


# Stroud District Market Towns Study

## Stroud:

### 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 Stroud.
- 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 Stroud:
- ◆ 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 <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

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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 SITES

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

- ◆ **Point 1** - Barclays Bank, King Street
- ◆ **Point 2** - Woolworths, King Street
- ◆ **Point 3** - Abbey National, Merrywalks
- ◆ **Point 4** - Three Cooks, Merrywalks
- ◆ **Point 5** - Robert Smith (Solicitors), Lansdown
- ◆ **Point 6** - Superdrug, High Street
- ◆ **Point 7** - Antics, High Street
- ◆ **Point 8** - Carphone Warehouse, Threadneedle Street
- ◆ **Point 9** - Adams, Union Street
- ◆ **Point 10** - Hamptons, London Road
- ◆ **Point 11** - The Lord John, Russell Street
- ◆ **Point 12** - Halifax, Kendrick Street
- ◆ **Point 13** - YMCA, Kendrick Street
- ◆ **Point 14** - Sue Ryder, George Street
- ◆ **Point 15** - Peter James, Gloucester Street
- ◆ **Point 16** - Tattoo Parlour, Nelson Street

### FLOW COUNT SUMMARIES

- 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 days and Table 2.5 for the Market Day assessment. Apart from poor weather conditions noted by enumerators on each day, the only problem encountered was with the manager of the Merrywalks centre, who refused access to the enumerator after 14:30 on the Tuesday count. This affected the afternoon of the Tuesday and the non-market Saturday counts. However, counts for both points within the centre were able to be carried out satisfactorily from outside the centre as both points were visible from the public highway - this issue is not therefore felt to have affected the counts to any significant degree.

**Table 2.2 – Stroud 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	Dry	Dry	Dry	Dry	Rain	Rain	Dry
Point 1 - Barclays Bank, King Street	72	68	84	116	82	93	92	47
Point 2 - Woolworths, King Street	62	75	72	73	90	51	66	80
Point 3 - Abbey National, Merrywalks	45	41	51	54	57	40	45	32
Point 4 - Three Cooks, Merrywalks	24	45	53	48	43	39	43	46
Point 5 - Robert Smith (solicitors), Lansdown	24	30	24	28	28	23	22	14
Point 6 - Superdrug, High Street	85	90	99	94	133	64	80	48
Point 7 - Antics, High Street	57	56	73	84	76	50	54	62
Point 8 - Carphone Warehouse, Threadneedle Street	22	29	27	27	27	21	28	23
Point 9 - Adams, Union Street	27	35	44	26	20	23	20	22
Point 10 - Hamptons, London Road	50	36	26	31	43	45	25	22
Point 11 - The Lord John, Russell Street	30	35	39	40	37	38	39	38
Point 12 - Halifax, Kendrick Street	68	59	46	57	64	42	45	32
Point 13 - YMCA, Kendrick Street	32	48	36	49	44	32	48	16
Point 14 - Sue Ryder, George Street	63	84	46	68	57	44	40	20
Point 15 - Peter James, Gloucester Street	18	24	24	30	22	17	39	18
Point 16 - Tattoo Parlour, Nelson Street	15	20	23	29	26	21	25	34

**Table 2.3 – Stroud Pedestrian Count Results: Saturday 23<sup>rd</sup> October 2004<sup>1</sup>**

<b>Time</b>	<b>0930-1030</b>	<b>1030-1130</b>	<b>1130-1230</b>	<b>1230-1330</b>	<b>1330-1430</b>	<b>1430-1530</b>	<b>1530-1630</b>	<b>1630-1730</b>
<b>weather</b>	<b>Dull</b>	<b>Cloudy</b>	<b>Rain</b>	<b>Rain</b>	<b>Rain</b>	<b>Rain</b>	<b>Rain</b>	<b>Rain</b>
Point 1 - Barclays Bank, King Street	56	123	164	120	94	100	108	46
Point 2 - Woolworths, King Street	52	96	99	84	82	75	46	41
Point 3 - Abbey National, Merrywalks	62	66	96	84	81	62	52	37
Point 4 - Three Cooks, Merrywalks	40	56	88	87	73	62	62	47
Point 5 - Robert Smith (solicitors), Lansdown	33	52	50	41	53	28	32	18
Point 6 - Superdrug, High Street	70	150	168	48	112	103	84	41
Point 7 - Antics, High Street	44	66	88	64	42	50	45	34
Point 8 - Carphone Warehouse, Threadneedle Street	30	45	30	42	32	32	22	9
Point 9 - Adams, Union Street	22	53	41	47	46	31	30	27
Point 10 - Hamptons, London Road	36	87	67	41	36	45	42	25
Point 11 - The Lord John, Russell Street	32	62	59	60	55	74	33	27
Point 12 - Halifax, Kendrick Street	52	69	71	55	42	48	61	28
Point 13 - YMCA, Kendrick Street	68	68	97	68	70	62	58	24
Point 14 - Sue Ryder, George Street	72	71	83	74	33	47	41	29
Point 15 - Peter James, Gloucester Street	16	41	35	27	50	17	21	19
Point 16 - Tattoo Parlour, Nelson Street	17	21	22	29	33	36	34	29

<sup>1</sup> Counts at Points 3 and 4 were conducted from outside shopping centre due to access being denied to the enumerator by the Shopping Centre Manager.

