Keynote AP01

Retail Keynote Update 2014

Forest of Dean District Council
December 2014

1 Introduction

1.1 Overview

1.1.1 This report has been prepared by the Forest of Dean District Council in order to provide updated evidence to add to the evidence base for the Adopted Core Strategy and proposals coming forward in the Allocations Plan Document. This document will provide a further update on information found in the 2008 GVA Grimley retail study. Further survey work and retail analysis of the four towns has been carried out which identifies the current position in terms of town centre uses in the district.

1.1.2 This report intends to meet the requirements of the National Planning Policy Framework (NPPF) by updating our figures within the town centre through updated survey work, amending town centre boundaries and finding sites for the provision of town centre retail and leisure developments. This report will assist in the preparation of the Forest of Dean District Council's Allocations Plan.

1.2 Objectives of Update Report

1.2.1 The key objectives for this report identified by FoDDC in response to the emerging Allocations Plan are to:

- Provide a history of the town centre uses including unit uses and retail frontages.
- Undertake updated retail surveys for all towns.
- Review the town centre boundaries, primary and secondary shopping frontages.

2 Plans and Policies

2.1 National

2.1.1 The National Planning Policy framework now replaces the set of Planning Policy Statements including Planning Policy Statement 6: Planning for Town Centres, which was superseded by PPS 4: Planning for Sustainable Economic Growth, which set out the approach to sustainable retail development and economic growth in town centres. Much of the governments view within the framework is a presumption in favour of sustainable development. It's policy on town centres, much of which has been mentioned in the overview above, makes clear their position on trying to create competitive town centres that encourage economic activity and economic development.

2.1.2 The National Planning Policy Framework (NPPF) states that 'Each Local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area (para.158).'. Paragraph 161 describes how this evidence should be used in terms of determining the need for land or floorspace for economic development within town centres which should include retail and leisure development.

2.1.3 The NPPF encourages local authorities to define the extent of their town centres which includes the designation of primary and secondary frontages each with a clear definition and to set distinguishing policies for these areas. It is suggested that local authorities should allocate a range of suitable sites within town centres to meet the need of a range of different types of development. Key development where the need must be met in town centres is retail, leisure, office and other town centre uses. Site availability for these uses must not be compromised by limited site availability and other types of development (para.23).

2.1.4 Town Centres are an area defined on the Local Authority's proposal map which should include primary, secondary frontages and town centre uses. Out of centre developments do not constitute town centres. The NPPF distinguishes the need for primary and secondary frontages. The primary frontage definition relates to an area or street that has mainly retail uses which could include food, drinks, clothing and household goods. Secondary frontages could be defined encorporating a much wider range of uses which could include restaurants, cinemas and businesses. These two areas form what is referred to in the policy document as a primary shopping area.

2.1.5 In defining the boundaries of town centres Local Authorities are expected to take into consideration the location of primary and secondary frontages and also any 'main town centre uses' that are close to the main shopping area but not included within a shopping frontage. The NPPF defines these main town centre uses as retail development, leisure/entertainment facilities, offices, arts, culture and tourism

2. Plans and Policies

development. This encompasses a wide range of uses that could fit part of a town centre. It is considered that if the location is well connected and up to a distance of 300m of a primary shopping frontage then this should be considered edge of centre.

2.1.6 On the 6th of April 2014 the amended permitted development rights with regards to allowing change of uses from A1(Retail) or A2(Professional Services) use class to C3 Residential came into force. The new right allows up to 150m^2 to be converted to residential subject to prior approval of matters by LPA set out in the order, but does not apply in article 1(5) land. As part of these changes permitted rights with regards to conversion of agricultural buildings were also brought in.

2.1.7 The new regulations state that a change of use to C3 (Residential) from A1 (shops) or A2 (financial and professional services) will constitute permitted development provided the conditions are met and prior approval sought. This will not apply if the change proposed relates to a building:

- On article 1(5) land;
- In a site of special scientific interest;
- In a safety hazard area;
- In a military explosives storage area;
- A listed building;or
- A scheduled monument.

2.1.8 There are a number of other conditions to be met for the permitted development rights to apply including prior approval requirements from the LPA which includes usual potential impact on highways, contamination risks, flooding and whether the change would have an impact upon a Key Shopping Area.

2.1.9 The exact definition of a key shopping area is not given in the regulations, the NPPF or the NPPG and therefore it appears that it is for the LPA to define and apply to existing boundaries or features and to include this wording in any new and emerging policies. This offers LPA's a further tool in trying to resist the change of use of retail uses to residential in our small town centres and shopping frontages.

2.1.10 As a result of these changes this evidence document suggests that emerging policies in the Allocations Plan should include a policy on active town centre frontage, which includes the term 'Key Shopping Areas' with a clear definition in the glossary of the document to highlight appropriate identified parts of the town centre for protection against this permitted development right.

2. Plans and Policies

2.2 County

2.2.1 In April of 2013 the Secretary of State for communities and local government made a Revocation order (The Regional Strategy for the South West (Revocation) Order 2013 No.935) which removed the Regional Spatial Strategies and also policies contained within the structure plans for the area. This means that the middle tier of planning policy has been removed. Development is now controlled through the National Planning Policy Framework and under this at a local district authority level, Local Plans/Core Strategy documents and other associated development plan documents. Therefore, there is no policy context for the approach to retail development at a County Level.

2.3 Local

2.3.1 The 2005 Local Plan for the District was adopted in November 2005. This document set out the overall development strategy and more specific policies for the Forest of Dean District area. The Local plan period was from 2005 upto 2011. The planning and compulsory purchase Act of 2004 was published just in the final stages of the Local Plan preparation and meant that the Local Plan was adopted after this new legislation was brought in. This legislation introduced the idea of a new approach to local development plan documents which led to the production of the Core Strategy document. The interim period between 2008 and 2012 saw most of the Local Plan policies saved (Section 10 of Appendices) and still in place whilst the production of the Core Strategy was ongoing. Many of these saved policies have now been superseded by the Core Strategy which was adopted on the 23rd of February 2012.

2.3.2 The Core Strategy was adopted and published in February of 2012 and is the principal planning document that forms part of the Local Development Framework for the Forest of Dean District Council. The document contains the overarching strategic vision and objectives for the district and also sets out a set of core policies for the plan area. Broad figures for development are defined for settlements inline with the settlement hierarchy and these figures are to be met through allocations made in the emerging Allocations Plan.

2.3.3 This strategy contains policies that refer to elements of retail developments and how it should be approached. GVA Grimley were commissioned to undertake a retail study which they produced in October 2008 with a further study update produced in 2011 which identifies the need for convenience and comparison shopping space in the four towns in the district. These figures provide the evidence for allocations and planning applications coming forward in the period that the core strategy covers (Figures can be seen in section 9 of the Appendices).

2.3.4 Policies that cover retail developments or refer to retail development within the core strategy are listed in section 8 of this document and are some of the key policies in which planning applications for retail developments are assessed against.

3. History and Past Studies

3 History and Past Studies

3.1 GVA Grimley Forest of Dean District Retail Study 2008

3.1.1 The GVA Grimley Retail study commissioned by the Forest of Dean District Council in October of 2007 helped to provide background information and evidence for the production of the Local Development Framework. This report provided an up-to-date understanding of retailing in the district and identified opportunities and constraints and the needs of the area. The report identified the need for convenience and comparison goods in the tables below.

3.1.2 The figures for Cinderford however, could be taken to be a lot higher figure of 2,450sq m. This new figure is based on the figures prepared as part of a previous planning application for a Tesco. Due to the Tesco expected goods turnover figure of £29.5m for the proposed facility and based on the basis of trade diversion, they predicted that the market share of convenience sales for Cinderford would increase from 8.6% to 18-19% which could result in a potential derived turnover of £44m for Cinderford in total. This creates a greater need in terms of floorspace requirement for Cinderford which is based on the fact that Tesco will only draw 20% of turnover from the existing stores in Cinderford.

Table Q: Recommended Levels of Convenience Floorspace Capacity in the Forest of Dean, 2007-2021

Town	Quantitative Need		
	2012	2016	2021
Lydney	0-294sq m (£3.0m)	0-440sq m net (£4.6m)	0-624sq m net (£6.8m)
Cinderford	647-1,071sq m net (£7.7m - £13.6m)	823-1,156sq m net (£8.7m - £15.0m)	925-1,259sq m net (£10.1m - £16.8m)
Coleford	247-1,020sq m net (£2.5m - £10.5m)	302-1,106sq m net (£3.2m - £11.7m)	370-1,220sq m net (£4.0m - £13.3m)
Newent	481-1,172sq m net (£5m - £12.1m)	539-1,257sq m net (£5.7m - £13.3m)	610-1,361sq m net (£6.6m - £14.8m)

Notes:
The above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report.

The upper end of the floorspace capacity projections are based on Tesco benchmark convenience sales density information and these projections should be reconsidered as and when planning applications are submitted. For example, there may be an opportunity for an enhanced level of capacity but this will depend on the characteristics of the individual proposal and the acceptability of an enhanced catchment area for Cinderford.

Figure 1 - Convenience floorspace capacity (taken form GVA Grimley report 2008)

3. History and Past Studies

Table R: Recommended Levels of Comparison Floorspace Capacity in the Forest of Dean, 2007-2021

Town	Quantitative Need		
	2012	2016	2021
Lydney	232-1,354sq m net (£1.3m - £7.5m)	488-1,696sq m net (£3.0m - £10.3m)	1,044-2,444sq m net (£7.1m - £16.6m)
Cinderford	220-1,164sq m net (£1.2m - £6.5m)	499-1,516sq m net (£3.0m - £9.2m)	1,107-2,286sq m net (£7.5m - £15.5m)
Coleford	173-721sq m net (£1.0m - £4.0m)	326-916sq m net (£2.0m - £5.6m)	652-1,336sq m net (£4.4m - £9.1m)
Newent	186-686sq m net (£1.0m - £3.8m)	318-841sq m net (£1.9m - £5.1m)	609-1,226sq m net (£4.1m - £8.3m)

Figure 2 - Comparison floorspace need (taken from GVA Grimley report 2008)

3.1.3 These figures have provided the evidence of need for retail space in the District and have been useful in providing figures for the core strategy. This vital information is also important in the determination of retail based planning applications across the core strategy period.

3.2 GVA Grimley Forest of Dean Retail Study Update 2011

3.2.1 The GVA Update report to the Retail Study undertaken in 2008 provides a revised quantitative assessment of the retail floorspace need for the district. This follows a change in key evidence figures including population growth forecasts, change in retail expenditure forecast and a number of small retail commitments given permission following the original retail study assessment.

3.2.2 Since the initial study there have also been a number of policy changes as mentioned in section 2 of this report. Key changes being the replacement of the national planning policy statement, PPS 6: Planning for Town Centres with PPS 4: Planning for Sustainable Economic Growth. Further to this change the Planning Policy Statements have now been replaced by a single planning guidance document in the form of 'The National Planning Policy Framework' (NPPF).

3.2.3 The key purpose of the update report was to provide new floorspace need figures to reflect the changing population growth forecast etc. These figures are as below (Figure 3 & 4).

3. History and Past Studies

Table A: Recommended Levels of Convenience Floorspace Capacity in the Forest of Dean, 2011-2026

Town	Quantitative Need		
	2016	2021	2026
Lydney	Up to 570sq m	Up to 714sq m net	Up to 860sq m net
Cinderford	724-1,293sq m net	801-1,389sq m net	881-1,504sq m net
Coleford	336-980sq m net	388-1,059sq m net	384-1,142sq m net
Newent	591-1,276sq m net	631-1,350sq m net	671-1,1415sq m net

Notes:
The above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report.

The upper end of the floorspace capacity projections are based on an indicative convenience sales density of £12,000/sq m at 2011 (projected forward using increases in floorspace efficiency up to 2026) and these projections should be reconsidered as and when planning applications are submitted.

Figure 3 - Convenience floorspace capacity (GVA 2011)

Table B: Recommended Levels of Comparison Floorspace Capacity in the Forest of Dean, 2011-2026

Town	Quantitative Need		
	2012	2016	2021
Lydney	545-1,820sq m net	941-2,338sq m net	1,366-2,934sq m net
Cinderford	642-1,611sq m net	1,116-2,199sq m net	1,650-2,861sq m net
Coleford	84-920sq m net	279-1,187sq m net	479-1,507sq m net
Newent	229-1,115sq m net	399-1,361sq m net	584-1,673sq m net

Notes:
The above floorspace capacity figures outlined above can only be indicative, as the sales densities used may vary from the specific trading characteristics of individual proposals which may be submitted to FODDC. Therefore, we urge the local planning authority to also have regard to the surplus retail expenditure figures contained within the statistical analysis of capacity contained within appendices to this report.

Figure 4 - Comparison floorspace capacity (GVA 2011)

4. National Retail Trends

4 National Retail Trends

4.1 Total retail sales trend (GB)

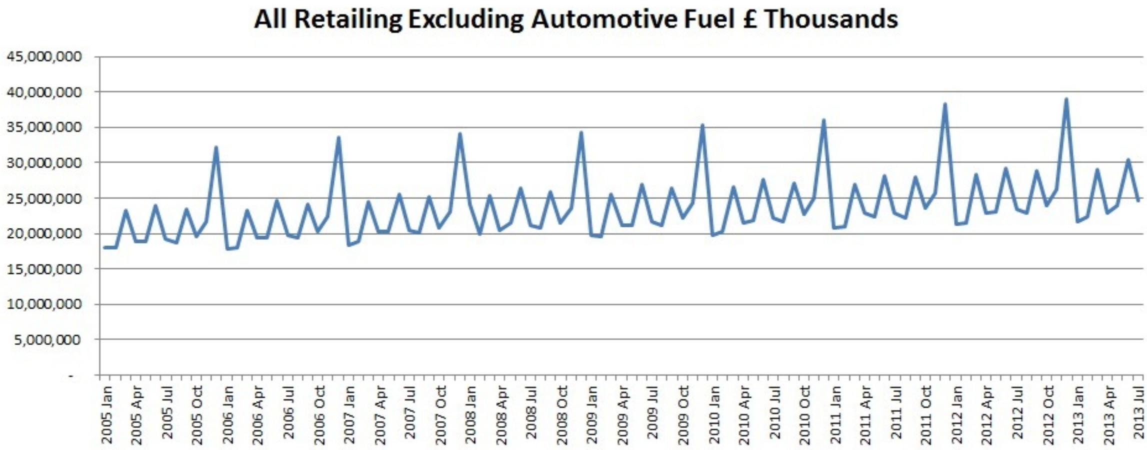


Figure 5 - Total Retailing (Excl. Fuel) Jan 2005 - July 2013

4.1.1 The National retailing sector of the economy has seen an increase in value since Jan 2005. The trend shows a number of peaks and troughs which represents the seasonality of the sector particularly during November and December just prior to Christmas. Based on the Jan 2005 figure, the retailing sector had grown by 37.6% by July 2013 in Great Britain a total of £6.7 Billion into the economy (Figure 5 above). This is reflected by a year on year growth of 2.5% across all retail sectors in total (Figure 6 below).

4. National Retail Trends

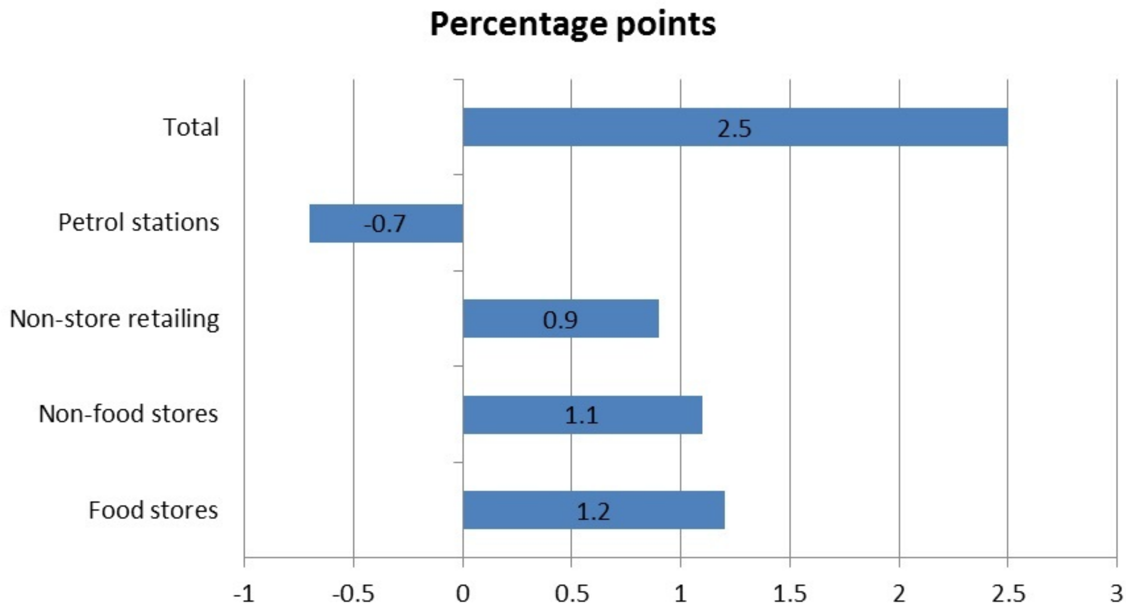


Figure 6 - Percentage year-on-year increase in value for retail sectors

4.2 Internet sales retailing (GB)

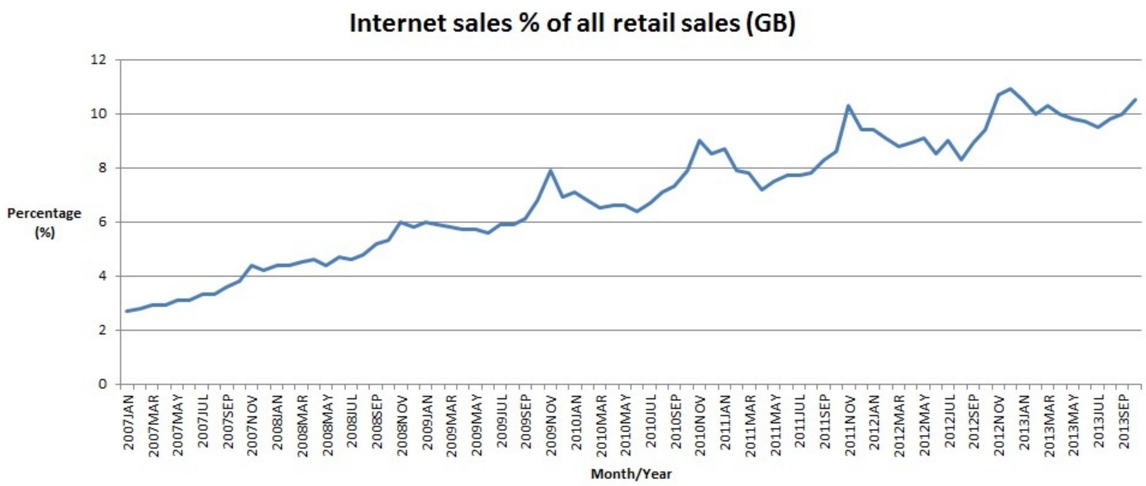


Figure 7 - % Internet sales of all retail sales

4.2.1 The percentage of internet sales from a total of all retail sales has increased from 2.7% in January 2007 to 10.5% by October 2013. In October 2013 the year-on-year growth figure based on the 2010 internet sales figures was 15.9% increase for all online retailing. The trend indicates that the amount of retail sales completed online will increase which could have an impact on in store retail sales and in turn a possible impact upon town centres (Figure 7).

5. Update survey and comparison

5 Update survey and comparison

5.1 Cinderford

5.1.1 Over the course of the survey periods, Cinderford has remained fairly stable in terms of overall number of town centre units (Figure 8). Although the town lost a number of units across the period which could have been a reflection of the economic downturn, it has recovered well to date and still acts as one of the key shopping towns in the Forest of Dean District.

Use Class	Cinderford			
	1999	**2008**	**2009**	**2013**
A1	58	56	52	44
A2	22	16	14	11
A3	0	4	4	9
A4	1	2	1	2
A5	0	6	7	7
B1	6	3	2	5
B8	0	0	0	0
C1	0	0	0	0
D1	2	3	3	13
D2	0	1	1	1
Vacant	23	15	19	17
Sui Generis	2	2	2	3
Total	**114**	**108**	**105**	**112**

Figure 8 - Cinderford Town Centre Uses

5.1.2 If we break down these figures even further to just the number of units that fall within the A classes (e.g. retail uses, financial/professional services, restaurants/cafes), we can start to see where numbers have been lost and gained.

