APPENDIX A

Health Check Assessments of JCS Survey Centres

GLOUCESTER CITY COUNCIL

Joint Core Strategy Study Centres

Gloucester City Centre

Centre overview
Gloucester is a county and administrative centre located approximately 10 miles (16km) to the south west of Cheltenham and 13 miles (20km) to the south west of Tewkesbury. The city is located in close proximity to the strategic road network, including the M5 (junctions 11A and 12) and also the A40 and A417. The city centre has been subject to major regeneration over recent years, including mixed use development at Gloucester Docks whilst to the south and east of the city, major housing development has come forward at Qudegeley and Brockworth respectively.

Gloucester city centre is a compact centre focused on a historic main 'crossroads' based on Northgate, Southgate, Eastgate and Westgate Streets, which are all pedestrianised to a varying extent. The main extent of pedestrianised streets are located along Westgate Street and Eastgate Street, whilst Southgate Street provides direct access through to Gloucester Docks and Gloucester Quays Designer Outlet (to the south west of the city centre). The city centre contains two covered shopping malls – the Eastgate Shopping Centre (with an indoor market) and Kings Walk Shopping Centre whilst the centre also benefits from a significant number of tourist facilities, including Gloucester Cathedral (located off the northern end of Westgate Street) and the British Waterways Museum and other waterfront attractions focused on Gloucester Docks.

The city has a number of key regeneration sites which have been driven forward by the Gloucester Heritage Urban Regeneration Company. The sites, known as the 'Magnificent Seven' have transformed a number of sites including Gloucester Docks and Gloucester Quays located outside the city centre whilst other regeneration commitment sites at Greater Blackfriars, Greater Greyfriars and Kings Quarter are located within the city centre (adjacent to/within the primary shopping area).

Position in the sub regional hierarchy
The Management Horizons Europe (MHE) UK Shopping Index provides a useful benchmark to assess the change in a centre's retail raking over time. The MHE Shopping Index provides information of ranking all major retail centres across the country up to 2008. No ranking data is available since 2008.

In 2008, the MHE Shopping Index ranked Gloucester as 70th in the country out of the top 6,720 centres. In the wider sub regional context, Cheltenham was ranked 25th, Cardiff (ranked 21st) and Bristol and Bath (ranked 29th and 35th respectively). By way of comparison, the MHE index ranked Gloucester at 89th in 2003/4 which identifies improvement by rank over the period. However it is recognised that many of the aforementioned local competitor centres have strengthened their retail offer over recent years in contrast to Gloucester city centre which has not secured major new (central area) retail development for a number of decades.

Diversity of city centre uses
The diversity of uses (at ground floor level) in Gloucester city centre is based on information contained in the Goad Centre Report (as at August 2010).

This identified a total of 481 units which supported approximately 121,300 sq. m (1,306,300 sq. ft) of total floorspace. Tables 1 and 2 below summarise the retail composition of the centre in terms of outlet numbers and floorspace figures set against the national average. In addition, to assess change over time, this study has considered the baseline information contained in the 2008 Gloucester Retail Review (derived from the 2006 Goad Report), which identified a total of 472 units accounting for 116,761 sq. m of floorspace. Over the period 2006 - 2010, the Goad surveys confirm an increase in total units in the centre which have contributed to an additional floorspace of circa 5,000 sq. m. However, analysis of this historical Goad data confirms an increase in the level of vacant floorspace (and units) over this period and a corresponding fall in the quantum of comparison floorspace (by 5,000 sq. m) and a loss of 20 units in comparison use.

Table 1: Retail Composition by Outlets

Sector	No of units	% of retail composition	UK average (%)
Convenience	33 (31)	6.86 (6.57)	9.23
Comparison	189 (209)	38.29 (44.28)	41.89
Service	148 (153)	30.77 (32.42)	34.78
Miscellaneous	10 (13)	2.08 (2.75)	1.18
Vacant	101 (66)	21.00 (13.98)	12.92
TOTAL	**481 (472)**	**99.00 (100)**	**100**

Miscellaneous includes employment and careers centres, post offices and information centres
2006 Goad composition provided (in brackets) and Goad national average
Source: Goad (2010 and 2006)

Table 2: Floorspace by Retail Composition

Sector	Total floorspace sq m	% of retail composition	UK average (%)
Convenience	17,522 (17,215)	14.44	17.35
Comparison	50,084 (55,417)	41.27	47.35
Services	22,836 (22,129)	18.82	23.05
Miscellaneous	1,774 (2,137)	1.46	0.99
Vacant	29,144 (19,863)	24.01	11.26
TOTAL	**121,360 (116,761)**	**100**	**100**

Miscellaneous includes employment and careers centres, post offices and information centres
2006 Goad composition provided (in brackets) and Goad national average
Source: Goad (2010 and 2006)

The level of convenience composition in the city centre has marginally increased over recent years, and accounts for 33 units (6.8%) of the total composition. This is below the national average of 9.23%. This trend is reflected in the level of floorspace attributed to convenience uses, which at 2010 was estimated by Goad to be over 17,500 sq. m (14.4% of total centre floorspace) although this was approximately 3% lower than the national average (as measured by Goad).

The largest convenience units in the centre are the Sainsburys (Northgate Street) and Iceland (Oxbode). Both supermarkets are older and somewhat dated and in need of refurbishment. Whilst all of the Goad convenience sub categories are represented in the centre with the exception of butchers, each sub category is under represented when considered against the national average. The convenience offer is supplemented by the indoor market (in the Eastgate centre), the Gloucester Gate Streets Farmers' Market which is held ever Friday around ‘the Cross’ in the city centre, and a Cherry and White Market held in Kings Square (Friday and Saturday). A refurbishment of a number of units at Station Road has come forward, including a Tesco Metro. This has increased the convenience offer in the city centre.

Comparison units account for 38% of the total unit composition (189 units out of 481), which is over 3% lower than the national average. This below average level of composition is further reflected in the level of comparison floorspace which accounts for 50,000 sq. m and 41% of total floorspace in the centre. Again this is lower than the national average of 47.3%.

The focus for comparison goods retailing in the city centre is the focused on the Eastgate and Kings Walk Shopping Centres together with the prime shopping areas along Westgate, Eastgate, Southgate and Northgate Streets. The Goad report for the centre confirms representation from all of the 16 Goad comparison sub categories. Footwear and repairs, mens/boys clothing, sports and toys together with jewelers are all well represented in the centre. By contrast, the centre is underrepresented (below the national average) in a number of the following categories; female and general clothing, furniture carpets and textiles, books and stationery, DIY, gifts, cars and accessories, chemist, toiletries and opticians, florists and gardens.

The level of service uses and floorspace is also identified to be lower than the national average, accounting for approximately 30% of all units and 18% of total floorspace. This is surprising given the administrative county role of Gloucester and the growing importance of tourism linked to Gloucester Cathedral and the ongoing regeneration of the waterfront and key historical sites in the wider central area.

The city centre has a limited mix of restaurants and pubs, many of which are considered lower end national chains. The Gloucester Retail Review (March 2008) stated that the 'mid to upper market restaurants are conspicuous by their absence' which remains the position. This is confirmed by the 2010 Goad report which identified below national average provision in 6 of the 7 service sub-categories, and whilst deficiencies were marginal, the restaurant/café/food sub category was relatively low in the national context. This position is confirmed by the results of the 2011 Household Survey although it is noted provision is available at Gloucester Docks and Gloucester Quays Designer Outlet which occupy an out of centre location.

As part of the 2011 DPDS update survey, the 2010 Goad base data has been reviewed for changes in composition. This confirmed no major change in the overall composition of comparison and convenience uses, with a minor increase in comparison uses (an increase of two units to total 191 units), no change in convenience provision (33 units) and an increase in one miscellaneous unit (11 units).

More significant changes were identified with regard to services (and vacant units, discussed later). The level of services, as defined by Goad, has increased by 11 units since the August 2010 Goad report (to 159 units), with a marked increase along Westgate Street.

Alongside the retail function, the city centre acts as an important administrative centre, and contains the County Council offices at Westgate Street whilst a number of other smaller Council offices exist within the centre. In addition, Eastgate Street supports the Guildhall – an important cinema and concert venue whilst to the south of Eastgate Street is the GL1 Leisure Centre.

Tourism is an important sector in the city centre and is focused on Gloucester Cathedral, located off Westgate Street. In addition, the city centre is linked to mixed uses available at Gloucester Docks via Southgate Street whilst the Language Immersion Centre is currently under construction at Commercial Road (off Southgate Street). This forms part of the Blackfriars redevelopment area.

Edge and out of centre provision

Gloucester contains edge of, and out of centre retail facilities.

Major retail provision is focused on Gloucester Quays, St Oswald's Retail Park and the Peel Centre. Gloucester Quays Designer Outlet is the newest retail provision in the city and is located within the Gloucester Docks regeneration area, with access from the city centre via Southgate Street. It provides 26,476 sq m (285,000 sq ft) of comparison and convenience floorspace, focused on a designer outlet centre, including Marks and Spencer and Next outlet units, together with food and drink units (Pizza Express and Nandos). A number of other food and drink uses are located on the approach to the Quays development. Other uses within the wider Gloucester Docks include an antiques centre, hotel and the National Waterways Museum. A significant level of investment has been implemented to improve links between the city centre and Gloucester Quays to ensure wider economic benefits for the city centre.

The Peel Centre adjoins Gloucester Quays and provides a retail warehouse park together with a cinema and food/drink units. The site is subject to a planning application for a change of use to retail from cinema. A Sainsburys store is located at the St Ann's Way. Other retail parks include St Oswald's Retail Park (anchored by B&Q), together with a large Tesco store, and the Westgate Retail Park. The Council has recently resolved to grant planning consent (subject to call in) for a redevelopment of the Tesco store at St Oswalds Park together with a foodstore (Morrisons) at the Railway Triangle at Metz Way.

An Asda store is located off Metz Way (to the south east of the city centre), and Go Outdoors (off Bruton Way, south of Eastgate Street).

A significant level of retail warehousing is provided along Eastern Avenue, focused on traditional bulky goods operators at the Eastern Avenue Retail Park, Metz Way Retail Park, Gloucester Retail Park and other stand alone units. The large level of out of centre supply, which in some areas is considered dated and unlikely to prove attractive to modern retailer requirements, has impacted on vacancy levels.

The Gloucester Retail Review (March 2008) estimated the amount of out of centre retail floorspace at over 76,000 sq. m (GIA), excluding the designer outlet at Gloucester Quays. This is greater than the level of convenience and comparison retail floorspace in the city centre (as measured by Goad).

Retail representation and retailer demand

In total, Goad identifies 168 multiple outlets in the city centre, which represent 34.93% of all units in the centre. This represents a high level of multiple retailer representation which exceeds the national average (30.49%). The proportion of national multiple retailers tend to be higher in the larger centres; multiples are attracted by the large catchment populations of such centres and can afford higher shop rents.

The strength of the multiplier offer in Gloucester is further confirmed by the presence of major retailers. Of the 31 major retailers identified by Goad, 24 are represented in the city centre. Notable exceptions are Next and TK Maxx. It is further noted that the Goad report does not take account of the Tesco (Metro) which has opened at Station Road, which will add to the number of major retailers in the centre. Debenhams occupies a large unit at the Oxbode whilst two Marks and Spencer units exist at Northgate and Southgate (the Northgate store will relocate to the former Woolworths unit on Eastgate Street).

The Focus database provides a useful indicator of retailer requirements. As at January 2010, Focus identified a total of 40 retailer requirements for Gloucester, which placed the city as the 67th nationally in terms of retailer requirements (of those centres measured by Focus). Over recent years, the level of requirements for the city increased substantially from 2007 (70) to a peak of 97 in January 2009 although this has since fallen by a third. Given recent economic conditions, it is unsurprising that retailer requirements have fallen but the position remains that Gloucester city centre continues to attract reasonable levels of retailer demand, in the context of a challenging environment.

Discussions with local property agents confirm that demand for the city centre is stable if somewhat low for a city of its size. Local agents report that the city has a number of requirements, particularly from the discount and lower end multiple retailers although there is confidence that the attraction of the city centre has improved in light of the progression of the Kings Quarter developer selection exercise, the pending take up of the former Woolworths unit on Eastgate Street by Marks and Spencer, investment by Debenhams in their existing store to help secure new concessions and refurbishment works at the Eastgate Shopping Centre.

The absence of new development in the city centre is stated by agents to be a major reason for lower retail demand, whilst for some agents the issue remains the perception of the city, particularly in securing retailer interest which has historically focused on Cheltenham.

Retail rents
Information from local agents active in the city confirm that the prime Zone A rents in 2011 is £105/sq. ft although a number of agents indicated lower Zone A rents in the range £80- £90/sq. m.

The Focus report for the centre identified Prime Zone A rents to be £125/sq. ft in June 2009. Over the period from 2002 to 2006 prime retailing rents were in the range of £120/sq. ft to £130/sq. ft, increasing to a high of £145/sq ft in 2008/09. Whilst the represents a decrease when compared to the peak years, it is clear that Gloucester has experienced steady level of prime retail rents, particularly over the period from 2001 to 2005 although a marked reduction in Prime Zone A rents has occurred over recent years. This fall off in prime rents confirmed by local agents is a matter for concern.

Commercial yields
The assessment of yields provides a simple benchmark which the property market uses to asses the comparative attractiveness of different shopping centres, and reflects the ratio of rental income to capital value. As a measure of retail viability, yields are a valuable indicator, but one which needs to be used with care. The level of yield on its

own is of less value than in comparison with other yields at different points in time and at different locations. Yields measured consistently over time can give an indication of the direction in which a particular city centre is moving.

Historical information collated by the Valuation Office identify yields of approximately 6.75 - 7% over the period 1998 – 2005, strengthening to 6.5% in 2006 and 6% in July 2007. This confirms an improvement in the yield performance of the city centre over this period although the current estimated prime retail yields for Gloucester stand at 6.25%. This is considered reflective of market trends.

Vacant street level property

The 2011 DPDS survey identified 86 vacant units in the city centre as based on the Goad plan base of the city centre. This accounted for 17% of total units which is an improvement compared to the Goad report undertaken in August 2010. This identified 101 vacant units in the city centre, which accounted for 21% of total units, and approximately 29,144 sq m of floorspace.

This level of vacancy remains high when compared to the Goad national average (12.9%), with more floorspace given over to vacant units in Gloucester city centre than to services. In historical terms, comparison with the 2006 Goad Report identifies a marked increase in the vacancy rate from 13.98% (66 units) to 17% at the time of the DPDS survey.

In part, an element of the increased vacancy can be attributed to the uncertainty of the Kings Square area although this is moving forward as Kings Quarter whilst the 2011 update of the Goad baseline report identified a reduction in the vacancy rate by 16 units. This reduces the overall vacancy rate from 101 units to 85 units, which represents an improvement to 17% of total units. This remains high notwithstanding economic conditions and ongoing regeneration in the city centre. It is noted that many of the vacant units have been given over to service sector provision with good take up noted along Southgate Street and Kings Square in particular.

The largest vacant unit in the centre is the former Woolworths Store at 12-18 Eastgate Street although this is due to be occupied by Marks and Spencer, who currently trade from two units in the city at Northgate and Southgate respectively. It is reported that retailer interest exists for the Northgate store.

Pockets of vacant units exist at the more peripheral secondary retailing frontages although there has been progress on a number of long term vacant units. Examples include take up on Southgate Street, Kings Walk / Kings Square, Station Road – likely a reflection of linkages to Gloucester Docks, and the prospects for the Kings Quarter redevelopment, together with take up of the former B&Q unit by Go Outdoors.

Pedestrian flows

The Gloucester Retail Review (2008) undertook an analysis of pedestrian flows in the city centre in 2007. Based on 30 count points (between the hours of 10.00am and 5.00pm during a Monday to Saturday week), the survey confirmed the highest pedestrian flows focused on the core pedestrianised areas during daytime hours. The highest counts were recorded around the lower end of Eastgate Street with the Woolworths unit recording the highest weekly count (Monday to Saturday). High footfall was also recorded on Northgate and Westgate streets although the Woolworth unit has since closed.

Information provided by Gloucester City Council provides overall average weekly pedestrian flows, based on a number of locations in the primary shopping area, for the period 2009 - 2011. A summary of the data is provided in Table 3 below:

Table 3: Gloucester City Centre Average Weekly Footfall by month, 2009 - 2011

Month	2009	2010	2011
Jan	132,170	122,530	120,776
Feb	129,454	132,048	127,330
March	135,156	133,335	129,024
April	133,289	135,399	126,993
May	137,436	135,534	N/A
June	138,548	139,763	N/A
July	144,990	143,901	N/A
Aug	149,701	149,174	
Sept	142,992	141,544	
Oct	148,735	146,842	
Nov	148,278	141,810	
Dec	188,717	152,537	

Source: Gloucester City Council (2009, 2010 and 2011)

Table 3 confirms a general fall off in pedestrian flows in the city centre over the period 2009 – 2011. Although data for 2011 is limited, the data for the year to date is lower than that for previous years. That aside, pedestrian flows in 2009 and 2010 appear broadly comparable although marked differences are noted in January and particularly December of each month (it should be noted December 2010 was a period of substantial snow and cold temperatures which is likely to have impacted on visitor numbers). Analysis of the data for the remainder of 2011 will provide a useful indicator of whether the trend of declining pedestrian flows in the city centre has continued which will be of a concern.

To supplement the average weekly footfall across the city centre, DPDS observations of the centre survey together with a mid-week (afternoon, 2pm - 4pm) pedestrian count, identified the highest pedestrian flows within the pedestrianised primary retailing frontage. High pedestrian counts were recorded at the former Woolworths unit (Eastgate), Marks and Spencer (Northgate) and H Samuel unit (Southgate). By contrast, lower counts were recorded along Westgate and Station Road.

Accessibility

Gloucester is strategically located for the main road and is located 5.5 miles from junction 11 of the M5. It benefits from three access points onto the M5 (junction 10 -12). In addition the A40 and A48 provide key links to the east and west whilst a number of other major routes converge on the city centre, including the A430 and A4302.

Car parking provision in the city centre is considered good and well distributed, based on 11 car parks which provide over 2,100 spaces. These include three large multi-story car parks, at Longsmith Street off Southgate Street (323 spaces), Bruton Way (by Asda, 580 spaces) and Bruton Way (by Bus Station, 434 spaces). Other car parks include the surface level facilities at the train station (200 spaces), Wellington Street off Eastgate Street (103 spaces) and Park Street off Northgate Street / Black Dog Way (107 spaces). Smaller sites exist at Spread Eagle Road and Prince Street. Car parks are however generally rather dated, complicated to reach and provide a poor environment into the centre. Parking is however considered of a reasonable level of provision a city centre of its size.

Gloucester benefits from a bus and rail interchange located in close proximity to the city centre. The bus station at Kings Square provides a comprehensive number and frequency of bus services to the city centre for the local catchment area with local circular services (e.g. routes 1, 3, 4, 7) together with services to a number of the large residential areas including Quedgeley, Kingsway, Brockworth and Abbeydale. In addition, service provision is available to Dursley, Stroud, Coleford, Cinderford, Ross on Wye and Newent, and also Tewkesbury, Cheltenham and further afield to Cirencester, Malvern and Oxford.

The bus station is in need of improvement and there is a requirement for a more modern facility for the city centre. Given its excellent accessibility and the opportunity to facilitate a public transport hub with the railway station, a new bus station is promoted as part of King Quarter, located on Bruton Way.

The railway station is located off Bruton Way and is served by a number of regular services (an hourly service between Bridgend/Cheltenham, Cardiff/Nottingham) and more infrequent services to Cheltenham, Birmingham, Bristol and London, although the line is not part of the main Bristol to Birmingham railway line, which necessitate travel to Cheltenham to link with the wider network. The station has been subject of ongoing qualitative improvements, including covered platforms, new waiting rooms and ticket office improvements as part of the National Station Improvement Programme.

The ongoing investment in the railway station alongside the potential delivery of a new bus station as part of Kings Quarter provide the city centre with a future integrated transport interchange which can only benefit Gloucester city centre as a retail and visitor destination.

The city centre is also served by Park and Ride schemes at St Oswald’s and Waterwells, with service 507 running at 12 minute frequency, with stops in the city centre and Gloucester Quays (0645 to 1853, Monday to Saturday).