**Table 2.4 – Stroud Pedestrian Count Results: Tuesday 19th October 2004<sup>2</sup>**

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 - Barclays Bank, King Street	36	59	86	91	86	88	66	54
Point 2 - Woolworths, King Street	48	59	68	51	92	56	57	55
Point 3 - Abbey National, Merrywalks	50	44	39	32	32	27	28	41
Point 4 - Three Cooks, Merrywalks	40	57	48	51	45	39	35	36
Point 5 - Robert Smith (solicitors), Lansdown	15	33	51	33	49	38	33	19
Point 6 - Superdrug, High Street	80	67	62	71	68	53	101	56
Point 7 - Antics, High Street	10	37	33	43	31	27	35	28
Point 8 - Carphone Warehouse, Threadneedle Street	11	20	39	26	24	10	24	8
Point 9 - Adams, Union Street	17	27	17	26	22	25	17	24
Point 10 - Hamptons, London Road	32	30	27	23	25	25	34	26
Point 11 - The Lord John, Russell Street	30	21	19	34	29	29	31	28
Point 12 - Halifax, Kendrick Street	40	40	35	56	36	28	49	12
Point 13 - YMCA, Kendrick Street	33	41	42	78	45	47	39	14
Point 14 - Sue Ryder, George Street	28	27	37	42	33	40	42	20
Point 15 - Peter James, Gloucester Street	19	23	8	11	9	16	19	10
Point 16 - Tattoo Parlour, Nelson Street	7	11	10	14	11	19	16	19

<sup>2</sup> Counts at Points 3 and 4 were conducted from outside shopping centre from 14:30 onwards due to access being denied to the enumerator by the Shopping Centre Manager.

**Table 2.5 – Stroud Pedestrian Count Results – Market Day – 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	Dry	Rain	Dry	Dry
Point 1 - Barclays Bank, King Street	66	169	57	154	143	145	74	124
Point 2 - Woolworths, King Street	66	102	130	111	121	123	86	47
Point 3 - Abbey National, Merrywalks	45	96	33	96	85	113	75	38
Point 4 - Three Cooks, Merrywalks	45	70	88	114	84	80	54	52
Point 5 - Robert Smith (solicitors), Lansdown	46	53	28	30	35	32	17	8
Point 6 - Superdrug, High Street	123	143	175	157	127	40	136	58
Point 7 - Antics, High Street	97	91	116	65	50	72	50	35
Point 8 - Carphone Warehouse, Threadneedle Street	44	41	77	71	39	58	28	8
Point 9 - Adams, Union Street	114	119	150	109	127	78	72	53
Point 10 - Hamptons, London Road	53	39	49	32	55	57	61	42
Point 11 - The Lord John, Russell Street	41	59	60	39	41	58	35	25
Point 12 - Halifax, Kendrick Street	62	86	122	72	99	99	73	40
Point 13 - YMCA, Kendrick Street	75	105	140	60	69	70	97	44
Point 14 - Sue Ryder, George Street	45	96	100	73	82	57	55	49
Point 15 - Peter James, Gloucester Street	9	25	33	30	41	31	32	26
Point 16 - Tattoo Parlour, Nelson Street	27	37	44	35	31	27	25	15

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**AVERAGE DAILY COMPARISONS WITH PREVIOUS YEARS, 2001 TO 2004**

- 2.7 In order to enable a comparison with counts from 2001 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 Stroud in 2001, 2002, 2003 and 2004 aggregated at each site for the three non-market days.
- 2.8 As Table 2.6 shows, there has been a pattern of decline in terms of total flows since 2001. The 2004 counts indicate a decline of some 74,904 (26.1%) since 2001 and a 15.8% decline on the previous year. This decrease is particularly acute at Point 9 on Union Street (31.3% decline in comparison to 2003), Point 12 on Kendrick Street (29.6% decline in comparison to 2003) and Point 4 in the Merrywalks Centre (27.9% decline in comparison to 2003).
- 2.9 Point 7 on High Street and Point 15 on Gloucester Street have, however, seen a rise in total daily flows, up 26.8% and 24.8% on 2003, respectively.

**Table 2.6 - Total Pedestrian Flows: Stroud 2001 to 2004**

	2001	2002	2003	2004	%change 2004v2001	%change 2004v2002	%change 2004v2003
Point 1 - Barclays Bank, King Street	29268	25236	28608	24372	-16.7	-3.4	-14.8
Point 2 - Woolworths, King Street	29676	28992	21408	19560	-34.1	-32.5	-8.6
Point 3 - Abbey National, Merrywalks	16764	16656	17448	14376	-14.2	-13.7	-17.6
Point 4 - Three Cooks, Merrywalks	21972	19380	20082	14484	-34.1	-25.3	-27.9
Point 5 - Robert Smith (solicitors), Lansdown	10248	9204	9192	9252	-9.7	0.5	0.7
Point 6 - Superdrug, High Street	35112	27792	30780	24324	-30.7	-12.5	-21.0
Point 7 - Antics, High Street	15756	13872	11256	14268	-9.4	2.9	26.8
Point 8 - Carphone Warehouse, Threadneedle Street	10500	11568	7872	7296	-30.5	-36.9	-7.3
Point 9 - Adams, Union Street	12816	11352	12000	8268	-35.5	-27.2	-31.1
Point 10 - Hamptons, London Road	11100	8460	10884	10548	-5.0	24.7	-3.1
Point 11 - The Lord John, Russell Street	14064	10092	13812	11028	-21.6	9.3	-20.2
Point 12 - Halifax, Kendrick Street	18816	16128	19356	13620	-27.6	-15.6	-29.6
Point 13 - YMCA, Kendrick Street	21036	16908	18924	13908	-33.9	-17.7	-26.5
Point 14 - Sue Ryder, George Street	18924	14208	18252	13692	-27.6	-3.6	-25.0
Point 15 - Peter James, Gloucester Street	9132	5556	5124	6396	-30.0	15.1	24.8
Point 16 - Tattoo Parlour, Nelson Street	11364	4500	6372	6252	-45.0	38.9	-1.9
<b>TOTAL FOOTFALL</b>	<b>286,548</b>	<b>239,904</b>	<b>251,370</b>	<b>211,644</b>	<b>-26.1</b>	<b>-11.8</b>	<b>-15.8</b>

