

# Stroud District Market Towns Study

## Nailsworth Data Compendium

JOB NUMBER: 5023603			DOCUMENT REF: 1026.0029			
2	Final Report	AG	AG	DB	DB	17.03.04
1	Draft Report	TV	AG	AG	DB	12.02.04
		Originated	Checked	Reviewed	Authorised	Date
Revision	Purpose Description	<b>ATKINS</b>				

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# 1. Introduction

- 1.1 This report has been developed as a town-specific supplement to the following reports:
- ◆ Report on Pedestrian Counts: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud and Wotton-under-Edge;
  - ◆ Transport and Accessibility Assessment: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud; and Wotton-under-Edge;
  - ◆ Land Use Surveys: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud and Wotton-under-Edge; and
  - ◆ Shopper Surveys: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud and Wotton-under-Edge.
- 1.2 This supplement does not provide details on the methodology employed to obtain the data that is contained within it. This information is provided in the main reports, which should be regarded as the primary reference sources.

## 2. Pedestrian Surveys

2.1 Nailsworth has the following pedestrian survey points:

- (i) Bailey's Opticians, Old Market
- (ii) Cotswolds Kitchens, Market Street
- (iii) Car Park Entrance, Butchers Hill
- (iv) RSPCA, Market Street
- (v) Edward Walker, Fountain Street
- (vi) Leonard Walker, George Street
- (vii) Springhill, Old Market

2.2 Table 2.1 provides a comparison of pedestrian flows in Nailsworth in 2002 and 2003, aggregated at each site for the three days.

**Table 2.1 – Total Pedestrian Flows: Nailsworth**

	2002	2003	%change 2003v2002
Baileys Opticians, Old Market	6084	8688	42.8
Cotswolds Kitchens, Market Street	1536	1920	25.0
Car Park Entrance, Butchers Hill	588	480	-18.4
RSPCA, Market Street	3240	4308	33.0
Edward Walker, Fountain Street	4224	5652	33.8
Leonard Walker, George Street	7056	9180	30.1
Springhill, Old Market	1884	4344	130.6
<b>TOTAL FOOTFALL</b>	<b>24612</b>	<b>34572</b>	<b>40.5</b>

2.3 Nailsworth has seen a significant increase in pedestrian flow between 2002 and 2003 with overall levels increasing by 40.5%. Despite a decrease of 18.4% at Cotswold Kitchens, all other locations show an increase of 25% or above with Springhill totals recording a vast increase of 130%.

2.4 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:

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

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

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

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

2.5 Based on the above formula, the total flows per minute for each site are as follows:

◆ Baileys Opticians	6
◆ Cotswolds Kitchens	1
◆ Car Park Entrance, Butchers Hill	1
◆ RSPCA	3
◆ Edward Walker	4
◆ Leonard Walker	6
◆ Springhill	3

2.6 Table 2.2 details relative changes in rankings between 2002 and 2003. 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 2.2 – Relative Change in Ranking: Nailsworth**

	2002 Rank	2003 Rank	Movement
Baileys Opticians, Old Market	2	2	Same
Cotswolds Kitchens, Market Street	6	6	Same
Car Park Entrance, Butchers Hill	7	7	Same
RSPCA, Market Street	4	5	Down
Edward Walker, Fountain Street	3	3	Same
Leonard Walker, George Street	1	1	Same
Springhill, Old Market	5	4	Up

2.7 Ranking between the two years remains relatively constant with just two locations swapping between rank 4 and 5 (Table 2.3).

**Table 2.3 – Daily Flows: Nailsworth**

	Friday 17.10.03		Saturday 18.10.03		Tuesday 21.10.03	
	Total	Rank	Total	Rank	Total	Rank
Baileys Opticians, Old Market	2544	2	3456	2	2688	2
Cotswolds Kitchens, Market Street	372	6	840	5	708	6
Car Park Entrance, Butchers Hill	108	7	180	7	192	7
RSPCA, Market Street	924	5	840	5	2544	3
Edward Walker, Fountain Street	1524	3	2112	3	2016	4
Leonard Walker, George Street	2664	1	3768	1	2748	1
Springhill, Old Market	1176	4	1812	4	1356	5
<b>TOTAL FLOWS</b>	<b>9312</b>		<b>13008</b>		<b>12252</b>	

**Table 2.4 – Total Daily Flow Comparisons: Nailsworth**

	2002	2003	% change
Tuesday	4596	12252	166.6
Friday	8328	9312	11.8
Saturday	11688	13008	11.3

- 2.8 Although ranking for each site is quite similar for each day (Table 2.3), it is interesting to note that Tuesday is far busier than Friday - Tuesday's footfall is 2940 higher than Friday's count and just 756 less than Saturday. This is also noticeable in the annual totals which show a 166.6% increase in daily flows on Tuesday from 2002 to 2003 (Table 2.4).

**Table 2.5 – Time of Day: Nailsworth**

Site	09:30 – 11:30	%	11:30 – 13:30	%	13:30 – 15:30	%	15:30 – 17:30	%
1	2172	25.0	2532	29.1	2040	23.5	1944	22.4
2	276	14.4	552	28.8	624	32.5	468	24.4
3	120	25.0	120	25.0	156	32.5	84	17.5
4	912	21.2	1464	34.0	1188	27.6	744	17.3
5	1500	26.5	1752	31.0	1488	26.3	912	16.1
6	2280	24.8	2376	25.9	2364	25.8	2160	23.5
7	1068	24.6	1140	26.2	1104	25.4	1032	23.8
<b>TOT</b>	<b>8328</b>	<b>24.1</b>	<b>9936</b>	<b>28.7</b>	<b>8964</b>	<b>25.9</b>	<b>7344</b>	<b>21.2</b>

NB: Site numbers refer to the maps contained at Appendix B of the main report.

- 2.9 There is little variation between levels of pedestrian flow throughout the day and, with the exception of sites 2 and 3, the peak time appears to be between 11.30 and 13.30 for all three survey days. Pedestrian flow appears to be steadiest around sites 6 and 7, with footfall changing just 2.4% throughout the day for both sites.

## CONCLUSIONS

- 2.10 The comparison with the 2002 statistics indicates a significant overall increase in footfall – an average of 40.5%. This statistic also conceals significant site fluctuations – the car park entrance at Butchers Hill was the only site to record a decrease in overall flow, calculated at 18.4% over last year, whereas Springhill at the Old Market recorded a 130.6% increase. The overall dynamics of the town are almost the same as in 2002.
- 2.11 Flow throughout the day is reasonably even, with a slight bias towards the first half of the day and 11:30am – 1:30pm forming the overall peak flow period.

### 3. Vacant Premises Audit

#### Vacancy

- 3.1 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. 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 Vacancy Analysis: Nailsworth**

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

Numbers in brackets indicate multiple units at one address

KEY:

	Retail
	Business
	Residential/Other

**Table 3.2 – Vacancy by Type: Nailsworth**

Type	No. of Units	%
Retail	6	26
Business	4	17
Residential/Other	13	57
<b>TOTAL</b>	<b>23</b>	<b>100</b>

- 3.2 The Nailsworth audit identified 23 vacant units at ground and first floor level, a significant number of which are located along Market Street (74%). Over half of the units identified - 57% - fall into the residential/other category, with all but one of these units being at the first floor level. Of the remainder, 26% are categorised as retail (all located on Market Street) and there are four vacant 'business' units (17%), most of which are at ground floor level.

### Land Uses

**Table 3.3 - Land Uses: Nailsworth**

	Ground Floor (GF)	% of GF units	Upper Floor (UF)	% of UF units	Total units	% of Total Units
Convenience	12	9	0	0	12	5
Comparison	49	37	11	12	60	26
Residential	8	6	43	45	51	23
Offices	14	10	9	9	23	10
Service	39	30	19	20	58	26
Vacant	10	8	13	14	23	10
<b>TOTAL</b>	<b>132</b>	<b>100</b>	<b>95</b>	<b>100</b>	<b>227</b>	<b>100</b>

- 3.3 Nailsworth has two main shopping areas within the town core, severed and segregated to some degree by the road layout – there is a mini-roundabout arrangement at the western end of the town that is somewhat awkward for non-motorised users, and the arrangement of parking and access/egress at Old Market make pedestrian circulation hazardous, particularly at peak times.
- 3.4 The town has a sizeable comparison retail element of 60 units (over a quarter of all units: 26%), which comprise a mix of independent, 'boutique' and 'high street names' serving as trip generators and an equally large service sector, which includes some apparently popular pubs and cafés/restaurants. Residential units are also well – represented in the centre of Nailsworth, with a total of 51 units being identified (23% of all units). The office sector appears to be modest in size, representing just 10% of all units – the same representation as vacant units in the town core.

## 4. Transport Inventory

### PUBLIC TRANSPORT

- 4.1 Public transport access and facilities can be seen in the main report - Transport and Accessibility Assessment: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud; and Wotton-under-Edge.

