



BEACON RESEARCH



Suite 3, The Resource Centre,
Bridge Street, Garstang,
Lancs. PR3 1YB

Tel: 01995 606330

Fax: 01995 605336

Email: gurth@beaconresearch.fsnet.co.uk

VAT Reg No: 712347851

Stroud District Market Towns Study

DURSLEY

Pedestrian Flow Counts / Land Use and Vacancy Assessment (October 2005)

Prepared for: Stroud District Council

Prepared by: Gurth Wilson / Adam Pyrke

Date: 26th October 2005

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1. INTRODUCTION / BACKGROUND

Beacon Research in association with Colliers CRE were commissioned by Stroud District Council 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 particular report provides the results and analysis of surveys undertaken within the central area of Dursley.

The assessments provide an update to surveys and analysis, carried out by Atkins, in 2004, as part of the Stroud District Market Towns Study.

1.1 PEDESTRIAN FLOW COUNTS

The pedestrian flow count survey methodology employs identical procedures to those used by Atkins' 2004 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 and at the same time of year, as counts undertaken since 1997 in Stroud and Dursley, since 2002 in Stonehouse and Nailsworth, and since 2003, in Wotton-under-Edge and Berkeley.

Section 2 of this document presents the following pedestrian flow count analysis for Dursley:

- ◆ Total flows at each counting point;
- ◆ Aggregated daily flows 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;
- ◆ Comparisons with the other five Market towns

1.2 LAND USE AND VACANCY ASSESSMENT

The land use and vacancy audit methodology uses a similar procedure to the 2004 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. This included a walkover site appraisal of the six town centres, to identify the land use, including vacancies, in each town centre at both the ground and the first floors.

It was further agreed that the procedure be enhanced by making a note of the actual occupiers at ground and first floor levels to provide a more detailed record of occupiers in the centre, capable of greater interrogation in the future by nature and type of occupier (e.g. independent or multiple trader; class A1, A2, A3, A4 or A5 use).

Section 3 of this document presents the results from this year's audit

General observations are included where they are considered worthy of note, including any trends consistent with the pedestrian flow counts.

2. PEDESTRIAN FLOW COUNT ANALYSIS

2.1 METHODOLOGY

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

Table 2.1 - Number of Counting points, Count Duration and Date of Counts 2005

Town	No. of Counting Points	Length of Count (minutes)	Date of Counts
Stroud	16	5	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October
Berkeley	6	7	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October
Dursley	6	7	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October
Nailsworth	7	5	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October
Stonehouse	3	12	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October
Wotton-under-Edge	6	7	Friday 14 th October Saturday 15 th October Tuesday 18 th October Saturday 22 nd October

As indicated in Table 2.1, counts were undertaken in each of the centres on Friday 14th October, Saturday 15th October and Tuesday 18th October. Additional counts were undertaken on Saturday 22nd 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 5th November to take account of the market held on that day.

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 B**). 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.

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: road works, sporting events; and markets. Any comments made during the survey are included as footnotes to the relevant table.

Pedestrian flow counts were undertaken at each of six locations in Dursley Town Centre. The locations were exactly comparable to those used from 2001 – 2004, although some names have changed during this period.

In Dursley counts were taken for seven minutes in each hour, across the full width of the street or shopping mall in both directions.

The locations used for Dursley are illustrated in **Figure 2.1** and are identified as follows: -

Figure 2.1

1. Cobblers, Parsonage Street
2. Job Centre, Off Parsonage Street
3. Kings Head Inn, Parsonage Street
4. Bell Hotel, Long Street
5. The Vac Shop, Silver Street
6. Lions Club, May Lane

Day / Date

Weather

Friday, 14 th October	Dry / Cloudy / Quite cold
Saturday, 15 th October	Dry / Cloudy (am), Sunny / Warm (pm)
Tuesday, 18 th October	Drizzle / Cloudy / Cold
Saturday, 22 nd October	Sunny / Dry

Other Comments

Market Day – October 22nd 2005

NOTE:

The number of points used in each centre was specified in the Stroud District Council brief and was consistent with the numbers used in previous studies.

The length of the count at each location was dictated by the number of points used (i.e. fewer points = longer counts) and was consistent with previous years and the periods specified in the brief.

2.2 SUMMARY OF FINDINGS

Full details of the pedestrian counts for each enumeration day at all sites are shown in Appendix A. You should note that these have been grossed up to hourly equivalents in order to estimate the total pedestrian flows for each hour / day. The same is true of the 2004 figures.

In this section of the report we have attempted to summarise and simplify the results in order to assist your reading and interpretation.

Where appropriate, the results have been compared with those of 2004.

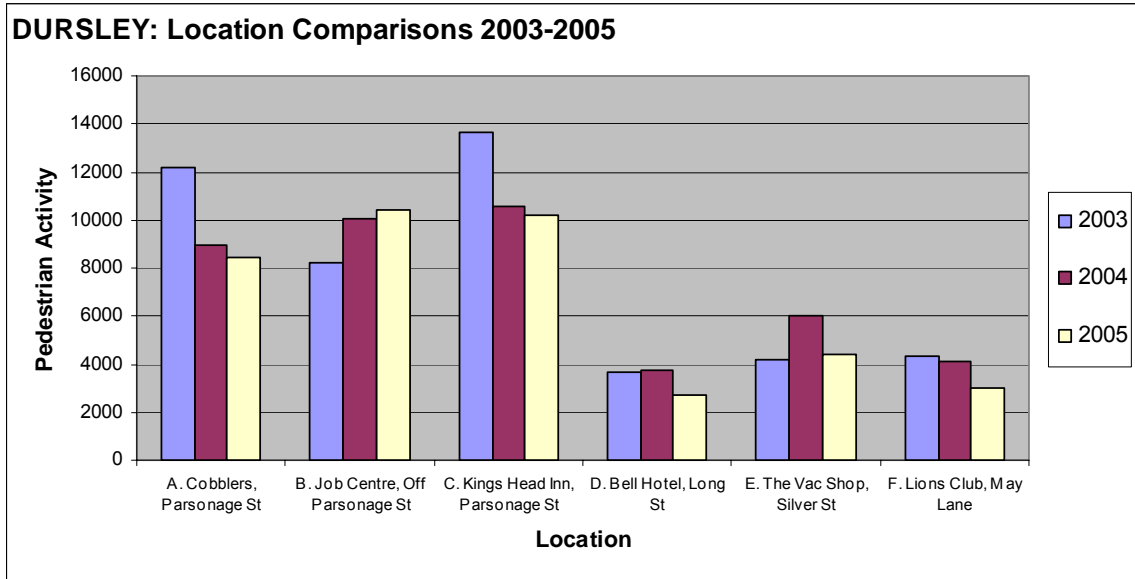
2.2.1 Total Flows

In Table 2.2.1, which follows, we have aggregated the pedestrian flows at each site for the three days and compared these figures with those of the previous four years (2001-2004). The final column shows the percentage change in pedestrian flows at each site when comparing the 2005 and 2004 survey results.