Pedestrian (and cycle) access in the city centre is considered good and benefits from a comprehensive pedestrianised area focusing on the crossroads of the ‘gate’ streets. In addition, the centre benefits from two covered shopping centres - Kings Walk which provides access from the bus station, Kings Square and the Oxebode to Eastgate Street, and the Eastgate centre which provides a retail circuit between Eastgate Street and Southgate Street. However Bruton Way/Black Dog Way may discourage trips by foot and cycle from areas to the east.

The 2011 Household Survey confirmed a good level of satisfaction with accessibility by public transport to the city centre from within its immediate zone (zone 5); 75% identified this to be very good/good. The other catchment zones relevant to Gloucester city centre confirmed general levels of satisfaction with public transport accessibility. Similar high levels of satisfaction were recorded with regard to accessibility by car to the city centre. In all of the Gloucester catchment zones (five in total); over two thirds of survey respondents identified this to be very good or good.

High levels of satisfaction were recorded with regard to the ease of pedestrian movement in the centre, with the majority of respondents stating pedestrian movement to be very good/good.

The adequacy of car parking was rated less favourably but still considered good in most cases; however a quarter of respondents in three of the five Gloucester zones considered parking arrangements to be poor. In general Gloucester ranks relatively high for parking by residents who are familiar with the centre although we consider that it is more difficult for visitors unfamiliar with parking arrangements.

Customer and residents views
Information collated as part of the previous household surveys to inform retail studies for the city, confirmed a general satisfaction with the centre, with the most significant response focused on nothing/little that needed changing. A number of concerns were identified which included the unattractive environment, lack of good non food shops, and also a difficulty in parking near shops.

The results of the 2011 Household Survey confirm little changes in attitudes and perceptions of the city centre. Of the five Gloucester catchment zones identified in the 2011 survey, between 44% and 55% considered the range and choice of non food shops to be good. Limited numbers of respondents considered this to be very good although within a number of zones, over a quarter considered the range to be poor. Within its immediate catchment (zone 5), 34% considered the range/choice of comparison shops to be poor. Similar comments apply in regard to the choice and quality of supermarkets; 37% of zone 5 respondents identified this to be poor.

By contrast, the city centre was identified as good/very good in regard to its choice and quality of services although the range/choice of leisure and entertainment facilities was less positive; almost a third of zone 5 considered this to be poor.

Less than a quarter of all respondents in its core catchment zone did not consider there was anything which would encourage them to visit Gloucester although the a third of respondents considered the city centre required a broader range of shops (34%). Other factors were identified as the need for a more attractive city centre environment, and the need for more or better niche/specialist shops. A similar trend of respondents was raised by respondents from the other catchment zones identified in the Gloucester catchment area.

In terms of dislikes, just over a quarter (27%) identified that there was nothing of concern from within its immediate survey zone. Respondents from this zone also identified major concerns, with the most significant concern focused on the unattractive environment and dirty streets/litter (27%) and the limited number of shops (particularly for clothing). Other centre dislikes include the level of vacant shops (10%), lack of safety/personal security and anti social behaviour (10%) and the poor quality of shops (9%). Respondents from the other Gloucester zones identified the unattractive environment as the major dislike of the city centre.

It is apparent that respondents to the both household surveys have raised common concerns, particularly in relation to the negative comments focused on the need for a broad range, choice and quality of non food shops, and also the need for improvements and enhancements to the environment of the city centre.

Perception of safety and occurrence of crime

Respondents were questioned on the level of personal security and safety in the city centre. The results confirmed that in the five zones considered most appropriate as the catchment area for the Gloucester, the majority of respondents the level of security and personal safety to be good. Within Zone 5 (Gloucester), 77% of respondents considered the city as good against this measure whilst 14% considered it to be poor, whilst within the Severn Vale (zone 6), 62% considered safety and security in the centre to be good.

The overall perception of respondents is the city centre is viewed as a safe centre for shoppers although a small proportion of respondents from within the survey zones did identify related issues of safety/security/antic social behaviour and graffiti as a dislike of the city centre.

Environmental quality of the city centre

The city centre is characterised by a diverse mix of historic buildings and modern development. Focused along the historical configuration of the four ‘gate’ streets, the city centre contains the Blackfriars, Greyfriars and the impressive Gloucester Cathedral intermixed with elements of modern architecture, which in areas is in need of refurbishment. In many areas, the city centre contains a number of distinct sub areas.

The built environment is generally well maintained although recent investment in areas of the city centre is evident, including the enhanced linkages to Gloucester Docks via the works to the lower end of Southgate, which has improved the pavements and street furniture in the area. The enhancement of this area will improve further with the development of the Language Immersion Centre, as part of the masterplan for the Greater Blackfriars area. Similarly, the pedestrianised areas of the centre are generally well maintained, with good use of outdoor café seating in sections of Southgate and particularly Westgate, in proximity to the cathedral, which contribute to vitality in the area.

Certain areas of the city centre however are of a lower environmental quality and appear dated. The city centre has not benefitted from new development for a number of decades. This has resulted in areas which require investment to address outdated, poor quality and unattractive environments, particularly in the Kings Square area. This area however is subject of developer interest associated with the Kings Square redevelopment which is intended to deliver new retail and leisure floorspace, and is expected to offer the opportunity for ongoing development in the future, including a modern public transport interchange. This redevelopment is a priority and will greatly contribute to the environmental quality of this area of the city centre. In addition, it is considered the two covered shopping malls - Kings Walk and Eastgate are in need of refurbishment to maintain their attractiveness to retailers and shoppers alike.

The 2011 household survey confirmed concerns of the quality of the city centre environment. Of the five survey zones forming the Gloucester catchment, approximately half of all respondents in the zones considered the quality of the environment to be good. High levels of dissatisfaction were recorded, with 40% and 38% of respondents in the Gloucester and Severn Vale zone considering the environment to be poor. The need for a more attractive environment was also identified by respondents as a specific issue to encourage greater use of the city centre. The unattractive environment (including letter and dirty streets) was identified as a major ‘dislike’ of the centre, typically by over a quarter of respondents to the household survey.

Health check conclusions

Gloucester city centre is characterised as a compact, modern shopping centre interspersed with attractive historic features such as Gloucester Cathedral, Blackfriars and Greyfriars. The main retailing area is focused on the pedestrianised interchange of Northgate, Westgate, Southgate and Eastgate Streets whilst the centre supports two covered shopping malls which are considered somewhat dated and in need of investment. The centre abuts a number of key regeneration sites, such as the Docks and Gloucester Quays area which offer alternative attractions, although a number of central area regeneration commitments are increasingly focusing attention in the city centre and will deliver a step change in the retail performance of the city centre.

Whilst it is considered the city centre performs as a relatively robust and healthy centre, and has shown good resilience in a difficult economic climate (including a marked reduction in vacant units), a number of underlying weaknesses remain. This includes the absence of modern development in the centre over recent decades (and resultant ability to attract more anchor stores and higher quality stores) which has resulted in a below national average composition of comparison units. This limited range, and quality in the retail offer is identified as a major weakness by respondents to the 2011 household survey.

In this context, the comparison (and particularly the fashion) offer is considered somewhat limited for a city of its size, whilst the lower level of retailer requirements and fall off in Zone A retail rents are considered by local agents to be an indicator of lower investment confidence and a dated retail environment. However positive opportunities for change exist, particularly associated with the potential offered by Kings Quarter redevelopment, which seeks to transform the unattractive environment of Kings Square and deliver a new retail destination in the centre based on larger units (suitable and attractive for securing anchor and mainstream retailers) alongside an enhanced food/drink offer. It also offers an enhanced public transport gateway to the city centre and will deliver environmental improvements, which remains another area for improvement in certain areas of the centre. This dominance of 1960/70’s architecture does in parts detract from the more attractive area of the city centre.

In summary, Gloucester city centre offers an interesting and vibrant shopping centre which benefits from its historic past. Linkages with the Gloucester Docks (via Southgate Street) have been improved and have benefitted from environmental improvements and investment. The Kings Quarter redevelopment will be crucial in maintaining investment momentum in the city centre, and offers a significant enhancement to the north east area of the city centre (and it’s wider retail offer), to balance the draw of the significant areas of out of centre development (such as the Gloucester Quays Designer Outlet) which exist in the city. The fundamentals of a successful retail centre exist in Gloucester although there is need for more positive perceptions of the centre, environmental improvements and an enhanced retail offer.

Quedgeley District Centre

Centre overview

The district centre is located on the Bristol Road (B4008) just off the A38/A30 which provides a major arterial route into Gloucester to the M5. The centre lies approximately 4 miles (6.4 km) to the south west of the city centre and 3 miles (4.8 km) from junction 11, M5.

The centre is comprised of two distinct areas served by a central roundabout from Bristol Road and Severnvale Drive. The western area of the site is dominated by a large Tesco superstore (including petrol filling station and parking) which includes a small retail parade, together with a number of community uses. The east of the site is focused on a mix of large format retail units, Aldi foodstore, small retail parade units and a Harvester restaurant.

Diversity of district centre uses

As part of the Council's Local and District Centre Health Check Study (2010), a total of 27 retail units were identified. The 2011 DPDS survey identified 26 retail units, a reduction of one unit (focused on a Tesco site office no longer in operation).

Table 1: Retail Composition by Outlets

Sector	No. of units	% of retail composition at	Goad UK average %
Convenience	2	7.69	9.23
Comparison	5	19.23	41.89
Services	17	65.38	34.78
Miscellaneous	1	3.84	1.18
Vacant	1	3.84	12.92
TOTAL	26	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

In retail composition terms, Table 1 confirms that the centre contains a variety of retail unit sizes with the largest unit dominated by Tesco superstore (which has been subject to recent extension and refurbishment works). The only other convenience use is focused on Aldi. No smaller convenience provision exists following the closure of Martins convenience/newsagents store. Despite the low number of convenience units, the two units offer a significant level of floorspace, and range and choice of offer for centre users.

A higher level of comparison offer exists (5 units) and is dominated by national multiples (including Next, Brantano and Matalan) which effectively operate as a stand alone retail warehouse scheme. The actual number of comparison units has fallen since the loss of the Motor World use although the level of provision remains approximately half of the national average. In retail composition terms, this representation is less than half the UK average.

The level of service provision in the centre is high, with some 65% of units providing a retail service offer; the national average is 34%. It is recognised that the majority of the service uses are contained in the smaller retail parade units located at Scholl Lane.

Uses include estate agents, hairdressers and takeaways. The centre also supports a good level of community uses including a library, surgery, community centre and public house.

Edge and out of centre provision

The district centre is located in close proximity to Gloucester town centre whilst other major concentrations of retail provision are focused at the Gloucester Quays Outlet Centre, the Peel Centre and St Oswald's Retail Park together with the Eastern Avenue area of the city. A summary of the extensive level of out of centre retail provision is provided as part of the Gloucester city centre assessment.

Retailer representation and retailer demand

The centre is well represented with national multiples which dominate the larger units in the centre. Occupiers include Aldi and Tesco, together with Next, Brantano and Matalan. Independent retailer representation is concentrated in the more traditional retailing units to the south of School Lane.

Discussions with local agents confirm the split nature of the retail offer of the centre, comprised of large units occupied by national multiples alongside small units occupied by independents. Agents consider the centre to be a mix of a local centre and retail warehouse park but one which is considered well used and reflective of its role and function.

Retail rents and yields

Given the lack of recent transactional activity, local agents were unable to provide details of rents and yields.

Vacant street level properties

There are no vacant units in the centre which is unchanged from the council's survey in May 2010.

Pedestrian flows

Information collated as part of the 2010 health check confirms the impact of car parking on pedestrian movement within the centre. Whilst footfall near to the Tesco entrance is healthy, this falls off markedly towards the School Lane area. The impact of the two large areas of car parking, for Tesco and the comparison retail units respectively, impact on the pedestrian access across the centre. The car based dominance of the centre was confirmed by the 2011 survey of the pedestrian flows with activity focused on the stores/car parking areas. Overall, the pedestrian environment is overshadowed by the car centric nature of the centre although this is not fully supported by customer perceptions of the centre which confirm general satisfaction with regard to pedestrian linkages to the centre.

Accessibility

The district centre benefits from a good level of accessibility, located off the main A38/A30 road which acts as a major route to the city centre from the M5. The centre serves a large surrounding residential area, and also serves as an important car focused destination.

Public transport services are focused on local bus services along Bristol Road (Service 12/12A, 14/14A, 113) which link Gloucester city centre with Quedgeley. A number of bus stops serve the centre including stops at Tesco and Matalan (vary by service).

The Council's 2010 user survey of the centre confirmed that a good level of satisfaction with regard to bus links, and ease of walking and driving to the centre, whilst the majority of respondents indicated use of the centre for main food shopping purposes, given the existence of the large Tesco store. The 2011 survey identified that over half of respondents considered accessibility by public transport to be good, with high levels of satisfaction in relation to accessibility by car and parking provision.

Customer and residents views
The City Council's Health Check assessment was supported by a local questionnaire. The results raised some interesting comments. In terms of the perception of the centre, many respondents considered the quality, and in particular the range of shops to be poor (which seems to differ to the 2011 survey findings), whilst the range of other services was generally considered poor. Similarly, the visual appearance and environment were rated as satisfactory. The highest level of satisfaction focused on the ease of walking to the centre and accessibility by car. Overall, most respondents considered that the centre was poor in its ability to serve customer needs.

As part of the 2011 Household Survey, those respondents which identified the Quedgeley centre as their nearest 'smaller' centre, confirms a good frequency of use of the centre for food shopping (60% use at least once a week) – reflecting the main food destination role. By contrast, use of the centre for non food purposes was more limited (nearly 40% used it once a month or less), whilst use for services was low (approximately 75% never used the centre for these purposes).

In terms of satisfaction with the centre, over 57% considered the choice and quality of supermarkets to be good although 19% considered this to be poor. Similarly, just over half (53%) considered the range and choice of non food shops to be good, which is more positive than the conclusions of the 2010 local questionnaire.

Perception of safety and occurrence of crime
Respondents to the household survey were broadly satisfied with the safety and security of the centre; 76% considered it to be good/very good.

Environmental quality of the district centre
The centre is characterised as well kept and maintained, but is a large and somewhat fragmented shopping area, containing large retail units with associated parking, and separated by the Bristol Road (and roundabout) in the centre.

Overall, the majority of respondents to the Council's health check questionnaire identified the visual appearance and the local environment to be satisfactory. The 2011 Household Survey confirmed that three quarters of respondents stated the quality of the environment to be good/very good.

Health check conclusions
The district centre effectively serves as an out of centre retail park which is anchored by a large foodstore (Tesco), discount foodstore (Aldi) together with a large format multinational comparison operators (Next, Matalan, Brantano). Alongside these large

units, the centre also contains a number of retail parades which support a range of small, independent retail and services uses. As such, the centre fulfills an out of centre function rather than one of a district centre, and does not represent a compact centre rather one which is physically separated by Bristol Road and which lacks pedestrian linkages.

Notwithstanding this, the centre remains attractive to retailers (and has been subject to recent investment following the extension and refurbishment works at Tesco). It further supports a good mix of uses and has a good level of representation from national multiples. Accessibility by car is good although this reflects its role as a car based destination. In use and perception terms, the centre is considered satisfactory (particularly with regard to accessibility by car and parking arrangements) and remains an important main food shopping facility for residents in Gloucester.

Abbeydale District Centre

Centre overview
The Abbeydale District Centre is located to the south east of Gloucester city centre and is situated within a large residential area with access from Heron Way via Glevum Way. The centre is dominated by a large Morrisons (former Safeways) supermarket with a parade of five retail units to the south of the Morrisons store. An extensive area of car parking exists to the south and east of the store.

Diversity of district centre uses
The centre represents a small centre which totals 6 units and is smaller than the other district centre at Qudegeley.

The retail composition of the centre as measured in the 2011 DPDS survey is set out in Table 1 below.

Table 1: Retail Composition by Outlets

Sector	No. of Units	%of Retail Composition	Goad UK Average %
Convenience	1	16.66	9.23
Comparison	2	33.33	41.89
Services	3	50	34.78
Miscellaneous	0	0	1.18
Vacant	0	0	12.92
TOTAL	6	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

In terms of retail composition, there has been no change in the number of outlets or the nature of occupiers since the Council's health check in May 2010. It is important to note that the Council survey of the centre identifies 10 units which includes the 4 units identified at Commercial House (discussed below).

The centre is anchored by Morrisons and also contains two comparison units (charity shop and chemist) together with three services (takeaway, estate agent and hairdresser).

Edge and out of centre provision
A number of uses exist outside of the defined district centre boundary which contribute to the vitality and viability of the centre. A public house, surgery and sports and community centre are located in close proximity to the district centre (accessed via Glevum Way). In addition, the Council's health check identified a number of uses in Commercial House (located to the south east of the centre off Abbeymead Avenue). Uses are focused on services including an estate agent, financial advice together with an opticians and dental practice.

A summary of the extensive areas of out of centre provision is provided as part of the Gloucester city centre assessment.

Retailer representation and retailer demand
A number of national multiples exist in the centre including Morrisons, Lloyds Chemist and Sue Ryder. The other units are occupied by independents.

Discussions with local agents confirm the dominant role of the Morrisons store although there is recognition that the centre functions effectively, supports a good mix of uses, and serves a large residential area.

Retail rents and yields
Given the lack of recent transactional activity, details of rents and yields are not known.

Vacant street level properties
There are no vacant units in the centre which is unchanged from the council's survey in May 2010.

Pedestrian flows
Our observations of the centre confirmed a steady level of pedestrian activity, primarily focused on shoppers using the Morrisons store although footfall passing the retail parade was also considered reasonable. This supports the Council's pedestrian flow survey which also identified a good level of activity passing the chemists and charity shop.

Accessibility
Although the centre serves a large surrounding residential, area, the centre acts as a car orientated destination with easy access from Glevum Way via Heron Way and Abbeymead Avenue.

Public transport services are focused on local bus services along Abbeymead Avenue (Service 3 and 4) which link with the city centre. A bus stop is located immediately to the south of the centre on Heron Way.

The Council's user survey of the centre confirmed that the majority of respondents stated the centre was rated good with regard to its accessibility for pedestrians, and by car, whilst the provision of car parking was considered acceptable. The 2011 Household Survey results support this; over 53% considered accessibility by public transport to be good, whilst approximately 75% of respondents considered accessibility by car and the adequacy of car parking to be good/very good. Similar perceptions were stated in regard to the ease of pedestrian movement in the centre.

Customer and residents views
The City Council's Health Check assessment was supported by a local questionnaire.

The results confirm general satisfaction with the role and function of the centre, with half of respondents staying in the centre between 30 – 60 minutes, whilst the chemist and services (at Commercial House) act as additional key uses alongside the main food anchor role. The survey also provided an indication of local user's views on the centre, with general satisfaction identified in regard to the range and quality of shops available. In terms of the range of other services, this was less positive, with 25% of respondents stating this to be poor The overall assessment concluded a centre ranked good in terms of its ability of meeting respondents needs.

The 2011 Household Survey provides more detailed comments for those that identified Abbeydale as their nearest centre, and confirms a good frequency of use of the centre for food shopping (60% use at least once a week) – reflecting the main food destination role. Respondents also identified a high level of satisfaction with the choice/quality of supermarket (78% good/very good). By contrast, the non food use is more limited – 64% of respondents never used the centre for this shopping purpose.

In this context, 56% considered the range and choice of the non food offer to be poor/very poor. The perception of service quality and choice, and use of the centre for services is generally rated poor.

Perception of safety and occurrence of crime

Respondents to the household survey were broadly satisfied with the safety and security of the centre; 68% considered it to be good/very good.

Environmental quality of the district centre

The centre is characterised as well kept and maintained although the site is dominated by a large superstore and associated parking.

The majority of respondents to the Council's health check questionnaire identified the visual appearance of the centre to be satisfactory. The 2011 Household Survey confirmed that three quarters of respondents stated the quality of the environment to be good/very good.

Health check conclusions

The district centre is anchored by a large Morrisons superstore and also contains a fully occupied parade of five retail units which provide a range of local retail and service uses. The role of the centre is enhanced by its proximity to a number of important community uses located adjacent to the centre.