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### AVERAGE FLOWS PER MINUTE

- 2.10 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:

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

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

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

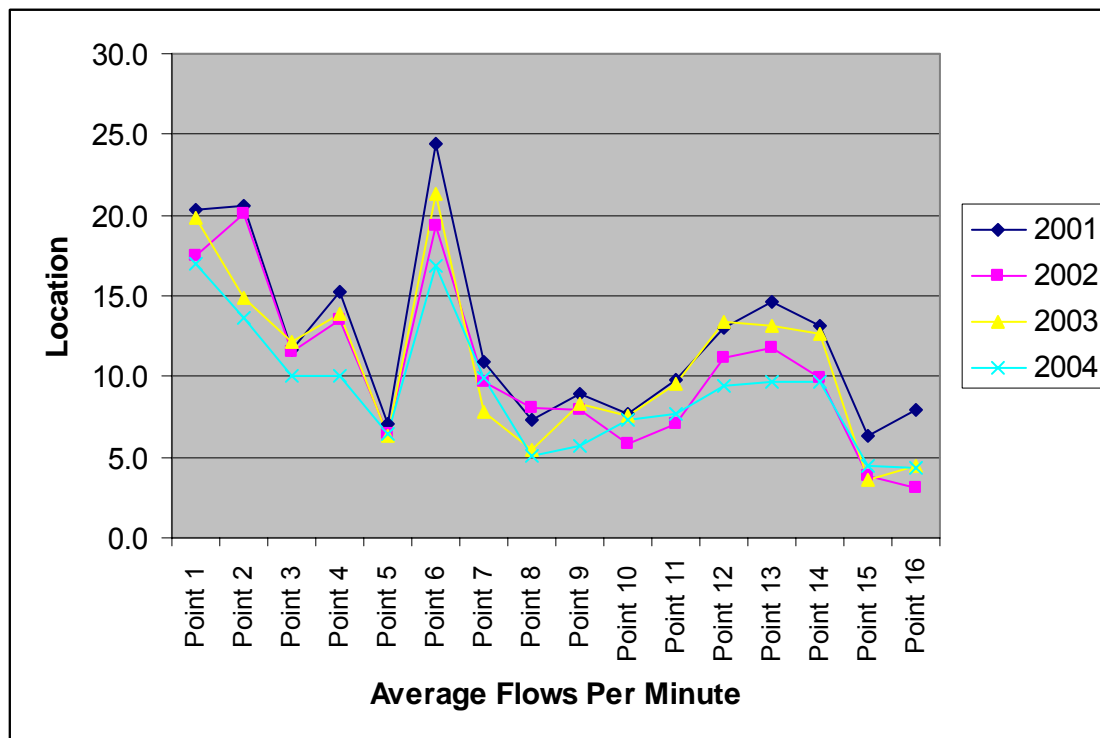
$$7.5 \text{ (hourly flow) divided by } 60 = 0.1 \text{ people per minute}$$

- 2.11 Based on the above formula, the average flows per minute at each point in Berkeley are as follows:

◆ Point 1 - Barclays Bank, King Street	16.9
◆ Point 2 - Woolworths, King Street	13.6
◆ Point 3 - Abbey National, Merrywalks	10.0
◆ Point 4 - Three Cooks, Merrywalks	10.1
◆ Point 5 - Robert Smith (Solicitors), Lansdown	6.4
◆ Point 6 - Superdrug, High Street	16.9
◆ Point 7- Antics, High Street	9.9
◆ Point 8 - Carphone Warehouse, Threadneedle Street	5.1
◆ Point 9 - Adams, Union Street	5.7
◆ Point 10 - Hamptons, London Road	7.3
◆ Point 11 - The Lord John, Russell Street	7.7
◆ Point 12 - Halifax, Kendrick Street	9.5
◆ Point 13 - YMCA, Kendrick Street	9.7
◆ Point 14 - Sue Ryder, George Street	9.7
◆ Point 15 - Peter James, Gloucester Street	4.4
◆ Point 16 - Tattoo Parlour, Nelson Street	4.3

- 2.12 Comparisons with previous years are shown in Figure 2.2 overleaf.

**Figure 2.2 – Average Flows Per Minute in Stroud 2001 to 2004**



2.13 Average flows per minute in 2004 remain comparatively less than previous years, although a similar pattern is shown between points.

**FOOTFALL BANDS**

2.14 Footfall bands relate to the total aggregate pedestrian flows over the three non-market days, categorising each count point into the relevant band for its flow.

**Table 2.7 – Footfall Bands Comparison 2002-2004**

Band	Footfall	Sites: 2002	Sites: 2003	Sites: 2004
<b>A</b>	over 25,000	1, 2, 6	1, 6	
<b>B</b>	15,000 – 25,000	3, 4, 12, 13	2, 3, 4, 12, 13, 14	1, 2, 6
<b>C</b>	under 15,000	5, 7, 8, 9, 10, 11, 14, 15, 16	5, 7, 8, 9, 10, 11, 15, 16	3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16

2.15 Whereas three counting points had pedestrian activity at over 25,000 movements in 2002, there are now no sites that fall into this category (although Points 1 and 6 came close at approximately 24,300 each). There are now 13 counting sites in the under 15,000 category compared to nine in 2002 and eight in 2003. This represents an overall decline in total flow, yet it is interesting to note that points 1, 2 and 6 have experienced the highest flow in each of the survey years.

