

## **Car Parks Survey**

### **Report**

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**Prepared For: Stroud District Council**

Prepared By: **Future Focus Research**  
130 Aztec  
Aztec West  
Bristol  
BS32 4UB  
[www.futurefocusresearch.co.uk](http://www.futurefocusresearch.co.uk)

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# 1. Approach to research

## 1.1 Research objectives

Stroud District Council (Stroud DC) commissioned Future Focus Research to conduct a survey of local residents relating to car parks and its policies relating to car parks.

## 1.2 Methodology

A total of 301 ten minute telephone interviews were conducted with local residents. In order to ensure a good range of individuals were interviewed and to ensure that the survey was representative of the local area, quotas were set. In terms of area, we targeted a broadly equal number of interviews in each of the following local areas:

- Gloucester Border Areas
- Stroud Central
- Stroud Border Areas including Nailsworth
- Stonehouse
- Dursley
- Wotton-under-Edge
- Berkeley

These areas are grouped based on the Royal Mail post towns – see appendix A for details of the postcodes

In addition to the above, quotas were set on age and gender that reflected the population of Stroud DC as a whole.

Finally, an informal quota was set on those without access to a vehicle to try and capture the views of this additional sub-group of local residents.

A questionnaire was designed in conjunction with Stroud DC to ensure it was able to deliver the intended objectives of the research. Interviews were conducted by a team of trained interviewers.

A sample size of 301 gives a margin of error of +/-5.6% at the 95% confidence interval. Therefore, if 50% of respondents give an answer to a question, we can be sure that the true value lies somewhere between 44.4 and 55.6%.

### 1.3 Who did we interview?

A total of 301 interviews were achieved. Table 1.1 summarises who was interviewed in terms of age, gender and local area.

**Table 1.1: Summary of completed interviews**

<b>Segment</b>	<b>Number of interviews</b>
<i>Gender</i>	
Female	157
Male	144
<i>Age</i>	
16-34	59
35-54	113
55+	129
<i>Area</i>	
Gloucester Border Areas	43
Stroud Central	43
Stroud Border Areas	43
Stonehouse	43
Dursley	41
Wotton-under-Edge	44
Berkeley	44

## 2. Policy

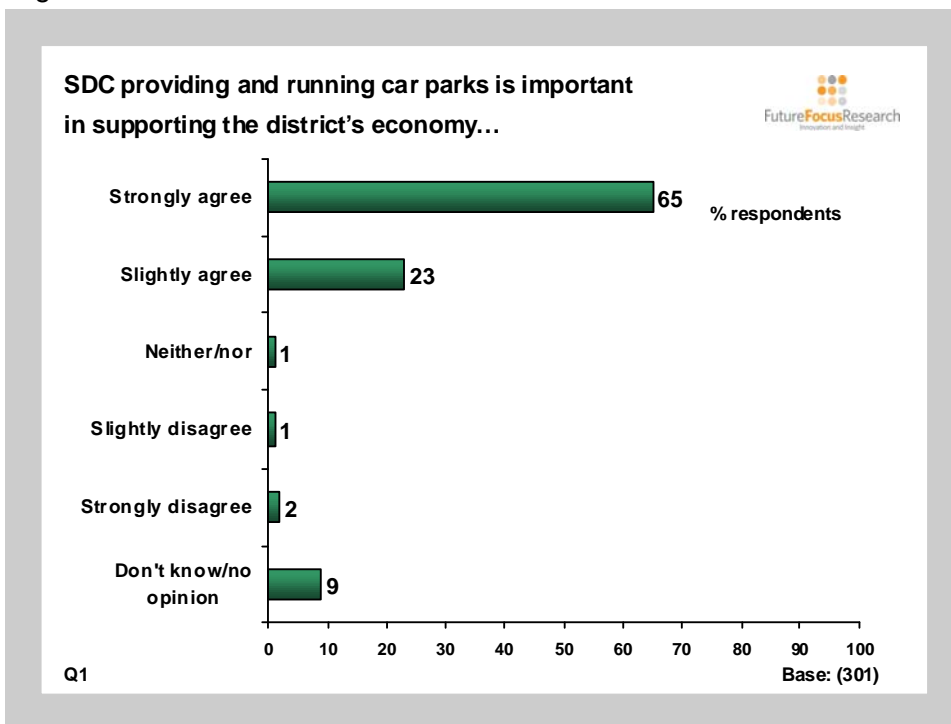
This section examines the following:

- Policy concepts and funding;
- Management of car parks;
- Prioritising user groups; and
- Parking charges.

### 2.1 General policy concepts and funding

Figure 2.1 illustrates the views of respondents in terms of the importance attached to Stroud DC running the car parks.

Figure 2.1



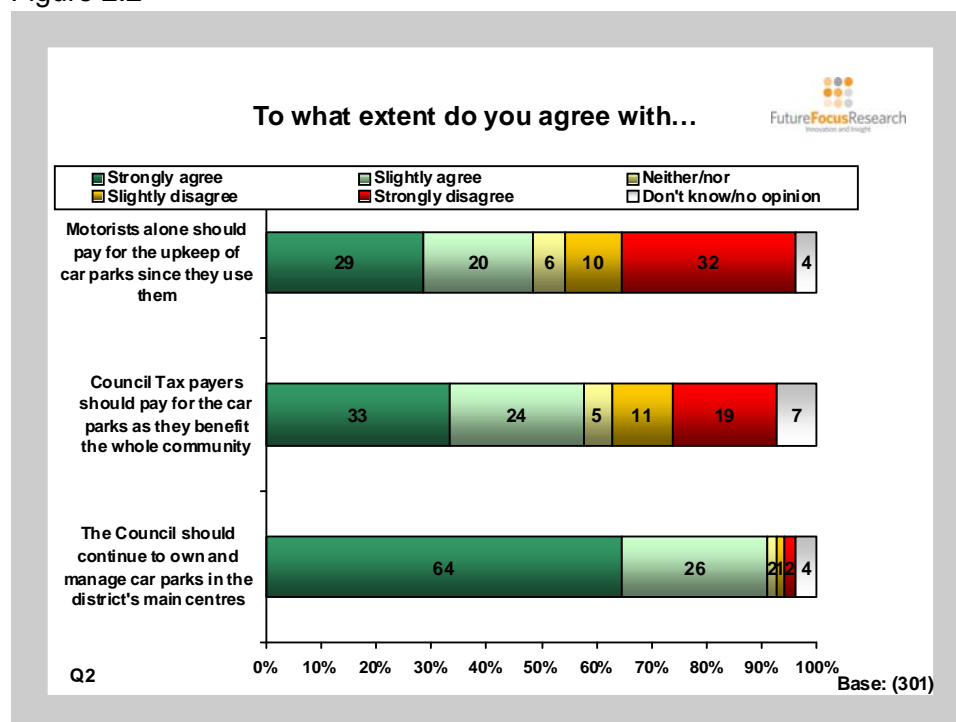
This demonstrates that the majority of local residents (65%) strongly agreed that the running and provision of car parks by Stroud DC is important in supporting the district's economy. Indeed, a total of 88% agreed with this statement to some extent (slightly agree and strongly agree combined). This was reflected in each of the 7 local areas, although the following variations were noted:

- Gloucester Border Areas: whilst the majority strongly agreed (54%) a high proportion (42%) responded 'don't know';
- Stonehouse: The extent to which respondents agreed was different with 16% strongly agree and 77% slightly agree.

There were no variations in opinion according to demographics or access to a vehicle.

Figure 2.2 examines respondents views on the funding the car parks in Stroud district. As outlined, respondents indicated the extent to which they agree to three statements.

Figure 2.2



The above chart demonstrates that the majority of respondents agreed that the *Council should continue to own and manage car parks in the district's main centres* (90% agreement). This was reflected in each of the 7 local areas and across all other variables.

Whilst a majority of respondents (58%) agreed that *Council Tax payers should pay for the car parks as they benefit the whole community*, it should be noted that 31% of respondents also disagree to some extent with this statement. The following variations were noted according to different subgroups of the population:

- Gloucester Border Areas: a majority (58%) disagreed with the assertion that Council Tax payers should pay for car parks, with only 33% of respondents agreeing.
- Stroud Border Areas and Wotton-under-Edge: Compared to the average agreement (58%), a higher proportion of respondents (both 68%) were in agreement with this statement.
- Those without access to a vehicle were less likely to agree (44%) that Council Tax payers should pay for car parks compared to 59% of those with access to a vehicle.

