

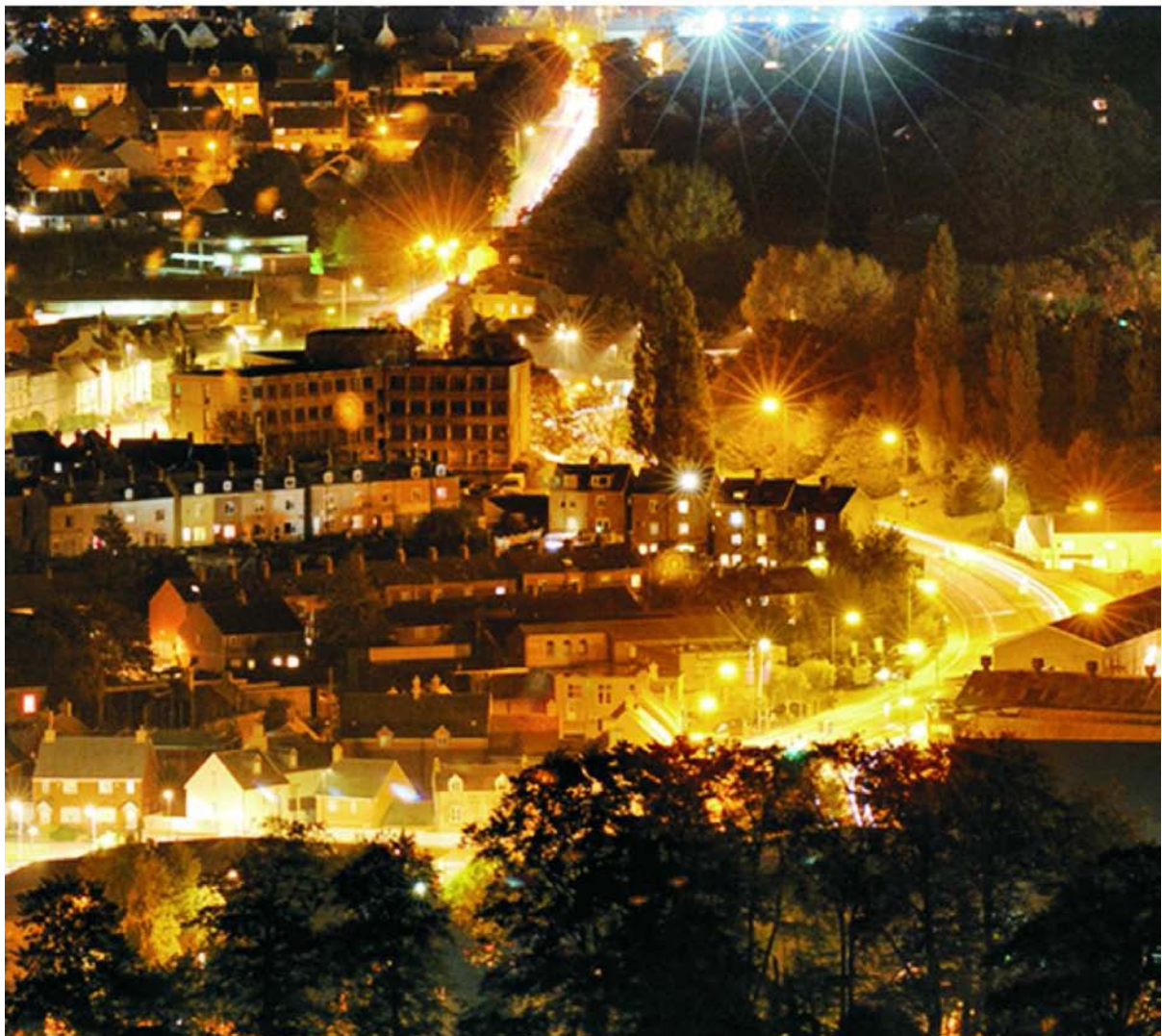
AECOM

BEgroup

Stroud District Employment Land Study

APPENDICES To Final Report

Prepared for Stroud District Council
February 2013



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APPENDIX 1 – LIST OF CONSULTEES

Advanced Insulation
Alder King
Andrew Watton & Co.
Ash & Co.
Bathurst
Bennett Jones
Bottle Green
Bruton Knowles
Cheltenham Borough Council
Cotswold District Council
Delphi Corporation
Ecotricity
Federation of Small Businesses – Stroud Branch
GFirst
Gloucester City Council
Gloucestershire Chamber of Commerce
Gloucestershire County Council
Gloucestershire Local Enterprise Partnership
Howard Tenens
Lambert Smith Hampton
LEDA Properties
Magnox
Nailsworth and District Chamber of Trade and Commerce
National Nuclear Laboratories
National Oilwell Varco (NOV Downhole)
Nuclear Decommissioning Authority
Omega Resource Group
Painswick Matters
Provelio
Robert Hitchins Group
South Gloucestershire District Council
St Modwen Developments
Stroud Chamber of Trade
Stroud District Business Club
Tewkesbury Borough Council
Valad
Vale and Valleys Business Partnership
Vale Business Forum
Wotton-under-Edge Chamber of Trade
WSP Textiles.

NB. In addition questionnaire surveys issued to 52 Town and Parish Councils and to 400 companies.

APPENDIX 2 – STRATEGY CONTEXT

A2.1 This appendix provides content on a number of sub regional and local strategy documents that form background information to the Employment Land and Economy Study. It should be read in conjunction with Section 2.0 of the main report.

Sub Regional

The Gloucestershire Integrated Economic Strategy 2009-2015 – GFirst / Gloucestershire County Council (2009)

A2.2 The purpose of the Gloucestershire Economic Strategy is to:

- *“Establish an ambitious vision for the Gloucestershire economy together with the key priorities that will deliver this vision*
- *Provide a strategic framework to guide investment in the County’s infrastructure and economy*
- *Use and influence national policies and regional strategies and plans to the benefit of Gloucestershire*
- *Provide the clarity to enable an effective Three Year Delivery Plan, revised annually, to be agreed and delivered by partners*
- *Guide the development of Joint Strategic Commissioning Plan (JSCP) targets*
- *Replace with a single economic strategy the previous Economic, Rural, Urban and Energy Strategies.”*

A2.3 The ‘mission’ of the Economic Strategy is *“To create and foster in Gloucestershire a sustainable, low carbon economic environment in which businesses flourish, communities thrive, and individuals have the opportunity to reach their potential”*.

A2.4 The economic needs of the County are covered under eight themes:

- *“A Gloucestershire Economy addresses the different economic needs of place, from the urban heart to the isolated rural community*
- *A Competitive Economy identifies the shape and components of a future competitive and productive Gloucestershire economy and how to achieve this*
- *A Connected Economy addresses the importance of good connectivity, physically and electronically, internally and globally to the future Gloucestershire economy*

- *A Low Carbon Economy addresses both the need to reduce CO2 emissions and the opportunities that derive from it for the Gloucestershire economy*
- *A Resilient Economy addresses the need for the Gloucestershire's economy to adapt to climate change and be more resilient to the risks from natural and economic events, accidents or malicious attacks*
- *A Skilled Economy addresses the need for the Gloucestershire working population to have the skills needed to make them as productive as possible fulfil their potential*
- *A Sustainable Economy considers how to conserve and enhance the environment as a foundation for a sustainable economy*
- *A Working Economy addresses the need for as many of the Gloucestershire population of a working age as possible to have a productive and satisfying job.”*

A2.5 The Strategic Objectives, discussions and policy priorities of the Economic Strategy are summarised in Table A2.1.

Table A2.1 – The Gloucestershire Integrated Economic Strategy Summary

Theme	Strategic Objective	Discussions	Relevant Policy Priorities (For GFirst Partners)
A Gloucestershire Economy	To make Gloucestershire a place where the economy thrives in both the urban and rural areas, and in all communities.	<ul style="list-style-type: none"> • Gloucestershire needs to be a place that is distinctive to the first time visitor. Distinctiveness is about reputation not branding and everyone and everything has a part to play in making Gloucestershire 'stand out from the crowd' • Key factors in attracting people to Gloucestershire include <i>“excellent schools, colleges and universities; good health care and public services; easy to travel in - lack of congestion; good access to the rest of the UK and overseas; good leisure and cultural facilities, sports, restaurants, theatres, concerts, museums, etc; quality of shopping facilities; and, safe, with low levels of crim.”</i> • A good quality of life should embrace everyone and not be confined to particular places or parts of society. Efforts need to be made to <i>“maintain high quality public sector housing and provide additional properly funded housing where it is needed; ensure that the facilities, staff and results in schools in deprived areas are better than the current average standard in the County; provide effective, accessible medical care and dentistry; provide good, affordable public transport access to jobs, training and services”</i> • Gloucester and Cheltenham are the key settlements of Gloucestershire and should be the focus for new development • The County's market towns are centres of economic activity, providing essential services for the surrounding communities. Protecting and enhancing their vitality and viability is critical, along with the vitality and viability of the County's villages and hamlets • An economically sustainable rural community <i>“has sufficient jobs of different types in or nearby (within five miles) to meet the employment needs of those living in the community; has, within a reasonable distance, viable services, retail and social (medical, school, etc) to meet the day-to-day needs of the community; has a range of housing, including affordable housing, to provide a balanced community and to make essential services viable”</i> • An Asset Based Development approach needs to be tested in Gloucestershire. 	<ul style="list-style-type: none"> • Working to make Gloucestershire distinctive and providing a quality of life and business environment that attracts and retains talented business entrepreneurs, innovative and creative thinkers, and academics. • Delivering initiatives so that the higher education and further education sectors better meet the future needs of Gloucestershire businesses and young people. • Growing the economy of Gloucester and Cheltenham • Providing the vision, leadership and resources necessary to reinvigorate the market towns and help villages to become more sustainable rural communities • Working with the appropriate authorities to reduce the incidence and impact of crime and disorder • Investigating how the principles of effectiveness of 'Asset Based Development' can be used to develop the economy of Gloucestershire as a whole.
A Competitive Economy	To develop a more competitive and productive Gloucestershire economy by 2015 in terms of sectors and	<ul style="list-style-type: none"> • The key business sectors of Gloucestershire are: advanced engineering, construction, creative industries, distribution, environmental technologies, finance and business services, food supply, ICT, leisure and tourism. Other important sectors include: 	<ul style="list-style-type: none"> • Using RDP-E and the Gloucestershire Food Vision to develop more sustainable food and drink production and processing in the County • Supporting initiatives to develop and nurture

Theme	Strategic Objective	Discussions	Relevant Policy Priorities (For GFirst Partners)
	employment opportunities.	<p>care, manufacturing and the public sector</p> <ul style="list-style-type: none"> • However, the key sectors in the Gloucestershire economy are always changing and the recession is likely to some of these changes. Three sectors expected to have increased importance are food and drink production, medical, environmental technology and the knowledge economy • Companies in the banking, finance and insurance and distribution, hotels and restaurants sectors account for 60 percent of Gloucestershire's businesses • The finance and business services sector provided 14 percent of the County's jobs in 2007. It is expected to remain important for Gloucestershire given the expertise of the current work force • Gloucestershire has a strong manufacturing and advanced engineering sector which needs to be able to compete effectively globally This means ensuring the retention of these sectors, the supply of new engineers and appropriate workspace • The County needs to continue to attract public sector organisations • The creative industries sector is one that offers the potential for significant economic growth nationally and locally but probably not until after the recession. The short term priority is therefore to ensure the retention of the sector as a base for future expansion • Reductions in the construction sector, during the recession, will lead to a pent up demand in the recovery, combined with increasing demand for low carbon construction • There is a continuing need for employment land, with good communication links and workspace that encourages the creation of job opportunities. The recession will lower demand for workspace in the short term but this is an opportunity to upgrade it and so increase the provision of high quality workspace suitable for future businesses in the longer term • The majority of the County's businesses (71 percent) are micro businesses employing 1-4 people (14 percent of employees). There are few large firms (0.5 percent) employing more than 200 people. However, they employ 23 percent of the County's employees. 	<p>engineering aptitude in young people and retain a profitable manufacturing sector</p> <ul style="list-style-type: none"> • Ensuring the provision of readily available employment land and workspace for the future particularly linked to new housing developments • Maintaining and developing the construction and creative industries sectors for the future • Using 'Solutions for Business' to support micro businesses and SME start up, survival and growth.
A Connected Economy	To provide the connectivity that enables Gloucestershire to be a place where people and communities interact	<ul style="list-style-type: none"> • Rail services to other conurbations, particularly London, must enable and not hinder economic growth and reduce the need to travel by car • The County Council has agreed to fund the reopening of operations at Sharpness Docks 	<ul style="list-style-type: none"> • Lobbying for high quality rail and road links to London and the South East • Tackling broadband accessibility issues in rural communities with innovative initiatives.

Theme	Strategic Objective	Discussions	Relevant Policy Priorities (For GFirst Partners)
	and connect whether locally, regionally or globally.	<ul style="list-style-type: none"> The County has a well developed strategic road network, with high capacity inter-urban roads, and the M5 Much of rural Gloucestershire is poorly served by public transport, and many communities have difficulty in accessing services Gloucestershire Airport is home to air taxi and private jet facilities serving over 250 destinations There are pockets around the County with poor or no broadband service. Internet connectivity should be a factor in the allocation of suitable workspace locations. Planners, architects and builders need to take broadband accessibility into account when considering new building developments. 	
A Low Carbon Economy	To develop an exemplary low carbon economy in Gloucestershire.	<ul style="list-style-type: none"> Organisations, businesses and individuals need to be made aware of how they can save costs and emissions by becoming more resource efficient. There is a growing opportunity for innovation in the development of zero carbon or carbon neutral technologies. The County has the advanced engineering and manufacturing talent to exploit this opportunity Gloucestershire does not have a vehicle manufacturing base, but by developing and installing the infrastructure needed to support electric vehicles Gloucestershire could take the lead in their use. 	<ul style="list-style-type: none"> Establishing a programme to make businesses and organisations aware of immediate savings that are possible by becoming more resource efficient, whilst developing the necessary expertise in the construction sector. Supporting businesses wishing to develop in the environmental technology sector and introducing a pro-active campaign to attract new business from this sector to Gloucestershire, including the development of an environmental technology business park Growing the necessary skills base rapidly across Gloucestershire. Encouraging the development of electric vehicle technology and infrastructure.
A Resilient Economy	To adapt the economy of Gloucestershire to climate change and its resilience to natural disasters, major accidents, malicious attacks and world or national economic crisis.	<ul style="list-style-type: none"> Economic sectors that are likely to be affected by climate change include agriculture and horticulture (different crops), forestry (faster growth), construction (different design), insurance (new products) and leisure and tourism (longer season). 	-
A Skilled Economy	To maximise the potential of the people of Gloucestershire by developing skills and talent that ensure profitable	<ul style="list-style-type: none"> Gloucestershire has a highly qualified workforce at NVQ levels 3 and above, compared to the rest of the South West England. However, it also has the highest proportion of the working age population with no qualifications in the region Skills gaps appear to be widening in Gloucestershire and closing 	<ul style="list-style-type: none"> Attracting new graduates to the key sectors in the Gloucestershire economy Ensuring that Gloucestershire has Higher and Further Education provision that meets the needs of the County's employers.

Theme	Strategic Objective	Discussions	Relevant Policy Priorities (For GFirst Partners)
	employment in the 21st Century and enable them to take advantage of and contribute to the economic development of the County.	across England, in particularly in the government, advanced engineering and manufacturing sectors.	
A Sustainable Economy	To realise fully the economic potential of Gloucestershire's environment whilst conserving and enhancing its exceptional quality of the countryside as a foundation for a sustainable economy.	<ul style="list-style-type: none"> • The County's unique countryside plays a major role in attracting new business and investment because it is a pleasant place to both live and work. • A key asset heritage is the Thames-Severn Canal. The ongoing restoration of the Saul Junction to the Brimscombe Basin section will generate about 580 person years of work and open up areas for mixed housing, social and employment development (creating around 2000 jobs). Additional tourism should generate £2.7million and 85 jobs. 	<ul style="list-style-type: none"> • Supporting the restoration of the Thames-Severn Canal.
A Working Economy	To increase the proportion of high value productive jobs, particularly in the 'knowledge economy', in the long term, whilst minimising unemployment in the short term.	<ul style="list-style-type: none"> • Gloucestershire's claimant count unemployment is 88 percent of the national rate with the highest unemployment rates concentrated in Gloucester and Cheltenham. Gloucestershire has lower levels of unemployment amongst the under 25s compared to the South West and Great Britain • In 2007 the knowledge based economy employed 55,300 people in the County, 21 percent of the workforce • Gloucestershire needs to emerge from the recession <i>"having retained the diversity of jobs in terms of sector and size of business whilst increasing the proportion of higher level jobs."</i> • Jobs are also an essential element of 'sustainable rural communities', i.e. there need to be jobs for 40 percent of the community's working population within a five mile radius of the settlement • At the time of this study there were 2850 third or voluntary sector organisations in Gloucestershire. These have a paid workforce of 14,000 supported by 140,000 volunteers • Important ongoing economic regeneration initiatives include the Cotswold Canals Project. This will regenerate the Thames-Severn Canal thorough the heart of Stroud District. 	<ul style="list-style-type: none"> • Promoting and supporting new and emerging wealth-creating businesses and industries, particularly in the 'knowledge economy' • Maintaining and strengthening existing key employment sectors and attracting and retaining valuable Foreign Direct Investment jobs • Exploiting the opportunity to participate in the jobs that will deliver the regeneration projects • Recognising the value of the 3rd Sector both in its contribution to the economy and its provision of jobs and supporting initiatives to strengthen it • Increasing the number of economically active people with disabilities in Gloucestershire and the health of the workforce in general.

Source: GFirst/Gloucestershire County Council 2009

Gloucestershire Local Economic Assessment – GFirst, Gloucestershire County Council (2011)

- A2.6 Gloucestershire is the northernmost county in the South West region and is divided into six districts (if South Gloucestershire is included). The County has an employment base of some 272,000 people, 14 percent of which are self-employed (higher than the national average).
- A2.7 The County is relatively self contained, 88 percent of Gloucestershire's employed residents also work in the County. Bristol is the main destination for those commuting out of Gloucestershire. Nearly twice as many people travel from Gloucestershire to Bristol than make the reverse journey and the picture is the same for Swindon. A high proportion of those who commute in to Gloucestershire to work come from Worcestershire. Half of these in-commuters travel to Tewkesbury Borough to work.
- A2.8 There is also considerable commuting within Gloucestershire. Over a third of Tewkesbury's working residents travel to Cheltenham and Gloucester to work, while a comparatively high proportion of Forest of Dean residents travel into Gloucester.
- A2.9 The population of Gloucestershire is highly qualified and skilled. The proportion of workers in professional occupations is above regional and national averages. Over the 2006-2011 period employment in the professional and skilled occupations has increased while employment in the sales and customer service occupations has declined.
- A2.10 The total number of employees in employment in Gloucestershire (254,300 in 2011), decreased by nearly 5 percent between 2004 and 2008. However, employment in Stroud District saw an increase over the same period. The study predicts employment growth of 2.8 percent over the next ten years. Cheltenham and Gloucester will be the focus of this growth, while the Forest of Dean will experience decline.
- A2.11 Identified growth sectors include nuclear technologies, aerospace, precision and medical instruments, creative industries (primarily digital media), environmental technologies and care activities. Gloucestershire already has a well developed knowledge economy comprising over a fifth of all employees in the County.

A2.12 In 2007 Gloucestershire had a Gross Value Added (GVA) of £11,500 million, 12 percent of the South West. Almost a third of Gloucestershire's GVA output was provided by the business service and finance sector. The County's productivity is well above the regional average.

A2.13 In 2008, Gloucestershire had a stock of some 26,000 businesses, mostly micro businesses employing up to nine people. The County has a high business survival rate with 94 percent of businesses surviving more than one year and half more than five years.

A2.14 In 2008, the total retail, office, factory and warehouse floorspace in Gloucestershire was 6.5 million sqm accounting for around 16,000 premises. 65 percent of this floorspace comprised factory and warehouse premises.

A2.15 Key issues for the Gloucestershire economy, highlighted in the Local Economic Assessment, include:

- An ageing population, combined with the continuing trend of young people leaving the County will lead to skills shortages/gaps in certain sectors. Indeed despite the highly qualified nature of Gloucestershire's workforce there are already skill shortages/gaps
- A balance will need to be struck between retaining a supply of knowledge workers to support evolving high tech industries/knowledge intense services and supporting existing industries will need to be maintained
- At present Gloucestershire's workforce is relatively self-contained. However, could be changed in the future by in-commuting from large urban areas outside the County where there are more working age people than available jobs
- The manufacturing sector is strong in Gloucestershire, particularly in relation to advanced engineering. However, it has experienced recent decline which is predicted to continue do to changing global conditions
- The recession has illustrated the vulnerability of the finance, banking and insurance sector to large scale restructuring and associated job losses
- The public sector accounts for nearly a third of employees in Gloucestershire. With ongoing cuts and changes in legislation the sector faces radical restructuring.

GFirst Action Plan 2011/2012 (Q4 Update January-March 2012) – GFirst

A2.16 GFirst, the Gloucestershire Local Enterprise Partnership, has four 'Core Priorities' for the next three years:

- *“Investment: Growing and developing businesses through the implementation of locally-based business support and networks across Gloucestershire – improving business and encouraging innovation*
- *Connection: Working with partners to develop the right planning environment and infrastructure – encouraging investment and sustainable growth*
- *Skills: Connecting education and skills with the needs of business and the local economy – ensuring the ready supply of talent and attracting and retaining young people*
- *Promotion: Promotion of Gloucestershire as a great place to invest, work, live and visit – attracting inward investment and tourists.”*

A2.17 Table A2.2 shows the ambitions and relevant actions of GFirst in relation to those Core Priorities.

Table A2.2 – GFirst, Ambitions and Relevant Actions

Core Priority	Ambitions	Relevant Actions/Activities
Investment	<ul style="list-style-type: none"> • Achieve an integrated offer from business support and membership organisations • Grow employment levels and the number of businesses in our key sectors and clusters • Establish Gloucestershire as the centre for innovation and enterprise. 	<ul style="list-style-type: none"> • Establish a successful Business Membership Group • Establish effective Key Sector Groups • Develop and pull together all business support for County businesses • Develop an enhanced supply chain network for the County • Delivery of programme of support for Community Enterprise Plans • Develop and facilitate initiative for innovation and growth.
Connection	<ul style="list-style-type: none"> • Attract investment and stimulate the market to provide superfast broadband for 75 percent of the County and a programme for full coverage by 2016 • Secure an investment timeline for key strategic infrastructure programmes including ensuring delivery of the re-dualling of the Swindon-Kemble line • Achieve an approach to economic 	<ul style="list-style-type: none"> • Deliver the High Speed Broadband Enhancement Programme • Identify key infrastructure needs from business • Ensure use of Economic Assessment in strategic planning • Support regeneration across the County.

Core Priority	Ambitions	Relevant Actions/Activities
	<p>development and strategic planning that promotes</p> <ul style="list-style-type: none"> • Business growth. 	
Skills	<ul style="list-style-type: none"> • Establish the exemplar for business/school integration driving enterprise and employability • Increase the uptake of vocational training and apprenticeships • Make an effective contribution to increasing employability in the County. 	-
Promotion	<ul style="list-style-type: none"> • Commission a broad reaching network of business people who support and promote the County globally and locally • Achieve widespread recognition as an inward investment proposition of Gloucestershire's key sectors and assets • Recognise the potential of the Cotswolds 'Superbrand' in increasing visitor numbers and spend across the County. 	<ul style="list-style-type: none"> • Review of Inward Investment Service activity and identification of additional resources • Co-ordinate and develop proactive communications campaigns for Inward Investors.

Source: GFirst 2012

Stroud District Local Plan – Stroud District Council (2005)

A2.18 The Local Plan sets out detailed policies and specific proposals for the development and use of land in Stroud District. The Local Plan Strategy identifies the requirement (as stated in the Gloucestershire County Structure Plan, (1999)) to provide 100 ha of additional employment land.

A2.19 New employment development will be focused on the new mixed use development allocation at Hunt's Grove. Hunt's Grove is within the Gloucester Primary Urban Area, adjacent to a major strategic, mixed use development site at the (former) RAF Quedgeley. Hunt's Grove has good links to Gloucester City Centre, including the nearby Waterwells Park and Ride, and contributions are to be sought towards securing further public transport improvements between this area and the city centre.

A2.20 Employment development will also be focused in the District's 'economic base' of the Stroud Valleys, at Cam and Dursley, with outlying major employment sites near Wotton-under-Edge and Berkeley. Protection will be given to identified employment sites where *“employment needs take precedence over other uses.”*

A2.21 Opportunities for enhanced inter-modal freight transport will be sought at Sharpness Docks and proposals which would prejudice the maximum use of the port facilities will be refused. Where appropriate, existing employment locations will be protected and new employment opportunities provided in key locations which have good. Small-scale employment opportunities and development for social purposes may be justified within defined settlements *“subject to the underlying objective of seeking development which is sustainable.”*

A2.22 Section 4.0 of the Local Plan defines employment (and tourism) policies for Stroud District. The objectives for employment policy in the District are:

- *“To maintain and enhance the economic diversity and vitality of the District*
- *To increase rural employment opportunities*
- *To allocate employment land (in accordance with Gloucestershire Structure Plan requirements) for local businesses to expand and new firms to start up*
- *To protect and improve existing key industrial areas*
- *To ensure employment uses have good public accessibility*
- *To minimise any adverse effects of necessary development for employment on the community or environment.”*

A2.23 The Local Plan’s strategy for supporting and developing the District’s economy is:

- *“To provide an adequate supply of employment land to meet the needs of the resident workforce and be in locations that are attractive to employers*
- *To ensure that new employment developments are genuinely accessible by public transport, cycling and walking, in order both to promote sustainability and to provide employment opportunities to people without access to a car*
- *To ensure that the majority of B8 employment land and land for other development generating significant heavy goods vehicle traffic is located with good access to main transport corridors and facilities, (particularly rail and canal), thus reducing the impact of HGVs on the environment and communities*
- *To protect the existing economic base by ensuring sites occupied by important employment uses are protected from other forms of development*
- *To provide a range of sites in size and nature to accommodate a wide diversity of employment uses*

- *To maximise the use of existing vacant, derelict or under-used employment land as far as possible or to seek alternative provision for those uses on unviable sites thus allowing the re-development of those sites for appropriate alternative uses*
- *To enable the extension or intensification of use of premises for growing businesses in the District;*
- *To control or relocate 'bad neighbour' development to places where its adverse impact on environment and community can be avoided or minimised*
- *To allow for the growth of work from home*
- *To enable the diversification of the rural economy with appropriate allocations and permissions for employment uses on land well related to communities having a good level of services and facilities*
- *To allow the re-use of rural buildings for employment in locations well related to communities having a good level of services and facilities*
- *To allow appropriate farm diversification projects."*

A2.24 From the gross Structure Plan requirement of 100 ha, the Stroud Local Plan deducts 35.16 ha of employment development, competed between 1st January 1991 and 31st March 2005, along with commitments (planning consents as at 1st April 2004) of 36.18 ha. This leads to a net requirement for a further 20.43 ha of land, as of 1st April 2004. This increases to 49.09 ha when land lost to other uses, to 31st March 2004, is included.