## SITE RANKING

2.16 Table 2.8 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. Point 1 on King Street is now ranked as the busiest site, changing places with Point 6 on High Street. Nelson Street is, again, ranked as the least busy site, as it was in 2002. Point 9 on Union Street is now ranked as the thirteenth busiest site, down three places from tenth last year (2003).

**Table 2.8 - Relative Change in Ranking: Stroud 2003/2004**

	2002 Rank	2003 Rank	2004 Rank	Movement
Point 1 - Barclays Bank, King Street	3	2	1	Up
Point 2 - Woolworths, King Street	1	3	3	Same
Point 3 - Abbey National, Merrywalks	6	8	5	Up
Point 4 - Three Cooks, Merrywalks	4	4	4	Same
Point 5 - Robert Smith (solicitors), Lansdown	13	13	12	Up
Point 6 - Superdrug, High Street	2	1	2	Down
Point 7 - Antics, High Street	9	11	6	Up
Point 8 - Carphone Warehouse, Threadneedle Street	10	14	14	Same
Point 9 - Adams, Union Street	11	10	13	Down
Point 10 - Hamptons, London Road	14	12	11	Up
Point 11 - The Lord John, Russell Street	12	9	10	Down
Point 12 - Halifax, Kendrick Street	7	5	9	Down
Point 13 - YMCA, Kendrick Street	5	6	8	Down
Point 14 - Sue Ryder, George Street	8	7	7	Same
Point 15 - Peter James, Gloucester Street	15	16	15	Up
Point 16 - Tattoo Parlour, Nelson Street	16	15	16	Down

## DAILY FLOWS

2.17 Table 2.9 shows daily flows for the three non-market survey days and Table 2.10 provides a comparison of daily flows from previous years.

**Table 2.9 – Daily Flows Stroud 2004**

	Friday 15.10.04		Saturday 23.10.04		Tuesday 19.10.04	
	Total	Rank	Total	Rank	Total	Rank
Point 1 - Barclays Bank, King Street	7848	2	9732	1	6792	1
Point 2 - Woolworths, King Street	6828	3	6900	4	5832	3
Point 3 - Abbey National, Merrywalks	4380	7	6480	3	3516	7
Point 4 - Three Cooks, Merrywalks	4092	8	6180	5=	4212	4
Point 5 - Robert Smith (solicitors), Lansdown	2316	14=	3684	12	3252	8
Point 6 - Superdrug, High Street	8316	1	9312	2	6696	2
Point 7 - Antics, High Street	6144	4	5196	8	2928	10
Point 8 - Carphone Warehouse, Threadneedle Street	2448	13	2904	14	1944	14
Point 9 - Adams, Union Street	2604	12	3564	13	2100	13
Point 10 - Hamptons, London Road	3336	11	4548	11	2664	11
Point 11 - The Lord John, Russell Street	3552	9	4824	10	2652	12
Point 12 - Halifax, Kendrick Street	4956	6	5112	9	3552	6
Point 13 - YMCA, Kendrick Street	3660	10	6180	5=	4068	5
Point 14 - Sue Ryder, George Street	5064	5	5400	7	3228	9
Point 15 - Peter James, Gloucester Street	2304	16	2712	15	1380	15
Point 16 - Tattoo Parlour, Nelson Street	2316	14=	2652	16	1284	16
<b>TOTAL FLOWS</b>	70164		85380		56100	

**Table 2.10 – Total Daily Flow Comparisons: 2002-2004.**

	2002	2003	2004	%change 2004v2002	%change 2004v2003
Tuesday	46356	63852	56100	21.0	-12.1
Friday	86400	79356	70164	-18.8	-11.6
Saturday	107148	108108	85380	-20.3	-21.0

- 2.18 There are some minor variations in terms of daily flows and related ranking, although little significant variation (Table 2.9). When compared to previous years, all total daily flows are down, with the exception of this year's Tuesday count, which is up 21% on 2002. Figures are down 21% on Saturday in comparison to 2003, although poor weather is likely to have had an effect.