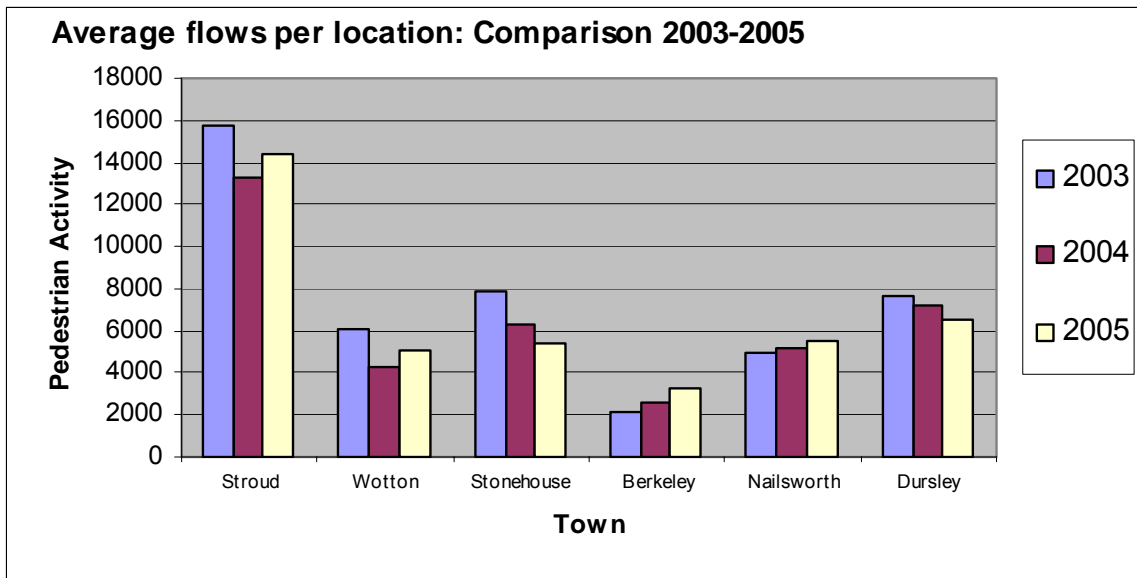
Table 2.2.1 – Total Pedestrian Flows

Location	Total 2001	Total 2002	Total 2003	Total 2004	Total 2005	% Change 2004-05
1. Cobblers, Parsonage Street	13,362	8,407	12,212	8,956	8,451	-5.6
2. Job Centre, Off Parsonage Street	15,160	8,116	8,219	10,027	10,423	+3.9
3. Kings Head Inn, Parsonage Street	14,243	8,476	13,635	10,541	10,226	-3.0
4. Bell Hotel, Long Street	3,231	5,773	3,634	3,728	2,717	-27.1
5. The Vac Shop, Silver Street	6,093	6,496	4,191	5,999	4,380	-27.0
6. Lions Club, May Lane	5,279	6,299	4,345	4,128	3,043	-26.3
Total – All Sites	57,368	43,527	46,236	43,379	39,240	-9.7

The total footfall across all the sites in the Town Centre is down 9.7 % on last year, continuing the trend of the past two years. The gap continues to grow between the busiest and quietest sites. The Job Centre site, which is currently the busiest, is almost four times as busy as the Bell hotel site. Whilst the total flows at the sites in Long Street, Silver street and May Lane all declined by 26-27% compared to last year, the flow at the Job Centre site actually increased by 4%, continuing the improvement shown in 2004.



The average flow across all sites for the three days was 6540, higher than the figures recorded in any other centre apart from Stroud.



2.2.2 Site Ranking

To give an idea of the way in which the overall dynamics of the Centre may have changed, we show the 'Ranking' by location for each year in Table 2.2.2, and once again compare the 2005 and 2004 results.

Table 2.2.2 – Ranking

Location	2003	2004	2005	Move-ment 2004-05
1. Cobblers, Parsonage Street	2	3	3	Same
2. Job Centre, Off Parsonage Street	3	2	1	Up
3. Kings Head Inn, Parsonage Street	1	1	2	Down
4. Bell Hotel, Long Street	6	6	6	Same
5. The Vac Shop, Silver Street	5	4	4	Same
6. Lions Club, May Lane	4	5	5	Same

The relative order of the sites remains almost identical to last year, although the Job Centre, off Parsonage Street, has reclaimed the title of busiest site.

The gap between the three busiest sites and the quieter sites has been increasing quite steadily since 2002. This year, the quieter sites all show falls in pedestrian flows, which are well above average. As a result the Job Centre site is almost four times as busy as the Bell Hotel site.

The footfall bands remain similar to last year, and are shown in Table 2.2.3, which follows.

Footfall Bands

BAND A: Over 10,000 BAND B: 5,000 – 10,000 BAND C: Under 5,000

Table 2.2.3 – Footfall Bands

Location	2005 Band
1. Cobblers, Parsonage Street	B
2. Job Centre, Off Parsonage Street	A
3. Kings Head Inn, Parsonage Street	A
4. Bell Hotel, Long Street	C
5. The Vac Shop, Silver Street	C
6. Lions Club, May Lane	C

The number of sites in the lowest band has increased this year, with three sites recording a footfall below 5,000 per week. Total flows vary between 10,423 (Job Centre) and 2,717 (Bell Hotel).

2.2.3 Daily Flows

Looking at the total flows (all sites) for the three days, compared to last year, produces the following picture.

Location	2004	2005	% Change
Friday, 14 th October	16673	13723	-17.7
Saturday, 15 th October	12375	13423	+8.5
Tuesday, 18 th October	14295	12094	-15.5
TOTAL	43433	39240	-9.7

Total flows on Saturday were up 8.5%, reversing the decline (26%) of last year, but both Tuesday and Friday recorded declines in excess of 15% compared to last year.

Overall the total flows across all three days were down 9.7% compared to a fall of 6.1% last year.

Friday and Saturday currently account for 69.2% of the total footfall compared to 66.9% a year ago.