#### *Bus Facilities*

**Table 4.1 -- Nailsworth Bus Services**

Number	Operator	Route	Frequency
269	Andybus	Forest Green - Nailsworth - Tetbury – Malmesbury	Thurs and Sat, 2 hourly three times per day from 0950 to 1350
40	Stagecoach in the Cotswolds	Stroud - Nailsworth - Wotton-Under-Edge	Mon-Sat 8.25-17.25 every 2 hours
46	Stagecoach in the Cotswolds	Cheltenham - Brockworth - Stroud - Nailsworth - Forest Green	Mon-Sat hourly
61	Cotswold Experience	Nailsworth to Shortwood	Mon-Tue-Fri 3 trips
61B	Cotswold Experience	Nailsworth to Pinfarthings	Mon and Wed 1 trip
62	Ebley Coach Services	Minchinhampton - Nailsworth – Dursley	Mon to Fri 3 trips
628	Stagecoach in the Cotswolds	Stroud - Nailsworth - Yate – Bath	Mon-Sat approx hourly
93	Stagecoach in the Cotswolds	Gloucester - Stroud - Nailsworth - Forest Green	Mon-Sat every 30-40 mins from 0540 to 2010
T4	Stagecoach in the Cotswolds	Minchinhampton to Stroud (Tesco)	Tues (Shop Service) 1 trip

- 4.2 Nailsworth is well served by bus services with Stagecoach in the Cotswolds operating 2-4 services per hour to Stroud (more in the peak hours), with a Bath service each hour, a Cheltenham service each hour and a service to Gloucester operating every 30 to 40 minutes.
- 4.3 There are also a number of local services: Andybus operates a local service on Thursdays and Saturdays between Forest Green and Malmesbury. Cotswold Experience operates services to Shortwood three times per week and Pinfarthings once per week. Ebley Coach Services operates a service to Minchinhampton and Dursley, which runs three times per day.
- 4.4 Bus facilities within the centre are concentrated at the Bus Station, which is in a central location and offers two seated shelters, public conveniences and timetables for services 40, 46, 93, 628, 61, 61A, 61B, 61C, 62, 62B, 67 and 269.

### *Taxi Facilities*

- 4.5 There are no specific taxi facilities in Nailsworth.

### *Rail Facilities*

- 4.6 There are no rail services available in Nailsworth. The nearest station is Stroud, approximately 4 miles away.

### **VEHICULAR ACCESSIBILITY**

- 4.7 Vehicular access, parking and restrictions can be seen in the main report - Transport and Accessibility Assessment: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud; and Wotton-under-Edge.

### *Routes*

- 4.8 Nailsworth town centre is bisected by the A46, which causes a degree of severance within the town. The A46 brings in the majority of traffic from both a northerly (Stroud) and southerly direction (Bath). Settlements to the south west of the town, such as Dursley and Wotton-under-Edge, are linked to Nailsworth via the B4058, whilst access from the south east is provided via the B4014. Unclassified roads enter Nailsworth from Nymphsfield and Minchinhampton.
- 4.9 Nailsworth is 6.2 miles from Junction 13 of the M5.

### *Access Restrictions*

- 4.10 There are one-way systems in operation along Market Street and Church Street, preventing traffic turning onto the A46 Fountain Street.

### *Off Street Parking*

- 4.11 There is a reasonable supply of off-street parking, although this appears to be operating close to capacity at busy times. On the western side of Old Market there is a car park, containing approximately 20 short stay and 30 long stay spaces. This is operated by SDC and has parking time limits of two hours and 23 hours respectively. There is another SDC owned car park to the east of Old Market, which incorporates parking to the rear of the parade of shops next to the bus station. This car park has a four hour limit and includes three disabled spaces, two of which have direct pedestrian access onto Market Street. There are a further 12 spaces in the Bus Station and 18 bays at the Northern end of Old Market – both of these parking areas are controlled by SDC and have a two hour limit. All car parks are free of charge.
- 4.12 Somerfield provides a large shoppers car park to the east of the town, accessed from George Street. This offers two hours free parking to its customers. The new Tesco convenience store on Old Market also provides customer parking.

### *On Street Parking*

- 4.13 There is a degree of on-street parking in the town centre: there are areas along Old Market, on both sides of the street adjacent to the Police Station and outside the row

of shops at the southern end of the street all with a waiting limit of 30 minutes and no return within 30 minutes after leaving; and there is some unrestricted on-street parking at the northern end.

- 4.14 There are four spaces on Fountain Street set aside from the main carriageway in a lay-by. These have a waiting limit of one hour with no return within an hour of leaving. There are a further four spaces in front of the Lloyds Bank which are unrestricted. Illegal parking issues were observed opposite the bank on Tabram's Pitch involving users of the bank and nearby shops stopping on double yellow lines.

#### *Traffic Orders and Restrictions*

- 4.15 There are "No Waiting" restrictions on Fountain Street, George Street, Tabram's Pitch, Spring Hill, Butchers Hill Lane and part of the southern end of Old Market. Old Market and Market Street have "No Waiting" restrictions between 8am and 6.30pm.

#### *Servicing*

- 4.16 Most servicing is done on-street, particularly in the older units to the east of the town. Many of the units along Old Market have rear servicing and Somerfield has a dedicated service area.

### **PEDESTRIAN AND CYCLIST ACCESSIBILITY**

- 4.17 A map showing the accessibility and facilities for pedestrians and cyclists is illustrated in the main report - Transport and Accessibility Assessment: Berkeley; Dursley; Nailsworth; Stonehouse; Stroud; and Wotton-under-Edge.

#### **Pedestrian Accessibility**

##### *Pavements, Desire Lines and Access Routes*

- 4.18 There is a degree of severance within Nailsworth Town Centre caused by the A46 bisecting the town making pedestrian linkage between the two sides (Old Market and George Street) awkward.
- 4.19 The western side of the town has a good level of permeability with pedestrian links between Market Street and the car park on Old Market and through a landscaped area between Fountain Street and the bus station.
- 4.20 The pavements, although level and in adequate condition, are very narrow, particularly along Fountain Street and Market Street where it is difficult to pass.
- 4.21 The desire lines across Fountain Street are catered for by zebra crossings. However, crossing is difficult around the A46/George Street roundabout.

##### *Facilities and Signage*

- 4.22 There is just one pedestrian interpretation sign, which is on the corner of Old Horley Road and Market Street where there is very little footfall. The main pedestrian routes have no signage.

- 4.23 There are three zebra crossings: two over the busy A46 close to Market Street and at the opposite end close to the roundabout; and one on Old Market opposite the bus station. Each of these has tactile edges.
- 4.24 There are two pedestrian refuges: one at the end of George Street and one at the end of Spring Hill.

#### *Facilities for the Mobility Impaired*

- 4.25 There are 16 drop kerbs with tactile paving on Old Market, Fountain Street and at the junction with Springhill. The link between the Old Market Car Park and Market Street has a disabled ramp with tactile paving.

#### **Cycling Accessibility**

- 4.26 Cycle accessibility in Nailsworth Town Centre is poor, with no designated cycle paths, lanes or safety facilities. There are four cycle racks in front of the Police Station. Despite this, Nailsworth is the starting point for the Stroud Valleys Pedestrian/Cycle Trail, part of Sustrans Cycle Network 45 which links Nailsworth with Woodchester, Stroud, Ryeford and Stonehouse along the dismantled Stonehouse – Nailsworth Railway Line.

## 5. Shopper Surveys

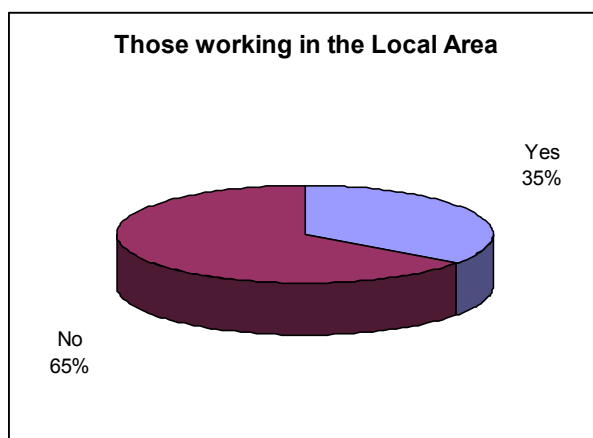
- 5.1 Shopper surveys were undertaken in the centre of Nailsworth on Monday 1<sup>st</sup> December, Tuesday 2<sup>nd</sup> December, Wednesday 3<sup>rd</sup> December and Saturday 6<sup>th</sup> December. The interviews were conducted by IQCS interviewers briefed to approach the 'next available person' to complete a pre-designed questionnaire. The same process was undertaken simultaneously in the other five towns over both weekday and Saturdays in November/December until respondent quotas were achieved.
- 5.2 This section presents a selection of the Nailsworth specific elements of the raw data in tabulated form and provides an initial level of graphical comparison, supported by basic analysis. Full statistical details are provided elsewhere in the main report.