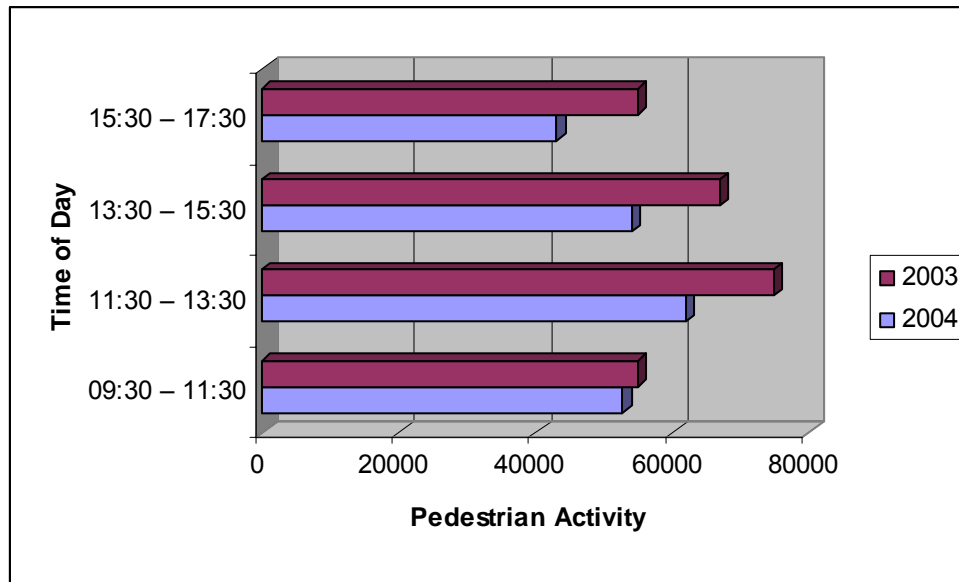
## TIME OF DAY ANALYSIS

2.19 Table 2.11 shows the time of day variations for Stroud and Fig 2.3 provides a time of day comparison with 2003.

**Table 2.11 - Time of Day: Stroud by Site 2004**

Point	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
1	4968	20.4	7932	32.5	6516	26.7	4956	20.3
2	4704	24.0	5364	27.4	5352	27.4	4140	21.2
3	3696	25.7	4272	29.7	3588	25.0	2820	19.6
4	3144	21.7	4500	31.1	3612	24.9	3228	22.3
5	2244	24.3	2724	29.4	2628	28.4	1656	17.9
6	6504	26.7	6504	26.7	6396	26.3	4920	20.2
7	3240	22.7	4620	32.4	3312	23.2	3096	21.7
8	1884	25.8	2292	31.4	1752	24.0	1368	18.8
9	2172	26.3	2412	29.2	2004	24.2	1680	20.3
10	3252	30.8	2580	24.5	2628	24.9	2088	19.8
11	2520	22.9	3012	27.3	3144	28.5	2352	21.3
12	3936	28.9	3840	28.2	3120	22.9	2724	20.0
13	3480	25.0	4440	31.9	3600	25.9	2388	17.2
14	4140	29.7	4200	30.1	3048	21.8	2304	16.5
15	1692	26.5	1620	25.3	1572	24.6	1512	23.6
16	1092	17.5	1524	24.4	1752	28.0	1884	30.1
<b>TOT</b>	<b>52668</b>	<b>24.9</b>	<b>61836</b>	<b>29.2</b>	<b>54024</b>	<b>25.5</b>	<b>43116</b>	<b>20.3</b>

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



- 2.20 The busiest time of day for both years on average has been between 11.30 and 13.30. In 2004 29.2% of activity across all counting points was accounted for within this period. In total 54.1% of total movements are accounted for during the morning period (to 13.30).

#### MARKET DAY ANALYSIS

- 2.21 This section of the report provides a comparison of the “market day” statistics from Saturday 16<sup>h</sup> October 2004, both with those from the ‘non-market’ Saturday – 23<sup>rd</sup> October 2004, as well as the previous two years’ market days: Saturday 18<sup>th</sup> October 2003 and Saturday 19<sup>th</sup> October 2002.

**Table 2.12 - Market Day Analysis and Comparison: Stroud 2002-2004**

Point	Market Day 16.10.04		Non Market 23.10.04		% Change (mkt:no nmkt)	Market 18.10.02		% Change (m04:m 02)	Market 19.10.03		% Change (m04:m 03)
	Total	Rank	Total	Rank		Total	Rank		Total	Rank	
1	11184	2	9732	1	14.9	11436	3	-2.2	15216	2	-26.5
2	9432	4	6900	4	36.7	7020	9	34.4	12288	3	-23.2
3	6972	8	6480	3	7.6	7704	6	-9.5	7716	6	-9.6
4	7044	7	6180	5=	14.0	7428	8	-5.2	7380	7	-4.6
5	2988	14	3684	12	-18.9	3432	14	-12.9	2472	16	20.9
6	11508	1	9312	2	23.6	14388	1	-20.0	15984	1	-28.0
7	6912	9	5196	8	33.0	5184	11	33.3	6144	10	12.5
8	4392	12	2904	14	51.2	3684	13	19.2	4968	11	-11.6
9	9864	3	3564	13	176.8	11616	2	-15.1	11820	4	-16.5
10	4656	11	4548	11	2.4	4212	12	10.5	3732	13	24.8
11	4296	13	4824	10	-10.9	5340	10	-19.6	4848	12	-11.4
12	7836	6	5112	9	53.3	8952	5	-12.5	7080	9	10.7
13	7920	5	6180	5=	28.2	9276	4	-14.6	8376	5	-5.4
14	6684	10	5400	7	23.8	7464	7	-10.5	7284	8	-8.2
15	2724	16	2712	15	0.4	3312	15	-17.8	2604	14	4.6
16	2892	15	2652	16	9.0	2808	16	3.0	2556	15	13.1
<b>Total</b>	<b>107,304</b>		<b>85,380</b>		<b>25.7</b>	<b>113,256</b>		<b>-5.3</b>	<b>120,468</b>		<b>-10.9</b>

- 2.22 Recordings for 2004 show that the market remains as having an impact on shopper numbers in Stroud, with a 25.7% increase in footfall on market Saturdays. It should, however, be noted that there were poor weather conditions on Saturday 23<sup>rd</sup> October, which will inevitably have had an impact on statistics. The impact of the market does, however, continue to appear to be diminishing, with total footfall in 2004 decreasing by 5.3% from market Saturday in 2003 and 10.9% compared to the market Saturday in 2002. This particularly marked at Point 9 where main market activities are carried out - despite a 176.8% increase on the non market Saturday in 2004, there have been decreases of 15.1% and 16.5% in the same location compared with the market Saturdays in 2003 and 2002, respectively.
- 2.23 Market day analysis by time of day for 2004 is shown in Table 2.13.