A2.25 The Plan expresses concern about a number of long term employment land allocations which have not been taken up. These include 18 ha at Sharpness Docks, which has been allocated since the 1980s. While the lack of interest in this land may suggest it is no longer viable for employment use, the Plan argues that recent economic growth at the Port (following its privatisation) should not be undermined by the loss of potential expansion sites. There is a need *"to provide a greater choice of sites to the market if the Stroud economy is to continue to flourish."*

A2.26 Policies EM1 and EM2 discuss the location of employment uses within Stroud District. EM1 indicates that B1, B2, B8 developments will be permitted within defined settlement boundaries where they can be *"integrated with housing, commercial, leisure and community facilities."*

A2.27 Large scale travel intensive uses, such as B1 offices, should be located in the defined settlements of Cam and Dursley, Nailsworth, Stonehouse, Stroud and Wotton-under-Edge, or where they can be accessed by public transport, walking and cycling. Large scale B8 storage and distribution uses will only be permitted *“where they will not lead to the increase of HGV traffic through defined settlements and they have good accessibility to, and use, one or more of:*

- *The rail network*
- *The port of Sharpness*
- *The Gloucester and Sharpness Canal*
- *The preferred routes for long distance lorry traffic.”*

A2.28 Policy EM2 states that large scale B8 uses will only be permitted outside defined settlement boundaries where:

- *“There is no suitable site within an allocated or protected employment area and no suitable building capable of re-use within the locality*
- *The proposal would not cause significant harm to the appearance or character of the countryside or to the amenities of local residents*
- *They have good accessibility to, and use one or more of:*
 - *The rail network*
 - *The port of Sharpness*
 - *The Gloucester and Sharpness Canal*
 - *The preferred routes for long distance lorry traffic.”*

A2.29 Policy EM3 highlights 37 employment sites and areas to be protected from redevelopment for alternative uses (see Table A2.3). Policy EM4 notes that the redevelopment of existing employment land not included in the sites/areas listed under Policy EM3 *“will be permitted where the site is no longer suitable or employment use and one or more of the following criteria are met:*

- *There is an adequate supply of employment land to meet local needs without retention of the site*
- *There are demonstrable environmental and/or conservation benefits that outweigh the loss of the employment land*
- *The loss of employment land through site rationalisation leads to investment in other parts of the site resulting in increased employment generation.”*

Table A2.3 – Protected Sites/Areas under Policy EM3

Ref.	Parish	Site/Area Name
EK1	Chalford	Chalford Industrial Estate
EK2	Eastington	Meadow Mill Industrial Estate
EK3	Stonehouse	Stroudwater/Oldends Lane Industrial Area
EK4	Stonehouse	Bonds Mill Industrial Estate, Bristol Road
EK5	Stonehouse	Upper Mills Industrial Estate, Bristol Road
EK6	Stonehouse	Ryeford Industrial Area
EK7	Cainscross	Dudbridge Industrial Area
EK8	Rodborough	Daniels Industrial Estate, Bath Road
EK9	Rodborough	Bath Road Industrial Estate
EK10	Stroud	Fromeside Industrial Estate, Dr Newton's Way
EK11	Stroud	Salmon Springs Industrial Estate, Painswick Road
EK12	Stroud	Stafford Mills Industrial Estate, London Road
EK13	Thrupp	Griffin Mills Industrial Estate, London Road
EK14	Thrupp	Phoenix Industrial Estate, London Road
EK15	Thrupp	Hope Mills Industrial Estate, London Road
EK16	Thrupp	Brimscombe Port Industrial Area, London Road
EK17	Woodchester	South Woodchester Industrial Area, Bath Road
EK18	Woodchester	Frogmarsh Mill Industrial Estate, Bath Road
EK19,	Nailsworth	Inchbrook Industrial Estate, Bath Road
EK20	Nailsworth	Nailsworth Mill Industrial Estate, Avening Road
EK21	Nailsworth	Spring Mill Industrial Estate, Avening Road
EK22	Frampton-on- Severn	Frampton Industrial Estate, Bridge Road
EK23	Cam	Draycott/Middle Mill Industrial Area, High Street
EK24	Cam	Cam Mills, Everlands
EK26	Dursley	Mawdsley's, Uley Road
EK27	Wotton-under- Edge	Tabernacle Road
EK28	Wotton-under-Edge	Renishaw, Old Town
EK29	Wotton-under-Edge	Berkshire Gravure, Brookside
EK30	Kingswood	Abbey Mill Industrial Estate, Charfield Road
EK31	Kingswood	Renishaw, New Mills
EK32	Hinton	Sharpness Docks
EK33	Berkeley	Rigestate, Station Road
EK34	Hardwicke	Former MoD Site 4
EK35	Hardwicke	Former MoD Site 2
EK36	Hardwicke	Former MoD Site 6

Ref.	Parish	Site/Area Name
EK37	Stroud	Lodgemore/Fromehall Mills

Source: Stroud District Council, 2005

A2.30 Policy EM5 allocates 12 additional sites for employment use (Table A2.4). These provide an additional 57.9 ha of employment land in Stroud District. It also highlights the Section 106 contributions which will be required from developers in order to secure an acceptable development on those sites.

Table A2.4 – Allocated Employment Sites under Policy EM5

Ref.	Parish	Site Name	Required S106 Provisions	Size (ha)
EA1	Cam	Land East of Draycott Mills Industrial Estate, Cam*	<ul style="list-style-type: none"> Contributions to off-site highway works, measures to improve traffic calming, public transport, pedestrian and cycle links to Cam and Dursley Rail Station, and to Cam and Dursley centres. Landscaping of the site. 	11.6
EA2	Eastington	Meadow Mill, Eastington*	<ul style="list-style-type: none"> Contributions to off-site highway works, measures to improve traffic calming, public transport, pedestrian and cycle links to Stonehouse and Stroud. 	2.2
MU1	Hardwicke	Hunt's Grove, Colethrop Farm*	<ul style="list-style-type: none"> These will be sought in conjunction with the provision of residential development (as listed under Policy H1 of the Local Plan) 	5.2
EA3	Hinton	Rear of Dock Road, Sharpness Dock*	<ul style="list-style-type: none"> Contributions to off-site highway works Contributions to provide improved public transport services to the development. 	9.2
EA4	Hinton	Land east of dock, Sharpness Dock*	<ul style="list-style-type: none"> Contributions to off-site highway works Contributions to provide improved public transport services to the development. 	2.8
EA5	Hinton	Adjacent tidal basin, Sharpness Dock*	<ul style="list-style-type: none"> Contributions to off-site highway works Contributions to provide improved public transport services to the development. 	4.0
EA6	Hinton	Bridge Road, Sharpness Dock*	<ul style="list-style-type: none"> Contributions to off-site highway works Contributions to provide improved public transport services to the 	3.4

Ref.	Parish	Site Name	Required S106 Provisions	Size (ha)
			development.	
EA7	Kingswood	Charfield Road, Kingswood*	-	0.3
EA9	Stonehouse	North of Stroudwater Industrial Estate	<ul style="list-style-type: none"> Contributions to off-site highway works including public transport, pedestrian and cycle links to Stonehouse and Stroud Contributions towards the re-opening of Stonehouse (Bristol line) railway station Protection of woodland and amenity areas. 	15.7
EA10	Stonehouse	Stroudwater Business Park, Phase 1	<ul style="list-style-type: none"> Contributions to off-site highway works including public transport, pedestrian and cycle links to Stonehouse and Stroud Contributions towards the re-opening of Stonehouse (Bristol line) railway station. 	1.5
EA11	Stonehouse	Land adj. ABB/Kent, Oldends Lane	<ul style="list-style-type: none"> Contributions to off-site highway works including public transport, pedestrian and cycle links to Stonehouse and Stroud Contributions towards the re-opening of Stonehouse (Bristol line) railway station. 	1.4
EA12	Thrupp	Adj Ham Mills, Thrupp*	<ul style="list-style-type: none"> Contributions to off-site highway works and pedestrian and bus stop facilities. 	0.6
			Total	57.9

Source: Stroud District Council, 2005

*These sites may have archaeological significance and may require an archaeological evaluation.

A2.31 Policy EM6 highlights that the extension of employment sites or premises within, or adjacent, to defined settlement boundaries or key employment sites will be permitted provided that:

- *“The development would not appear as an intrusion into open countryside;*
- *The site is capable of satisfactorily accommodating the proposed development in terms of layout, access, parking, landscaping or any other requirement of the development*
- *The development is appropriate in scale to the locality.”*

A2.32 Proposals for such extensions in the open countryside (Policy EM7) will be permitted if:

- *“The development is appropriate in scale to the locality*
- *There are no suitable alternative buildings or sites within or adjacent to settlements in the area*
- *The development would improve local employment opportunities.”*

A2.33 In terms of farm diversification, Policy EM8 states that *“new buildings for farm-based enterprises will be permitted if:*

- *A location in the countryside is appropriate to the business concerned*
- *The development is appropriate in scale to the locality*
- *The development would improve local employment opportunities.”*

A2.34 The Local Plan expresses support for home based businesses in Stroud District. It highlights that if the employment use remains ancillary to the domestic use of the property, then planning permission is not usually required. Unacceptable aspects of home based businesses may occur where the business generates visitors, traffic, noise or fumes beyond that normal at a single residence. In general B1 (light industrial) uses are most acceptable while B2 or B8 uses are likely to be unacceptable.

A2.35 Finally, transport Policy TR11 seeks to protect Sharpness Docks for handling freight and shipping repairs. Development proposals which conflict with this use will not be permitted.

Stroud Employment Land Review – Stroud District Council (2007)

A2.36 The Review has the following objectives:

- *“To undertake a quantitative and qualitative assessment of the provision of employment sites and premises in the District*
- *An assessment of future demand and need within the District [to 2026]*
- *Assess the relationship between existing supply and current needs and demands and the anticipated requirements arising from economic restructuring and projected market changes at national, regional and local level*
- *To formulate advice on providing a quantitative and qualitative assessment of the scale, location, accessibility, marketability and competitiveness of sites in*

Stroud District.”

A2.37 It outlines a number of economic challenges facing the District:

- *“Social and economic make up of the District*
- *The current property market*
- *The national, regional and local planning policy context* [issues mostly related to regional planning policy which is in the process of being abolished]
- *How demand for employment land is likely to change in the future*
- *The existing and future employment land portfolio within the District.”*

A2.38 In terms of the socio-economic make up of the District, the main concern is out-commuting. At the time of writing, up to one third of the working population commutes out of Stroud District to work. This is driven by the lack of skilled jobs within the District, compared to the high skill levels of the workforce. To reduce out-commuting, Stroud District will need to attract more knowledge-based industries, providing greater employment opportunities for highly skilled and well qualified residents.

A2.39 In terms of the current property market, demand for employment land is focused on sites close to the M5. The annual take up rate, between 1991 and 2006 was 2.74 ha. The bulk of the land supply was (and remains) close to M5 corridor, at Quedgeley, Stonehouse, Cam and Sharpness. The Review argues that (given that demand within Stroud is distributed across the District) these allocations will serve the wider needs of Gloucestershire, rather than meeting purely local requirements.

A2.40 In 2007, (i.e. before the recession) local rental levels were higher than in most neighbouring local authority areas. The Review notes that while this encourages developers to bring sites to the market, it may also discourage some new businesses from locating in the District.

A2.41 Market analysis, undertaken for the Review, indicated unmet demand for industrial premises from local, established companies in older premises. It also indicated that there are opportunities to upgrade some of the poorer quality existing stock to meet this demand, although any such refurbishment is dependant upon the location and viability of the properties.

A2.42 The office market in Stroud District was primarily local (for suites of less than 500

sqm), with supply generally meeting needs (although shortages of some sizes of accommodation, in some settlements were reported by property agents). Stonehouse is becoming an established office location, with rental levels which (at the time of writing) supported speculative development. However, it was not clear if recent office developments at Stonehouse were attracting inward investment or simply allowing the relocation of existing businesses.

A2.43 Stroud District was not considered to be a distribution/storage location, although Stonehouse could be promoted for this use given its position off the M5. Sharpness Docks has the potential to be developed as an integrated distribution hub, with a rail freight terminal and good links to the M5 motorway.

A2.44 According to Baseline (based on ‘policy-off’ Cambridge Econometrics employment projections) and Alternative (‘policy-on’) forecasting scenarios, a number of relevant business sectors are expected to grow in Stroud District to 2026:

- Computing Services
- Construction
- Distribution
- Other Business Services
- Professional Services (Alternative Scenario only).

A2.45 Forecasting indicated need for either 59.68 ha (Baseline Scenario) or 71.17 ha (Alternative Scenario) of employment land between 2004 and 2026 (See Table A2.5). Table A2.6 shows that Stroud District’s 2006 employment land supply was generally sufficient to meet this need, although there is a shortfall of B1(c)/B2 industrial land if Supply Scenario One is applied.

Table A2.5 – Land Need to 2026, ha

Use	Baseline Scenario	Alternative Scenario
(B1(a)) Office	18.72	19.73
(B2) General Industry	26.32	26.32
(B8) Distribution	14.64	25.12
Total	59.68 (183,302 sqm of floorspace)	71.17 (220,781 sqm of floorspace)

Source: Stroud District Council 2007

Table A2.6 – 2006 Land Supply Summary, ha

Use	Supply Scenario One	Supply Scenario Two
(B1(a)/(b)) Office/Technology	20.3	20.3
(B1(c)/B2) Light and General Industry	23.0	33.5
(B8) Distribution	27.4	46.3
Total	70.7 (236,000 sqm of floorspace)	108.4 (379,000 sqm of floorspace)

Source: Stroud District Council 2007

A2.46 Supply Scenarios One and Two include Stroud District’s 2006 supply of 62.5 ha of employment sites, (which could deliver up to 208,000 sqm of new accommodation). Scenario One also assumes that nine existing poor quality employment areas are redeveloped for mixed uses (delivering around 14,000 sqm of new premises), while Scenario Two assumes the same employment areas will be developed purely for employment uses (providing around 157,000 sqm of new premises). The nine identified areas were:

- Bath Road Industrial Estate
- Bridgend
- Brimscombe Port Industrial Area
- Daniels Industrial Estate
- Dudbridge Industrial Area
- Lodgemore/Fromehall Mills
- Ryeford Industrial Area
- Sharpness Docks.

A2.47 Both scenarios also identify four old industrial areas that have potential for intensification as part of mixed use schemes (Brimscombe Port, Ham Mills, Dudbridge/Fromehall and Cheapside Wharf) These could provide another 14,000 sqm of B1/B2/B8 accommodation to 2026. The Review considered Supply Scenario One to be the more likely outcome given the likely viability issues in redeveloping existing employment areas for new employment uses (with no higher value enabling development).

A2.48 However, these supply scenarios includes sites at Cam and Sharpness Docks, which total 28.75 ha, and would meet demand from the light/general industry and distribution sectors. The Review questions the viability of these sites in terms of their

likely contribution to the local economy and their appropriateness when related to the size of nearby settlements. De-allocating these sites would reduce the potential supply to 21.65-51.05 ha. Measured against Scenario One, this would give the requirement for a further 29.75 ha of additional employment land to 2026.

A2.49 Elsewhere, the 'Key Strategic' employment sites within Stroud District's 2006 employment land supply were at Quedgeley (Former MoD Site 4 and Hunt's Grove) while the 'Best Local' employment sites were at Stroudwater Industrial Estate. These sites should be protected for B1/B2/B8 uses.

A2.50 If further employment land is required, the characteristics of desirable sites will be:

- *“Relatively flat with services to the boundary or available at an economic cost*
- *Proximity to labour supply preferably accessible by a choice of modes (e.g. bus and car)*
- *Without restricted operating hours due to proximity of housing*
- *Sites sizes could vary substantially from small infill sites within existing areas to substantial sites in new locations.”*

Stroud Valleys Employment Study – Stroud District Council (2003)

A2.51 The aim of the study was to *“provide comprehensive baseline information to inform the development of Council policy, particular the land use elements of planning policy for employment purposes and a strategy for the restoration of the Stroudwater and Thames and Severn Canals.”* The study seeks to analyse the:

- *“ Workforce and jobs profile within the Stroud Valleys area*
- *An employment site profile of key areas within the Stroud Valleys area; and*
- *A property market overview.”*

A2.52 In terms of the workforce and jobs profile, the conclusions of the report were broadly positive. In 2003, the Stroud Valleys (and the wider Stroud District) had a growing working age population, with increasing economic activity rates and falling unemployment. An increasing proportion of the population were in high skilled 'senior manger and professional' jobs.

A2.53 However, this economic growth is combined high net out-commuting. While there is strong growth in the local labour force, the actual number of jobs generated locally appears to be declining (particularly within the manufacturing sector) and therefore

increasing numbers of residents are looking outside of Stroud District for work.

A2.54 Whilst the number of local employment opportunities has declined, the number of business within the Stroud Valleys (and the District) has increased. 158 new (mostly micro) businesses were created between 1998 and 2001 within the Stroud Valleys area. Survival rates amongst local businesses were also reported to be high. This micro business growth suggests that there will be increasing future demand for smaller workspaces within the Stroud Valleys (although opportunities to accommodate larger employers should not be ignored).

A2.55 A telephone survey of 200 local businesses in the Stroud Valleys identified the following key issues:

- Demand for freehold accommodation
- Demand for 'grow-on' sites and premises
- Demand for flexible accommodation, which can meet the needs of a range of businesses
- The need to build upon key strengths such as the quality of working environment, high survival rates and strong local loyalty.

A2.56 Demand research, undertaken for this study, makes the following conclusions:

- Demand was mostly local and for industrial units of 232 sqm to 697 sqm, for start-up and grow-on accommodation
- Demand was focused around the central area of the Stroud Valleys, including Stroud town. Popular location included Bath Road Industrial Estate and the Stroud Enterprise Centre
- Good freehold demand
- Limited demand from inward investors or larger firms looking to relocate. Such organisations are drawn to larger competing centres such as Gloucester, Cheltenham and Bristol
- Demand was for small offices of 5 sqm to 186 sqm, often from local industrial occupiers looking for administrative space
- With the exception of a few major employers, the Stroud Valleys has a limited office base
- Little demand for B8 accommodation, Stroud District's logistics market is focused around Junction 12, M5

- High levels of occupation in the employment areas of the Stroud Valleys, however, the quality of the workspace supply is considered an issue. A number of buildings, including units at Bath Road Industrial Estate and Brimscombe Port were considered no longer suitable to meet the needs of modern occupiers.

A2.57 The property market of the Stroud Valleys is split on an east/west basis. Older mill buildings are concentrated in the east while the large new employment sites are concentrated at Stonehouse to the west. Stonehouse benefits from its proximity to the M5 and provides larger, purpose built units to meet the needs of inward investors. The local property market continues to be focused on the existing employment areas of the Valleys, with little growth anticipated elsewhere, including Stroud, Stonehouse and Nailsworth town centres

A2.58 Key sectors, which could contribute to the future economic prosperity of the Stroud Valleys, include creative industries, education/training and distribution. The former mill buildings of the Stroud Valleys are well placed to meet the needs of creative industry firms although education/training organisations may require newer office workspace. Storage and distribution could be promoted at Stonehouse given its access to the motorway network. However, rather than pursuing specific growth sectors in the short term, the study recommends that future resources be used to provide appropriate land and premises that can assist in creating a more sustainable local economy.

A2.59 Conditions in existing employment areas should also be improved to increase their market attractiveness. Employment area along London Road along with the Inchbrook Industrial Area, Nailsworth could benefit from better signage, car parking, quality of environment, access, etc. A review of 21 employment areas within the Stroud Valleys also identified three redevelopment (possibly mixed use redevelopment) opportunities – Dudbridge Industrial Area, Lodgemore/Fromehall Mills, Ham Mill and adjacent land.

APPENDIX 3 – SOCIO-ECONOMIC PROFILE

Introduction

- A3.1 It is important to understand the nature of the economy in Stroud in order to provide suitable employment opportunities to facilitate sustainable growth. For example there is a need to try and provide employment land close to existing concentrations of businesses, in regeneration areas or in areas where companies want to locate.
- A3.2 This Appendix, therefore, considers the size of the economy, where the businesses are, and what type of businesses they are. By appreciating these aspects it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together a number of existing data sources. It also uses demographic data to build the picture, given that there are no readily available answers to some of the key questions included within this section.
- A3.3 Within the section, Stroud District is compared to the five other local authority areas of Gloucestershire. Where relevant, comparisons are also made to the neighbouring local authority area of South Gloucestershire, which is outside of the County of Gloucestershire.

Demographic Assessment

- A3.4 The population of the District as of the 2011 Census was 112,779 residents, which was 18.9 percent of the Gloucestershire total. As Table A3.1 shows, Stroud is the third most populous local authority area in Gloucestershire after Gloucester and Cheltenham.

Table A3.1 – Gloucestershire Population

Area	Population	Proportion, percent
Cheltenham	115,732	19.4
Cotswold District	82,881	13.9
Forest of Dean	81,961	13.7
Gloucester	121,688	20.4
Stroud	112,779	18.9
Tewksbury	81,943	13.7
<i>Gloucestershire</i>	<i>596,984</i>	<i>100.0-</i>

Source: 2011 Census

A3.5 As of mid-year 2012, 80.7 percent of Stroud District's working age population was in employment (61,900 residents), which was higher than both the Gloucestershire and South West averages (76.5 percent and 73.6 percent respectively). As Table A3.2 shows, unemployment in the District was also low, particularly when compared to county, regional and national averages. Indeed, the unemployment rate in Stroud is the second lowest in Gloucestershire, after Cotswold District.

Table A3.2 – Unemployment Rates, Percent*

Area	Proportion, percent
Cheltenham	7.5
Cotswold District	4.1
Forest of Dean	6.5
Gloucester	8.5
Stroud	4.8
Tewksbury	5.3
<i>Gloucestershire</i>	6.5
South Gloucestershire	5.9
South West	6.2
Great Britain	8.1

Source: ONS Annual Population Survey, 2012

*Percentage of economically active population.

A3.6 Deprivation is not a significant issue in Stroud District. Stroud is ranked as the 256th most deprived local authority area in England (out of 326 local authority areas) in the national Index of Multiple Deprivation (IMD, 2010). As Table A3.3 shows, this ranking is lower than many of the other local authority areas of Gloucestershire (as well as South Gloucestershire), but not significantly so. Stroud also has a far higher ranking (i.e. is less deprived) than both Cheltenham and Gloucester.

A3.7 In 2010, only two of the District's 69 Lower Super Output Areas (LSOAs) were in the top 30 percent most deprived in England. None were ranked in the top 10 percent. These areas of modest deprivation include parts of Stonehouse (Nastend) and Cam (The Quarry). 12 percent of Stroud District's LSOAs were in the 30 percent least deprived in England. These include areas of Nailsworth and Chalford.

Table A3.3 – IMD 2010, Gloucestershire (and South Gloucestershire) Local Authority Average Ranking*

Area	Ranking
Cheltenham	195
Cotswold District	266
Forest of Dean	186
Gloucester	125
Stroud	256
South Gloucestershire	271
Tewksbury	272

Source: ONS Annual Population Survey, 2012

* Ranked out of 326, with 1 being the most deprived authority in England (Liverpool) and 326 the least deprived (Hart District).

A3.8 Table A3.4 shows the level of National Vocational Qualification (NVQ) attained by the working age population of Stroud District. The District has the third highest proportion of working age residents qualified to NVQ Level 4 and above, in Gloucestershire, after Cheltenham and Tewksbury. This percentage is also above regional and national averages. The proportion of residents with no qualifications (6.6 percent) is the lowest in Gloucestershire. The proportion of unqualified residents is also lower than that of the South West and Great Britain.

Table A3.4 – Qualifications (2011), Percent

Level	NVQ4 and above	NVQ3 and above	NVQ2 and above	NVQ1 and above	Other qualifications	No qualifications
Cheltenham	45.0	62.5	76.7	84.5	7.1	8.4
Cotswold District	38.1	54.9	69.2	84.7	Not known*	11.8
Forest of Dean	26.8	50.0	66.6	82.9	Not known*	12.1
Gloucester	30.2	50.6	70.2	84.8	7.6	7.6
Stroud	38.4	56.8	77.7	89.1	Not known*	6.6
Tewksbury	39.9	59.1	75.1	92.9	Not known*	Not known*
<i>Gloucestershire</i>	36.6	55.8	73.0	86.4	5.3	8.3
South Gloucestershire	29.3	53.8	75.2	87.4	5.3	7.4
South West	32.9	54.6	72.6	86.3	5.6	8.0
Great Britain	32.9	52.7	69.7	82.7	6.7	10.6

Source: ONS Annual Population Survey 2011

*Sample size too small for a reliable estimate.

Employment by Occupation

A3.9 Table A3.5 illustrates the breakdown of employment by main occupation group. In Stroud District, the largest proportions of people are employed in professional, associate professional and technical, and skilled trades occupations. The proportion of people employed as managers and senior officials is below wider averages, while the proportion employed in professional, occupations is well above county, regional and national levels.

Table A3.5 – Employment by Main Occupation Group

Occupation Type	Stroud District, percent	Gloucestershire, percent	South West, percent	Great Britain, percent
Managers & Senior Officials	6.7	10.2	10.3	10.1
Professional Occupations	28.1	21.3	19.0	19.1
Associate Professional & Technical Occupations	10.4	13.7	13.2	14.0
Administrative & Secretarial Occupations	9.5	9.6	10.4	11.0
Skilled Trades Occupations	14.0	13.2	12.8	10.8
Personal Service Occupations	9.6	7.8	9.2	9.1
Sales & Customer Service Occupations	8.6	8.5	8.2	8.1
Process, Plant & Machine Operatives	Not known*	5.9	5.7	6.4
Elementary Occupations	9.3	9.6	10.9	10.9

Source: ONS Annual Population Survey, July 2011 to June 2012

*Sample size too small for a reliable estimate.

A3.10 Table A3.6 illustrates economic activity which is measured using 2011 Business Register and Employment Survey (BRES) data. BRES provides details of the number of jobs within differing industry sectors within a local authority area.

Table A3.6 – Economic Activity

	Employment Structure, proportion of jobs, percent			
	Stroud District	Gloucestershire	South West	Great Britain
Agriculture and Fishing*	0.1	0.2	1.1	0.8
Mining, Quarrying and Utilities	1.8	1.4	1.3	1.3
Manufacturing	22.3	12.8	9.7	8.7
Construction	6.1	4.8	4.5	4.6
Motor Trade, Wholesale and Retail	14.1	15.4	16.9	16.0
Transport and Storage	4.5	3.8	4.1	4.6
Information and Communication	2.8	4.1	3.0	3.9
Finance and Insurance, Property, Professional and Business Administration	13.5	20.6	18.3	20.9
Public Administration, Education and Health	24.0	27.7	28.9	27.9
Other Services	10.8	9.2	12.2	11.3

Source: Business Register and Employment Survey 2011

*Excludes farm based agriculture.

A3.11 Table A3.6 illustrates the strength of public sector employment in Stroud District. Almost a quarter of the District's workforce is employed in public administration, education and health. However, this is below county, regional and national averages.

A3.12 Compared to wider averages, the manufacturing sector employs a very high proportion of local people in Stroud District. It accounts for 22.3 percent of jobs, almost double the Gloucestershire average and 57-61 percent greater than the regional and national averages. This illustrates the strength of manufacturing employment in Stroud District's many industrial estates and mill properties.