2.2.4 Time of Day Analysis

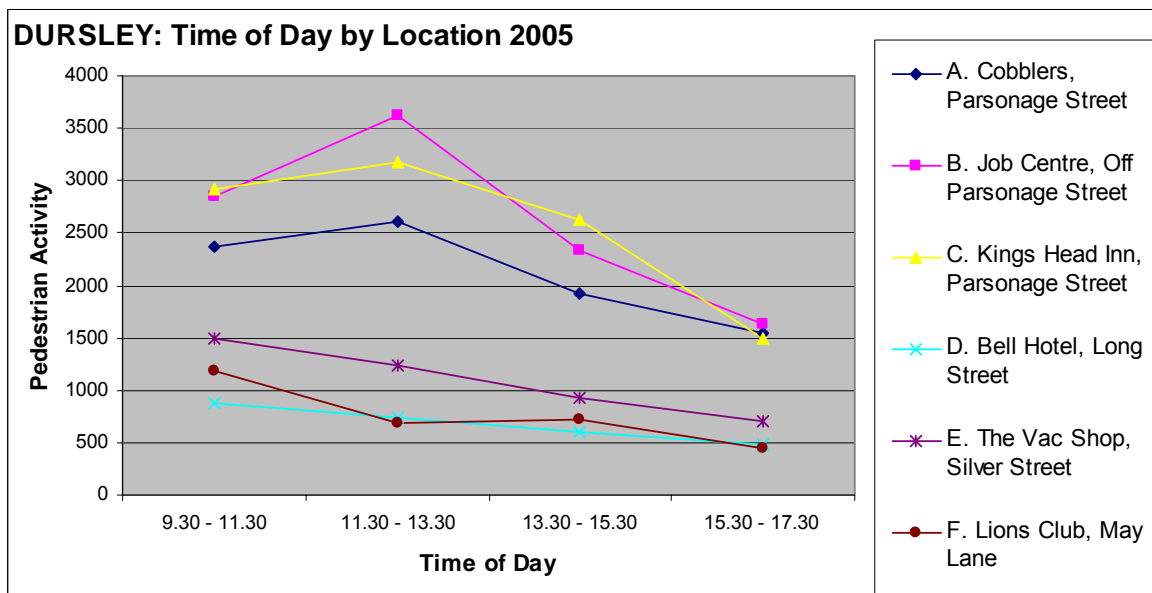
Similarly, we can look at the variation in pedestrian flows at different times of day for the total enumeration period.

Table 2.2.4 – Time of Day

Location	9.30 - 11.30	%	11.30 - 13.30	%	13.30 - 15.30	%	15.30 - 17.30	%
1.Cobblers, Parsonage Street	2374	28.1	2614	30.9	1920	22.7	1543	18.3
2.Job Centre, Off Parsonage Street	2846	27.3	3617	34.7	2331	22.4	1629	15.6
3.Kings Head Inn, Parsonage Street	2923	28.6	3180	31.1	2631	25.7	1491	14.6
4.Bell Hotel, Long Street	883	32.5	737	27.1	609	22.4	489	18.0
5.The Vac Shop, Silver Street	1500	34.2	1234	28.2	934	21.3	711	16.2
6.Lions Club, May Lane	1183	38.9	686	22.5	720	23.7	454	14.9
Total – All Sites	11709	29.8	12069	30.8	9146	23.3	6317	16.1

Overall 30.8% of the total flow occurs between 11.30 am and 1.30 pm, whilst only 16.1% occurs after 15.30 am. The total flows between 11.30 and 15.30 have increased in importance and currently account for 54.1% of the total.

The Parsonage Street sites are particularly busy between 11.30am and 1.30pm, whilst all the other sites are busier early on and then fall away.



2.2.5 Market Day Analysis

This section of the report provides a comparison of the “market day” statistics from Saturday 22nd October 2005, both with those from the ‘non-market’ Saturday – 15th October 2005, as well as the previous two years’ market days: Saturday 23rd October 2004 and Saturday 19th October 2002.

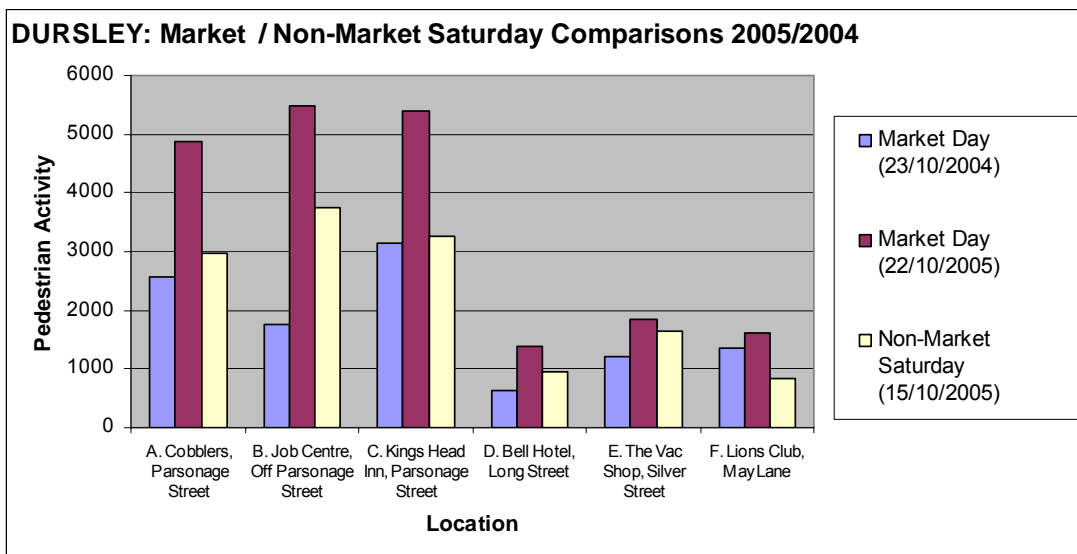
Table 2.2.5 - Market Day Analysis and Comparison: Dursley

	22:10:05		15:10:05		% change	23:10:04		% change	25:10:03		% change
	Market Day		Non Market			Market Day			Market Day		
	Total	Rank	Total	Rank		Total	Rank		Total	Rank	
1	4869	3	2974	3	63.7	2571	2	89.4	5039	1	-3.4
2	5477	1	3754	1	45.9	1765	3	210.3	3214	3	70.4
3	5383	2	3274	2	64.4	3145	1	71.2	4988	2	7.9
4	1380	6	951	5	45.0	643	6	114.6	754	6	83.0
5	1834	4	1646	4	11.5	1200	5	52.9	1594	4	15.1
6	1603	5	823	6	94.8	1363	4	17.6	1243	5	29.0
Total	20546		13422		53.1	10687		92.2	16832		22.1

Market day this year was the busiest since 2002. Total flows were up 53.1% on the previous “Non Market” Saturday and over 92% ahead of the similar Market day in 2004. Admittedly, the figures for last year do look very low.

The flows at the Lions Club site showed a particularly sharp increase on market day (95%) although they are only 17.6% ahead of the same day last year. In contrast, the flows at the Job Centre site increased by 46% on market day.

The figures are more consistent with the increased performance of the town on market day, and are in contrast to the results from 2004. Admittedly, the weather was much better this year compared to last year, when it was also reported that there were fewer stallholders.



2.3 CONCLUSIONS

- 2.3.1** The weather during the period of these counts was a considerable improvement on last year, being mainly dry and mild. The weather on market day was significantly better than last year, when it rained.
- 2.3.2** Total flows across all sites for the three days were down 9.7% on last year, continuing the trend we have seen for the past two years. Changes in flows varied between a decline of 27% at Long Street, to an increase of 4% at the Job Centre site.
- 2.3.3** The average flow across all sites for the three days was 6,540 varying between 10,423 (Job Centre) and 2,717 (Bell Hotel).
- 2.3.4** The dynamics of the town centre and the relative importance of the different sites show very little change since 2004, although the quieter sites have all declined at a larger rate than average. As a result, the Job Centre site is now almost four times as busy as the Bell Hotel site. This disparity is, however, not as large as we have seen in other centres.
- 2.3.5** Total flows on Saturday were up by 8.5% compared to 2004, although the flows on both Tuesday and Friday showed significant declines (15-18%). Friday continues to be the busiest day and Friday/Saturday account for 69% of the total flows across the three days.
- 2.3.6** Overall, almost 31% of total flows occur between 11.30am and 1.30pm, whilst only 16.1% occurs after 3.30pm. The Parsonage Street sites are particularly busy between 11.30am and 1.30pm.
- 2.3.7** Market day (October 22nd) was the busiest since 2002. Total flows were 53% higher than the previous Saturday, and over 92% ahead of a similar market day in 2004.