**Table 2.13 - Market Day Analysis by Time of Day 2004**

Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
1	2820	25.2	2532	22.6	3456	30.9	2376	21.2
2	2016	21.4	2892	30.7	2928	31.0	1596	16.9
3	1692	24.3	1548	22.2	2376	34.1	1356	19.4
4	1380	19.6	2424	34.4	1968	27.9	1272	18.1
5	1188	39.8	696	23.3	804	26.9	300	10.0
6	3192	27.7	3984	34.6	2004	17.4	2328	20.2
7	2256	32.6	2172	31.4	1464	21.2	1020	14.8
8	1020	23.2	1776	40.4	1164	26.5	432	9.8
9	2796	28.3	3108	31.5	2460	24.9	1500	15.2
10	1104	23.7	972	20.9	1344	28.9	1236	26.5
11	1200	27.9	1188	27.7	1188	27.7	720	16.8
12	1776	22.7	2328	29.7	2376	30.3	1356	17.3
13	2160	27.3	2400	30.3	1668	21.1	1692	21.4
14	1692	25.3	2076	31.1	1668	25.0	1248	18.7
15	408	15.0	756	27.8	864	31.7	696	25.6
16	768	26.6	948	32.8	696	24.1	480	16.6
<b>TOT</b>	<b>27468</b>	<b>25.6</b>	<b>31800</b>	<b>29.6</b>	<b>28428</b>	<b>26.5</b>	<b>19608</b>	<b>18.3</b>

- 2.24 Table 2.13 reveals that the proportion of pedestrian flows throughout the day seem to be relatively unaffected by the market day, with the spread of flows being similar to the non-market trends, as illustrated in Table 2.11.

## 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 Stroud, 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.
- 3.6 The classes have been selected to provide a simplified and clearly spatial profile of general uses – Goad centre reports and mapping is available for Stroud and could be

manipulated to present comparative numbers and percentages in terms of retail composition over time. However, 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 Agents responded that Stroud is in need of more office space as demand is high. The demand for retail space in Stroud is relatively small, although vacancies do get some interest.

### **VACANCY IN STROUD**

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 Stroud. 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 represent 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: Stroud




Address	2003		2004	
	Ground Floor	First Floor	Ground Floor	First Floor
Adjacent to MSCP, Bath Street	✓	✓	✓	✓
Adjacent to Bus Station	✓	✓	✓	✓
1-2 George Street		✓		✓
3 George Street	✓		✓	
4 George Street	✓	✓	✓	✓
8 George Street		✓		✓
21 George Street	✓		✓	
23 George Street		✓		✓
5 Gloucester Street		✓		✓
7 Gloucester Street	✓	✓	*	✓
8 Gloucester Street		✓	*	✓
20 Gloucester Street		✓		✓
21 Gloucester Street	✓		*	
12 High Street		✓		✓
15 High Street	✓	✓	✓	✓
21 High Street	✓	✓	✓	✓
30 High Street	✓	✓	✓	✓
32 High Street	✓		✓	
58 High Street		✓		✓
68 High Street		✓		✓
4 John Street	✓		✓	
9 John Street	✓	✓	✓	*
26 Kendrick Street		✓		✓
28 Kendrick Street		✓		✓
30 Kendrick Street		✓		✓
32 Kendrick Street		✓		✓
34 Kendrick Street		✓		✓
36 Kendrick Street		✓		*
1 King Street		✓		✓
3 King Street	✓	✓	*	✓
6 King Street		✓		✓
27 King Street	✓	✓	*	*
29 King Street	✓	✓	*	*

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

Address	2003		2004	
	Ground Floor	First Floor	Ground Floor	First Floor
33 King Street	✓	✓	*	*
35 King Street	✓	✓	*	*
47 King Street		✓		*
1a London Road	✓	✓	*	*
1b London Road		✓		*
1c London Road		✓		✓
Corner Merrywalks and Gloucester Street	✓	✓	✓	✓
7 Merrywalks Shopping Centre	✓		*	
10 Merrywalks Shopping Centre	✓		✓	
11 Merrywalks Shopping Centre	✓	N/A	✓	N/A
16 Merrywalks Shopping Centre		✓		✓
17 Merrywalks Shopping Centre	✓	✓	✓	✓
18 Merrywalks Shopping Centre	✓	✓	✓	✓
19 Merrywalks Shopping Centre		✓		*
27 - 29 Merrywalks Shopping Centre			✓*	
20 Merrywalks Shopping Centre	✓	✓	✓	✓
35 Merrywalks Shopping Centre			✓*	
eastern portion of 1 Nelson Street		✓		✓
21 Nelson Street	✓	✓	✓	✓
25 Nelson Street		✓		✓
38 Nelson Street	✓	✓	*	*
1-2 Russell Street	✓	✓	✓	✓
4 Russell Street	✓	✓	✓	✓
5 Russell Street	✓		✓	
7a Russell Street	✓	✓	✓	✓
11-12 Russell Street		✓		*
17 Russell Street	✓	✓	✓	✓
18-19 Russell Street	✓	✓	✓	✓
21-23 Russell Street	✓		✓	
Station Road (above A&A taxis)				✓*
1 Swan Lane	✓	✓	✓	✓
2 Swan Lane	✓	✓	✓	✓
3 Threadneedle Street	✓	✓	✓	✓

Address	2003		2004	
	Ground Floor	First Floor	Ground Floor	First Floor
5 Threadneedle Street	√	√	√	√
7 Threadneedle Street		√		√
12 Threadneedle Street		√		√
3-5 Union Street	√		√	

\* Indicates a change in unit occupation

KEY:		Retail
		Business
		Residential/Other

**Table 3.2 – Vacancy By Type – Stroud 2003/2004**

Type	2003		2004		% Change 2004v2003
	No. of Units	%	No. of Units	%	
Retail	44	46	36	47	-18
Business	40	42	31	40	-23
Residential/Other	12	13	10	13	-17
<b>TOTAL</b>	<b>96</b>	<b>100</b>	<b>77</b>	<b>100</b>	<b>-20</b>

- 3.11 There has been an overall decrease in the amount of vacancy in Stroud, with 20 fewer vacant units in 2004 than 2003. There are now 36 vacant retail units in comparison to 44 in 2003 - notable changes have included a number of lettings on King Street including the extension of "Mackeys" and the opening of Shoezone; two new businesses on Gloucester Street – an opticians and takeaway; two new businesses in the Cornhill Shopping Centre on Union Street; and a new nightclub on London Road.
- 3.12 There are now 25% less business vacancies and 17% less residential/other vacancies than the previous year.
- 3.13 There are still certain areas of the town centre where vacancy is prolific, including Russell Street where there are a number of vacant retail units. The "Shunters" public house has become vacant; and the Merrywalks shopping centre now has seven vacant retail units.