**Table 5.1 – Date of Surveys**

Date	No. of Surveys	% of all Surveys
Monday 1 <sup>st</sup> December	26	28.6%
Tuesday 2 <sup>nd</sup> December	27	29.7%
Wednesday 3 <sup>rd</sup> December	27	29.7%
Saturday 6 <sup>th</sup> December	11	12.1%
<b>TOTAL</b>	<b>91</b>	<b>100.0%</b>

**Table 5.2 – Time of Surveys**

Time	No. of Surveys	% of all Surveys
9am – 12pm	20	22.0%
12pm – 2pm	30	33.0%
2pm – 5pm	41	45.1%
<b>TOTAL</b>	<b>91</b>	<b>100</b>



**Figure 5.1 – Percentage of Respondents that Work in Local Area**

**Table 5.3 – Percentage of Respondents that Work in the Local Area**

	No. of Surveys	% fo all Surveys
Work in Local Area	32	35.2%
Do not work in Local Area	59	64.8%

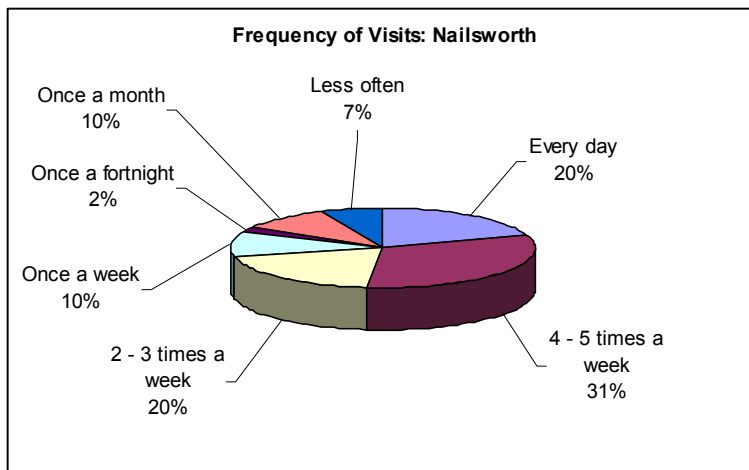
5.3 The breakdown of work locations for those respondents stating that they worked in the local area is as follows:

- ◆ Nailsworth 81.3% (26 respondents)
- ◆ Dursley 6.3% (2 respondents)
- ◆ Stroud 6.3% (2 respondents)
- ◆ Stonehouse 3.1% (1 respondent)
- ◆ Horsley 3.1% (1 respondent)

5.4 It is important to note that the phrasing of the question relating to working in the local area was such that a response of ‘no’ was not clarified. As such, those responding in the negative may either work elsewhere or, as is more likely given the overall demographic profile of respondents, either do not work out of choice or are retired and/or of pensionable age.

**Table 5.4 – Frequency of Visits to Nailsworth**

	No. of Surveys	% of all Respondents
every day	18	19.8%
4-5 times a week	29	31.9%
2-3 times a week	18	19.8%
once a week	9	9.9%
once a fortnight	2	2.2%
once a month	9	9.9%
less often	6	6.6%



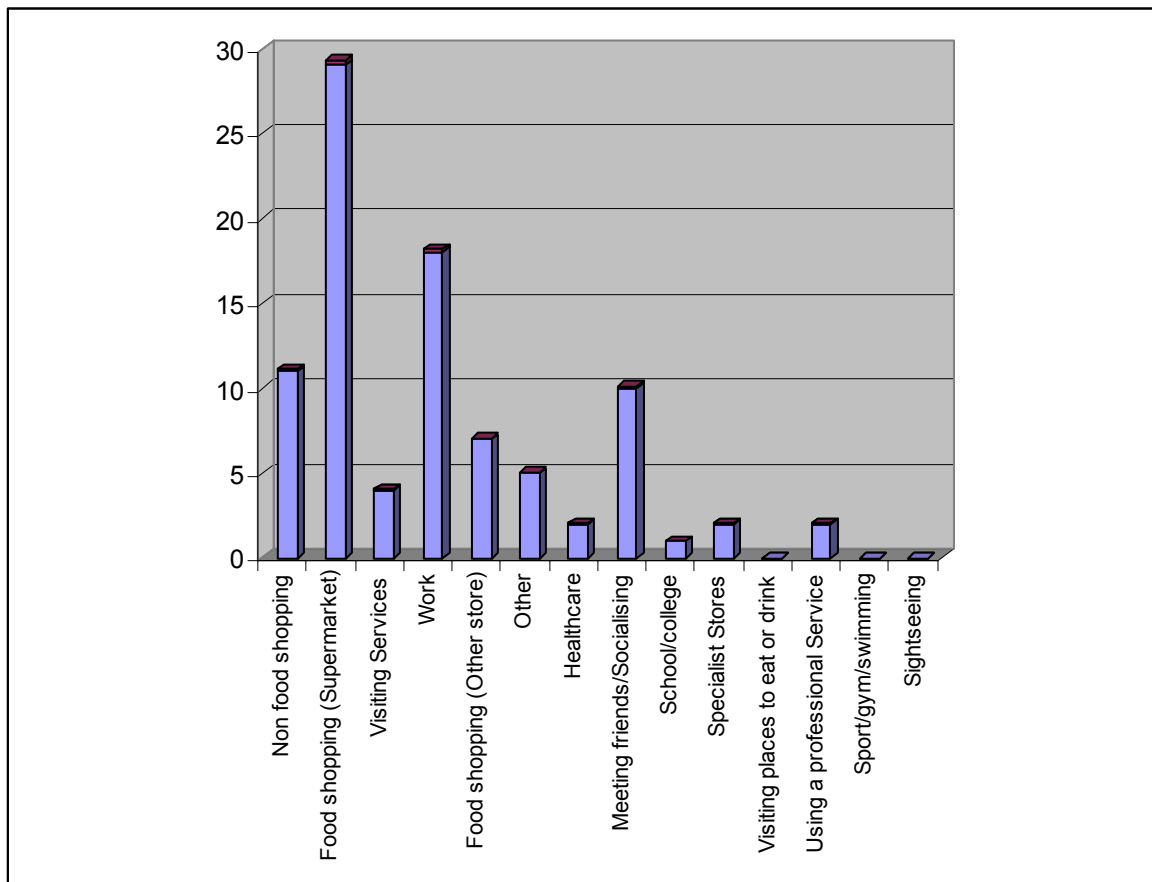
**Figure 5.2 – Frequency of Visits to Nailsworth**

- 5.5 It is apparent from Figures 5.1 and 5.2 that even though the majority of respondents (65%) did not work in the local area, a significant number of people surveyed visited the town either daily (20%) or 4-5 times each week (31%), with these frequent users accounting for just over half of all respondents (51%). A further 20% of respondents stated that they visited the town 2-3 times each week. This suggests that the town has a reasonable base of regular users from a range of local settlements and as such, suggesting that Nailsworth acts as a local service centre.

**Table 5.5 – Purpose of Visit to Nailsworth**

	No. of Surveys	% of all Surveys
<b>Non-food shopping</b>	<b>11</b>	<b>12.1%</b>
<b>Food Shopping (Supermarket)</b>	<b>29</b>	<b>31.9%</b>
<b>Visiting Services</b>	<b>4</b>	<b>4.4%</b>
<b>Work</b>	<b>18</b>	<b>19.8%</b>
<b>Food Shopping (other store)</b>	<b>7</b>	<b>7.7%</b>
<b>Other</b>	<b>5</b>	<b>5.5%</b>
<b>Healthcare</b>	<b>2</b>	<b>2.2%</b>
<b>Meeting Friends/Socialising</b>	<b>10</b>	<b>11.0%</b>
<b>School/College</b>	<b>1</b>	<b>1.1%</b>
<b>Specialist Stores</b>	<b>2</b>	<b>2.2%</b>
Visiting Places to Eat or Drink	0	0.0%
<b>Using a Professional Service</b>	<b>2</b>	<b>2.2%</b>
Sport/Gym/Swimming	0	0.0%
Sightseeing	0	0.0%

Figure 5.3 – Purpose of Visit to Nailsworth



5.6 Figure 5.3 suggests that Nailsworth has a role as location for purchasing convenience goods as well as acting as an important employment centre with approximately a third of respondents (31.9%) citing the main purpose of their trip as food shopping and a fifth (19.8%) stating the main reason for being in Nailsworth as work. Convenience shopping (12.1%) and meeting friends and socialising (11%) were also significant reasons amongst respondents. Taken together, these responses suggest that Nailsworth is a town that serves a variety of different purposes, which is a positive indication in terms of securing vitality.