Whilst the comparatively mild and sunny weather was a contributory factor, these are more like the results we would be expecting.

The flows at the Lions Club site showed a particularly sharp increase in footfall between the market and non-market days.

3. LAND USE AND VACANT PREMISES AUDIT AND ANALYSIS

3.1 METHODOLOGY

The objective of the Land Use Survey was to record uses at ground and first floor levels. The 2005 assessment differs from previous assessments in that it provides a record of actual occupiers in addition to a record of the type of use in the different premises.

It also adopted updated town centre boundaries which were based upon those within the emerging Stroud District Local Plan which it is intended will be adopted in January 2006. These boundaries were selected as the plan process has reached an advanced stage and they are not likely to change any further.

The survey process comprised two main elements: -

- i) Walk over surveys of each centre recording occupiers and land uses;
- ii) Desk based research to clarify any remaining areas of uncertainty.

An initial scoping study was undertaken on 5 October 2005. This comprised a visit to each town centre and the compiling of a schedule of occupiers. Subsequently on 19 and 20 October 2005, the full walk over surveys were undertaken, confirming the earlier results and including a more detailed cross check of uses at first floor level. Whilst occupiers at ground floor level were generally self-evident, this was not always the case at first floor level. Consequently where there was uncertainty, the nature of the first floor occupation was checked with the occupier of the ground floor property. Where properties were vacant, the use of the accommodation is based upon the use described in the sales/letting boards or, where that was unclear, through verbal confirmation with the appropriate agent.

Traders plans for each centre were also drawn up during the full walk over surveys. For Stroud this involved updating the Experian Goad Traders Plan, whilst plans were prepared for the other centres based upon GIS information supplied by the Council.

3.2 PRESENTATION OF THE RESULTS

Our findings are presented in three ways: -

i) A Schedule of Uses at ground and first floor by property within the defined town centres.

These Schedules also identify the Use Class of the ground floor accommodation. A similar exercise has not been undertaken for the first floor as it is not always possible to distinguish between say, an independent residential use and an ancillary residential use over the shop. Accordingly the Use Class assessment relates solely to ground floor premises. The schedules are enclosed at Appendix C.

We have adopted the land use categories set down in the latest revision of the Use Classes Order (i.e. April 2005) but for the purposes of clarity confirm that the respective classes are as follows:

- A1 – Shop
- A2 – Financial and Professional Services
- A3 – Restaurants and Cafes
- A4 – Drinking Establishments
- A5 – Hot Food Takeaway
- B1 – Offices and Light Industrial
- C1 – Residential Institutions
- C3 – Dwelling Houses
- D1 - Non Residential Institutions
- D2 - Assembly and Leisure
- Sui Generis (Sg) – Uses not falling within a Use Class

For clarity we confirm that the following uses have been allocated as follows:

- Beauty Salons and tanning shops – A2
- Job Centres – B1
- Council Offices (ie District, Town and Parish) – B1
- Private Clubs (eg Conservative Club) – Sui Generis

ii) Plans showing ground floor occupiers by name.

We were supplied with the map bases by Stroud District Council and have identified the occupiers thereon. The Plan for Dursley is shown on page 14.

iii) Colour coded land use maps.

Again utilising the map bases provided by Stroud District Council, we have identified the different uses in accordance with categories identified by Stroud District Council as follows:

- Convenience: encompassing supermarkets, grocers, butchers, bakers and newsagents;
- Comparison: non-food goods such as clothes, gifts, electrical goods etc;
- Food and Entertainment; including takeaways, restaurants, cafes, bars, nightclubs, amusement arcades, snooker clubs and private clubs;
- Residential: dwelling houses including flats over shops;
- Offices: general office uses including solicitors, together with the high street offices of financial advisers, estate agents, travel agents and employment agents;
- Service: including schools, community centres, places of worship, banks, hairdressers, beauticians, tanning shops, health centres, alternative therapy centres, internet shops, libraries, undertakers, taxi and post offices;
- Vacant: empty, disused or derelict, and units under construction.

These categories cross Use Classes and are comparable with the definitions used in previous studies.

Vacant property is further sub-divided into three sub-categories to provide further analysis and provide a further basis for comparison with historic data. The sub-categories are:

- Retail;
- Business;
- Residential and Other.

The Plans for both ground and first floor are shown on pages 21 and 22.

3.3 ANALYSIS

Dursley is relatively large centre with retail provision predominantly fronting the pedestrianised Parsonage Street and its continuation along Silver Street. There is in addition a small mixed grouping of shops and services fronting Long Street, and a range of services/business accommodation fronting May Lane. Castle Street allows through traffic to bypass Parsonage Street and to the north thereof a range of community facilities (including swimming pool, youth centre, fire station, education buildings and long-term car park) have been constructed.

Table 3.3.1 identifies the number of ground floor units according to Use Class categorisation. Just under half (48%) of units are Class A1 premises including convenience (i.e. the sale of food, drink and newspapers) and comparison (e.g. clothes, shoes, electricals, etc) goods together with a small range of personal services (e.g. travel agents, hairdressers etc) which also fall within this Use Class. There is also a good range of financial and professional outlets along the main shopping street with all four major banks represented. This category accounts for 10% of units.

Within the wider town centre, there is also an equal representation of dwelling houses and non-residential institutions (e.g. the Court Yard Clinic and Dursley Youth Centre) however these are in appropriate locations away from the main shopping areas. Food and drink outlets (i.e. Classes A3, A4 and A5) do not appear to be as fully represented as might be expected in a town of this size, with proportionally a relatively high level of drinking establishments within this group.

Table 3.3.1: Ground Floor Uses by Use Class

		Number	Percentage
A1	Shops	60	48
A2	Financial & Professional	13	10
A3	Restaurant & Cafes	1	1
A4	Drinking Establishments	4	3
A5	Hot Food Takeaways	3	2
B1	Business	13	10
C1	Hotels	0	0
C3	Dwelling Houses	12	9
D1	Non Residential Institutions	12	10
D2	Assembly & Leisure	1	1
Sui Generis	In a class of their own	7	6
Total		126	100

Table 3.3.2 lists the vacancies identified by the survey. These are 14 at ground floor level and 9 at first. They are predominantly situated outside or on the edge of the main shopping area (Parsonage Street/Silver Street) although there are four vacancies fronting onto Parsonage Street itself.

The vacant units represent a variety of uses including shops, job centre, dry cleaners, hot food takeaway, education buildings and estate agent. Also included is the library on May Lane which is currently under redevelopment which has reached a relatively advanced stage.