A3.13 Within the general manufacturing sector, some key local sub-sectors include the 'manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks' which employed 2,090 in 2011. Another 1,466 were employed in the 'manufacture of general purpose machinery'. The 'manufacture of dairy products' and the 'treatment and coating of metals; machining' both employed more than 600 people each.

A3.14 By comparison, the proportions employed locally in office based sectors such as 'finance and insurance, property, professional and business administration' and 'information and communication', is well below wider averages.

A3.15 Agriculture, forestry and fishing employ only 0.1 percent of the District's population. However, farm based agricultural employment is excluded from BRES. As an alternative measure, the Department of Environment, Food and Rural Affairs June 2010 Survey of Agriculture and Horticulture (latest available data at the local authority level) indicates that in that year there were 589 agricultural holdings in Stroud District, farming 35,708 ha of land. Almost two thirds of this land was used as grassland to support livestock, 19 percent for the growing of cereals and the remaining 15 percent was used for other arable crops, fruit and vegetables. Together these farms employed 1,371 people including 923 full and part-time farmers, 323 full and part-time workers, 40 salaried managers and 85 casual workers.

Numbers and Sizes of Businesses

A3.16 As of mid-2011 there were 5,810 VAT/PAYE registered businesses in Stroud District (19.8 percent of the Gloucestershire total, see Table A3.7). This figure may exclude very small companies operating below the minimum financial threshold. The District has the second largest supply of active businesses in Gloucestershire, after Cotswold District. Perhaps surprisingly, the number of companies in Stroud District is greater than in Cheltenham and, most notably, Gloucester.

Table A3.7 – Number of Businesses

Area	No. of Businesses
Cheltenham	5,435
Cotswold District	6,035
Forest of Dean	3,860
Gloucester	4,215
Stroud	5,810
Tewksbury	3,955
<i>Gloucestershire</i>	<i>29,310</i>
South Gloucestershire	10,040
South West	237,995
Great Britain	2,464,265

Source: ONS, 2011

A3.17 82.8 percent of businesses in Great Britain employ less than ten people (micro businesses), and overall 96.5 percent of all businesses are classified as small (up to 49 employees). Business sizes in Stroud District generally follow sub-regional, regional and national averages. As Table A3.8 shows, 97.4 percent of businesses in the District employ less than 50 employees, while the proportion employing less than ten is slightly above wider averages at 85.5 percent.

Table A3.8 – Business Sizes

Area	Number of Employees						
	1-4	5-9	10-19	20-49	50-99	100-249	250+
Cheltenham	67.2	15.6	8.1	6.0	1.5	1.1	0.5
Cotswold District	73.5	13.9	7.1	3.7	1.1	0.5	0.2
Forest of Dean	73.6	13.3	6.7	4.5	1.2	0.6	0.1
Gloucester	58.8	17.4	10.2	7.8	3.3	1.8	0.7
Stroud	71.9	13.6	7.3	4.6	1.5	0.7	0.4
Tewksbury	70.5	13.5	7.2	5.6	1.4	1.3	0.5
Gloucestershire	70.0	13.4	7.9	5.4	1.8	1.1	0.4
<i>South Gloucestershire</i>	67.6	13.9	8.2	6.1	2.3	1.3	0.6
South West	68.5	15.1	8.1	5.4	1.7	0.8	0.4
Great Britain	68.0	14.8	8.2	5.5	2.0	1.0	0.5

Source: ONS 2011

A3.18 Stroud has the third highest proportion of micro businesses in Gloucestershire after Cotswold and Forest of Dean Districts. By comparison, the proportion of micro businesses in Gloucester is low (76.2 percent) while the proportion of large companies, employing more than 100 staff, is high at 2.5 percent.

A3.19 The total number of VAT registered businesses can be broken down further by industry sector. Table A3.9 shows that 14.6 percent of Stroud District's active businesses are in the professional, scientific and technical sectors, comparable to the Gloucestershire average and well above the South West average of 11.9 percent.

A3.20 The second largest business sector is construction, which accounts for 11.5 percent of VAT registered businesses. The production sector is also strong in Stroud District. At 8.4 percent, Stroud's share of this sector is well above wider averages.

Table A3.9 – VAT Registered Businesses by Sector, percent

Sector	Stroud District	Gloucestershire	South West	Great Britain
Agriculture, Forestry and Fishing	7.9	7.5	9.6	6.0
Production	8.4	6.4	5.8	6.3
Construction	11.4	10.6	11.4	12.5
Motor Trades	3.1	3.1	3.3	3.2
Wholesale	4.7	4.4	4.2	5.0
Retail	9.0	10.3	10.9	9.0
Transport and Storage	3.1	2.9	3.0	3.2
Accommodation and Food Services	4.9	5.8	7.0	6.1
Information and Communication	6.5	6.2	5.3	7.3
Finance and Insurance	1.6	2.9	2.3	2.1
Property	2.9	3.3	3.3	3.6
Professional, Scientific and Technical	14.6	14.2	11.9	16.2
Business Administration and Support Services	6.7	7.2	6.5	6.9
Public Administration, Defence, Education and Health	8.5	8.6	8.9	5.7
Arts, Entertainment, Recreation and Other Services	6.7	6.6	6.6	6.9

Source: ONS 2011

A3.21 In comparison, the proportions of accommodation and food services; finance and insurance; property; and business administration and support service businesses in the District are lower than elsewhere.

Business Creation

A3.22 According to the Stroud 2012 Half Year Business Confidence Report, 191 companies were formed in the GL5 and 6 postcode areas in Stroud in the first half of 2012 (these postcodes cover Stroud town, the Valleys area between Ebley and Chalford, and rural areas north, east and south of Stroud town). This is 15.8 percent higher than the same period of 2011, when only 165 new businesses were created. In

comparison, the national increase in business formation between January-June 2011 and January-June 2012 is only 10.7 percent. The highest recent total for business creation in the first half of the year was in 2007, when 192 new companies were formed in Stroud District.

A3.23 91 companies were dissolved in Stroud District over the first half of 2012. This is a reduction of 18.9 percent on than the same period of 2011, when 111 companies were dissolved. The reduction in the number of companies closing between January-June 2011 and January-June 2012 is greater than the national figure of 8.9 percent. During the recession, the peak period for company closures was the first half of 2009, when 149 firms dissolved.

A3.24 Table A3.10 shows annual rates of company creation and dissolution in Stroud District between 2007 and 2011. There was a decline in the annual net growth of the District's stock of businesses over the period 2007-2009, from +175 in 2007 to only +26 in 2009. This reflects the impact of the national recession. Net stock growth has subsequently improved over 2010/2011, suggesting improving business confidence and a recovery of the local economy. 2011 represents a peak in the total number of businesses created (324) while 2009 saw the highest rate of company dissolution (284).

Table A3.10 – Company Creation and Dissolution, 2007-2011*

Year	New Companies Registered	Companies Dissolved	Net Change
2011	324	193	+131
2010	320	243	+77
2009	310	284	+26
2008	272	151	+121
2007	312	137	+175

Source: ONS 2011

*Data obtained from the Stroud 2011 Annual Business Confidence Report

Geographic Location

A3.25 Table A3.11 shows the distribution of office and industrial premises (hereditaments identified by the Valuation Office for the purposes of business rates collection). The spatial distribution can be analysed by Middle Super Output Areas (MSOAs). Stroud District comprises 15 such MSOAs. The most recent Valuation Office data available

at the MSOA level is only for 2008, which pre-dates the recession. A breakdown of the data by MSOA is included at **Appendix 4**.

Table A3.11 – Distribution of Premises and Homeworking

Area	Middle SOAs	Number of Units		Number of People Homeworking
		Factories/Warehouses	Offices	
Berkeley Includes Sharpness, Stone	012	73	37	364
Cam/Dursley Includes Stinchcombe, North Nibley	009, 011, 014	100	76	995
Frampton-on-Severn Includes Arlingham, Whitminster	003	91	18	485
Nailsworth/Chalford/Eastcombe Includes Minchinhampton, Horsley	008, 010, 013	286	83	1,285
Quedgeley Includes Brookthorpe, Haresfield, Upton St Leonards	001	76	11	443
Rural North East Includes Painswick and surrounding villages	002	55	11	614
Stonehouse Includes King's Stanley	004-005	286	117	725
Stroud Town Includes Brimscombe	006-007	441	267	942
Wotton-under-Edge Includes Kingswood, Alderley, Hillesley, North Nibley	015	52	39	509
Total	-	1,460	659	6,362

Source: *ONS Commercial and Industrial Floorspace 2008*

ONS Census 2001

A3.26 Table A3.11 shows that the number of industrial units is more than double the number of offices. The greatest concentration of premises is in Stroud town. MSOA 006, which includes Stroud Town Centre, on its own, has 154 industrial and 220 office premises. MSOA 007, which extends south east from the town centre, along the A419 to Brimscombe, contains another 287 industrial and 47 office premises. The dominance of Stroud is accounted for by the extensive industrial supply located at Ebley and within the Stroud Valleys.

A3.27 Stonehouse has the second largest supply. MSOA 005 extends across most of Stroudwater Industrial Estate, with 241 industrial units and 103 offices.

A3.28 Amongst the smaller settlements of Stroud District, Berkeley (including Sharpness Docks) and Frampton-on-Severn have the largest supplies with 110 and 109 properties respectively. There is relatively little commercial space in rural north east of the District.

Homeworking

A3.29 In Stroud District, homeworking accounted for 10.4 percent of the working age population in employment in 2001. This is slightly lower than the average for the South West (11.0 percent), but above that for England and Wales (9.1 percent). These figures are obtained from the 2001 Census and more up to date data will not be available until the appropriate results of the 2011 Census are published in 2013.

A3.30 High proportions of people worked from home in the rural MSOAs of the District. However, homeworking rates were also high in MSOA 006 which includes much of the Stroud urban area.

Commuting Patterns

A3.31 Based on the 2001 Census, 10,267 people made daily travel to work (TTW) trips into the District. As with homeworking, more up to date commuting data will not be available until the full results of the 2011 Census are published. The 2007 Stroud Employment Land Review notes that around 1,570 (15 percent) of these commuters work in Stroud Town Centre, with a further 400 (4 percent) working in Cam and Dursley.

A3.32 Conversely, 18,909 people made TTW trips out of the District, 35 percent of the 53,620 workers who lived in Stroud in 2001. The main destinations of these out-commuters were Gloucester, Bristol, Cheltenham, Tewkesbury and Cirencester. Overall, Stroud District is a net exporter of workers with 8,642 more people commuting out of the District than commuting in.

A3.33 65 percent of Stroud District's 2001 resident workforce (34,711 people) made TTW trips within the District. The main destinations for such internal commuting were:

- Berkeley (Although in 2001, this would have been linked to the then fully operational Berkeley Power Station)
- Dursley
- Kingswood
- Stonehouse (Stroudwater Industrial Estate)
- Stroud Town Centre
- The Stroud Valleys (including Brimscombe and Thrupp).

Earnings

A3.34 Table A3.12 shows that the average earnings of people living in Stroud District are higher than Gloucestershire, South West and national levels. Indeed the average weekly pay of Stroud District residents is higher than in any other local authority area in Gloucestershire, apart from Cheltenham. It is notably higher than rates in nearby Cotswold District.

Table A3.12 – Average Weekly Earnings

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Cheltenham	371.9	424.9
Cotswold District	306.6	318.8
Forest of Dean	354.6	400.4
Gloucester	383.9	368.6
Stroud	382.8	418.8
Tewkesbury	448.1	371.8
<i>Gloucestershire</i>	<i>374.7</i>	<i>385.1</i>
South Gloucestershire	354.4	409.5
South West	362.6	370.9
Great Britain	401.6	402.5

Source: Annual Survey of Hours and Earnings 2011

A3.35 The average earnings of people who work (but do not necessarily live) in Stroud District are lower, behind Tewkesbury and to a much lesser degree, Gloucester. However, they still exceed county and regional averages.

Summary

- A3.36 Stroud District has a population of 112,779, comprising an economically active and skilled workforce. This is evidenced by the high proportion of people who work in professional occupations in the District, compared to the rest of Gloucestershire and the South West. It is also an affluent area, amongst the top 25 percent least deprived local authority areas of England.
- A3.37 The public sector (public administration, education and health) accounts for 24.0 percent of all employment in Stroud District. The manufacturing sector also employs a further 22.3 percent, more than double county, regional and national averages. Manufacturing sub-sectors which employ large numbers of people locally include the 'manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks' (which employed 2,090 in 2011) and the 'manufacture of general purpose machinery' (which employed 1,466).
- A3.38 Stroud District has 5,810 VAT registered-businesses, the second largest supply in Gloucestershire after Cotswold District. A majority of these businesses are in the public administration, defence, education and health and manufacturing sectors.
- A3.39 Most businesses are very small, with almost two thirds employing only 1-4 staff. Stroud District has the third highest percentage of micro-business (less than 10 employees) in Gloucestershire, after the Cotswold and Forest of Dean local authority areas.
- A3.40 Measuring rates of new business creation and company dissolution, shows a decline in the annual net growth of the District's stock of businesses over the recessionary period 2007 and 2009. Since 2010 net stock growth has increased as more new companies are formed and the number of failing businesses decreases. This is evidence of local economic growth and district economy recovering from the recession.
- A3.41 The current structure of premises provision in Stroud is strongly industrial. Across the District, the number of industrial units is more than double the number of offices. The largest concentration of industrial and office premises is in Stroud town, extending south into the Stroud Valleys. Stonehouse (Stroudwater Industrial Estate) also has a

significant supply as do the smaller settlements of Frampton-on-Severn and Berkeley (including Sharpness Docks).

A3.42 In 2001, the latest figures available, homeworking in Stroud District accounted for 10.4 percent of the population. This is lower than homeworking levels across the South West but higher than the national average (9.1 percent).

A3.43 Commuting patterns indicate that the District is a net exporter of workers. In 2001, it was losing 8,642 people, 16.1 percent of its residents in employment, to the surrounding urban settlements. However, Stroud District is also attracting significant numbers of workers, particularly to Stroud Town Centre.

A3.44 The average earnings of people living in Stroud District are higher than elsewhere in Gloucestershire and the South West. The earnings of those who work in the District (but may commute from elsewhere) are lower, but still compare well with wider averages.

APPENDIX 4 VALUATION OFFICE HEREDITAMENTS BY MIDDLE SUPER OUTPUT AREA

MSOA Reference	Offices	Factories	Warehouses	All People	Works mainly at or from home
Berkeley					
Stroud 012	37	38	35	2,859	364
Sub-Total	37	38	35	2,859	364
Cam/Dursley					
Stroud 009	6	19	0	3,003	408
Stroud 011	8	42	0	3,931	336
Stroud 014	62	25	14	2,764	251
Sub-Total	76	86	14	9,698	995
Frampton-on-Severn					
Stroud 003	18	64	27	3,219	485
Sub-Total	18	64	27	3,219	485
Nailsworth/Chalford/Eastcombe					
Stroud 008	13	30	24	3,314	414
Stroud 010	27	79	69	2,462	444
Stroud 013	43	47	37	2,992	427
Sub-Total	83	156	130	8,768	1,285
Quedgeley					
Stroud 001	11	34	42	3,525	443
Sub-Total	11	34	42	3,525	443
Rural North East					
Stroud 002	11	32	23	2,824	614
Sub-Total	11	32	23	2,824	614
Stonehouse					
Stroud 004	14	35	10	5,188	430
Stroud 005	103	174	67	3,661	295
Sub-Total	117	209	77	8,849	725
Stroud Town					

APPENDIX 5 – STROUD VACANT PROPERTY SCHEDULES

Table A5.1 – Schedule of Industrial Premises

INDUSTRIAL				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 1, Quedgeley West Business Park	Quedgeley	Leasehold	Good	8,983
Unit 3, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	5,835
Unit 2, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	5,834
Unit 1, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	5,805
Unit 3, Brunel Way, Stroudwater Industrial Estate	Stonehouse	Either	Good	2,587
Unit 27, Nailsworth Mill Industrial Estate	Nailsworth	Leasehold	Moderate	2,497
Unit 9, Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	1,951
Unit 10 (South), Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	1,951
Unit 4, Brunel Way, Stroudwater Industrial Estate	Stonehouse	Either	Good	1,629
Unit 105, Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	1,579
Unit 1, Q Park, South Woodchester Industrial Area, Bath Road	Woodchester	Leasehold	Moderate	1,201
The Warehouse, Upper Mills Trading Estate, Bristol Road	Stonehouse	Either	Moderate	1,167
Workshop at Woodlands Farm, Clapton	Berkeley	Leasehold	Budget	1,115
Unit 8, The Quadrant Centre	Quedgeley	Either	Good	1,093
Unit 1, Brunel Court, Stroudwater Industrial Estate	Stonehouse	Leasehold	Good	1,080
Unit 101 (West), Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	1,022
Unit 104, Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	1,022
Unit 2, Q Park, South Woodchester Industrial Area, Bath Road	Woodchester	Leasehold	Moderate	952
Unit G, Station Road Industrial Estate, Woodchester Industrial Area	Woodchester	Leasehold	Moderate	766
Vehicle Workshop, Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	743
Unit 2, Brunel Court, Stroudwater Industrial Estate	Stonehouse	Leasehold	Good	648
Unit 3, Wimberley Mills, Wimberley Park, Knapp Lane	Brimscombe	Leasehold	Moderate	646
Workspace, Springhill, Upper Cam	Dursley	Leasehold	Budget	600

INDUSTRIAL				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit L4C, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	525
Unit L4A, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	509
Unit S1, Inchbrook Industrial Estate	Nailsworth	Either	Moderate	499
Unit 12, Merretts Mill Industrial Estate, Inchbrook Trading Estate, Bath Road	Nailsworth	Leasehold	Moderate	483
Unit S8, Inchbrook Industrial Estate	Nailsworth	Either	Moderate	437
Unit 72, Building 71/72, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	391
Unit 2B, The Brunel Centre, Brunel Way, Stroudwater Industrial Estate	Stonehouse	Leasehold	Good	385
Unit 3, Daniels Industrial Estate, Bath Road	Stroud	Leasehold	Moderate	375
Unit 7, Abby Mills Industrial Estate, Charfield Road	Kingswood	Leasehold	Moderate	353
Unit 1B, The Yard, Woodend Lane	Cam/Dursley	Leasehold	Moderate	300
Unit 23, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	295
Mill 3, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	289
Upper A, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	252
Unit 14, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	207
Unit 3, Stroud Enterprise Centre, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	202
Unit 14, Stroud Enterprise Centre, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	200
Mill 27, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	200
Unit 23E, Building 22/23, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	187
Mill 29, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	186
Mill 30, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	186
Unit 2, The Yard, Woodend Lane	Cam/Dursley	Leasehold	Moderate	180
Unit 14, Breadstone Business Park	Breadstone	Leasehold	Moderate	165
Unit 2, Stroud Enterprise Centre, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	164
Unit 11, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	162

INDUSTRIAL				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit F3, Draycott Industrial Estate	Cam/Dursley	Leasehold	Moderate	153
Upper C, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	139
Unit F2, Draycott Industrial Estate	Cam/Dursley	Leasehold	Moderate	118
Unit 12, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	90
Unit 15, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	89
Unit 10, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	77
Unit 9, Quedgeley East Business Park	Quedgeley	Leasehold	Budget	76
Mill 28, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	74
Unit 22F-A, Building 22/23, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	55
Unit 15, Breadstone Business Park	Breadstone	Leasehold	Moderate	37
Station Road, Cam	Cam/Dursley	Either	Moderate	35
Unit 16, Breadstone Business Park	Breadstone	Leasehold	Moderate	26
First Floor, Unit 7, Annexe, The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	14

Source: BE Group, 2012

Table A5.2 – Schedule of Office Premises

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Q Park, South Woodchester Industrial Area, Bath Road	Woodchester	Leasehold	Good	645
Suite 2, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	434
Suite 1, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	425
Suite 5, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	397
Ground Floor, The Mill, Ebley	Stroud	Leasehold	Moderate	327
First Floor, The Mill, Ebley	Stroud	Leasehold	Moderate	327
Mill 3, Lightpill Mill, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	289
Third Floor, The Mill, Upper Mills Industrial Estate, Bristol Road	Stonehouse	Leasehold	Moderate	266
Suite 2, Second Floor, Merrywalks House, Merrywalks	Stroud	Leasehold	Moderate	253
Fourth Floor, The Mill, Ebley	Stroud	Leasehold	Moderate	250
Third Floor, The Mill, Ebley	Stroud	Leasehold	Moderate	246

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 59, Aston Down, Cowcombe Lane	Chalford	Leasehold	Budget	232
Second Floor, The Mill, Ebley	Stroud	Leasehold	Moderate	232
Unit 26, Daniels Industrial Estate, Bath Road	Stroud	Leasehold	Moderate	209
Cotswold Chambers, John Street	Stroud	Either	Moderate	207
Suite 1, Prospect House, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	203
East Ground, The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	193
Unit 9, The Brunel Mall, London Road	Stroud	Leasehold	Moderate	192
Unit 21, Daniels Industrial Estate, Bath Road	Stroud	Leasehold	Moderate	186
Suite 1, Second Floor, Merrywalks House, Merrywalks	Stroud	Leasehold	Moderate	160
The Old Forge, Berkeley Estate	Berkeley	Leasehold	Moderate	149
Waterloo House, George Street	Nailsworth	Leasehold	Moderate	142
Kimberley House	Frampton-On-Severn	Leasehold	Moderate	141
First Floor, The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	137
Suite 2, Prospect House, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	133
18 Market Street	Wotton-Under-Edge	Leasehold	Moderate	124
Mill 19, Lightpill Mill, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	120
Ground Floor, Holcombe Mill, Spring Mill Industrial Estate	Nailsworth	Leasehold	Good	105
First Floor, Holcombe Mill, Spring Mill Industrial Estate	Nailsworth	Leasehold	Good	105
Second Floor, Holcombe Mill, Spring Mill Industrial Estate	Nailsworth	Leasehold	Good	105
Second Floor, The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	102
First Floor, The Counting House, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	100
First Floor, Courthouse, The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	97
52 Parsonage Street	Cam/Dursley	Leasehold	Moderate	96
Damery Works, Damery Lane	Woodford	Leasehold	Moderate	93
Ground Floor, Standish Village Hall, Standish	Stonehouse	Leasehold	Moderate	91

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
The Hooper Suite, Building 6, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	84
Mill 21, Lightpill Mill, Bath Road Trading Estate, Bath Road	Stroud	Leasehold	Moderate	79
Suite 3B, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	77
First Floor, Willow House, The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	76
403 The Waterfront, Bonds Mill	Stonehouse	Leasehold	Good	75
Unit 22, Breadstone Business Park	Breadstone	Leasehold	Moderate	72
May Lane	Cam/Dursley	Either	Moderate	70
Ground Floor (Right Hand Side), The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	68
Units 4 and 5, Breadstone Business Park	Breadstone	Leasehold	Moderate	66
Suite 3E, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	65
Suite 3C, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	51
Suite 3D, Drake House, Littlecombe	Cam/Dursley	Leasehold	Moderate	48
3 Annexe, The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	47
Suite G, South 1 st , The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	47
Unit 2, Breadstone Business Park	Breadstone	Leasehold	Moderate	46
First Floor, 10 John Street	Stroud	Leasehold	Moderate	42
Unit 4, The Brunel Mall, London Road	Stroud	Leasehold	Moderate	37
Third Floor, The Old Police Station, Beeches Green	Stroud	Leasehold	Moderate	32
Suite 6B, Building 6, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	28
Unit 3, The Brunel Mall, London Road	Stroud	Leasehold	Moderate	23
First Floor, Unit 2, Annexe, The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	13
Unit 4, Annexe, The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	13
Suite F, South 1 st , The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	11
Suite 7, West 3 rd , The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	10
Suite 6, West 3 rd , The Wheelhouse, Bonds Mill Industrial Estate	Stonehouse	Leasehold	Moderate	10

Source: BE Group, 2012

APPENDIX 6 – SITE SCORING SYSTEM

Site Location and Access	Location	Proximity to strategic highway network (M5 Motorway and/or A38, A46 or A419): <ul style="list-style-type: none"> • Site 0 km from a strategic road – score 10 • Site 0.5 km from a strategic road – score 9 • Site 1.0 km from a strategic road – score 8 • For each further half km distance from a strategic road, reduce score by one point, i.e. any site 5.0 km or further from a strategic road scores zero.
	Prominence	<ul style="list-style-type: none"> • Site adjacent to, and visible from motorway – score 10/9 • Site adjacent to, and visible from A road – score 8/7 • Site adjacent to, and visible from B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	<ul style="list-style-type: none"> • Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential Test	<ul style="list-style-type: none"> • Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Planning Status		<ul style="list-style-type: none"> • If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	<ul style="list-style-type: none"> • If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access), planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: <ul style="list-style-type: none"> • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		<ul style="list-style-type: none"> • Site available to develop within 0-1 year – score 10 • Site available to develop within 1-3 years – score 8 • Site available to develop 3-5 years – score 6 • Site available to develop 5+ years – score 2