Figure 2.2 illustrates that opinions varied in terms of the assertion that *'motorists alone should pay for the upkeep of car parks since they use them'*. Although 49% agreed with the statement, 42% disagreed. The following variations were noted:

- Gloucester Border Areas: a higher proportion of respondents (58%) agreed that motorists alone should pay compared an average agreement of 49%.
- Wotton-under-Edge: This was the only area where a majority (66%) disagreed that motorists alone should pay.
- Access to a vehicle: Those without access to a vehicle were more likely to agree (59%) that motorists alone should pay compared to 48% of those with access to a vehicle. Furthermore, 24% of those without access to a car disagreed with this assertion compared to 44% of those with access to a vehicle.

## 2.2 Management of car parks

### Car parks in particular areas

Table 2.1 illustrates whether respondents felt that car parks in particular areas should be owned/managed by Stroud DC.

**Table 2.1 Should Stroud DC own/manage car parks in the following areas**

Area	Yes	No	Don't know
Stroud	87	1	12
Stonehouse	81	4	15
Nailsworth	80	5	15
Cainscross	77	4	19
Dursley	75	6	19
Minchinhampton	75	6	19
Painswick	75	6	19
Kings Stanley	74	5	21
Wotton-under Edge)	72	7	21
Cam	71	7	22
Berkeley	66	8	26

As illustrated, for each area identified the majority of respondents felt that Stroud DC should own/manage car parks. However, there was some variation from 87% indicating 'yes' for car parks in Stroud to 66% in Berkeley.

There was some variation in views according to local area. In all sampled areas (except those detailed below), the majority of respondents felt the same about each of the areas (i.e. that they should own/manage car parks in the areas mentioned). However, the following slight variations were noted:

- Respondents in Stroud Central were less likely to agree that Stroud DC should own/manage car parks in the following areas: Dursley, Painswick, Wotton-under Edge, Cam, Berkeley (in Stroud Central a higher proportion responded 'No' and/or 'don't know').
- Respondents in Gloucester Border Areas were less likely to agree that Stroud DC should own/manage car parks in Berkeley.

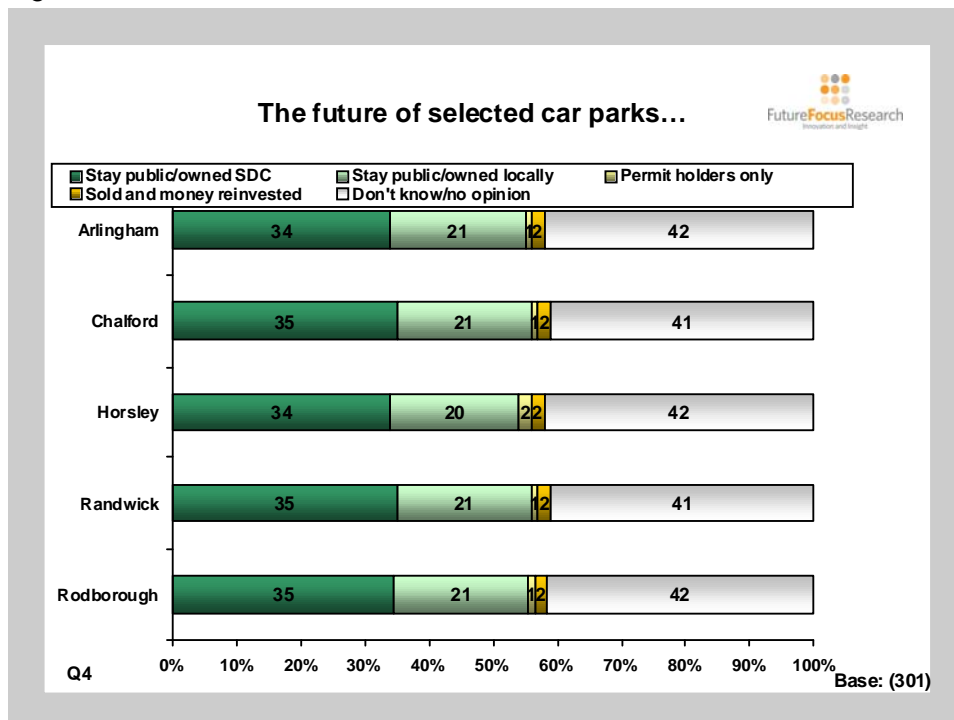
Similar views were expressed by the different demographic sub-groups. In terms of age although in each age group a majority felt that each car park should be owned/managed

by Stroud DC, as age increased the proportion responding 'don't know' increased, suggesting the younger two age groups had 'firmer' ideas regarding who should manage car parks in these areas.

### Car parks in specific locations

Figure 2.3 demonstrates that for each of the five specific car parks identified, whilst approximately 40% responded 'don't know', about a third of respondents felt that they should remain as publicly owned by Stroud DC and a further 20% (approximately) felt the car parks should stay publicly owned more locally (e.g. Parish Council).

Figure 2.3



The following were noted following a review of the answers given by local area:

- The majority of respondents in Stroud Central indicated that each of the 5 car parks mentioned should stay as a public car park but owned locally (e.g. by a Parish Council).
- Most respondents (approximately 40%) in Stonehouse felt that each of the 5 car parks should stay as a public car park but owned locally (e.g. by a Parish Council).

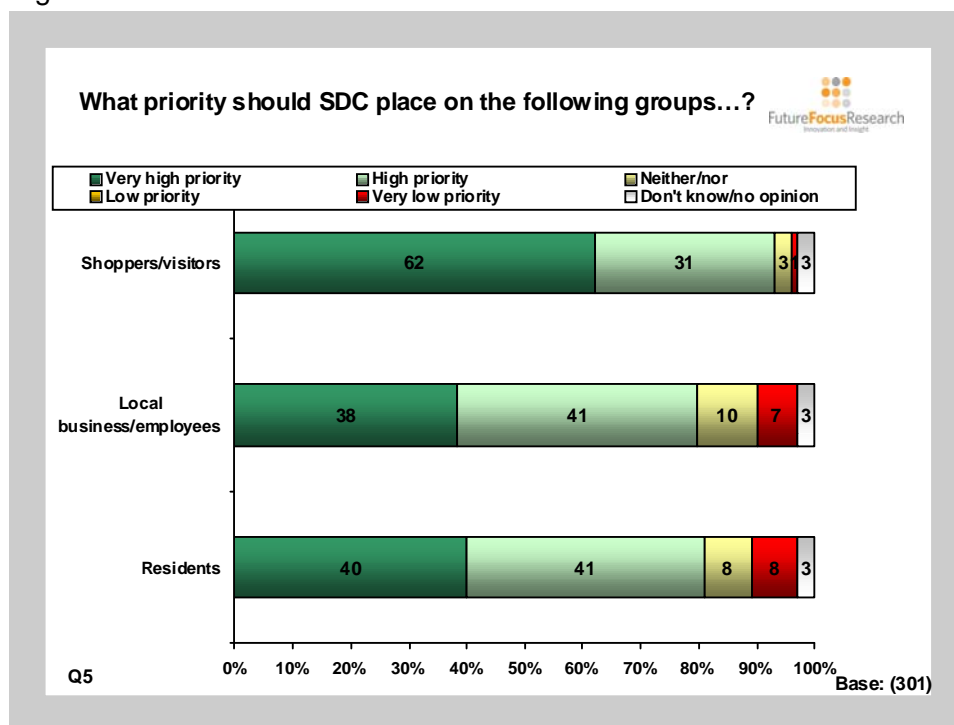
## 2.3 Prioritising user groups

This section examines which group(s) Stroud DC should prioritise in its management of car parks out of the following groups:

- Shoppers/visitors;
- Local businesses and their employees; and
- Residents.