The centre benefits from good accessibility and is well used. There are good levels of satisfaction from local users of the centre although it is recognised the main use of the centre serves as a main food destination.

There are no obvious recommendations although there is scope for the enhancement of pedestrian links to the existing community uses.

CHELTENHAM BOROUGH COUNCIL

Joint Core Strategy Study Centres

Cheltenham Town Centre

Centre overview
Cheltenham represents an important regional retail and employment centre in Gloucestershire. Located on the edge of the Cotswolds, the historic spa town serves a wide hinterland and is considered a key centre at the regional and national level for shoppers and tourists alike. The town is the main focus for retailing in the Borough.

Located 9 miles to the east of Gloucester, the town is well served by strategic connections, and is situated approximately 3 miles to the west of junction 11 of the M5, is served by the A40, and benefits from national rail connections via Cheltenham Spa railway station. The town is considered an important employment location – particularly for financial services and the public sector, together with the retail and tourist sector. In 2001, the population of Cheltenham urban area was 98,875.

The town centre is characterised by a historic and regency environment, particularly in the smaller, retail areas which form part of the wider town centre (e.g. Montpellier). The central area benefits from an overall pedestrian friendly shopping area, and is largely focused along High Street (pedestrianised in a number of distinct areas) together with Regent Street and Promenade. Two shopping centres exist in the centre, located off High Street at Beechwood Shopping Centre and Regent Arcade respectively.

The 2006 Retail and Leisure Study for the town centre concluded that the centre can be characterised by six distinct areas, which relate to the following:

- Central High Street – the section of the High Street between Cambray Place and the Promenade, and includes the two shopping centres (Regent Arcade and Beechwood), and focus for many of the national multiple retailers and banks/services.
- The Promenade – focus for high quality retail and restaurant uses, set within an attractive environment .
- North West High Street - This area extends along the High Street from The Promenade to St Georges Square. The eastern part has been semi pedestrianised (except for buses and deliveries) between Henrietta Street and North Street. The remainder is open to one-way traffic
- Lower High Street - area extending west of St Georges Square towards the railway bridge, which is characterised by pubs, cafés, restaurants, take away food outlets and other services (e.g. hairdressers, laundrettes, travel agents and estate agents)(discussed separately below.
- South East High Street – area extending south west from the junction of Cambray Place and the High Street, located in proximity to the town's main shoppers' car parks, it attracts a significant number of national multiple retailers and larger chain restaurants and pubs.
- Montpellier – the shopping area of Montpellier is physically separated from the town centre but offers a mix of specialist shops and services with cafes, restaurants and bars. The main visitor attractions are on Montpellier Street and Montpellier Walk, both of which boast high quality Regency building facades (discussed separately below).

A number of key regeneration sites are identified in the town centre. The sites at North Place and Portland Street car parks, and Royal Well, are actively promoted by the Cheltenham Development Task Force. A number of other town centre sites are also considered to offer potential for redevelopment and enhancement of the retail offer in the centre, including an extension to the Beechwood shopping centre and the wider Brewery area.

Position in the sub regional hierarchy

The Management Horizons Europe (MHE) UK Shopping Index provides a useful benchmark to assess the change in a centre's retail ranking over time. The MHE Shopping Index provides information for ranking all major retail centres across the country up to 2008. No ranking data is available since 2008.

In 2008, the MHE Shopping Index ranked Cheltenham town centre as 25th in the country out of a total of 6,720 centres, and also considered the centre to be of a 'Major Regional' tier. This classification of tier is the second highest of all tiers behind 'Major City'. In the wider sub regional context of other 'Major Regional' centres, only Cardiff (21st) ranked higher than Cheltenham with Bristol and Bath ranked at 29th and 35th respectively. The Index ranked Gloucester at 70th in 2008.

In assessing change over time, the MHE Index ranked Cheltenham at 24th in 2003/04, and 2000/01 respectively, which confirms an overall consistent, well performing centre in the national context.

Diversity of town centre uses

The diversity of uses (at ground floor level) in Cheltenham town centre (as based on the information contained in the 2009 Goad Centre Report) identifies a centre with 666 units which account for over 141,000 sq. m of floorspace. Tables 1 and 2 summarise the retail composition of the centre in terms of outlet numbers and floorspace, with comparison to the national average. As part of this study, the Goad base data has been adopted and updated to provide a June 2011 snapshot which identified 669 units. An overview of the Montpellier Shopping Area and Lower High Street Shopping Area (not measured by Goad) is provided separately.

Table 1: Retail Composition by Outlets – Cheltenham town centre

Sector	No. of units (2009 Goad)	%of Retail Composition	UK Average %
Convenience	37 (35)	5.53	9.23
Comparison	317 (306)	47.38	41.89
Services	228 (212)	34.08	34.78
Miscellaneous	7 (13)	1.04	1.18
Vacant	80 (100)	11.95	12.92
TOTAL	669 (666)	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
2009 Goad composition provided (in brackets) and Goad national average
Source: DPDS (2011) and Goad (2009)

Table 2: Retail Composition by Floorspace – Cheltenham town centre

Sector	Total Floorspace Sq. m	% of Retail Composition	UK Average %
Convenience	7,256	5.14	17.35
Comparison	79,609	56.40	47.35
Services	32,674	23.15	23.05
Miscellaneous	1,598	1.13	0.99
Vacant	20,011	14.18	11.26
TOTAL	141,148	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Note: the above floorspace figures relate to the 2009 Goad data
Source: Goad (2009)

In terms of convenience outlets, there are 37 units in the town centre - a gain of 2 units since the 2009 Goad survey. This level of retail composition (5.53%) remains well below the national average (9.23%). Even adopting 2009 convenience floorspace totals, it is apparent that the town centre is significantly low, and is a third of the national average (17.35%). Despite the below average representation, the number of convenience units (and devoted floorspace) in Cheltenham town centre, as measured by the Goad Centre surveys and the DPDS survey has increased from 30 to 35 units over the period 2005 – 2009, and by an additional 2 units (2009 – 2011).

The convenience units in the centre include Tesco Metro and Iceland (High Street), together with Lidl (Grosvenor Terrace), and Marks and Spencer (food hall). A Waitrose is located at Honeybourne Way which represents the largest foodstore in the central area. Other convenience sub categories, as defined by Goad, are all represented in the town centre, although in all cases the six sub categories are under-represented when considered against the national average. In particular, the number of butchers and greengrocers & fishmongers is low, and is limited to one unit respectively for each sub-category. As noted in the 2006 study, the centre lacks a fishmongers, which remains the case. Despite a below average convenience offer, a Farmers Market is held fortnightly (every second Friday) on the Promenade. This sells locally produced or prepared meat, fish, vegetables, cheeses, eggs, pies, and other foodstuffs. In addition, a limited food stalls exist at the weekly comparison led market at Henrietta Street car park.

In contrast to the convenience sector, the number of comparison outlets in Cheltenham is significant and accounts for over 47% of all units in the centre. In total, there are 317 comparison units in the centre, which represents a gain of 11 comparison uses since the 2009 Goad survey. Notwithstanding this, Goad estimated the centre supported over 79,600 sq. m of floorspace, which represents 56% of all floorspace in the town centre, which is likely to have increased given the net gain in comparison uses. This level of comparison provision is typical of major centres with large catchment areas, as relevant to Cheltenham. The level of comparison units (47.38%) and floorspace (56.40% as at 2009 Goad) is above the national average for town centres of 41.89% and 47.35% respectively.

Given the strength of Cheltenham as a comparison retail centre, it is unsurprising that the centre has representation in all of the sixteen Goad comparison sub-categories. Fashion and clothing is well represented in the centre, with footwear, mens/boyswear, mixed/general clothing, and particularly womens/girls and childrens clothing all well above the national average. In total, these four fashion categories account for a third of total comparison units. Other above average levels of representation include the furniture, carpets, textiles; electricals and home entertainment; variety, department and catalogue stores; sports, toys and hobbies stores; and jewellers & clocks.

It is apparent that the actual proportion of comparison units and overall floorspace supported by these uses, and measured by the Goad report for the town centre, declined over the period 2005 – 2008 resulting in the loss of 43 comparison units and approximately 2,500 sq. m of floorspace. This trend however appears to have been slightly reversed as evidenced by the gain in comparison uses discussed above. It remains that such recent changes have not impacted on the performance of the centre, as confirmed by the MHE ranking of the centre, and its attraction to shoppers and the retail industry.

The role of Cheltenham as a services centre is confirmed by the high number of related units (228 in total) – an increase of 16 since the 2009 Goad survey which although as a proportion of total uses (34.08%) which is broadly consistent with the national average (34.78%). A significant number of restaurants, cafes, and fast food establishments exist in the centre, accounting for approximately half of all service uses in the town centre, although this is considered comparable with the national average of 15.7% of total retail composition of the centre. Other services uses which accord with the national average include hairdressing and beauty and estate agents. The provision of banks, financial services and building societies is considered broadly comparable with the national average, and further confirms the importance as a service centre for a wide catchment area. The only service use considered significantly under-represented in the town (in terms of outlets and floorspace) relate to launderettes and dry cleaners.

Montpellier

The Montpellier area is located to the south west of the town centre and is not designated within the Central Shopping Area but is located within the Core Commercial Area. It is also specifically defined as the Montpellier Shopping Area in the Local Plan. The centre does not form part of the 2009 Goad summary of the town centre provided above but must be considered part of Cheltenham town centre. In view of this, this study provides an overview of the composition of Montpelier which represents a long established shopping area in the context of the wider town centre.

The centre is characterised by its well preserved Regency architecture which represents a niche and distinctive retail environment. Many of the units are small although a relatively new development at the Courtyard (2 levels) has added to the attraction of the centre. The setting of the centre is enhanced by its proximity to Montpellier Gardens whilst the mix of speciality shops and food/drink uses create a unique and special retail experience which is attractive to local residents and visitors alike.

Table 3: Retail Composition by Outlets – Montpellier

Sector	No. of units	%of Retail Composition	UK Average %
Convenience	3	3.3	9.23
Comparison	44	49.43	41.89
Services	30	33.70	34.78
Miscellaneous*	0	0	1.18
Vacant	12	13.48	12.92
TOTAL	89	100	100

Adoption of Goad sector categories for consistency
*Miscellaneous includes employment and careers centres, post offices and information centres
Source: DPDS (2011) and Goad (2009)

In retail composition terms, Table 3 confirms that the defined centre supports 89 units although the main concentration is focused on comparison uses (44 units), which account for approximately half of all units in the centre. This is well above the national average and confirms the specialist, comparison offer in Montpellier. By contrast, the centre performs a limited convenience role and is restricted to 3 units which account for 3% of total composition. In regard to services, the composition of uses is broadly comparable to the national average, and accounts for approximately a third of all units.

A wide variety of speciality comparison uses are represented in the centre although there is a clear focus on up market and niche retailers. Women's fashion together with homewares and interior design, and speciality gifts dominate provision in the centre, with the majority of occupiers identified as independents.

The centre also supports a healthy level of service uses (30 units). The majority of uses are focused on food/drink operators (bars, restaurants) which add to the vibrancy of the centre together with a number of key services including estate agents and banks.

Lower High Street
The area is identified in the Local Plan as High Street West End, and relates to the western fringe of the town centre beyond the Ambrose Street/High Street junction. The centre falls within the Core Commercial Area and lies immediately west of the Core Shopping Area. The southern extent of Lower High Street (to Devonshire Street - south side, and to 377 Lower High Street, north side) is covered by the Goad report for the town centre and is included within the overall retail composition (and floorspace) summary of the town centre. To ensure a comprehensive overview of the entire 'town centre', a health check overview of the remainder of Lower High Street is provided.

Table 4: Retail Composition by Outlets – Lower High Street

Sector	No. of units	%of Retail Composition	UK Average %
Convenience	4	11.76	9.23
Comparison	10	29.41	41.89
Services	10	29.41	34.78
Miscellaneous*	4	11.76	1.18
Vacant	6	17.64	12.92
TOTAL	34	100	100

Adoption of Goad sector categories for consistency
*Miscellaneous includes employment and careers centres, post offices and information centres
Source: DPDS (2011) and Goad (2009)

Our survey identified an additional 34 units beyond the Goad plan (refer to Table 4). Of this total, a broad mix of provision exists in the centre which appears to serve for local residents and specialist retailers. This includes a number of specialist, ethnic independent stores, particularly for convenience uses, which account for 4 units (and exceed the national average). The level of comparison provision is more limited, accounting for 10 units which is almost 11% lower than the national average although a number of specialist non traditional comparison uses include garden machinery, tools car accessories and musical instruments. The service offer of the centre accounts for 10 units which is below the national average and is dominated by takeaway uses and a number of hairdressers.

Edge and out of centre provision
Cheltenham town centre is defined by a Core Commercial Area and a more tightly defined Central Shopping Area (CSA).

The Brewery retail and leisure complex is located in close proximity to the north west boundary of the CSA and represents an edge of centre location. It forms part of the Core Commercial Area and is anchored by an 11 screen Cineworld Cinema and Fitness First Health Club, the Brewery complex also includes a number of retail uses including Dwell together with a number of large vacant units, including the former Habitat unit, alongside food and drink establishments which complement the leisure destination of the site.

Out of centre comparison retail provision in Cheltenham is focused at Gallagher Retail Park and Kingsditch Retail Park. Other locations for out of centre operators include Tewkesbury Road, Hatherley Lane and Gloucester Road. In convenience terms, a large Asda is located at Hatherley Lane, together with Marks and Spencer Food and Sainsburys on Tewkesbury Road.

In the context of Lower High Street, the centre is located relatively close to a large Tesco together with the retail parks on Tewkesbury Road.

Retailer representation and retailer demand

In total, Goad identifies 271 multiple outlets in Cheltenham town centre which represent 40.69% of all units in the centre. This represents a very healthy level of multiple representation and exceeds the national average for town centres of 30.49%. The proportion of national multiple retailers tend to be higher in the larger centres; multiples are attracted by the large catchment populations of such centres and can afford the higher shop rents.

The strength of the multiple offer of the centre is further confirmed by the presence of major retailers. Of the 31 major retailers identified by Goad, 26 are represented in the town centre. Notable exceptions are John Lewis, H&M and Sainsburys.

In assessing retailer demand, the Focus database provides a useful indicator of retailer requirements. As at January 2010, Focus identified a total of 70 retailer requirements for Cheltenham, which placed the town as the 31st ranked centre nationally in terms of number of retailer requirements. This was lower than the 76 requirements identified in January 2009 and significantly lower than 2006 and 2007, when retailer requirements for the centre peaked at 142, ranking the centre within the top 20 by retailer requirements. Given recent economic conditions it is unsurprising that retailer requirements have fallen although the position remains that Cheltenham town centre continues to attract healthy levels of retailer demand, even in a challenging economic environment.

Local agents confirm a continued healthy level of retailer demand for Cheltenham, particularly from upmarket retailers, with most demand focused on the Promenade. The lack of suitable sized units and problems of unit configuration is considered an issue in the Promenade area, particularly given the high level of retailer requirements for the Promenade. Agents further report that demand in the town is also being driven by discount retailers, and to a lesser extent by the mid market traditional multiples.

Within Montpellier, retailer representation is characterised by specialist and niche offer dominated by independent occupiers. Given the high quality and up market independents led representation, the number of national multiples is limited to Bang Olufsen and the Co-op. A number of national chains of bars and restaurant exist in the centre also. Local agents consider that demand has dropped over the last year for Montpellier – a reflection of lower footfall and competition from the Promenade.

The Lower High Street is focused on a mix of independent retailers, providing for convenience, comparison and service uses. A number of the convenience uses provide for ethnic specialisms whilst a large number of the comparison uses are unique and distinctive. No national multiples are identified in the centre.

Retail rents and yields

Local agents confirm a Prime Zone A of £170/sq. ft (focused on the Promenade) and £140 - £150/sq. ft on the High Street. These headline figures have changed over recent years (circa 2005 onwards) with agents reporting a movement in the prime Zone A rents away from the High Street (circa £200/sq. ft - £210/sq. ft end 2005) to the Promenade (£140/sq. ft end 2005).

The evidence of local agents broadly accords with the Focus report for the centre which identified Prime Zone A rents to be £190/sq. ft (June 2009), which was slightly lower than the headline prime rents of £200/sq. ft identified in 2007 and 2008. Whilst there has been a slight fall when compared to the peak years, it is clear that Cheltenham has experienced a strong and broadly stable performance in prime retail rents. Overall, the performance of prime retail rents confirm a well performing town centre, which benefits from high and sustained levels of retailer demand and interest.

Commercial yields

The assessment of yields provides a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of the capital value. As a measure of retail viability, yields are a valuable indictor, but one that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time can give an indication of the direction in which a particular town centre is moving.

Historical information collated by the Valuation Office identify yields of approximately 6% over the period 1998 – 2005, strengthening to 5% in 2006 and 2007. The strength of the upmarket appeal of the Promenade is reflected in the sub 5% retail yields identified by local agents which is broadly comparable to past trends and reflective of a successful town centre. There is however a need for caution over recent years given that reliable yield evidence is limited by the general absence of transactional activity.

Vacant street level property

The Goad report identified 100 vacant units in October 2009. This accounted for over 15% of all units; higher than the national average of 12.9%.

Our survey of Cheltenham town centre in June 2011 identified 80 vacant units which comprises 11.95% of the total units. This represents a marked improvement since the 2009 survey with take up of 20 units over this period and a useful indicator of a well performing retail centre underpinned by good levels of retailer demand.

Within the Montpellier centre, a total of 12 vacant units were identified. This accounts for 13.4% of total provision which was marginally higher than the national average. Given the concentration of small units, dominance of up market specialist uses, and independent representation, the level of vacancy is considered realistic in light of economic conditions although there is a concentration of vacancies in the Courtyard development. On a positive front, it was noted that a number of vacant units were under offer or due to open which would appear to confirm a good level of retailer demand for the centre.

A total of 6 vacant units were identified in the Lower High Street (outside of the defined Goad plan area).

Pedestrian flows

In the absence of any up to date pedestrian flow data, we have had regard to the findings of the 2006 Retail Study which undertook a number of pedestrian counts in the town centre, focused on 10 survey locations. This confirmed the heaviest footfall to be on the High Street near Marks & Spencer (5,370 pedestrians per hour), with pedestrian activity steadily decreasing from this point in both directions along the High Street. To the south east, the survey confirmed a fall off in pedestrian footfall (2,500), at Natwest Bank, and further reductions to approximately 1,200 at the junction of Bath Road. Heading north-west from Marks & Spencer, pedestrian footfall was found to fall off markedly from circa 3,300 at Primark, to approximately 1,200 (junction with Henrietta Street), and approximately 600 at the Frog & Fiddle on Lower High Street. It is important to recognise that these surveys were undertaken prior to the opening of the Brewery development.

The same survey considered footfall associated with the two shopping centres, based on counts at their respective High Street entrances. Footfall at Regent Arcade (1,980) was identified to be approximately twice that at the Beechwood Shopping Centre (955).

In assessing pedestrian activity to the south west of the town centre, a count at the Promenade identified footfall of approximately 1,300 per hour, and a marginally lower level (1,100) at Ormond Place, near the south-western entrance to the Regent Arcade.

Within Montpellier, observations of footfall activity in the centre confirmed a good level of activity in both directions along Montpellier Road although in the majority of cases it appeared that there was little use of the centre's uses.

In Lower High Street, pedestrian activity was limited although activity seemed to focus on a number of the speciality shops in the centre.

Accessibility
Cheltenham is located 3 miles to the east of junction 11 of the M5 and is also served by junction 10 (restricted access). In addition, the A40 runs to the south of the town centre providing an east west link to Gloucester and Oxford and the wider strategic road network. A number of other major routes converge on the town centre including the A46, A435, and A4019

Car parking in the town centre is distributed throughout the centre, focused on ten car parks, providing over 2,660 spaces. These include a number of large multi storey car parks, including Regent Arcade (532 spaces), Grosvenor Terrace (452 spaces) and Beechwood Shopping Centre (372 spaces). Other large car parks include the surface level facilities at North Place (471 spaces) and Portland Street (329 spaces) together with St James Street (202 spaces) and Lower High Street/Henrietta St /St Margaret (126 spaces). Smaller sites exist at Chester Walk, Bath Road and Chapel Walk. In terms of location, many of the parking facilities are located to the north and east of the town which have implications for those visiting the centre and arriving from the motorways junctions to the west, given the need to negotiate the one way traffic system.