5. Update survey and comparison

Use Class	Cinderford			
	1999	**2008**	**2009**	**2013**
A1	58	56	52	44
A2	22	16	14	11
A3	0	4	4	9
A4	1	2	1	2
A5	0	6	7	7
Total 'A' Uses	**81**	**84**	**78**	**73**
Total Other Uses	**33**	**24**	**27**	**39**
Total Vacant Units	**23**	**15**	**19**	**17**

Figure 9 - Cinderford Town centre 'A' Uses

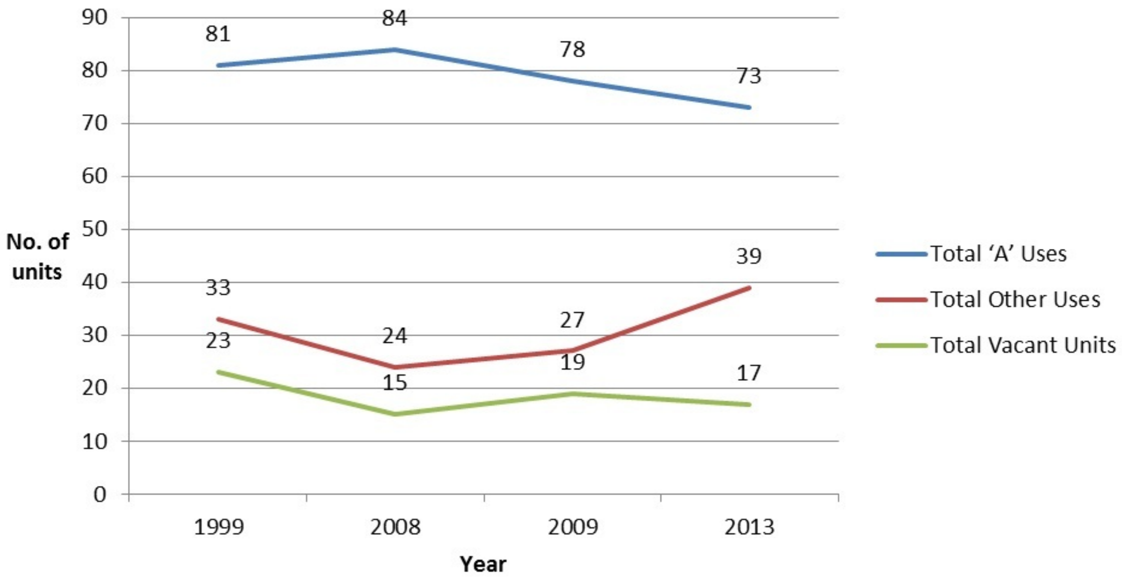


Figure 10 - Comparison of figures breakdown

Figures 9 and 10 above both show us how and where the total numbers for different types of uses have changed. They indicate a gradual decline in both 'A' Class uses and also the total number of vacant units within the town centre. Although the total number of town centre retail 'A' uses and vacant units have declined the loss to these classes has been mostly absorbed by the 'Other Uses' group which includes business offices, non-residential institutions, dwellinghouses, Sui Generis uses etc.

5. Update survey and comparison

Although a decline in the number of vacant units within the town centre is a good thing, what was previously a vacant shop retail unit may now have been accommodated by a different office use or converted into a residential dwelling.

Conversion of vacant shop units to residential use especially in the retail core of the town centre could be seen as damaging to the vitality of the town as a retail centre and could have an impact on the footfall and use of shops. However, conversion of some units in acceptable areas of the town centre, has provided viable uses for buildings and meant that they no longer stand vacant and in decline.

Ever changing markets and demand means that vacant and accommodated units within town centres are likely to move in and out of a mix of uses but a focus on a retail core must be retained to support the town centre trade.

5.2 Cinderford footfall figures

5.2.1 Figure 11 below shows the average footfall figures calculated from survey work carried out in the years as stated in the table. The methodology for this survey work involved taking footfall counts at ten minute intervals for an hour in total. Counts were taken at two different locations (same locations for each year surveyed) at the same times and footfall figures averaged.

	Year			
	1999	**2008**	**2009**	**2013**
Average Footfall figures **(No. of Persons)**	212	85	91	88

Figure 11 - Cinderford footfall figures

5.2.2 The footfall values calculated for 1999 throughout this document are calculated using a different methodology to the other years. The 1999 footfall counts were undertaken by the planning consultants Drivers Jonas as part of their 1999 town centre health check reports. The methodology in 1999 for all four towns was as follows:

5.2.3 *'Day figures – Readings were counted for 24 minutes out of 6 hours, between the hours of 10.00 – 17.00. Count sites are the same locations as the 2013, 2009, 2008 data - outside of the Spa and the opposite side of the road. Figures given are grossed up by a factor of 15, the reciprocal of the sampling fraction (i.e. 15 x 24minutes = 360 (6 hours), to allow for the fact that on either day pedestrian movements were counted for a total of 24 minutes out of 6 hours'*

5. Update survey and comparison

5.2.4 This differing methodology does make it more difficult to look at the trend between number of retail units and footfall figures. If we disassociate 1999 with the other years we have survey data for, we should still be able to make some useful connections.

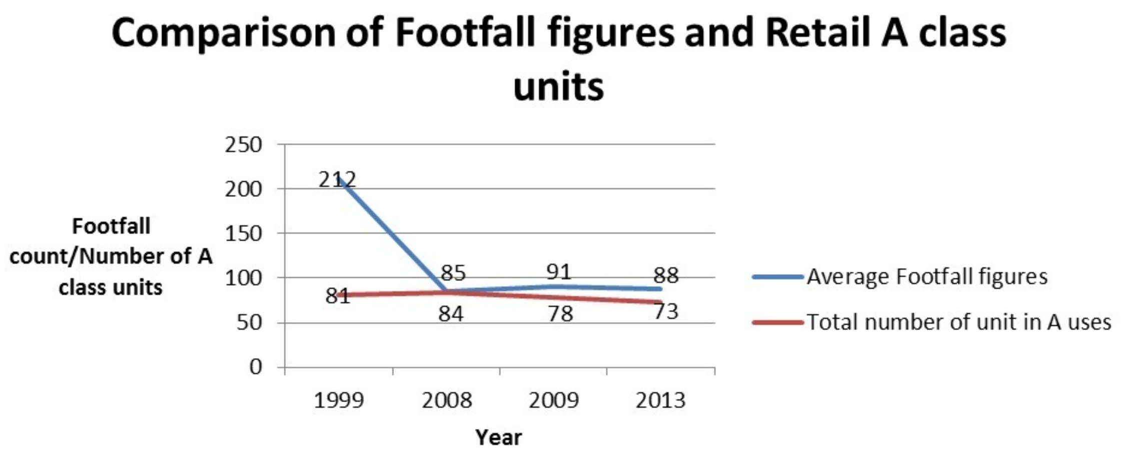


Figure 12 - Comparison of footfall figures and retail A class units

5.2.5 Figure 12 above shows the footfall counts carried out on the same years as the retail unit surveys of Cinderford town centre. The graph is intended to show any correlation between the decline in shop units and a decrease in footfall. As mentioned above the 1999 footfall figure was calculated using a different methodology and therefore it appears to be an anomaly on the graph.

5.2.6 Despite this the graph clearly shows a trend and correlation between footfall and the number of retail units in the town centre. It shows that the footfall figures have fallen slowly in parallel with the decline in overall number of A uses within Cinderford town centre.

5.3 Coleford

5.3.1 Coleford has seen a small increase in the total number of units within the town centre since 1999 but from 2008 onwards the total figure has remained much the same. Although total numbers have remained the same there has been much movement in, out and between different uses. Units lying vacant decreased and then increased again in total numbers and currently accounts for 23.8% of all units in total (2013 Survey).

5. Update survey and comparison

5.3.2 The number of A5 Hot Food Takeaways has increased significantly since 1999 and now accounts for 16.8% of the total number of units[1]. Coleford town centre has also seen an increase in Sui Generis Uses which includes things like sale of fuel, tattoo shops, vehicle sales, laundrettes etc. Although these are uses other than retail shops they have provided viable uses to some vacant units.

Use Class	Coleford			
	1999	**2008**	**2009**	**2013**
A1	66	73	73	63
A2	23	17	18	12
A3	7	11	9	7
A4	2	4	5	5
A5	0	8	8	12
B1	6	7	9	4
B8	0	0	0	0
C1	0	0	0	0
D1	3	7	8	8
D2	2	1	1	1
Vacant	14	9	8	17
Sui Generis	4	3	3	11
Total	**127**	**140**	**142**	**140**

Figure 13 - Coleford Town Centre Uses

As explored in the other town sections of this document if we group the different use class letters we can draw more conclusions on the changes that have occurred to Coleford town centre (Figure 14).

1 Percentage change between 1999 figure and 2013 survey figure for number of units within A5 Hot food takeaway class.

5. Update survey and comparison

Use Class	Year			
	1999	**2008**	**2009**	**2013**
A1	66	73	73	63
A2	23	17	18	12
A3	7	11	9	7
A4	2	4	5	5
A5	0	8	8	12
Total A uses	98	113	113	94
Total other uses	15	18	21	29
Total vacant uses	14	9	8	17

Figure 14 - Coleford Town Centre 'A' Uses

Figure 14 summarises the retail surveys further with regards to which type the units fall within. The total figures for A uses and other uses gives us some idea of where any change in numbers are going to and where from. Vacant unit figures have dipped and then risen sharply by 2013. This coincides with the loss of a number of ‘A’ use units some of which appear to have been claimed by the other uses group.

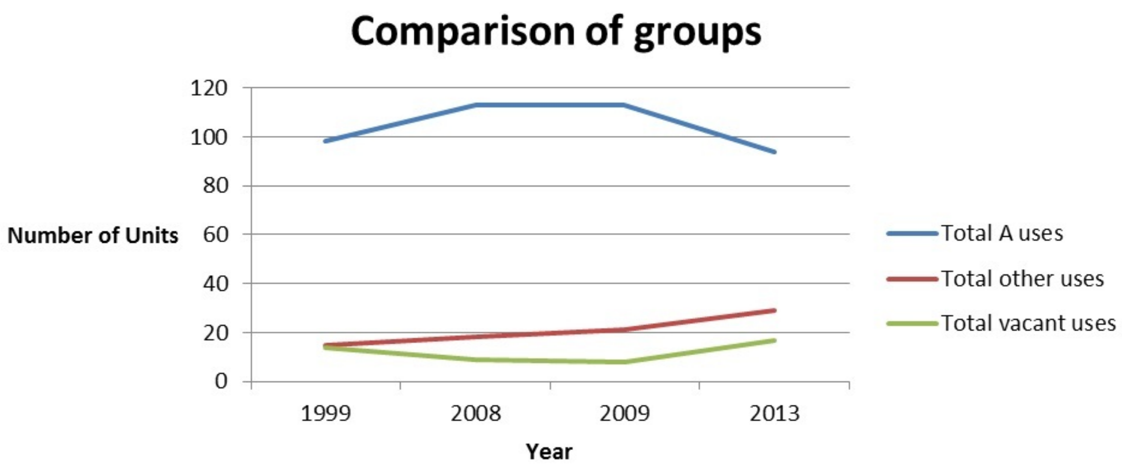


Figure 15 - Comparison of Groups

Figure 15 shows fairly flat lines with no large changes in unit numbers within each group. Where there are increases or decreases other groups display opposite reactions. Few units have been lost to residential, but instead have remained vacant or gone to another class group other than ‘A’ class.

5. Update survey and comparison

There appears to be a changing trend of more of a variety of uses coming into Coleford town centre that fall outside the A group of uses. This is not necessarily a bad thing as a use providing a town centre function is better than a unit standing vacant for long periods of time which could possibly end up being converted to a residential dwelling. Any residential development at ground floor level in the town centre will undermine the functionality as a town retailing centre although it should be encouraged above ground floor level.

5.4 Coleford footfall figures

5.4.1 Counts taken across the four survey years show an overall increase in footfall in Coleford town centre since 1999. The averages below were taken from a set of 10 minute counts taken within one hour in the same locations on a number of days as explained in Section 5.2 above.

	Year			
	1999	**2008**	**2009**	**2013**
Coleford	29	47	40	72

Figure 16 - Coleford footfall figures

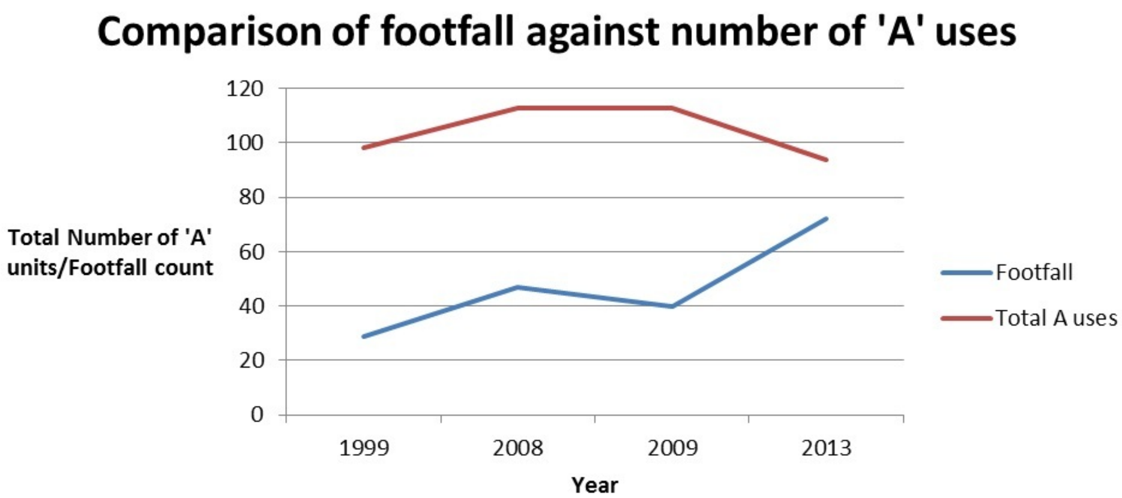


Figure 17 - Comparison of footfall against 'A' uses

As with the other towns in the district, Coleford follows suit in terms of a correlation between footfall and the number of ‘A’ uses within the town centre. Generally as the number of ‘A’ uses in the town centre has increased the town centre has seen an increase in the footfall through the town and vice versa.

5. Update survey and comparison

However, Coleford does have an interesting and unique exception to this trend. In 2013 the number of A class retail units had fallen in comparison to the 2009 retail survey figure, but during the 2013 footfall count the figure was higher than the previous count carried out in 2009.

This suggests that even though the number of 'A' uses had fallen in the town centre the footfall had still increased possibly due to the increase in other uses in the town that had taken their places. This could mean that a mixture of uses other than just retail uses would be beneficial to the town centre in the long term, provided that the main retail core held some protection.

A substantial increase in footfall figures could also be related to natural population growth or visitors to the town. Despite this, all footfall counts and retail surveys were carried out at the same time of year and in the same season. Therefore, any trend difference could be related to the change in business types we are seeing in the town centres and not a flaw in the survey methodology.

5. Update survey and comparison

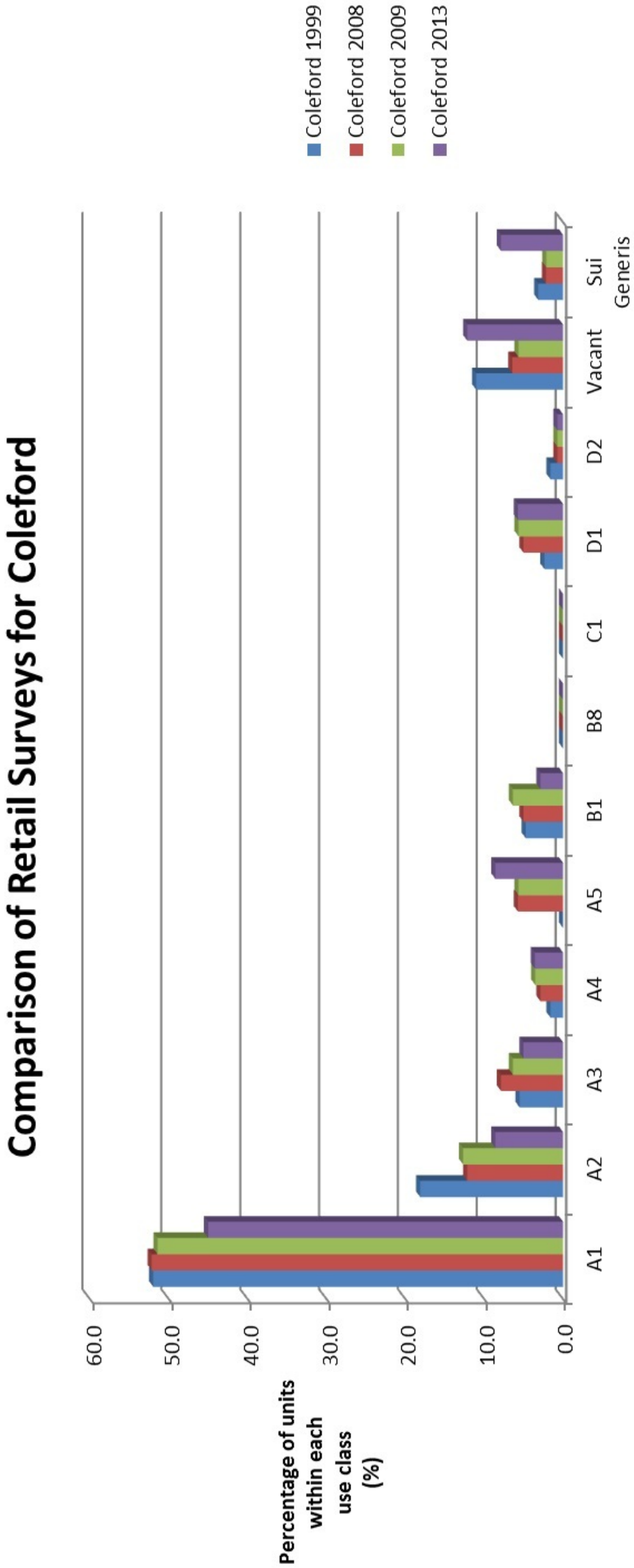


Figure 18 - Coleford Town Centre Survey

5. Update survey and comparison

5.5 Lydney

5.5.1 Lydney has seen a significant increase in the total number of town centre units since 1999 although the number of vacant units has also increased substantially. In most recent survey work (2013), out of all units in the town centre 10.7% were vacant compared to a figure of 3.2% in 1999 (Figure 19). As before with Cinderford and Coleford it is best to get a better understanding of which uses/units have been lost or become vacant by summarising the A Classes and other group classes.

Use Class	Lydney			
	1999	**2008**	**2009**	**2013**
A1	73	-	78	70
A2	22	-	20	23
A3	11	-	13	11
A4	2	-	6	2
A5	0	-	9	10
B1	4	-	5	2
B8	0	-	0	1
C1	1	-	0	0
D1	5	-	7	12
D2	0	-	2	1
Vacant	4	-	10	17
Sui Generis	3	-	6	10
Total	**125**	**-**	**156**	**159**

Figure 19 - Lydney Town Centre Uses

5. Update survey and comparison

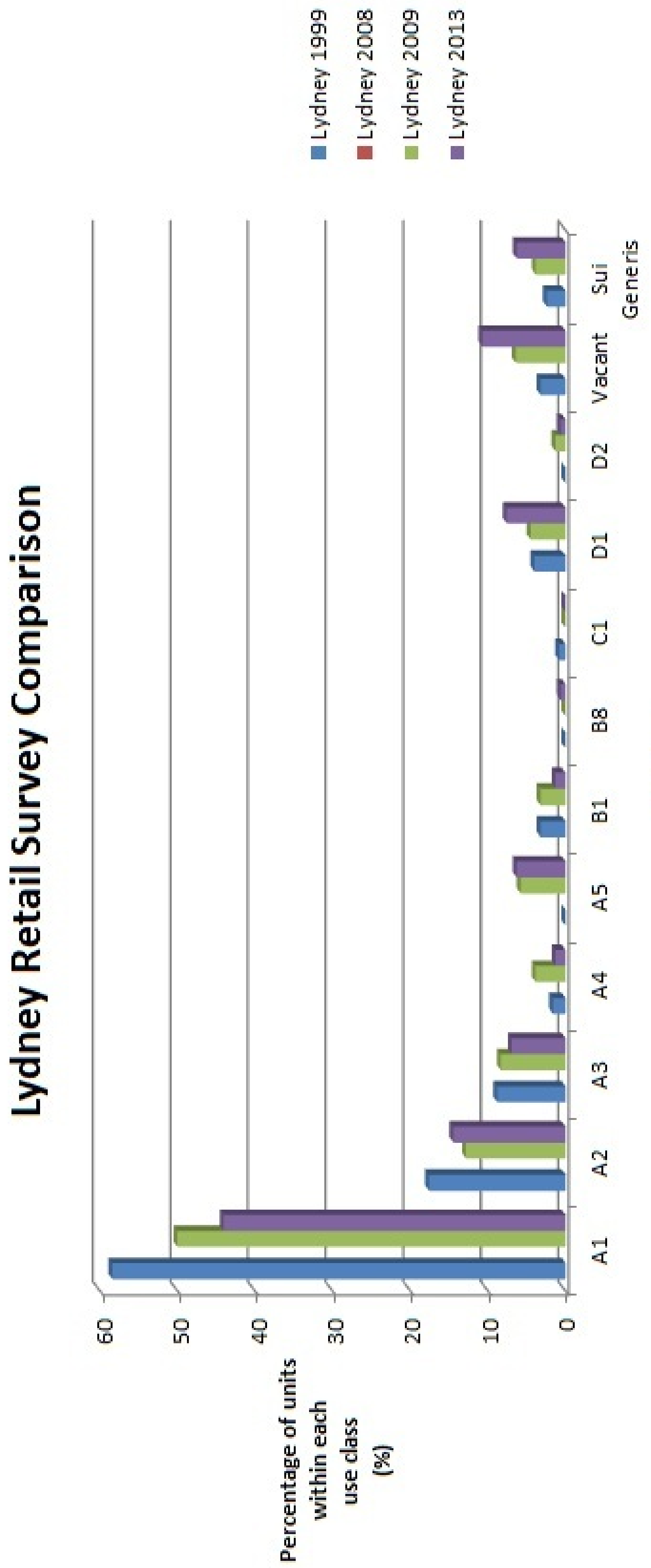


Figure 20 - Lydney Retail Surveys comparison

5. Update survey and comparison

Use Class	Lydney			
	1999	**2008**	**2009**	**2013**
A1	73	-	78	70
A2	22	-	20	23
A3	11	-	13	11
A4	2	-	6	2
A5	0	-	9	10
Total ‘A’ Uses	**108**	**-**	**126**	**116**
Total Other Uses	**17**	**-**	**30**	**43**
Total Vacant Units	**4**	**-**	**10**	**17**

Figure 21 - Lydney Town Centre 'A' Uses

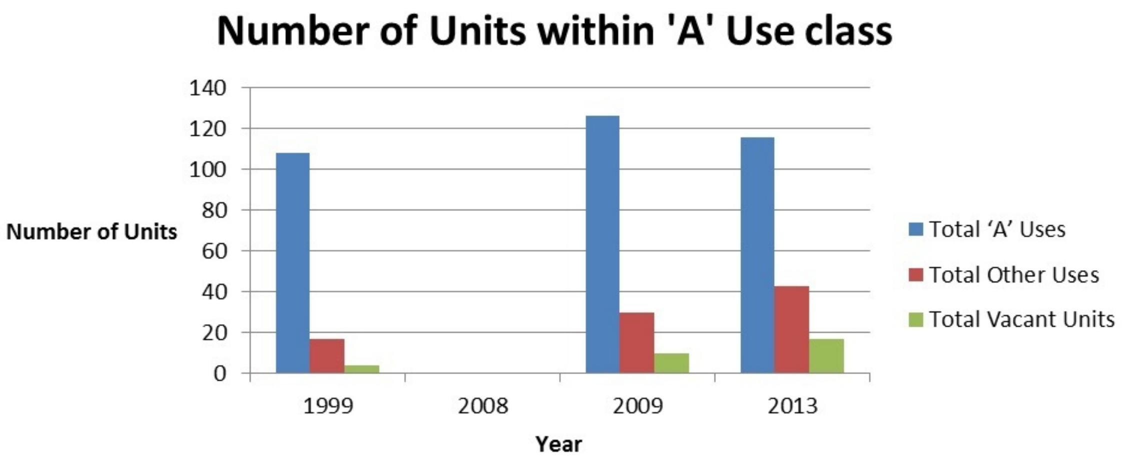


Figure 22 - Lydney 'A' Uses

Lydney town centre has seen an overall decrease in ‘A’ Class uses although many of these units have been taken up by other acceptable town centre uses. There has been a steady increase in four different use classes including A2, A5, D1 and Sui Generis. Unfortunately although many of the ‘A’ uses have been taken up by different A, D or Sui generis uses there has still been an increase in the overall number of vacant units within the town centre, most of which are a result of A1 uses closing down. There has clearly been a shift in numbers from retail sales premises to more business/takeaway/café type uses as a result of the changing economy and other factors impacting general town centre activity.