Table 3.3.2: Vacancies 2005

Address	Ground Floor		1 st Floor	
	Use	Classification	Use	Classification
May Lane	Library (Under construction)	Residential / other	Library	Residential / Other
11 May Lane	Office	Business	Office	Business
19 May Lane	-	-	Car Showroom	Residential / Other
19a Parsonage Street	Dry cleaners	Retail	-	-
28 Parsonage Street	Shop	Retail	Ancillary	Retail
31 Parsonage Street	Job centre	Business	Ancillary	Business
32 Parsonage Street	-	-	Residential	Residential / Other
47 Parsonage Street	-	-	Residential	Residential / Other
51 Parsonage Street	Shop	Retail	-	-
53 Parsonage Street	Shop	Retail	-	-
10 Silver Street	-	-	Ancillary Shop	Retail
26 Silver Street	-	-	Residential	Residential / Other
30 Silver Street	Shop	Retail	Residential	Residential / Other
31 Silver Street	Estate Agent	Business	-	-
32 Silver Street	Shop	Retail	-	-
Bristol House	Shop	Retail	-	-
40 Silver Street	Hot Food Takeaway	Residential / other	-	-
28 Long Street	Shop	Retail	-	-
Castle Street	Education	Residential /Other	-	-

Note: ‘-’ implies either a vacant unit or where we are unable to establish usage

Table 3.3.3 compares current vacancy numbers with 2003 and 2004. It shows a reduction in the overall numbers of vacancies, particularly in the 'business' and 'residential/other' categories, albeit a rise in the number of vacant retail outlets.

Table 3.3.3: Vacancy by Type 2003 – 2005

Classification	2003		2004		2005	
	Number	%	Number	%	Number	%
Retail	6	16	9	24	10	42
Business	15	39	11	30	5	21
Residential / Other	17	45	17	46	9	37
Total	38	100	37	100	24	100

Table 3.3.4 compares current vacancies with 2004 on a unit-by-unit basis. It reveals that some vacancies (a total of ten) have been vacant for at least a year, 20 have become occupied and 20 properties have newly become vacant.

Table 3.3.4: Vacancy Analysis 2004 -2005

Property	2004		2005	
	Ground	First	Ground	First
Boulton Lane	Residential	Residential / Other	-	-
10 Silver Street	-	-	-	Retail
21-23 Silver Street	-	Business	-	-
26 Silver Street	Retail	Retail	-	Residential/Other
28 Silver Street	Retail	-	-	-
30 Silver Street	-	-	Retail	Residential/Other
31 Silver Street	Retail	-	Business	-
32 Silver Street	Retail	-	Retail	-
Bristol House	Retail	-	Retail	-
40 Silver Street	-	-	Residential/ Other	-
11 Long Street	-	Residential / Other	-	-
13 Long Street	-	Residential / Other	-	-
28 Long Street	-	-	Retail	-
19a Parsonage Street	-	-	Retail	-
25 Parsonage Street	Business	-	-	-
28 Parsonage Street	-	-	Retail	Retail

31 Parsonage Street	-	-	Business	Business
32 Parsonage Street	-	-	-	Residential/Other
39 Parsonage Street	-	Business	-	-
47 Parsonage Street	-	-	Residential	Residential/Other
51 Parsonage Street	-	-	Retail	-
53 Parsonage Street	-	-	Retail	-
R/o 53 Parsonage Street	Business	Business	-	-
62 Parsonage Street	-	Residential /Other	-	-
16 Market Place	Retail	Business	-	-
19 May Lane	-	-	Ancillary	Business
11 May Lane	Business	Business	Business	Business
Library May Lane	-	-	Residential/Other	Residential/Other
Adjacent to bank Castle Street	Business	Business	-	-
R/o Delivery Office Castle Street	Residential/Other	Residential / Other	-	-
R/o Church Castle Street	Residential/Other	Residential / Other	-	-
Castle Street	-	-	Residential/Other	-

Note: ‘-’ implies either a vacant unit or where we are unable to establish usage

The plans on pages 21 and 22 and Table3.3.5 identify land uses in the centre at ground and first floor level according to the categories defined by Stroud District Council. The largest land use representation is residential, albeit the majority of these properties are at first floor level. At ground floor shopping predominates with 29% of units being occupied by comparison traders, and a further 6%, including the largest units, by convenience traders. The service category is also extremely important accounting for 26% of ground floor units.

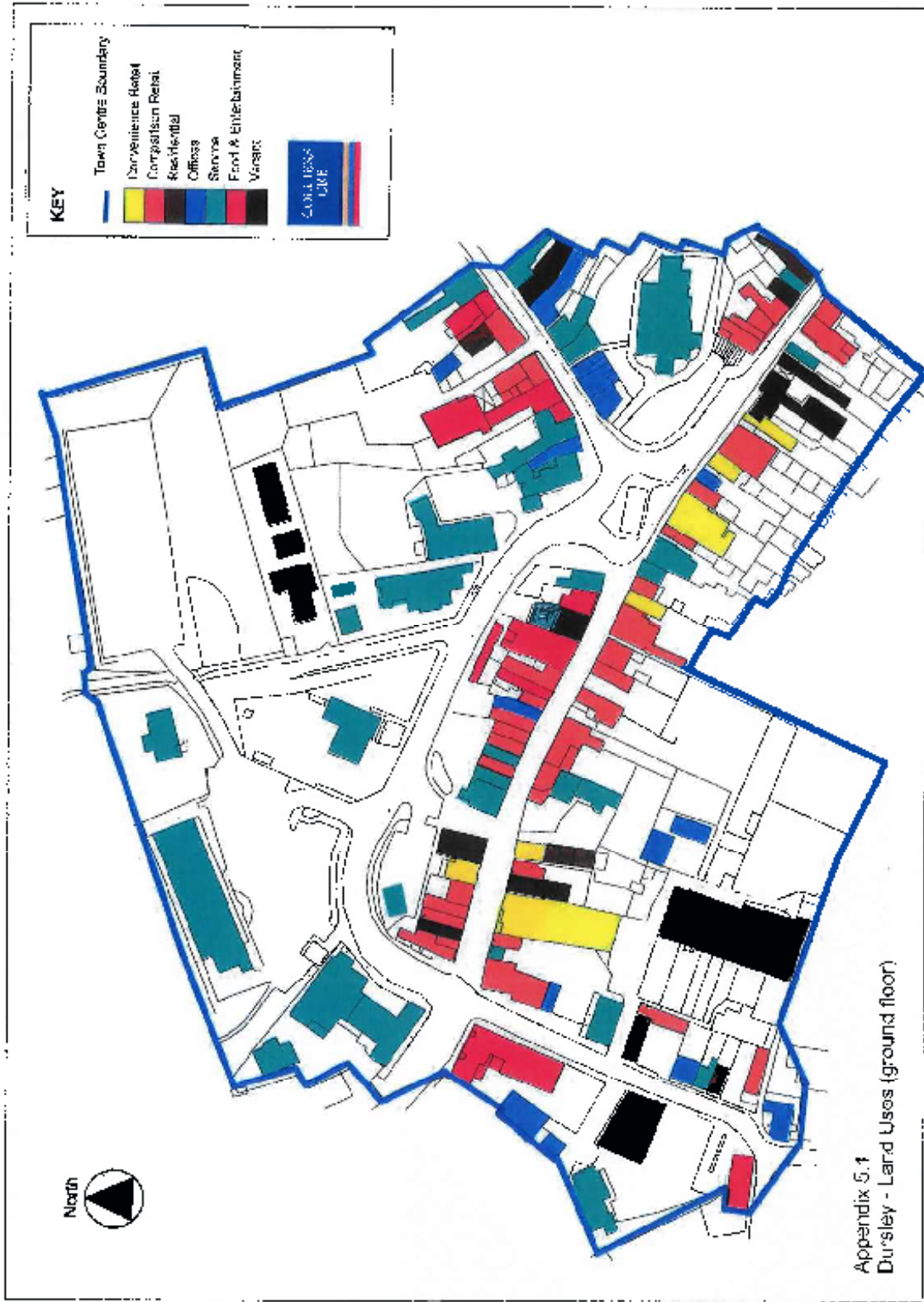
At first floor level 32% of the retail outlets have ancillary accommodation. In addition there is also good representation from offices and services.