APPENDIX 7 – a). SITE SCORING SCHEDULES

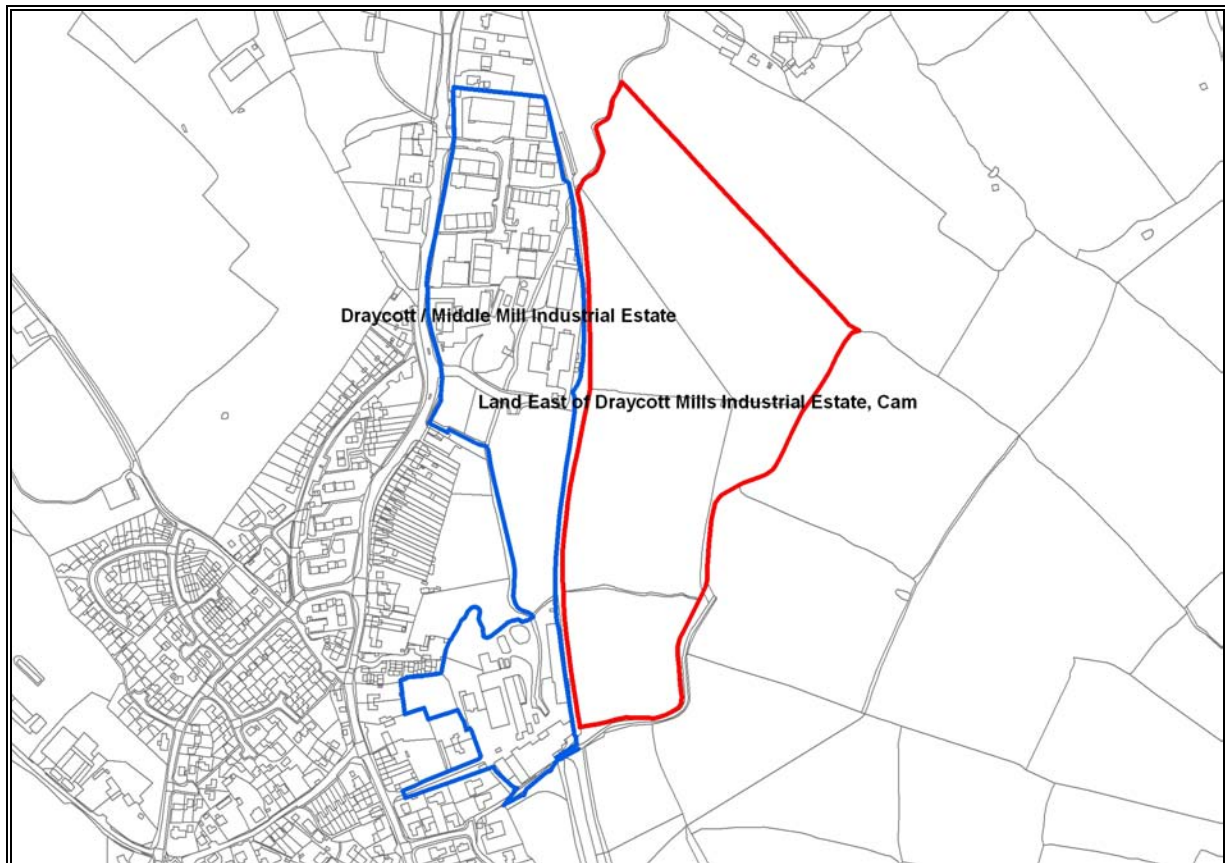
Site Ref.	Site Name	Settlement	Size (ha)	Site Location and Access			Planning Status	Site Conditions			Site availability	Total	
				Location	Prominence	Public Transport		Sequential test	Services Availability	Constraints			Environmental Setting
Additional Commitment 12	Land adj. Hill Paul Building, Cheapside, Stroud	Stroud town	0.43	9	4	10	10	7	10	8	5	8	81
MU1	Hunts Cove, Colethrop Farm, Hardwicke	Quegley/Junction 12, M5	5.75	9	4	5	8	7	8	10	7	8	73
MU3	Land at Lister-Pater, Long Street, Dursley*	Cam/Dursley	1.70	1	4	5	10	10	10	8	7	8	70
Additional Commitment 3	Opposite 8 Chapel Street, Cam	Cam/Dursley	0.72	4	3	5	10	10	10	7	5	8	69
Additional Commitment 9	Land East of Waterwells Business Park, Davy Way, Hardwicke	Quegley/Junction 12, M5	0.83	8	2	5	8	7	8	10	6	6	69
Additional Commitment 10	The Gables, Tiltups End, Horsley	Stroud Valleys	0.27	10	7	5	10	3	10	8	0	8	69
EA1	Land East of Draycott Mills, Cam	Cam/Dursley	11.60	6	2	10	8	7	8	2	10	6	66
Additional Commitment 5	Land South of Draycott Mills Trading Estate, Cam	Cam/Dursley	1.91	6	2	10	8	7	8	2	8	6	64
EA11	Land adj. ABB Kent-Taylor, Oldends Lane, Stonehouse	Stonehouse	1.40	8	4	5	4	7	4	10	6	2	63
EA9	North of Stroudwater Industrial Estate, Stonehouse	Stonehouse	9.00	7	2	5	4	7	4	10	10	6	62
Additional Commitment 2	Land at Chapel Hill, Newport, Berkeley	Berkeley (and surrounding villages)	0.33	10	8	5	10	3	10	6	2	8	61
Additional Commitment 4	Upper Uphorpe Farm, Uphorpe, Cam	Cam/Dursley	0.09	3	3	5	10	3	10	10	0	9	61
Additional Commitment 7	John Stayle Services, Puddlesworth Lane, Eastington	Eastington	0.09	8	4	5	10	3	10	10	0	8	60
Additional Commitment 11	Meister Masonry, Painswick	Painswick	0.14	9	1	5	8	3	8	10	1	10	59
Additional Commitment 8	(Land at) Berkeley Nuclear Power Station, Hamfield Lane, Berkeley	Berkeley (and surrounding villages)	0.74	1	4	5	10	3	10	4	6	8	56
EA7	Land off Charfield Road, Kingswood	Kingswood	0.30	0	3	5	10	7	10	0	4	10	56
Additional Commitment 6	Barn, Pear Orchard Farm, Uphorpe Lane, Cam	Cam/Dursley	0.38	2	1	5	10	3	10	10	1	8	55
Additional Commitment 1	Barn at Goldwick Farm, Lower Wick, Dursley	Cam/Dursley	0.03	6	2	0	10	3	10	10	1	8	54
EA2	Meadow Mill, Eastington	Eastington	2.20	9	4	5	4	3	4	8	6	2	53
EA12	Land adj. Ham Mills, A419 London Road, Thupp	Stroud Valleys	0.60	10	7	5	4	10	4	6	0	2	53
EA4	Sharpness Docks, Land East of Dock, Sharpness	Sharpness	2.80	0	4	0	4	3	4	8	3	2	33
EA3	Sharpness Docks, Rear of Dock Road, Sharpness	Sharpness	9.20	0	2	0	4	3	4	6	4	2	32
EA5	Sharpness Docks, Tidal Basin, Sharpness	Sharpness	4.00	0	5	0	4	3	4	2	4	2	29
EA6	Sharpness Docks, Land between Bridge Road and Oldminster Road, Sharpness	Sharpness	3.40	0	2	0	4	3	4	6	1	2	27

APPENDIX 7 – b). SITE SCORING SUMMARY

Site Ref	Site	Size, ha	Total
Additional Commitment 12	Land adj. Hill Paul Building, Cheapside, Stroud	0.43	81
MU1	Hunts Gove, Colethrop Farm, Hardwicke	5.75	73
MU3	Land at Lister-Petter, Long Street, Dursley*	1.70	70
Additional Commitment 3	Opposite 8 Chapel Street, Cam	0.72	69
Additional Commitment 9	Land East of Waterwells Business Park, Davy Way, Hardwicke	0.83	69
Additional Commitment 10	The Gables, Tiltups End, Horsley	0.27	69
EA1	Land East of Draycott Mills, Cam	11.60	66
Additional Commitment 5	Land South of Draycott Mills Trading Estate, Cam	1.91	64
EA11	Land adj. ABB Kent-Taylor, Oldends Lane, Stonehouse	1.40	63
EA9	North of Stroudwater Industrial Estate, Stonehouse	9.00	62
Additional Commitment 2	Land at Chapel Hill, Newport, Berkeley	0.33	61
Additional Commitment 4	Upper Upthorpe Farm, Upthorpe, Cam	0.09	61
Additional Commitment 7	John Stayte Services, Puddlesworth Lane, Eastington	0.09	60
Additional Commitment 11	Meister Masonry, Painswick	0.14	59
Additional Commitment 8	(Land at) Berkeley Nuclear Power Station, Hamfield Lane, Berkeley	0.74	56
EA7	Land off Charfield Road, Kingswood	0.30	56
Additional Commitment 6	Barn, Pear Orchard Farm, Upthorpe Lane, Cam	0.38	55
Additional Commitment 1	Barn at Goldwick Farm, Lower Wick, Dursley	0.03	54
EA2	Meadow Mill, Eastington	2.20	53
EA12	Land adj. Ham Mills, A419 London Road, Thrupp	0.60	53
EA4	Sharpness Docks, Land East of Dock, Sharpness	2.80	33

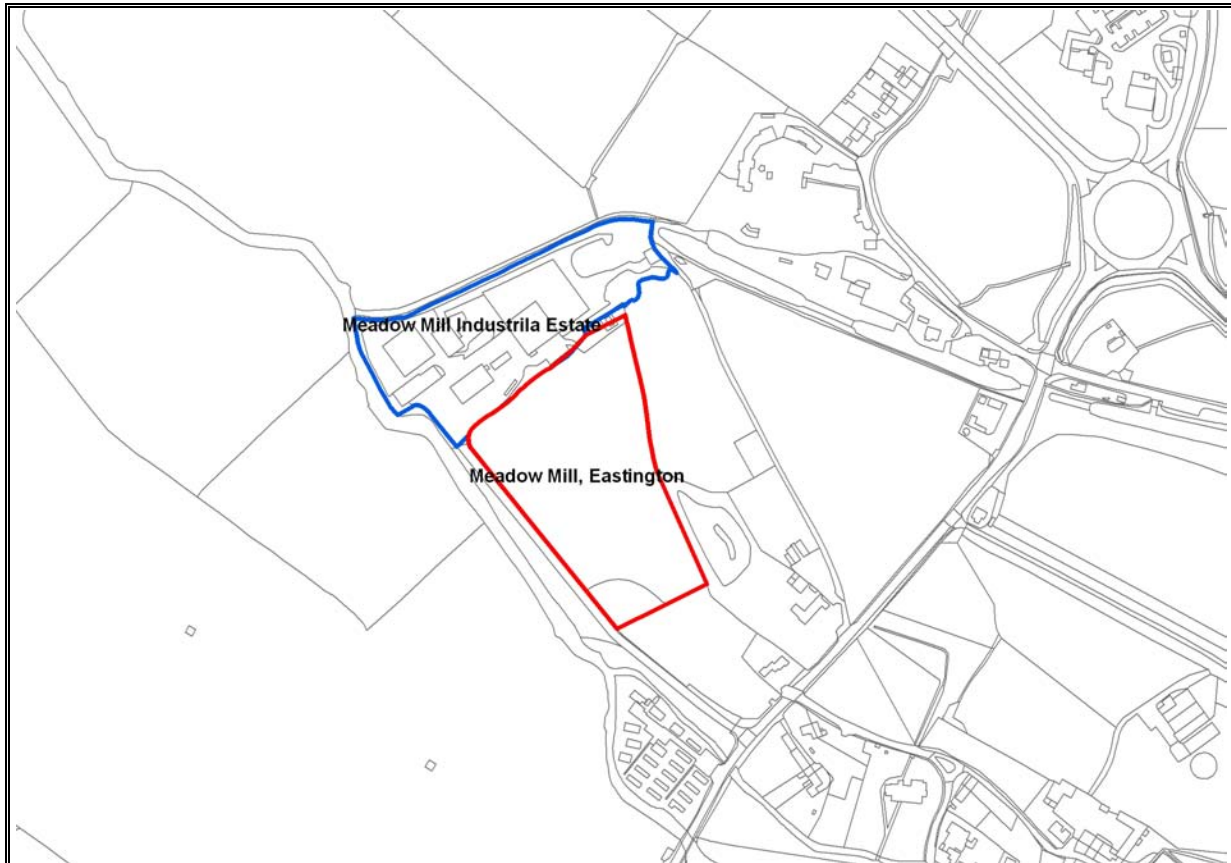
Site Ref	Site	Size, ha	Total
EA3	Sharpness Docks, Rear of Dock Road, Sharpness	9.20	32
EA5	Sharpness Docks, Tidal Basin, Sharpness	4.00	29
EA6	Sharpness Docks, Land between Bridge Road and Oldminster Road, Sharpness	3.40	27

APPENDIX 8 EMPLOYMENT SITE PROFORMAS



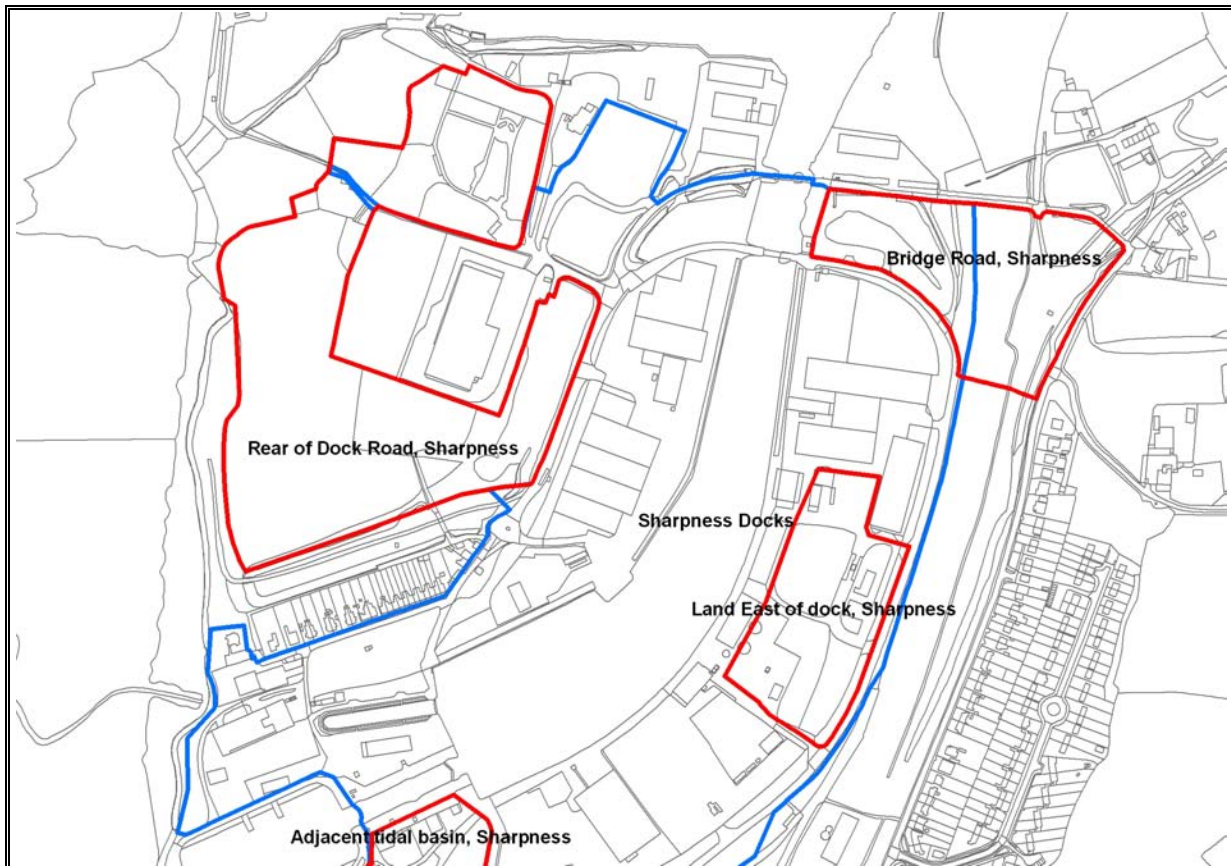
Site reference		EA1
Name		Land East of Draycott Mills, Cam
Brownfield /Greenfield		Greenfield
Owner		Bathurst and Springfield Investments
Description		Greenfield land, partly in agricultural use. Separated from existing industrial estate by disused railway.
Size, ha		11.60
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Trees on site. In flood risk area. Site includes areas of ecological value. Utilities – Available
Use	Existing	Agriculture
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		Access will need to include a bridge across the River Cam
Distance to M5 Motorway, km		8.4
Distance to A-road, km		0.1 – A4135 Draycott Road
Distance to Rail Station, km		1.4 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km		0.1 – A4135 Draycott Road

Distance to Services, km	0.1 – Petrol filling station and convenience retail (Draycott Road)
Adjacent Land Uses	Draycott/Middle Mill Industrial Area to the west Agriculture to the north, east and south
Planning Policy Status	Outline permission for 7,500 sqm of B1(a), 10,246 sqm of B1(c), 10,405 sqm and 6,739 sqm of B8 accommodation on 9.34 ha. An application to extend the time limit of this permission has recently been submitted – decision awaited. There is a further full planning permission for an 823 sqm office, for Kerry Ingredients, on 0.33 ha.
Planning Issues	Draycott/Middle Mill Industrial Area to the west (Policy EM3) North west of site is in Floodplain (Zones 2 and 3, Policy GE4) Proposed cycle route passes between site and Draycott/Middle Mill Industrial Area (Policy TR4)
Other information	The owner reports only moderate interest from potential occupiers for this land. Bathurst also lacks the funds to develop the site speculatively. They are now considering a revised scheme to develop half the site for housing (relocating some employment uses to adjacent land, also under their ownership) in order to cross-fund the development.
Serviced	No
Market availability	Available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	3-5



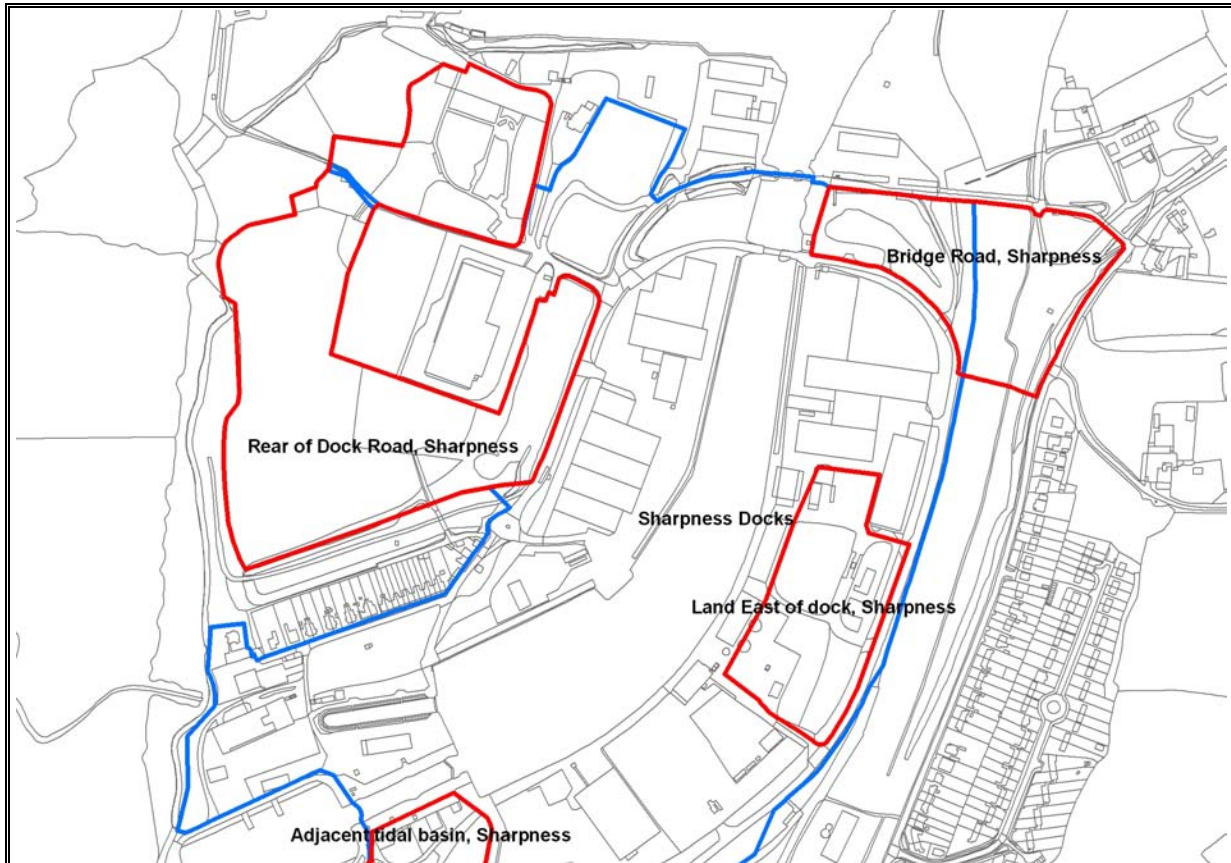
Site reference		EA2
Name		Meadow Mill, Eastington
Brownfield /Greenfield		Greenfield
Owner		Industrial Sales Ltd
Description		Vacant, greenfield site at entrance to existing trading estate.
Size, ha		2.20
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay In flood risk area. Utilities – Available
Use	Existing	Vacant
	Previous	Not known
Location Type		Rural
Accessibility		Access in place
Distance to M5 Motorway, km		2
Distance to A-road, km		1 – (A419)
Distance to Rail Station, km		4 – Stonehouse Station
Distance to Existing Bus Route, km		0.3 – Spring Hill
Distance to Services, km		4 – Stonehouse Town Centre
Adjacent Land Uses		Meadow Mill Industrial Estate to the north west Agriculture/housing elsewhere

Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5)
Planning Issues	Draycott/Middle Mill Industrial Area to the west (Policy EM3) North west of site is in Floodplain (Zones 2 and 3, Policy GE4) Proposed cycle route passes between site and Draycott/Middle Mill Industrial Area (Policy TR4)
Other information	Expansion land for the existing industrial estate. No plans to bring forward at this time.
Serviced	No
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	5+



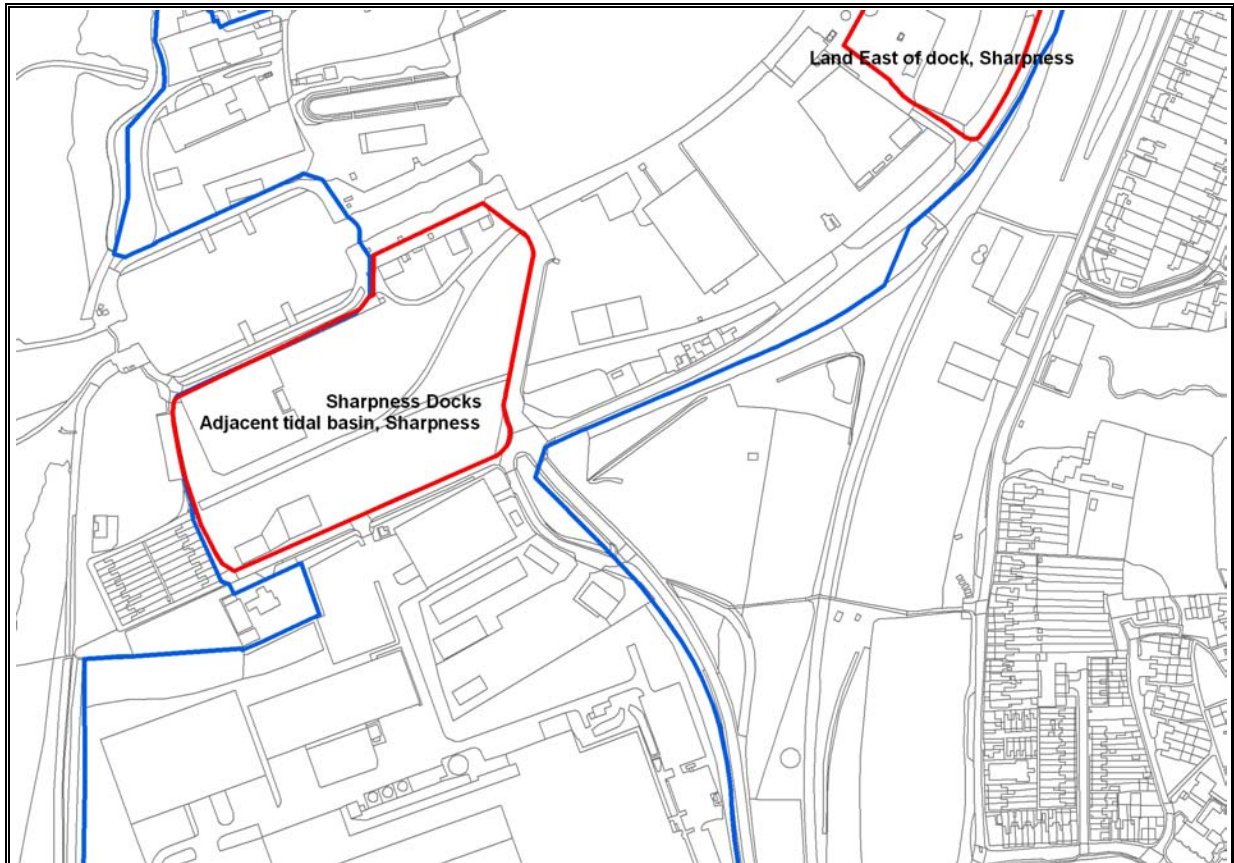
Site reference		EA3
Name		Sharpness Docks, Rear of Dock Road, Sharpness
Brownfield /Greenfield		Greenfield/brownfield
Owner		Canal and River Trust
Description		Brownfield/greenfield land between the docks and the river. Includes areas of woodland and the site of a former military base.
Size, ha		9.20
Site Development Constraints and Environmental Issues		Topography – Sloping Ground conditions – Assumed okay Trees on site, includes a military monument. Foundations/access roads for some previous buildings onsite Utilities – Available
Use	Existing	Primarily vacant/amenity woodland
	Previous	Military base
Location Type		Rural
Accessibility		Access via dock complex
Distance to M5 Motorway, km		17.7
Distance to A-road, km		6.7 – A38
Distance to Rail Station, km		13.7 – Cam and Dursley Station
Distance to Existing Bus Route, km		3.7 – Station Road

Distance to Services, km	4.7 – Berkeley local shops (Marybrook Street/Market Place)
Adjacent Land Uses	Area partly surrounds an existing factory/warehouse unit Dock infrastructure to the east Marina and clubhouse to the north River Severn main channel to the west Tracks and housing to the south
Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5) Also a waste allocation
Planning Issues	Sharpness Docks to the east (Policy TR11) North of site is in Floodplain (Zones 2 and 3, Policy GE4) and Conservation Area (Policies BE4-7, BE21 and NE11) River Severn is Nationally Important Wildlife Site (SSSI, NNR, Policies NE2, BE21)
Other information	Long term allocation which has seen little recent activity. Future development likely to be for port related uses only.
Serviced	No
Market availability	Not available
Likely development potential	Industrial – B2/B8
Availability, years	5+



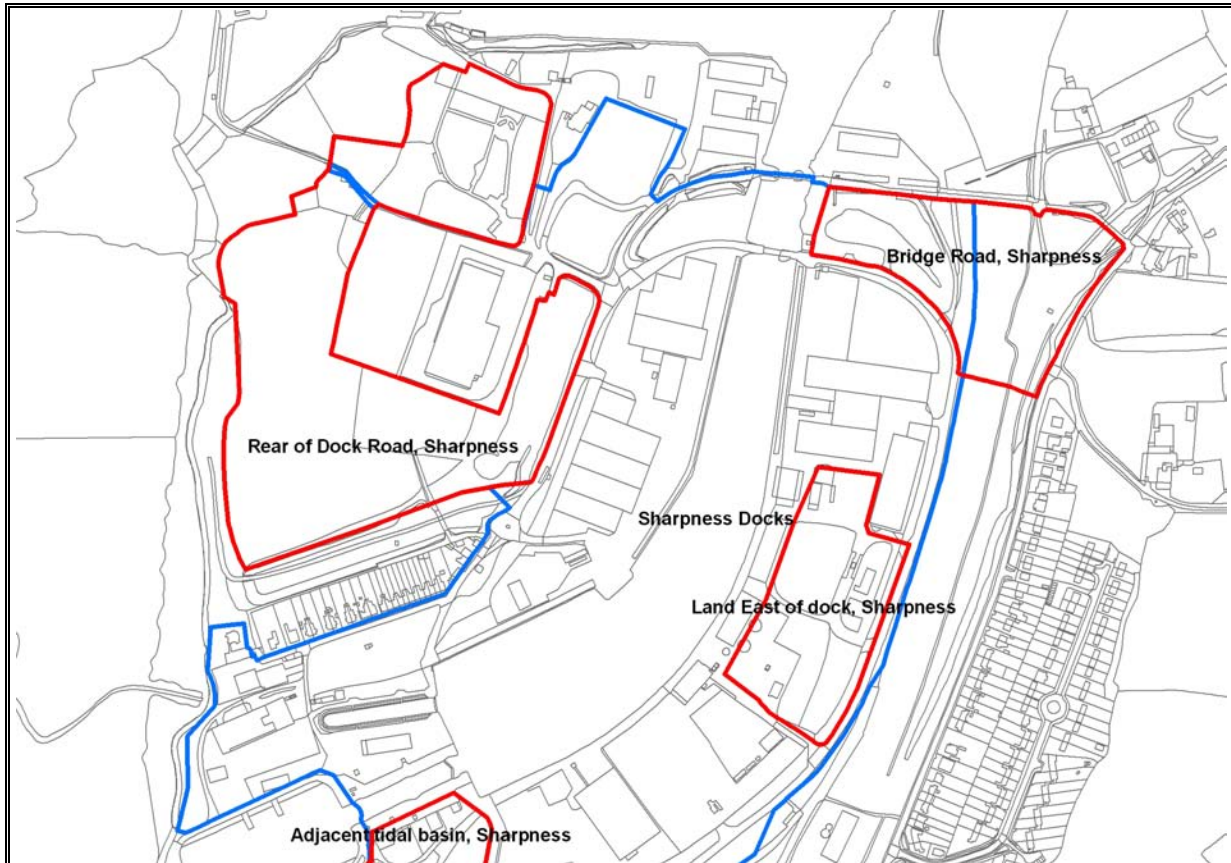
Site reference		EA4
Name		Sharpness Docks, Land East of Dock, Sharpness
Brownfield /Greenfield		Brownfield
Owner		Canal and River Trust (on a long lease to Victoria Group Holdings).
Description		Brownfield site within the secure dock area. In use for skip storage
Size, ha		2.80
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Possible contamination In flood risk area. Utilities – Available
Use	Existing	Skip storage
	Previous	Dock infrastructure
Location Type		Rural
Accessibility		Access via dock complex
Distance to M5 Motorway, km		17
Distance to A-road, km		6 – A38
Distance to Rail Station, km		13 – Cam and Dursley Station
Distance to Existing Bus Route, km		3 – Station Road
Distance to Services, km		4 – Berkeley local shops (Marybrook Street/Market Place)
Adjacent Land Uses		Within Sharpness Docks