5. Update survey and comparison

5.6 Lydney footfall figures

5.6.1 Figure 23 shows the footfall counts taken on the same years as the retail unit surveys. Interestingly, the figures seem to rise then fall with a peak footfall count in 2008 of 86 people. This could coincide with and be partly a result of the opening of the new Tesco store on the High Street. The medium sized supermarket does support Lydney for a high proportion of its food shopping along with the Co-operative store on Newerne Street. This will have an impact upon footfall within the town centre.

Towns	Year			
	1999	**2008**	**2009**	**2013**
Lydney Footfall Counts	44	86	65	55

Figure 23 - Lydney footfall counts

5.6.2 The footfall and A unit figure comparison in the graph below (Figure 24) shows a familiar correlation to Cinderford. Despite having no retail unit survey data for 2008, there is still an obvious correlation between footfall and the number of retail units in the town centre. This being, as the number of retail units falls as does the footfall through the town centre.

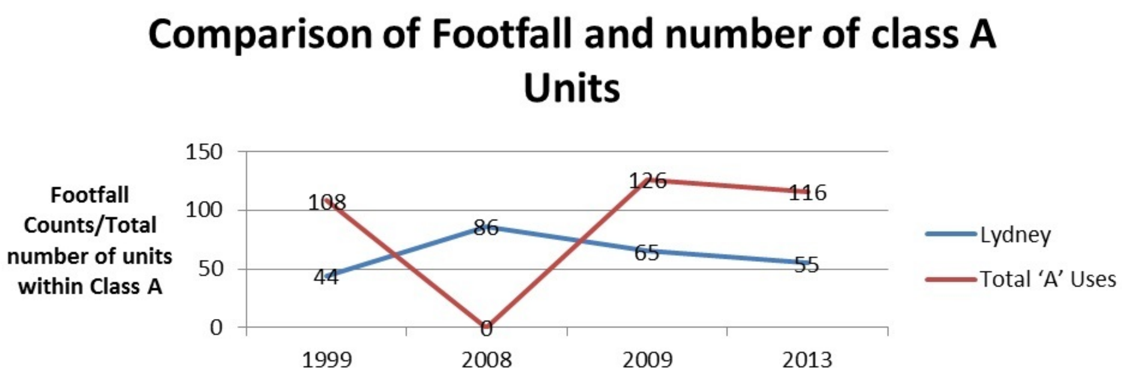


Figure 24 - Comparison of footfall against no. of A class units in Lydney

5. Update survey and comparison

5.7 Newent

5.7.1 Newent has remained the most stable of all the towns over the survey period and has increased in the total number of town centre units. The percentage of vacant units in the town centre has reduced from 8.8% in 1999 to 6.8% in 2013[(2)]. Newent is the only major settlement supporting the North of the district in terms of shopping without having to travel outside of the Forest of Dean District and therefore has a healthy active town centre.

Use Class	Newent			
	1999	**2008**	**2009**	**2013**
A1	43	48	-	49
A2	22	12	-	9
A3	4	7	-	5
A4	3	1	-	4
A5	0	3	-	5
B1	0	3	-	8
B8	0	0	-	0
C1	0	0	-	0
D1	4	7	-	9
D2	2	0	-	0
Vacant	10	7	-	7
Sui Generis	0	0	-	1
Total	**88**	**88**	**-**	**97**

Figure 25 - Newent Town Centre Uses

2 Percentage calculated as proportion of total town centre units for each survey year.

5. Update survey and comparison

Use Class	Newent			
	1999	**2008**	**2009**	**2013**
A1	43	48	-	49
A2	22	12	-	9
A3	4	7	-	5
A4	3	1	-	4
A5	0	3	-	5
Total 'A' Uses	**72**	**71**	**-**	**72**
Total Other Uses	**6**	**10**	**-**	**18**
Total Vacant Units	**10**	**7**	**-**	**7**

Figure 26 - Newent Town Centre 'A' Uses

The number of units within the A1 class in the town centre has increased steadily since 1999. This is a trend not seen in any of the other three towns and Newent has fared well despite the economic downturn. There has however been a loss in other A class uses.

Class A2 which includes Financial and Professional services such as accountants, solicitors etc. has seen a drastic decline in numbers from 22 units (19%) in 1999 down to only 9 units (8.7%) in 2013.

Some of these loses appear to have been taken up by A3 and A5 uses which have steadily increased of the last few years. The remainder lost from the A class have gone to other uses which have substantially increased in numbers from 6 units (5%) in 1999 to 18 units (15.8%) in 2013[3].

3 Percentage figures are a proportion of all uses recorded in the town centre in each respective year.

5. Update survey and comparison

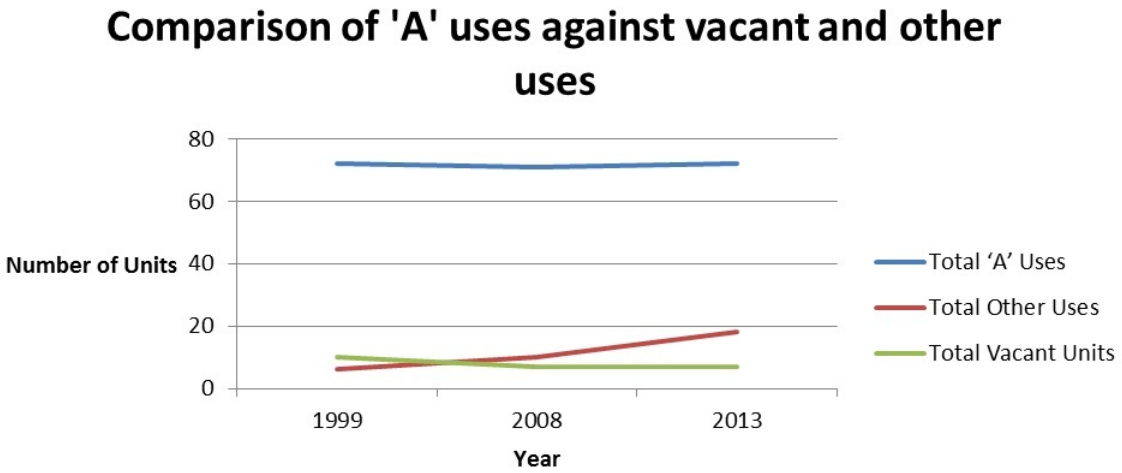


Figure 27 - Comparison of uses

The number of vacant units within the town centre has remained roughly the same across the period, although they may not necessarily have been the same vacant units. Surveys were taken at roughly the same time of year and may also have been subject to some element of seasonality. For example in Newent many small craft type businesses (A1) tend to use the Christmas period to boost sales by setting up small shops overs the period when there is technically the highest footfall and shopping through the town.

5.8 Newent footfall figures

5.8.1 Overall footfall figures in Newent (Figure 28 below) have increased over the years apart from a higher survey result in 2008. This could have been a result of particularly good weather which encouraged more shoppers out, an event on in the town or just a higher than average count in one location.

	Year			
	1999	**2008**	**2009**	**2013**
Newent	28	88	49	58

Figure 28 - Newent footfall count

5.8.2 Figure 29 shows a similar picture and correlation between footfall and the total number of A class uses as the three other towns, except for the few anomalies in the graph which can be explained. Firstly there was no retail survey carried out for Newent in 2009 hence the figure of 0. The high peak in footfall figures in 2008 can be classed as an anomaly. It was probably a result of a high count during one of the ten minute counts during the hour. This high ten minute count could have caused the overall average to be raised and skewed the results.

5. Update survey and comparison

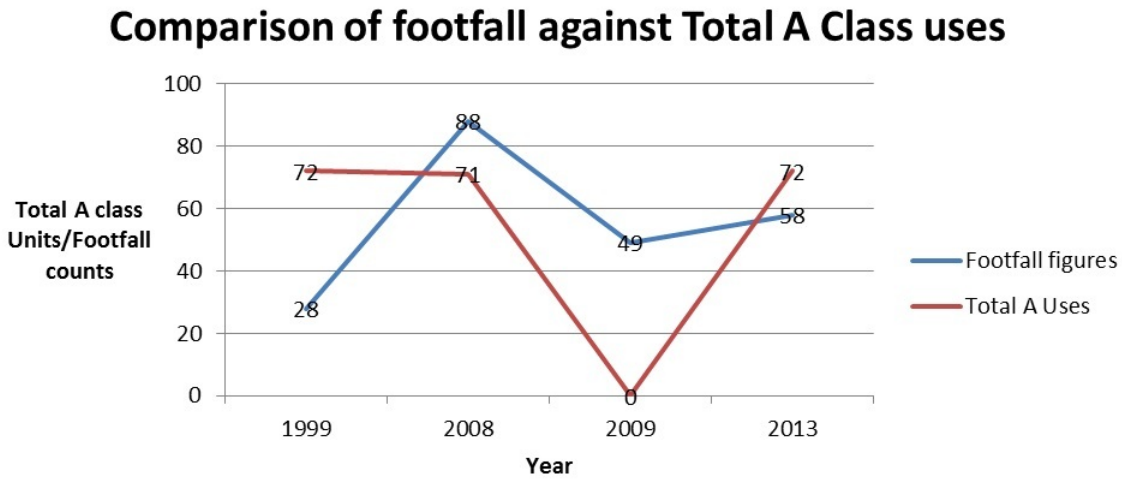


Figure 29 - Comparison of footfall against total 'A' class uses

5.9 Comparison of towns

5.9.1 The above sections have analysed in more detail the summary table in section 9.2 of the appendices which highlights differences between the towns in terms of numbers and percentages of units and within each use across the different survey years.

5.9.2 The figures in the comparison table in section 9, clearly indicate a difference in the overall number of units in each of the towns, firstly due to their size and almost identifies a hierarchy in terms of shopping choice due to the higher number of units between the towns themselves. Lydney appears to be the leading town centre in terms of number of shops closely followed by Coleford. Newent has the lowest number of shop units in the town centre, however Newent also has the lowest vacancy rate of all the four towns across the survey periods. Newent also benefits from a better variety of uses and also independent shops. Its location to the north of the district also means that the town supports much of the agricultural area to the north of the district whereas the other three towns offer much more competition to each other due to their relatively close proximity.

5.9.3 To eliminate the effects on the size of the towns in proportion to each other influencing how we compare figures it is easier to look at the same data but in percentage terms which allows better comparison of numbers within each use compared across the four towns as seen in the second table of section 9.

5.9.4 This percentage breakdown now shows us the proportional differences between towns for individual use classes. The proportion of units within the A1 class is around 50% for all the towns with the lowest at 49% (Newent) and highest at 58% (Lydney). Use class C1 (Hotels) has the lowest proportion of uses. There is only one hotel in the four towns within the town centre boundaries and this is in Lydney.

5. Update survey and comparison

5.9.5 Vacancy figures for the four towns vary ranging from lows of 7.2% (Newent) to 15.2% (Cinderford) according to the 2013 retail survey update. It is noticeable that the vacancy rates for the four towns over the period of surveys have been quite variable. Cinderford has seen an overall decrease in vacancy rates but had a higher figure in 2009 compared with the 2008 figure. Lydney is the only out of the four towns which has experienced a steady rise in the number of vacant units within the town centre rising to 10.7% (17 units) by 2013. Newent being the smallest town with the lowest vacancy has seen the opposite, with a steady decrease in the vacancy rate within the town centre. This was a fall from 11.4% (10 Units) in 1999 to only 7.2% (7 Units) in 2013.

5.9.6 All four towns have seen a change in the number of units within use class A5 Hot Food Takeaways. For the purpose of the graph below survey figures have been estimated for the two survey year dates that information was not collected for Lydney in 2008 and Newent in 2009.

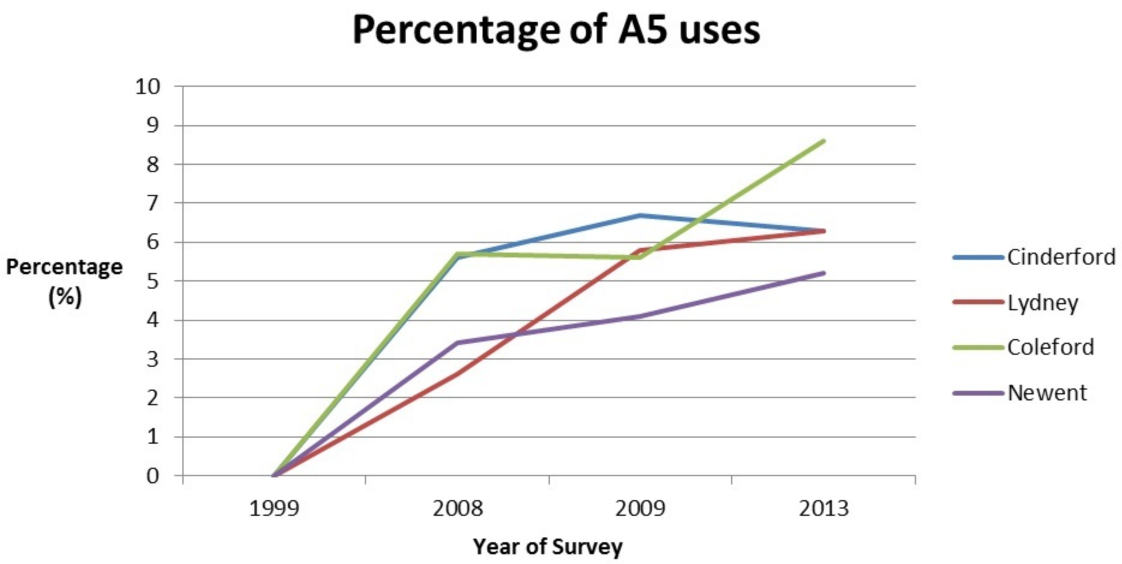


Figure 30 - Percentage of A5 uses

5.9.7 It appears that since 1999 the number of Hot Food Takeaways in the Forest of Dean District has increased significantly from 0 for all towns to 12 in Coleford, 10 in Lydney, 7 in Cinderford and 5 in Newent by 2013. This could explain part of the loss in A class uses during the same period.

5.9.8 A similar trend can be seen with the proportion of D1 uses increasing in all towns which could account for the loss of other A class uses not taken up by A5 uses.

5. Update survey and comparison

5.9.9 The four towns have generally all seen a decrease in the number of units falling within class A2 'Financial and Professional Services' over the survey period possibly as a result of the economic downturn. Lydney appears to still have a significant proportion of A2 uses in comparison to the other towns where numbers have fallen significantly. Lydney currently has 23 units in A2 whereas the other towns have around 10.

5.9.10 The trend of Sui Generis uses has seen an overall increase as a rule for each of the towns with Lydney and Coleford seeing a much more significant increase in this use than the other two towns.

5.9.11 The footfall figures have been linked to trends in the changes in the number of units in the above section and now we will compare the footfall figures for each town and draw any common conclusions.

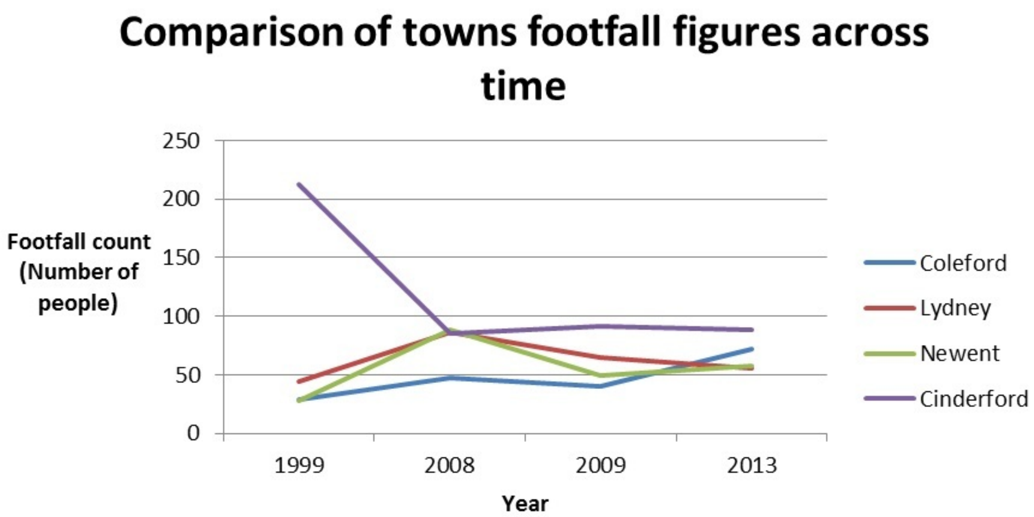


Figure 31 - Comparison of footfall figures for all four towns

5.9.12 From the graph above we can see a fairly well related trend in footfall within the four towns over the survey period. Coleford has seen the lowest footfall counts throughout the period despite overtaking Lydney and Newent in the 2013 survey. The leading town on footfall counts was Cinderford which maintained this lead over the whole of the survey period.

5.9.13 Cinderford has an anomaly for the count taken in 1999 this could be partly due to the differing methodology used to calculate the footfall figures but also could be due to a particularly busy period in which the survey was taken. This could have been a result of visitors or school children.

5. Update survey and comparison

5.9.14 Whereas Coleford's footfall counts have generally risen all other towns have fallen across the period inline with the declining number of units falling within use class A. This could be linked to the reduced shopping choice which means people are travelling further afield to do their shopping or it could be linked to the increased demand on internet shopping or a mix of both.

5.9.15 The trend in the decline of A1 use class units can be seen across all four towns and all have a similar proportion of A1 units across the whole survey periods and all decrease in parallel. Newent currently has the highest proportion of A1 units with Lydney and Coleford very close together in terms of proportion of units leaving Cinderford with the lowest proportions of A1 shops. Lydney was missing survey data for 2008 and Newent missing data for 2009 and therefore figures have been estimated for these two gaps based on averages between the two closest survey years.

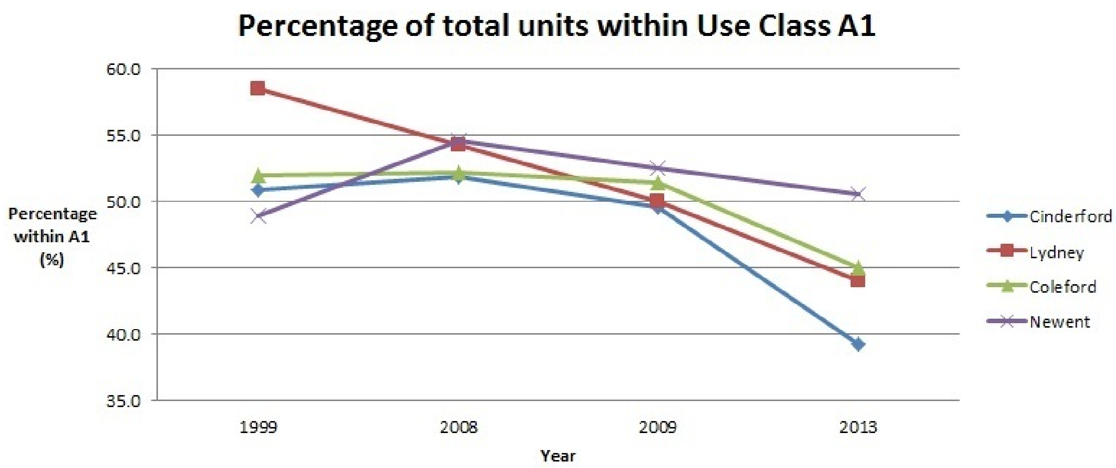


Figure 32 - Percentage of total units within Use Class A1 for all four towns across the survey periods

5.9.16 The graph above shows the trend for just A1 uses but, it is also useful to compare the total number of units that fall within the A use classes to see whether overall the towns have lost retailing units to Business (B1, B2, B8), Non-resi/assembly and leisure (D1,D2) and C class uses which includes residential and hotels.