The number and frequency of bus services to the town centre are comprehensive, with centrally located stops in Royal Well, the Promenade and the western end of the High Street. A network of local services ensure good accessibility throughout the town centre including the following: Service A (GLOSCAT, Coronation Square, Centre, Prestbury, Lynworth); together with circular services to Charlton Kings, Springbank., Leckhampton, Benhall, Gallagher Retail Park (Service B, C, F and G H and J respectively), Service D (to Bishops Cleeve), Service K (to Hatherley) and Noverton Park (service N).

Good connections also exist to Gloucester (and Churchdown/Lower Tuffley) together with Stroud/Nailsworth/Forest Green; Cirencester/Swindon; and the Tewkesbury and Northway area.

The town is also currently served by two park and ride services, located to the north (race course – Service D) and west (Arle Court – Service 511) of the town centre respectively. These services run every 10 minutes during the general period 7am – 7pm.

The town benefits from a mainline railway station (Cheltenham Spa), located to the outside the town centre, approximately 1.5 miles to the west of the centre. This provides regular services between Bristol and Birmingham, together with other national connections. Bus services P & Q link with the town centre.

Opportunities for cyclists exist although there are no dedicated cycle routes within the town centre. It is noted that the traffic free route along the Ashchurch Road (A438) does not extend tot the town centre. Cycle stands are provided along High Street.

Pedestrian access in the town centre is considered good with large areas of the core shopping area pedestrianised along a number of sections on High Street, together with Promenade. In addition, the Beechwood and Regent Arcade provide dedicated indoor shopping centres, with the Regent Arcade providing a ‘shopping circuit’ with High Street, Promenade and Ormond Place. The Beechwood shopping Centre does not benefit from a similar shopping circuit. It is however recognised that the Inner Ring and Northern Relief Road have severance impacts on those walking and cycling to the town centre. An improvement in signage is also considered necessary and we understand this is due for a future review.

As noted in the 2006 study, issues continue to exist with regard to the one-way system at Clarence Street (to North Street) which dissects the High Street and which effectively represents a physical barrier for pedestrian movement in a pedestrianised environment. In perception terms, this may deter visitors venturing eastwards along the High Street. The same principles apply with regard to Rodney Road and Winchcombe Street, and the implications for pedestrian safety. Notwithstanding this, the 2011 Household Survey confirms a broad satisfaction with the ease of pedestrian movement around the centre, considered good by an average of two thirds of respondents from the five zones focused on Cheltenham.

Customer and residents views

In contrast to the Tewkesbury main centres, there is no dedicated user survey information available for Cheltenham town centre. However, to gain an understanding of shoppers views, regard is given to the findings of the 2011 Household Survey alongside comparison to the results of the 2006 Retail Study (and supporting household survey). For 2011, our analysis has focused on the comments of respondents from Zone 1 (Cheltenham) only:

- A third of respondents visited the centre once a week, with 29% visiting more than once a week;
- For Cheltenham zone residents, the car represented the most common form of travel to the centre (42%) although a high level walk (25%) or use the bus (21%);
- 89% of respondents considered the range and choice of non food shops in the centre to be good or very good;
- Similar satisfaction levels were noted with regard to the range and choice of service facilities;

- Lower levels of satisfaction were identified with regard to the choice and quality of supermarkets in the centre – 31% of respondents considered this be poor;
- Half of all respondents did not consider there was anything required to encourage them to visit Cheltenham more often although less expensive parking was identified by 15%, more parking (6%) and a more attractive town centre environment (6%). Overall, respondents appear happy with the town centre;
- Similar responses were recorded with regard to dislikes in the centre, with 48% confirming ‘nothing’. Despite this, specific dislikes focused on the lack/cost of parking (14%); unattractive environment and dirty streets/litter (12%), and interestingly, a lack of safety/security (6%).

When compared to the 2006 study results, it is apparent that little changes have occurred with an overall good level of satisfaction with the offer, performance and functioning of the town centre. The range and choice of non-food shops and services in particular continue to rate particularly well amongst respondents, as does the ease of movement around the centre. Similarly, relative dissatisfaction with the choice and quality of supermarkets together with the costs, and adequacy of parking arrangements remain the more negative comments from respondents.

In summary, the household survey results confirm an overall high level of satisfaction with Cheltenham town centre.

Perception of safety and occurrence of crime
As part of the 2011 Household Survey, respondents were questioned on the level of personal security and safety in the town centre. The results confirmed that in the five zones considered most appropriate as the catchment area for the town, over 70% of respondents in each zone considered Cheltenham to be very good/good with regard to personal safety and security. Within Zone 1 (Cheltenham), 71% of respondents considered the town as good, and 13% as very good in relation to this measure.

Overall, the perception of respondents is that Cheltenham town centre is considered a safe and secure destination for local shoppers.

Environmental quality of the town centre
An overriding feature of the attractiveness of the town centre is reflected in the environmental quality of the centre, based on a unique mix of historic Regency architecture, well used public open spaces and areas of soft landscaping with mature trees, well-designed street furniture, and public art. The town centre is well-maintained with shop frontages in a general good state of repair whilst the improvement of the quality of the public realm is an important objective of the Cheltenham Development Task Force.

As discussed in the introduction, the centre can be categorised by six distinct area, ranging from the Central High Street area – the focus for footfall and the national multiples, through to the more relaxed Regency shopping environments of Promenade and Montpellier. The environmental quality of the north west High Street is considered poor when compared to the central High Street and Promenade areas whilst the area of Lower High Street is characterised by untidiness and clutter (although this not detract from the attractive built environment). The south east High Street is considered to be reasonably attractive.

The area of the Promenade is considered particularly attractive, providing for a wide shopping street which provides an anchor for national multiple retailers, boutiques and cafes, and is complemented by mature tress and public art. The Promenade also hosts a number of important markets, including the Farmers' Market (twice a month) together with a Christmas Market. Similarly, in Montpellier, the local environment is considered attractive and distinctive, reflecting its Regency built environment, well maintained and attractive streetscape, and diverse mix of uses focused on Montpellier Street and Montpellier Walk.

The overall environmental quality of the town centre is generally very high although the area of around High Street, west of Clarence Street, has a lower quality environment, as does the area further west, past St George's Street and Ambrose Street. This specific area is considered of a generally poor quality with obvious signs of a lack of maintenance and low investment over recent years. Of particular concern is the area beyond Poole Way as a consequence of heavy traffic although the environmental quality does improve further towards High Street.

The 2011 household survey confirms the importance of the quality of the environment, with 89% of respondents in zone 1 (Cheltenham) identifying the environmental quality of the town centre to be good (67%) or very good (22%). Similar high levels of satisfaction (based on a good/very good rating) were identified by respondents in zone 2 (70%), zone 3 (84%), zone 4 (86%) and zone 5 (81%)

Health check conclusions

<u>Cheltenham town centre</u>
The town centre is considered to be a healthy and well performing centre, which benefits from its offer and attraction to visitors and shoppers, based on a retail destination of national importance. Most recently ranked as a top 25 centre, the town centre is focused on a comparison led offer which provides an excellent mix of major multiple retailers and independent occupiers, set within a number of distinct sub areas which contribute to a unique shopping experience. It is acknowledged that the convenience offer in the centre is more limited although it is apparent that Cheltenham offers a mixed range of retail, service and leisure opportunities as part of any visit to the centre.

Over the period October 2009 – June 2011, this study has confirmed a net increase in convenience, comparison and service uses in the centre, largely attributed to the take up of vacant units. A marked improvement in the vacancy rate is apparent. The 2009 Goad report identified a relatively high number of vacant units (100) although this has fallen by a fifth (20 units) since the last survey. This represents a solid indicator of a well performing centre set within a difficult economic climate.

Retailer demand for the centre remains healthy and is reflected in the levels of interest in the centre, and the consistently high rental levels secured. Local agents confirm the healthy level of retailer demand in the centre, particularly for the Promenade. This is further reflected in the prime Zone A rents which are focused at the Promenade but which were previously focused on High Street. The centre also benefits from two defined shopping centres, particularly the Regent Arcade which provides an important linkage between the central High Street and the Promenade.

The key issue will be to maintain and enhance its offer as the top performing retail centre in the JCS area balanced alongside the ongoing economic climate and the evolving nature of retailer requirements. The general lack of large retail units is an issue although the centre benefits from a number of identified development sites which offer scope for additional floorspace.

Montpellier
Montpellier is considered a distinctive and generally successful centre which offers an independent, niche and up market comparison retail provision not available in the town centre. Approximately half of all units are in comparison uses whilst the centre also supports a healthy level of services (focused on restaurants and bars) which complement the shopping experience.

There are signs that some shops are experiencing difficulty as a result of the general economic climate, with limited opening whilst the relatively high overall vacancy rate (13.5%) arises from the number of vacant units in the Courtyard, which could be attributed to low pedestrian flows and the specialist destination of the scheme. However, as a centre, there are considered no sites for further development and redevelopment is not an option.

The centre represents an easy walk from the town centre and greatly adds to the range of goods and variety of the town centre. Montpellier is a significant and positive asset to the town and any current weaknesses are likely to be related to the general economy and the centre will recover from this with national economic recovery. It is considered desirable that the centre should retain its distinctive character derived from the specialist, independent retailers.

Lower High Street
The centre is considered remote from the town centre and serves a dual role as local centre and as a location for specialist shops (both convenience and comparison) reliant on low rents.

It has clearly suffered a lack of investment over a long period but there are signs of recent investment and improvement stretching out from the High Street end which contributes to an enhanced environmental quality at the southern extent of the shopping area.

There is considered a need for action to improve the centre although it is recognised that a major constraint is the fragmented nature of land ownership. That aside, there is scope for public realm improvements to encourage further investment along the street. There is considered little prospect for significant improvement to the area beyond Poole Way largely as a consequence of traffic levels and it is recommended that the Lower High Street shopping area is redefined to exclude this area.

Bath Road District Centre

Centre overview
The Bath Road District Centre represents one of three Cheltenham District Centres and is the largest of the three.

Bath Road is located on a key arterial route into the town centre, with its designated retail area located approximately 0.6 mile (1 km) south of the Cheltenham town centre. Provision is focused along Bath Road, from Kew Place in the north to the junction with Norwood Road, Leckhampton Road, and extends into the northern extent of Shurdington Road. The centre falls entirely within a Conservation Area and is characterised as a traditional linear High Street of terraced shops (with residential over) interspersed with modern development.

The 2006 Retail Study concluded the following for the district centre:

The centre is relatively vital and viable. There is no clear identified need and little opportunity for further development or expansion of the centre. Traffic is intrusive and measures which improved the pedestrian environment would benefit the centre (paragraph 7.56).

Diversity of district centre uses
The 2006 study identified 77 shops and service units in the district centre.

As part of the 2011 study, an updated survey of the centre has been undertaken. The retail composition of the centre is set out in Table 1. For comparison purposes, the 2006 retail composition of the centre is included.

Table 1: Retail Composition by Outlets

Sector	No. of units (2006)	% of Retail Composition at 2011	Goad UK Average %
Convenience	13 (11)	16.45	9.23
Comparison	24 (25)	31.64	41.89
Services	33 (33)	41.77	34.78
Miscellaneous*	8 (6)	10.12	1.18*
Vacant	1 (2)	1.26	12.92
TOTAL	79 (77)	100	100

* Miscellaneous includes employment and careers centres, post offices, information centres
Source: DPDS (2011) and Goad (2009)

In retail composition terms, the centre has good provision of convenience stores, which account for 13 units (16%) of total provision. This is well above the national average of 9.2% and represents an increase in convenience provision by 2 units since the 2006 study. A number of the convenience units also represent the largest units in the centre, including a Co-op, Sainsburys, grocery store and off license. A number of independent convenience operators also exist, including two butchers, bakery, deli, off licenses, convenience ready meals, CTN/Post Office and health food.

A total of 24 units are identified as selling comparison goods; this represents a reduction of 1 unit since the 2006 study and accounts for slightly less than a third of total composition (31.6%). This is 10% lower than the national average although this is unsurprising given its proximity to the town centre which offers a substantial comparison offer and is compensated for by the above average representation from the convenience and services offer available in the centre. Analysis of the mix of uses confirms a broad range and diversity of non food offer ranging from cookware, homeware and furniture through to two toys/gifts stores, two pharmacies and five charity stores.

The level of services in the centre is high (33 units) and accounts for 41% of the overall composition of the centre. A variety of service uses exist with good representation from fast food/takeaway uses together with estate agents and hairdressers together with two banks

Edge and out of centre provision
The centre is located in close proximity to Cheltenham town centre. Cheltenham supports a good level of out of centre provision focused along Tewkesbury Road (refer to information contained in the Cheltenham town centre assessment).

Retailer representation and retailer demand
The centre contains a healthy level of independent retailers although national multiple representation is almost entirely concentrated on convenience uses, including Sainsburys and Co-op. Comparison retailers are dominated by independent operators with the exception of the national charity shop chains. The focus for national representation is concentrated on the service uses.

The low level of vacancy rate and good level of independents in the centre confirm a good level of interest in the centre. This is confirmed by discussions with local agents who consider Bath Road to be a vibrant and healthy centre which offers a good range and mix of uses for the local population. The convenience and service led offer is reflective of its proximity to the comparison led facilities of the town centre.

Retail rents and yields
Given the lack of recent transactional activity, details of retail rents and yields are not known.

Vacant street level properties
The 2011 survey of the centre identified an extremely low level of vacancy rate (1.26%) which equated to one unit. The 2006 study identifies 2 vacant units (3%) of total units which confirms an improvement over the period albeit reinforcing the healthy nature of the centre from a vacancy perspective. This is substantially lower than the national average (12.9%).

Pedestrian flows
No information on pedestrian flows is available for the centre. However, as part of the survey, observations of the centre confirmed very good levels of footfall activity along Bath Road. This reflects the linear nature of the centre.

Accessibility
An important characteristic of the centre is its accessibility; Bath Road represents one of the key route ways into Cheltenham. The NEMS Household Survey confirms good accessibility to the centre by car with 75% of respondents considering this to be good/very good. Public transport services via bus are also comprehensive given its role as a main arterial route. Regular bus services into Cheltenham include service 46 together with service 99.

Car parking in the centre is considered limited. The inadequacy of off street parking has previously been recognised in the centre whilst the importance of the roadway can create congestion at peak periods. Interestingly, the 2011 Household Survey identifies general levels of satisfaction with parking arrangements with 75% of respondents stating parking arrangements to be good/very good the centre.

Customer and residents views

The 2006 Household Survey identified that 47% of the residents who identified Bath Road as their nearest district centre, use the centre for food shopping at least once every two weeks. However, over a quarter of respondents (28%) never use the centre for food shopping purposes. The 2011 household survey identified that 25% of respondents never use the centre for food shopping – a marginal improvement over the 2006 position whilst 25% use the centre at least once a week, and 34% once a month, for food shopping respectively.

By contrast, the frequency of use of the centre for comparison shopping purposes is lower, with nearly a quarter (23%) stating they never use the centre for such purposes, and over half (57%) stating use of the centre for non food shopping once a month or less. Compared to the 2006 survey, it would appear that of those respondents who use the centre, there has been a improved frequency of use of the centre for comparison shopping purposes. In terms of services, over 40% never use the centre for such uses whilst the centre is not considered a leisure destination (80% of respondents stated they never used the centre for such activities).

In terms of the perception of the Bath Road centre, respondents identified overall satisfaction with the range/quality and choice of non food shops and supermarkets; over 70% stated good/very good rating for comparison uses and over 80% for supermarkets. Over 80% of respondents also considered the range and quality of service facilities to be good/very good.

Perception of safety and occurrence of crime

Respondents to the 2011 Household Survey stated that the centre was considered a safe centre. Over 27% of respondents considered the level of personal security and safety to be very good whilst over 61% considered it to be good. Overall, the centre is considered a safe and well used centre for shoppers and visitors with good levels of natural surveillance given the nature of Bath Road as a key arterial route.

Environmental quality of the district centre

The centre is considered an attractive, well-kept and well used retailing environment. Whilst the two-way traffic along Bath Road can be busy, driving speeds are generally low. A number of recent environmental enhancements are also evident in the centre.

The good environmental quality of the centre is confirmed by the finding of the household survey. Over 72% of respondents stated the quality to be good with a further 23% considering the environmental quality of the centre to be very good.

Whilst there is a general satisfaction with the environmental quality of the centre, a number of initiatives are underway to address highway safety, environmental improvements and a car parking review (with potential to introduce free, short stay parking on street).

Health check conclusions

The level of convenience and service offer in the centre is well above the national average although the proportion of comparison uses is less (although this reflects its proximity to the town centre). In total, the centre supports 79 units of which only one unit is identified to be vacant – a broad indicator of a healthy centre.

Whilst the size of the centre is relatively large, this does not appear to have impacted on the performance of the centre despite the vulnerability of many retail centres in the current economic climate. Despite its relative strength, and attraction to independent traders, it is considered scope exists for additional ‘retailing anchors’ to enhance and consolidate the continuing success of the centre whilst the size of the centre offers good opportunities for attracting further comparison representation, which is currently largely limited to convenience and service uses.

Overall the environmental quality of the centre is considered good whilst customer perceptions of the centre, as evidenced from the 2011 Household Survey, indicate a broad level of satisfaction in terms of the range, offer and role of Bath Road. The centre also benefits from good levels of accessibility whilst the linear configuration provides a defined and contained retail parade, although it is considered that opportunities exist to improve the availability of convenient, cheap car parking in the centre. This issue is currently under review together with other initiatives to address environmental improvements (e.g. planting) and highway safety. In summary, Bath Road is considered a well performing, busy and attractive district centre.

Coronation Square District Centre

Centre overview
The Coronation Square District Centre is located 1.5 miles (2.5km) to the west of the town centre. The centre is the second largest of the three District Centres and is located off Princess Elizabeth Way which provides an important linkage between the A40 and A4019. The centre provides an important facility for residents to the west of the town centre, particularly for the residents of Hesters Way.

The centre is characterised as a 1970's purpose built shopping precinct with retail units at ground floor level and one to two storey development over the units, typically occupied for office or residential uses. A large car park exists to the rear of the centre off Amberley Road whilst a number of pedestrian walkways provide linkages through the centre.

The 2006 Retail Study concluded the following for the district centre:

The centre is struggling in terms of its vitality and viability and is in need of modernisation. The area around the centre is being improved with the new Gloscat campus and housing regeneration. It is considered that the centre is physically too large for its current function and its redevelopment should be encouraged. The centre should be anchored by a foodstore, as it is now, with a range of other shops and services of a scale appropriate to its intended role in meeting the needs of residents on the western side of Cheltenham. Residential and office development as part of any redevelopment proposals would be welcome as they would contribute to the vitality of the centre (paragraph 7.59).

Over recent years, the centre has been subject to developer interest to redevelop the centre which may in part account for the current health and performance of the centre in terms of retailer demand and business confidence. Given the need for redevelopment, the site is subject to consideration by the Cheltenham Development Task Force.

Diversity of district centre uses
The 2006 study identified 35 shops and service units in the district centre. The same study estimated the total floorspace of the centre to be 2,227 sq. m; the smallest of the district centres in floorspace terms.

As part of the 2011 study, an updated survey of the centre has been undertaken which has identified 42 units. The retail composition of the centre is set out in Table 1 for comparison purposes, the 2006 retail composition of the centre is included.

Table 1: Retail Composition by Outlets

Sector	No. of units (2006)	% of Retail Composition at 2011	Goad UK Average %
Convenience	4 (5)	9.52	9.23
Comparison	5 (10)	11.90	41.89
Services	12 (9)	28.57	34.78
Miscellaneous*	2 (2)	4.76	1.18*
Vacant	19 (9)	45.23	12.92
TOTAL	42 (35)	100	100

* Miscellaneous includes employment and careers centres, post offices, information centres
Source: DPDS (2011) and Goad (2009)

In retail composition terms, significant changes have occurred since the 2006 study. Whilst the overall number of units has increased, the overall quality of retail provision has declined significantly with net losses of convenience (1 unit), comparison (5 units) and a marked increase in vacant units (up by 10). By contrast, the number of service uses has increased.