**LAND USES****Table 3.3 – Land Uses: Stroud**

	<b>Ground Floor (GF)</b>	<b>% of GF units</b>	<b>Upper Floor (UF)</b>	<b>% of UF units</b>	<b>Total units</b>	<b>% of Total Units</b>
Convenience	7	2	4	1	11	2
Comparison	118	37	34	13	152	26
Food and entertainment	21	7	3	1	24	4
Residential	9	3	49	18	58	10
Offices	62	19	82	30	144	24
Service	72	22	54	20	126	21
Vacant	32	10	45	17	77	13
<b>TOTAL</b>	<b>321</b>	<b>100</b>	<b>271</b>	<b>100</b>	<b>592</b>	<b>100</b>

- 3.14 Stroud is a busy town offering a good range of services and facilities to the surrounding communities. Service, comparison retail and office facilities are reasonably evenly represented as a total of all units identified, representing 21%, 26% and 24% of the total, respectively. Convenience units represent only 2% of the total number of units, comprising a mid sized Somerfield store in the Merrywalks shopping centre, an Iceland on Union Street and a number of independent grocers, butchers, bakers and health food stores. Further convenience provision is made on a larger scale in the form of three supermarkets on the outskirts of the town – Waitrose; Tesco; and Sainsbury's – although these are sited outside the defined town centre boundary.

## **4. Findings**

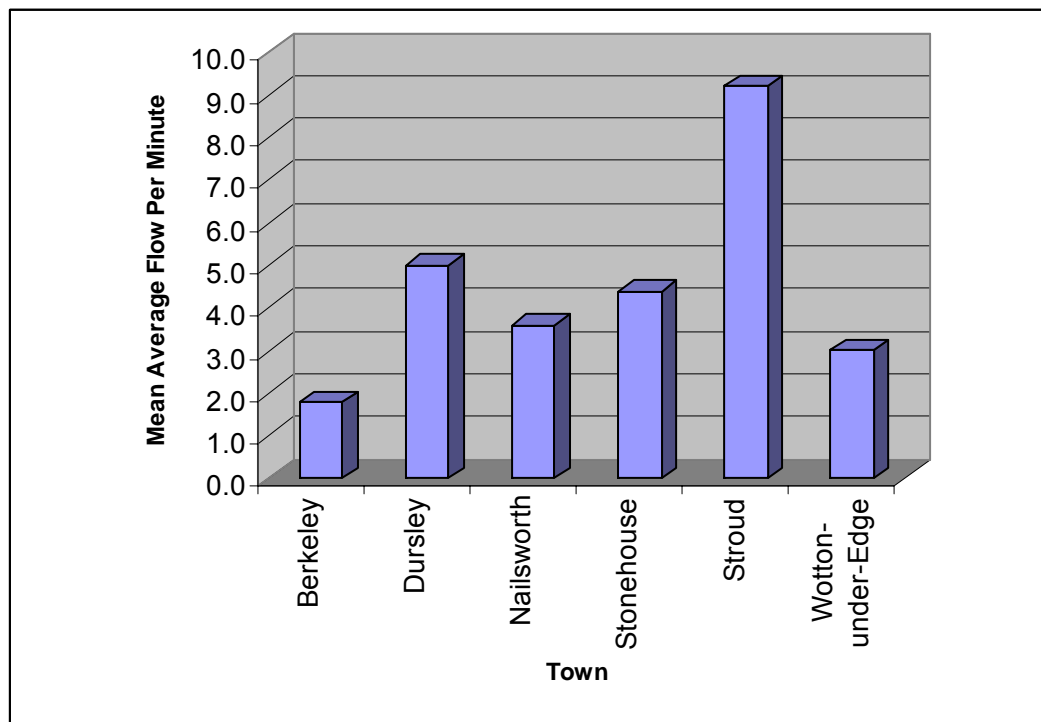
### **PEDESTRIAN FOOTFALL**

- 4.1 Average total flows across the three survey days have declined in Stroud since 2001 by 26.1%. A 15.8% decrease was noted in comparison to the 2003 results. The largest decrease occurred at Point 9 on Union Street where flows were 31.1% less than the previous year. Large decreases in pedestrian activity were also recorded on Kendrick Street and in the Merrywalks Shopping Centre.
- 4.2 Average flows per minute are highest on King Street and High Street, both having on average 16.9 pedestrian movements per minute. Flows per minute are, however, lower than the previous year's (2003) at each counting point. For the first time, in 2004 none of the 16 counting points had 25,000 or more movements across the three days, compared to three points in 2002. Flows of less than 15,000 were recorded at 13 of the counting points in 2004, compared with just eight in 2003.
- 4.3 Flows across the three days are down considerably on the previous year: Tuesday had 12.1% fewer pedestrian movements than 2003; pedestrian movements on Friday were down by 11.6% on 2003; and 21% fewer movements were recorded on the Saturday.
- 4.4 Although the Saturday market day count recorded on average 25.7% more pedestrian movements than the non-market Saturday, the result was 5.3% lower than the 2002 market day count and 10.9% lower than the 2003 market day count.