5.9.17 The comparison of the percentage of all A class units as a proportion of the total number of units for each survey year can be seen in the graph below. Interestingly the trend is very similar to that of the trend for the percentage of just A1 uses. This indicates that the losses could have come from the A1 class. Units that fall within the A class have significantly decreased for all four towns in proportion of total units which implies they have changed to either B, C, D, or Sui Generis uses.

5. Update survey and comparison

5.9.18 The greatest proportion loss has occurred in Lydney where there is a difference of 13% from 1999 and 2013. Lydney has had the highest proportion of uses in Class A out of the four towns until 2013 where Newent has overtaken this. The three other towns have experienced a similar percentage loss of between 6-7% between 1999 and 2013 with Cinderford having the lowest proportion of total uses within the A class across all survey periods. It is evident that the four towns could be grouped in pairs to see very similar trends in the proportions of A class uses. Lydney and Newent both have very parallel trends until Newent overtakes Lydney in 2013. Whereas, Cinderford and Coleford have an almost identical trend in proportion of A uses keeping a difference of about 6% for every year surveyed.

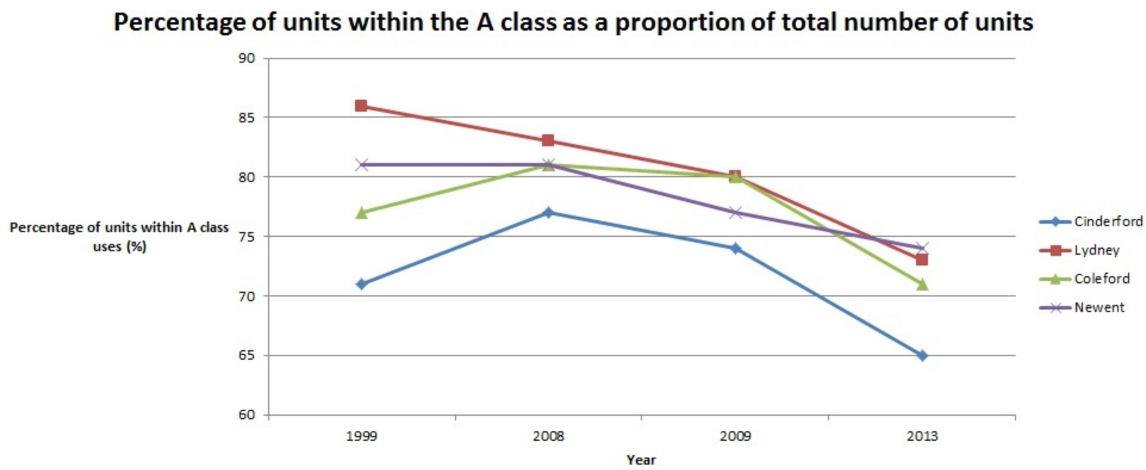


Figure 33 - Percentage of units within the A class for all four towns over the survey period

5.9.19 It is possible to draw some further conclusions about the group types of shops in our four towns. The figures have been divided in to four group categories to summarise the different type of shops that the towns in the district have most of. These four groups are Local Independent, Local Chain, National Chain and N/A.

5.9.20 Local Independent obviously relates to small one off businesses that are specific to that particular town. Local Chain refers to locally recognised chains of shops in the district such as bakeries, newsagents, estate agents, clothes/shoe shops etc. And finally N/A relates to use types that do not fall into any of the above categories such as community uses, churches, health centres etc. The table and graph below recognise the proportion of shops that fall into each of these groups for the four towns.

5. Update survey and comparison

	Proportion of shops (%)			
	Coleford	**Lydney**	**Newent**	**Cinderford**
Local Independent	55.2	64.5	69.1	51.8
Local Chain	16.1	7.9	10.3	9.8
National Chain	9.1	12.5	7.2	15.2
N/A	19.6	15.1	13.4	23.2

Figure 34 - Proportion of shops

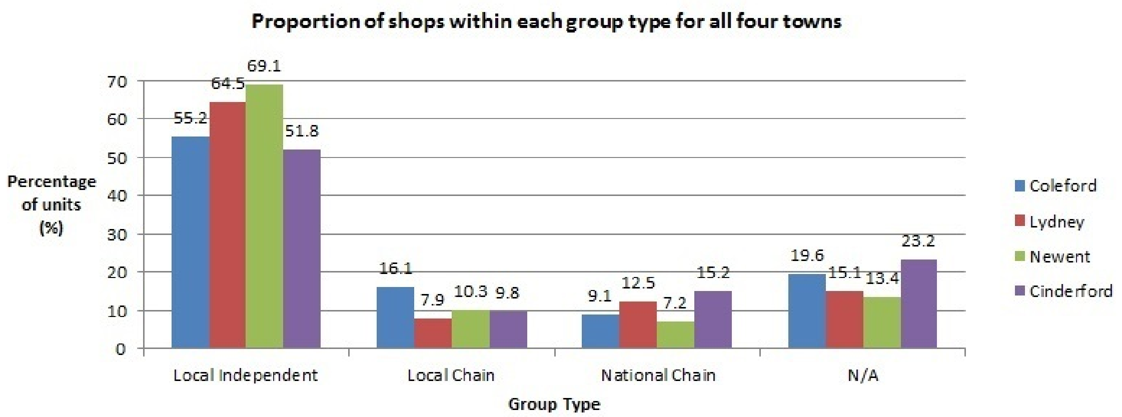


Figure 35 - Proportion of shops within each group type for all four towns

5.9.21 The graph clearly illustrates that Newent has the highest proportion (69.1%) of local independent stores in its town centre with Cinderford having the lowest (51.8%). Coleford appears to have the highest proportion of local chain stores (16.1%) in its town centre with the other three towns close together at roughly between 8-10%. Interestingly Cinderford has the highest proportion of National chain stores (15.2%) and N/A group (23.2%) and has the lowest local independent shops (51.8%). This could be illustrating the potential negative effects of trade diversion national chain stores have upon local independent shops. If we put the figures for local independent and local chain stores together this point could be illustrated further.

5. Update survey and comparison

	Proportion of shops (%)			
	Coleford	**Lydney**	**Newent**	**Cinderford**
Local Independent/chain	71.3	72.4	79.4	61.6
National Chain	9.1	12.5	7.2	15.2
N/A	19.6	15.1	13.4	23.2

Figure 36 - Proportion of shops

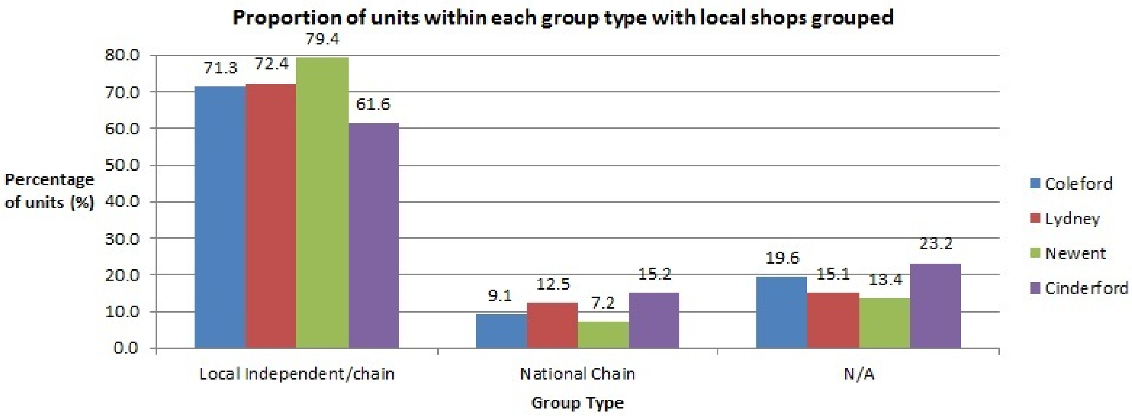


Figure 37 - Proportion of locally grouped shops types against National chains

5.9.22 The above graph and table further illustrates the correlation raised in paragraph 5.9.21 that the higher the proportion of National Chain shops the lower the proportion of Local Independents. There is a clear effect upon independent shops with an increase in national chain stores. Newent has the highest proportion of 'local' shops (79.4%), the lowest National Chain proportion (7.2%) and coincidentally the lowest proportion of N/A category uses (13.4%). Whereas, Cinderford has a significantly lower proportion of 'local' shops (61.1%) and the highest proportion of National Chain stores (15.2%) and N/A group (23.2%).

6 Retail frontages and town centre boundaries

6.1 Local Plan Policies

6.1.1 The Local Plan 2005 policies relating to town centres, now superseded by the core strategy on its adoption in February of 2012 are listed in the appendices, Section 10. Much of these policies have been replaced by the core strategy policies, however some more specific town centres policies including frontage policies will be included in the emerging Allocations plan document. Evidence from this keynote document is intended to inform the revisions to town centres boundaries and frontages adopted in the revised form of the proposals map for the Forest of Dean District alongside the Allocations Plan.

6.2 Reasons for town centre changes

6.2.1 The need for an update to the town centre boundaries, frontages and policies is a reflection of the guidance in the National Planning Policy Framework (Further Discussed in section 2.1 which refers to specific section of the NPPF). The replacement of the Local Plan 2005 with the Core Strategy means that there is no specific retail frontage policy currently in use by the council. The Allocations Development Plan document will include more specific town centre policies on retail development and frontages which will be informed by this keynote update report.

6. Retail frontages and town centre boundaries

6.3 Cinderford

Existing Primary Retail Frontages

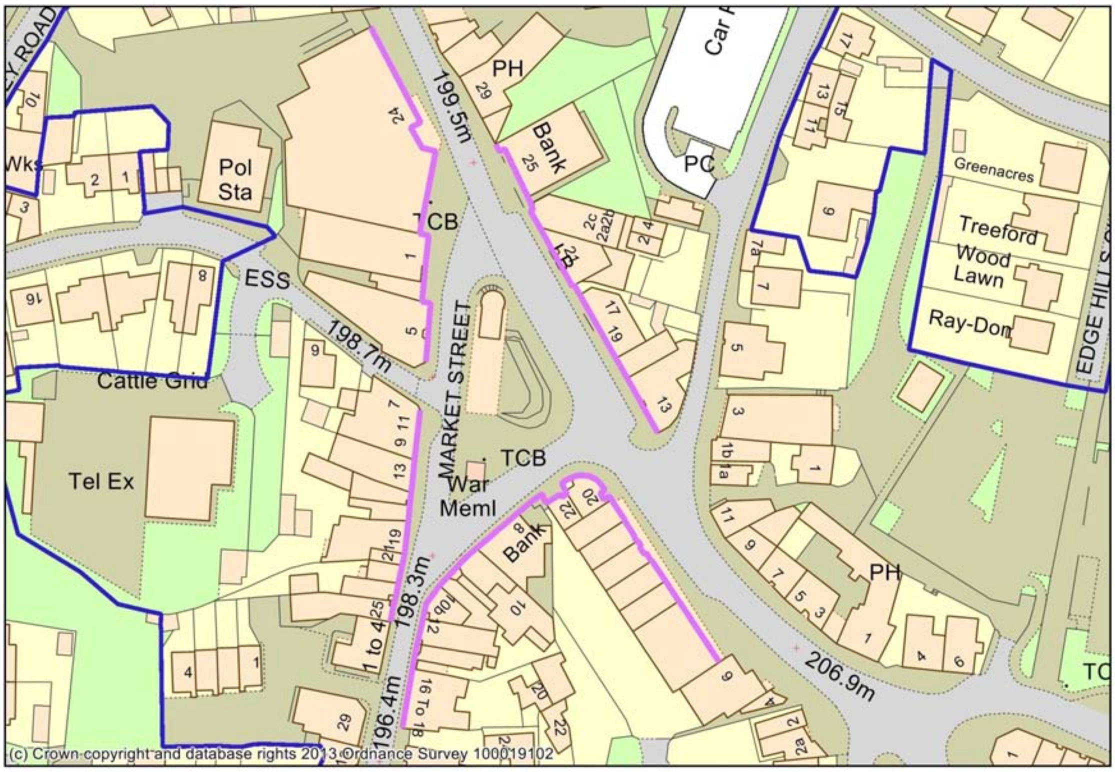


Figure 38 - Cinderford town centre Existing Primary Retail frontage

6.3.1 The existing defined primary retail frontages in Cinderford all centre around 'the triangle' where Heywood Road, Market Street and the High Street all meet. This public space displays statues in relation to the towns mining history and also to the war.

6.3.2 The frontages represent Cinderford's shopping core which hosts a range of different town centre uses. The frontages currently are quite constrained to the area around the triangle whereas there are more areas for shopping that are not currently identified. The town centre itself has very few listed buildings. The few that do lie within the town centre are the churches. However, the town still has some important buildings which help define the historic urban pattern and layout of the town.

6. Retail frontages and town centre boundaries

Figure 39 - 'The Triangle', Cinderford town centre

6.3.3 The town centre benefits from a district council maintained car park which provides good access for shoppers to the town centre. However, the capacity of the car park is often seen to be an underprovision for the needs of shopping travelling to Cinderford. As a result of this there is a parking pressure within the town that continues to pose traffic congestion and accessibility issues.

6.3.4 The first section of existing frontage identified on the proposals map is to the North side of the High Street surrounding the triangle. The current uses on this frontage include three banks, two estate agents and a newsagents. Although there is a poor mix of uses on this side of the street it is still a very well used frontage for mainly financial and property service facilities. The position of this frontage within the town centre gives it an advantage of being within the core of the town centre and as a result experiences a high footfall and number of customers shopping in the town centre. Although the uses are not all strictly within a primary retail use it is an important active frontage that needs to be identified as part of the town centre core for shopping.

Figure 40 - North side of the High Street

6.3.5 Opposite what is currently the Lloyds Bank is a small section of existing frontage that covers the largest retail unit within the town centre along with a number of smaller businesses down the first part of Market Street. The majority of this frontage is represented by what used to be known as the Beales department store now 'The Real Deal'. This is one of the largest retail units in the forest towns other than supermarket retail space. Other uses on this frontage include a hair salon and also a DIY store. All these uses fall within Use Class A1 of the Use of Classes order and fall within the definition of Primary frontage uses. It benefits from being centrally located adjacent to the triangle public space and is highly accessible from the town car park. The future of such a large retail unit within Cinderford town centre is

6. Retail frontages and town centre boundaries

uncertain and therefore the allocations plan could identify this building as potential for future redevelopment but strictly within a retail use that absolutely retains the existing street frontage onto the High Street and market Street.

6.3.6 Continuing down Market Street to numbers 11 – 25 where the existing primary retail frontage continues you can find uses such as a pharmacy, sewing supplies shop, flooring specialist, bakery, charity shop and a pet shop. This frontage offers a wide range of goods for different customers and is one of the most active street frontages in Cinderford. It also benefits from fronting out onto the triangle public space which has a war memorial which attracts visitors to this part of the town centre. Once again it is an important frontages surrounding the triangle and the frontage designation that it has been afforded should be retained in the new allocation policy on frontages.

Figure 41 - 1-5 Market Street, 24 High Street

6.3.7 The final existing frontage identified in Cinderford town centre is that of numbers 6-18 Market Street and 8-22 High Street combined. This frontage obviously extends around the block of buildings fronting Market Street and the High Street and has a wide variety of town centre uses. Once again there are no listed buildings within this frontage but there are some dominant buildings that are important features of the town centre around the triangle. Uses on this frontage included at the time of this year retail survey (2013) a newsagents, tattoo shop, restaurants, bakery, Kebab and pizza takeaway, shoe shop, café, a bank and also unfortunately a few vacant units. It is a key frontage in the town centre that provides a mix of uses and should remain as an identified protected frontage.

Figure 42 - 11-25 Market Street

6. Retail frontages and town centre boundaries

Figure 43 - 8-22 High Street, Cinderford

Figure 44 - 6-18 Market Street, Cinderford

Identification of potential new frontage

6.3.8 Cinderford currently has a very limited retail frontage identified on the adopted proposals map, which focuses around the triangle in the very centre of the town. It is suggested that the town centre shopping uses do extend further than the current identified frontage and therefore there is scope to extend and possibly identify new potential frontages in the allocations plan's review of the proposals map.

6.3.9 The first suggestion for Cinderford is an extension to the existing frontage along the High Street. This extension could include numbers 27-47 on the north eastern side of the High Street. Uses on this proposed extension to a recognised frontage include the local newspaper office, hair salon, indian takeaway, MP office, bag shop, Public House, jewellers and also a vacant unit.

Figure 45 - 24-47 High Street, Cinderford

6. Retail frontages and town centre boundaries

6.3.10 Although this part of the High Street has become less used and slightly more diluted in terms of town centre uses, this frontage is still well used by the public. It's dilution of town centre uses is partly due to its location being slightly away from the retail core of the town centre and doesn't experience the higher levels of footfall that Market Place receives from their customers and visitors to the town. Despite this, the frontage still offers different uses to what is found in the rest of the town and as a result functions as part of the town centres services. This street should be considered as part of an identified frontage within the town centre in the allocations document.

6.3.11 The existing frontage on the East side of Market Street also has the potential to be extended down towards Commercial Street. Numbers 26, 26a and 26b all fall within the definition of a town centre use and therefore this report suggests that the existing frontage is extended to include what is currently a dental surgery and a butchers shop. These uses are located very close to the triangle and mark a clear end to the town centre uses and residential properties on this side of the street and therefore should be included within the frontage designation.

Figure 46 - East side of market Street, Cinderford

Figure 47 - 4+6 High Street

6.3.12 A similar extension to the same existing frontage is proposed to the South end of the High Street. This revision is a minor addition of two shops to include what is currently a betting shop and also a charity shop (4+6 High Street) to what is already a well-established shopping frontage with a mix of uses.

6.3.13 Continuing along the High Street to the junction with Woodside Street there is a slightly separated small parade of small units (three in total) that include a Solicitors office a charity shop and also an opticians. Although these uses are not strictly all a retail use they do fall under the definition of town centre uses that give the town further professional services for its residents located within a town centre location that is easily accessible. Once again the opticians marks the end of the town centre uses core and if you continue up Woodside Street residential properties follow.

6. Retail frontages and town centre boundaries

6.3.14 The opposite side of the High Street to this small parade of shops is the frontage which includes what was The Swan public house. The frontage on this side of the street from 1-9 High Street and 2-6 Dockham Road are currently not identified as a frontage on the proposals map. The uses on this side of the High Street suggest that they are mostly within the definition of town centre uses and should be included within a designated frontage on the proposals map. Some of these uses currently include a butchers, fish and chip shop, building society, public house, coach holiday office, funeral directors office and a hair salon. The mix of uses on this street warrants it being designated as a frontage and some of the uses provide a unique service not found elsewhere in the town.

Figure 48 - 1-9 High Street, Cinderford

Figure 49 - 2-6 Dockham Road,Cinderford

Figure 50 - 1a, 1b and 3 Heywood Road, Cinderford

6.3.15 The next proposed frontage within the town centre is a pair of takeaways and a charity shop that are located off the Heywood Road junction with the High Street (Numbers 1a, 1b and 3 Heywood Road). This pair of takeaways are well related to the central core area and are interesting buildings as they are set back off the road and both small identical buildings of a character unlike any other of the buildings within the town centre. They are well suited to the uses that occupy them and contribute a positive frontage connecting the rest of the High Street

6. Retail frontages and town centre boundaries

and the central triangle area. Although only a small group of shops, they are still considered to be important town centre uses that should be afforded a frontage designation.

6.3.16 Number 1 Belle Vue Road and numbers 2+3 Woodside Street are currently a café, bakery and a locksmith. This unique corner building between Woodside Street and Belle Vue Road is a focal point on the road junction and also has an interesting mural on the wall of the building that represents part of Cinderford's mining heritage. This buildings marks the end of any town centre uses on either of these streets to the south but still relates well to the town centre as do the units on Dockham road which also could be considered suitable for a frontage designation in a revised proposals map.

Figure 51 - Mural on the Bakery, Cinderford

6.3.17 The final suggestion for Cinderford town centre is that of the frontage along Dockham Road including numbers 1-6 Berisford Court which lies part on Belle Vue Road. This parade of shops marks the far southern end of the town centre uses that could be identified on a frontage policy. The uses within this parade include a hair salon, café and restaurant, insurance broker and a cash exchange shop. This is a good mix of uses as seen on many of the streets in Cinderford which are located opposite the bus station and on route to the central triangle shopping area. One disadvantage of this frontage is its accessibility to pedestrians crossing the road. The junctions onto the roundabout here are usually busy and can get heavily congested at peak hours making it a dangerous place for pedestrians to cross.