Vacancies account for an overall total of 10% of units, comprising 11% at ground floor and 8% at first. This level of vacancy is marginally higher than the national average, but on the basis of our inspection does not appear to give rise to any undue concerns. Many of the vacancies are situated in rundown historic properties where it may be more appropriate to consider a change of use to bring these premises back into active usage.

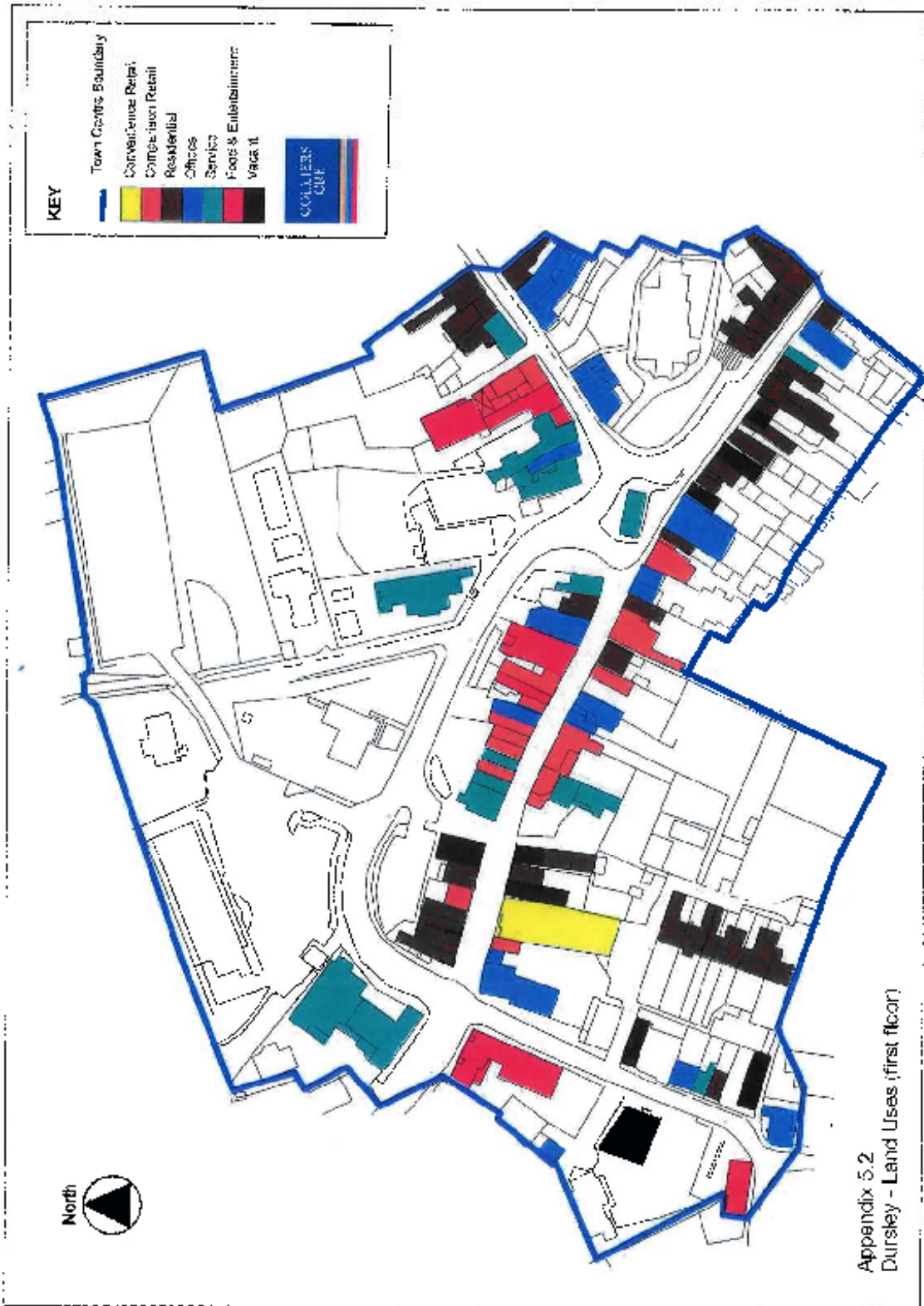
Table 3.3.5: Land Use

	GROUND	%	First	%	Total	%
Convenience	8	6	1	1	9	4
Comparison	36	29	13	13	49	21
Food & Entertainment	9	7	5	5	14	6
Residential	13	10	44	42	57	25
Offices	14	11	18	17	32	14
Service	32	26	15	14	47	20
Vacant	14	11	9	8	24	10
Total	126	100	105	100	231	100

GROUND FLOOR PLAN



FIRST FLOOR PLAN



APPENDICES

- A. Detailed Pedestrian Counts**
- B. Record Sheets**
- C. Land Use / Vacancy Schedules**

Appendix A - Detailed Pedestrian Counts

Dursley – Friday 14th October

	Enumeration point	9.30 – 10.30	10.30 – 11.30	11.30 – 12.30	12.30 – 13.30	13.30 – 14.30	14.30 – 15.30	15.30 – 16.30	16.30 – 17.30	Total
A	Cobblers, Parsonage Street Job Centre,	274	446	454	523	471	274	369	266	3077
B	Off Parsonage Street Kings Head Inn,	197	523	591	651	446	386	411	274	3480
C	Parsonage Street Bell Hotel,	291	583	677	514	531	360	377	300	3634
D	Long Street	77	137	60	146	111	60	86	60	737
E	The Vac Shop, Silver Street	189	231	154	266	146	300	163	94	1543
F	Lions Club, May Lane	180	214	197	120	146	129	120	146	1251
Total (all sites)		1209	2134	2134	2220	1851	1509	1526	1140	13723