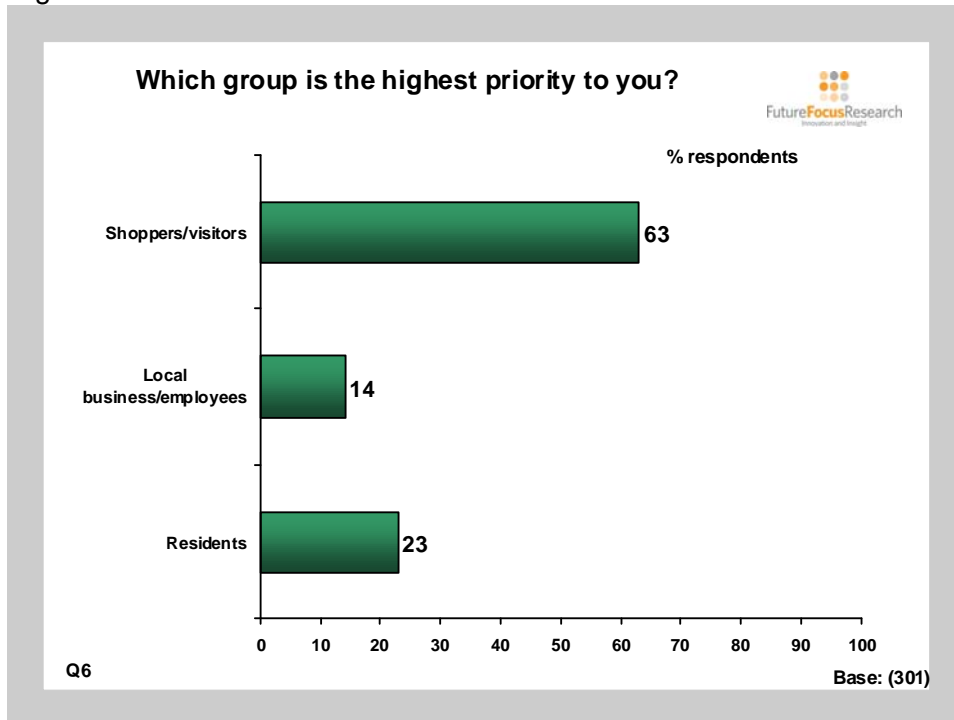
Figure 2.4 demonstrates that the majority of respondents felt that each of the three groups should be a priority (very high or high) of the Council in formulating the management of its car parks. However, it was only for the 'shoppers/visitors' group that a majority of respondents felt should be a 'very high priority'.

Figure 2.4



Respondents were also given the opportunity to state which of the three groups was the highest priority, and the responses are highlighted in Figure 2.5. This demonstrates that local residents in Stroud DC perceive that Stroud DC should prioritise shoppers/visitors.

Figure 2.5

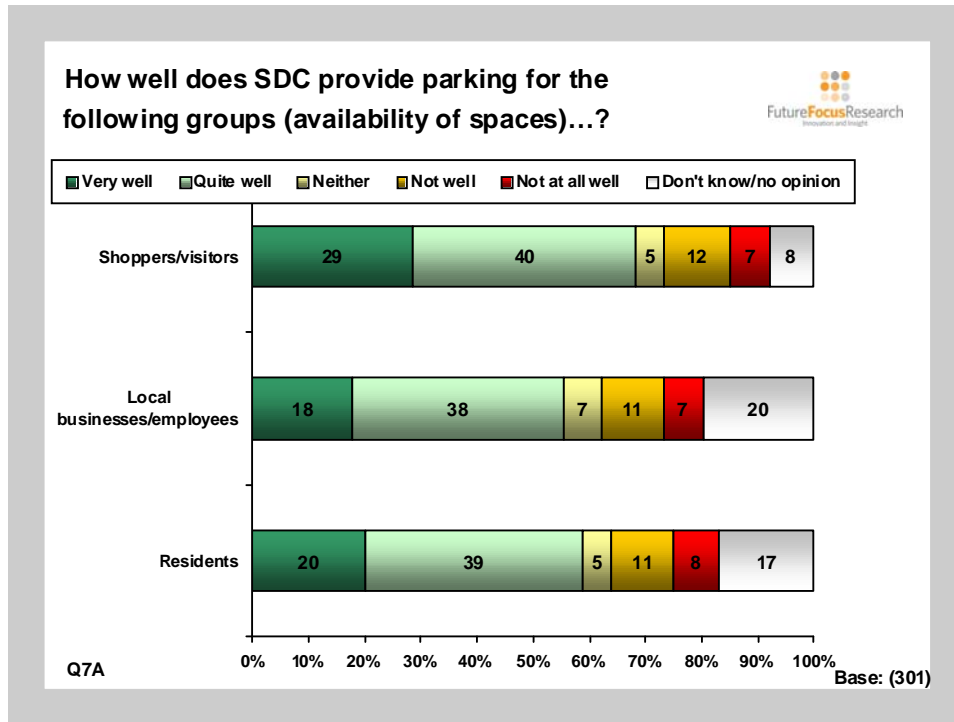


The following variations were noted:

- Dursley was the only area where a majority of respondents did not make 'shoppers/visitors' their main priority. The actual figure was 42% with an equal proportion of respondents mentioning Local business/employees (29%) and Residents (29%).

Figure 2.6 illustrates how well respondents feel that Stroud DC provides parking for each of the three user groups identified in terms of availability of spaces.

Figure 2.6



The following variations were noted:

- Shoppers/visitors: Respondents in Wotton-u-Edge were less likely than all other areas to perceive that Stroud DC performed well in terms of availability of spaces for shoppers.
- Local businesses/employees: Respondents in Gloucester Borders and Stroud Central were less likely to perceive that Stroud DC performed well in terms of availability of spaces for local business/employees. Indeed, in Stroud Central, 30% of respondents indicated that they did not feel that Stroud DC performed well.
- Local business/employees: Respondents in Stroud Border Areas and Berkeley were more likely to perceive Stroud DC to perform well in terms of availability of spaces for business/employees (65% and 82% respectively) compared to an average of 56%.
- Residents: Respondents in Gloucester Borders and Stroud Central were less likely to perceive that Stroud DC performed well in terms of availability of spaces for residents. Indeed, in Stroud Central, 37% of respondents indicated that they did not feel that Stroud DC performed well.
- Residents: Respondents in Stroud Border Areas, Stonehouse and Berkeley were more likely than all other areas to perceive Stroud DC to perform well in terms of availability of spaces for residents (67%, 68% and 80% respectively) compared to an average of 59%.

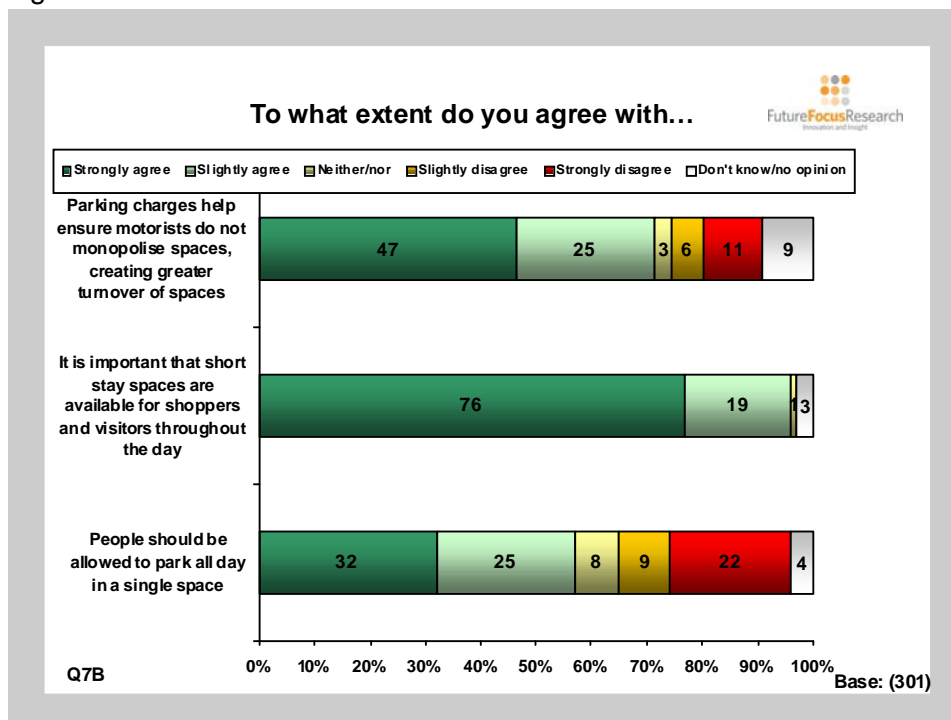
## 2.4 Parking charges

This section examines respondent views on:

- The role of charges in managing turnover of spaces;
- The extent to which charges in some car parks should be used to fund other car parks;
- The introduction of parking charges

### Role of charges/turnover of spaces

Figure 2.7



As shown in Figure 2.7 the majority of respondents agree (96%) that it is important that short stay spaces are available for shoppers and visitors throughout the day. Furthermore, 76% indicated that they 'strongly agree' with this statement. This further demonstrates the priority that local residents put on the parking requirements of shoppers and visitors. This trend was reflected in each of the 7 local areas.

It is also noticeable that the majority of respondents (72%) agree that parking charges help ensure motorists do not monopolise spaces and create greater turnover of spaces. The following variations were noted in terms of the local areas:

- Compared to an average of 72% agreement, a higher proportion of respondents agreed with this assertion in Gloucester Borders Area and Stroud Central (95% and 88% respectively). By contrast, the comparative proportions agreeing in Stroud Border Areas (56%), Dursley (59%) and Wotton-u-Edge (57%) were notably lower.