Figure 52 - 1-6 Berisford Court, Cinderford

6. Retail frontages and town centre boundaries

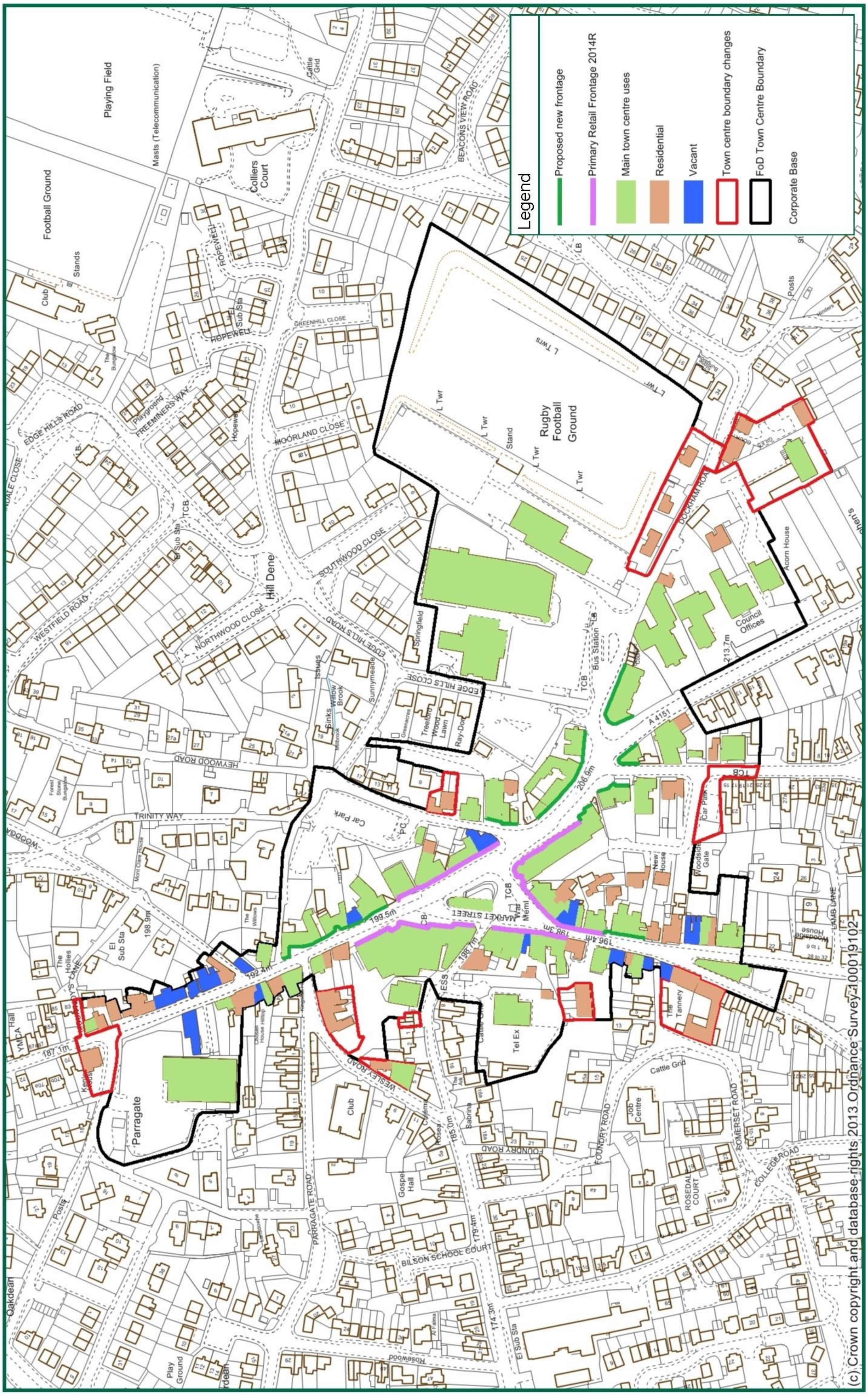


Figure 53 - Proposed town centre changes

6. Retail frontages and town centre boundaries

6.4 Coleford

Existing Primary Retail Frontage

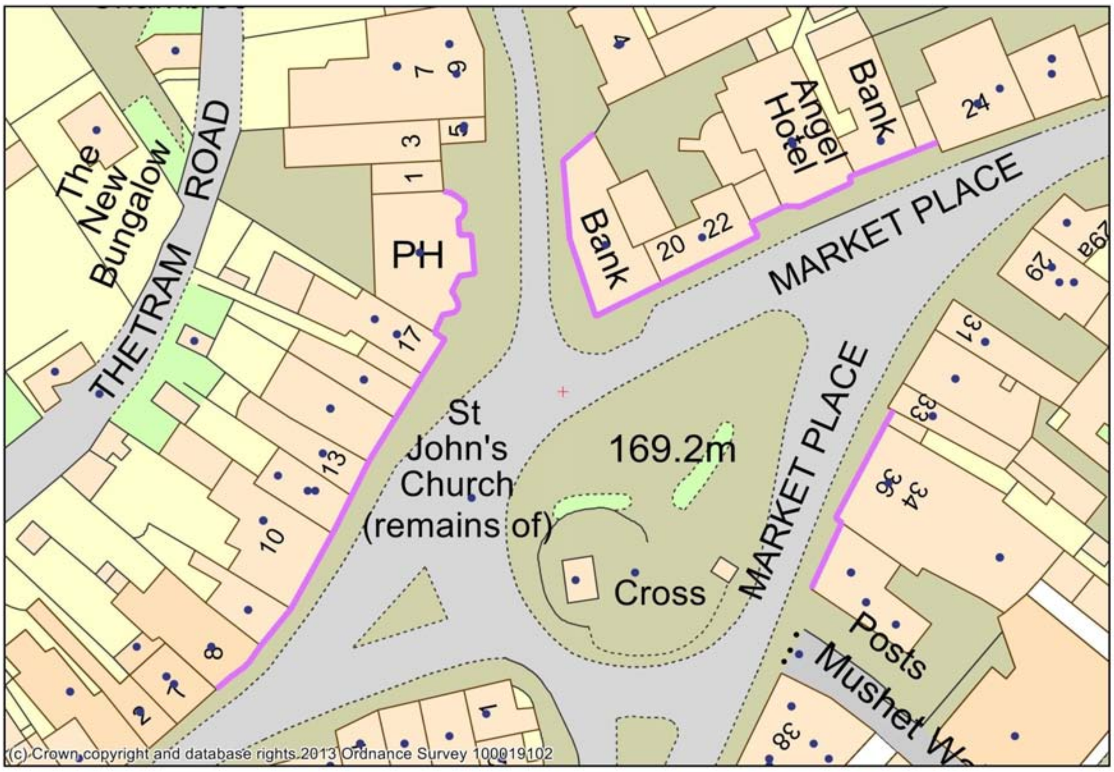


Figure 54 - Market Place Existing Primary Retail Frontage

6.4.1 Market Place is the central focus of the towns retailing and is predominantly where the retail frontages are located in Coleford. The central clocktower is a unique and distinguishing feature of the town that acts as a central public space to the town. The retail frontage in this central area of town covers most units surrounding the central Church remains. The units on these frontages are mostly retail units selling a mix of convenience and comparison goods. Uses here include public houses, charity shops, clothes shops, takeaways, bakery, DIY Shops, furniture shop, banks, newsagents, butchers and more. Apart from a few office uses such as solicitors offices and estate agents, most shops are retail traders.

6. Retail frontages and town centre boundaries

6.4.2 The Northern frontage to Market Place consists of:

Street Number	Use	Listed building?
19 Market Place	Lloyds TSB bank	Yes (Grade II)
20 Market Place	Scotts Shoes	Yes (Grade II)
Angel Hotel Market Place	Angel Hotel/Pub	Yes (Grade II)
23 market Place	Tapas Bar Restaurant	No
24-25 Market Place	Dean Estate Agents	No
27 Market place	The Barbers	No
28 Market Place	Milano Takeaway	No

Figure 55

Figure 56 - Market Place North

6.4.3 Market place north has a variety of uses from Takeaways to a shoe shop. It is a very well used frontage with a bus stop from the town centre situated outside the tapas bar restaurant. Three of the seven buildings on this street are Listed Buildings and they do add character to the town centre. In terms of pedestrian flow, people walking up Gloucester road from the town centre use this street and the traffic light crossings outside the Kings Head Pub to travel to the few shops/takeaways on Gloucester Road.

6.4.4 The Primary Retail Frontage currently includes the Lloyds bank upto and including the Tapas bar restaurant, but doesn't include the estate agents, barbers and takeaway on the corner of the street. The addition of these few units to the retail frontage could be an addition to consider as part of the allocations development plan documents map revisions.

6. Retail frontages and town centre boundaries

6.4.5 Market Place West is the most used frontage surrounding the clock tower. This side of the town centre also has a busy bus stop and good pedestrian access to the rest of town centre and also up St. John's street. A variety of uses can be found along this street that includes takeaways, a public house, jewellery shop, charity shop, DIY shop, Healthfood shop, Fruit and Vegetables shop and a newsagents. This is the only frontage on Market Place without a listed buildings.

6.4.6 The shops themselves are small in size and often have residential flats above. The existing primary retail frontage covers all the associated retail units and there isn't any further units to include in any amendments to this designated retail frontage.

Figure 57 - Market Place West

6.4.7 The final existing retail frontage on Market Place is the street to the East which only has a small part identified as primary retail frontage. The frontage covers only three units (Union House and 33- 36 Market place) on this street which includes a gift shop, furniture shops and a butcher. Out of these three buildings two of them (33 and 34-36) are grade II Listed. Further along this street there are a mix of uses including a takeaway, public house, Offices, Barber Shop and an Estate Agency conveyancy. All of these uses could arguably be included in a retail frontage of sorts including the sandwich shop and chiropodist down Mushet Walk in the changes made in the Allocations plan document.


Figure 58 - Market Place West

6.4.8 Pyart court is the final designated retail frontage which lies on the outer edge of Coleford town centre. This complex consists of 27 small retail units of which some are occupied by a mix of different uses. These include a bakery, flower shop, pet shop, pharmacy, café, sweet shop, laundrette, hairdressers and more. The shopping court is supported by having its own private car park and is located adjacent to the large District council car park. Pyart court is within walking distance of the town centre and provides small unit space for small businesses.

6. Retail frontages and town centre boundaries

6.4.9 The existing retail frontage for Pyart Court currently runs along the South Western edge of the complex as identified on the Adopted Proposals Map. You could argue all frontages on the complex should be identified as a retail function although should not necessarily be a primary retail frontage. This complex could be looked at when reviewing frontages for the Allocations Plan as one for potential additions.

Figure 59 - Pyart Court

Identification of potential new retail frontage

6.4.10 Despite Coleford town centre having a fairly good identification of the retail frontages which need to be protected for retail use, there are areas in which changes could be made in any updated policy in the Allocations Plan. Some are minor additions to existing frontages with others suggesting new frontages altogether. Most of the suggestions relate to making the protection of the retail core of the town centre more robust. This means identifying areas as retail frontage that are not currently marked on the proposals map as being retail frontage.

Figure 60 - Market Place

6.4.11 The first area which should be considered for a retail frontage forms part of the ring of shops around the clock tower in the town centre. It is the only frontage around the clock tower that has no identified retail frontage on the proposals map. The units themselves consist of a bakery, sweet shop, charity shop, hair salon and public house. 1-3 Market Place are all Grade II listed buildings which add to the other listed buildings leading up the High Street on the same side of the road. These shops could be included in a retail frontage in order to protect the focus of a retail core around the clock tower.

6.4.12 If left without a retail frontage to help protect the shops at ground level, then there is the possibility that we will see some of these converted for residential purposes. We have seen an increasing occurrence of this in the forest town centres which is detracting from their primary function as a retail centre.

6. Retail frontages and town centre boundaries

6.4.13 The High Street currently has identified retail frontage on the Eastern side of the street whereas no frontage has been afforded to the other side of the street. The western side of the High Street is much different to the retail frontage opposite in terms of types of uses that are there. These include car sales and repair garage, cinema, bike shop, solicitor's office, cake shop, opticians and a day nursery centre. Number 2-10 High Street are all grade II listed buildings dating from the 18th and 19th Century whereas the retail frontage on the High Street has no Listed Buildings.

Figure 61 - Western side of the High Street

Figure 62 - St Johns Street

6.4.14 St. John's Street Coleford is located north of the town centre Market Place and is one of the key shopping streets leading off the central Clock tower public space. The street currently doesn't have a designated retail frontage identified on the proposals map, however it certainly should be recognised so in order to protect the retail uses at ground floor level that are currently located there. The street boasts a real mix of retail and business uses that include takeaways, cafes, hair salons, newsagents, butcher, charity shop, computer shop, clothes shop, florist and more.

6.4.15 The street recently had a public space improvement scheme to improve the pavement and road space for pedestrian and vehicular use. It is very well used by pedestrians and also vehicles travelling one way up to the Bank Street junction. It's structure and form is unique in Coleford town centre and is an important retailing frontage in the town centre. This warrants the street being afforded a retail frontage on both side in order to preserve the shopping nature of the street.

6. Retail frontages and town centre boundaries

Figure 63 - St Johns Street

6. Retail frontages and town centre boundaries

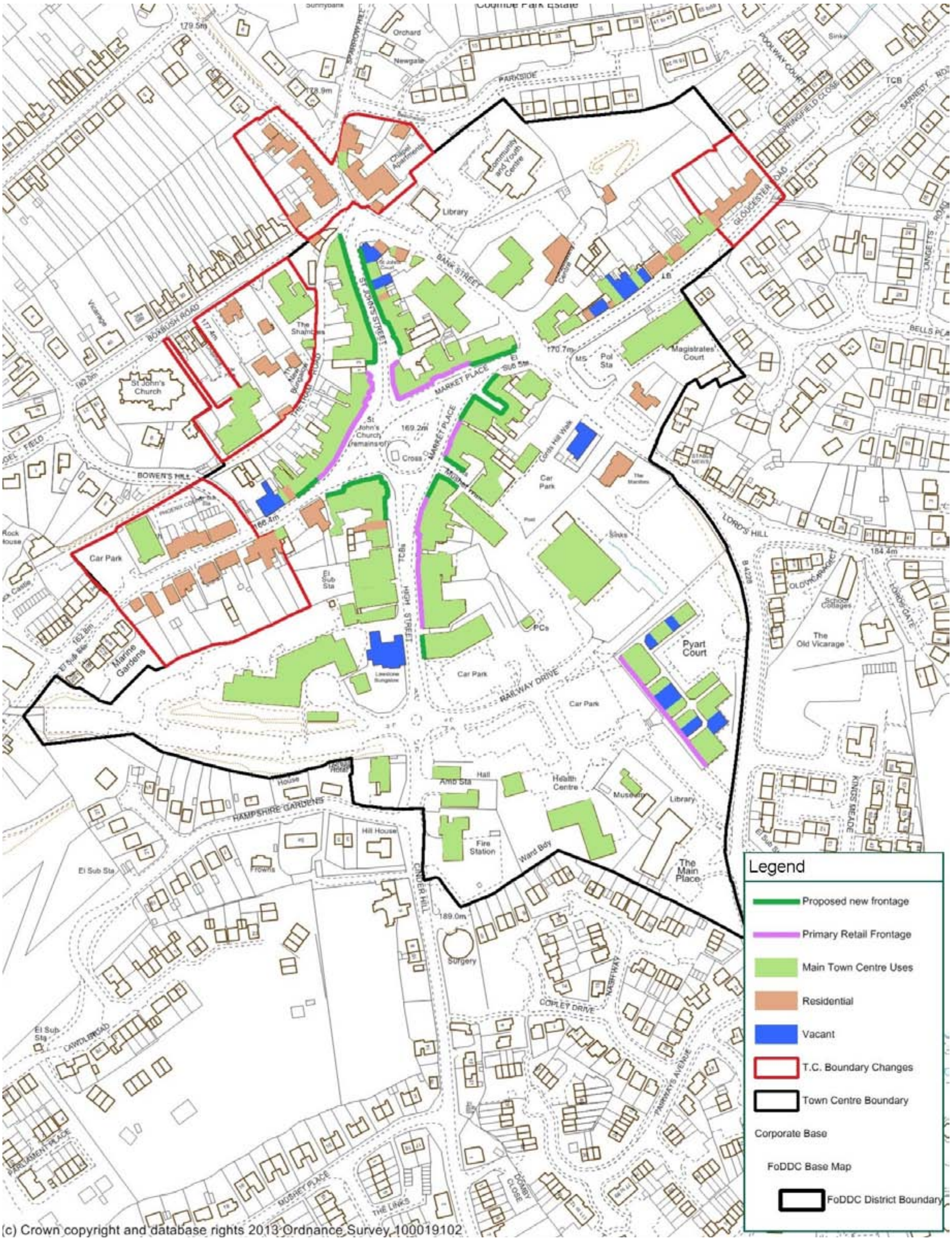


Figure 64 - Proposed Coleford town centre changes

6. Retail frontages and town centre boundaries

6.5 Lydney

Existing Primary Retail Frontage

6.5.1 The primary retail shopping frontage in Lydney all falls on one of the streets to the North of the town centre. Along Newerne Street there is a great mix of uses including banks, takeaways, newsagents, and much more. There is also a medium sized supermarket just off the Main Street and car sales garage which have concentrated most of the towns retailing to the North of the town centre. Lydney does also have another supermarket of a similar size to the South of the town centre located just off the High Street near the B4231 junction.

6.5.2 Out of all the town centres in the Forest of Dean District Lydney is the most spread out of all. There is more of a focus to the north nowadays, but there still remain pockets of shops all along Newerne Street, Hill Street and the High Street. Some of these pockets could warrant being protected by a retail frontage, as once again as times are changing these pockets are slowly being eroded and lost to residential uses or non-retail functions.

Figure 65 - Newerne Street, Lydney

6.5.3 The existing primary retail frontage falls on Newerne Street to the North of the town centre. This frontage acts as the main retailing frontage for the town and includes a wide range of uses including banks, bakeries, hair dressers, estate agents, pet shop, charity shops, clothes shops, takeaways, cafés and more.

6.5.4 On the opposite side of the street, the primary retail frontage includes the small group of shops and services that includes a large shoe shop, gym, estate agents and a dental practice. Although there are few shops on this side there is a pedestrian crossing which allows easy access to both sides of the street. The southern side of Newerne street alongside the garage and small group of shops could be an

6. Retail frontages and town centre boundaries

area to improve the shop frontage and street scene in order to create a more pleasant shopping environment and town centre focus without being diluted by other not so common town centre uses such as car sales garages and car wash businesses.

Figure 66 - Newerne Street, South Side

6.5.5 Following on from this on the same side of Newerne Street the primary retail frontage continues at the two units at Waterside court. This frontage currently only covers the one unit as the other was used for storage. Both these units should be identified as retail frontage as they both are now used as separate shop units for different businesses. On from Waterside court numbers 18 – 38 are all identified as retail frontage. Uses include cafes, hairdressers, sandwich shops, charity shops, betting shops, furniture store and more.

Figure 67 - Newerne Street, South SIde

6. Retail frontages and town centre boundaries

Figure 68 - Northern side of Newerne Street

6.5.6 The final existing primary retail frontage in Lydney is the Northern side of Newerne Street. This includes currently numbers 23 – 31 and uses such as an insurance broker, party shop, butchers, gift shop and Nail and Beauty parlour. There is argument here to extend this frontage to include the small group of shops upto the B4234 junction, which continues on from the existing retail frontage with no such break in the street scene apart from being set back from the road edge.

Identification of potential new retail frontage

6.5.7 As mentioned above the two units at Waterside Court are currently half identified as primary retail frontage. For common sense reasons it is only appropriate that both units are identified as a retail frontage in any new policy or revision of the proposals map.

6.5.8 The eastern end of Newerne Street includes a variety of uses and also a small retail centre known as Regents Walk which extends to units behind the main street known as Regents Court. These two shopping areas mainly comprise of small shop units of a wide ranging description from café, hairdressers to antiques and reclamation and therefore should be identified as a retail frontage.

Figure 69 - Regents Walk, Newerne Street

6. Retail frontages and town centre boundaries

6.5.9 On the opposite side of the street to Regents Walk there is a small group of shops that are set back from the main road with a small area of public space fronting the highway. Uses here include a building society, charity shops, hair salons, clothes shop and an accountant's office. These units also warrant having a retail frontage for the protection of their uses at ground floor level.

Figure 70 - Newerne Street, Lydney

6.5.10 Forest Parade lies off Hill Street on the junction with the B4234. The building itself has a permanent overhanging roof covering the walkway in front of the parade of the shops that front onto Hill Street. The shops that head off down the B4234 are all takeaway or restaurant businesses with residential flats on the first floor, whereas there is more of a mix of shops fronting Hill Street. The mix on this side of the parade currently includes a florist, hair salon, takeaway and a cash exchange.

Figure 71 - Forest Parade

6. Retail frontages and town centre boundaries

6.5.11 This parade is a well-used frontage that almost marks the end of the town centre focus and the start of the southern part of the town centre towards the town hall. Forest Parade is an important group of small shops that provide the town with a good variety of takeaways as well as some other uses.

Figure 72 - Forest Parade, Hill Street

6.5.12 It's functionality as a building with retail units on the ground floor with residential flats above is a good example how our town centres should be functioning. This group of shops should therefore be recognised as a retail frontage that is important to the town centre and almost reflects how retail frontages are intended to work. This is important to the vitality of town centres and providing people with sustainable places to live, that have access to a variety of uses and services.

Figure 73 - Gosscox Court, Hill Street

6.5.13 Adjacent to Forest Parade are a group of shops that centre around Gosscox Court fronting Hill Street. There are three shops on this frontage that currently include an opticians, chinese takeaway and a charity shop. This frontage inline with the frontage of Forest Parade, mark the end of the recognised town centre retail shopping area. Therefore, this group of shops should also be recognised as a retail frontage and recognised as part of the retail core.

6. Retail frontages and town centre boundaries

6.5.14 The final possible new coherent retail frontage in Lydney town centre is that of the row of shops known as the Cavendish Building. This building is located next to the town library and is set back off the edge of the highway (Hill Street). The building is split into five small shop units on the ground floor level and also has a number of offices above where there are a few financial and professional services operating. The shops on the ground floor currently include a hair salon, jewellers, takeaway, insurance brokers and a dry cleaners/laundry service. All these uses are classed as town centre uses and operate as part of the town centres main shopping area. This building should also be afforded a retail frontage to protect at least the ground floor level of retail units, but being flexible to allow a variety of uses on the 1st floor.

Figure 74 - Cavendish Building, Hill Street

6.5.15 To the south of the town centre towards the market hall, there are outcrops of two and three unit groups, however not so much that a coherent retail frontage could be identified. Many of the shop units towards the market hall that used to be on the High Street have been converted to a residential use and as a result have broken up any previous continuous retail frontage of the past.