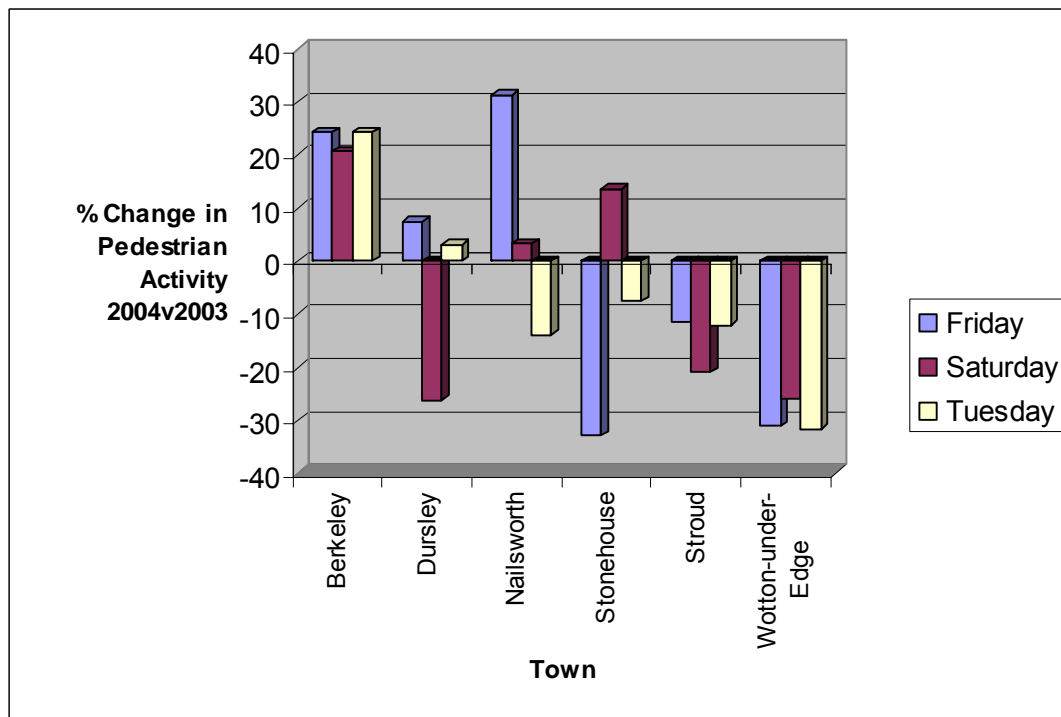
### **Comparison With Other Towns**

- 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 Being the largest centre, Stroud has considerably higher average footfall per minute than the other towns included within the study.

**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 over the three survey days between 2003 and 2004. The chart shows Stroud to be one of two towns included in the study that has seen decreases in pedestrian activity across all three non-market survey days. However, all except one town has seen a decrease in pedestrian patronage on at least one of the survey days - only Stroud and Wotton-under-Edge has seen continuous decreases.

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

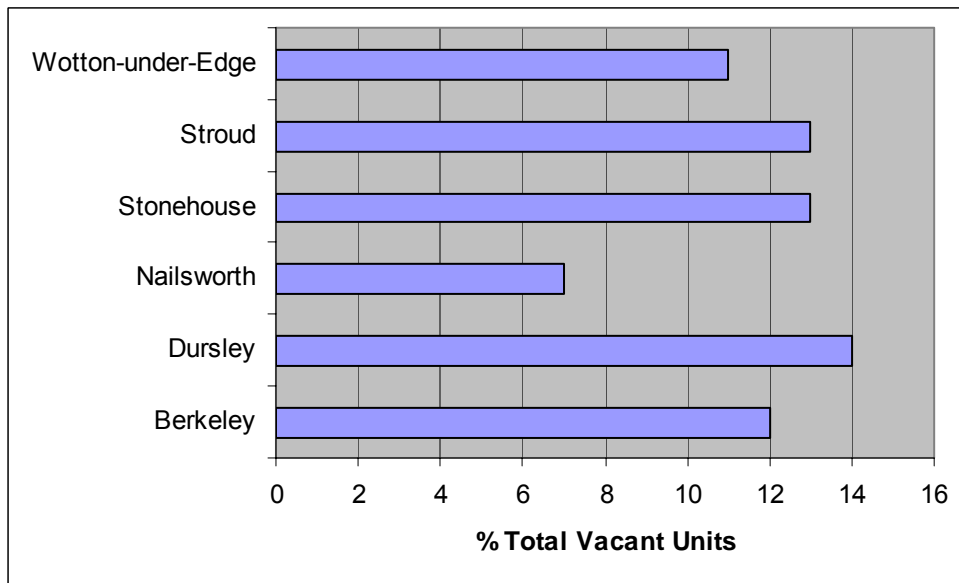
#### VACANCY AND LAND-USE

- 4.8 Conversations with commercial property agents have indicated that Stroud is in need of more office space as demand is high. It was also noted that although demand for retail space in Stroud is relatively small, vacancies do attract interest. This situation has been reflected by an improvement (i.e. a decrease) in levels of vacancy across the town. There are 20% fewer vacant units in 2004 than 2003 with decreases in all sectors: there are 18% fewer vacant retail units; 23% fewer vacant business units; and 17% fewer residential/other units.
- 4.9 A number of retail lettings have occurred over the past 12 months. These have been notable in Kings Street, Gloucester Street and Union Street. There are, however, still clusters of vacant units on Russell Street and in the Merrywalks centre.

#### Comparison With Other Towns

- 4.10 As Figure 4.3 indicates, Stroud still has a comparatively high proportion of vacant units within the town centre in comparison to other towns in the study area. Stroud has approximately 13% of its stock vacant – this is equal to Stonehouse and less than Dursley, but more than the remaining three 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. Stroud is the only town to see improvements across all sectors and has seen the second largest improvement in terms total vacancy after Nailsworth.

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