A smaller majority (57%) agree that motorists should be allowed to park all day in a single space. However, 31% disagree with this statement. The following variations were noted according to local areas:

- Compared to an average of 57% agreement, a higher proportion of respondents agreed with this assertion in Gloucester Border Areas (86%) and Stroud Central (70%). By contrast respondents in Wotton-u-Edge (41%) and Berkeley (41%) were less likely to agree that motorists should be allowed to park all day.

The above demonstrates some interesting findings: In those areas where there is a higher level of agreement that parking charges assist in creating a turnover of spaces, there is also a higher proportion of agreement that motorists should be allowed to park all day in a single space.

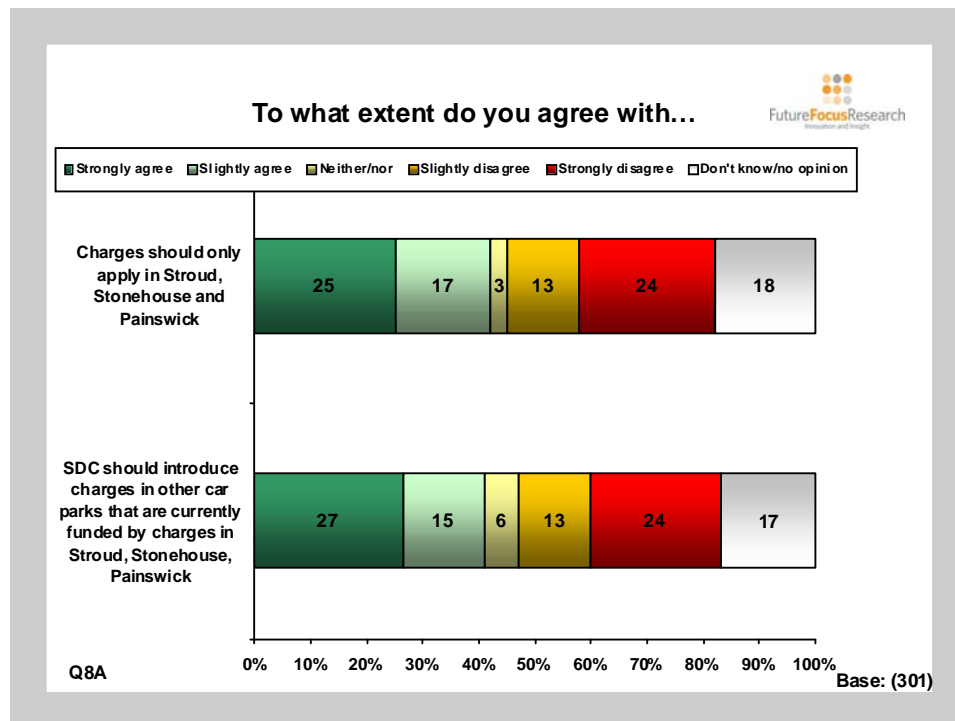
A review of the above statements according to demographics highlighted the following:

- As the age of respondents increased, there was a reduction in the proportion agreeing that motorists should be able to park all day in a single space: i.e. younger respondents felt this parking behaviour was acceptable, whilst older sections of the community felt the opposite.

### Use of charges to fund other car parks

Figure 2.8 examines respondent views on the use of charges in some car parks to fund the costs of other car parks where there is currently no charge for motorists.

Figure 2.8



As illustrated in Figure 2.7 there were similar levels of agreement (42% agreement) with both statements. In terms of the assertion that charges should only apply in Stroud, Stonehouse and Painswick, the following variations were noted:

- There were higher levels of disagreement in Gloucester Borders Area (51%) and Wotton-u-Edge (48%) compared to an average of 37%.
- Respondents in Dursley were more likely to agree (73%) that charges should only apply in Stroud, Stonehouse and Painswick.

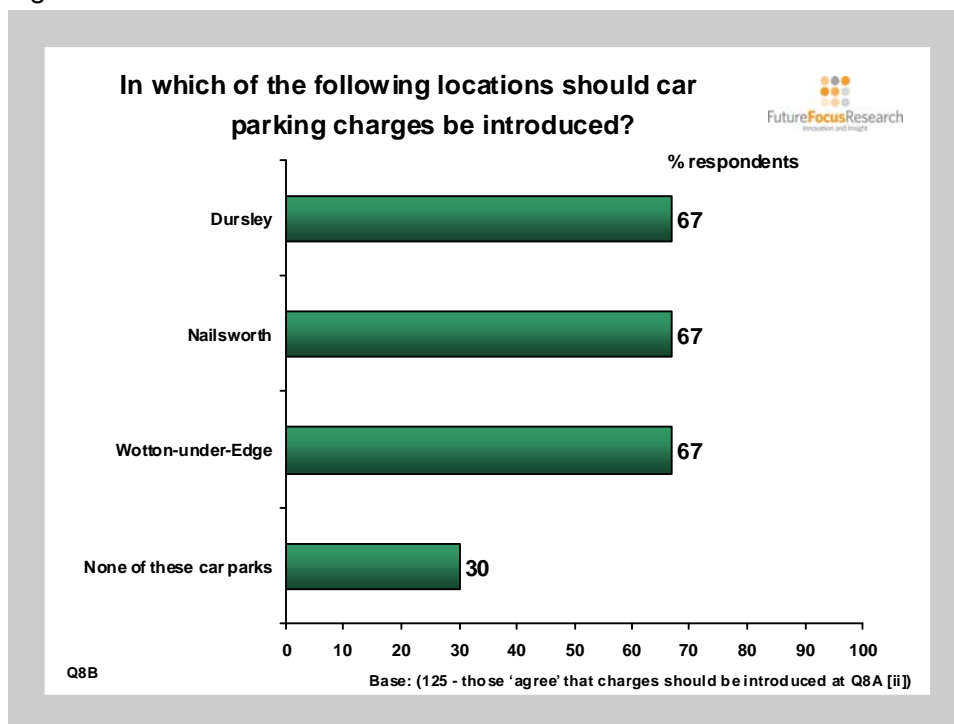
Respondent views on the introduction of charges in other car parks currently funded by charges from Stroud, Stonehouse and Painswick varied by local area as follows:

- In Gloucester Borders Area (54%) and Stroud Central (51%), a higher proportion of respondents agreed that charges should be introduced compared to an average agreement of 42%; and
- Respondents in Dursley (49%) and Wotton-u-Edge (55%) were more likely to disagree that charges should be introduced in other car parks.

A review of the above statements by demographics did not highlight any particular trends suggesting that the differing views were very much a result of the location of respondents.

Of those respondents who agreed (either strongly or slightly) that charges should be introduced in other car parks that are currently funded by charges from Stroud, Stonehouse and Painswick, the research examined which of the following car parks respondents felt charges should be introduced: Dursley; Nailsworth and Wotton-under-Edge.

Figure 2.9

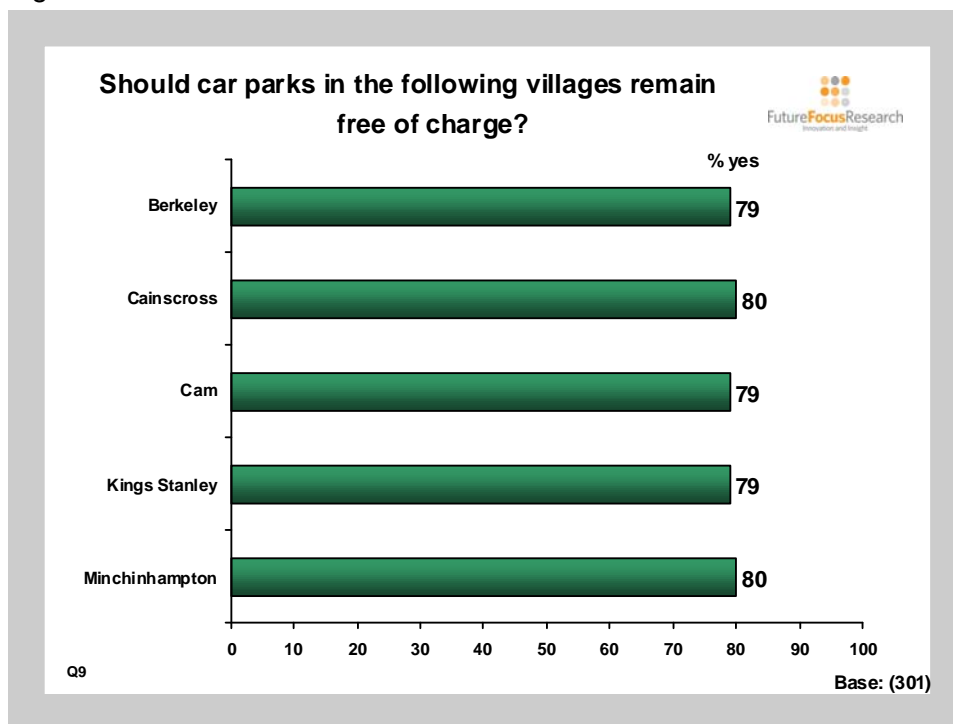


As outlined above, of those who felt charges should be introduced, it was felt that the introduction should not discriminate between locations. As such, respondents felt that charges should be introduced in all locations and not just in particular car parks. This is further underlined by some of the qualitative comments given by respondents relating to consistent charges across the District.