	Area of woodland to the east
Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5) Within Sharpness Docks (Policy TR11) Key Wildlife Site in the north of the site (Policies NE3, BE21)
Planning Issues	West of site is in Floodplain (Zones 2 and 3, Policy GE4) Key Wildlife Site to the east (Policies NE3, BE21)
Other information	Long term allocation which has seen little recent activity. Future development likely to be for port related uses only.
Serviced	Yes
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	5+



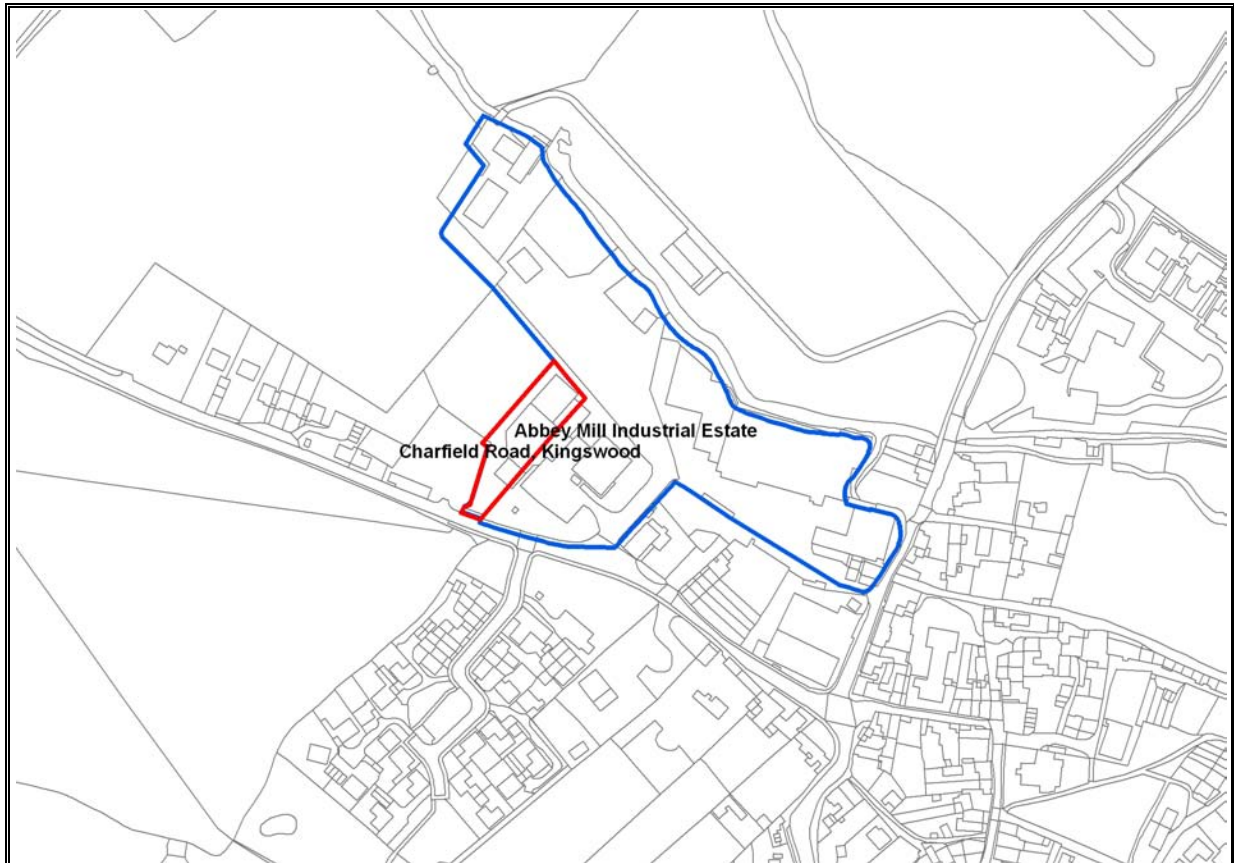
Site reference		EA5
Name		Sharpness Docks, Tidal Basin, Sharpness
Brownfield /Greenfield		Brownfield
Owner		Canal and River Trust
Description		Cleared brownfield site (former rail infrastructure). Includes Canal and River Trust workshop, water pumping station and small secure storage site.
Size, ha		4.00
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Possible contamination Power lines cross the site. Trees on site Includes the remains of dock infrastructure Partly in flood risk area Utilities – Available
Use	Existing	Uses include Canal and River Trust workshop, water pumping station and a small secure storage site. Bulk of site is vacant.
	Previous	Dock infrastructure
Location Type		Rural
Accessibility		Access available
Distance to M5 Motorway, km		16.7
Distance to A-road, km		5.7 – A38

Distance to Rail Station, km	12.7 – Cam and Dursley Station
Distance to Existing Bus Route, km	2.7 – Station Road
Distance to Services, km	3.7 – Berkeley local shops (Marybrook Street/Market Place)
Adjacent Land Uses	Within Sharpness Docks Housing and recreation space to the west Severn Distribution Park to the south
Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5) Within Sharpness Docks (Policy TR11)
Planning Issues	North of site is in Floodplain (Zones 2 and 3, Policy GE4) Key Wildlife Sites to the east (Policies NE3, BE21)
Other information	Long term allocation which has seen little recent activity. Future development likely to be for port related uses only.
Serviced	Yes
Market availability	Not available
Likely development potential	Industrial– B2/B8
Availability, years	5+



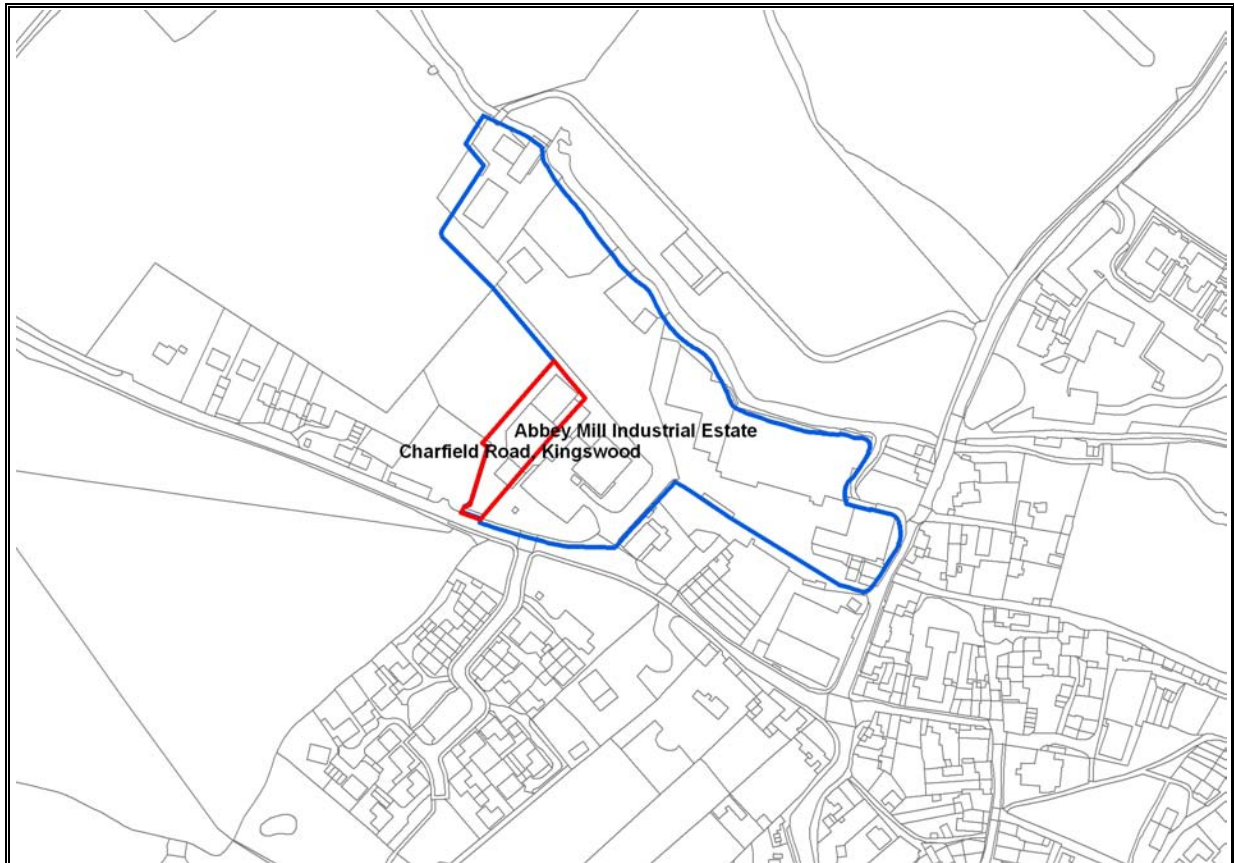
Site reference		EA6
Name		Sharpness Docks, Land between Bridge Road and Oldminster Road, Sharpness
Brownfield /Greenfield		Brownfield/greenfield
Owner		Canal and River Trust (on a long lease to Victoria Group Holdings).
Description		Brownfield/greenfield land. West is in use for open storage, east extends into woodland.
Size, ha		3.40
Site Development Constraints and Environmental Issues		Topography – Sloping in the east Ground conditions – Possible contamination Partly in woodland. Utilities – Available
Use	Existing	West of site in use for open storage, east is woodland
	Previous	Dock infrastructure (including railway)
Location Type		Rural
Accessibility		Access via dock complex
Distance to M5 Motorway, km		17.8
Distance to A-road, km		6.8 – A38
Distance to Rail Station, km		13.8 – Cam and Dursley Station
Distance to Existing Bus Route, km		3.8 – Station Road
Distance to Services, km		4.8 – Berkeley local shops (Marybrook Street/Market Place)

Adjacent Land Uses	Partly within Sharpness Docks Area of woodland to the south Agriculture to the north Housing, nursing home and agriculture to the east
Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5) Partly within Sharpness Docks (Policy TR11) West of site is part of a waste allocation
Planning Issues	Key Wildlife Site to the south (Policies NE3, BE21) Conservation Area to the north (Policies BE4-7, BE21 and NE11)
Other information	Long term allocation which has seen little recent activity. Future development likely to be for port related uses only.
Serviced	No
Market availability	Not available
Likely development potential	Industrial – B2/B8
Availability, years	5+



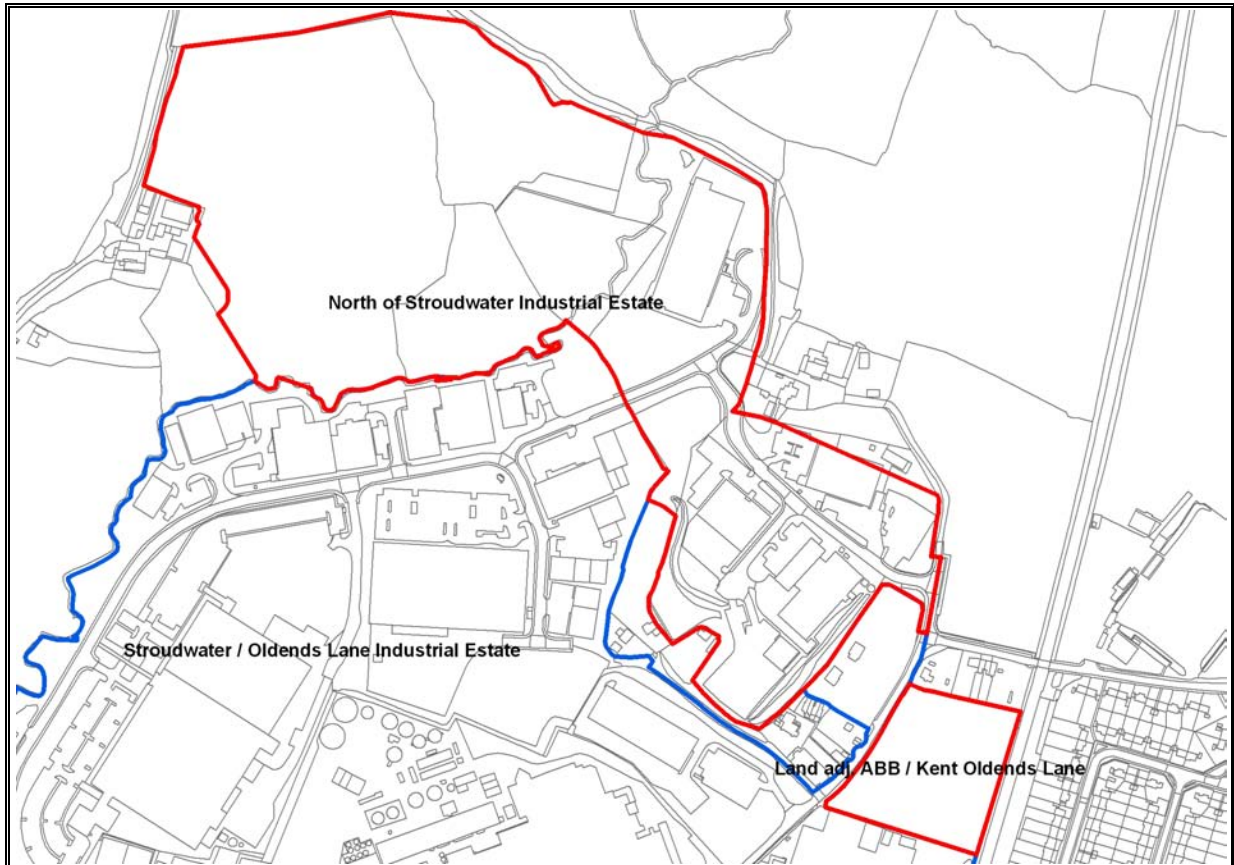
Site reference		EA7
Name		Land off Charfield Road, Kingswood
Brownfield /Greenfield		Greenfield
Owner		FTC South West
Description		Developed for three terraced industrial units
Size, ha		0.30
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Utilities – Available
Use	Existing	Developed for three terraced industrial units
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		Access in place
Distance to M5 Motorway, km		7
Distance to A-road, km		7 – A4135 Whiteway (similar distance to A38)
Distance to Rail Station, km		12 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km		On bus route (Charfield Road)
Distance to Services, km		0.1 – Kingswood local shops (High Street)
Adjacent Land Uses		Abbey Mill Industrial Estate to the north and east Housing/agriculture to the west and south
Planning Policy Status		Developed site

	Part of Abbey Mill Industrial Estate (Policy EM3)
Planning Issues	-
Other information	-
Serviced	Yes
Market availability	Not available
Likely development potential	Industrial – B1(c)/B2/B8
Availability, years	0-1



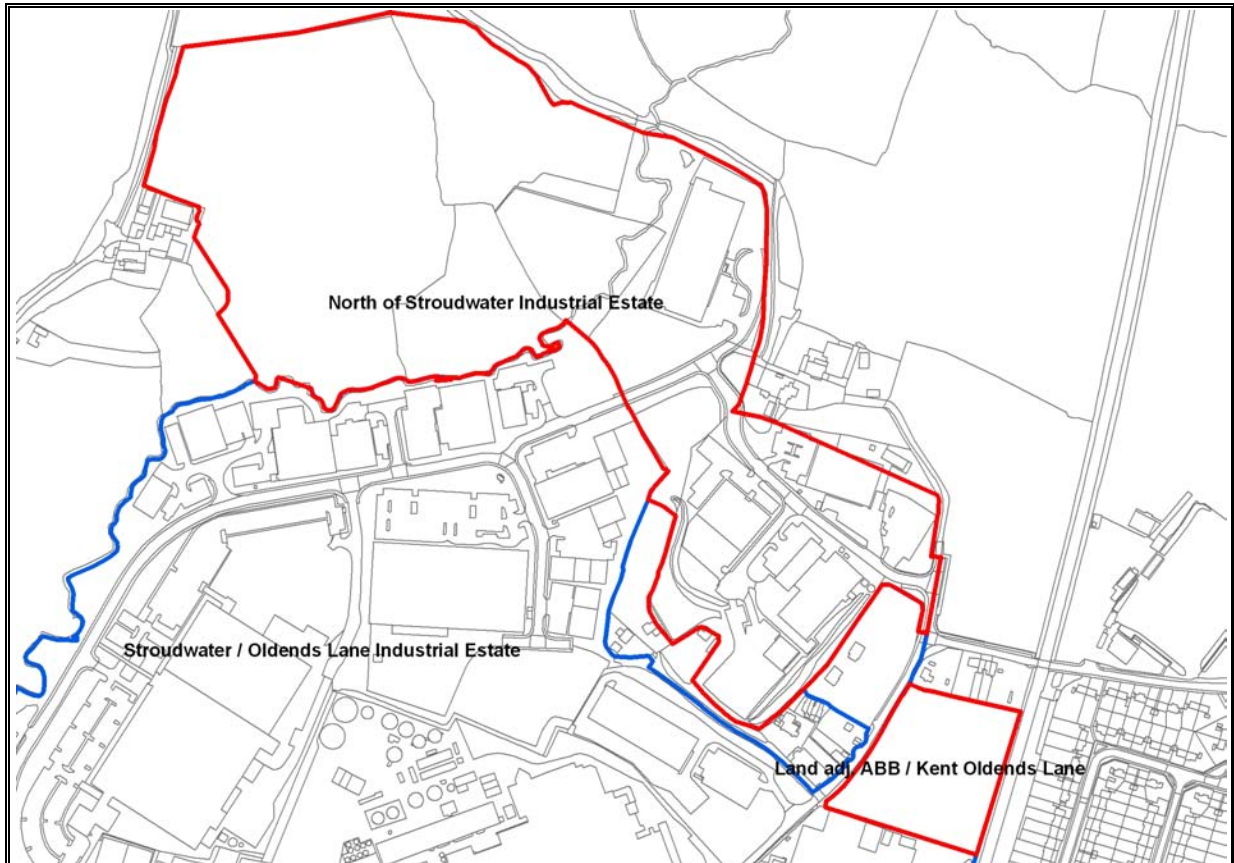
Site reference		EA7
Name		Land off Charfield Road, Kingswood
Brownfield /Greenfield		Greenfield
Owner		FTC South West
Description		Developed for three terraced industrial units
Size, ha		0.30
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Utilities – Available
Use	Existing	Developed for three terraced industrial units
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		Access in place
Distance to M5 Motorway, km		7
Distance to A-road, km		7 – A4135 Whiteway (similar distance to A38)
Distance to Rail Station, km		12 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km		On bus route (Charfield Road)
Distance to Services, km		0.2 – Kingswood local shops (High Street)
Adjacent Land Uses		Abbey Mill Industrial Estate to the north and east Housing/agriculture to the west and south
Planning Policy Status		Developed site

	Part of Abbey Mill Industrial Estate (Policy EM3)
Planning Issues	-
Other information	-
Serviced	Yes
Market availability	Not available
Likely development potential	Industrial – B1(c)/B2/B8
Availability, years	0-1



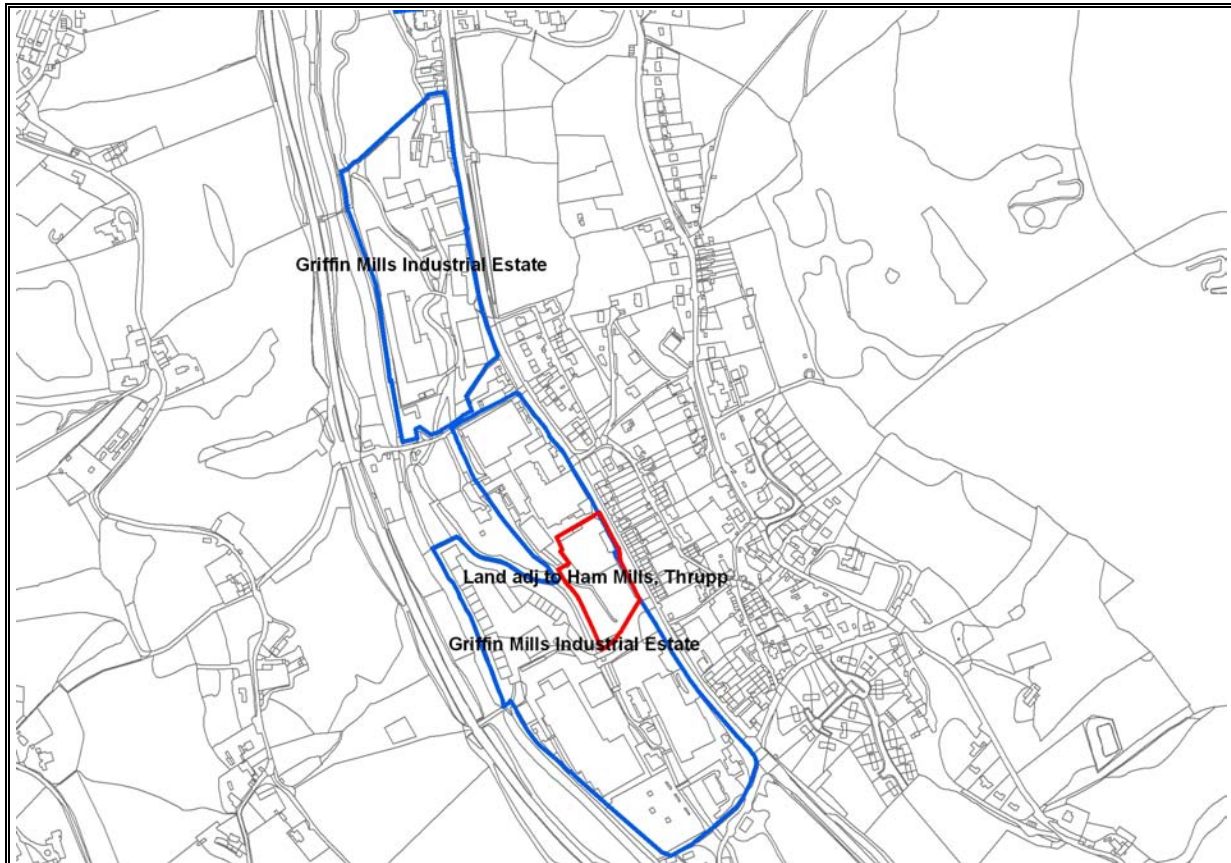
Site reference		EA9
Name		North of Stroudwater Industrial Estate, Stonehouse
Brownfield /Greenfield		Greenfield
Owner		Gloucestershire County Council and Schlumberger
Description		West is greenfield agricultural land. East has been developed for multiple employment uses, including accommodation for Schlumberger
Size, ha		9.00
Site Development Constraints and Environmental Issues		Topography – Uneven Ground conditions – Okay Partly in flood risk area. Utilities – Available
Use	Existing	Developed for three terraced industrial units
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		Access requirements include the need to bridge a watercourse
Distance to M5 Motorway, km		3
Distance to A-road, km		1 – A419 Bristol Road
Distance to Rail Station, km		3 – Stonehouse Station
Distance to Existing Bus Route, km		A bus route passes through the area (Oldends Lane)
Distance to Services, km		2 – Stonehouse Town Centre

Adjacent Land Uses	Stroudwater Industrial Estate to the south Housing/agriculture elsewhere
Planning Policy Status	East is developed site West is allocated for B1/B2/B8 (Policy EM5)
Planning Issues	Includes an area in Floodplain (Zones 2 and 3, Policy GE4) Stroudwater Industrial Estate to the south (Policy EM3)
Other information	GCC have previously marketed the remaining land, but a combination of access costs (the need to bridge a watercourse) and topography mean that a purely employment development is not viable. GCC are now considering other options including a grant funding bid for access. May also look to develop this site alongside the adjacent Sustainable Urban Extension (SUE) proposal. This would see this site developed for a mix of uses (including some housing) while 10.5 ha of employment land is provided across the wider SUE.
Serviced	Yes (in part)
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	3-5