Dursley – Saturday 15th October

	Enumeration point	9.30 – 10.30	10.30 – 11.30	11.30 – 12.30	12.30 – 13.30	13.30 – 14.30	14.30 – 15.30	15.30 – 16.30	16.30 – 17.30	Total
A	Cobblers, Parsonage Street Job Centre,	480	411	677	274	249	351	291	240	2974
B	Off Parsonage Street Kings Head Inn,	574	471	986	549	343	454	231	146	3754
C	Parsonage Street Bell Hotel,	480	583	703	454	214	566	197	77	3274
D	Long Street	146	189	180	171	60	69	86	51	951
E	The Vac Shop, Silver Street	291	274	446	154	197	77	146	60	1646
F	Lions Club, May Lane	154	266	103	69	94	43	60	34	823
Total (all sites)		2126	2194	3094	1671	1157	1560	1011	609	13423

Dursley – Tuesday 18th October

	Enumeration point	9.30 – 10.30	10.30 – 11.30	11.30 – 12.30	12.30 – 13.30	13.30 – 14.30	14.30 – 15.30	15.30 – 16.30	16.30 – 17.30	Total
A	Cobblers, Parsonage Street Job Centre,	343	420	369	317	206	369	197	180	2400
B	Off Parsonage Street Kings Head Inn,	531	549	420	420	317	386	343	223	3189
C	Parsonage Street Bell Hotel,	480	506	437	394	489	471	411	129	3317
D	Long Street	189	146	43	137	111	197	129	77	1029
E	The Vac Shop, Silver Street	274	240	137	77	120	94	146	103	1191
F	Lions Club, May Lane	231	137	94	103	137	171	34	60	969
Total (all sites)		2049	1997	1500	1449	1380	1689	1260	771	12094

Dursley – Saturday 22nd October

	Enumeration point	9.30 – 10.30	10.30 – 11.30	11.30 – 12.30	12.30 – 13.30	13.30 – 14.30	14.30 – 15.30	15.30 – 16.30	16.30 – 17.30	Total
A	Cobblers, Parsonage Street Job Centre,	0	977	1029	651	591	617	694	309	4869
B	Off Parsonage Street Kings Head Inn,	643	1003	1123	849	506	420	463	471	5477
C	Parsonage Street Bell Hotel,	531	1200	1294	711	489	514	403	240	5383
D	Long Street The Vac Shop,	86	300	360	129	94	94	231	86	1380
E	Silver Street Lions Club,	189	351	300	343	120	163	274	94	1834
F	May Lane	231	317	343	197	214	163	77	60	1603
	Total (all sites)	1680	4149	4449	2880	2014	1971	2143	1260	20546

Dursley – TOTAL FLOWS

(Friday 14th Oct / Saturday 15th Oct / Tuesday 18th Oct / Saturday 22nd Oct)

	Enumeration point	9.30 – 10.30	10.30 – 11.30	11.30 – 12.30	12.30 – 13.30	13.30 – 14.30	14.30 – 15.30	15.30 – 16.30	16.30 – 17.30	Total
A	Cobblers, Parsonage Street Job Centre,	1097	1277	1500	1114	926	994	857	686	8451
B	Off Parsonage Street Kings Head Inn,	1303	1543	1997	1620	1106	1226	986	643	10423
C	Parsonage Street Bell Hotel,	1251	1671	1817	1363	1234	1397	986	506	10226
D	Long Street The Vac Shop,	411	471	283	454	283	326	300	189	2717
E	Silver Street Lions Club,	754	746	737	497	463	471	454	257	4380
F	May Lane	566	617	394	291	377	343	214	240	3043
	Total (all sites)	5383	6326	6729	5340	4389	4757	3797	2520	39240

Appendix B - Record Sheets

DURSLEY PEDESTRIAN COUNTS ENUMERATOR SCHEDULE

Day:

Weather AM:

PM:

9.30 – 10.30

POINT	9.30 - 9.37	9.38 - 9.45	9.46 - 9.53	9.54 -10.01	10.02 -10.09	10.10 -10.17
A						
B						
C						
D						
E						
F						

10.30 – 11.30

POINT	10.30 - 10.37	10.38 - 10.45	10.46 - 10.53	10.54 -11.01	11.02 -11.09	11.10 -11.17
A						
B						
C						
D						
E						
F						

11.30 – 12.30

POINT	11.30 - 11.37	11.38 - 11.45	11.46 - 11.53	11.54 -12.01	12.02 -12.09	12.10 -12.17
A						
B						
C						
D						
E						
F						

12.30 – 13.30

POINT	12.30 - 12.37	12.38 - 12.45	12.46 - 12.53	12.54 -13.01	13.02 -13.09	13.10 -13.17
A						
B						
C						
D						
E						
F						

13.30 – 14.30

POINT	13.30 - 13.37	13.38 - 13.45	13.46 - 13.53	13.54 -14.01	14.02 -14.09	14.10 -14.17
A						
B						
C						
D						
E						
F						

14.30 – 15.30

POINT	14.30 - 14.37	14.38 - 14.45	14.46 -14.53	14.54 -15.01	15.02 -15.09	15.10 -15.17
A						
B						
C						
D						
E						
F						

15.30 – 16.30

POINT	15.30 - 15.37	15.38 - 15.45	15.46 -15.53	15.54 -16.01	16.02 -16.09	16.10 -16.17
A						
B						
C						
D						
E						
F						

16.30 – 17.30

POINT	16.30 - 16.37	16.38 - 16.45	16.46 -16.53	16.54 -17.01	17.02 -17.09	17.10 -17.17
A						
B						
C						
D						
E						
F						

Other Comments:

Appendix C – Schedule of Land Uses

DURSLEY

Survey Date: 19 October

Address	Ground Floor	Use	First Floor
May Lane – West Side			
2 Hill Road	The Old Spot Public House	A4	The Old Spot Public House
Bus Station	Bus Station	-	-
To rear of bus station	British Legion Club	Sg	None
Vacant under construction	Vacant Library under construction	D1	Vacant Library under construction
To rear of warehouse	Yard	-	-
To rear of warehouse	Office	B1	Office
18 Parsonage Street	Warehouse Bistro and Public House	A4	Warehouse Bistro and Public House
May Lane – East Side			
21	Goldinghams LLP Solicitors Offices	B1	Goldinghams Solicitors Office
19	Car showroom	Sg	Vacant
17	Residential	C3	Residential
-	Yard	-	None
15	Dursley Day Centre for the over 60's	D1	Dursley Day Centre
13	Offices (David Barnes Architect)	B1	Offices (Arcadian Timber Frames)
11a	Vacant Office	A1	Vacant Office
11	Yard	-	None
9	Lions Club of Dursley with	Sg	None
7	Tomlinson Harrison and Company Chartered Accountants	B1	Offices (Tomlinson Harrison and Company Chartered Accountants)
Vehicular Entrance	Car Park for offices	-	-
5	Apollo Video Store	A1	Offices (Tomlinson Harrison and Company Chartered Accountants)
Parsonage Street – South Side			
20	Alliance Pharmacy	A1	Offices (Tomlinson Harris & Co Chartered Accountants)
20	Cotswold Care Charity Shop	A1	Offices (Tomlinson Harris & Co Chartered Accountants)
22	Dursley Volunteer Centre	A1	Stroud Care & Repair Ltd
24	Armstrong and North Opticians	A1	Ancillary
26	Somerfield Supermarket	A1	Ancillary
28	Vacant Shop	A1	Vacant Ancillary
30	T T Discounts	A1	Residential
32	J Broomhall Butcher	A1	Vacant Residential