The centre supports an acceptable level of convenience units focused on 5 units (9.5%) of total provision. This includes two supermarkets – Co-op and Farmfoods, together with a greengrocer and off licence.

By contrast, only 5 units are identified in comparison use (11.9% of total provision). This is seriously low and has fallen by 50% since the 2006 study. The only comparison uses in the centre relate to an optician shop, charity shop (two in total), pharmacy and an angling store.

The level of service uses in the centre has increased since 2006 to 12 units. This accounts for 28.5% of total provision, with the majority of uses focused on cafes, takeaway outlets, bookmakers and pawnbrokers.

Edge and out of centre provision

There is no existing edge of, or out of centre provision relevant to the district centre.

A large Asda superstore has recently opened at the former Woodward International site on Hatherley Lane. The foodstore provides for over 6,900 sq. m gross (3,800 sq. m net). There remains major uncertainty as to the extent to which this proposal will impact on previous regeneration proposals for Coronation Square.

Retailer representation and retailer demand

The centre contains a number of national multiples which include the Co-op, Farmfoods, Greggs, Lloyds Pharmacy and a number of national charity shops.

Discussions with local agents active in Cheltenham confirm that the centre represents a dated retail precinct which is considered excessive and unsuitable for modern retailer and commercial needs. The high level of vacant units and overall poor environmental quality are considered major issues although continued uncertainty over the redevelopment of the centre act as major constraints for securing retailer interests and a commitment to the centre.

Retail rents and yields

Details of rents and yields are not known given lack of recent transactional activity.

Vacant street level properties

The 2011 DPDS survey of the centre identified 19 vacant units out of a total of 42 units in the centre. This equates to 45% of total units. The 2006 Retail Study identified 9 vacant units; 26% of total outlets.

The level of vacancy is considered serious and reflective of the overall performance of the centre. It is considered the uncertainty associated with redevelopment proposals have greatly contributed to the increase in vacancy rates although it remains that the centre is in need of priority attention.

Pedestrian flows

No information on pedestrian flows is available for the centre. However, as part of the DPDS survey, pedestrian activity confirmed low levels of footfall along Edinburgh Place whilst the car park to the rear has low levels of usage.

Accessibility
Access to the site is considered good. The availability of car parking in the centre is considered good although the parking is hidden to the rear of the centre and does not benefit from natural surveillance.

Public transport services are considered good.

Customer and residents views
The NEMS household survey sought to establish the views of users of the centre who identified Coronation Square as their nearest smaller shopping centre in Cheltenham. The declining role of the centre is reflected in the limited use of the centre by respondents with only 14% and 7% using the centre for non food, and food shopping respectively more than once a week. The majority of respondents never used the centre for shopping purposes, with 57% never using for food shopping purposes, and nearly two thirds (64%) never using the centre for non food shopping purposes. The decrease in comparison composition confirms this position whilst the absence of service use of the centre is more pronounced; 92% of respondents never use the centre for services although this confirms the lack of service offer (e.g. banks, post office) with uses focused on takeaways, pawnbrokers and bookmakers.

Similarly, the majority of the same respondents considered the range and choice of comparison shops to be poor/very poor (50%) with a similar level considering the choice and quality of supermarkets to be poor/very poor. By contrast, positive comments focused on the good level of accessibility to the centre by public transport and car, together with a good adequacy of parking, and pedestrian movement around the centre. The quality of the local environment received a mixed reaction although half of respondents considered it poor/very poor.

Perception of safety and occurrence of crime
The household survey sought to assess the level of personal security and safety at the centre from respondents. Whilst 28% considered this to be good/very good, 42% considered it to be poor/very poor. The majority answer did not form an opinion on safety issues.

Our observations from the site survey did not consider the centre to be unsafe but rather the perception of dereliction from the vacant units and relatively poor pedestrian links offer scope for improvements which would reinforce the perception of safety (and use) of the centre.

Environmental quality of the district centre
Whilst the centre is considered tidy, the overall quality of the built environment is very poor. Landscaping in the local area is minimal with the impact of long term derelict properties impacting on the overall health and appearance of the retail centre.

Health check conclusions
The centre is clearly struggling and does not display a healthy level of vitality and viability. Whilst a number of multiple retailer representation (e.g. Lloyds Pharmacy, the Coop and Greggs), together with the discount convenience retailer Farmfoods act as key attractors, the vacancy rate and, in particular, the level of long term vacant units clearly demonstrates a low level of business confidence in the centre.

The number of vacant units in the centre account for almost half (45%) of all units and has increased by 10 units since the 2006 study. This is clearly a major indicator of concern. It is recognised that major uncertainty associated with the regeneration of the centre has contributed to the increase in vacancy levels although there is a crucial need for investment and enhancement notwithstanding the implications of the recent opening of the large Asda superstore at Hatherley Lane.

Other issues include the enclosure of the centre by a number of busy roads which inhibit convenient pedestrian links. The walled car parking to the rear does not benefit from natural surveillance nor does it appear well used. There is a requirement for enhanced pedestrian and vehicular links which would contribute to the success of the centre.

In summary, it is considered the centre is not fulfilling its retail function for the local catchment and there is a clear need to reduce the level of retail floorspace at the centre and to encourage the introduction of complimentary new uses, such as residential, office and leisure uses. It is envisaged the involvement of Cheltenham Development Task Force will help to ensure the site remains a priority site for regeneration.

Caernarvon Road District Centre

Centre overview
The Caernarvon Road district centre is the smallest of the Borough's designated district centres in unit terms. Located to the south of the town centre, the centre is situated within a large, modern residential area and is accessed from Caernarvon Road, which itself is linked to Uphatherley Way which abuts the southern boundary of the centre. The centre is dominated by a large Morrisons foodstore and a parade of adjoining retail units to the north of the Morrisons store. A large area of surface level parking exists to the front of the units.

The 2006 Retail Study concluded the following recommendations for the district centre:

A popular centre for food shopping. Proposals to broaden the range of shops and services in the centre should be encouraged. However, such uses should be appropriate in scale to the role of the district centre which predominantly serves the southern part of the Borough. There appears to be some scope, physically, for expansion or reorganisation to increase the amount of floorspace in the centre (paragraph 7.58).

Diversity of district centre uses
The centre represents a small centre which totals 6 units and is significantly smaller than the other district centres in Cheltenham at Bath Road (79 units) and Coronation Square (42 units).

The retail composition of the centre is set out in Table 1. For comparison purposes, the composition of the centre from the 2006 Retail Study is included.

Table 1: Retail Composition by Outlets

Sector	No. of Units	%of Retail Composition	Goad UK Average %
Convenience	2 (2)	33.33	9.23
Comparison	2 (2)	33.33	41.89
Services	1 (1)	16.66	34.78
Miscellaneous	1 (1)	16.66	1.18
Vacant	0 (0)	0	12.92
TOTAL	6 (6)	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Source: DPDS (2011) and Goad (2009)

In terms of retail composition, there has been no change in the number of outlets at the centre which total 6 units or the diversity of the retail mix.

The centre has an equal mix of convenience and comparison units (2 of each) although the largest unit at the centre is Morrisons, which acts as the anchor store. It also accounts for the majority of the centre's floorspace, which was estimated as part of the 2006 study to be 3,424 sq. m. This is larger than the floorspace at Coronation Square. In addition to the Morrisons store, other uses include a newsagents, clothing, car accessories and dry cleaners.

An extension to the Morrisons unit (660 sq. m) is currently under construction.

Edge and out of centre provision
There is no edge of centre, or out of centre of significance in the district centre. A public house, primary school and library are located in close proximity to the district centre.

Retailer representation and retailer demand
The Morrisons store represents the only national multiple in the centre. All other units are occupied by independent occupiers.

Discussions with local agents active in Cheltenham confirm the dominant role of the Morrisons store although there is recognition that the centre functions effectively and serves a large residential area.

Retail rents and yields
Given the lack of recent transactional activity, details of retail rents and yields are not known.

Vacant street level properties
The 2011 survey of the centre confirmed no vacant units at the centre which accords with the position at 2006.

Pedestrian flows
No information on pedestrian flows is available for the centre. However, as part of the DPDS survey, pedestrian activity appeared steady at the centre with activity focused on shoppers using the Morrisons store.

Accessibility
Although the centre serves a large surrounding residential, area, the centre acts as a car orientated destination given the large available car park, and the attraction of the centre as a main food shopping facility.

Public transport services (us services) run along Caernarvon Road Route D).

Customer and residents views
The 2011 NEMS Household survey provides an indication of local user's views on the centre. The nature of the facility is reflected in the high levels of satisfaction with regard to accessibility by car, the adequacy of parking arrangements and also the quality of the environment. The limited range and choice of leisure/entertainment facilities were considered a weakness.

Detailed comments were provided as part of the 2006 Household Survey (given its Borough focus only). For respondents that identified the Caernarvon Road district centre as their nearest centre, nearly three quarters (71%) stated that they use the centre frequently for food shopping. This is unsurprising given the dominance of the Morrisons unit and the general absence of alternative facilities in the local area. Aside from the attractiveness for convenience shopping, the limited number and availability of other uses is reflected by the lower number of respondents who use the centre for other purposes; 42% of respondents use the centre for non-food shopping (42%), 33% for services, and 21% for leisure activities. This latter category is likely focused on the public house (located outside the defined district centre boundary).

Perception of safety and occurrence of crime
There are no concerns with regard to safety which reflects its role as a modern superstore led district centre. The NEMS Household survey did not identify any concerns with regard to personal security and safety.

Environmental quality of the district centre
The centre is characterised as well kept and maintained although the site is dominated by a large superstore and associated parking. It is considered opportunities for soft landscaping could enhance the immediate environment.

Health check conclusions
The district centre is anchored by Morrisons which dominates the centre and provides a number of small modern units to complement the main convenience role of the centre. The superstore is currently subject to extension works which will consolidate its role and offer.

The centre is well used and is located in close proximity to a number of important community uses. The enhancement of pedestrian links with the community uses would be beneficial although it is apparent that the centre is well used by visitors travelling by car.

TEWKESBURY BOROUGH COUNCIL

Joint Core Strategy Study Centres

Tewkesbury Town Centre

Centre overview

Tewkesbury is the largest settlement and shopping centre in the borough and is characterised as a historic market town. Located approximately 11 miles to the north of Cheltenham, the town centre is easily accessible from the M5 (junction 9) and represents an important administrative centre which also serves a wide rural hinterland. In 2001, the town had a population of 9,978. The Rivers Severn and Avon converge at the town.

The town centre retains its historic character which is reflected in the older retail stock and the good level of representation from small, independent retailers which provides diversity and mix of retail uses alongside service and tourist related uses. The core retail area is focused on High Street together with the northern section of Church Street and the western extent of Barton Street.

The town centre supports a twice weekly market (wednesday and saturday) at Spring Gardens car park. Redevelopment in the centre has been limited with new provision focused at Bishops Walk at the northern end of High Street.

Position in the sub regional hierarchy

The Management Horizons Europe (MHE) UK Shopping Index provides a benchmark for ranking all major retail centres across the country. The Index includes town centres, stand alone malls together with retail parks and outlet centres and ranks centres on the basis of various factors, including multiple retailer representation and presence of anchor stores. In the context of Tewkesbury, the 2004 UK Index ranked the town centre as 565th.

Diversity of town centre uses

The diversity of uses (at ground floor level) in Tewkesbury town centre is based on base information provided by the most recent Goad survey of the town centre (October 2009). This baseline position has been updated to take account of changes as at the time of the DPDS survey in June 2011.

As at the June 2011 survey, the centre contained 188 units. Tables 1 and 2 summarise the retail composition of the centre in terms of outlet numbers and floorspace with comparison to the national average (as measured by Goad).

Table 1: Retail Composition by Outlets

Sector	No.of units	%of Retail Composition	UK Average %
Convenience	17	8.90	9.23
Comparison	86	45.02	41.89
Services	59	30.89	34.78
Miscellaneous	5	2.62	1.18
Vacant	24	12.56	12.92
TOTAL	188	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Source: DPDS (2011) and Goad (2009)

Table 2: Table 2: Floorspace by Retail Composition

Sector	Total Floorspace Sq. m	% of Retail Composition	UK Average %
Convenience	4,459	16.66	17.35
Comparison	11,854	44.29	47.35
Services	7,098	26.48	23.05
Miscellaneous	492	1.84	0.99
Vacant	2,871	10.73	11.26
TOTAL	26,765	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Source: Goad (2009)

The 2011 retail composition of the centre is considered broadly comparable to the national average as measured by Goad. Convenience units account for approximately 9% of provision (17 units) although the actual proportion of convenience floorspace (16.6%) is slightly below the national average of 17.3%. Within the convenience category, there is an above national average representation in butchers, bakers, grocers/frozen foods and, ‘greengrocers and fishmongers’ sub category (although the reality is the town does not have a fishmongers). By contrast, off licences, and particularly convenience/CTN are underrepresented. Tesco Metro and Co-op represent the main supermarket offer in the centre whilst the Marks and Spencer Simply Food has been lost from the High Street. At the time of the 2011 survey, there has been no net change in the number of convenience uses since the 2009 Goad survey of the town centre.

In 2011, the comparison provision in the town centre totalled 86 units – 45% of total town centre outlets. This represents an increase of 6 units since the last Goad survey and is higher than the Goad national average (41.8%).

In floorspace terms, and adopting the 2009 baseline Goad figures for the town centre, comparison floorspace accounted for 44.3% of the centre which is lower than the Goad national average. However, since 2009, it is anticipated that an increase in comparison floorspace has occurred in the town centre given the net increase in comparison uses established by the 2011 survey.

With regard to the representation of the comparison sub categories, two are absent from the centre (mens and boys wear, and variety, department and catalogue). In clothing terms, three of its four sub categories (footwear/repairs, mixed & general clothing, and mens/boys) are either below (or absent) when compared to the Goad national average. This lack of clothing offer is confirmed by our site survey with national multiple representation limited to Dorothy Perkins. Other underrepresented comparison sub categories in the town centre include gifts, china, glass and leather good (1 shop), sports/toys/hobbies (3 shops) and cars/motor accessories (2 shops). By contrast, the centre has an above national representation in furniture/carpets/textiles (11 shops out of 80 in total), chemists/toiletries/opticians (9 units) and charity/pet/others (10 shops).

The 2011 survey identified a total of 59 services units in the town centre. When compared to the Goad base information, this accounts for less than one third of total units (30.9%), which is below the Goad national average of 34.8%. All of the Goad services sub categories are present in Tewkesbury town centre, with over representation in travel agents (3 units) and estate agents/auctioneers (9 units) and a slight under representation in restaurants/cafes/fast food, together with hairdressing/health and beauty, and building societies. Given the tourist role of Tewkesbury, it is surprising that the centre has an under representation in the restaurant/café sub category. The level of representation of banks and financial services (8 units in total) accords with the Goad national average. Overall, the 2011 composition survey confirms that a range of service uses exist in the town centre.

The town centre contains a number of important non retail uses which contribute to the vitality and viability of the town centre. This includes the Roses Theatre and the library on Sun Street, together with town council offices, health centre and museum.

Edge and out of centre provision

The main convenience provision in the town is provided at Morrisons, located off the A438 Ashchurch Road. The store, which includes a petrol filling station and café, is located to the east of the town centre and occupies an out of centre location. An Aldi store is under construction at Gloucester Road. Both these locations are located out of centre.

The town does not benefit from any traditional retail warehousing although a number of trade counter units exist at the Tewkesbury Business Park (Jewsons, Plumb Centre Building and Plumbing Supplies, Tewkesbury Tool Centre) and Bredon Road (Travis Perkins, Handyman Centre). These uses primarily serve the DIY trade market.

Retailer representation and retailer demand

The presence of multiple outlets in Tewkesbury town centre is identified by Goad to be 52 units (27.2%). This is over 3% lower than the national average of 30.5%. Similarly, Goad identifies 31 major retailers of which only 6 are identified in Tewkesbury (Boots, Clintons, Dorothy Perkins, Phones 4U, Superdrug, Tesco and WHSmith). It is notable that the town centre does not contain many of the national multiplies although this reflects the relatively small size of the centre.

In assessing retailer demand, the Focus database provides a useful indicator of retailer requirements albeit it is dominated by large national multiples and can include more than one requirement for a retail centre and is often based on a national floorspace requirement rather than a centre specific requirement. As at January 2010, there were 12 retailer requirements for Tewkesbury which has dropped from a peak of 23 identified requirements in October 2007. The fall in requirements is likely a reflection of economic conditions but also in the case of Tewkesbury, a reaction to the substantial floods of 2007 which significantly impacted on the town centre.

Discussions with local property agents confirm a stable level of enquiries within the centre primarily focused on local and small multiples requirements although overall agents consider there to be limited multiple demand. A number of agents highlighted the difficulty in securing new retailers given the unsuitability and small size of premises in the town centre – a reflection of the historic configuration of the centre and listed buildings which do not provide the flexibility for modern retailer requirements. Given the absence of unsuitable units, a number of agents identified scope to consolidate existing units to form larger floorspace. The impact of the floods from 2007 was also considered to have impacted on the investment perception of the town. In addition, the proximity of larger competitor centres at Gloucester and Cheltenham has implications for securing retailer interest in Tewkesbury, whilst agents also identified competition from Evesham for retailer requirements. The closure of the Marks and Spencer Simply Food use was considered a loss for the centre by commercial agents.

Retail rents and yields

Information from local agents active in the town confirm that the prime Zone A as £40/sq. ft.

This is comparable with the Focus report for the centre which identified Prime Zone A rents to be £35/sq. ft in June 2008, a position confirmed by the Hyder study which identified Prime Zone A rents in the range £35 - £40/sq. ft with rents in the secondary retail area identified to be £25/sq. ft. It is apparent that historical rents in the town centre confirm that the headline Zone A rent has remained relatively stable. This is considered unsurprising is view of the recent stability of the town centre albeit a reflection of its position in the sub region al shopping hierarchy.

No up to date information on retail yields for Tewkesbury is available although information provided by the Valuation Office confirms that over the period 1998 – 2006, commercial yields have remained relatively stable in the range 8% – 8.5%. In comparison to the neighbouring centres of Gloucester and Cheltenham, Tewkesbury has experienced a higher yield – which indicates a lower level of investment confidence in the centre when compared to its larger, competitor centres. In conclusion, the yield profile for Tewkesbury is considered reflective of the nature of the centre.

Vacant street level property

The Goad report (October 2009) identified 26 vacant units. This accounted for 13.6% of all units and 2,871 sq.m of floorspace. This was marginally higher than the national Goad average in 2009 of 12.9%.

By way of comparison, the DPDS survey of Tewkesbury town centre in June 2011 identified 24 vacant units – a reduction of 2 vacant units compared to the 2009 survey which comprise 12.5% of the total outlets. This is an improvement compared to the 2009 survey and is broadly comparable with the Goad national average. It is considered encouraging in view of the ongoing difficulties faced by town centres due to prevailing economic conditions. Overall, this confirms a resilient performance by the town centre.

Of the vacant units identified from the 2009 survey, there is evidence of a good turnover of vacant units in the town centre, with 11 of those previously listed as vacant now occupied, including a number of new comparison uses on High Street, Barton Street and Church Street. By contrast, a number of the previous vacant units in the secondary frontage have been lost to residential use.

Pedestrian flows

In July 2010, a pedestrian footfall survey was undertaken in Tewkesbury by Hyder Consulting. The survey was undertaken to allow comparison with previous surveys from June 2008 and July 2009, and focused on weekday, weekend and market day (for three specified time periods – am, lunchtime and pm).

Based on 5 survey sites in the town centre focused on the primary and secondary retail frontages, the weekend remained the highest footfall period (18,753) whilst market day attracted more pedestrians (17,361) compared to a regular weekday (15,720). The 2010 survey confirmed that whilst overall footfall increased by 7% during the ‘average’ weekday, footfall fell on a market day (-11%) and weekend (-16%) surveys respectively, in comparison to the 2009 data. A notable change also related to the reduction in pedestrian flows at Bishops Walk by up to a third when compared to the 2009 market day and weekend. The survey did however note works in Bishops Walk although this did not prevent access whilst the relocation of public toilets was also considered a contributory factor in footfall reduction around Bishops Walk. In the majority of cases, footfall activity was higher than the 2008 survey. Of the 2010 footfall locations, the Southern High Street recorded the busiest footfall with the lunchtime survey period the peak pedestrian footfall for the majority of sites on all survey days. The 2010 survey concluded that Bishops Walk, and to a lesser extent Northern High Street had experiences reductions in footfall compared to previous surveys, although market days remains important for both locations in generating footfall activity.