### Towns/villages with low shopper/visitor numbers

From a list of 5 villages with smaller retail centres (and lower visitor/shopper numbers) respondents were asked to indicate whether the car parks in the villages should remain free of charge. The results are illustrated in Figure 2.9, demonstrating that for each village, the majority of respondents felt that the car parks should remain free of charge.

Figure 2.10



For each of the villages identified the following trends emerged:

- Respondents in Gloucester Border Areas were less likely to indicate that the car parks should remain free of charge (61% for all named villages) compared to an average of 79%. Indeed, 33% felt that charges should be introduced compared to an average of 16%.
- Respondents in Stroud Border Areas (91%), Dursley (98%) and Berkeley (91%) were more likely to indicate that the car parks should remain free of charge compared to an average of 79%.

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A total of 48 respondents (16%) felt that charges should be introduced in at least one of the named villages. The reasons given for thinking charges should be introduced were as follows:

- Charges should be consistent across the District (63%; 30 respondents)
- To pay for upkeep of car parks (17%; 8 respondents)
- Charge for car parks to encourage public transport use (6%; 3 respondents)

**The following are a selection of verbatim comments from respondents, in response to the question: ‘Why do you think Stroud District Council should introduce charges?’**

*“To pay for their upkeep”*

*“Because they have to be maintained too- not fair that people should pay to maintain them by parking in other areas.”*

*“It shouldn't be much, but the charges should be spread out a bit.”*

*“Make car parks more expensive and get people walking or using public transport.”*

*“If they're going to charge anyone they should charge everyone - not fair otherwise.”*

*“It would be fairer and people wouldn't take advantage of free car parking space.”*

*“All car parks should charge a fee but this should only be to decrease the higher cost of some car parks in other areas.”*

*“Because we need to share the burden of car parking charges.”*

*“To keep it fair, so everyone pays the same and keeps costs down.”*

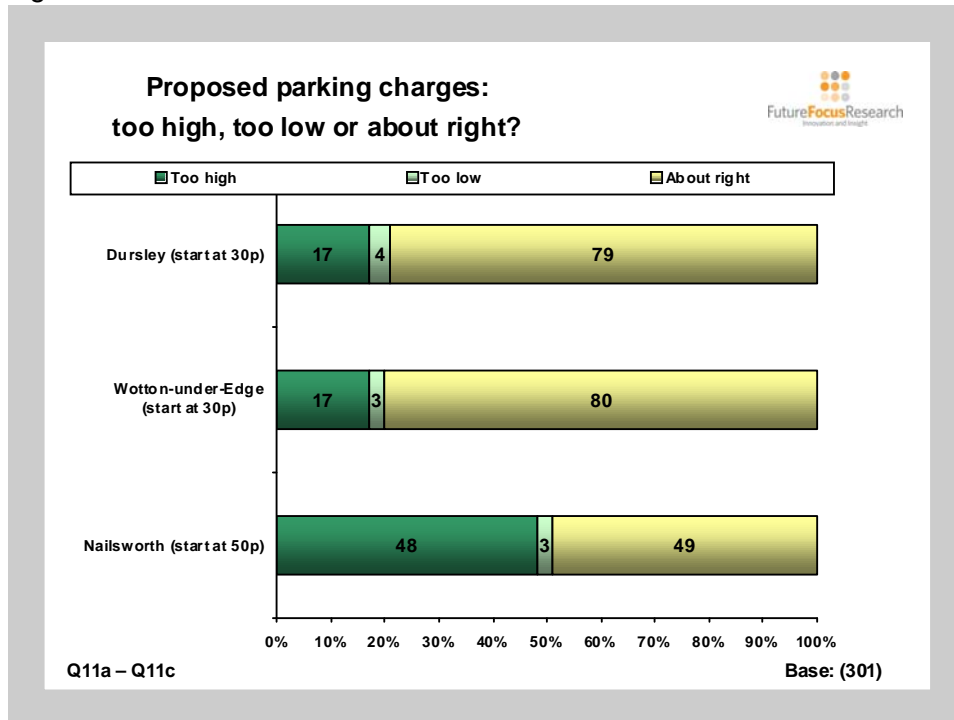
*“Parking charges should be consistent throughout the district.”*

### Proposed parking charges

Figure 2.11 illustrates respondent views on the proposed introduction of parking charges in the following locations:

- Dursley (starting at 30p per hour);
- Wotton-under-Edge (starting at 30p per hour); and
- Nailsworth (starting at 50p per hour).

Figure 2.11



As outlined, the proposed parking charges in Dursley and Wotton-under-Edge (both starting at 30p per hour) were viewed as ‘about right’ by the majority of respondents. However, respondent views were split on the proposed charge in Nailsworth (50p per hour).

#### *Dursley and Wotton-under-Edge*

A higher proportion of respondents in Stroud Border Areas (95%) felt that the charges were about right. Although a majority of respondents in Dursley and Wotton-under-Edge still felt the charges were ‘about right’, a higher proportion (than all other areas) felt that the charges were too high: 37% of respondents in Dursley (in relation to both car parks) and in Wotton-under-Edge (30% of respondents in relation to Dursley and 34% in relation to Wotton-under-Edge).

#### *Nailsworth*

In Gloucester Border Areas (74%), Dursley (61%) and Berkeley (80%) respondents were more likely to feel that the proposed fee was about right, compared to an average of 49%. However, in Stroud Border Areas (79%) and Wotton-under-Edge (68%) respondents were more likely to feel that the proposed charge was too high compared to an average of 48%.

### 3. Car Park Usage

This section examines the parking behaviour of those respondents who have access to a motor vehicle. Therefore, a maximum of 267 respondents answered the questions analysed in this section of the report.

This section examines:

- The extent to which different car parks are used
- Reasons for use
- Length of stay
- Importance of car park attributes

#### 3.1 Overview

The following three figures (Figures 3.1-3.3) illustrate the frequency of use of different car parks in the District.