5.7 Respondents were also requested to indicate any other reasons for visiting the town on the day that they were surveyed – responses were as follows:

- ◆ food shopping (supermarket) 22.0% (20 respondents)
- ◆ food shopping (other store) 20.9% (19 respondents)
- ◆ non food shopping 25.3% (23 respondents)
- ◆ visiting services 4.4% (4 respondents)
- ◆ visiting places to eat or drink 1.1% (1 respondent)
- ◆ meeting friends/socialising 9.9% (9 respondents)
- ◆ Work 13.2% (12 respondents)

- ◆ School/College 1.1% (1 respondent)
- ◆ Sightseeing 2.2% (2 respondents)
- ◆ Using a Professional Service 2.2% (2 respondents)
- ◆ Healthcare 2.2% (2 respondents)
- ◆ other 5.5% (5 respondents)

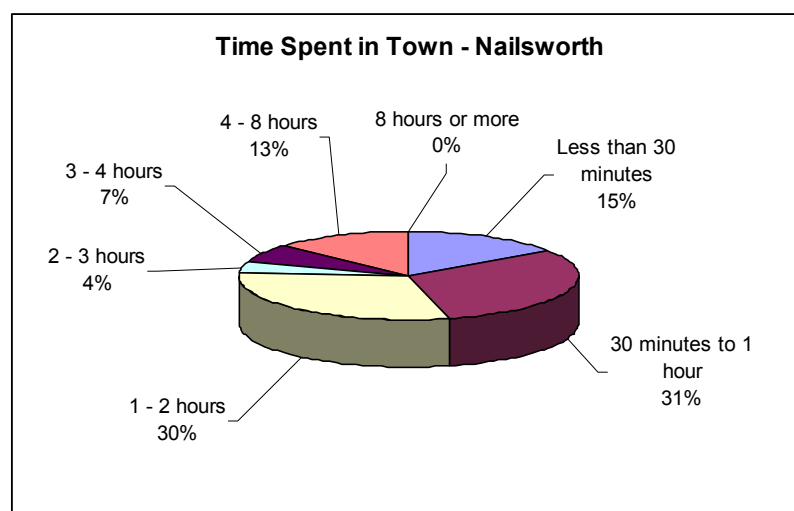
This highlights similar purposes for visiting the town as those cited as the *main* purpose– shopping and services. However, it also highlights that a significant number (at least 25.3%) of respondents use the town for multi-purpose or ‘linked’ trips. This is an important element of promoting vitality as it can potentially increase the amount of time a person spends in the town, thus increasing movements through the town.

**Table 5.6 – Time Spent in the Town: Nailsworth**

	No. of Surveys	% of all Surveys
less than 30 minutes	14	15.4%
30 minutes – 1 hour	28	30.8%
1 – 2 hours	27	29.7%
2 – 3 hours	4	4.4%
3 – 4 hours	6	6.6%
4 – 8 hours	12	13.2%
8 hours or more	0	0.0%

5.8 As detailed in Table 5.6 and illustrated in Figure 5.4, the majority (approximately 61%) of those surveyed intended to spend between 30 minutes and 2 hours in the town, with only 15% stating that they would stay less than 30 minutes. There is also a significant minority – 13% - that stated that they would be in the town for between 4 and 8 hours – this is likely to be a reflection of the employment function.

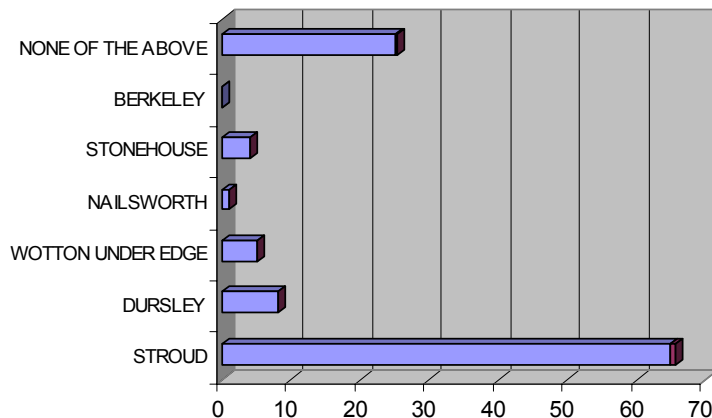
**Figure 5.4 – Time Spent in Nailsworth**



5.9 Respondents were requested to indicate and detail whether there were any other towns both within and outside the Study Area that they visited on a regular basis. The results of these questions are provided in Tables 5.7 and 5.8 and illustrated in Figures 5.5 and 5.6. It should be noted that respondents were permitted to mark as many as were relevant and in some instances the town in which they were interviewed was also included as a regular destination.

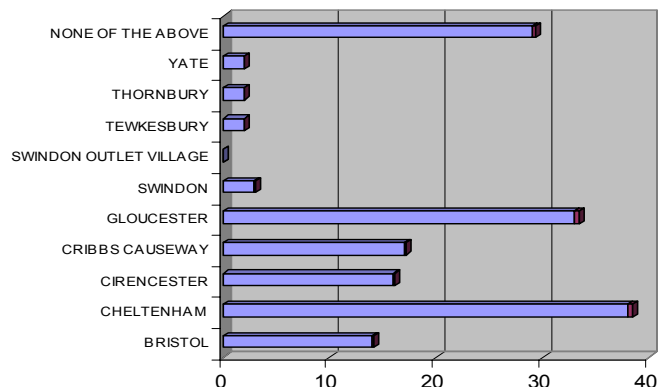
**Table 5.7 – Study Towns Visited Regularly**

Town	No. of Surveys	% of all Surveys
Stroud	65	71.4%
Dursley	8	8.8%
Wotton-under-Edge	5	5.5%
Nailsworth	1	1.1%
Stonehouse	4	4.4%
Berkeley	0	0.0%
None of the above	25	27.5%



**Figure 5.5 – Study Towns Visited Regularly**

**Figure 5.6 – Other Centres Visited Regularly**



**Table 5.8 – Other Centres Visited Regularly**

Centre	No. of Surveys	% of all Surveys
Bristol	14	15.4%
Cheltenham	38	41.8%
Cirencester	16	17.6%
Cribbs Causeway	17	18.7%
Gloucester	33	36.3%
Swindon	3	3.3%
Swindon Outlet Village	0	0.0%
Tewkesbury	2	2.2%
Thornbury	2	2.2%
Yate	2	2.2%
None of the Above	29	31.9%

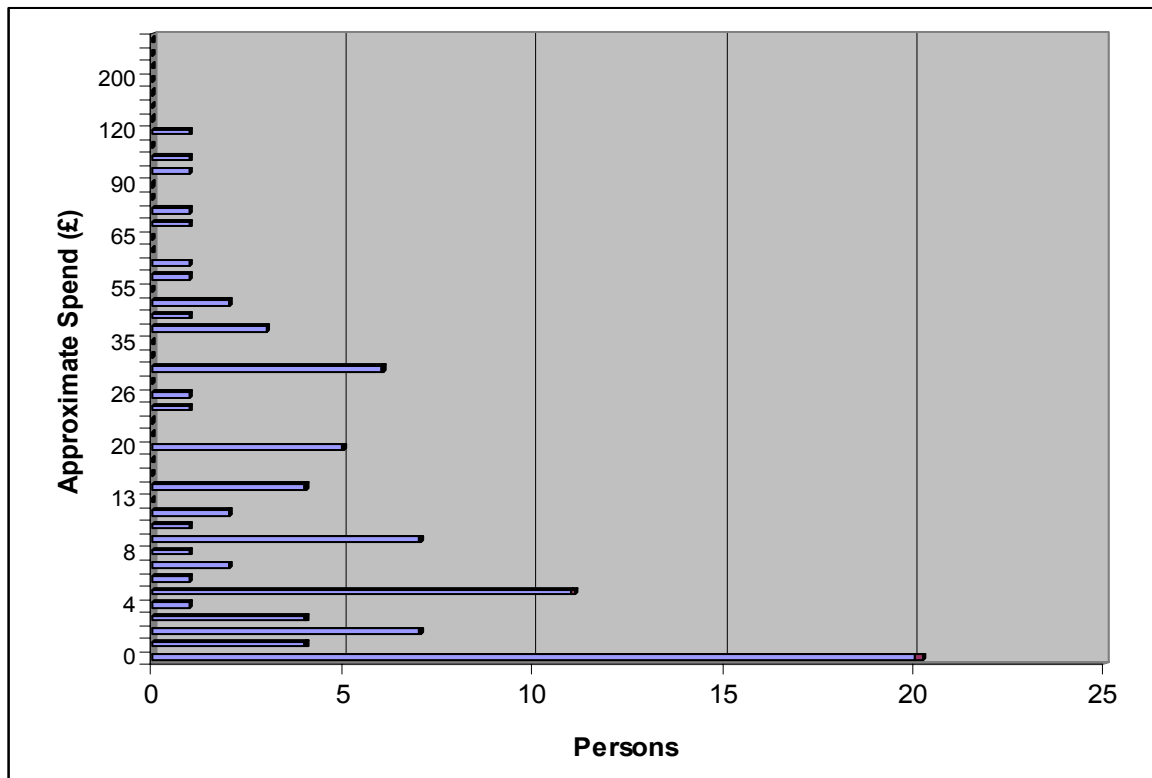
- 5.10 It is apparent from Figure 5.5 that a significant proportion of all respondents regularly visit town centres outside the Stroud District. Amongst this proportion, Cheltenham was clearly the most popular destination with well over a third (41.8%) of respondents visiting regularly. Gloucester was also a fairly popular alternative destination (36.3%) and a significant proportion were regular visitors to other centres not listed within the survey (31.9%).
- 5.11 Respondents were also requested to cite their main reasons for visiting other centres both within the study area and beyond. Responses are summarised as follows:
- ◆ *Reasons for Visiting other Centres in the Study Area:*
    - ◆ convenient to home 24.2% (16 respondents)
    - ◆ convenient to work 3.0% (2 respondents)
    - ◆ good range of food shops 31.8% (21 respondents)
    - ◆ specialist shops 10.6% (7 respondents)
    - ◆ good range of non food shops 28.8% (19 respondents)
    - ◆ good range of services 4.5% (3 respondents)
    - ◆ good range of places to eat and drink 3.0% (2 respondents)
    - ◆ easy to get to by public transport 6.1% (4 respondents)
    - ◆ easy to get to by car 1.5% (1 respondent)
  - ◆ *Reasons for Visiting other Centres outside the Study Area:*
    - ◆ convenient to home 4.8% (3 respondents)
    - ◆ convenient to work 4.8% (3 respondents)
    - ◆ good range of food shops 22.6% (14 respondents)

- ◆ specialist shops 9.7% (6 respondents)
- ◆ good range of non food shops 85.5% (53 respondents)
- ◆ good range of places to eat and drink 3.2% (2 respondents)
- ◆ easy to get to by public transport 3.2% (2 respondents)
- ◆ easy to get to by car 6.5% (4 respondents)

5.12 It is interesting to note that almost a quarter of respondents visiting other centres within the district cited convenience to home as a major factor. In addition to this, almost a third of respondents cited a good range of food and non-food shops (31.8% and 28.8% respectively) as a reason for visiting other centres, which could be interpreted as reflecting the variety of the ‘offer’ within each of the District’s major towns.