34	Residential	C3	Residential
36	Residential	C3	Residential
38	Residential	C3	Residential
40	Garden Entrance to the Archway Dental Practice	D1	Archway Dental Practice
44	That New Shop Gifts	A1	Ancillary
46/48	Durcan DIY and Ironmongery	A1	Ancillary
50	Bennett Jones Partnership Estate Agent	A2	Ancillary
56	Intersound Total Music Solutions, Music Shop	A1	Offices (Penleys Solicitors)
Access	Yard	-	-
62	Wildwood Flowers Limited	A1	Ancillary
64-66	Starshine Toys	A1	Residential
Alleyway	-	-	-
70/72	Boots Pharmacy	A1	Ancillary
74	Hewitts Newsagents	A1	Residential
76	Cotswold Care Shop	A1	Offices (Penleys Solicitors)
78	Cheltenham & Gloucester Building Society	A2	Offices (Penleys Solicitors)
80	HSBC Bank	A2	None
82	Entrance to Castlegate Dental Surgery	D1	-
Parsonage Street North Side			
17	The Dursley Pet Shop	A1	Residential
19	Personnel Computing Solutions	A1	Residential
19a	Vacant Dry Cleaners	A1	Residential
21	Bait Box of Dursley Fishing Tackle Specialists	A1	Residential
23	Master Cobblers Shoe Repairs and Key Cutting	A1	Residential
25/27	Mind Charity Shop	A1	Ancillary
29	Bramleys Grocers	A1	Residential
29	Traditional Bakers and Confectioners	A1	Residential
31	Vacant Job Centre	B1	Vacant Offices
Roadway	-	-	-
35a – c	Barclays Bank	A2	Ancillary
35d	Dry Clean at Gerrards	A1	Ancillary
35e	Just to Say Cards and Gifts	A1	Ancillary
35f	Mr Mark Unisex Hairstylist	A1	Ancillary
35g	Household Good Store	A1	Ancillary
35h	Cotswold Collectables	A1	Ancillary
37/39	Clinton Cards	A1	Ancillary
41	First Choice Travel Agents	A1	Ancillary
43	Inches Material	A1	Residential
45	Naomi's Café	A3	Residential
47	Blue Boy Carpets	A1	Vacant Residential
49	The Kings Head Inn	A4	The Kings Head Inn
51	Vacant Shop	A1	Offices (C K Accountants)
53	Vacant Shop	A1	Offices (C K Accountants)

55	Entrance to CK Accountants	B1	Offices (CK Accountants)
57	Dursley's Kebab and Pizza House	A5	Residential
59	Stroud and Swindon Building Society	A2	Ancillary
The Market Hall			
None	Fish, Flower and Egg Stalls underneath (Wednesday only)	-	Dursley Town Trust Premises
Silver Street – South Side			
4	Norville Opticians	A1	Residential
6	Baileys News & Post Office	A1	Offices
10	The Lighthouse Christian Bookshop	A1	Vacant Ancillary
12	Williams Parry Richards Estate Agents	A2	Residential
24	The Filling Station Sandwich Shop	A1	Residential
26	Cut Price Ink 4 U Shop	A1	Vacant residential
26	Freelance Windows	A1	Residential
28	Newscentre, Newsagent and Off Licence	A1	Residential
30	Vacant Shop	A1	Vacant Residential
32	Vacant Shop	A1	Residential
Bristol House	Vacant Shop	A1	Residential
40	Vacant A5	A5	Residential
42	The Washtub Dry Cleaners	A1	Ancillary
Entrance	Business Centre	B1	None
50	Oxfam Shop	A1	Evesham House Business Centre
52	Oxfam Shop	A1	Residential
Silver Street – North Side			
33	Residential	A1	Residential
33	Power Cuts hairdressers	A1	Residential
31	Vacant Estate Agents	A2	Residential
29	Kite n SK8	A1	Residential
27	Image Photographic Studio	A1	Residential
21/23	Apple Upholstery Limited	A1	Residential
unknown	St James the Great Church	D1	None
Long Street – East Side			
8/10	Offices (B Walker & Co (Dursley) Limited)	B1	Offices (B Walker & Co (Dursley) Limited)
12/16	Besley Hill Estate Agents	A2	Besley Hill Estate Agents
16	Halifax Personal Banking	A2	Offices (Mark Snook Planning & Architectural Consultants)
18/20	Dursley Conservative Club	Sg	Dursley Conservative Club
26	Offices (Penleys Solicitors)	B1	Offices
28	Vacant Shop	A1	Offices (Absorption Technology Limited)
30	Peter Hickman Hair	A1	Residential
Long Street – West Side			
29	The Natural Therapy Centre	A1	Residential
27	Nemos Fish Bar Takeaway	A5	Residential

23/25	The Cook Shop Furniture, Bedding, Gifts and Cookware / Cafe	A1	Part Residential, Part Kingham & Spencer Ladies Hair Salon
Road Access	Yard	-	-
21a	Malicia Electrical Contractors Premises to rear	B1	None
19	Capone's Nightclub	Sg	Nightclub
17	R P Jones Electrical Goods	A1	Above and to rear ancillary and service accommodation
13	Old Bell Hotel and Public House	A4	Old Bell Hotel and Public House
9	NatWest Bank	A2	Ancillary
7	R A Bennett Estate Agents	A2	R A Bennett Estate Agents
5	Lloyds TSB Bank	A2	Lloyds TSB Bank
Castle Street – North side			
Jacob's House	Dursley Heritage Centre	D1	None
Jacob's House	Dursley Town Council Offices	B1	Dursley Town Council Offices
Unknown	Dursley Methodist Church	D1	None
To rear of Church	Lloyds TSB Private car park	-	-
Unknown	Stroud College : Dursley Education Centre	D1	Stroud College Dursley Education Centre
Unknown	Vacant (Education Buildings)	D1	None
Unknown	Dursley Community Fire and Rescue Station	Sg	None
Unknown	Telephone Exchange	Sg	Telephone Exchange
Unknown	Dursley Youth centre	D1	None
Unknown	Dursley Pool	D2	None
Courtyard clinic	PTA Therapy and Chiropractic Clinic	D1	PTA Therapy and Chiropractic Clinic
Castle Street – South Side			
Unknown	Maurice Ball Bookmaker	A2	None
Unknown	Temporary Library	D1	None
To Rear May Lane			
Unknown	Advantage Mobility Showroom	Sg	None
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	Residential	C3	Residential
Unknown	N T Motors	B1	None