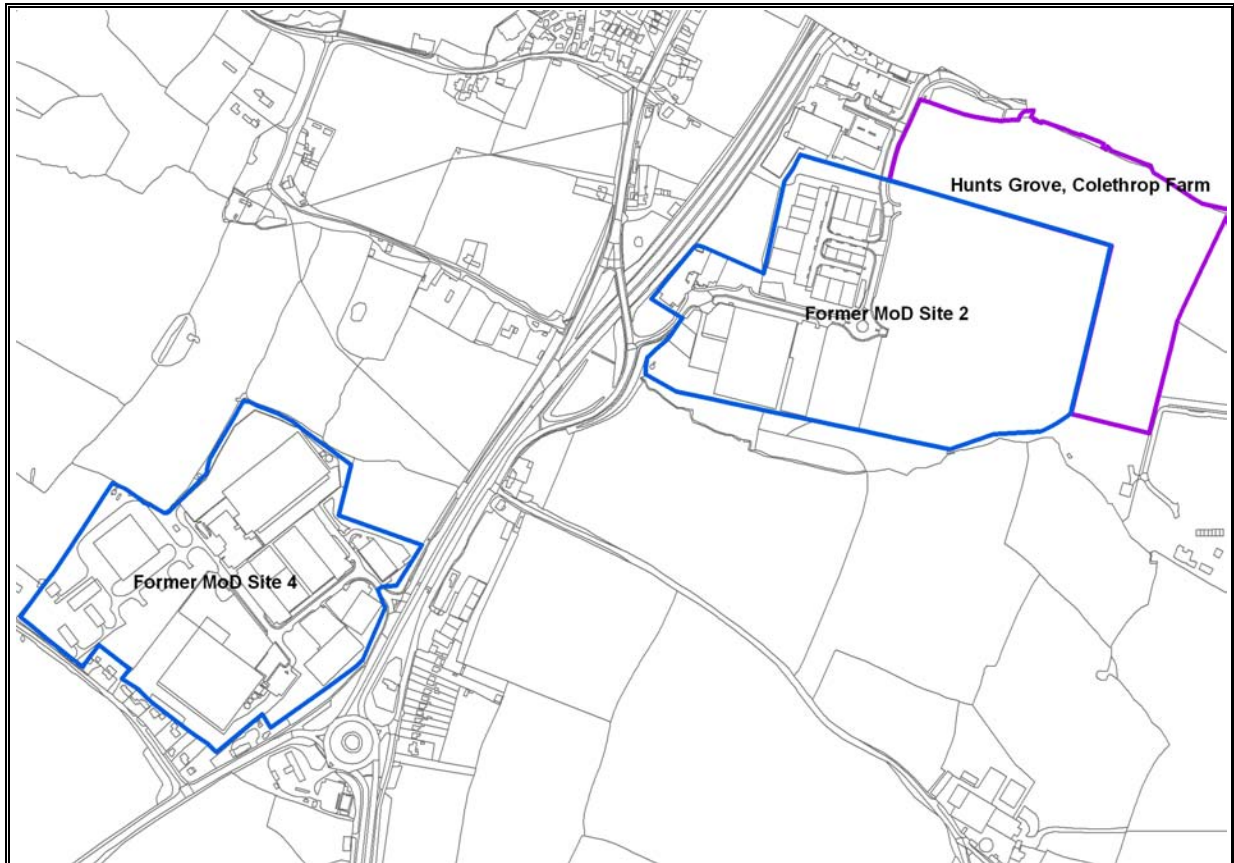
Site reference		EA11
Name		Land adj. ABB Kent-Taylor, Oldends Lane, Stonehouse
Brownfield /Greenfield		Greenfield
Owner		ABB
Description		Vacant greenfield site.
Size, ha		1.40
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Utilities – Available
Use	Existing	Vacant
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		New access required
Distance to M5 Motorway, km		2.6
Distance to A-road, km		1.6 – A419 Bristol Road
Distance to Rail Station, km		2.6 – Stonehouse Station
Distance to Existing Bus Route, km		A bus route passes through the area (Oldends Lane)
Distance to Services, km		2 – Stonehouse Town Centre
Adjacent Land Uses		Stroudwater Industrial Estate to the south and west Housing to the north Rail line to the east

Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5)
Planning Issues	Stroudwater Industrial Estate to the south and west (Policy EM3)
Other information	Being held as expansion land.
Serviced	No
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	5+



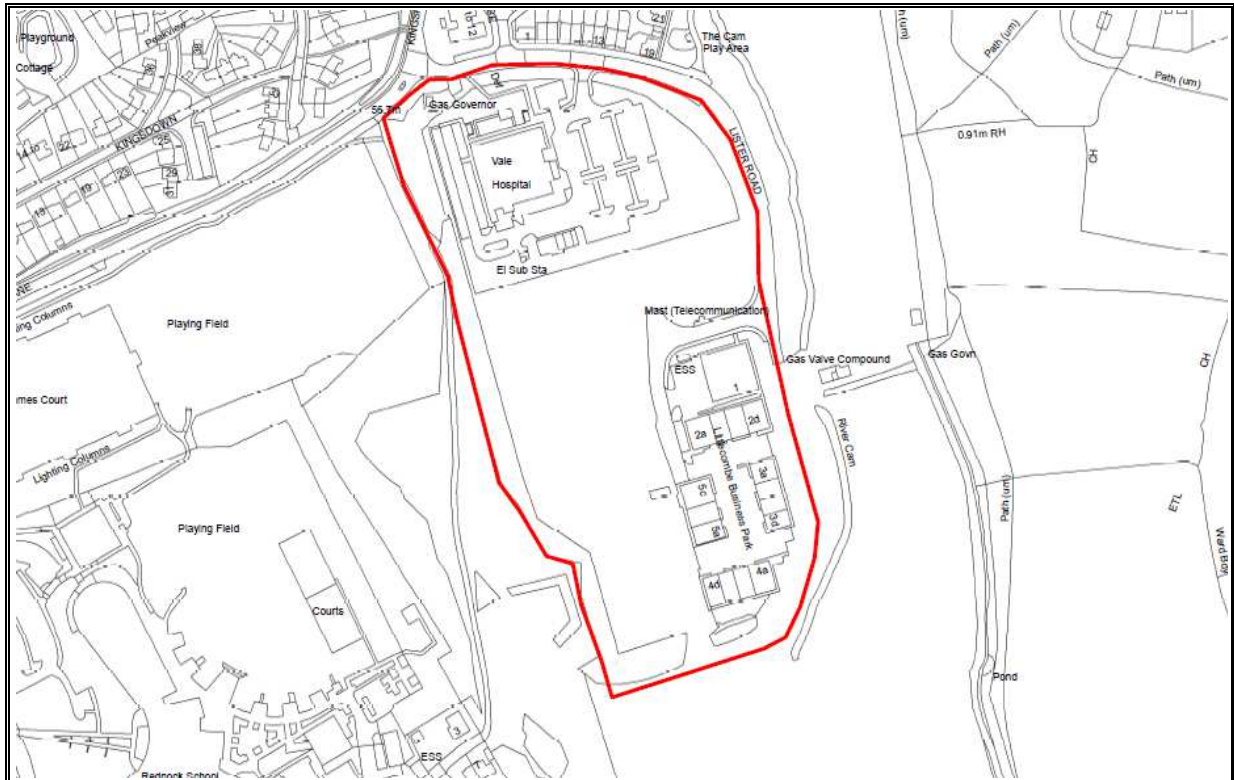
Site reference		EA12
Name		Land adj. Ham Mills, A419 London Road, Thrupp
Brownfield /Greenfield		Brownfield
Owner		Stroud Corporation NV
Description		Vacant, wooded brownfield site at entrance to existing industrial estate.
Size, ha		0.60
Site Development Constraints and Environmental Issues		Topography – Uneven Ground conditions – Not known Trees on site. In flood risk area Utilities – Available
Use	Existing	Vacant
	Previous	Industrial
Location Type		Urban Area
Accessibility		Accessed through existing industrial estate.
Distance to M5 Motorway, km		10.4
Distance to A-road, km		Off the A419 London Road
Distance to Rail Station, km		2.4 – Stroud Station
Distance to Existing Bus Route, km		On bus route (London Road)
Distance to Services, km		2 – Stroud Town Centre
Adjacent Land Uses		Within Griffin Mills Industrial Estate South (Phoenix

	Industrial Estate) Housing to the north east
Planning Policy Status	Allocated for B1/B2/B8 (Policy EM5)
Planning Issues	Within Griffin Mills Industrial Estate South (Phoenix Industrial Estate) (Policy EM3) In a Conservation Area (Policies BE4-7, BE21 and NE11) Includes an area in Floodplain (Zones 2 and 3, Policy GE4)
Other information	Part of a larger investment ownership. No identified development plans.
Serviced	No
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	5+



Site reference		MU1
Name		Hunts Gove, Colethrop Farm, Hardwicke
Brownfield /Greenfield		Greenfield
Owner		St Modwen
Description		L-shaped, vacant greenfield site
Size, ha		5.75
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Utilities – Available
Use	Existing	Vacant
	Previous	Agriculture
Location Type		Urban Fringe
Accessibility		Access point in place
Distance to M5 Motorway, km		2
Distance to A-road, km		0.6 – A38
Distance to Rail Station, km		0.1 – Stonehouse Station (similar distance to Gloucester Station)
Distance to Existing Bus Route, km		0.1 – A38
Distance to Services, km		1.2 – Petrol filling station and convenience store off Cross Keys Roundabout.
Adjacent Land Uses		Various business park accommodation to the south, west and north (properties to the north are in Gloucester City)

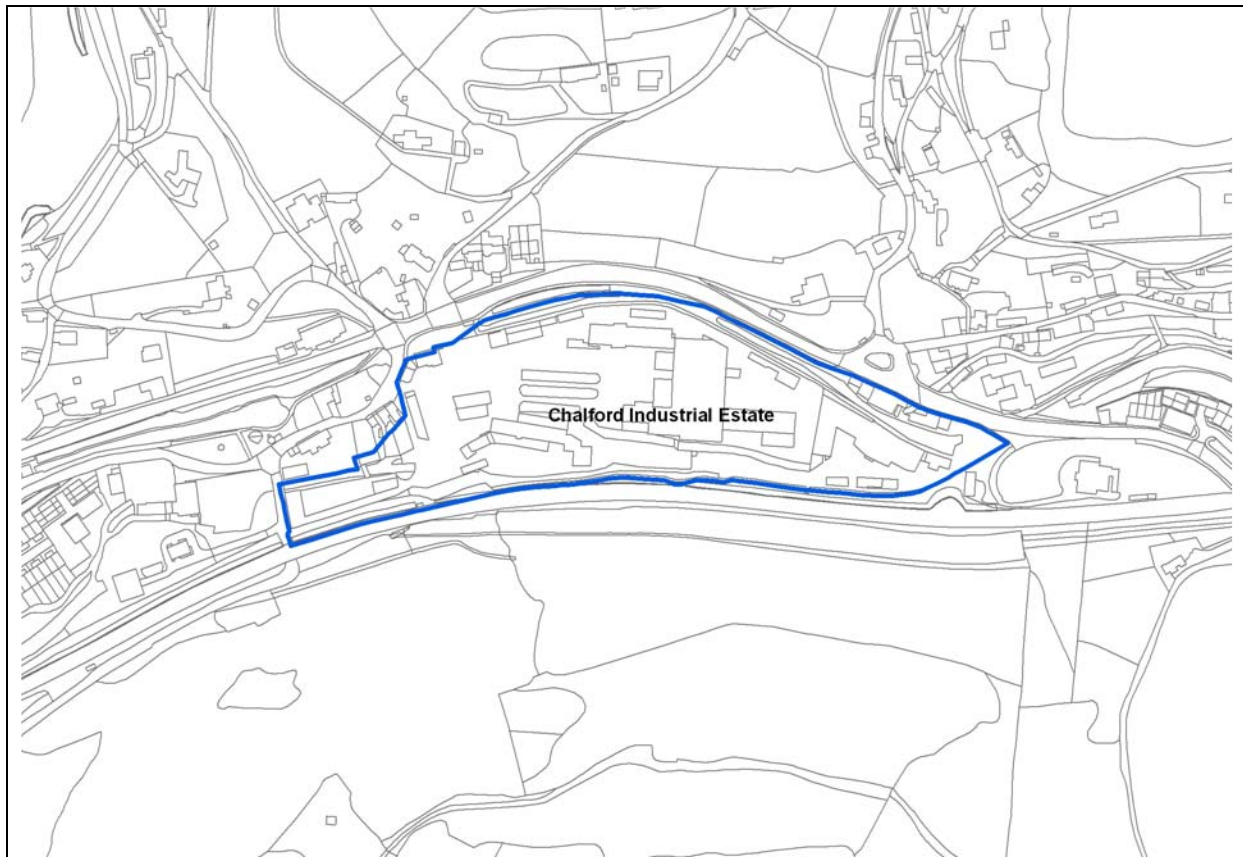
	Agriculture to the east
Planning Policy Status	Outline planning consent for 20,439 sqm of B1/B2/B8 accommodation.
Planning Issues	Adjacent to Former MoD Site 2 (Gateway 12), Quedgeley (Policy EM3)
Other information	The land is on the market for design and build options of 465 sqm, or more. Site configuration prevents the development of larger B8 warehouses. However, adjustments to the site boundary, with the neighbouring employment area, may be possible to accommodate the needs of a larger employer.
Serviced	No
Market availability	Available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	1-3



Site reference		MU3
Name		Land at Lister Petter, Long Street, Dursley
Brownfield /Greenfield		Brownfield
Owner		St Modwen
Description		Vacant brownfield site, part of a larger, mixed-use scheme (residential, hospital and employment).
Size, ha		1.70
Site Development Constraints and Environmental Issues		Topography – Flat Ground conditions – Okay Utilities – Available
Use	Existing	Vacant
	Previous	Industrial
Location Type		Urban Fringe
Accessibility		Partly delivered
Distance to M5 Motorway, km		3.4
Distance to A-road, km		0.3 – A4135 Kingshill Road
Distance to Rail Station, km		4 – Cam and Dursley Station
Distance to Existing Bus Route, km		0.4 – A4135 Kingshill Road
Distance to Services, km		1 – Dursley Town Centre
Adjacent Land Uses		Housing, recreation space, school and hospital to the north, west and south Agriculture to the east
Planning Policy Status		Various planning consents
Planning Issues		Includes an area in Floodplain (Zones 2 and 3, Policy GE4)

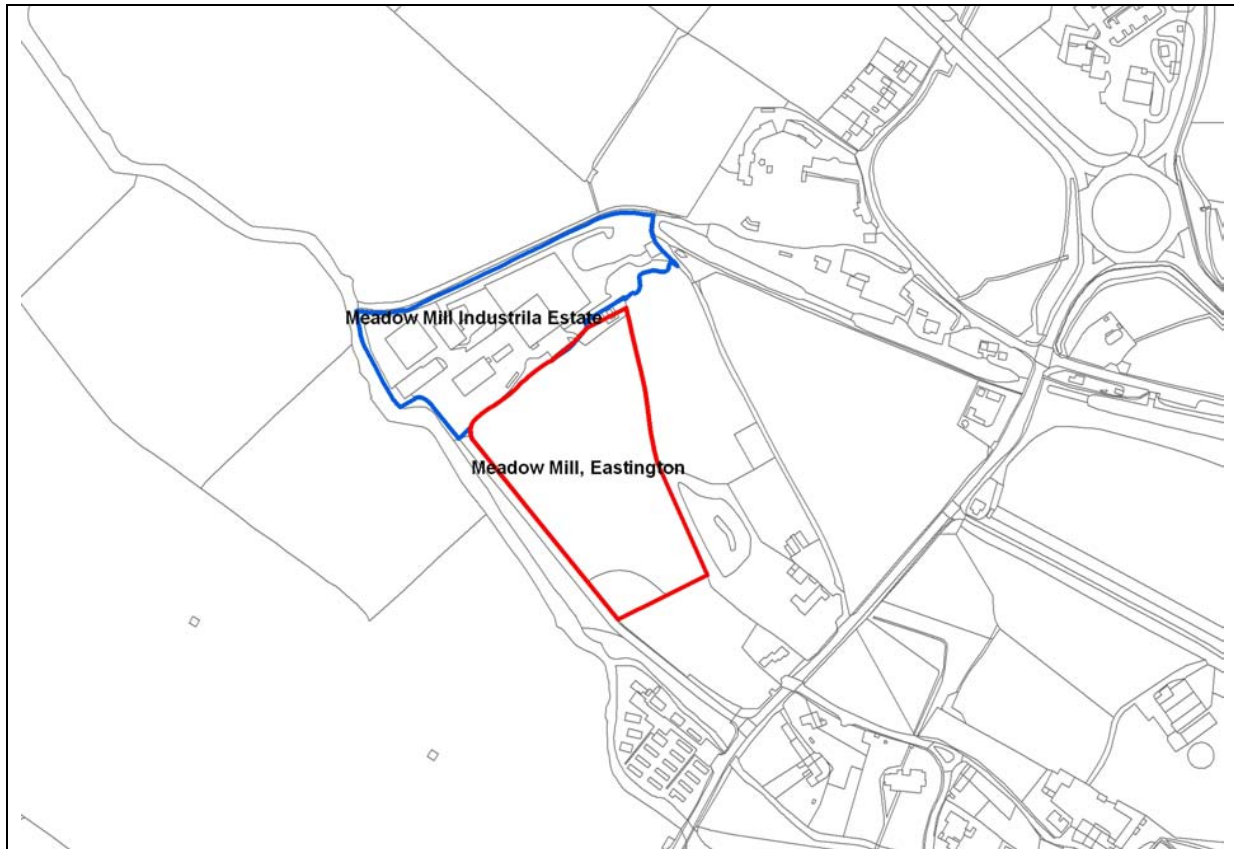
	Proposed cycle route passes through the site (Policy TR4) Protected Outdoor Play Area to the west (Policy RL1)
Other information	The remaining employment land is likely to be taken up by the relocation of Lister Shearer. Land at this location is may also accommodate a second large local employer (Lister Petter). At present progress (across the wider mixed-use scheme) is being inhibited by an application for a village green which, if implemented, would make delivery of the access road difficult.
Serviced	Yes
Market availability	Not available
Likely development potential	Industrial/office – B1/B2/B8
Availability, years	1-3

APPENDIX 9 EMPLOYMENT AREA PROFORMAS



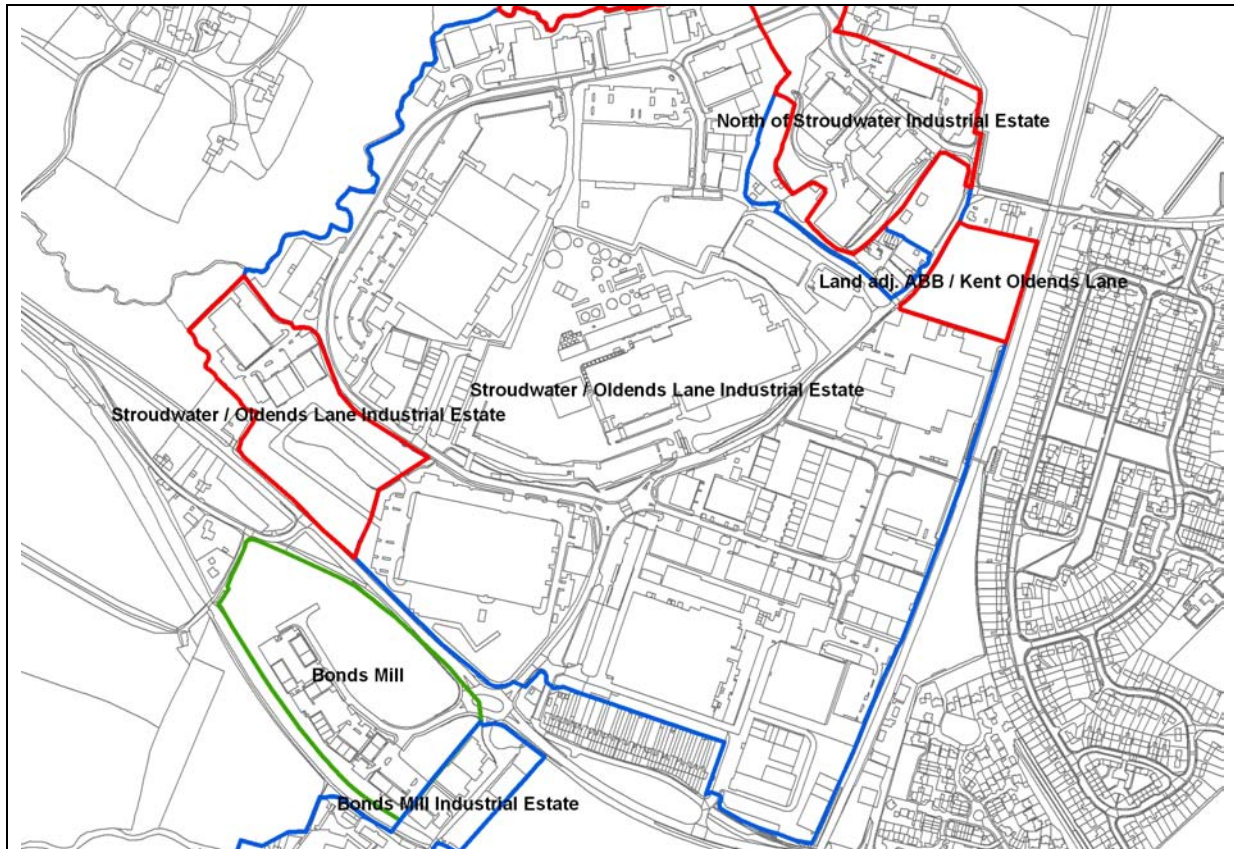
Area Reference	EM3, Site EK1
Name	Chalford Industrial Estate, Chalford
Description	Established, moderate quality industrial estate comprising a range of older stone built properties, a sub-divided mill and areas of open storage, bounded by the River Frome and Thames/Severn Canal.
Occupier(s)	Multiple - Including Huber
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	3.62
Building Age	Mostly pre 1945
Building Quality	Low to moderate
Access Constraints	Access off the A419 London Road is constrained by tight turns which limited HGV access.
Distance to M5 Motorway, km	14
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	6 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	2 – Bussage Local Shopping Area
Car Parking	Moderate - Private parking in front of most units, but high levels of informal parking evident in open storage areas.
Constraints	In Conservation Area. Some historic properties may be listed. In flood risk area Trees in the area
Critical Mass	Yes

Opportunities for redevelopment/ expansion	<p>Most land and property appears to be in use. While the refurbishment of some properties may be possible, options for redevelopment will be constrained by the historic nature of many of the buildings (protected though Conservation Area, and possibly, Listed Building status).</p> <p>Opportunities for expansion are limited by adjacent waterways and the fact that the Industrial Estate sits in a narrow valley bottom.</p>
Other Information	-
Recommendations	<p>Although some property in the estate is of low quality, the area remains useful source of budget/moderate quality accommodation to occupiers in the Stroud Valleys. The estate is almost fully occupied and most land and property is in use.</p> <p>The industrial estate should therefore be retained and protected as an established local employment area.</p>



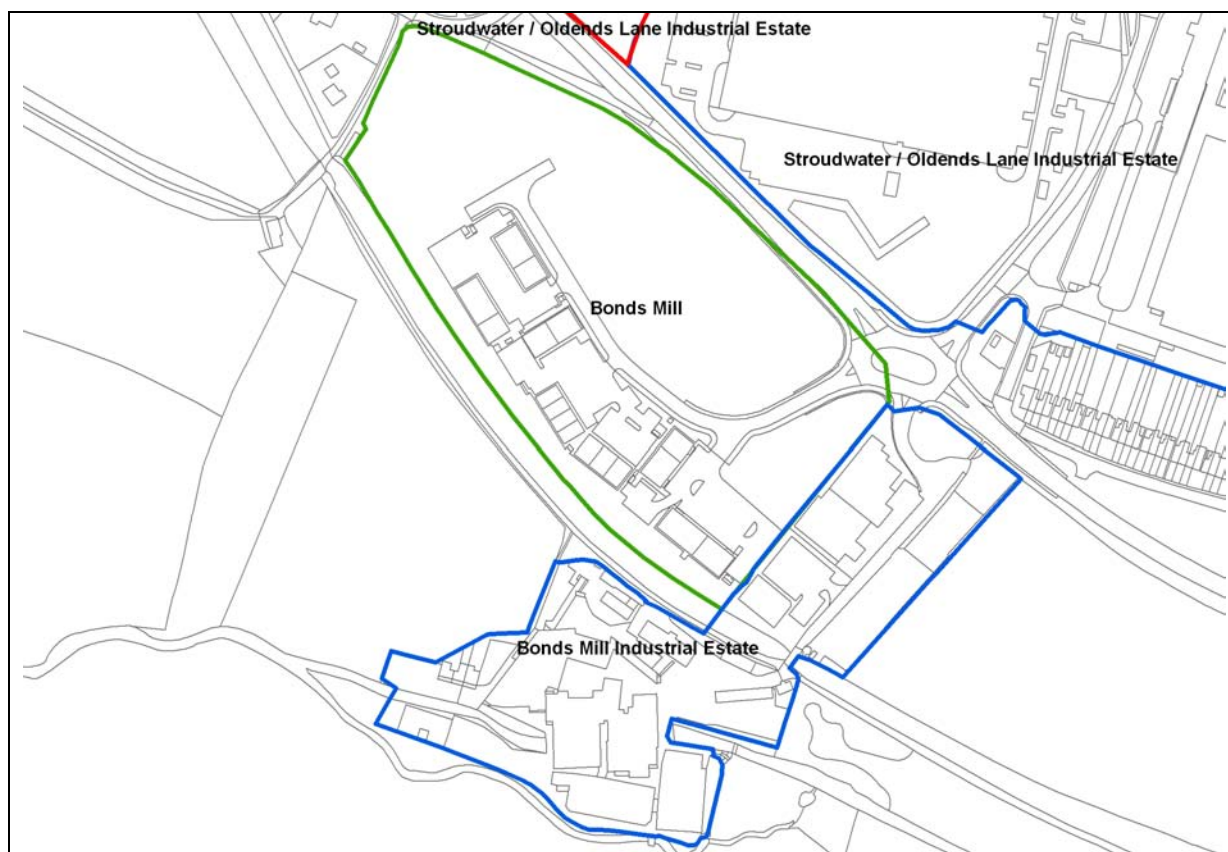
Area Reference	EM3, Site EK2
Name	Meadow Mill Industrial Estate (Eastington Trading Estate), Eastington
Description	Small rural industrial estate, comprising a mix of mostly budget quality industrial premises, fronted by greenfield expansion land.
Occupier(s)	Multiple – Including ARC Energy Resources.
Prominence	Poor
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	4.10
Building Age	Mixed
Building Quality	Low to moderate
Access Constraints	None
Distance to M5 Motorway, km	2
Distance to A-road, km	1 – (A419)
Distance to Rail Station, km	4 – Stonehouse Station
Distance to Existing Bus Route, km	0.3 – Spring Hill
Distance to Services, km	4 – Stonehouse Town Centre
Car Parking	Good - Private parking available at most units
Constraints	In Conservation Area. In a key wildlife site In flood risk area Trees in the area
Critical Mass	Yes

<p>Opportunities for redevelopment/ expansion</p>	<p>There is 2.20 ha of undeveloped employment land fronting the Trading Estate (Site EA2: <i>'Meadow Mill, Eastington'</i>). Although there are no present plans to bring this site forward, it remains available to meet future needs.</p> <p>The ARC Energy building provides future opportunities for refurbishment should it no longer meet the needs of the occupier. Elsewhere land and property appears in reasonable condition and well occupied. Further growth (beyond Site EA2) is constrained by surrounding areas of ecological value.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Although some property in the estate is of low quality, the area provides accommodation for several of the District's mid-sized employers. The industrial estate should therefore be retained and protected as an established local employment area.</p> <p>Site EA2 may not come forward in the short/medium term but could meet long term growth requirements or the needs of an individual occupier. The land should therefore be protected from alternative uses.</p>