Figure 75 - 47-55 High Street

6. Retail frontages and town centre boundaries

6.5.16 There are a variety of different uses this side of Lydney and some of which are the sole type of shop in the town centre. These include a fishing shop, pet store, vetinary centre, lawnmower repairs and sales and a budget tool sales store. These shops alone attract people to this side of town for their specific products but the variety of other small shops that includes estate agents, hair salons, laundrettes etc. also contribute to people shopping in this side of town.

Figure 76 - 5-17 High Street, Lydney

6.5.17 Unfortunately due to the migration of most of the town centre uses to the North of Newerne Street this means that the small shops in the High Street have suffered to a certain extent and is why we are seeing some converted for residential use. It is not appropriate to identify this area for a retail frontage as the frontage is too dispersed and interrupted by residential uses to form a strong backing for a retail frontage protection policy. Although it is used for retailing these individual shops will survive on their own merits and the high Street will adapt to changes. Restricting the change of use of any ground floor retail uses in this area could end up seeing high vacancy rates and in the long term degradation of shop frontages and inherently the buildings themselves if no use fills them.

Figure 77 - High Street, Lydney

6. Retail frontages and town centre boundaries

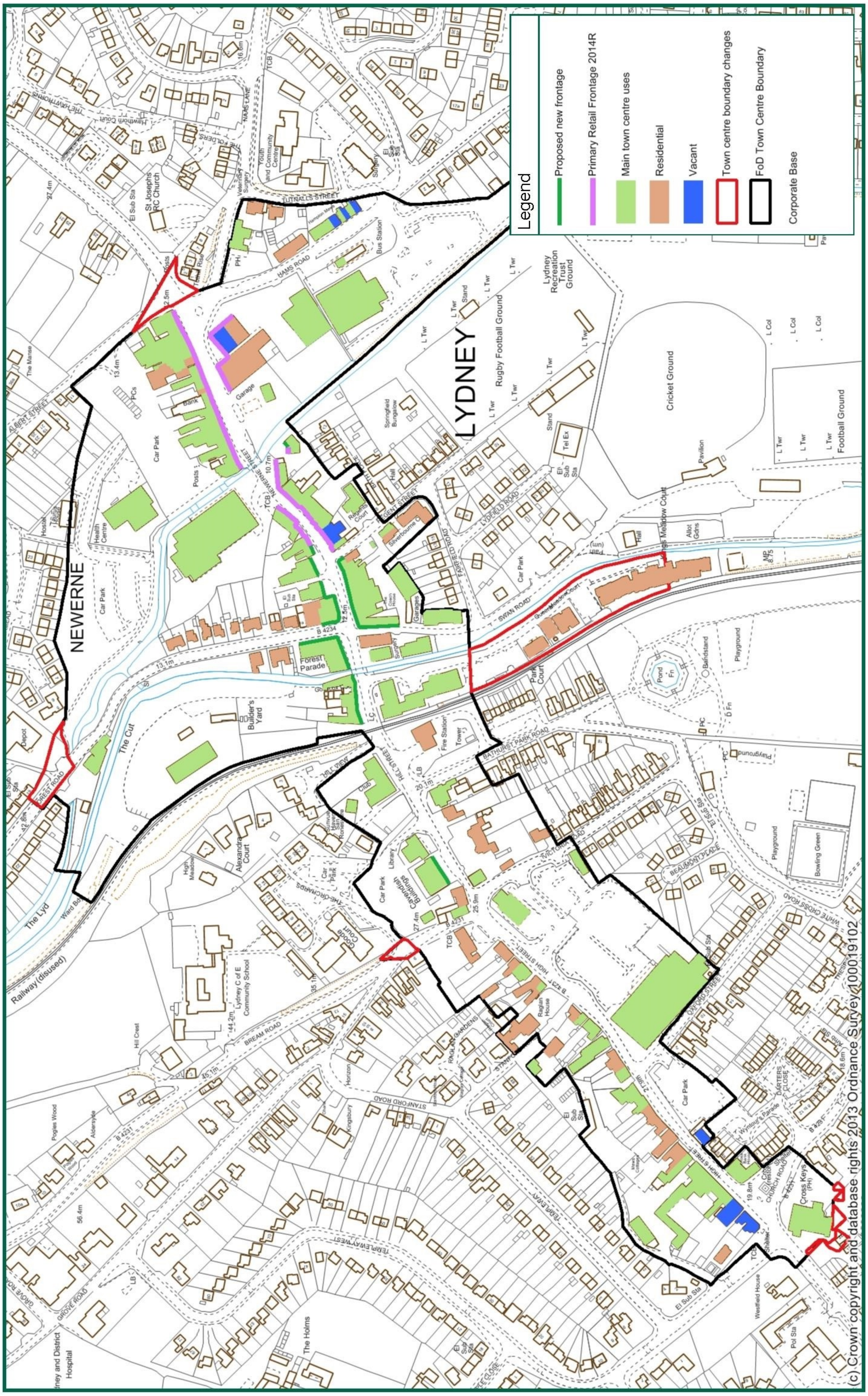


Figure 78 - Lydney town centre suggested changes

6. Retail frontages and town centre boundaries

6.6 Newent

<u>Existing Primary Retail Frontage</u>

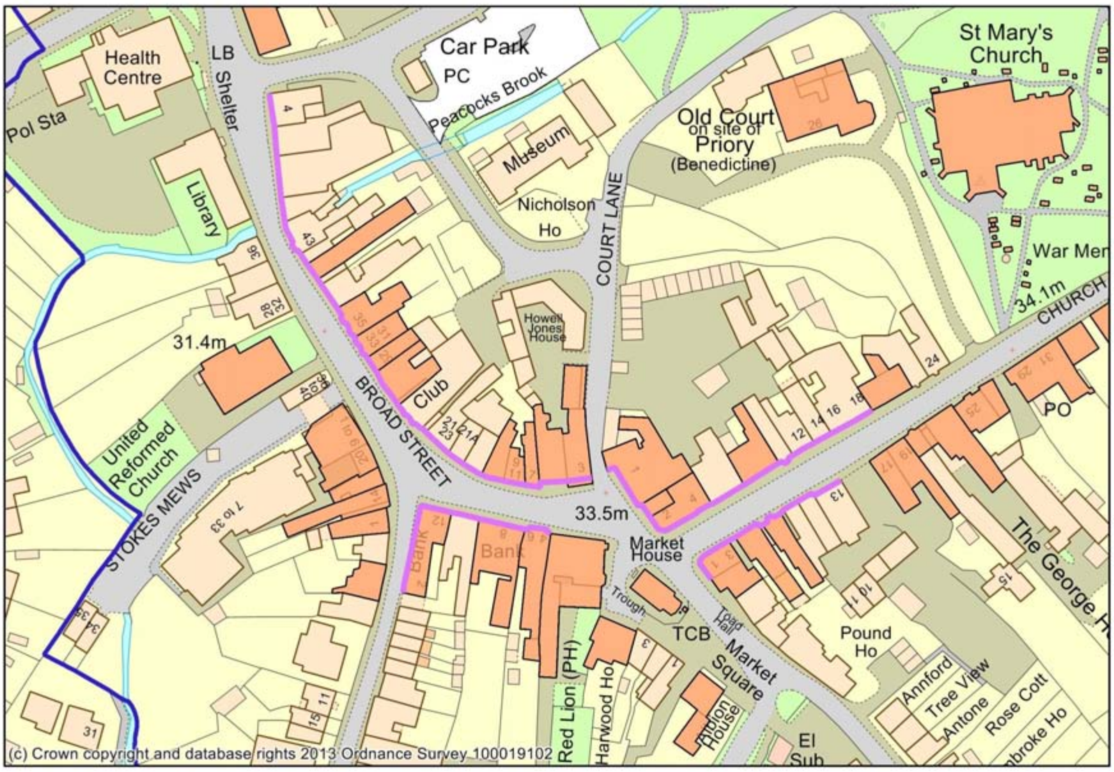


Figure 79 - Existing Primary Retail Frontage in Newent town centre

6.6.1 The map above (Figure 79) shows the existing primary retail shopping frontage (Pink line) in Newent town centre. The focus of the town centre stems from the historically significant Market House which is an iconic building within the Forest of Dean district. The building was built in the late 16th early 17th Century and is Grade II listed as well as being a scheduled ancient monument. Most of Newent town centre has retained is market town character and appearance and the majority of the buildings within the town centre are in fact listed in their own right.

Market House, Newent

6. Retail frontages and town centre boundaries

6.6.2 The existing primary retail frontages are mainly on Broad Street extending to part the way down Church Street. Newent has a variety of different retail uses and has a high proportion of small local businesses and independent shops. The town is a thriving hub for shopping in the North of the district which supports much of the surrounding rural area.

Figure 80 - Broad Street, Newent

6.6.3 The north eastern side of Broad Street is the main identified shopping frontage in the town. It has a wide range of uses which include, a bakery, fruit and veg shop, charity shops, takeaways, estate agents, butchers shop and more. This frontage has out of 21 buildings a total of 10 listed buildings which help to maintain a traditional original shop frontage which is unique in the district. The buildings are a mix of styles from red brick to traditional timber frame black and white structures.

6.6.4 Numbers 2 – 12 are the South side of Broad Street and the uses include two banks, a bakery, an optometrist, public house and a gift shop. All buildings on this primary shopping frontage are red brick two/three storey buildings of which four of the five buildings are Grade II Listed. These uses lie in the most central point of the town centre in the identified core retailing area surrounding Market House and up Broad Street. This frontage currently provides the only key financial services for the town.

Figure 81 - South side of Broad Street

6. Retail frontages and town centre boundaries

ID	Eng_Her_ID	Name	Short_Desc	Grade	List_Date
314	125615	No 8 (formerly listed as Lloyds Bank)	Bank; early C18	II	02/10/1954
315	125616	No 12 (building between corner of Broad Street and number 6)	Former house, now bank; late C18 or early C19	II	18/10/1985
313	125614	Nos 4 & 6 (formerly listed as Shop premises adjoining Red Lion Hotel to west)	Former house and shop, now shop; mid to late C18	II	02/10/1954
312	125613	No 2 (Red Lion Hotel)	Former Inn, now Public House; early and mid C19	II	02/10/1954

Figure 82 - Listed buildings South side of Broad Street

Figure 83 - 2-4 Church Street opposite the Market House (Gooch Sports), Newent

6.6.5 The next existing primary retail frontage on from Broad street continues on the final part of the northern side of Broad Street around the corner and down the northern side of Church Street. This frontage covers numbers 1 Broad Street to numbers 2 – 18 Church Street. Once again this frontage has a number of listed buildings and one which is especially iconic as it reflects the style of the Market House on the opposite side of the street and this property is number 2 – 4 Church Street (Currently Gooch Sports).

6.6.6 Number 2 – 4 Church Street acts as an iconic corner street building that then leads us up Church Street itself. Church Street is named so after St. Mary's Church which is located to the North Eastern end of Church Street and currently just within the town centre boundary. Although the northern side of Church Street is very much traditional in style of shop frontage and windows there are only a few of the buildings on this retail frontage that are actually listed buildings.

6. Retail frontages and town centre boundaries

Figure 84 - Church Street (Northern Side), Newent

6.6.7 Church street relates very well to the town centre retailing core and is well connected to the other shopping frontages on Broad street. There are pedestrian pavements on both sides of the street that allow ease of movement through the town which does have vehicular access to all parts.

6.6.8 The northern side of Church Street has a range of professional services and independent shops. These currently include solicitor's offices, florists, carpet shop, a software company, newsagents, beauty salon, café, picture framing shop and more. This wide mix of services means that there is something to attract everyone to this part of the town centre for their shopping and or professional advice or service.

6.6.9 A very unique feature of Church Street that is rarely seen in the Forest of Dean district is the access from Church Street through the frontage out to an area behind Church Street formerly known as 'The Shambles Museum'. This area used to represent a Victorian life museum filled with mock Victorian shops and traders. Nowadays this area still has a retail focus with numerous small businesses operating throughout the year from small units. Many of which fall into the category of craft or gift shops. There is also a café, hairdressers and a tattoo studio.

Figure 85 - Alleyway access to 'The Shambles Retail Village', Church Street

6.6.10 The retail village as mentioned above mainly consists of very small shop units that can offer small businesses a good retail space in a thriving town. The unusual but very interesting environment makes the units very attractive to small businesses that are trying to set up in a busy town like Newent. The types of shops we see in this area vary from cafes to craft shops and even a tattoo parlour. It's unusual environment and range of interesting independent shops makes it an attractive place for visitors and residents of the town to shop.

6. Retail frontages and town centre boundaries

6.6.11 The final existing primary retail frontage in Newent is the Southern side of Church Street extending from number 1 – 13. The uses on this side of the street include takeaways/restaurants, offices, a small public house, pet shop and a polish food store. Out of these seven properties, three of them are Grade II listed buildings. This street although has very few different uses, provides facilities and services not found elsewhere in the town. There is the only pet shop in town and also the only polish food shop.

The Shambles Retail Village

Figure 87 - Southern side of Church Street

6.6.12 The existing primary retail frontages as described above are all worthy of staying as a designated frontage that is important to the town centres retailing. Many of these frontages however have the opportunity to be expanded and also the opportunity to create new frontages to reflect the extent of the town centre retailing uses. The following section shall make recommendations /suggestions as to the premises that could warrant being included in a frontage protection policy in Newent town centre.

Identification of potential new retail frontage

6.6.13 Despite Newent being a thriving town for shopping and tourism, the existing retail frontage identified on the adopted proposals map perhaps doesn't identify all the areas that perhaps should be but certainly has covered most of the coherent frontages. Newent also has potential to better the current town centre retail offer by expansion of retail frontages and creation of new retail units in areas to be specified in the emerging Allocations Plan.

6. Retail frontages and town centre boundaries

6.6.14 The first suggestion is an extension to the frontage on the South side of Broad Street. This will extend the existing primary retail frontage to include number 2 Broad Street which is currently a Public House. The Red Lion fronts out onto Broad Street and is part of the active frontage alongside the banks and bakery. The pub itself is a grade II listed building alongside buildings of the same listing status and acts as a central public building for entertainment, food and drink.

Figure 88 - Red Lion, Broad Street

6.6.15 Church Street currently has two strong retail frontages on either side of the street extending down towards St. Mary's Church. Behind number 13 Church Street which is a Chinese takeaway currently, is an area known as Cheapside. This area is accessed via a small side road which serves a small car parking area for the residential properties and businesses in the close vicinity. Cheapside also has a few small business units that are currently occupied by a takeaway, café and also a small music/record shop.

Figure 89 - Cheapside, Newent

6.6.16 The other frontage on Church Street which has the potential to extend the existing frontage policy is number 20-24 Church Street just before you get to the graveyard of St Mary's Church. These buildings are currently in use as a picture framing business, solicitors office and a book shop. Number 20 Church Street is a Grade II listed building and was the previous entrance to what was known as The Shambles museum of Victorian life.

6.6.17 The final suggestion for Newent relate not to a frontage to be identified but with regards to the potential for Newent to develop more shopping opportunities in the town centre. The area to the rear of Church Street known as the Shambles retail village could be in theory expanded and more of a retail frontage created to the rear of Church Street, over Court Lane and around to the district council car park.

6. Retail frontages and town centre boundaries

6.6.18 The existing retail uses in the shambles and the area being redeveloped adjacent, along with the building known as Howell Jones House already have retail elements with potential to create more. This could also extend along the access road between Court Lane and the Council car park on the back of the properties that front the North side of Broad Street.

Figure 90 - Howell Jones Building, Court Lane

6.6.19 There is currently available land along this lane where a small group of retail units similar to those within Howell Jones House could be developed. The backs of the properties fronting Broad Street could be improved significantly as this is the first thing visitors who park in the council car park see when walking into the town centre. There is a good opportunity for a new frontage to be created here which would offer more shopping choice in the town centre and also improve the appearance of the environment in this area.

Figure 91 - Small Vacant plot in front of Howell Jones Building

Figure 92 - Potential for new frontage on backs of Broad Street properties

6.6.20 These suggestions could be incorporated into a policy area identified on the proposals map in the Allocations Plan Documents proposals. The area could be highlighted as an area for potential expansion of an active frontage which could include a mix of uses but predominantly of a retail town centre use. The policy could reflect the need to improve the appearance of the backs of the properties that are visible from the council car park and on the approach to the town centre.

6. Retail frontages and town centre boundaries

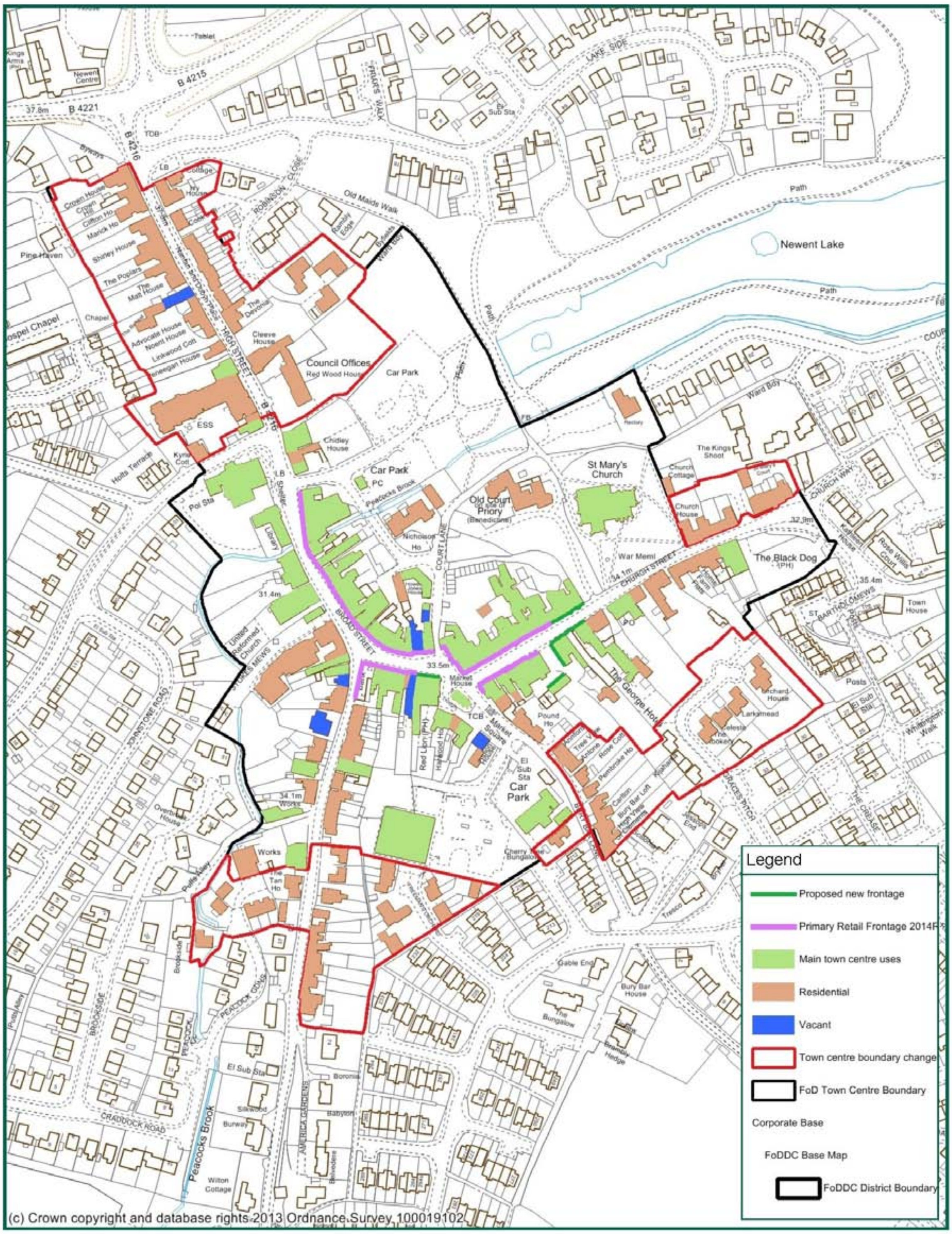


Figure 93 - Newent town centre suggested changes

7 Potential town centre environmental enhancement

7.0.1 This section shall identify some potential town centre environmental enhancements for the future that could be brought forward through different schemes and through section 106/CIL funding. Suggestions include areas identified for possible soft landscaping, areas of poor orientation due to signage, potential areas for a market and areas where there is too much signage that in turn clutters the street scene and town centre environment.

7.0.2 In February 1999 the Forest of Dean District Council commissioned Roger Evans Associates to undertake an Environmental Audit and Urban Design Appraisal for the four forest towns as part of the Forest of Dean Town Centre Health Checks. The report looks at the setting of the town centre and the historic development that has occurred, it identifies the key urban design aspects of each town including landmarks, views and important frontages. It also identifies key design areas for potential future environmental enhancements. Finally the environmental audit element to the report helps to identify areas for environmental improvements strategies to be developed.

7.0.3 Leading on from this report an Environmental Enhancement Feasibility Study was carried out by Roger Evans Associates for Newent town centre. This report looked at a number of projects over a number of phases to calculated projected project costs to deliver the town centre improvements. The feasibility study projects focused on the creation of a more dynamic pedestrian experience by creating new hard landscaping, removing signage clutter, minimise street furnishing and retain sections of kerb. To complement this a new 20mph zone was created for the town centre.

7.0.4 Following this an options report draft was written by Atkins who were commissioned by Gloucestershire County Council to further develop design and implementation estimates for the town centre project for resurfacing footways and sections of the town centre. Since then a number of these town centre improvements have been carried out and future phases are still planned subject to raising the appropriate funding for the schemes.