5.13 With regard to travelling further afield, the principal reason cited was ‘a good range of non-food shops’, with over four fifths of respondents (85.5%) mentioning this factor and a further 9.7% citing ‘specialist shops’ as an attraction – this is likely to be a reflection of the fact that Cheltenham and Gloucester (the top two alternative destinations) both serve a regional function and therefore house a wide range of both multiple and independent retailers.

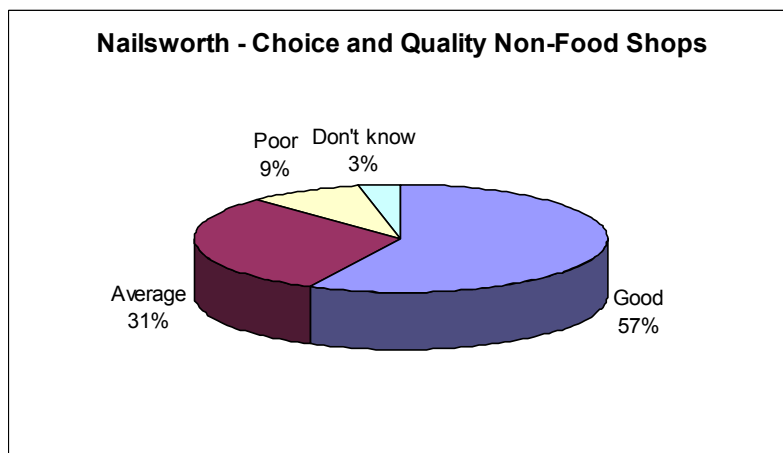
**Figure 5.7 – Amount Spent in Nailsworth**



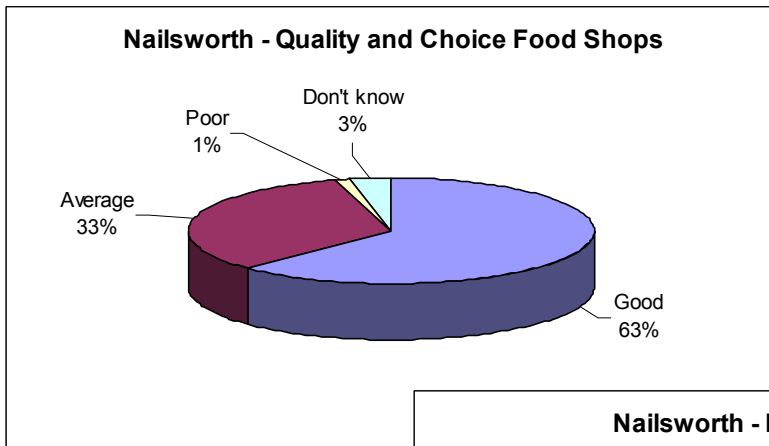
- 5.14 Figure 5.7 indicates respondents' estimated spend in the town of Nailsworth. From this and the information provided previously it is evident that although the majority of users intended staying in the town for between 30 minutes and 2 hours, quite a high proportion of respondents envisaged spending or had already spent less than ten pounds on their visit. There were also some anomalously high responses to this question, although this is probably a reflection of the time of year with the rush to purchase Christmas presents.
- 5.15 The questionnaires incorporated a number of questions concerned with ascertaining shopper opinions of the facilities and services available in Nailsworth. These relate to food and non-food shopping; range of services; public toilets; accessibility by a range of modes; and personal views on safety and security. The results are set out in Table 5.9 and illustrated in Figures 5.8 – 5.15.

**Table 5.9 – Shopper Opinions on Facilities and Services**

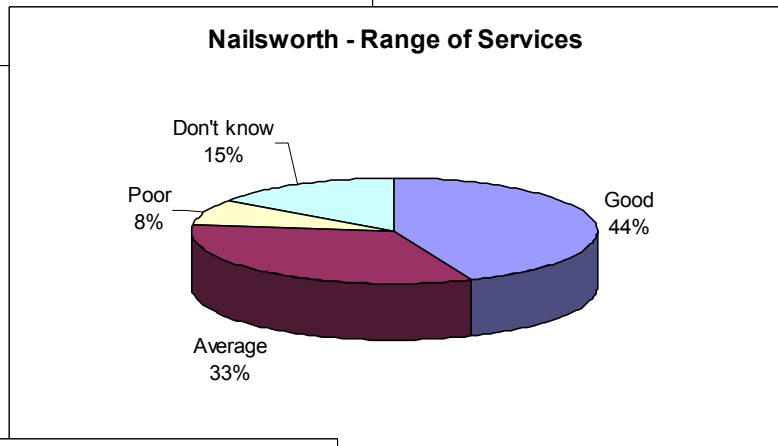
	Good		Average		Poor		Don't Know	
	No.	%	No.	%	No.	%	No.	%
Non food shops	52	57.1	28	30.8	8	8.8	3	3.3
Food Shops	57	62.6	30	33.0	1	1.1	3	3.3
Range of Services	40	44.0	30	33.0	7	7.7	12	15.4
Public Toilets	12	13.2	20	22.0	33	36.3	26	28.6
Accessibility by Public Transport	50	54.9	12	13.2	6	6.6	23	25.3
Accessibility by Car	55	60.4	14	15.4	4	4.4	18	19.8
Accessibility by Foot/Cycle	41	45.1	13	14.3	18	19.8	19	20.9
Security/Personal Safety	83	91.2	3	3.3	4	4.4	1	1.1



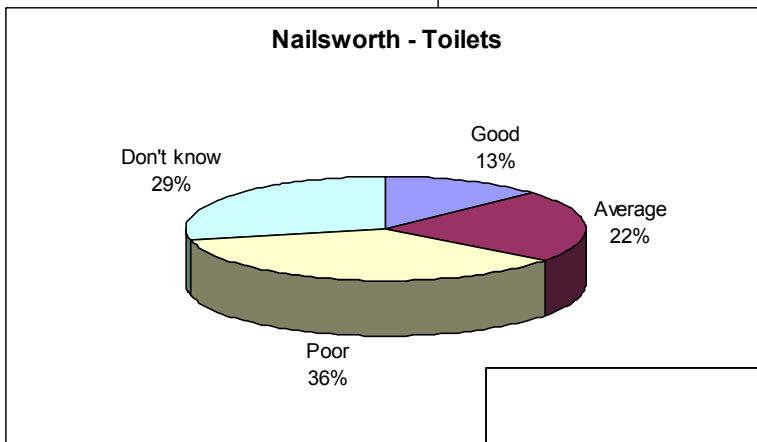
**Figure 5.8 – Opinions on Non-food Shops in Nailsworth**



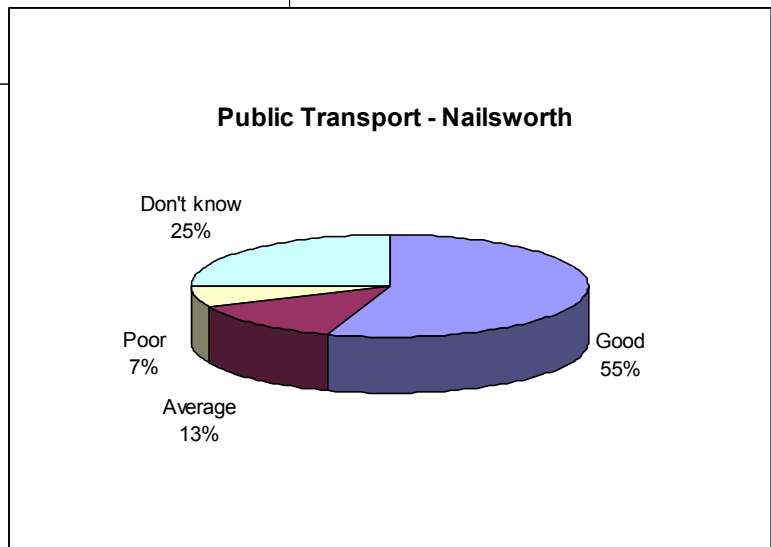
**Figure 5.9 – Opinions on Food Shops in Nailsworth**