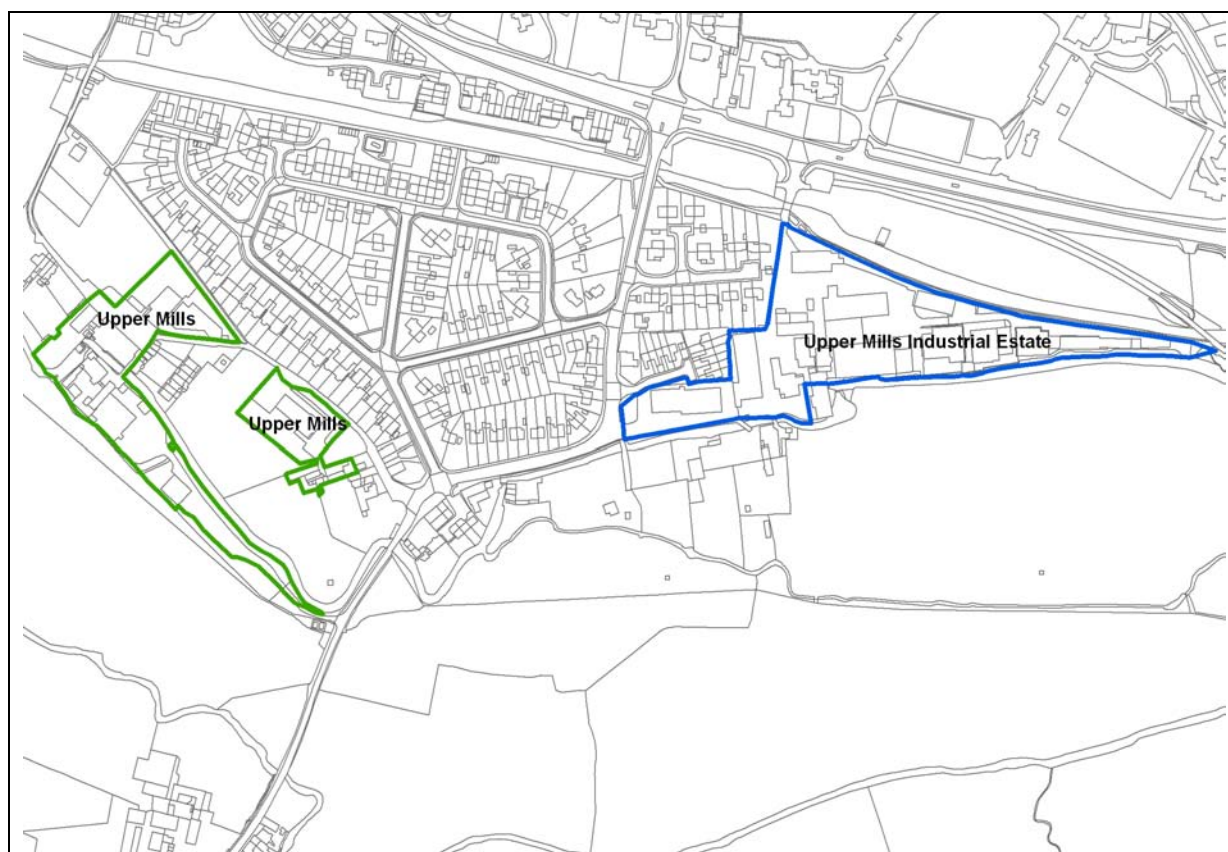
Area Reference	EM3, Site EK3
Name	Stroudwater/Oldends Lane Industrial Area (Stroudwater Industrial Estate), Stonehouse
Description	Good quality greenfield business park, on a main road location close to Junction 13, M5
Occupier(s)	Multiple – a focus for major employers including Dairy Crest, Delphi Diesel and Schlumberger
Prominence	High
Current Use (Use Classes)	B1(a, c)/B2/B8
Size, ha	60.53
Building Age	Mostly modern (including some new)
Building Quality	Good
Access Constraints	None
Distance to M5 Motorway, km	2
Distance to A-road, km	Fronts A419 Bristol Road
Distance to Rail Station, km	2 – Stonehouse Station
Distance to Existing Bus Route, km	A bus route passes through the area (Oldends Lane)
Distance to Services, km	1 – Stonehouse Town Centre
Car Parking	Good – Parking available in front of most units
Constraints	Flood risk area in west/north west Conservation Area/key wildlife site to the south Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/expansion	There is 10.40 ha of undeveloped greenfield land within the area, comprising two adjacent allocated expansion sites. There are also options to link development here to a SUE proposal. These are discussed further in Sections 6.0 and 12.0 in the main report.
Other Information	-

Recommendations	<p>The premier business park for Stroud District, providing accommodation for many of the District's major employers. Discussions with several of those occupiers suggest broad satisfaction with their existing premises and no significant plans for change (see Section 9.0). It is also a key local source of modern, good quality industrial units, which can meet the needs of expanding small and medium sized firms.</p> <p>Stroudwater Industrial Estate also has significant greenfield expansion land. However, the bulk of this supply is constrained and Stroud District Council and Gloucestershire County Council (the primary landowner) will need to work together to overcome these constraints. If the identified constraints cannot be overcome then other expansion options will need to be considered on greenfield land to the north and west of the existing estate.</p>
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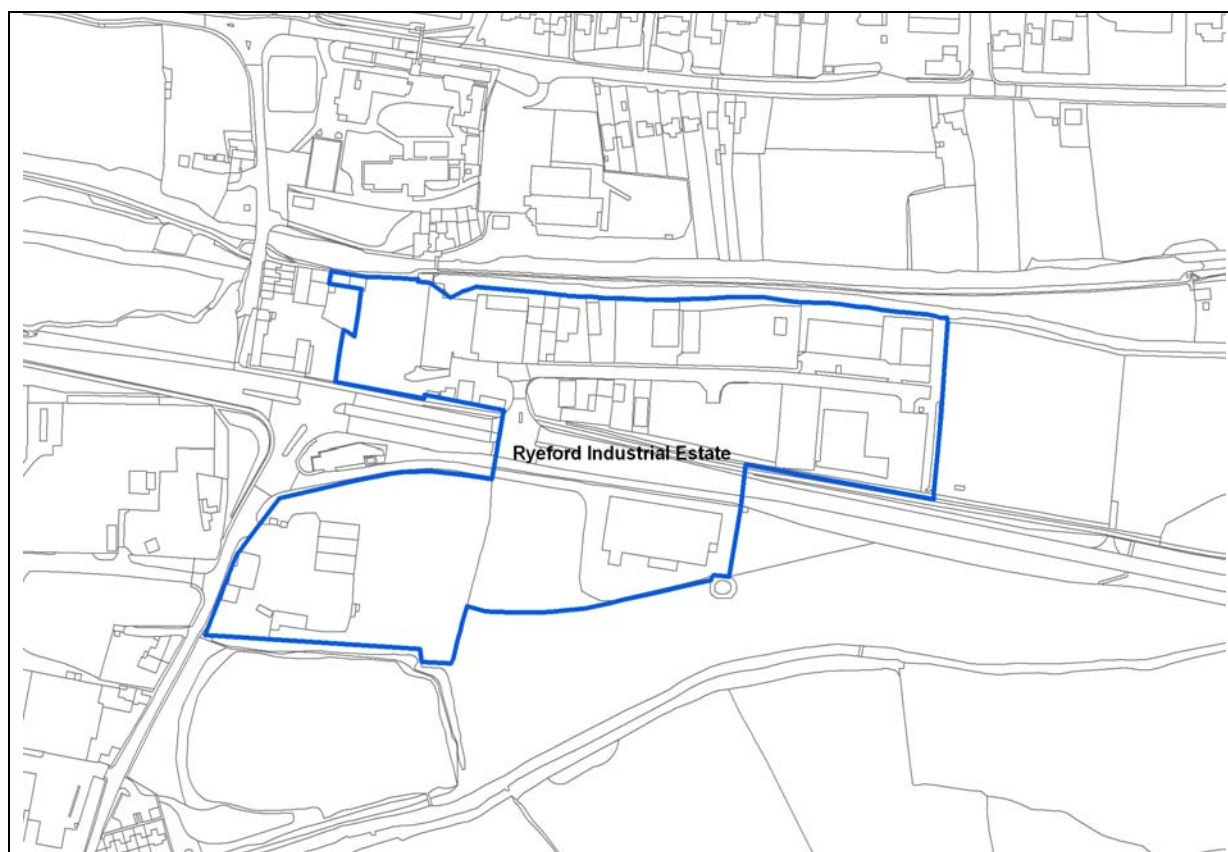
Area Reference	EM3, Site EK4
Name	Bonds Mill Industrial Estate, Bristol Road, Stonehouse
Description	Sub-divided, dense former mill complex providing a range of good quality workspace on a canal side location. Also includes several larger industrial units close to the A419 Bristol Road frontage.
Occupier(s)	Multiple – Including Anstec and Ware (Glos)
Prominence	Low (most accommodation in backland locations)
Current Use (Use Classes)	A3, B1(a, c), B2, B8
Size, ha	3.32
Building Age	Mostly pre 1945
Building Quality	Mostly high (some properties have been recently refurbished and expanded)
Access Constraints	Access road is narrow in places, particularly when crossing the canal.
Distance to M5 Motorway, km	2
Distance to A-road, km	Fronts A419 Bristol Road
Distance to Rail Station, km	2 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	1 – Stonehouse Town Centre
Car Parking	Moderate – The dense nature of the area means that only limited parking can be provided for each unit.
Constraints	Partly in Conservation Area Partly in flood risk area Key wildlife sites adjacent Canal side footpath passes through the area Some historic properties may be listed.
Critical Mass	Yes

Opportunities for redevelopment/ expansion	A dense employment area. Most land and property appears to be in use, while refurbishment of much of the older mill premises has already taken place.
Other Information	-
Recommendations	Successful local employment area, providing a range of smaller office, workshop and storage units for start-up and micro businesses. The industrial estate should be retained and protected as an established local employment area.



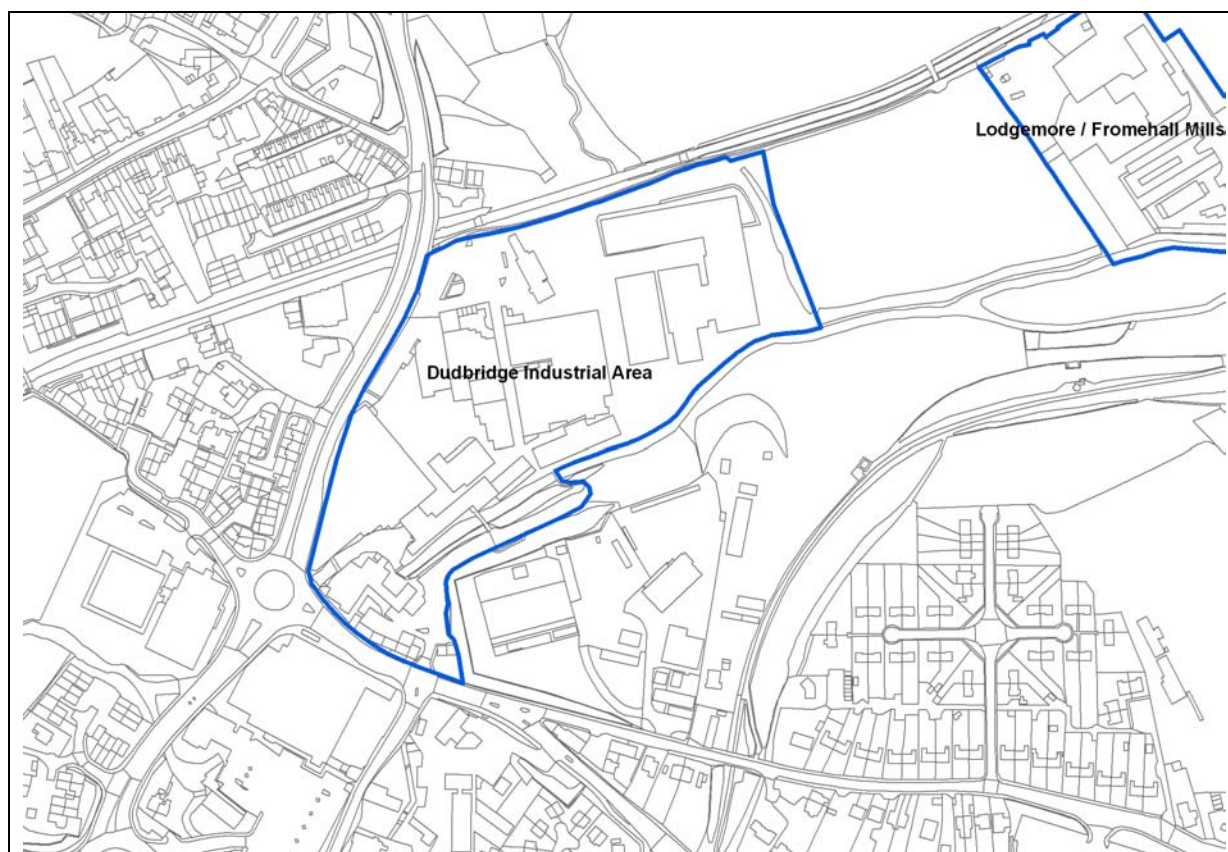
Area Reference	EM3, Site EK5
Name	Upper Mills Industrial Estate, Bristol Road, Stonehouse
Description	Small, linear industrial estate in an edge of settlement location.
Occupier(s)	Multiple – Including Roots Systems
Prominence	Low
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	2.47
Building Age	Modern
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	3
Distance to A-road, km	Off the A419 Bristol Road
Distance to Rail Station, km	1 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	0.5 – Stonehouse Town Centre
Car Parking	Moderate – Parking available in front of some units, additional communal parking available in the north of the area.
Constraints	In flood risk area Most of the Industrial Estate is within a Conservation Area Key wildlife site to the south Housing to the west
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Dense industrial estate with all land and premises in use. The units are modern, providing no opportunities for refurbishment. Further growth of the area is prevented by surrounding uses, including land of ecological value to the south.
Other Information	-

Recommendations	The industrial estate provides good quality industrial accommodation to local employers and should be protected.
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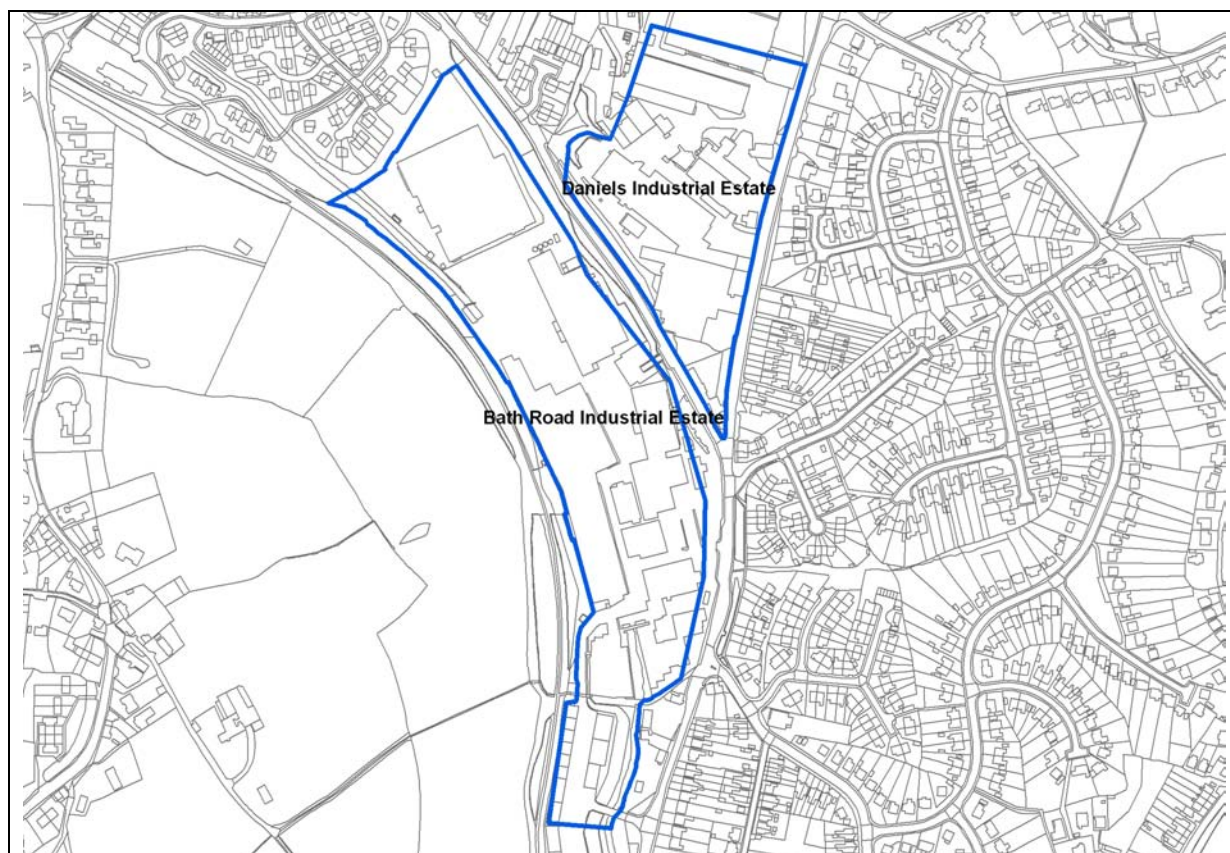
Area Reference	EM3, Site EK6
Name	Ryeford Industrial Area, Stonehouse
Description	Budget quality industrial estate, accessed by unsurfaced roads and dominated by trade uses.
Occupier(s)	Multiple – Including Kelloway Building Supplies and Automold (south of A419).
Prominence	High
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	5.70
Building Age	Post-1960
Building Quality	Low to Moderate
Access Constraints	Estate roads are largely unsurfaced
Distance to M5 Motorway, km	4
Distance to A-road, km	Fronts A419 Bristol Road
Distance to Rail Station, km	1 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Bristol Road).
Distance to Services, km	1 – Stonehouse Town Centre
Car Parking	Moderate – Some private parking available at all units
Constraints	In flood risk area In a Conservation Area Surrounded by key wildlife site Housing/school to the north Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Dense industrial estate with all land and premises in use. Some units may provide future opportunities for refurbishment. Further growth of the area is prevented by surrounding uses, including land of ecological value.
Other Information	-

Recommendations	Despite unsurfaced roads and the low quality of some units the scheme performs well, providing budget quality unit (primarily) to local trade companies. It should therefore be protected for employment uses. Any future proposals for regeneration should look to improve access and circulation roads. Expansion options are limited.
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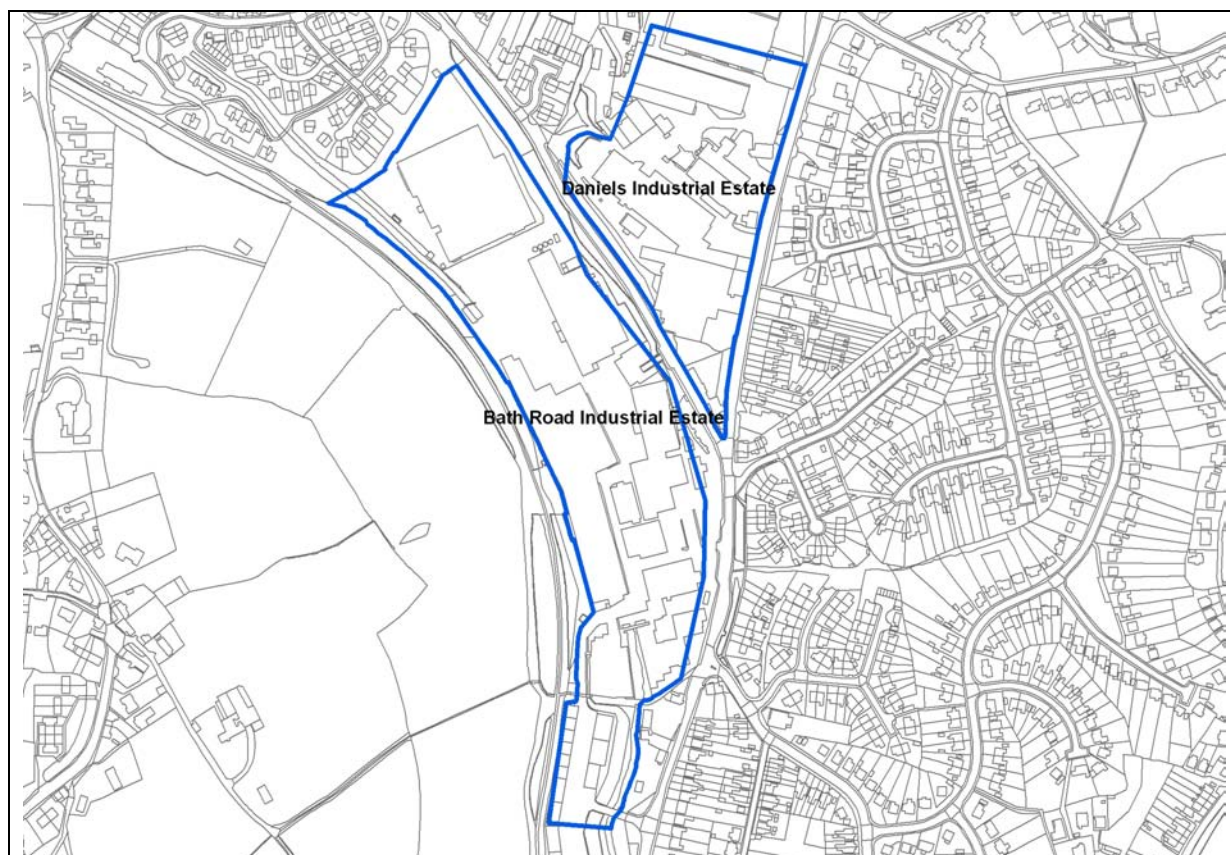
Area Reference	EM3, Site EK7
Name	Dudbridge Industrial Area, Cainscross, Stroud
Description	Low quality mill complex, including several derelict/demolished properties
Occupier(s)	Multiple – Including Klenzeen, Whitminster International and Stroud Metal Co.
Prominence	High
Current Use (Use Classes)	B1(a, c)/B2/B8
Size, ha	4.90
Building Age	Pre 1945
Building Quality	Low
Access Constraints	Accessed via dual carriageway
Distance to M5 Motorway, km	7
Distance to A-road, km	Fronts A419 Dudbridge Road and A46 Dudbridge Hill
Distance to Rail Station, km	2 – Stroud Station
Distance to Existing Bus Route, km	On bus route (A419 Dudbridge Road).
Distance to Services, km	Foodstore adjacent
Car Parking	Moderate – Some private parking available at some units
Constraints	In flood risk area In a Conservation Area Recreation space to the east Public footpath crosses the area Trees in the area
Critical Mass	No
Opportunities for redevelopment/ expansion	Most property in the north and east of the area has now been demolished, while property in the south and west appears poorly occupied. Dudbridge Industrial Area therefore represents a significant redevelopment opportunity in Stroud Town.
Other Information	-

Recommendations	Poorly used area providing a regeneration opportunity for Stroud Town, which could be linked to improvements to the adjacent Thames-Severn Canal. The area occupies a prominent position at the junction of several strategic roads. It would therefore be suitable for redevelopment to provide a mix of uses including retail, leisure and B1(a) offices, as well as B1(c)/B2/B8 industry and warehousing.
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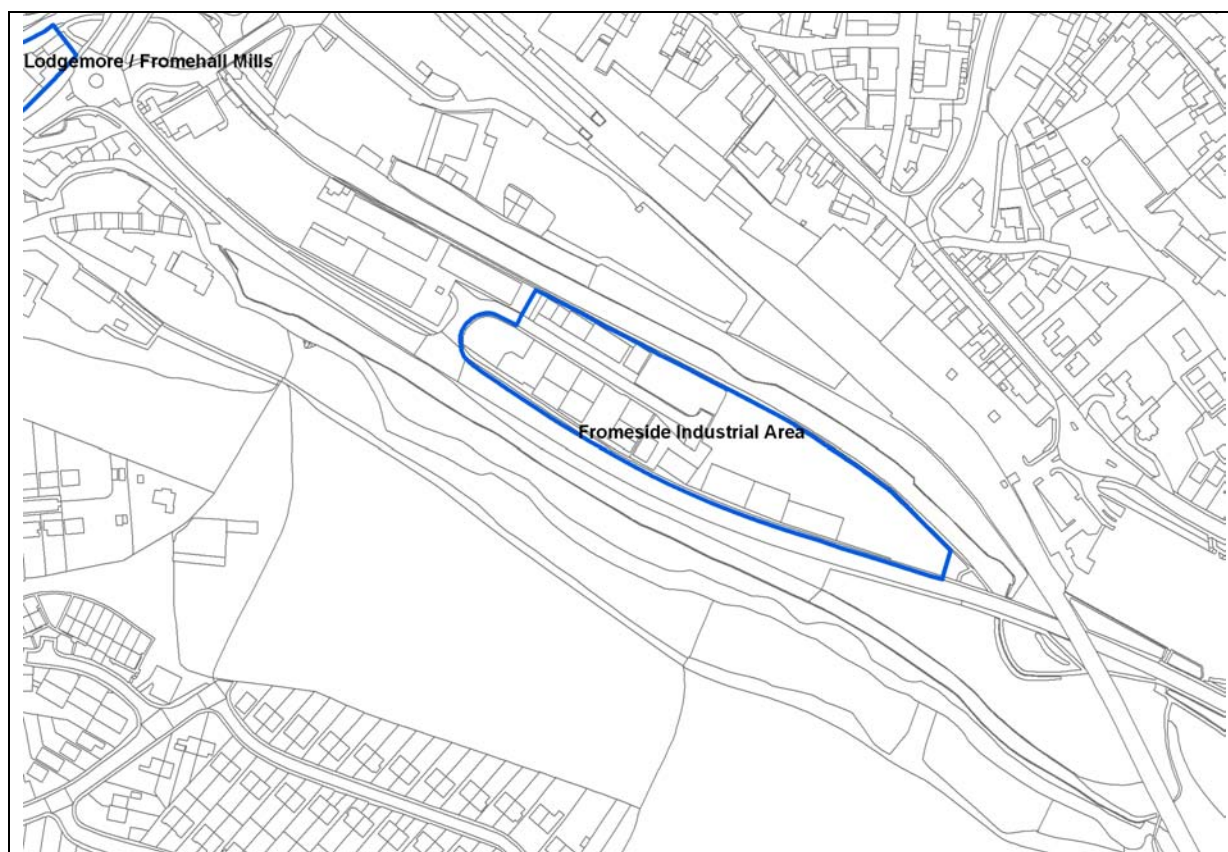
Area Reference	EM3, Site EK8
Name	Daniels Industrial Estate, Bath Road, Rodborough, Stroud
Description	Moderate quality industrial estate on a steeply sloping hillside location.
Occupier(s)	Multiple – Including Ermin Plant Hire
Prominence	High
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	3.34
Building Age	Various – Mostly post-1960
Building Quality	Moderate
Access Constraints	Access to north of the area is steeply sloping
Distance to M5 Motorway, km	7.5
Distance to A-road, km	Fronts A46 Dudbridge Road
Distance to Rail Station, km	2.5 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Dudbridge Road)
Distance to Services, km	0.4 – Foodstore on Dudbridge Hill
Car Parking	Moderate – Some private parking available at some units
Constraints	Housing to the north west and east Trees in the area
Critical Mass	Yes

<p>Opportunities for redevelopment/expansion</p>	<p>Area has been identified as a redevelopment opportunity, capable of providing some retail (foodstore) uses. However, at present most land and premises appears to be in use and the industrial estate continues to function. The steeply sloping nature of the area may also make redevelopment difficult.</p> <p>Visual inspection and discussions with owners/managers suggest that the nearby Dudbridge Industrial Area (Site EK7) and Bath Road Industrial Estate (Site EK9) provide better redevelopment opportunities.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Established urban industrial estate providing budget/moderate accommodation to local firms. At present most of these properties are in use and other nearby employment areas provide better redevelopment opportunities. Daniels Industrial Estate should therefore be protected for employment uses.</p> <p>However, should the industrial estate fall into long term vacancy/dereliction then it may provide an opportunity for refurbishment/redevelopment to provide new employment and/or retail premises.</p>