Figure 3.1

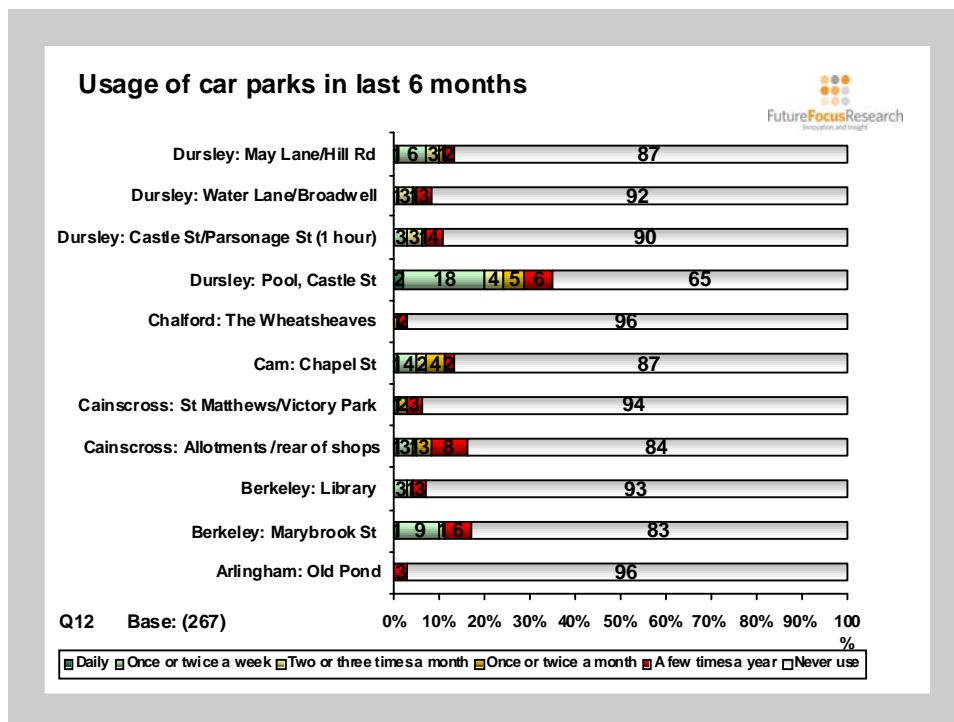


Figure 3.2

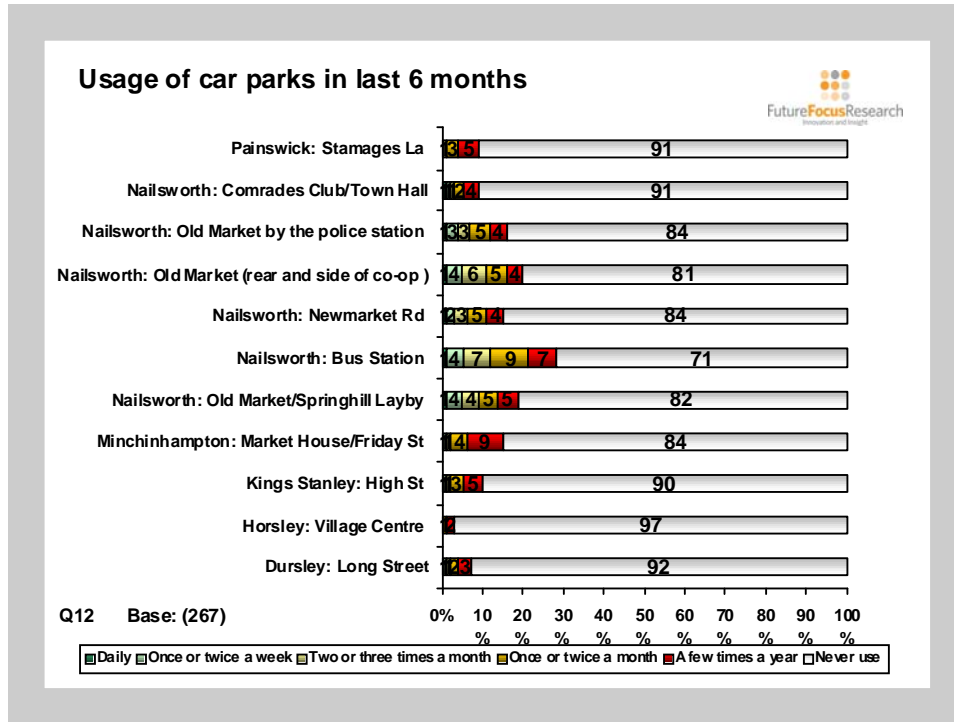
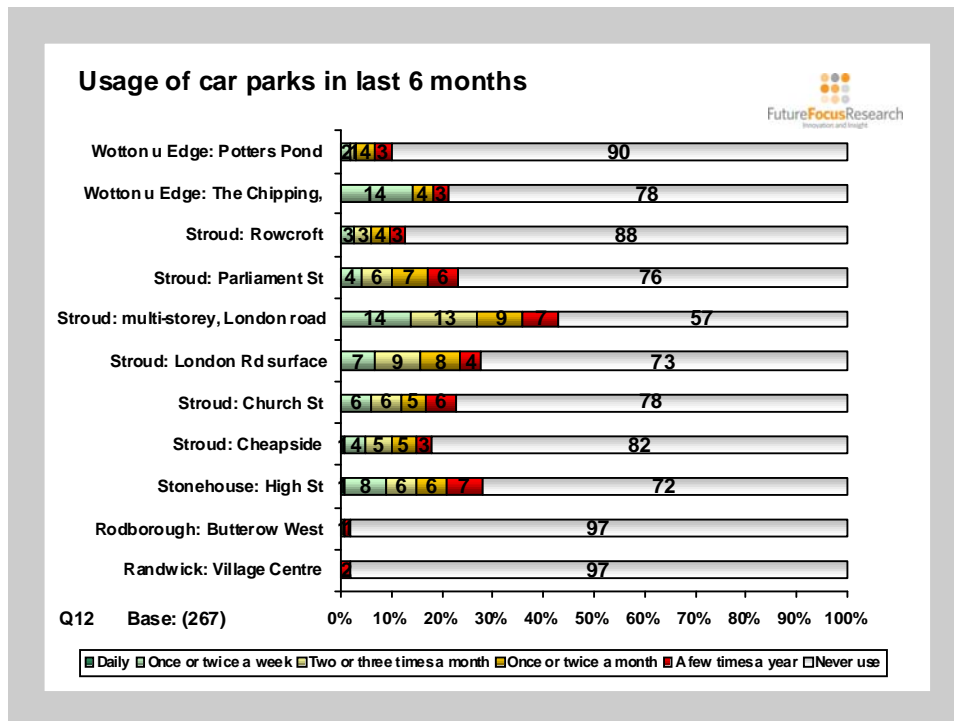


Figure 3.3



The above three charts illustrate that the most frequently used car parks are:

- Stroud: Multi-storey, London Road;
- Dursley: Pool, Castle Street;
- Nailsworth: Bus station;
- Stonehouse: High street; and
- Stroud: London surface.

Table 3.1 below illustrates which car park respondents used most often.

Car Park	% most often	Car Park	% most often
Wotton under Edge: The Chipping	15	Nailsworth: Old Market by the police station	1
Dursley: Pool, Castle St	14	Painswick: Stamages La	1
Stroud: multi-storey, London road	13	Cainscross: Allotments /rear of shops	1
Stonehouse: High St	10	Cam: Chapel St	1
Berkeley: Marybrook St	10	Minchinhampton: Market House/Friday St	1
Stroud: London Rd surface	6	Nailsworth: Old Market/Springhill Layby	1
Stroud: Church St	4	Stroud: Rowcroft	1
Stroud: Cheapside	4	Cainscross: St Matthews/Victory Park	1
Nailsworth: Old Market (rear and side of co-op )	3	Berkeley: Library	0.4
Nailsworth: Bus Station	3	Dursley: Castle St/Parsonage St (1 hour)	0.4
Stroud: Parliament St	3	Dursley: Water Lane/Broadwell	0.4
Dursley: May Lane/Hill Rd	1	Dursley: Long Street	0.4

Figure 3.4 outlines the reasons for using the car park most frequently cited by respondents. The main reasons were shopping related.

Figure 3.4

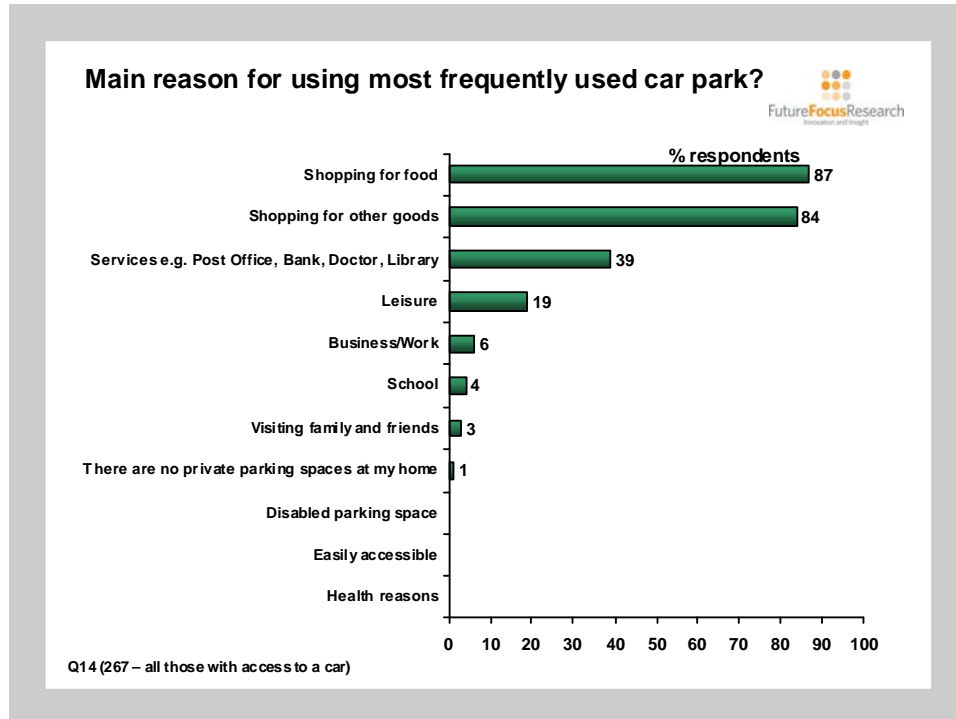
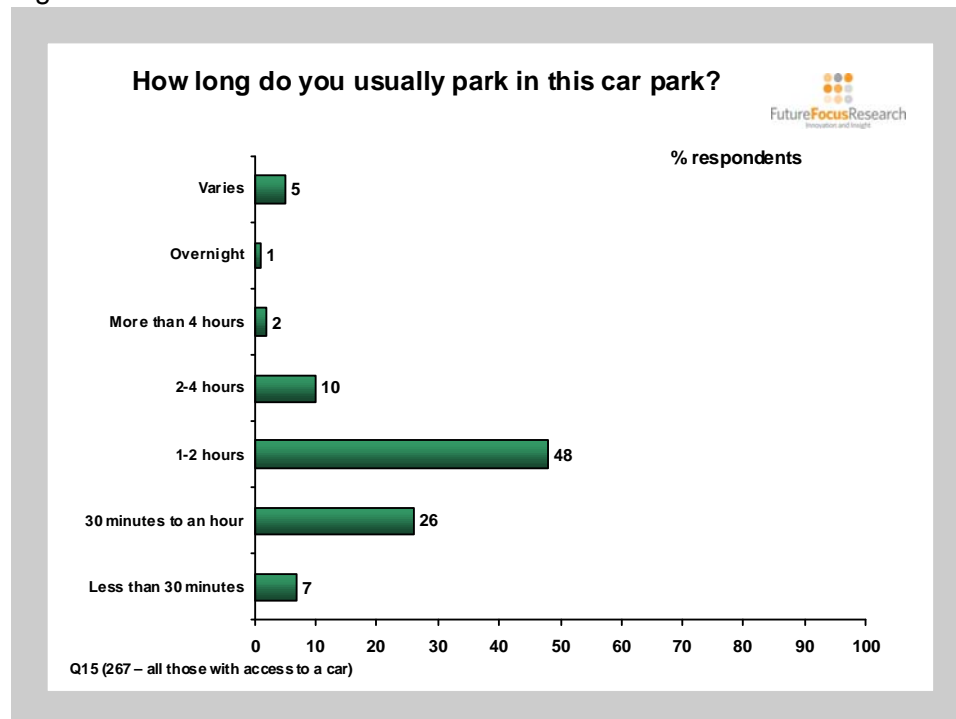