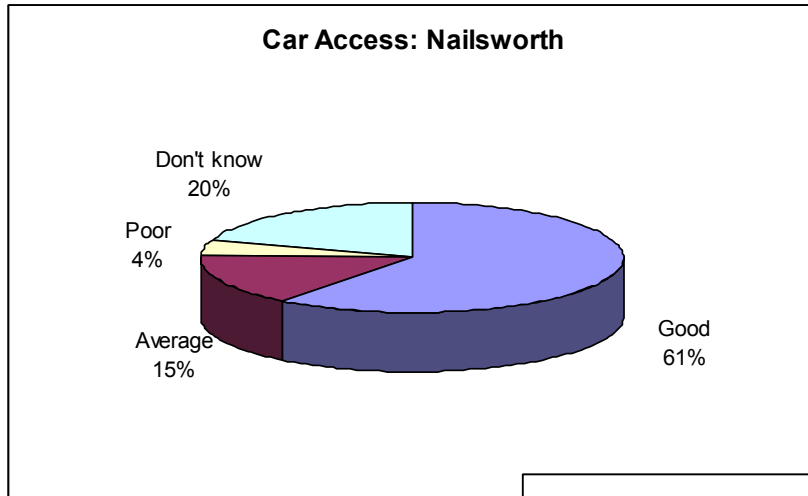
**Figure 5.10 – Range of Services in Nailsworth**



**Figure 5.11 – Public Toilets in Nailsworth**

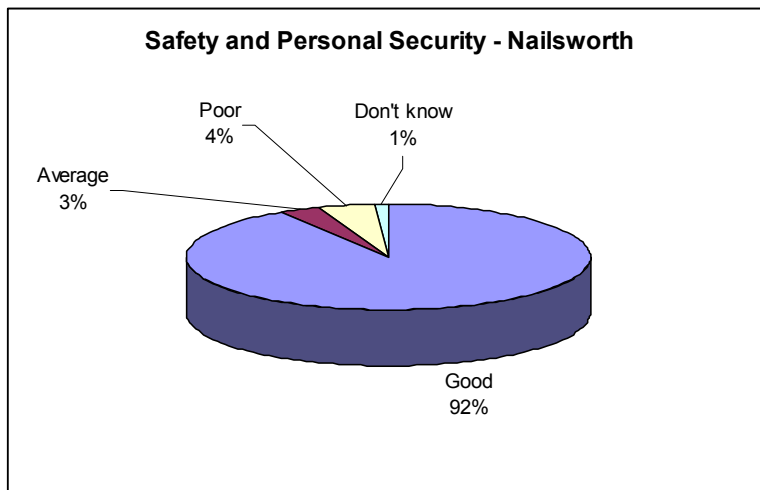
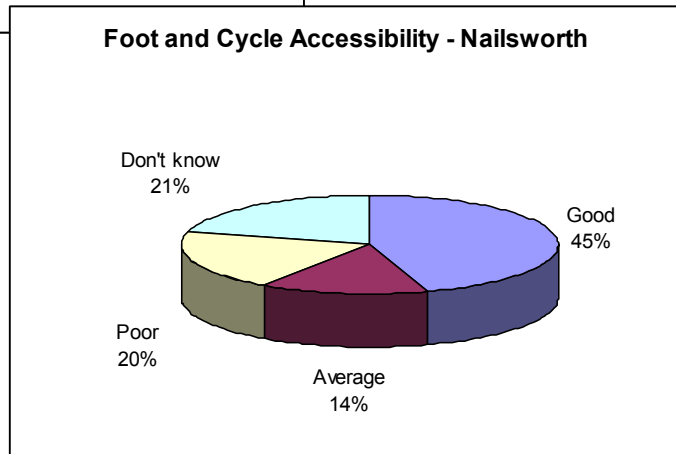


**Figure 5.12 – Public Transport Accessibility: Nailsworth**



**Figure 5.13 – Accessibility by Car: Nailsworth**

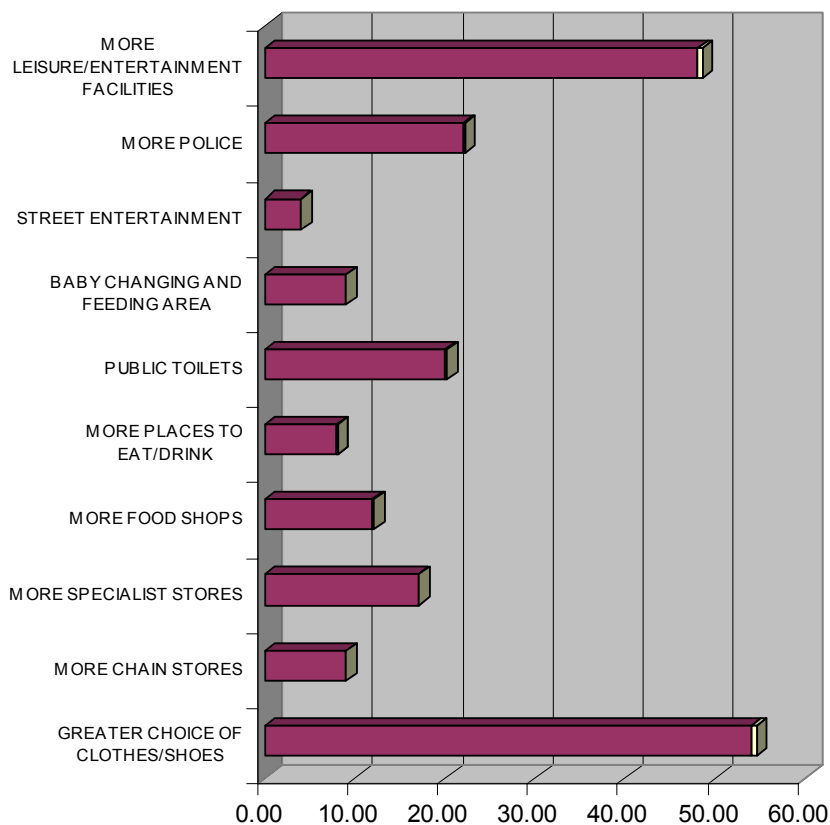
**Figure 5.14 – Foot/Cycle Accessibility: Nailsworth**



**Figure 5.15 – Security/Personal Safety: Nailsworth**

5.16 On the whole, respondents’ opinions on the shopping and service elements of the town were favourable. 31% felt that the non-food shops in Nailsworth were average with a further 57% rating them as good, totalling 88% overall, which is a vast majority. Almost all respondents rated food shops as average (33%) or good (63%), totalling 96%.

- 5.17 Overall, the range of services on offer in the town were graded good or average by a significant majority of respondents – 44% and 33% respectively, although it is interesting to note that 15% of respondents stated that they did not know what the services were like, suggesting that the town has a variety of different roles locally.
- 5.18 The quality of public toilets, which has been highlighted as a major issue through local consultation, were left ungraded by approaching a third of respondents (29%) who stated that they simply didn't know what they were like, however over a third (36%) felt them to be of poor quality.
- 5.19 With regard to the town's accessibility, the vast majority of respondents graded car access as either good (61%) or average (15%), although 20% stated that they did not know, thus suggesting that they use alternative modes – a positive sign in terms of seeking sustainable development of the town. Public transport also scored relatively well with over two thirds of respondents grading it as either good (55%) or average (13%). With regard to foot and cycle access, a total of 45% of respondents considered it to be good, however a fifth of respondents believed it to be poor and just over a fifth (21%) stated that they did not know what foot and cycle access to Nailsworth was like – this would appear to suggest that there may be an issue for further consideration at the community level.
- 5.20 In terms of personal security and safety it is encouraging to note that 92% of respondents rated personal safety/security as good with only 4% rating this aspect of the town as poor.



**Figure 5.16 –  
Additional Shops and  
Services Suggested**

- 5.21 Figure 5.16 provides a breakdown of respondents' views pertaining to additional shops and services that they stated they would like to see in Nailsworth.
- 5.22 In general terms the responses to the questionnaire seem to suggest that interviewees would like to see the quality of the town's offer in terms of comparison shopping and leisure and entertainment facilities somewhat upgraded. Of particular note is the proportion of respondents highlighting a desire for more clothes and/or shoe shops (59.3%) and more leisure and entertainment facilities (52.7%). Almost a fifth of respondents also highlighted a desire to see more specialist shops in the town (18.7%).
- 5.23 In addition to this and despite the fact that the majority of respondents graded security/safety as either good or average, 24.2% of respondents also stated that they would welcome more police in the town. Improvements to public toilets were also highlighted through the questionnaire responses, 22% of respondents making reference to the quality of provision.