The DPDS survey of the centre observed the highest pedestrian flows along High Street with the Tesco Store, Boots, Costa Coffee and the Roses Theatre acting as key attractors in the north of the High Street. Pedestrian flows were observed as lower along Barton Street and Church Street, although the latter clearly benefits from the presence of the Abbey to the south whilst Barton Street suffers from the lack of a discrete destination/anchor (as reflected in its relatively low pedestrian count).

Accessibility

Tewkesbury is located in close proximity to junction 9 of the M5, which lies approximately 3 miles to the east of the town centre, and is strategically located for the South Wales, the Midlands and South West via the A438, A436 and A46 providing access to the M40, M5 and M50. A number of major routes pass through the town, including the A38 via High Street, Barton Street and Church Street which converge at The Cross. As a consequence, traffic congestion in the centre is an issue, particularly around The Cross at busy periods. The situation can often be compounded where accidents on the M5 divert traffic through the centre given that there is no alternative route other than to pass through the town centre.

Car parking in the town centre is considered good and well distributed throughout the town centre, focused on nine car parks (eight Council operated and one operated by Abbey Lawn Trust). The largest car park is located at Spring Gardens (286 spaces) together with Vineyards (129 spaces), Rails Meadow (127 spaces) and Oldbury Road (96 spaces). In total, the council identify 848 spaces in the town centre and parking for 6 coaches at Gloucester Road. The location of the car parks provide easy access from all main approaches to the town centre although signage is considered an area for improvement. On street parking is also available in the town centre, focused on High Street and Barton Street (typically restricted to one hour). These parking spaces were well used during our survey of the centre. Over 46% of respondents to the household survey consider there to be a poor/very poor adequacy of parking arrangements in the town.

The town is well served by bus routes which provide links with Cheltenham (30 minutes journey time) and Gloucester (35 minutes). Services include Route 41 and 540 linking the town with Cheltenham typically on a 15 minute frequency, and Route 71 with Gloucester, typically an hourly service). Bus services are also available to Bishops Cleeve (circa four per day, 30 minute journey time) and Winchcombe (a more limited service – currently Wednesday and Saturdays). A dedicated bus service links Shurdington/Churchdown (service 525) and Bishops Cleeve/Winchcome (service 526) with Tewkesbury on market days. Over half of respondents to the household survey (zone 7 Tewkesbury) considered accessibility by public transport to be good.

The town centre does not benefit from a central located rail station. The nearest station is located at Ashchurch, 4 miles to the east of the town centre. Opportunities for cyclists exist although there are no dedicated cycle routes within the town centre. It is noted that the traffic free route along the Ashchurch Road (A438) does not extend to the town centre. Cycle stands are provided along High Street.

Pedestrian access in the centre is considered good although a number of issues are noted from previous studies and our observations. These include narrow pavements, which combined with on street parking and traffic flows along High Street can detract from the town centre experience. Lack of signage is also considered an issue, particularly from the car parks and access to the river whilst the opportunity exists to increase the use of the alleyways which provide important linkages throughout the centre. Whilst 55% of respondents (from zone 7) considered a good ease of pedestrian movement in the centre, nearly a third (30%) stated this to be poor.

Customer and residents views

A comprehensive user survey was undertaken of Tewkesbury in June 2009 by Hyder Consulting, based on 'roaming' street surveys on a weekday, weekend and market day. The survey confirmed the following headline findings:

Use of centre

- High levels of use of the town centre, with 86% of respondents (on all survey days) confirming use of the centre at least once a week or more;
- Good levels of daily usage of the centre, with a relatively even proposition of visitors on a weekday (17%), weekend (14%) and market day (13%);
- Over one third (37%) identified their main trip purpose on the survey day related to convenience based shopping.
- By contrast, users did not consider comparison shopping to be a major trip purpose for visiting; only 3% of all respondents identified this purpose;
- Work/business uses of the centre (21%) was an important factor, p[particularly on weekday and market day survey dates;
- The importance of the service offer in the town centre was identified by 14% of respondents as the basis for the main trip purpose;
- The localised nature of the user respondents is confirmed by the importance of non car modes of transport when visiting; Over 38% of users accessed the centre by foot, confirming the local top up role and frequency of daily visits;
- The food/drink offer in the town centre is not considered a major draw of the centre; only 1% of respondents identified this as the main purpose for the visit;
- Approximately 10% of all surveys related to tourist visits, of which the majority group (38%) were day visitors.
- In assessing local shopping patterns, the survey confirms the local retail importance of the town centre, particularly in meeting convenience needs. Over half (53%) of survey respondents were identified to live within the Tewkesbury settlement area.

The same survey identified that approximately three quarters (73%) stated that Tewkesbury represented the main food shopping destination. The town centre is well served by foodstores, including Tesco Metro and Somerfield (now Co-op), together with the out of centre Morrisons. These results support the finding of the household survey undertaken as part of the Vitality, Viability and Vulnerability Study (2008). This confirmed that approximately 69% of respondents used Tewkesbury for their main food and grocery needs. By contrast, the same study noted the dominance of Cheltenham relating to comparison goods, with a higher number of Tewkesbury respondents (66.2%) using Cheltenham for this purpose.

The 2009 User Survey also identified user perceptions of the centre. This confirmed broadly positive thoughts as follows:

- The shopping environment of the town centre was identified as the main positive attribute by (21%) of respondents;
- Other positive attributes include proximity to home (2)%), the range of shops and products (19%) and independent shops (11%); The historic and traditional character of the retail centre was also considered important;
- The need for an improved range of non food shops in the centre was identified by 26% of respondents; Traffic congestion in the centre was identified to be an issue for improvement (21%);
- Other negative perceptions focused on the need for an improved environment (12%), and an improvement in the range of foodstores (11%) and food and drink establishments (11%);

Results from the 2011 Household Survey confirm the importance of Tewkesbury as a retail centre for the local area (alongside the attraction of Cheltenham), and a frequency of use of the centre. Other key findings identified from Zone 7 (Tewkesbury) include the following:

- Over a third (38%) considered the range and choice of non food shops to be poor/very poor.
- By contrast, there was less concern associated with the choice and quality of supermarkets with two thirds considering it to be good/very good.
- High levels of satisfaction with regard to the choice and quality of service facilities (86% good/very good).
- Nearly a third of respondents identified a deficiency of evening entertainment.
- The shopping environment of the town centre was identified as the main positive attribute by (21%) of respondents;
- Other positive attributes include proximity to home (2)%), the range of shops and products (19%) and independent shops (11%); The historic and traditional character of the retail centre was also considered important;
- The need for an improved range of non food shops in the centre was identified by 26% of respondents; Traffic congestion in the centre was identified to be an issue for improvement (21%);

Perception of safety and occurrence of crime
The Vitality, Viability and Vulnerability Study (2008) undertook on street consultation and workshops in Tewkesbury which identified concerns associated with drinking and anti social behaviour, particularly at weekends. Similarly, as part of the household survey which supported the 2008 study, respondents identified the following in respect of their perception of crime:

- Three quarters of Tewkesbury respondents consider the town does not have a high crime rate (74.9%) 17% considered the town did have a crime problem.
- The main reasons for a negative perception of crime focused on anti social behaviour (35.7%), alcohol (22.9%) and drug abuse (20%).
- A lack of facilities for young people were also identified as a problem (by 10% of respondents).

Overall, the perception of respondents is that Tewkesbury is a safe town with a broadly low crime rate. This position is confirmed by the 2011 household survey; 80% (of zone 7 residents) identified the level of personal security and safety to be good/very good. However, as with many small market towns, anti social behaviour at weekends, directly related to alcohol, remains an issue and a potential deterrent for visiting the town centre at weekends. Town centre environmental quality.

Environmental quality of the town centre

Tewkesbury represents an attractive historic centre, characterised by a mix of timber framed Tudor and Georgian buildings interspersed with more modern development which in places does not seem sympathetic to the historical character of the centre. This is particularly apparent at the northern end of High Street which whilst a functional and well used area (focused on Bishops Walk and the car parks), is not considered the most attractive are of the wider town centre. By contrast, the central area of the High Street to the Cross is attractive and provides the concentration of character buildings, including the main retail frontages. The area is of a good visual quality although traffic can impact on the overall quality of the environment. The High Street is an Air Quality Management Area whilst narrow pavements towards the southern end of the High Street have implications for the proximity of pedestrians to passing traffic.

To the south west of the centre, the Church Street area contains a number of character buildings which contribute to a high quality streetscape, and in part benefits from the general absence of on street parking, although traffic flows are busy in the area. This area leads to the Abbey which contribute to the footfall generator and attractiveness of the area. The good level of environmental quality in the town is confirmed by the household survey results; over two thirds (66%) of zone 7 respondents stated it was good.

Overall, Tewkesbury is considered a well kept, safe and maintained centre although it is recognised the quality of the centre would be further enhanced through improved access and opening up of the river (currently largely hidden) to the town centre – this remains a key opportunity of the town centre masterplan initiative. Access is recognised as the major issue although it remains an integral element of the quality and offer of the town. The centre is also deficient in open space although it is recognised the riverside could address this issue whilst an improvement in street furniture and signage is required.

Health check conclusions

Tewkesbury performs an important retail role for its residents and a large rural hinterland. The retail composition and offer is considered broadly comparable to the national average and is concentrated on a defined and compact centre focused on High Street, particularly in the attractive streetscape located between the core central High Street to the Cross. The area of Church Street also contributes to the centre although attention is primarily focused towards the tourist appeal of Tewkesbury Abbey further to the south. The environmental quality of the centre is good and enhanced by the mixed historical character of the centre although the town centre traffic and congestion around the Cross and within the centre can be an issue. It is apparent that the centre has proved resilient against the background of a challenging economic climate, as evidenced by the net gain of 6 convenience units, no net change in convenience uses, and reduction in the number of vacant units, since the 2009 Goad survey of the centre.

As an historic market town, it is unsurprising that the centre is largely characterised by small retail units although this is considered a weakness of the centre in attracting the floorspace requirements of modern retailers. Modern unit provision is currently largely focused to the north of the High Street at Bishops Walk although it is apparent that the town does not contain many multiple representation for its size. In part this contributes to the attractiveness of the centre as a distinctive and unique appeal, although continued investment, confidence, and ability to accommodate multiples are important factors in maintaining vitality and viability, particularly given the proximity to higher order centres. In this context, the town centre benefits from a number of potential development sites, which offer good long term opportunities to extend the primary shopping area.

Whilst the centre is considered broadly healthy in vitality and viability terms, it is considered that the opportunities associated with the riverside and enhanced access to the town centre would further contribute to the role and performance of the centre. The proximity of Cheltenham and Gloucester, particularly for comparison retail, necessitate that Tewkesbury consolidate its role as a market town which meets the immediate needs of local residents but also offer a distinct experience for visitors based on history, historic environment and riverside.

Winchcombe

Centre overview
Winchcombe is an historic market town, located in the east of Tewkesbury Borough within the Cotswolds, lying midway between Broadway and Cheltenham. The town represents both an important local centre, and is located to the north east of Cheltenham (9.6 miles/15 km) and approximately 14 miles (22 km) east of Tewkesbury. In 2001, the population of Winchcombe was 6,145.

The centre is characterised by a historic and attractive central core which supports a range of small independent retailers. The role of tourism, associated with walking and a base to explore the Cotswolds the Cotswolds, alongside attractions such as Sudeley Castle and Hailes Abbey is important, and is reflected in the range of service and tourist related uses. In retail policy terms, the centre is identified as one of the Borough's Retail Areas, with the retail centre focused on a T-shape configuration along High Street together the with southern extent of North Street and the southern area of Hailes Street.

Diversity of town centre uses
Despite the relatively small size of the centre, Winchcombe benefits from a Goad centre report (2008). This has been adopted for the purposes of the retail composition assessment and has been updated to take account of changes at the time of DPDS survey in June 2011.

In summary, the Goad identified 61 units in the centre although the DPDS 2011 survey identified 60 units, based on the following retail composition with regard to outlet numbers (Table 1). In the absence of up to date floorspace data, the 2008 Goad floorspace data has been adopted (Table 2).

Table 1: Retail Composition by Outlets

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	8	13.33	9.23
Comparison	24	40	41.89
Services	24	40	34.78
Miscellaneous	-	-	1.18
Vacant	4	6.66	12.92
TOTAL	60	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Source: DPDS (2011) and Goad (2008)

Table 2: Floorspace by Retail Composition

Sector	Total Floorspace Sq. m	% of Retail Composition	UK Average %
Convenience	864	16.43	17.35
Comparison	1,765	33.57	47.35
Services	2,072	39.40	23.05
Miscellaneous	223	4.24	0.99
Vacant	334	6.36	11.26
TOTAL	5,258	100	100

Miscellaneous includes employment and careers centres, post offices and information centres
Source: Goad (2008)

In retail composition terms, the local role of the centre is confirmed by a high level of convenience representation (13.33%) which is over 4% higher than the national average although it is noted that 2 convenience units have been lost in the centre since the 2008 Goad survey. In floorspace terms, Goad estimated the centre supported 864 sq. m of convenience uses although this figure is anticipated to have reduced following the closure of the deli and grocers on North Street.

Of the 8 convenience units, Winchcombe has representation from each of the six convenience sub-categories, and is over represented with regard to five of these categories (bakers, butchers, greengrocers & fishmongers, groceries & frozen foods, and off liceneses), when compared to the national average. The town has an above national average proportion of overall convenience floorspace devoted to bakers and butchers which confirms the convenience focus of the centre and the role of independent, specialist convenience retailers. The main convenience store is focused on Co-op on North Street although the town continues to support a diversity and range of other convenience retailers (despite the aforementioned loss of the deli and grocers since the 2008 survey).

The proportion of comparison units (40%) is broadly comparable to the national average, and accounts for 24 of the 60 units in the centre. Since the 2008 Goad survey, the centre has strengthened its comparison offer with a net gain of 4 units, largely focused on tourist related uses (pottery, gallery and antiques). This will have increased the total comparison floorspace in the centre which was identified by Goad to be significantly lower than the national average.

Of the 24 identified comparison units in 2011, six of the sixteen sub-categories are not represented in the town. These relate to the footwear & repairs; mens & boys wear; electricals; cars/motor cycles accessories; variety, department and catalogue; and jewellers, clocks & repairs categories. The centre does however support an above average number of comparison sub categories, particularly furniture, carpets & textiles, and DIY/hardware uses. Overall, the comparison offer is considered reasonable for a town of its size and supports a high number of specialised uses, which represent higher end uses (e.g. antiques, furniture, and high end ladies fashion), which confirm the underlying influence of an affluent catchment and attraction to tourists.

The number of services (40%) is high when compared to the national average (34.7%) which reflects its role as a local service and tourist centre. In total, the centre has 24 services unit out of a total of 60 units, with all services sub categories represented with the exception of travel agents. In particular, the centre has 9 hairdressing, beauty and health units (14.7% which is almost double the national average of 8.2%) and 3 estate agents, which account for 5% of all units (the national average is 3.8%). Whilst representation of restaurants and cafes is good at 8 units (13.1%), this is actually lower than the national average (15.7%) although the range of provision is considered comprehensive, from tea shops to high end restaurants, which ensure a good quality offer and support activity during the evening, albeit primarily focused on tourist visits.

A number of non retail uses exist within the centre, a number of which fall outside the defined retail area, but which contribute to the vitality of the centre. Uses include a social club and vets surgery whilst on the edge of the town centre, a library, primary school and community centre contribute to the wider attraction of the centre. Tourist facilities include the Abbey remains located closest to the centre, off Abbey Terrace, together with Sudeley Castle although the wider town acts as an important base for exploring the Cotswolds.

Edge and out of centre provision
Retail provision in Winchcombe is focused on the centre. There is no edge of centre, or out of centre retail provision of significance.

Retailer representation and retailer demand
The Goad report identifies 8 of the 60 units in Winchcombe centre to be multiple outlets. This represents 13.1% of the total retail composition of the centre and is significantly lower than the national average (30.4%). In terms of major retailers, the centre supports none of the 31 major retailers identified by Goad although two national multiples are identified in the centre (Co-op and Lloyds Pharmacy). Overall, the nature of retailer representation is considered reflective of its localised role and the relative small size of the centre and its focus on independent retailers.

The Focus database does not record any retailer requirements for Winchcombe.

Discussions with local agents active in Winchcombe confirm a relatively healthy centre which is dominated by local requirements and considered a niche, quality retail destination. In view of this, interest in vacant units can be high subject to the suitability of the unit. Given the historic nature of the centre this is considered a constraint by potential occupiers in view of the implications for retailer requirements although this issue is representative of all historic centres. Overall, agents consider a healthy level of demand for the centre albeit often of a specialised nature.

Retail rents and yields
Local agents advise that Prime Zone A rents are in the range £15 - £20/sq. ft. This has remained fairly static over recent years.

Given the lack of recent transactional activity, details of retail yields are not known.

Vacant street level properties
The 2008 Goad report identified a total of 4 vacant units out of 61 units in the centre. This equated to 6.5% of total units and was approximately half the national average (12.9%).

The 2011 update survey identified no change in the overall number of vacant units (4). All of the units identified as vacant in 2008 have been occupied, by specialist tourist oriented uses (pottery, antiques, art gallery) together with a delicatessen (a relocation to the former co-op unit).

The vacant units are located on North Street and a single unit on High Street, although it is noted two of the vacant units have resulted from the relocation of retailers to alternative premises within the centre (delicatessen and women's clothes). This confirms a good level of turnover of vacant shops, with a number of relocations driven by the need for larger shop premises.

Pedestrian flows
Information contained in the pedestrian footfall survey for Winchcombe (2010) confirm an increase in overall footfall when confirmed to the 2009 survey, with a 28% and 44% increase on the weekday and weekend survey periods. The survey further confirmed the increased footfall at weekends, which attracted 64% more visitors than a weekday.

The survey focused on three survey sites in the centre, and confirmed that highest footfall occurred on North Street followed by Western High Street and finally Eastern High Street. All three sites experienced higher footfall when compared to the 2009 survey for the weekday and weekend periods, with increases of 37%, 43% and 30% respectively. Overall, the survey confirmed that footfall is above the 2009 and 2008 levels for all three sites on both survey days, with the exception of Western High Street and confirms that footfall activity in the centre has strengthened in the short term.

The DPDS survey of the centre observed a similar level of pedestrian activity in the centre which primarily reflects the compact nature of the centre, and the linkages to the car parking facilities at Abbey Terrace, Bull Lane and Cowl Lane respectively.

Accessibility
Winchcombe is located 8 miles to the north east of Cheltenham via the B4632, which itself links through to the A44, whilst the B4078 runs to the north links with the A46. Bishops Cleeve is located 5 miles to the west. Winchcombe itself is not located on a main strategic route.

The historic configuration of the centre is reflected in the narrow street network which has implications for traffic passing through the centre. This is problematic where a number of pinch points exist, particularly for HGV traffic, and has implications for pedestrians within the central area. In addition, the problem of front servicing of the retail units often adds to traffic congestion in the centre whilst restricted parking is present in the centre whilst many local residents do not benefit from off street parking.

Car parking in the centre is limited despite the importance of the car in accessing Winchcombe. This again reflects the historic configuration of the centre with restricted parking controls in place throughout the centre.

There are two Council operated car parks; the largest at Back Lane (98 spaces and 2 coaches – access to the centre via Cowl Lane) and Bull Lane (45 spaces, the closest facility to the centre with access via Bull Lane) which provide a mix of short and long stay parking. In addition, on street parking is provided on the edge of the defined retail area at Abbey Terrace (35 spaces, restricted to 2 hours). Overall, the centre is considered to have limited parking provision, particularly for free parking, which is considered important for attracting passing trade. An improvement in signage for parking is considered important.

Public transport is limited and compounded by its rural location. Bus services are relatively infrequent although services to/from Cheltenham are considered good during weekdays/saturdays (circa 15 minute journey time, 9 services daily) via service 606 (Cheltenham – Broadway - Willersey) with 9 stops listed in Winchcombe, including North Street and Abbey Terrace. Infrequent services are also available to Bishops Cleeve (15 minutes travel time) and Tewkesbury (50 minutes travel time) via route 526 with a bus stop at Abbey Terrace, and are restricted to Wednesdays and Saturdays. No rail services exist in Winchcombe.