7.0.5 A similar approach has been adopted for Cinderford following the redevelopment of the triangle, further environmental enhancements to Cinderford town centre were suggested in the Feasibility Study report produced by Halcrow in July 2007. This report outlines a number of phased improvements that could be made to improve the environmental qualities of the town centre along with a works estimate and implementation plan. Unfortunately, the implementation of these proposed environmental improvements particularly to the pedestrianisation of the areas around the triangle has been stalled due to funding for the scheme. This report clearly outlines potential future changes that could occur to the town centre and therefore will stand in place if funding becomes available in the future.

7. Potential town centre environmental enhancement

7.0.6 The following sections of this report will look at potential environmental enhancements that could be made to the remaining two towns in the Forest of Dean District which includes Coleford and Lydney. The supporting reports for Newent and Cinderford town centres as discussed above, means that suggested improvements do not require any additions or further discussion in this report.

7. Potential town centre environmental enhancement

7.1 Coleford town centre improvement

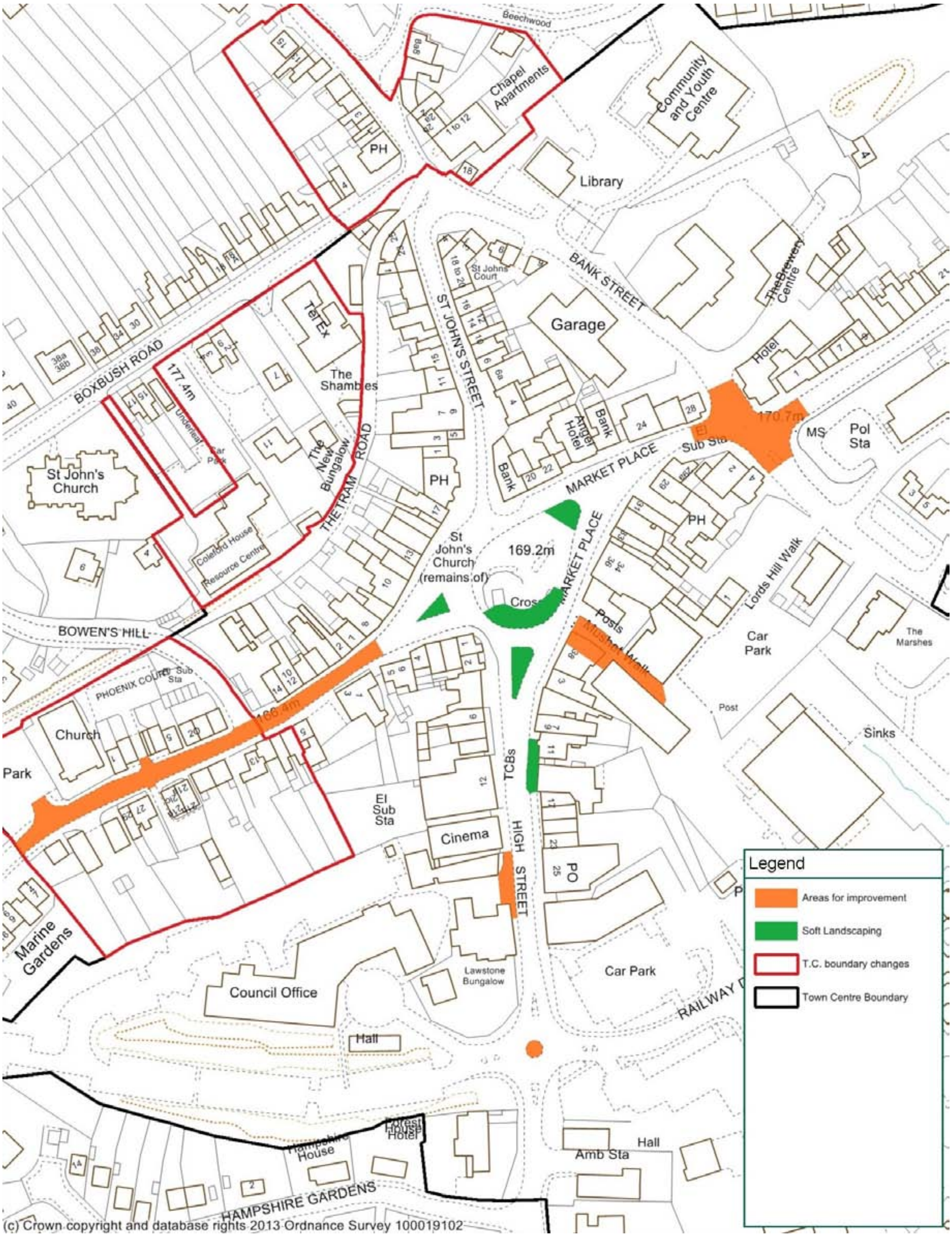


Figure 94 - Coleford potential areas for environmental enhancement

7. Potential town centre environmental enhancement

7.1.1 The above map highlights some of the suggested areas that could benefit from seeing some sort of environmental enhancement. These areas for Coleford are split into areas for environmental improvement and potential areas that could accommodate soft landscaping. The town centre boundary line (red line) shown on this map is to represent the proposed changes to the existing town centre boundary and how they relate to any potential enhancements.

Areas for improvement

7.1.2 The first area suggested for environmental improvements is from the car park on Newland Street down into the town centre. Improvements could include work on the pedestrian footways and also the road surface of the street which is currently in a poor state of repair after experiencing numerous utilities works excavations and patching cover up. The repeated works on this street has lead to significant patching of the road surface which is now uneven and in some places lead to the start of pot holes forming.

Figure 95 - Poor road surfaces on Newland Street

Figure 96 - Bank Street Cross Roads

7.1.3 The Bank Street traffic lights and cross roads is an area of the town centre that gives an uncertain sense of orientation when entering the town for the first time especially to new visitors. Signage here has a traffic focus that does not welcome visitors or direct to parts of the town centre well. Currently the traffic light system operates a number of pedestrian crossings that even though allows pedestrian movement across this junction is not pedestrian friendly. Improvements could be made to the pedestrian crossings and surfaces in order to encourage walking into town from Gloucester Road, Bank Street and down from Lords Hill.

7.1.4 Further to the cross roads there are also other pedestrian routes within the town centre that could be improved which arguably are more frequently used. The first of these areas is the pedestrian walk through from Market Place to the

7. Potential town centre environmental enhancement

Co-operative supermarket formerly known as Mushet Walk. Although the entrance to Mushet Walk is clearly marked by an iron arch and gateway that does add interest to the town centre environment the walkway could be enhanced.

7.1.5 An area that links the District council offices to the High Street past Lawnstone House is one that could have potential to be improved. Currently the area is dominated by traffic bollards with two beds that appear to have been set out in the past for planting in the town centre. Apart from established hedging to the front entrance of Lawnstone House other areas for planting appear unused and of no merit to this approach to the town centre.

Figure 97 - Lawnstone House frontage

7.1.6 The final area in Coleford that could be an area for improvement through future financial contributions from developments that come forward in Coleford, is the roundabout off Railway Drive. This roundabout serves four access points, to the district council offices, the town centre car park on Railway Drive, the High Street and Cinder Hill. The roundabout not only acts as a safer traffic access to all four roads but as a traffic speed reduction measure. Despite its primary function the roundabout itself could be improved in order to enhance the environment here.

Figure 98 - Roundabout off Railway Drive

7.1.7 Grass verges and planted trees surround the different uses off Railway Drive and the car park, whereas the roundabout is very plain, highway focused on directing traffic. The excessive signage here is damaged and overbearing. A suitable planting scheme could accommodate the necessary highways signage required at the same time as enhancing the environmental qualities of this end of the town centre.

Areas for potential soft landscaping

7.1.8 There are a few small areas that could be suitable for environmental enhancement via permanent or temporary soft landscaping schemes in the town centre of Coleford, most of which relate to the very centre core of the town centre surrounding Market Place and the clock tower. Some of these areas relate specifically

7. Potential town centre environmental enhancement

to paved pedestrian open spaces that are a bit plain and could benefit from additional planting, whilst others refer to pedestrian crossing points associated with the highways junction points.

7.1.9 These differing areas may be suitable for a mix of landscaping types to include more permanent features more so on the central clock tower area and temporary planting units perhaps located in the areas in association with the highways. All of which would contributed positively to the public spaces and overall environmental qualities of Coleford town centre.

7.1.10 The pedestrian area in front of the post office is a wider part of the footway that is often used by cars or delivery vans to illegally park on. This not only poses a threat to pedestrians when vehicles are entering and exiting the pavement but also can sometimes result in backed up traffic in the town centre due to the width of the High Street. To help prevent this and improve the environmental qualities of the High Street, this area would benefit from some sort of planting possibly through temporary planters not dissimilar to what has been suggested above for the small highway junction points.

Figure 99 - Area outside Coleford Post Office

Figure 100 - Area outside Coleford Post Office

7. Potential town centre environmental enhancement

7.2 Lydney town centre improvement

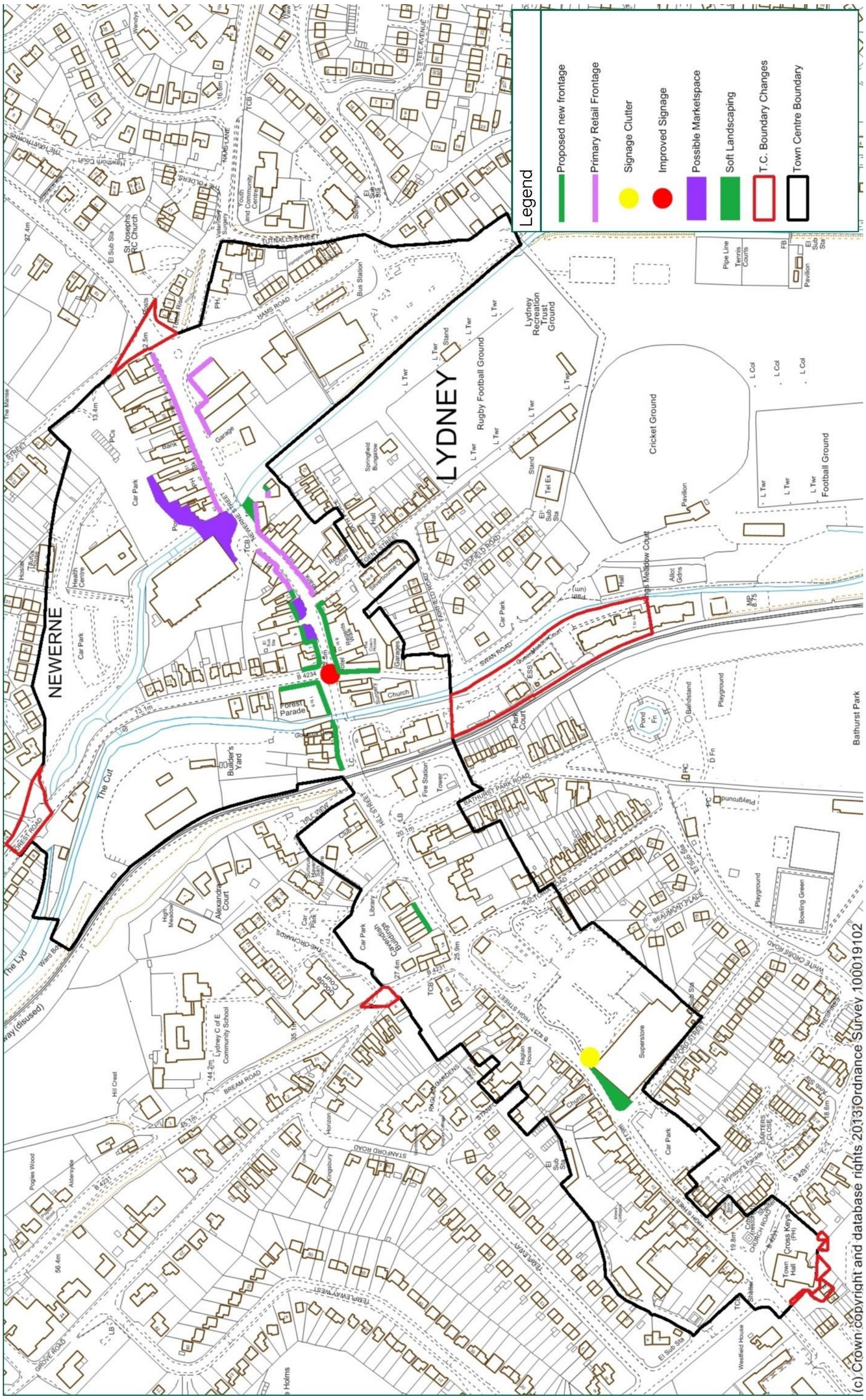


Figure 101 - Potential town centre environmental enhancements

7. Potential town centre environmental enhancement

Soft Landscaping

7.2.1 The following suggestions are in relation to soft landscaping. This implies potential for permanent or temporary landscaping including permanent flower beds and features or temporary measures such as moveable planters.

7.2.2 The first area identified for environmental enhancement via a soft landscaping approach is the area adjacent to the High street next to the Tesco Store. This area seems to have been a forgotten area when the Tesco building was built and left as a plain brick pedestrian surface. The potential area for soft landscaping in terms of size measures roughly 130m^2. This area could be an area for significant environmental improvement. This could include a raised bed for flowers, small bushes and even small trees. This would help break up the harsh plain frontage of the Tesco store whilst contributing to make walking along the High Street past the supermarket a more pleasant experience.

Figure 102 - Area Adjacent to High Street and Tesco

7.2.3 The well established retail frontage along Newerne Street both sides of the road provides shoppers with a wide range of choice of goods. The street has few open public spaces but mostly narrow pedestrian pavements either side of the street. On the southern side of Newerne Street the public space opens up into a small pedestrianised area outside Bridge House. The frontage of bridge house contains a variety of uses including a hairdressers, café, sandwich bar and an estate agents. This is a well used frontage that would benefit from an improvement in the area of public space that fronts Bridge House.

7.2.4 Currently this area is tarmaced with a small planted bush to the centre. The divide between the pedestrian pavement and the area directly infront of the shop frontage is defined by line of iron bollards which in the past appear to have had railings between them. The area unfortunately appears to be used frequently as a place to display highways works signs and detracts from the shop frontage itself. A range of options could be suitable for this location from permanent planting to temporary moveable planters. However, the suggestion merely identifies this area as an area which could be improved.

7. Potential town centre environmental enhancement

Figure 103 - Area in front of Bridge House, Newerne Street

Possible Marketplace

7.2.5 There are two areas in Lydney which could be suitable for a market with a number of stalls whether it be a farmers market or for all types of market traders during the week or at the weekends. Markets could be temporary features within the town on a weekly or monthly basis.

Figure 104 - Area infront of 17-19 Newern Street

7.2.6 The first suggested space for a market is the area directly in front of numbers 9, 17 and 19 Newerne Street. This frontage currently comprises of a number of uses which include a bank, charity shop, hair salon, estate agents and a clothes shop. The frontage is set back from Newerne street (approx 9 meters) which has created a small courtyard space that is currently just pedestrianised public space. The area does have an access road that is central to the courtyard and runs between number 9 and 17. Adjacent to Newerne street the pedestrian pavement continues past the small parade of shops which is separated from the small courtyard by a line of bollards.

7. Potential town centre environmental enhancement

7.2.7 Although this space is small and would mean some obstruction to the existing shops on the frontage, a layout for a small number of market traders on small stalls could be accommodated without great impact on the existing shops. It's location is good for a potential market place as it relates well to the existing primary retail shopping frontages on Newerne Street and is only a short walking distance from the central council car park.

Figure 105 - Area infront of number 9 Newerne Street

7.2.8 The second area that could have potential to hold a market during the week or at weekends is the area to the east of the Co-operative store on Newerne Street. The area around the stream bridge crossing to the car park and the informal public spaces surrounding the Co - Operative building could have potential to host a few small market stalls. This position will give the market trader high footfall which is key to market sales, with pedestrians using the bridge access from the central car park to get to the supermarket and also the rest of the town centre. Although the usable public space here is limited there is scope for small stall market traders to use this space and add some further attraction for the town centre.

Figure 106 - Area adjacent to the car park and brook

7. Potential town centre environmental enhancement

Figure 107 - Bridge access from car to town centre

Signage Clutter

7.2.9 Signage clutter is a problem for some of the forest towns and villages where the use of highways signage becomes over domineering and can affect the overall environmental quality of the town centre environment. In Lydney there is evidence of this in both permanent signage and also temporary works signage which can be left in place for significant periods of time.

Figure 108 - Signage clutter, Tesco, High Street

7.2.10 The main areas of signage clutter in Lydney firstly is the area around the Tesco store on the High Street. Signage here consists of a number of local business adverts displayed on the frontage of the supermarket building towards the corner of the building that is visible from the High Street as motorists drive past. Local businesses adverts are a bonus to local economies but they have their place. Large adverts can be detrimental to the environmental qualities of a town centre and the street scene.

7. Potential town centre environmental enhancement

7.2.11 The second area which is easily identified is the cross road junction at the Swan Hotel. Here there is numerous signs for businesses and also highways signs. This include the large highways signs directing traffic to the different towns and villages, the hanging sign from the Swan Hotel and also the use of 'A' boards by the small businesses on the Newerne Street Retail Frontage. Signage is important to small local businesses and helps to recognise their business to passers by whether they be pedestrians or motorists. As a result there is little than can be done to reduce the impact on street scene from the local business signage but, the highways signage could be improved significantly. The image to the right depicts how the highways sign is much more dominant in the street scene than any of the smaller business signs. It is obvious that the highways sign is actually bigger than it needs to be and if if were just the white pointed rectangle then much of the grey backing to the sign would be lost and it would be less imposing.

Figure 109 - Signage Clutter, The Swan Hotel, Newerne Street

8 Core Strategy Retail Policy Summary Table

Policy Number	Policy
CSP. 7	**Economy (strategic objective: develop the local economy including tourism)** Economic development will be promoted throughout the district in accordance with the spatial strategy and its allocations. This will encourage new and more diverse types of employment and supporting infrastructure to be established by making land and premises available. The location of new development must be justifiable in terms of the settlement hierarchy and policy CSP 4. Priority will be given to: • sustaining the development of key economic sectors or clusters, including knowledge based enterprises and tourism; • supporting the development of growth sectors providing office and business (B1) space in attractive locations; • providing the conditions and support for small and medium sized enterprises to become established and grow; • supporting further and higher education and skills training and the facilities to provide it; • supporting transport investment that will aid economic development and • ensuring that secure and safe environments result from any provision. Land presently used for employment will be expected to remain so, unless allocated for another purpose. In order to encourage this, a range of employment generating uses appropriate to each site will be considered favourably. Where a site is underused and unsuitable (by way of environment or location) for any employment generating use, (including service based uses) then a mixed use may be appropriate (eg employment and housing) and failing that an alternative non employment use.

8. Core Strategy Retail Policy Summary Table

CSP. 10	The Core strategy will bring about major change in Cinderford, to establish a more sustainable and economically diverse town using a new mixed development as a focal point for change which will be complemented by improvements in the town centre and other areas. It will: • Provide for about 1050 dwellings over the period to 2026; and a total of 60% to be developed on previously developed land. On eligible sites (over 10 dwellings/ 0.3ha, a 40% share of affordable housing will be sought). • Enable about 26ha of employment generation uses to be developed, including sites for a college, recreation/tourism/leisure, a biomass plant, office (B1) accommodation, and other uses centred around a new Northern Quarter mixed development. • Support the continued redevelopment of the town centre, to bring improved facilities, including retail outlets, with up to about an additional 2600m2 convenience and 2300 m2 comparison floorspace, public space and cultural facilities. • Enable the re modelling of parts of the centre to improve its attractiveness and ease of circulation; • Protect the retail core from other uses. • Ensure improvements in the urban fabric throughout the town. • Improve educational and training facilities especially for the post 16 age group. • Enable the development of a new access to the Northern Quarter.
CSP. 12	In order to enhance the role of the town, the Core Strategy will support the proposed development of the land east of Lydney for a new neighbourhood and will promote a new mixed development including amenity land along the axis between the harbour and the town centre. The development of the town centre including improvements following the implementation of the highway strategy and the improvement of key retail sites will be supported. This will: • Enable employment generating uses to be developed, including about 15ha at Hurst Farm and about a further 5ha as part of the east of Lydney neighbourhood, and about 7ha at Mead lane. • Provide for about 1900 new dwellings over the period to 2026, and make maximum use of previously developed land. On eligible sites (over 10 dwellings/ 0.3ha, a 40% share of affordable housing will be sought*).

8. Core Strategy Retail Policy Summary Table

	• Improve the town centre and develop up to about an additional 600m2 convenience retailing and about1500m2 for comparison goods principally within the south eastern part of the town centre. • Encourage greater service provision and improved facilities to serve the town
CSP. 13	Within the area of the proposed Area Action Plan, a new mixed form of development will be promoted, using mainly under utilised land and redeveloping or adapting redundant buildings to form an area between the Harbour and the town centre containing recreation, employment and housing together with links to an improved town centre and the existing and new public recreation spaces. The plan will include proposals for improvements to the mainline station. Land within this area will be allocated for up to 200 dwellings, mixed employment, recreation and tourism/leisure uses together with retailing (at the town centre).
CSP. 14	The Core Strategy will in Coleford: Provide for about 650 new dwellings over the period to 2026, On eligible sites (over 10 dwellings/ 0.3ha, a 40% share of affordable housing will be sought). whilst maximising the use of previously developed land. Enable 6.8ha of employment generation uses to be developed, including service provision and continue to support the development of tourism facilities or accommodation. Support the continued redevelopment of the town centre including areas for mixed uses and further retailing (up to approximately 1200m2 convenience and about1300m2 for comparison goods).
CSP. 15	The Core Strategy will: Provide for about 350 new dwellings over the period to 2026, On eligible sites (over 10 dwellings/ 0.3ha), a 40% share of affordable housing will be sought). Additional housing beyond this level will only be permitted on small unidentified sites and suitable previously developed land within the town. Enable about 5ha of employment generation uses to be developed.

