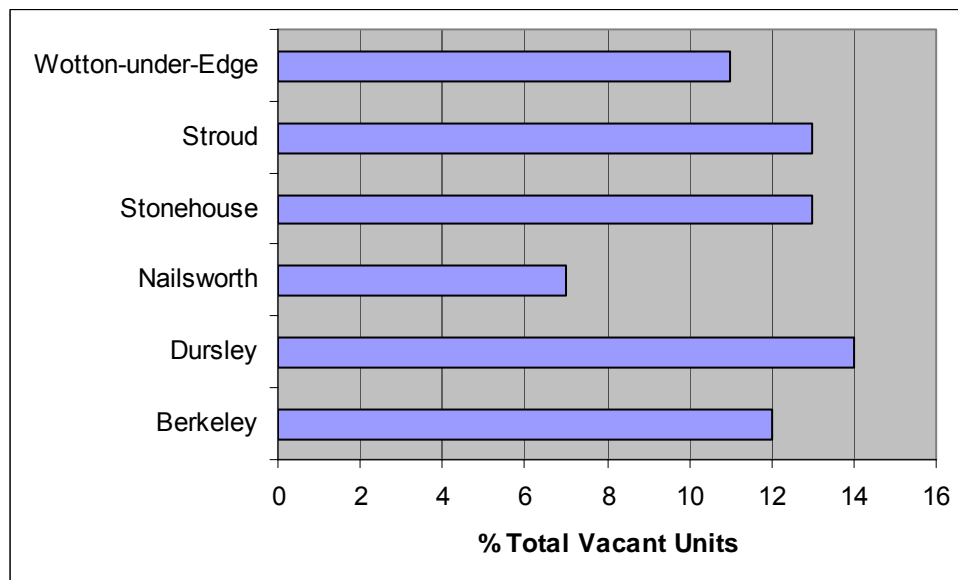


*Barnard Parade – high level of vacancy including loss of convenience store*

### Comparison With Other Towns

- 4.9 As Figure 4.3 indicates, Stonehouse has a comparatively high proportion of total vacant units comprising 13% of its stock. This is the same proportion as Stroud. Only Dursley has a higher proportion out of the six comparable towns.

**Figure 4.3 – Comparison of % Vacant Units Within Study Towns**



- 4.10 Figure 4.4 shows percentage change in vacancy across all sectors in each of the towns over the past year. Stonehouse has seen the highest proportional rise in vacant retail units – a 100% rise, although this represent just two units. It is also the only town to have seen a rise in the amount of business vacancy. It has, however, improved in terms of percentage change in residential vacancy to a better extent than any other town.

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