Pedestrian access in Winchcombe is considered acceptable although the historic pattern of development is reflected in the narrow streets and pavements in the centre. This can create pinch points for traffic along the High Street.

Customer and residents views
Information contained in the Tewkesbury, Winchcombe and Bishop’s Cleeve User Survey (June 2009) provides an understanding of customers use and views of the centre, based on ‘roaming’ street surveys on a weekday and weekend. Key headline findings are outlined below:

Use of centre

- Good levels of support for the centre with 58% of respondents (on all survey days) confirming use of the centre on a daily basis;
- 17% of respondents confirmed they visit the centre less than once a month, confirming the attraction of the centre for tourist visits and its specialist retail offer;
- During the weekday, over one third (37%) identified their main trip purpose on the survey day related to convenience based shopping, and xx % for work/business purposes.
- By contrast, for weekend users, convenience shopping and food/drink purposes were the main trip purpose;
- The survey confirmed the importance of visitors to the centre; 38% of respondents did not live in Winchcombe;
- Over 66% of respondents undertook their main food shopping outside Winchcombe, reflecting the absence of a major food store and likely linked trips for food shopping with work purposes, focused on Cheltenham and Bishops Cleeve;
- The top up convenience role of Winchcombe is important; 73% of respondents identified this role;
- Many respondents to the survey were retired or approaching retirement which confirms the demographic profile.

The 2009 User Survey also considered user perceptions of the centre which confirmed the following:

- The shopping and centre environment was identified as the main positive attribute by (24%) of respondents;
- The range of shops/products and independent nature of retailers were considered other positive attributes accounting for 17% respectively of respondents, together with good customer service (8%);
- Almost half of respondents (44%) identified congestion as a major problem and considered the issue needed to be addressed as the key improvement for the centre, particularly associated with the narrow roads and the High Street/North Street priority junction;
- Alongside congestion, improved accessibility was identified by nearly a third of respondents (30%).

Perception of safety and occurrence of crime

The Vitality, Viability and Vulnerability Study (2008) confirmed that the overriding majority of local residents consider the centre to be safe (88.3%). Only 1.9% of survey respondents considered Winchcombe to have a high level of crime. The 2011 Household Survey confirmed a general satisfaction with safety and security in the centre.

Environmental quality of the centre

Winchcombe is characterised as an attractive historic town, typical of that found through the Cotswolds. The central area is compact and focused around a tightly defined retail areas set around the High Street/Hailes Street and North Street junction. The variety of building styles in the centre is mixed and of a high visual quality, providing the occasional Tudor and Elizabethan period buildings interspersed with Georgian designs, which combine to create an attractive and quality townscape.

The overall quality of the environment is considered good, clean and well maintained although the limited parking opportunities and narrow road network can create pinch points and can impact on pedestrian experience of the centre. The quality of the environment was rated as good by those respondents to the 2011 Household survey.

Health check conclusions

Winchcombe is considered a healthy retail centre which is characterised by niche and specialised offer, set within a compact and attractive environment.

It is a relatively isolated centre and not located on the strategic road network, with tourism considered an important influence given its location within the Cotswolds and its high quality offer, which including restaurants and antiques and fashion shops. Winchcombe represents an important local centre which provides for a mix local population focused on the retired and also commuters. As a consequence, it is considered a relatively affluent centre, which combined with the tourist attraction of the centre, ensure that the services and convenience offer is comprehensive.

The environmental quality of the centre is distinctive and based on an historic townscape although this has implications for future development whilst unit configuration, front servicing and narrow roads impact represent constraints for modern operational requirements. The limited provision of parking (and poor signage) is a major issue although improved scope exists to address signage and parking management.

Given the role and function of the centre, the limited yet niche offer is considered a distinct, independent and attractive feature, particularly where many centres are considered clone towns. For many visitors and local residents this is positive attribute with rival centres providing a main convenience and comparison function.

There is no obvious opportunity or need for expansion of the centre given the compact and historic configuration of the existing layout.

Bishops Cleeve

Centre overview

Bishops Cleeve is a small centre, located to the north of Cheltenham and to the west of Winchcombe, and represents the second largest settlement in the Borough, with a population of 13,411 (as at 2001). In many ways, its growth can be attributed to its proximity to Cheltenham, located 3 miles to the south.

The retail centre, identified as a Retail Area by Local Plan Policy RE3, is comprised of three distinct and compact blocks focused around Church Road. The largest designated area is located to the south of Church Road, anchored by a Tesco Extra store and modern, purpose built units fronting Church Road, whilst another distinct retail area is located to the north of Church Road. A smaller self contained retail area exists at the junction of Church Road and School Lane. In contrast to Winchcombe and Tewkesbury, the retail areas AT Bishops Cleeve are characterised by more modern development, considered to have been developed over the last 30 years.

In addition, a small parade of shops exists at The Green, located to the south of the aforementioned retail areas, off Bishops Drive and Tobyfield Road.

Given the size of the centre, no Goad retail information exists for Bishops Cleeve.

Diversity of centre uses

In the absence of Goad data, the assessment of existing uses has had regard to the baseline information contained in the Council's Vitality, Viability and Vulnerability Study (2008), which included an appraisal of Bishops Cleeve. This has been updated by the DPDS site survey undertaken in 2011 and has adopted the Goad categories for summary purposes.

Table 1: Retail Composition by Outlets - Church Road

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	6	11.76	9.23
Comparison	12	23.52	41.89
Services	26	51	34.78
Miscellaneous/Other	4	7.84	1.18
Vacant	3	5.88	12.92
TOTAL	51	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

Table 1 provides a summary of the main concentration of the three Retail Areas focused on Church Road and identifies a total of 51 units. This excludes a number of units which were identified as part of the 2008 Hyder Study but which fall outside the defined Local Plan Retail Areas boundary. In retail composition terms, this survey identified 6 convenience units equating to 11.76% of total retail composition in the centre. This is higher than the national average and in floorspace terms is dominated by the Tesco superstore – including café and comparison goods sales, and a large car park, located to the south of Church Road. It does not include the Lidl store at Evesham Road which is located outside the defined Retail Area.

A total of 13 comparison units were identified, accounting for 25% of total provision. This is significantly lower than the national average (41.8%). Interestingly, the services offer of the centre is significant, and accounts for 26 units which represent

51% of the retail composition of the centre. This is higher than the national average of 34.7%.

A small parade of retail units exists to the south of the main retail areas at The Green This comprises seven units as summarised in Table 2.

Table 2: Retail Composition by Outlets - The Green

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	2	28.57	9.23
Comparison	1	14.28	41.89
Services	2	28.57	34.78
Miscellaneous/Other	1	14.28	1.18
Vacant	0	0	12.92
TOTAL	7	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

Within the Green, retail provision is focused on a Co-op foodstore but also includes a butchers whilst service provision include Lloyds bank and a hairdressers. Other occupiers include a DVD rental shop and the offices (housing association).

The centre of Bishops Cleeve also supports a variety of important community uses which consolidate the diversity and appeal of the centre. These include a library, Parish Council buildings together with a doctors surgery/clinic and dentist which contribute to footfall and use of the centre.

Edge and out of centre provision

Retail provision in Bishops Cleeve is primarily focused on the Retail Areas of the centre. A Lidl store exists in an edge of centre location, off Evesham Road, to the north west of Church Road. There is no other edge of centre, or out of centre of retail provision.

Retailer representation and retailer demand

The overall composition of the centre is characterised by independent retailers, including a good range of convenience operators and a number of specialist operators (e.g. delicatessen, butchers, bakers, greengrocers). The 2011 survey identified three national multiples in the defined Retail Areas (Tesco, Co-op and Original Factory Shop) although if Lidl is included this totals four. The overall majority of occupiers are independent retailers which add to the retail offer and attraction of the centre.

No information is collected by Focus to assess retailer requirements for Bishops Cleeve.

Discussions with local agents active in Bishops Cleeve confirm the dominance of the Tesco store on the centre although it is apparent from occupancy levels, and the number and offer of independent and specialist convenience retailers successfully operate in the centre. The overall opinion is that the centre performs an important local role and function, particularly in servicing the needs of a growing local population. The proximity to Cheltenham – a major regional centre, has implications for retailer demand, particularly from comparison retailers whilst the nature of small retail units and overall low levels of vacancy largely limit retail demand to small, independent retailers.

It is noted that the local business survey undertaken by Hyder (2008) identified a strong interest in future growth by respondents, with approximately a quarter of respondents looking to increase the sixe of premises within 5 years. The impact of the economic slow down however is anticipated to have impacted on these aspirations although the underlying tone is of confidence of commitment and investment in Bishops Cleeve.

Retail rents and yields
Given the lack of recent transactional activity, details of rents and yields are not known. Discussions with local agents confirm that many occupiers have operated in the centre for many years which in part confirms a stable business community.

Vacant street level properties
The DPDS survey (2011) identified a total of three vacant units in the three main retail areas. This equated to 5.88% of total units which is significantly lower than the Goad national average of over 12%. For comparison purposes, the 2008 Hyder study identified two vacant units in the centre which confirms that little changes have occurred in overall vacancy rates in the centre, despite recent economic conditions. Overall, the centre has a below average proportion of vacant properties at street level.

Pedestrian flows
The 2010 Pedestrian Footfall Report assessed four sites in Bishops Cleeve and allows a comparison with information from 2008 and 2009. In all cases, the four survey sites confirmed an increase in overall footfall compared to earlier survey years for both the weekend and weekday sample days; the increase equated to 39% and 19% respectively.

In contrast to the survey trends for Tewkesbury and Winchcombe, a higher proportion of footfall was recorded for the weekday period compared to the weekend. Within the centre, the highest overall footfall was recorded at Eastern Church Road (the same as recorded in the 2009 survey), flowed by Western Church Road, Tesco-Church Road link, and the Tralings Yard – Church Road pedestrian link. For all locations, there was a marked overall increase in footfall compared to the 2009 for the above locations, including a 66% increase at Tarlings Yard-Church Road.

The DPDS survey of the centre observed the majority of pedestrian activity along Church Road and the area of Tesco. The superstore is considered to have an important impact on activity in the centre, reflecting the later opening hours of the store (to 10pm, Monday to Saturday).

Accessibility
Bishops Cleeve is located 4 miles to the north of Cheltenham via the A435, with Tewkesbury located 7.5 miles to the north east (via the A435 and A46). The centre is well located with regard to the local highway network.

Car parking in Bishops Cleeve is considered good with provision primarily focused on the Tesco car park off Church Road. This provides parking for up to three hours (no charge). A limited provision of on street parking exists in the centre (circa 12 parking bays, providing for 45 minutes with no return in 2 hours) although parking is restricted along the majority of Church Road.

Public transport is focused on bus services and does not benefit from any rail provision (this is available at Ashchurch and Cheltenham). Good bus services exist to Cheltenham (approximately 25 minutes journey time) via Service D (Up Hatherley-

Cheltenham-Bishops Cleeve) which operates a very frequent weekday service (at a peak of approximately every 10 minutes from 8am to 6pm). A frequent service also exists on Saturdays with a less frequent Sunday service (approximately every 30 minutes). For these services, a bus stop exists in the centre at Church Road, Mill Parade. Service 43 runs between Bishops Cleeve and Tewkesbury (circa 30 minutes journey time) on weekdays and Saturdays although frequency is limited, and restricted to approximately 4 services between 10am – 2pm. In addition, the Tewkesbury Borough Bus links Bishops Cleeve with Tewksbury (and Winchcombe) on market days (service 527).

Pedestrian access in the centre is focused on Church Road although traffic flows along the road are not considered problematic for pedestrians given that traffic volumes are relatively low. This reflects the influence of the A435 link road which diverts significant levels of traffic from the centre.

The 2011 household survey identified accessibility to the centre by public transport to be good /very good by over half of respondents who identified Bishops Cleeve as their nearest centre. The same respondents identified higher satisfaction with regard to accessibility by car, the adequacy of parking arrangements, and the ease of pedestrian movement around the centre.

Customer and residents views

The Tewkesbury, Winchcombe and Bishop's Cleeve User Survey (June 2009) provides an indication of customers views of the centre, including the use of the centre and is based on 'roaming' street surveys undertaken on a weekday and weekend. A summary of the headline findings relevant to Bishops Cleeve are outlined below:

Use of centre

- Approximately half of all respondents (47%) visit the retail centre on a daily basis, with 90% confirming a visit to the centre more than once a week, which reflects a role and function as a local retail centre;
- 72% of respondents reside within Bishops Cleeve, confirming its localised catchment, whilst its proximity to Cheltenham is reflected by 16% of respondents;
- Bishops Cleeve provides an important top up convenience and service role, whilst the Tesco store is considered a major draw to the centre;
- Access to the centre by car is important with the majority of respondents visiting the retail centre by this mode of transport. This contrasts with the high level of pedestrian access recorded at Tewkesbury and Winchcombe. The impact of the Tesco store and its role in meeting main food shopping needs is considered an important influence in this respect;
- Bishops Cleeve provides a main food shopping destination, as confirmed by 82% of respondents. The impact of the Tesco store is considered important. Its also play an important top up food destination (amongst 88% of respondents).

The 2009 User Survey assessed user perceptions of the centre which confirmed the following:

- Proximity to home (21%) and the range of shops/products (19%) were identified as the main positive attributes by 21% and 19% of respondents respectively;

- The shopping environment of the centre was also considered a positive attribute by 13%, together with its services (9%), accessibility (9%) and proximity to work (10%);
- In addressing negative issues and suggested improvements, the overriding issue for over a quarter of respondents focused on improved accessibility to the centre (28%), whilst the related issues of congestion and noise/pollution accounted for 17% of respondents respectively.
- The need for an improved product range, and also improved range of non food stores were also identified by 11% of respondents in both cases

The 2011 Household Survey confirms a general satisfaction with the facilities available in the centre and its performance as a retail centre, with almost a third of respondents (who identified Bishops Cleeve as their nearest centre from within the Cheltenham zones), visiting at least once a week for convenience purposes. By contrast, the more limited comparison offer (and proximity to Cheltenham) account for a third visiting one a month or less for comparison purposes.

Perception of safety and occurrence of crime
The Vitality, Viability and Vulnerability Study (2008) for Bishops Cleeve undertook a householder survey to assess local resident's perceptions of crime. Over three quarters of respondents (78.2%) considered there was not a high perception of crime. By contrast, 13.4% of respondents perceived a high crime rate in Bishops Cleeve. The overriding reason for this perception focused on antic social/rowdy behaviour together with alcohol misuse. In addition, one fifth of respondents identified burglaries as the main issue.

The 2011 Household Survey confirmed high levels of personal security and safety in the centre, with approximately 80% of respondents identifying this to be good/very good.

Environmental quality of the centre
The built environment of the centre is influenced by the relatively modern buildings which confirm a functional centre but one which cannot be considered in the same quality as neighbouring centres (e.g. Winchcombe, Cheltenham).There is an absence of distinctiveness in this context whilst the nature of modern development is characteristic of many retail centres across the country. Notwithstanding this, a number of retailers have sought to improve the attractiveness of the retail frontages.

The centre does benefit from an area of open space, located to the southern side of Church Street, which provides for seating and information boards whilst a sufficient level of street furniture ensures that the centre provides for the shopper needs. In addition, it is considered that linkages between the Tesco and Church Street could be enhanced to encourage greater footfall within the wider centre.

The overall impression is of a well kept, safe and maintained centre, but as a modern centre lacks the attraction and variety of older centres. In many ways, the centre is a commuter settlement which serves local needs through a functional and modern centre. Responses to the 2011 Household survey confirms a good level of satisfaction with the quality of the environment in Bishops Cleeve.

Health check conclusions
Bishops Cleeve provides an important retail centre for the local residents, including those on the eastern side of Cheltenham. The centre provides a large, convenience and service led function, which is principally focused on a large Tesco and supporting car park which acts as the main parking facility in the centre. Despite the presence of

this foodstore, which acts as an important main food destination, the centre supports a good diversity of convenience uses, including a number of specialised, independent retailers which act as attractors to the centre. Similarly, levels of comparison provision are considered healthy although the proximity to Cheltenham as a major regional centre has obvious implications for the extent of the comparison offer. Service provision is also considered good to support a large population and surrounding hinterland. Low levels of vacancy – confirmed by historic trends, further confirm a healthy centre in vitality and viability terms.

Although the environmental quality is characterised as a modern centre, the centre is functional and performs its role. Our observations of the centre combined with previous survey evidence confirm a well used centre, primarily for convenience purposes although the general limited provision of restaurants is considered a weakness. However, proximity to alternative facilities in Cheltenham must be recognised in this context.

Two areas (north of Bishops Cleeve and North West Cheltenham) have historically been identified as potential growth locations although work remains ongoing to identify preferred options for future development. Should future population growth associated with development come forward in these locations, it is anticipated the ability of the existing centre to accommodate expansion is relatively limited although the centre could be expected to help meet future needs in the short term.

Brockworth

Centre overview

The defined Retail Areas serving Brockworth are comprised of three separate areas within the settlement at Court Road, Abbotswood Road and Boverton Drive. The largest retail area is concentrated along Court Road in the centre of Brockworth, to the north of Ermin Street. A small parade of shops, anchored by a large Co-op exists at Abbotswood Road to the south of Ermin Street, whilst the smallest retail area is located at the corner of Boverton Drive, to the north west of Court Road.

Brockworth is located to the east of Gloucester, and to the south east of junction 11A of the M5. The Brockworth bypass (A417) runs to the north of the settlement with the A46 abutting the settlement to the south east. The large employment site at Gloucester Business Park adjoins the western boundary of Brockworth.

Diversity of centre uses

We have identified three separate areas for Brockworth (see Table 1). All information is based on the 2011 DPDS survey of the centre.

Table 1: Retail Composition by Outlets, Court Road

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	3	25	9.23
Comparison	3	25	41.89
Services	6	50	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	12	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

The centre is a purpose built, modern parade of shop units, anchored by a large Co-op store at the northern end of Court Road. The DPDS survey (June 2011) identified a total of 12 units in the defined Retail Area. The centre has a good level of convenience provision (Co-op, bakery and McColls), which account for 25% of total provision. The centre also benefits from a number of comparison uses (3 in total), including a pharmacy, and carpets/flooring shop. In terms of services, 50% of provision (6 units) are present in the centre, based on a good mix comprising a hair salon, beauty salon, restaurant, takeaway, laundry/dry cleaners and bank.

A number of important community facilities exist outside of the defined Retail Area including a community centre, youth centre and library.

Table 2: Retail Composition by Outlets, Abbotswood Road

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	1	20	9.23
Comparison	1	20	41.89
Services	1	20	34.78
Miscellaneous/Other	0	0	1.18
Vacant	2	40	12.92
TOTAL	5	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

Table 2 confirms that the retail area off Abbotswood Road supports 5 units, and is anchored by a Co-op store with a parade of retail uses to the rear of the Co-op. Comparison uses are limited to a pharmacy whilst service uses are limited to a hair salon. A number of vacant units exist in the centre.

Table 3: Retail Composition by Outlets, Boverton Drive

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	0	0	9.23
Comparison	0	0	41.89
Services	2	100	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	2	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

The third and smallest retail area is located at Boverton Drive. Table 3 confirms that the level of facilities is limited (2 in total) and is entirely focused on services (hair salon and estate agent). The absence of any convenience (or comparison) uses is considered an issue.

Edge and out of centre provision
A large Tesco store exists at Gloucester Business Park off Delta Way, which links with Ermin Way/Hucclecote Road. Planning consent for the store was granted in April 2006 which restricts the net sales floorspace to 3,990 sq. m. This represents the main convenience facility in Brockworth.

An extension to the foodstore has recently been built (1,028 sq. m net) whilst new retail units have been constructed at Whittle Square, adjacent to the Tesco store which form part of the same planning permission for mixed use development. A total of 1,868 sq. m is proposed in the retail units which provide for A1 – A5 uses, with Phase 1 of the scheme built out. Active marketing of the units is underway with a number of operators trading including Badhams Pharmacy and a hairdessers.