Figure 3.5 summarises the typical length of stay in the car park.

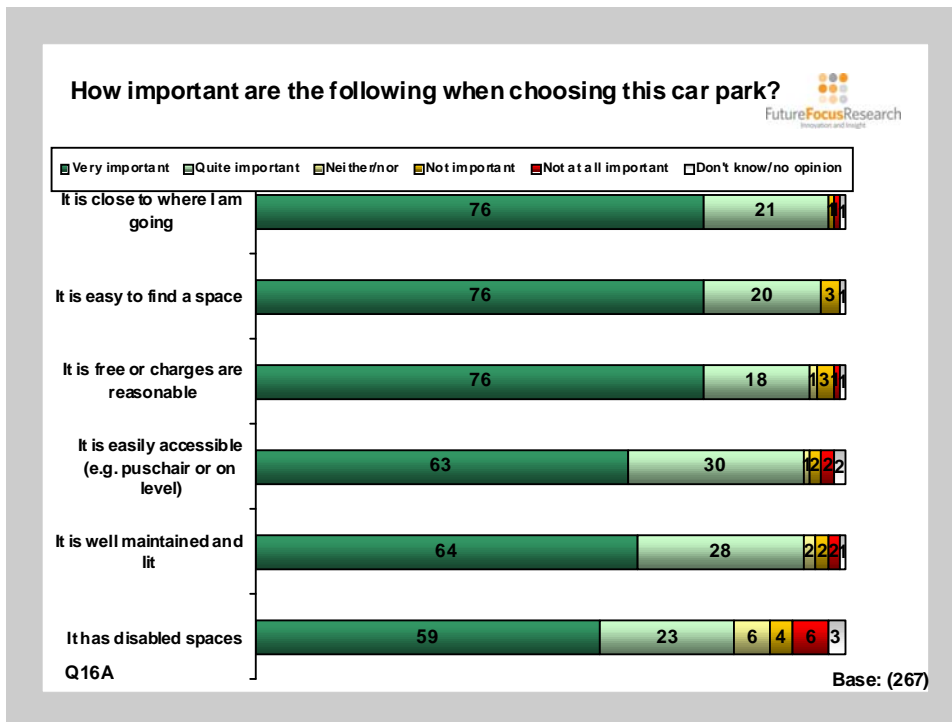
Figure 3.5



The most frequently cited length of stay was 1-2 hours and then 30 minutes to an hour.

Figure 3.6 summarises the importance attached to different car park attributes.

Figure 3.6



As illustrated, most of the car park attributes mentioned to respondents were deemed important. In terms of those that were perceived to be 'very important', the three key factors were:

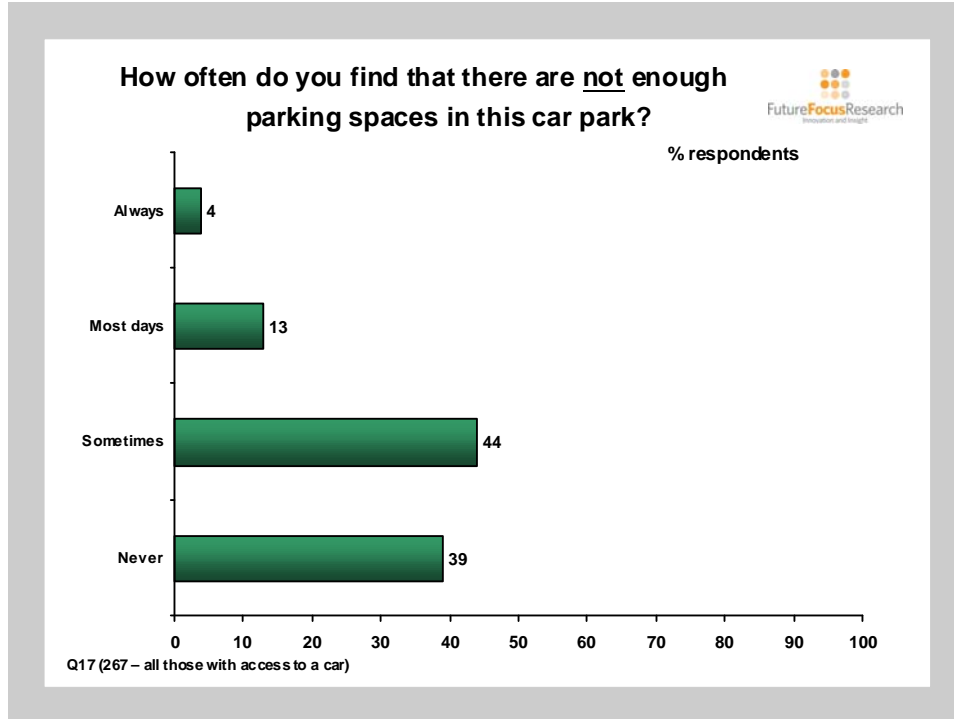
- Proximity of car park to final destination;
- Ease of finding a space; and
- That it is free or has reasonable charges.

The following other attributes were also noted as important in deciding where to park:

- Wider parking spaces (4%)
- Better access to car parks (3%)
- Cost (3%)
- Security (3%)
- Bigger car parks (2%)
- Toilets (1%)
- Nothing (84%)

In terms of availability of spaces, Figure 3.7 indicate that in the majority of car parks, respondents either 'never' or just 'sometimes' find that there are not enough spaces.

Figure 3.7



### 3.2 Specific car parks

Owing to small base sizes, it was not appropriate to analyse each individual car park separately. Therefore, the following analysis focuses on the following 5 car parks, where at least 25 respondents cited it as being the car park they used most often:

- Wotton under Edge: The Chipping
- Dursley: Pool, Castle St
- Stroud: multi-storey, London road
- Stonehouse: High St
- Berkeley: Marybrook St

#### Reasons for use

The reasons for use were similar in each of the main 5 car parks: shopping for food or shopping for other goods. Compared to the other car parks, users of the Dursley (Pool, Castle St) car park were more likely to state 'services (e.g. post office, bank etc) as a reason for using the car park. In contrast to other car parks, respondents using Wotton-under-Edge (The Chipping) were more likely than users of other car parks to state 'leisure' as a reason for using the car park.