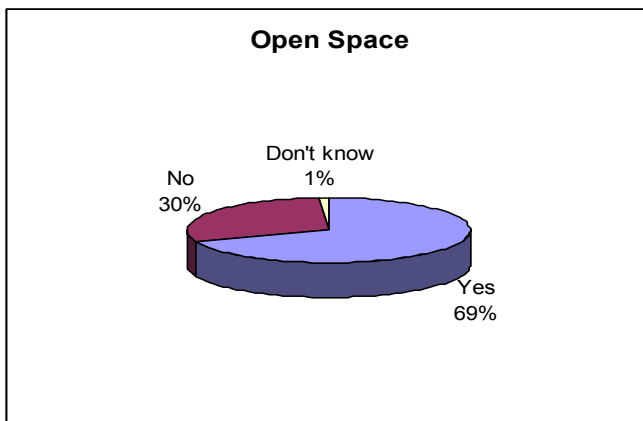


Figure 5.17 – Open Space: Nailsworth

- 5.24 With regard to open space in the town, Figure 5.17 clearly indicates that the majority of respondents – 69% - felt that there was sufficient provision in the town. However the remainder, which represents almost a third of respondents, believes that there is insufficient open space, thus highlighting a potential demand. In terms of respondents' use of this public open space, the most popular activities are illustrated by Figure 5.18.

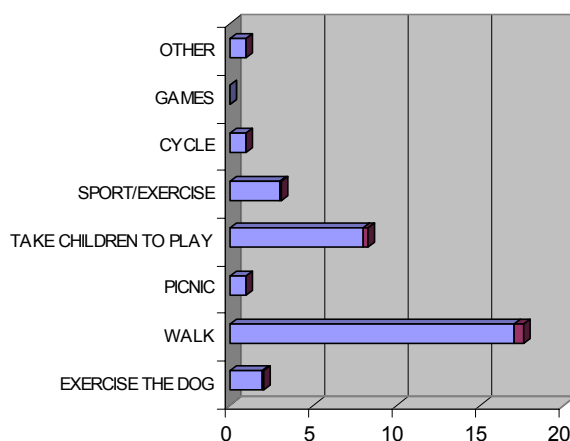


Figure 5.18 – Activities in Open Spaces

- 5.25 The questionnaire incorporated a number of questions aimed at identifying users' opinions in relation to the town environment. These views are summarised in Table 5.10.

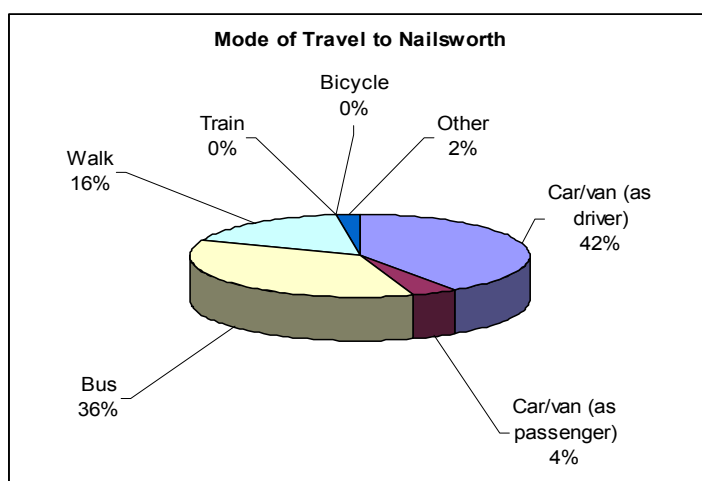
**Table 5.10 – Opinions relating to the Town Environment**

	Good		Average		Poor		Don't Know	
	No.	%	No.	%	No.	%	No.	%
Cleanliness	51	56.0	34	37.4	6	6.6	0	0
Benches	48	52.7	32	35.2	7	7.7	4	4.4
Litter Bins	43	47.3	29	31.9	9	9.9	10	11.0
Attractiveness	67	73.6	23	25.3	1	1.1	0	0
CCTV	1	1.1	0	0	16	17.6	74	81.3
Signage	45	49.5	38	41.8	2	2.2	6	6.6
Lighting	56	61.5	26	28.6	3	3.3	6	6.6

- 5.26 Table 5.10 reveals that in general terms, users consider the town environment to be in need of improvement, with around a third of all respondents rating cleanliness, provision of benches and litter bins and overall attractiveness, signage and lighting as average or poor. The results also suggest that there is a lack of awareness of CCTV in the town, 81.3% of respondents stating that they did not know whether there was any.
- 5.27 When questioned about whether they use the town at night, the majority (65.9%) said that they did not. Of the remaining 34.1% that stated that they do use the town in the evening, the main reasons cited were as follows (please note that respondents were permitted to select more than one answer):
- ◆ socialise 67.7% (21 respondents)
  - ◆ visit places to eat/drink 38.7% (12 respondents)
- 5.28 With regard to the majority of respondents that do not visit Nailsworth at night, the principal reasons (when a reason was given) were stated to be the following:
- ◆ the respondent does not go out after dark 40% (24 respondents)
  - ◆ Nailsworth is too far from the respondent's home 38.3% (23 respondents)
  - ◆ there is insufficient leisure and/or entertainment 18.3% (11 respondents)

**Table 5.11 – Mode of Transport to Nailsworth**

Mode	No. of Surveys	% of all Surveys
Car/van (as driver)	37	40.7%
Car/van (as passenger)	4	4.4%
Bus	33	36.3%
Walk	15	16.5%
Train	0	0.0%
Bicycle	0	0.0%
Other	2	2.2%

**Figure 5.19 – Mode of Transport to Nailsworth**

- 5.29 Table 5.11 and Figure 5.19 indicate that a significant proportion – over one third (36%) – travelled to the town by bus and a further 16% reached Nailsworth on foot, which is a positive indication in terms of promoting sustainable transport patterns. The most popular mode was, however, by car, either as a driver or a passenger (42% and 4% respectively). No respondents accessed the town centre by train or bicycle.
- 5.30 The age and gender profile of respondents should be considered as a possible reflection of some of the results – approximately two thirds of all respondents were female (65.9%). The age profile (Figure 5.20) indicates a higher representation of persons over the age of 55.

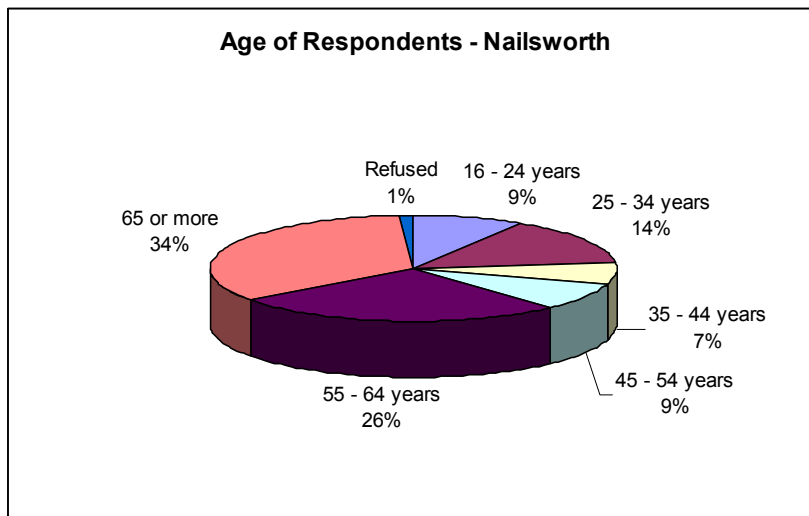
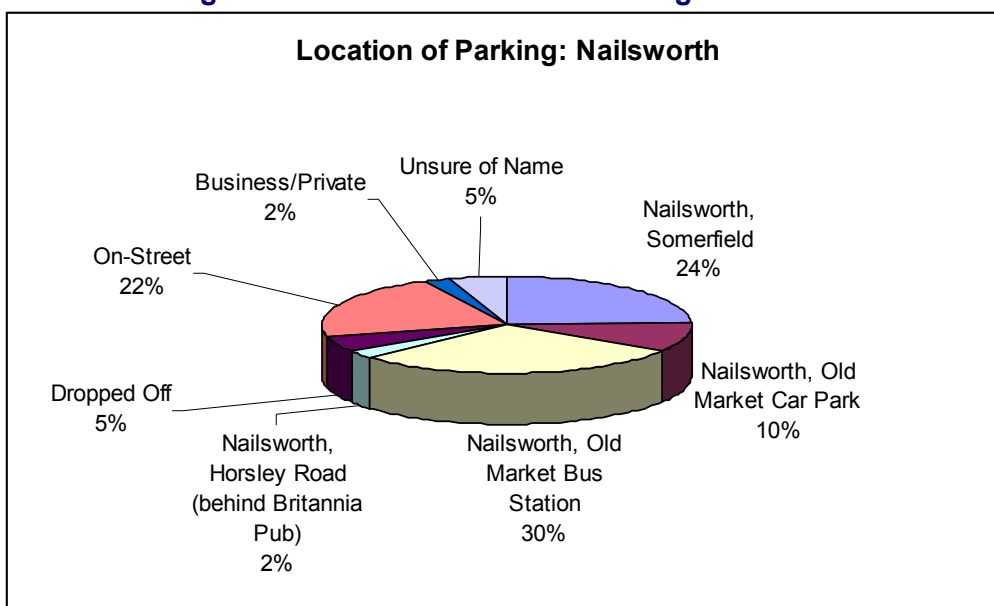