Retailer representation and retailer demand
The overall composition of the three retail areas differ, with the majority of uses focused at Court Road, which is anchored by a Co-op foodstore. In total, the centre supports four national multiples (Co-op, McColls, Lloyds Pharmacy, and Sue Ryder Charity Shop). This centre is considered to posses a good mix and range of uses, and for a centre of its size, supports a good level of national retailer representation.

Similar comments apply with regard to Abbotswood Road although the number of units is lower. The centre has two national multiples (Co-op and Lloyds Pharmacy).

The facilities at Boverton Drive are limited to independent, service uses.

Retail rents and yields
No information on retail yields or rental data is available for the small retail areas which comprise the defined centre.

Vacant street level properties
No vacant units were identified at Court Road although two vacant units exist at Abbotswood Road.

Pedestrian flows

No baseline information is available with relation to pedestrian flows for the centre. Our observations of the centres at Court Road and Abbotswood Road confirmed limited levels of pedestrian footfall from the surrounding residential area, although this likely reflected the time of the survey.

Accessibility

The three retail areas are all accessible to local residents, with good proximity from the local road network (the ease of pedestrian movement in the centre is confirmed by the positive responses to the household survey). Access to Abbotswood Road is good with direct links to Ermin Street although parking is considered poor. The site is subject to front facing service yard and inward facing retail units.

Similarly, the limited facilities at Boverton Road are accessible (although parking is considered problematic given its corner location).

Accessibility by public transport and car to the centre was identified as generally good from respondents to the 2011 Household Survey although there was less satisfaction with regard to the adequacy of car parking. Nearly a third identified this to be poor which concurs with our observations that parking is considered poor at Court Road. An overriding concern relates to the lack of signage and convoluted access to the site.

The settlement does not benefit from a rail station although Brockworth, given its proximity to Gloucester and Cheltenham, is served by a number of bus services although stops in the centre are limited. Service 10 (Cheltenham-Brockworth-Gloucester) has a stop at Ermin Street/Moorfield Road and offers a regular service frequency. In regard to service 46, this has as one stop at Shurdington Road (Cheltenham – Stroud-Forest Green service). Although services 3 and 4 relate to a circular route linking Gloucester, Abbeydale and Brockworth, no stops are in Brockworth and are focused on Abbeydale and the Glevum Centre with Gloucester.

Customer and residents views

The 2011 Household Survey confirmed the top up role of the facilities available at Brockworth. Of those respondents which identified Brockworth as their nearest centre, approximately 40% used the centre for food purposes more than once a week. By contrast 70% never used the centre for non food purposes. A high level of satisfaction was noted in regard to the range and quality of supermarkets (although this may be focused on the Tesco superstore as opposed to the defined retail areas), together with the choice and quality of service facilities.

Perception of safety and occurrence of crime

Respondents to the household survey were broadly satisfied with the safety and security of the centre; 53% considered it to be good although 23% considered it to be poor/very poor.

Environmental quality of the centre

The environmental quality of the defined retail areas varies by location. The environment at Court Road is considered well kept, and reflects the small, modern units available in the centre. Parking is available to the front of the units although it is recognised that overall parking provision (and access) is poor.

At Abbotswood Road, the retail units are well kept although the external environment is considered uninviting. This reflects the siting of the service yard and the inward facing nature of the retail parade units adjoining the large Co-op store.

The retail area at Boverton Drive is considered of poorer quality and a lower environmental quality although the actual retail role does not currently exist.

Respondents to the household survey were mixed in their views on the environmental quality of the centre; 46% considered it to be good and 30% considered it to be poor.

Health check conclusions
Of the three defined Retail Areas, it is apparent that the main concentration and diversity of offer is focused at Court Road. This is considered a well performing centre for a centre of its size. This is reflected in the diversity of uses, including a high level of convenience offer (4 units, anchored by Co-op), the high level of national multiple representation (4 out of 12 units) and the overall modern, quality environment. However there are a number of issues, principally related to poor parking provision and the need for enhanced signage to the centre given its ‘hidden’ location.

Similarly, whilst the level of provision at Abbotswood Road is lower than Court Road, the retail area functions as an important local centre, particularly driven by the role of the Co-op store. However, the centre has a number of vacant units, which in our opinion is compounded by the configuration of the inward facing shops and their location alongside the service yard. Parking is also considered poor whilst the overall external environment of the centre offers scope for improvement.

The retail area at Boverton Drive cannot be considered in the same context as the other centres, in view of its small size and dominance of service uses. In summary, the retail area no longer contributes or performs a retail function. This is further impacted by its separation from the main concentration (and focus) for retail uses to the south east, at Court Road.

A good opportunity exists to redefine the boundaries of the Retail Area for Brockworth, including the extension of the boundary at Court Road to include the high level of community facilities which abut the existing retail facilities.

It is recognised that the Tesco foodstore and the new retail accommodation at Whittle Square represents a major threat to the defined retail areas at Brockworth. It will be important to monitor the performance of the retail areas to assess the impact of the large concentration of out of centre provision at Gloucester Business Park.

Churchdown

Centre overview
The defined Retail Areas at Churchdown are comprised of three distinct areas although in reality the main retail area is St Johns Avenue, which effectively serves the northern area of Churchdown. Two small retail areas are located at Blacksmith Lane and Church Road which serve the southern area of Churchdown, to the south of the A40.

Churchdown is located midway between Gloucester and Cheltenham, with Gloucester to the west and Cheltenham to the east. The settlement is split by the A40, with the southern area bounded between the M5 and A40. Junctions and 11A of the M5 are in close proximity to the centre, and linked by the A40 respectively. Staverton airport is located to the north east of Churchdown.

Diversity of centre uses
The retail composition of the Churchdown Retail Areas is summarised in Tables 1 and 2 below and is based on information based on the DPDS survey of the centre undertaken in June/July 2011. For consistency, the retail composition is based on the Goad categories.

Table 1: Retail Composition by Outlets - St Johns Avenue

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	3	30	9.23
Comparison	1	10	41.89
Services	6	60	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	10	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

The retail centre is comprised of 1960/70's purpose built shop units (with flats above) anchored by a Co-op foodstore which has been formed through the amalgamation of a number of units. The DPDS survey (July 2011) identified a total of 10 units in the defined Retail Area. There is uncertainty whether many of the flats are occupied and are likely to be in storage use.

In retail composition terms, the centre offers a good level of convenience provision (3 units) which account for 30% of all units (bakery, Co-op and CTN). This confirms the top up convenience role of the centre although the centre also offers a good range of services provision totalling 6 units (60% of the centre). Uses include a hairdressers, estate agent, betting office, bank, optometrist and undertakers. A Post Office facility also exists in the CTN unit. By contrast, comparison uses are more limited to a single unit (Pharmacy).

The retail units are considered of a good configuration and size, with servicing to the rear. A common theme is the larger units created by the amalgamation of units to form larger shop units, including the Co-op foodstore and the undertakers.

Table 2: Retail Composition by Outlets - Church Road/Blacksmith Lane

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	3	37.5	9.23
Comparison	0	20	41.89
Services	5	62.5	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	8	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

The retail area serving the southern part of Churchdown is comprised of two small parades. In total, the two areas support 8 units, focused on local convenience provision and services. Convenience provision is considered good (3 units) focused on a butcher, greengrocers and convenience store whilst there are 5 services units which provide a typical local centre offer (café, takeaway, estate agent and two hair salons). There are no comparison uses in this retail area.

Edge and out of centre provision
There is no edge and out of centre provision relevant to St John's Avenue.

Within the Church Road/Blacksmith Lane retail area, two units adjoin the established retail area but are not specifically defined within the designation whilst a large public house also falls outside the defined area. For the purposes of the survey, they have been included within the retail composition of the centre. A Co-op store exists at Parton Road, to the north east of the centre.

Planning consent has been granted in May 2011 for a Tesco foodstore (2,231 sq. m gross/1,071 sq. m net) at the former Hurrans garden centre site at Cheltenham Road East.

Retailer representation and retailer demand
The overall composition of the retail areas differ, with the highest number of uses at St Johns Avenue. National multiple representation is focused on two occupiers (Co-op and Martins) together with a regional multiple (Badhams Pharmacy). In terms of services, Coral and HSBC also operate in the centre.

The retail provision in the southern Churchdown Retail Areas is focused on independent retailers (including Premier convenience store which are independently owned).

Retail rents and yields
No information on retail yields or rental data is available for the centres.

Vacant street level properties
No vacant units exist in either of the retail areas at St John's Avenue or Church Road/Blacksmith Lane.

Pedestrian flows
No baseline information is available with relation to pedestrian flows for the centre. Our observations of the centres at St Johns Avenue and Blacksmith Lane/Church Road confirm limited levels of pedestrian footfall from the surrounding residential area, although this likely reflected the time of the survey.

Accessibility

The two retail areas serve the northern and southern areas of Churchdown respectively. The largest centre is accessible from Pirton Lane, via Morley Avenue, and is easily accessible to a large, surrounding residential area in the north of Churchdown. The smaller retail areas serving south Churchdown are equally accessible for local residents. In both cases, there are good links with the surrounding residential area.

A good level of on street parking exists in St John's Avenue together with further parking to the rear of the centre. A lower level of car parking capacity exists at Church Road/Blacksmith Lane.

The settlement is not served by a rail station although bus services exist. Two regular services between Gloucester and Cheltenham (service 97 and 98), with both services stopping opposite the Bat and Ball Public House, whilst service 97 also stops at Parton Road (opposite the library), and service 98 at Pirton Lane (opposite Winston Road). This runs Monday and Friday (excluding public holidays) and also Saturday, with Sunday services limited to route 98. Journey time to Cheltenham is approximately 30 minutes and Gloucester 20 minutes.

Accessibility by public transport and car to the centre was identified as generally good from respondents to the 2011 Household Survey. However over a third (37%) of respondents considered the adequacy of car parking to be poor.

Customer and residents views

The 2011 Household Survey provides an indication of customers views and use of the centre. The survey confirmed a limited use of the centre for non food purposes; 75% of respondents never used the centre for this purpose, whilst only 18% used the centre more than once a week for food shopping. The quality of non food facilities was generally considered poor although half considered the choice and quality of foodstores to be good.

Perception of safety and occurrence of crime

Respondents to the household survey were broadly satisfied with the safety and security of the centre; 75% considered it to be good/very good.

Environmental quality of the centre

The overall environmental quality of the defined retail areas is considered good, and characterised by well kept and maintained centres. This is confirmed by respondents to the household survey with 75% of respondents considering the quality of the environment to be good.

A number of issues at St John's Avenue include the quality of parking surfaces (potholes) whilst the rear parking area is considered uninviting for customers.

Health check conclusions

The two Retail Areas serve the north and south of Churchdown respectively. The main centre at St Johns Avenue, built as part of a housing estate development, provides a good mix of uses and essential services, which is anchored by a Co-op foodstore together with a number of other convenience facilities including a bakers and CTN. The centre also includes a Post Office, bank and everyday services, and is considered to represent a well performing centre with good quality retailers (including national multiples). The size and flexibility of units is considered important in securing a number of the occupiers.

Similarly, the retail provision at Blacksmith Lane and Church Road is considered good for its size, and based on a convenience led offer with supporting services. Neither centre has any vacant units which provides a helpful indicator of retailer demand in both centres.

Given the geographical proximity to the major centres of Gloucester and Cheltenham it is unsurprising that the facilities at Churchdown provide a local convenience and service led offer. It will be important to monitor the performance of the centre once the Tesco foodstore at Cheltenham Road East has been developed and established trading levels.

The opportunity exists to redefine the retail area boundary at Blacksmith Lane to include a number of uses falling outside the current designated boundary. This could also provide scope to include the public house (Bat and Ball) within the boundary.

Innsworth

Centre overview
The Retail Area at Innsworth is focused on a parade of shops at Blackbird Avenue which serves a large residential area. The settlement of Innsworth is located to the north east of the Gloucester urban area, and is located to the north of the A40 and B4063. The parade provides a local shopping facility for the settlement.

Diversity of centre uses
The centre is a purpose built parade of shop units with flats above, estimated to be built in the 1970’s. The DPDS survey (June 2011) identified a total of 6 units in the defined Retail Area. The retail composition of the centre is set out in Table 1.

Table 1: Retail Composition by Outlets

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	1	16.66	9.23
Comparison	0	0	41.89
Services	5	83.33	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	6	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

The localised offer of the centre is confirmed by the dominance of service uses (5 units) which include a café and takeaway. Convenience provision is limited to a single unit (Premier foodstore) which also includes an ATM whilst there are no comparison uses in the centre.

Edge and out of centre provision
In addition to the defined Retail Area, a Spar convenience store is located on Innsworth Lane to the east of Innsworth centre. This is located in close proximity to the RAF Innsworth base and appears to be a NAFFI facility.

There is no other edge of centre, or out of centre of significance in Innsworth.

The settlement is located in relative proximity to Gloucester which supports a significant level of out of centre retail warehousing and stand alone retail facilities.

Retailer representation and retailer demand
The overall composition of the centre is characterised by local, independent service occupiers. The Premier foodstore is the only ‘national’ multiple although it is recognised that such stores are independently owned. This is reflective of its role as a local neighbourhood shopping facility providing for localised top up and service needs.

Retail rents and yields
No information on retail yields or rental data is available for the centre.

Vacant street level properties
No vacant units were identified in the centre.

Pedestrian flows
No baseline information is available with relation to pedestrian flows for the centre. Our observations of the centre confirm low levels of pedestrian footfall from the surrounding residential area.

Accessibility
The retail area is located in the centre of the residential area, with access from Innsworth Lane via Rookery Road and Swallow Crescent to Blackbird Avenue. Pedestrian access is considered good with parking available to the front.

A bus service runs between Gloucester and Cheltenham (service 97 and 98) although the only Innsworth stop is opposite the Camp. This runs Monday and Friday (excluding public holidays) and also Saturday, ad Sunday (service 98 only). Journey time to Cheltenham is approximately 30 minutes and Gloucester 20 minutes. The frequency of service is approximately 20 throughout the weekdays.

Despite a limited survey sample which identified Innsworth as their nearest centre, respondents to the Household Survey identified general satisfaction with the accessibility of the centre by car and the adequacy of parking arrangements.

Customer and residents views
The 2011 Household Survey confirms the limited role of the centre. Of those respondents who identified Innsworth as their nearest centre, they all indicated that they never used the centre for convenience or comparison shopping purposes.

Perception of safety and occurrence of crime
Mixed views were received to the household survey with regard to the level of safety and security in the centre with an equal good and poor rating.

Environmental quality of the centre
The environmental quality of the retail area is considered good. There is no landscaping whilst parking exists to the front of the retail units. Overall, the centre is considered an attractive and safe shopping environment which reflects its role as a small, neighbourhood retail facility. There was no obvious signs of litter or graffiti.

Respondents to the household survey were mixed in their views on the environmental quality of the centre; a third considered it to be good whilst a third considered it to be poor.

Health check conclusions
The Innsworth Retail Area represents a small neighbourhood facility which is intended to serve the surrounding residential area, and is focused on a services and convenience led offer.

All units are fully occupied and the centre is effectively anchored by the Premier Foodstore. The centre does not benefit from any comparison uses although this is unsurprising given its localised role and function.

Northway

Centre overview
Northway is a small retail centre and represents a local shopping centre which serves a large residential area focused on Northway and Ashchurch.

Located to the east of Tewkesbury and the M5 (junction 9), the local centre is surrounded by established residential areas together with large scale employment uses focused on industrial estates accessed from the A46.

Diversity of centre uses
The centre is a purpose built neighbourhood facility, comprised of 4 units, and is anchored by a Co-op foodstore (includes a small element of household comparison goods provision) together with a chemist, hair salon and betting shop. A post office facility exists in the foodstore whilst the centre also includes an external ATM. The composition of the centre is set out in Table 1.

Table 1: Retail Composition by Outlets

Sector	No. of units	% of Retail Composition	UK Average %
Convenience	1	25	9.23
Comparison	1	25	41.89
Services	2	50	34.78
Miscellaneous/Other	0	0	1.18
Vacant	0	0	12.92
TOTAL	4	100	100

2010 Goad national average composition provided
Source: DPDS (2011) and Goad (2010)

Edge and out of centre provision
There is no edge of centre provision in Northway although the Northway public house immediately abuts the boundary of the retail area.

A Marks and Spencer Simply Food outlet exists at the BP Service Station, located to the south of the settlement, on the A46. This forms part of a roadside services facility, incorporating a BP petrol filling station and Little Chef and is not a dedicated stand alone retail unit.

With the exception of the Morrisons foodstore at Tewkesbury, the local area has no significant levels of out of centre retail provision.

Retailer representation and retailer demand
With the exception of one national multiple (Co-op), all other retail units are small, independent operators. This is reflective of its role as a local shopping facility providing for localised top up shopping needs.

Retail rents and yields
No information on retail yields or rental data is available for the centre.

Vacant street level properties
No vacant properties exists at the centre.

Pedestrian flows
No baseline information is available with relation to pedestrian flows for the centre as exist for Bishops Cleeve, Tewkesbury and Winchcombe. However, our observations of the centre confirm good levels of walk in activity from the surrounding residential area, and particularly from the adjoining car park to the south of the centre, primarily focused on the Co-op store.

Accessibility
The centre is well connected to the local road network with access direct from Northway Lane with a good level of parking available to the side of the foodstore (approximately 30 spaces including disable parking). The wider centre includes a public house with associated parking although this does not form part of the designated Retail Area.

Bus services are focused on services 41 and 42 (Northway-Tewkesbury-Cheltenham) with three stops serving Northway, including one bus stop at Northway, located adjacent to the retail centre. This ensures excellent public transport connectivity with the Northway retail area. Journey time to Tewkesbury (High Street) is approximately 15 minutes, and 45 minutes to Cheltenham (Clarence Street). Bus frequency is approximately every 15 minutes, with a more frequency services between 10 am and 4pm during weekdays and saturdays, and approximately an hourly frequency on Sundays.

The household survey indicates that many respondents who identified Northway as their nearest centre considered it to be good in terms of accessibility by car and public transport, with adequate levels of parking provision.

Customer and residents views
The 2011 Household Survey confirmed limited frequency of use for food and non food purposes; over 65% never used the centre for food, whilst 90% never used the centre for non food purposes (although this is unsurprising given the limited level of provision). Although the survey sample was limited and the majority of respondents did not indicate an opinion, there appears to be satisfaction wit the choice/quality of supermarket (as anchored by the Co-op).

Perception of safety and occurrence of crime
Respondents to the household survey were broadly satisfied with the safety and security of the centre; approximately a third considered it to be good (the majority response was ‘don’t know’).

Environmental quality of the centre
The environmental quality in the centre is considered good and provides an overall attractive and safe shopping environment reflecting its role as a small, neighbourhood shopping centre. The centre is considered well kept with no obvious signs of litter or graffiti. Overall, the impression is of a healthy localised shopping centre. Whilst the near half of all responses to the household survey indicated no opinion, over 30% considered the quality of the environment to be good/very good.

At the time of survey the centre appeared well used, with good occupancy of the car park and activity focused on the food store.

Health check conclusions

The Northway retail area serves a large residential (and employment) area with alternative retail facilities located to the west of Tewkesbury which necessitates journeys to the town centre, potentially via the A46 and crossing of junction 9 of the M5.

The centre appears to operate effectively although serves a local top up function, primarily through the Co-op foodstore (which also acts as the Post Office). Other essential services include the pharmacy facility. Access to the site is good and adequate parking capacity exists whilst the overall environment is clean, well kept and safe.

Signage to the centre is considered poor although given its role in serving local needs, it is envisaged that the major of users are local residents. The opportunity for expansion of the centre is limited given the built up nature of surrounding uses although the it is recognised that local facilities are limited for a large residential (and employment area).

Whilst the centre adequately serves an effective role and function as a local centre, in qualitative terms the area is limited in retail provision terms. Tewkesbury offers a range and choice of facilities although this is limited given its role as a small town centre serving local needs. The wider Ashchurch area represents an important residential and employment area, although this is not currently reflected in relation to retail facilities which can serve the needs of local residents and workers.

It is considered opportunities exist to address this position, particularly given the development prospects that may arise at the MoD site (Ashchurch), which may support further residential led, mixed use development. It is anticipated this issue should be addressed as part of any development scenario (potential site options) through the emerging Core Strategy.