### Length of stay

The most common length of stay mentioned for each of the car parks was as follows:

- Wotton under Edge: The Chipping: 51% 30 mins - 1 hour
- Dursley: Pool, Castle St: 54% 30 mins – 1 hour
- Stroud: multi-storey, London road: 69% 1 – 2 hours
- Stonehouse: High St: 54% 1 – 2 hours
- Berkeley: Marybrook St: 27% 1 – 2 hours

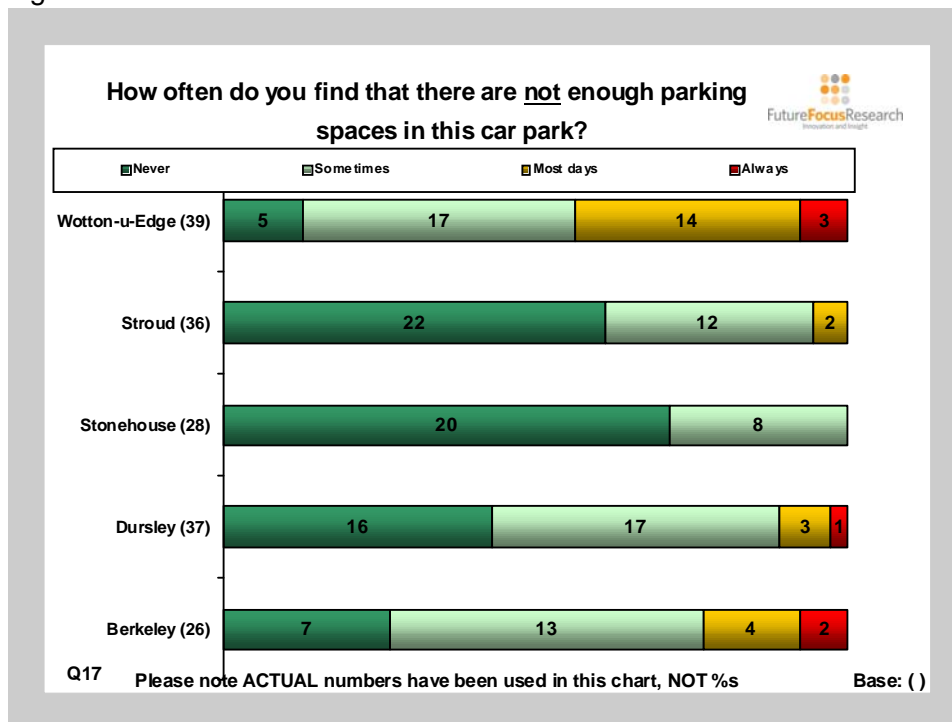
The car park in Berkeley attracted a greater variety of car parking sessions in terms of length of stay.

### Importance of attributes

The importance attached to the different factors that might govern choice of a car park was similar for all car parks.

Figure 3.8 examines the extent to which respondents found there not to be enough spaces in the car park they most frequently use. Please note that owing to the small base sizes the figures in the chart are ‘actuals’ and not percentages.

Figure 3.8



This suggests that respondents experienced particular difficulty finding (‘most days’ or ‘always’ not enough spaces) spaces in Wotton-under-Edge and Berkeley.

In order to gain more insight into the perceived availability of spaces in different locations, the car parks were grouped in terms of which town/village they were located in.

Please note that percentages have been used in Figure 3.9, but some of the base sizes are low and therefore such findings should be treated with caution. The total response has been included to enable comparisons to be made.

Figure 3.9

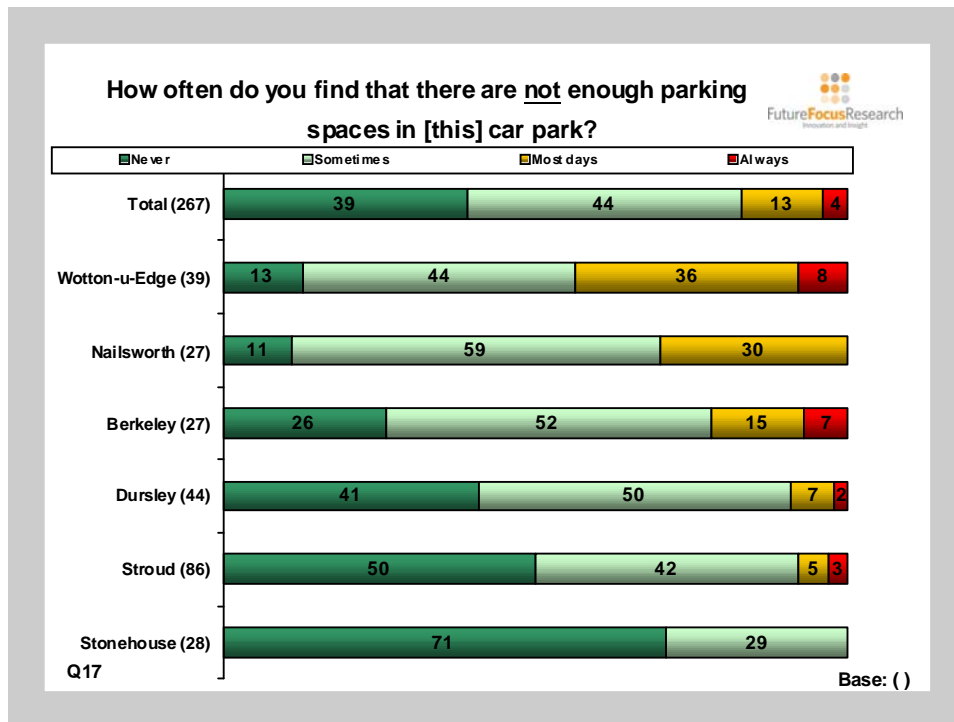


Figure 3.9 illustrates that in respondents experienced above average difficulty finding spaces in car parks in Wotton-under-Edge, Nailsworth and Berkeley. However, compared to the average, it was not as difficult to find spaces in Dursley, Stroud or Stonehouse.

Please note that Figure 3.9 still relates to the car park that each respondent used 'most frequently' and therefore it does not take account of their experiences in all car parks used.

## 4. Summary

This section provides an overview of the findings of this survey:

### 4.1 General policy

- 88% of respondents agreed that the running and provision of car parks by Stroud DC is important in supporting the district's economy.
- 90% agreed that the Council should continue to own and manage car parks in the District's main centres.
- 58% agreed that Council Tax payers should pay for the car parks as they benefit the whole community; 31% disagree with this statement.
- There was a split of opinion as to whether motorists alone should pay for the upkeep of car parks (49% agree; 42% disagree).

### 4.2 Management of car parks

- The majority of respondents felt Stroud DC should own/manage car parks in each of the 11 areas mentioned.
- Similarly, respondents felt that the five specific car parks referenced should remain publicly owned (either by Stroud DC or more locally).
- Shoppers and visitors were seen as the group that should be prioritised in the management of the district's car parks.
- Respondents felt that Stroud DC performed well in terms of the availability of spaces for each user group.

### 4.3 Parking charges

- 96% felt it was important that short stay spaces are available for shoppers/visitors throughout the day.
- 72% agree that parking charges help ensure motorists do not monopolise spaces and create turnover of spaces.
- 57% agree that motorists should be allowed to park all day in a single space.
- In terms of using charges in some car parks to fund the costs of other car parks (where currently no charge): 42% agreed that charges should only apply in the main car parks, whilst 42% also agreed that Stroud DC should introduce charges in those other car parks currently funded by charges elsewhere.
- Of the 125 respondents who agreed that charges should be introduced, they felt such charges should be introduced in each of the car parks mentioned.
- In those towns/villages with low shopper/visitor numbers, respondents felt that the parking should remain free of charge.
- The majority of respondents felt that the proposed parking charge of 30p per hour in Dursley and Wotton-under-Edge were 'about right'. However, opinion was split on the

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proposed fee of 50p per hour in Nailsworth (48% felt this was too high; 49% felt it was about right).

#### **4.4 Car Park Usage**

This best examined in relation to a specific car park. However, an overview is as follows:

- Main reason for using a car park in the District is shopping for food (87%) and shopping for other goods (84%) followed by 'services' (39%), e.g. bank, dentist, library.
- The most frequent duration of stay is 1-2 hours.
- The most important factors in selecting a car park are: proximity of car park to final destination; ease of finding space; free or reasonable charges.

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## Appendix A      Local area postcodes

Ref	Area Name	Postcodes
1.	Gloucester Border areas	GL2.2, 2.3, 2.4, 2.7, 3.4, 4.0, 4.8
2.	Stroud Central	GL5.1, to GL5.5
3.	Stroud Border Areas	GL6.0 to GL6.9 GL7.6
4.	Stonehouse	GL10.2, 10.3
5.	Dursley	GL11.4 to GL11.6
6.	Wotton-Under-Edge	GL12.7, 12.8
7.	Berkeley	GL13.9