8. Core Strategy Retail Policy Summary Table

	Support the continued improvement of the town centre allowing further retail and service provision.
CSP. 17	**Monitoring- Strategic Objective: (To promote thriving sustainable communities)** The Policies in the LDF will be monitored, principally through the Annual Monitoring Report and local measures that are in place in the manner described under each policy and summarised in the table below. The main areas that will be monitored include: • Serviced employment land provided, and occupied • Housing completions by location and type (including delivery of affordable housing, by • tenure and location)- overall numbers against the annual requirement and against the numbers allocated to each location • Additional retail floorspace against the allocation policies • Renewable energy installation, use of recycling and waste management • To monitor Section 106 agreements and the implementation of development requiring them. If it appears that the policies are not being effective, the following actions will be taken: • Review of the policy or policies concerned and of the implementation mechanisms and agencies • action to slow or speed up the delivery of land for development depending on the rate of development achieved • Identification of alternative or additional land.

9. Settlement hierarchy and Retail Provisions Summary Table

9 Settlement hierarchy and Retail Provisions Summary Table

Settlement	Retail Provision		
	Summary	**Convenience**	**Comparison**
Cinderford	Up to about 2600m2 convenience and about 2300m2 comparison space primarily to attract trade now lost to the district. Development by private investor, throughout the plan period.	2600	2300
Lydney	About 1500m2 comparison, about 600m2 convenience floorspace as a part of redevelopment of site(s) in town centre, to be refined through AAP process.	600	1500
Coleford	Up to about 1200m2 convenience and 1300m2 comparision goods floorspace to be developed mainly on land presently identified for this purpose to provide greater range in the centre and retain/clawback some lost trade from centres such as Monmouth.	1200	1300
Newent	Up to about 1300m2 convenience and 1200m2 comparison floorspace to be permitted as redevelopment within the existing centre to increase market share.	1300	1200

10 Local Plan Retail/Town Centre Policies

Policy ref.	Policy	Replaced by Core Strategy Policy
Policy (R)FS.1 **Town Shopping Development in Defined Town Centres**	Class A1 shopping development will be permitted in defined town centres provided that it will not: 1. Cause harm to the Development Plan strategy 2. Adversely affect the vitality and viability of town centres when considered with any other recent or proposed development 3. Result in a significant increase in the length and number of car-based trips 4. Create an unacceptably adverse environmental or traffic impact 5. Result in an unacceptable limitation in the range and quality of allocated sites for other uses. In all cases development must provide for safe and convenient access by a choice of modes of transport, including public transport, cycling and walking.	Economy core policy and town policies 7, 10-15
Policy (R)FS.2 **Town Shopping Development Outside Defined Town Centres**	Class A1 shopping development will be permitted outside defined town centres only where there is a proven need for the development and there are no suitable alternative town centre sites or, in the absence of suitable town centre sites, suitable edge–of-centre sites, and provided it will not: 1. Cause harm to the Development Plan strategy	Economy core policy 7

10. Local Plan Retail/Town Centre Policies

	2. Adversely affect the vitality and viability of town centres when considered with any other recent or proposed development 3. Result in a significant increase in the length and number of car-based trips 4. Create an unacceptably adverse environmental or traffic impact 5. Result in an unacceptable limitation in the range and quality of allocated sites for other uses. In all cases development must provide for safe and convenient access by a choice of modes of transport, including public transport, cycling and walking.	
(R)FS.3 **Mixed Uses in Town Centres**	The use of upper floors in town centres for commercial, retail and residential uses will be permitted. Proposals incorporating non-retail (Class A1) uses at ground floor level will be permitted where they comply with Policy (R)FS.4.	Not Saved in Local Plan Review Saved Policies
(R)FS.4 **Primary and Secondary Retail Frontages**	Within the primary shopping frontages defined on the Plan Inset maps, proposals for a change of use on ground floors from retail (Class A1) will only be permitted where the proposal does not create a continuous frontage of two or more non A1 uses. An exception may be considered where the proposal makes a positive contribution towards the vitality and viability of the town centre and would not adversely affect the retailing function.	Town Policies and also in Allocations DPD Policy 10-15

10. Local Plan Retail/Town Centre Policies

	Outside the primary shopping frontages, all other shopping frontages within the town centre boundary will be defined as secondary shopping frontages. Within secondary shopping frontages, a change of use of from retail (Class A1), financial and professional services (Class A2), or food and drink (Class A3) uses will only be permitted where the proposed use would be complementary to the retail function of the town centre and would not affect the overall continuity of A1, A2 and A3 uses.	
(R)FS.5 **Shop Fronts**	Proposals for the alteration or replacement of shop fronts will be permitted where they meet the following requirements: 1. The proposed design and materials are compatible with the architectural style and materials of the building and surrounding buildings 2. The proposal retains those elements of an existing shop front which contribute to the character or appearance of the building and the area, particularly in Conservation Areas.	Saved Policy from 2005 Local Plan Not replaced in the core strategy but covered by town policies and frontage policies in Allocations DPD
(R)FS. 6 **Local Shopping Provision**	Within any of the defined settlement boundaries shown on the Proposals Map the development of shops and community facilities designed primarily to provide for neighbourhoods or villages will be permitted where the amenity of surrounding residents is not impaired and safe and convenient access and parking can be provided.	Economy Core Policy 7

11. Summary of all four town retail surveys

11 Summary of all four town retail surveys

No. of Units

Use Class	Cinderford				Lydney				Coleford				Newent			
	1999	2008	2009	2013	1999	2008	2009	2013	1999	2008	2009	2013	1999	2008	2009	2013
A1	58	56	52	44	73		78	70	66	73	73	63	43	48		49
A2	22	16	14	11	22		20	23	23	17	18	12	22	12		9
A3	0	4	4	9	11		13	11	7	11	9	7	4	7		5
A4	1	2	1	2	2		6	2	2	4	5	5	3	1		4
A5	0	6	7	7	0		9	10	0	8	8	12	0	3		5
B1	6	3	2	5	4		5	2	6	7	9	4	0	3		8
B8	0	0	0	0	0		0	1	0	0	0	0	0	0		0
C1	0	0	0	0	1		0	0	0	0	0	0	0	0		0
D1	2	3	3	13	5		7	12	3	7	8	8	4	7		9
D2	0	1	1	1	0		2	1	2	1	1	1	2	0		0
Vacant	23	15	19	17	4		10	17	14	9	8	17	10	7		7
Sui Generis	2	2	2	3	3		6	10	4	3	3	11	0	0		1
Total	114	108	105	112	125		156	159	127	140	142	140	88	88		97

Red columns represent the years in which survey data was not collected

11. Summary of all four town retail surveys

Percentage of Units

	Cinderford				Lydney				Coleford				Newent			
	1999	**2008**	**2009**	**2013**	**1999**	**2008**	**2009**	**2013**	**1999**	**2008**	**2009**	**2013**	**1999**	**2008**	**2009**	2013
A1	50.9	51.9	49.5	39.3	58.4		50	44.0	52.0	52.1	51.4	45	48.9	54.5		50.5
A2	19.3	14.8	13.3	9.8	17.6		12.8	14.5	18.1	12.1	12.7	8.6	25.0	13.6		9.3
A3	0.0	3.7	3.8	8.0	8.8		8.3	6.9	5.5	7.9	6.3	5.0	4.5	8.0		5.2
A4	0.9	1.9	1.0	1.8	1.6		3.8	1.3	1.6	2.9	3.5	3.6	3.4	1.1		4.1
A5	0.0	5.6	6.7	6.3	0		5.8	6.3	0.0	5.7	5.6	8.6	0.0	3.4		5.2
B1	5.3	2.8	1.9	4.5	3.2		3.2	1.3	4.7	5.0	6.3	2.9	0.0	3.4		8.2
B8	0.0	0.0	0.0	0.0	0		0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0		0.0
C1	0.0	0.0	0.0	0.0	0.8		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0
D1	1.8	2.8	2.9	11.6	4		4.5	7.5	2.4	5.0	5.6	5.7	4.5	8.0		9.3
D2	0.0	0.9	1.0	0.9	0		1.3	0.6	1.6	0.7	0.7	0.7	2.3	0.0		0.0
Vacant	20.2	13.9	18.1	15.2	3.2		6.4	10.7	11.0	6.4	5.6	12.1	11.4	8.0		7.2
Sui Generis	1.8	1.9	1.9	2.7	2.4		3.8	6.3	3.1	2.1	2.1	7.9	0.0	0.0		1.0
Total	100	100	100	100	100		100	100	100	100	100	100	100	100		100

Red columns represent the years in which survey data was not collected

12. 2014 Retail Survey data update

12 2014 Retail Survey data update

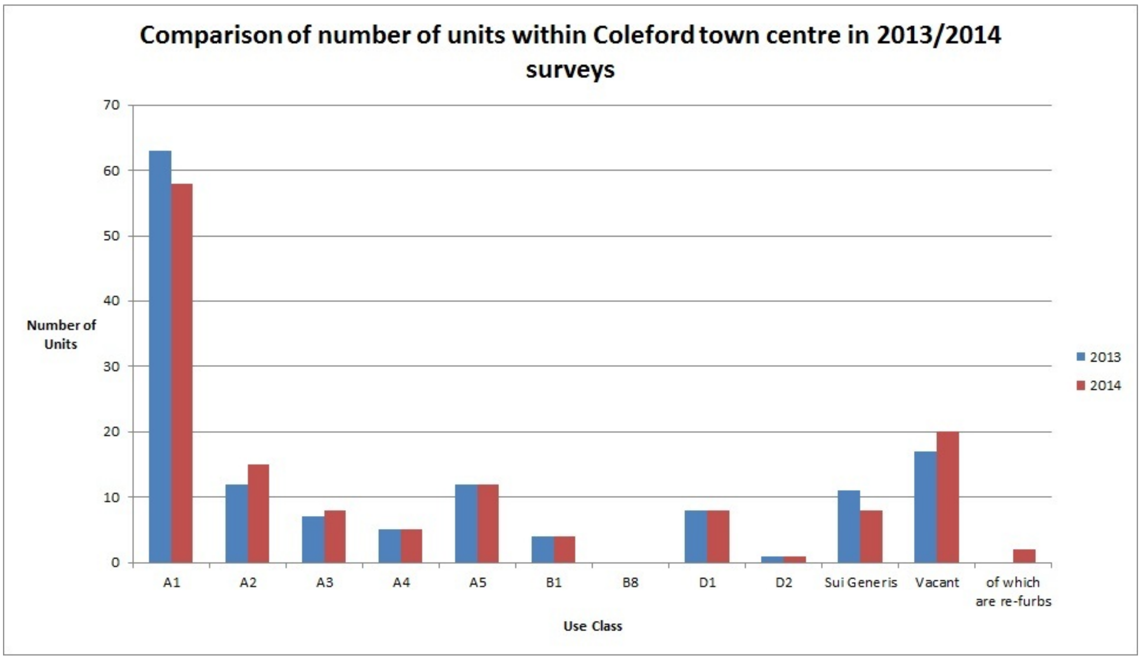
12.0.1 This report was produced using data and survey work carried out in the past upto and including a survey done in 2013. Following on from the completion of this report another survey update has been carried out for all the four towns and this section intends to give a brief summary of any changes that have occurred since the 2013 report in terms of number of units falling within each use class, the number of vacant units within each town centre and a comparison against the 2013 survey data. This will hopefully highlight any significant changes in the town centres since the most recent survey and any further trends that are emerging.

12.1 Coleford

12.1.1 Since the 2013 survey Coleford has seen some changes part of which are a result of approved planning permissions. Permission for a new supermarket has been granted permission on appeal and part of the application has resulted in the demolition of three units in Pyart Court in order to allow better site access. This has resulted in a loss of three previously A1 shop units. The current distribution of shops with the use classes as recorded in the 2014 survey is as below.

Use Class	Number of Units	Percentage within each use (%)
A1	58	41.1
A2	15	10.6
A3	8	5.7
A4	5	3.5
A5	12	8.5
B1	4	2.8
D1	8	5.7
D2	1	0.7
Sui Generis	8	5.7
Vacant	20	14.2
of which are re-furbs	2	1.4
Total	**141**	**100**

12. 2014 Retail Survey data update



12.1.2 The graph above shows the comparison of number of units falling within each use class in 2013 and the most recent update carried out in 2014. As proportions of the total number of units within Coleford town centre there has been a decline of 3% of the proportion of units within Use Class A1 with further decline in the proportion falling within the Sui-Generis category (2%). There has however been increases in the A3, and unfortunately vacant categories. Of the vacant proportion 1.4% out of 2.3% were vacant due to refurbishment. This could be argued that a pre-empted figure of 0.9% of units are vacant.

12. 2014 Retail Survey data update

Use Class	2013 Survey (%)	2014 Survey (%)	% Difference
A1	44.1	41.1	-3.0
A2	10.5	10.6	0.1
A3	4.9	5.7	0.8
A4	3.5	3.5	0.0
A5	8.4	8.5	0.1
B1	2.8	2.8	0.0
B8	0.0	0.0	0.0
D1	5.6	5.7	0.1
D2	0.7	0.7	0.0
Sui Generis	7.7	5.7	-2.0
Vacant	11.9	14.2	2.3
of which are re-furbs	0	1.4	1.4

12. 2014 Retail Survey data update

12.2 Cinderford

12.2.1 Since the 2013 Survey it is clear that Cinderford has had very little change in the number of units within each use class within the town centre even though some units have changed between use classes.

USE CLASS	NUMBER OF UNITS	USE CLASS %
A1	43	39.1
A2	10	9.1
A3	10	9.1
A4	2	1.8
A5	8	7.3
B1	4	3.6
B8	0	0
D1	13	11.8
D2	1	0.9
Sui Generis	2	1.8
Vacant	17	15.5
TOTAL	**110**	**100**

12.2.2 If we compare the 2013 and 2014 surveys in terms of numbers of units it is clear to see small changes in numbers within each use class. The table below shows that we have seen only small changes in numbers within each of the use classes with classes A1, A2, B1 and Sui Generis each loosing one unit and classes A3 and A5 gaining one unit each.

12. 2014 Retail Survey data update

Use Class	2013	2014	Difference
A1	44	43	-1
A2	11	10	-1
A3	9	10	1
A4	2	2	0
A5	7	8	1
B1	5	4	-1
B8	0	0	0
D1	13	13	0
D2	1	1	0
Sui Generis	3	2	-1
Vacant	17	17	0
Total	**112**	**110**	

12. 2014 Retail Survey data update

12.3 Lydney

12.3.1 The town centre retail survey carried out for Lydney in 2014 has identified some differences in the distribution of shop units between the different use classes. The distribution of the number of units within each use class can be seen below.

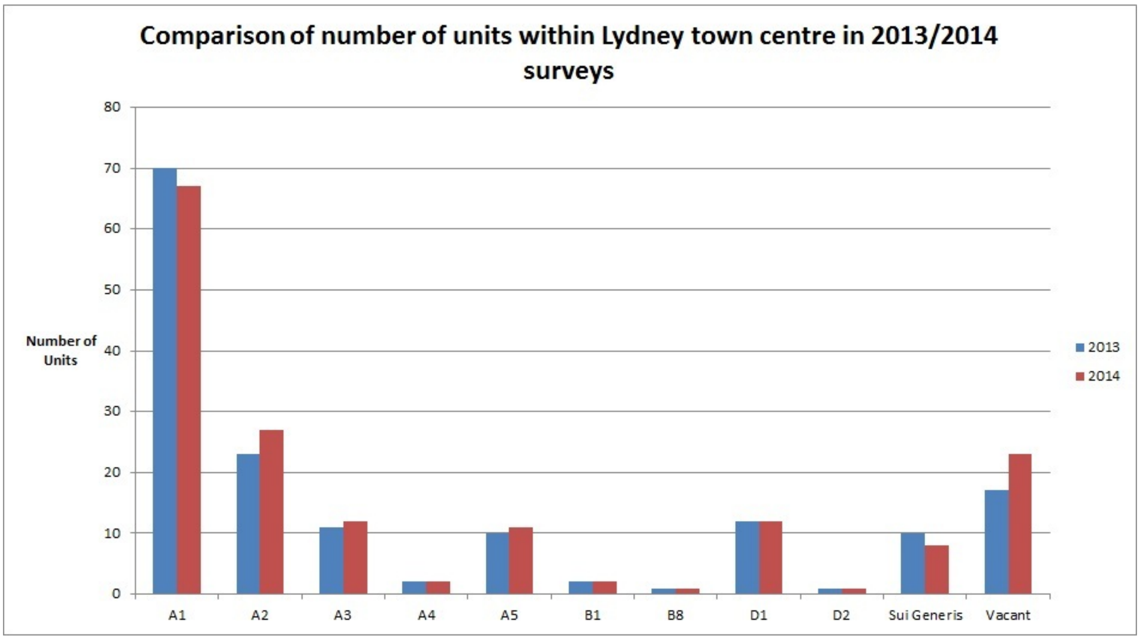
USE CLASS	NUMBER OF UNITS	USE CLASS %
A1	67	40.4
A2	27	16.8
A3	12	7.5
A4	2	1.2
A5	11	6.8
B1	2	1.2
B8	1	0.6
D1	12	7.5
D2	1	0.6
Sui Generis	8	5.0
Vacant	23	14.3
TOTAL	**166**	**100**

Lydney Town Centre Retail Survey Summary 2014

12.3.2 If we compare this years update with 2013's survey (table below) we can see that proportionately there has been an increase of 3.6% of units falling within the A1 use class and reduction by the same percentage in the number of vacant uses. There has been a small loss in number of units from use classes A2, A3, and A5. Other increases fall into class A4, B1 and Sui Generis. The numbers of units falling within class B8, D1 and D2 has remained the same across the period.

12. 2014 Retail Survey data update

USE CLASS	2013 USE CLASS %	2014 USE CLASS %	% difference between 2013/2014
A1	40.4	44.0	3.6
A2	16.8	14.5	-2.3
A3	7.5	6.9	-0.6
A4	1.2	1.3	0.1
A5	6.8	6.3	-0.5
B1	1.2	1.3	0.1
B8	0.6	0.6	0
D1	7.5	7.5	0
D2	0.6	0.6	0
Sui Generis	5.0	6.3	1.3
Vacant	14.3	10.7	-3.6



12. 2014 Retail Survey data update

12.4 Newent

12.4.1 The table below shows the surveys done in 2013 and 2014 for Newent town centre and the comparison between the years. Figures are a count of the number of units within each use class.

USE CLASS	2013 NO OF UNITS	2014 NO OF UNITS	Difference
A1	49	51	+2
A2	9	10	+1
A3	5	6	+1
A4	4	4	0
A5	5	5	0
B1	8	5	-3
C3	No data	4	No level of 4
D1	9	10	+1
D2	0	0	0
Sui Generis	1	1	0
Vacant	7	6	-1
TOTAL	**97**	**98**	**+1 (ex. C3 CLASS)**

12.4.2 Figures show that there has been little change in the total number of units within Newent town centre, however there has been changes between use classes. It is encouraging to see that one vacant unit has been filled since last years survey. There has been a loss in the number of units falling within use class B1, although these have been absorbed through gains in use classes A1, A2, A3 and D1.

12. 2014 Retail Survey data update

12.5 Summary

12.5.1 The table below is a summary of the 2014 survey results for the four town centres.

Use Class	Coleford		Cinderford		Lydney		Newent	
	Count	%	Count	%	Count	%	Count	%
A1	58	41%	43	39%	67	40%	51	52%
A2	15	11%	10	9%	27	17%	10	10%
A3	8	6%	10	9%	12	8%	6	6%
A4	5	4%	2	2%	2	1%	4	4%
A5	12	9%	8	7%	11	7%	5	5%
B1	4	3%	4	4%	2	1%	5	5%
B8	0	0%	0	0%	1	1%	0	0%
C3	0	0%	0	0%	0	0%	4	
D1	8	6%	13	12%	12	8%	10	10%
D2	1	1%	1	1%	1	1%	0	0%
Sui Generis	8	6%	2	2%	8	5%	1	1%
Vacant	20	16%	17	16%	23	14%	6	6%
Vacants (of which are refurbs)	2	0%	0	0%	0	0%	0	0%
Total	**141**	**100**	**110**	**100**	**166**	**100**	**98**	**100**

2014 Survey Results

12.5.2 It remains that Lydney has the highest number of shop units in total although Newent has the highest proportion of its shops within use class A1. Vacancy figures for Newent remain the lowest proportionately out of the four towns at only 6%

12. 2014 Retail Survey data update

compared to figures around the 15% mark for the other towns. Lydney has the highest proportion of uses in class A2 with both Cinderford and Newent having similar proportions of around 10%.

12.5.3 The Sui Generis use class has the most variation in the proportions of units within the category across the four town with Coleford leading in terms of numbers and proportion. Newent has the least number and proportion of units within this group as most of its uses are focuses with A use classes.

Use Class	Coleford	Cinderford	Lydney	Newent
A1	-0.3	-0.2	3.6	1.6
A2	0.1	-0.7	-2.3	0.9
A3	0.8	1.1	-0.6	0.9
A4	0	0	0.1	0
A5	0.1	1	-0.5	-0.1
B1	0	-0.8	0.1	-3.1
B8	0	0	0	0
D1	0.1	0.2	0	0.9
D2	0	0	0	0
Sui Generis	-2	1.3	1.3	0
Vacant	2.3	-3.6	-3.6	-1.1
of which are being refurbished	1.4	0	0	0

Table figures are displayed as percentage changes between the 2013 and 2014 surveys

12.5.4 The table above shows the percentage changes in uses within each use class for the four towns between the 2013 and 2014 surveys. There are relatively few losses (in red) from the use class in the towns and where uses have been lost they have generally been absorbed by others. Overall the changes that have occurred across the four towns are minimal with all percentage changes falling below +/- 4%.