Figure 5.20 – Age of Respondents

5.31 With regard to those respondents that accessed the town by car, the breakdown of locations where they parked are detailed here, and illustrated in Figure 5.21:

- ◆ Nailsworth, Somerfield 10 persons
- ◆ Nailsworth, Old Market Car Park 4 persons
- ◆ Nailsworth, Old Market Bus Station 12 persons
- ◆ Nailsworth, Horsley Road (behind Britannia pub) 1 person
- ◆ Dropped Off 2 persons
- ◆ On-Street 9 persons
- ◆ Business/Private Car Park 1 person
- ◆ Unsure of Name 2 persons

Figure 5.21 – Location of Car Parking: Nailsworth



5.32 The data indicates that car drivers make use of a wide range of car parking 'spots' around the town, although there appears to be three favoured locations:

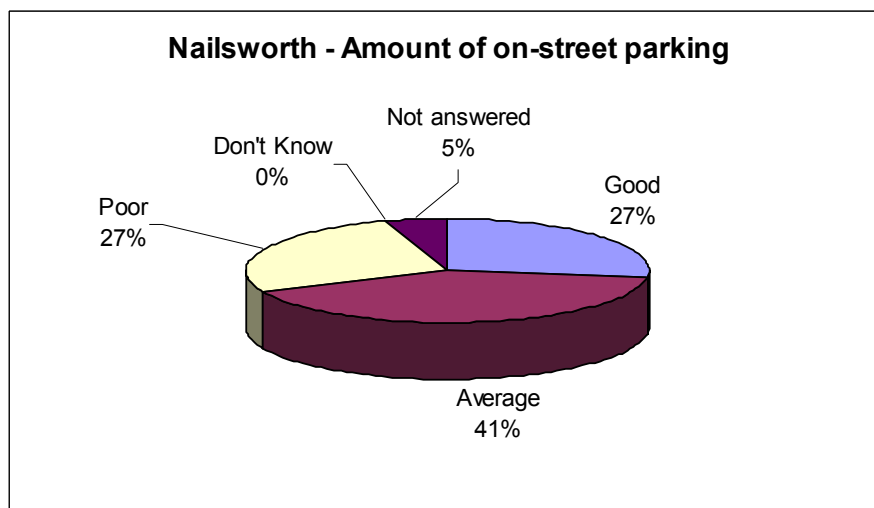
- ◆ Old Market Car Park (Bus Station) 29.3%;
- ◆ Somerfield 24.4%
- ◆ On-Street 22.0%

5.33 Table 5.12 and Figure 5.22 provide a breakdown of the overall opinions of respondents that stated that they had accessed the town by car, on the amount of on-street parking available in Nailsworth town centre. These indicate that the majority believe the amount of on-street spaces available to be either good (26.8%) or average (41.5%). However, over a quarter of users rated the amount of on-street parking as poor (26.8%).

**Table 5.12 - Amount of On-Street Parking Available: Nailsworth**

	No. of Surveys	%
Good	11	26.8%
Average	17	41.5%
Poor	11	26.8%
Don't Know	0	0.0%
Not answered	2	4.9%

**Figure 5.22 – Amount of On Street Spaces: Nailsworth**

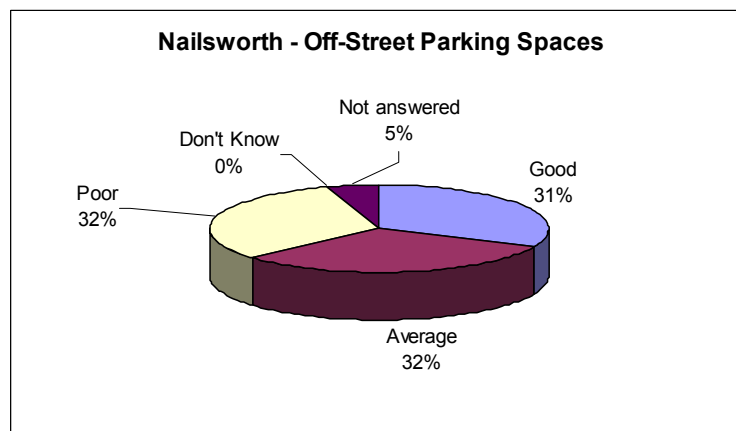


5.34 Table 5.13 and Figure 5.23 illustrate users' opinions regarding the amount of parking provision within designated car parks in the town. Opinion is clearly split, with good, average and poor each receiving 31.7% of the 'vote'. This may be a reflection of the different uses and duration of stay for each user, however it may also indicate that there is a need for more detailed study to ascertain the reason for this split of opinion.

**Table 5.13 – Amount of Spaces in Car Parks**

	No. of Surveys	%
Good	13	31.7%
Average	13	31.7%
Poor	13	31.7%
Don't Know	0	0.0%
Not answered	2	4.9%

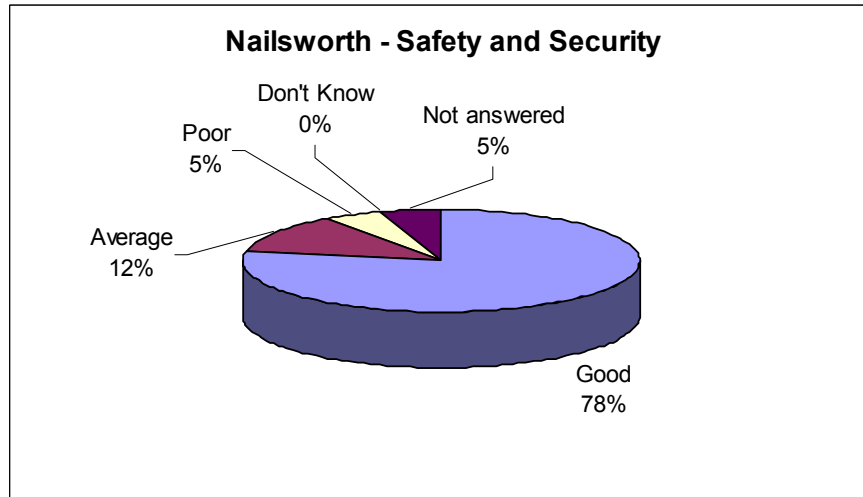
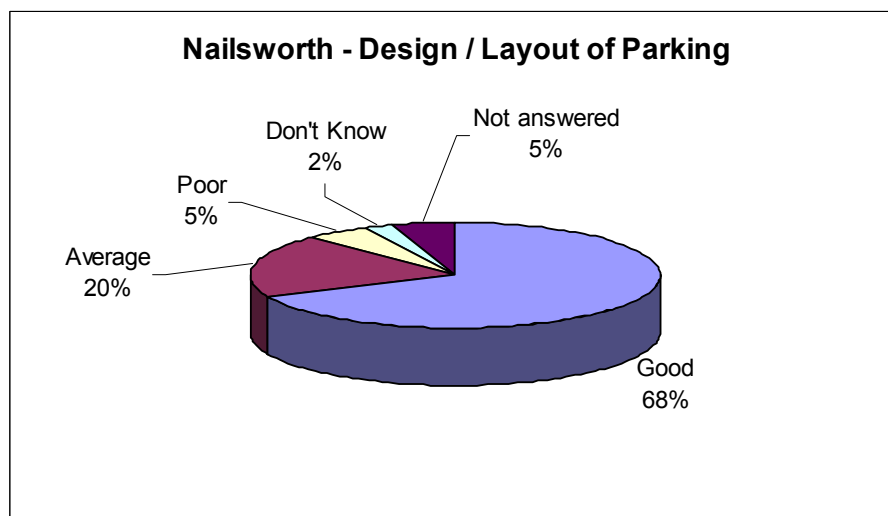
**Figure 5.23 – Amount of Spaces in Car Parks: Nailsworth**



5.35 User opinions on safety and security and the design and layout of car parks are provided in Table 5.14 and Figures 5.24 and 5.25 respectively.

**Table 5.14 – User Opinions on Safety and Security and Design and Layout of Car Parks: Nailsworth**

	Safety and Security		Design and Layout	
	No. Surveys	%	No. Surveys	%
Good	32	78	28	68.3
Average	5	12.2	8	19.5
Poor	2	4.9	2	4.9
Don't Know	0	0	1	2.4
Not Answered	2	4.9	2	4.9

**Figure 5.24 – Safety and Security of Car Parks: Nailsworth****Figure 5.25 – Design and Layout of Car Parks: Nailsworth**

- 5.36 It is very encouraging to note that the vast majority of users considered both safety and security; and design and layout of car parks in Nailsworth to be good (78% and 68%, respectively).
- 5.37 Figure 5.26 provides a breakdown of the home postcodes of respondents interviewed in Nailsworth town centre. This indicates that the vast majority of respondents were local to the area: almost two thirds (61.5%) lived in the GL6 (Stroud/Nailsworth) postal area; and a further fifth of respondents were from the GL5 (Stroud) postal district.

Figure 5.26 – Home Postcodes of Respondents