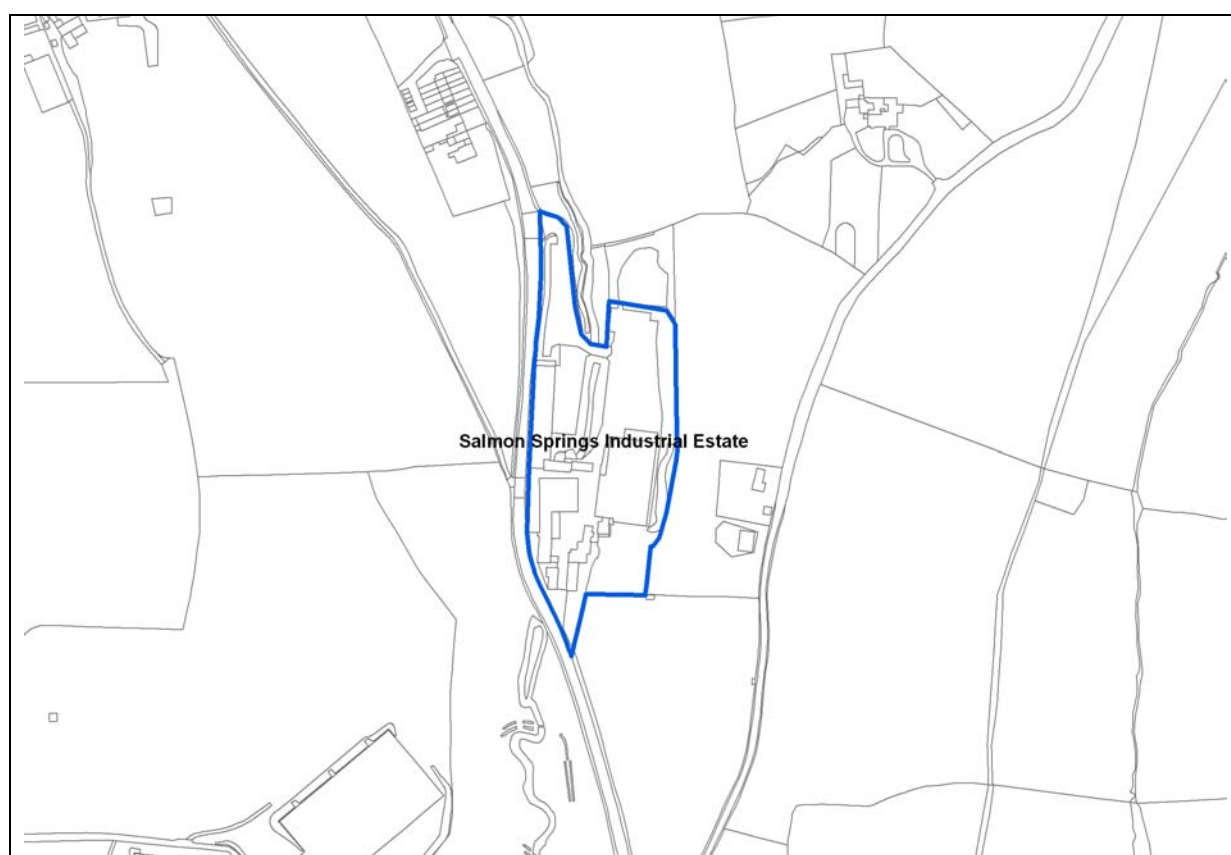
Area Reference	EM3, Site EK9
Name	Bath Road Industrial Estate, Rodborough, Stroud
Description	Substantial employment area, including a listed mill complex, terraced industrial units and accommodation for a major occupier.
Occupier(s)	Multiple – Including British Polymer Industries
Prominence	High
Current Use (Use Classes)	B1(a, c)/B2/B8
Size, ha	6.40
Building Age	Various mostly pre 1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	7.5
Distance to A-road, km	Fronts A46 Dudbridge Road
Distance to Rail Station, km	2.5 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Dudbridge Road)
Distance to Services, km	0.4 – Foodstore on Dudbridge Hill
Car Parking	Moderate – Private parking available at some units
Constraints	In flood risk area In a Conservation Area Includes listed buildings Trees in the area
Critical Mass	Yes

<p>Opportunities for redevelopment/ expansion</p>	<p>Area has been identified as a partial redevelopment opportunity, capable of providing some retail (foodstore) uses. The owner has marketed the area to the major foodstore operators, but received little interest (the operators consider Stroud town to be at capacity). However, Aldi have now expressed an interested in purchasing 0.4 ha to deliver a 929 sqm foodstore.</p> <p>The area was also considered for a residential development, but this was subsequently judged to be unviable. Leisure or bulky goods uses are also seen as inappropriate on this site.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>The bulk of this area appears to function well, with some recent investment in refurbishing units and development of a frontage property, for an auction house. These properties should therefore be protected for employment uses.</p> <p>Any vacant/poorly used land should be considered for retail uses, reflecting the identified demand for a small foodstore.</p>



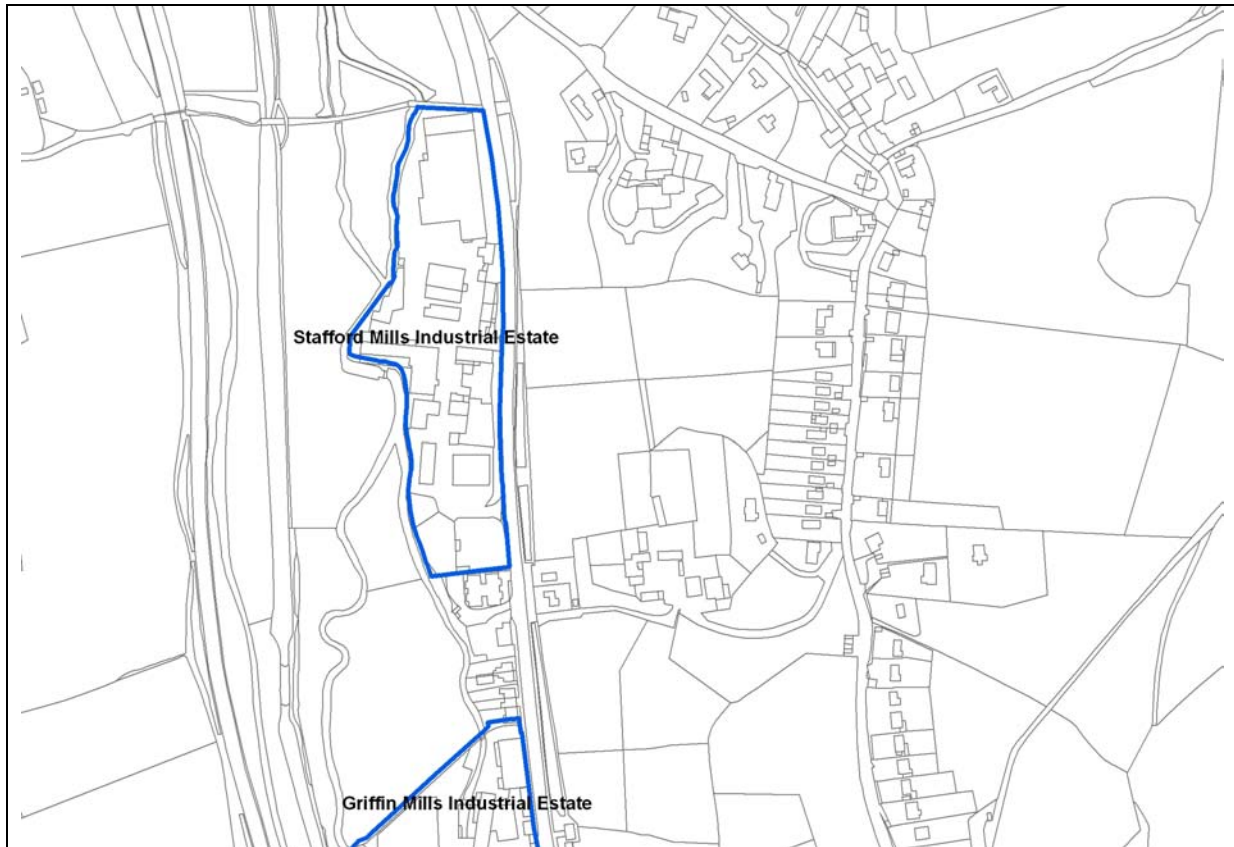
Area Reference	EM3, Site EK10
Name	Fromeside Industrial Estate, Dr Newton's Way, Stroud
Description	Small estate of moderate quality terraced industrial units, centrally located in Stroud town.
Occupier(s)	Multiple – Including Jewsons
Prominence	High
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	1.36
Building Age	Modern
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	8
Distance to A-road, km	Fronts A419 Dr Newton's Way
Distance to Rail Station, km	0.5 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Dr Newton's Way)
Distance to Services, km	0.5 – Stroud Town Centre
Car Parking	Good – Some private parking available at all units
Constraints	In flood risk area Units back onto Thames Severn Canal
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Successful industrial estate with all land and premises in use. Further growth of the area is prevented by surrounding uses, including canal to the north.
Other Information	-
Recommendations	Successful industrial estate, prominently located close to Stroud Town Centre. The area has become an established location for trade occupiers (linked to the adjacent Travis Perkins depot) and should be protected for employment uses.

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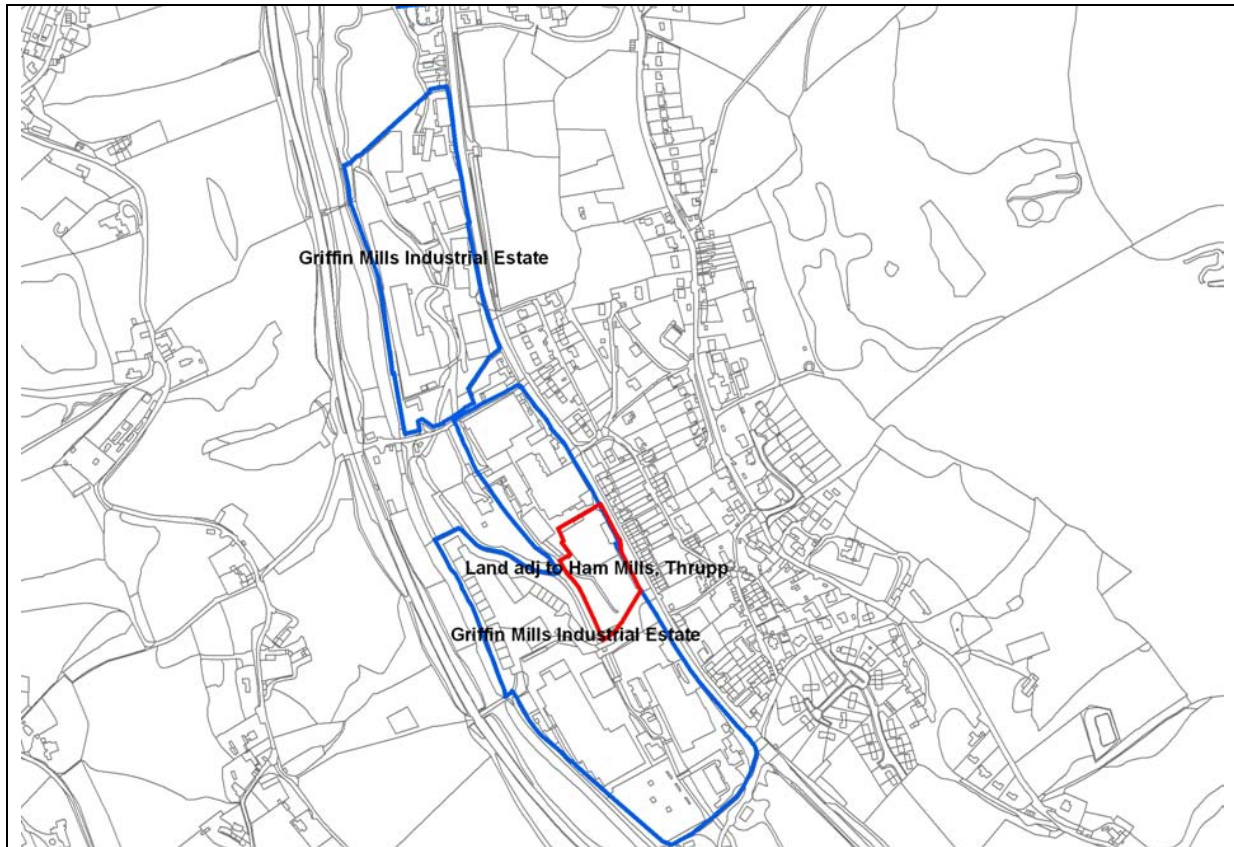
Area Reference	EM3, Site EK11
Name	Salmon Springs Industrial Estate, Painswick Road, Stroud
Description	Edge of settlement industrial estate comprising several mill properties on a main road location.
Occupier(s)	Multiple
Prominence	High
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	2.07
Building Age	Pre 1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	9
Distance to A-road, km	Fronts A46 Painswick Road
Distance to Rail Station, km	1 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Painswick Road)
Distance to Services, km	0.7 – Stroud Town Centre
Car Parking	Moderate – Private parking available at some units
Constraints	In flood risk area Conservation Area adjacent On the edge of the Cotswold AONB Trees in the area
Critical Mass	No
Opportunities for redevelopment/ expansion	The historic mill properties may provide some opportunities for further refurbishment and sub-division of units. Further expansion of the area would not be possible without the loss of greenfield land (within the Cotswold AONB).
Other Information	-

Recommendations	Premises on the Industrial Estate are on the market for retail showroom and office uses. Subject to sequential testing, this prominent, edge of settlement area is well placed to accommodate such uses supporting the further diversification of Stroud town's economy.
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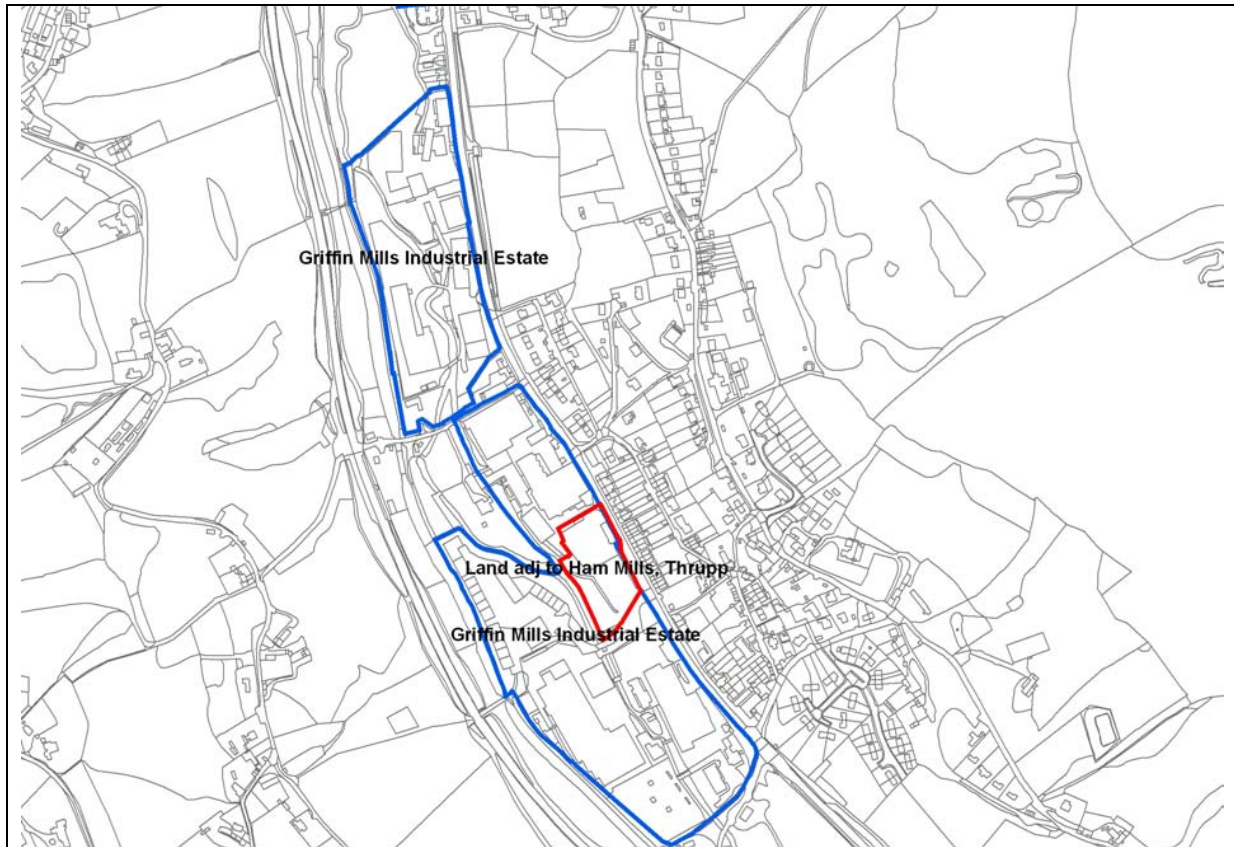
Area Reference	EM3, Site EK12
Name	Stafford Mills Industrial Estate, London Road, Stroud
Description	Small, budget quality industrial estate dominated by motor trade occupiers.
Occupier(s)	Multiple
Prominence	High
Current Use (Use Classes)	B1(c)/B2/B8/ Sui Generis
Size, ha	1.71
Building Age	Mostly post 1960
Building Quality	Low
Access Constraints	-
Distance to M5 Motorway, km	10
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	2 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	1.5 – Stroud Town Centre
Car Parking	Good – Private parking available all units
Constraints	In flood risk area In Conservation Area Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Low quality units within the estate may provide small scale opportunities for refurbishment and redevelopment. This includes buildings formally occupied by Crown Aluminium, which have recently been sold. Further expansion of the estate would require bridging of the River Frome to the west.
Other Information	-

Recommendations	This small industrial estate should be broadly protected for employment uses. However, the Council should also review the estate in more detail, considering what regeneration opportunities exist in the older units. This should include discussions with the purchasers of the former Crown Aluminium site, to determine their future investment plans.
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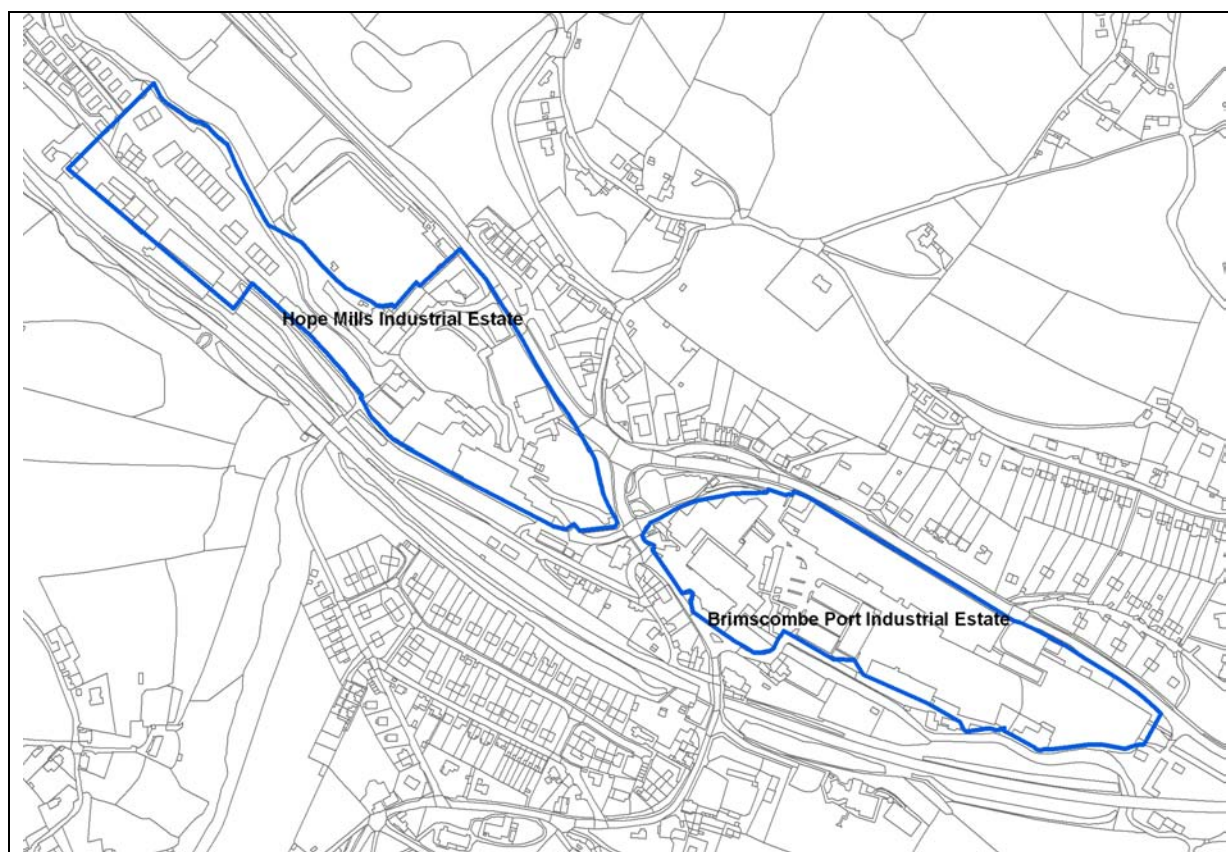
Area Reference	EM3, Site EK13
Name	Griffin Mills Industrial Estate North, London Road, Thrupp
Description	Moderate quality industrial estate, comprising several sub-divided mill properties which house office, industrial, craft and retail firms. Also accommodation for a large occupier.
Occupier(s)	Multiple – Including Nu Pro
Prominence	High
Current Use (Use Classes)	A1/B1(a, c)/B2/B8
Size, ha	3.50
Building Age	Pre 1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	10.4
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	2.4 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	2 – Stroud Town Centre
Car Parking	Moderate – Limited parking available around the mills
Constraints	In flood risk area In Conservation Area Includes listed buildings Trees in the area
Critical Mass	Yes

Opportunities for redevelopment/ expansion	Although there may be further opportunities to refurbish and remodel the mills, these buildings presently provide a useful function accommodating new/micro workshop, office and craft/retail businesses. More significant redevelopment would require major alteration to listed buildings. At present, there is no evidence of any demand for such a project.
Other Information	-
Recommendations	Although there may be (limited) opportunities for refurbishment/remodelling, the priority should be to protect these buildings as an important source of small business space in the Stroud Valleys.



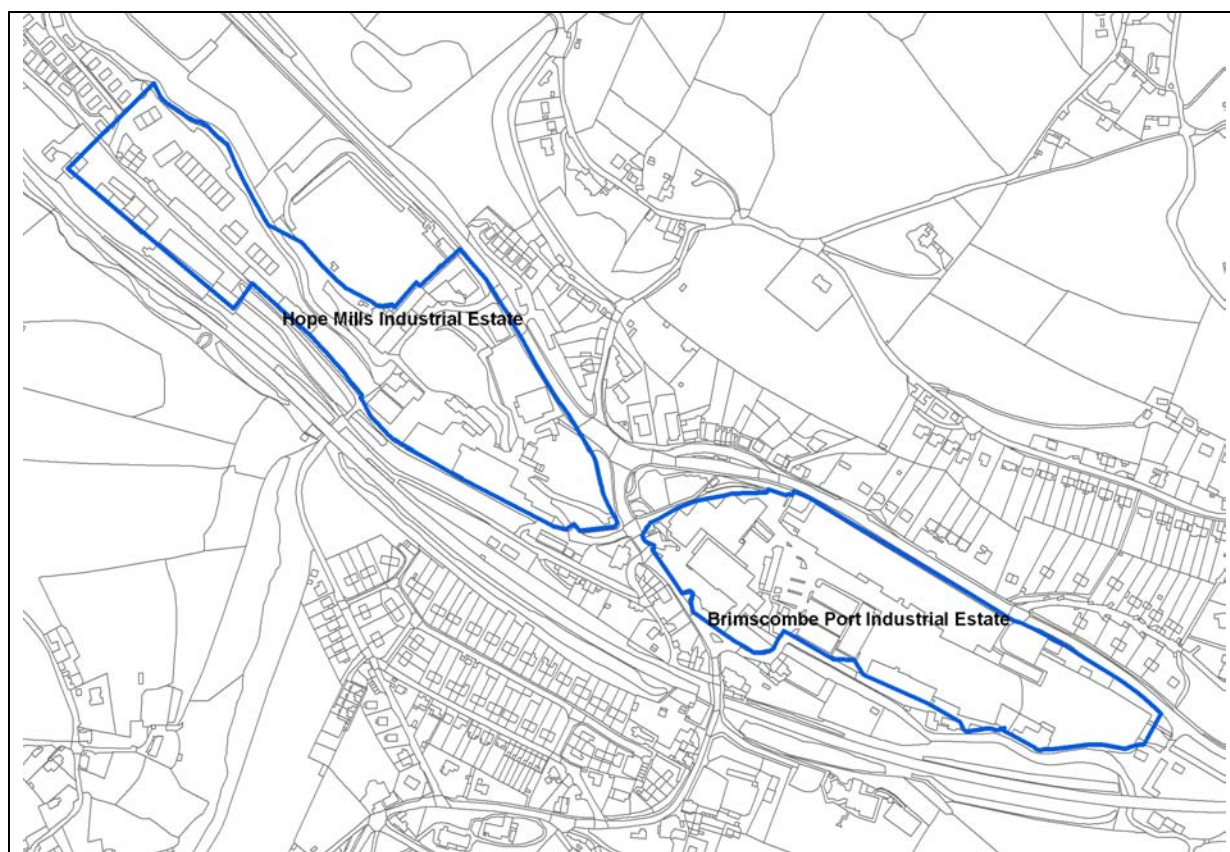
Area Reference	EM3, Site EK14
Name	Griffin Mills Industrial Estate South (Phoenix Industrial Estate), London Road, Thrupp
Description	Estate of moderate quality terraced industrial units, with some lower quality accommodation in the north
Occupier(s)	Multiple – Including Western Self Storage, PTS and Benchmark
Prominence	Moderate
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	7.26
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	10.4
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	2.4 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	2 – Stroud Town Centre
Car Parking	Good – Private parking available all units
Constraints	In flood risk area In Conservation Area Trees in the area
Critical Mass	Yes

Opportunities for redevelopment/ expansion	Area includes employment Site EA12: ' <i>Land adj. Ham Mills, A419 London Road, Thrupp</i> ' (0.60 ha). This land, combined with the low quality industrial units to the north (which are under common ownership) represent a significant redevelopment opportunity. At present there are no identified development plans for either the land or buildings, but the Council should continue to monitor this land as a future investment opportunity. Elsewhere, the estate appears in reasonable condition and well used, presenting no other regeneration opportunities.
Other Information	-
Recommendations	This industrial estate should be protected for employment uses. The Council should continue to review Site EA12 and the properties to the north as a potential regeneration opportunity in the Stroud Valleys.



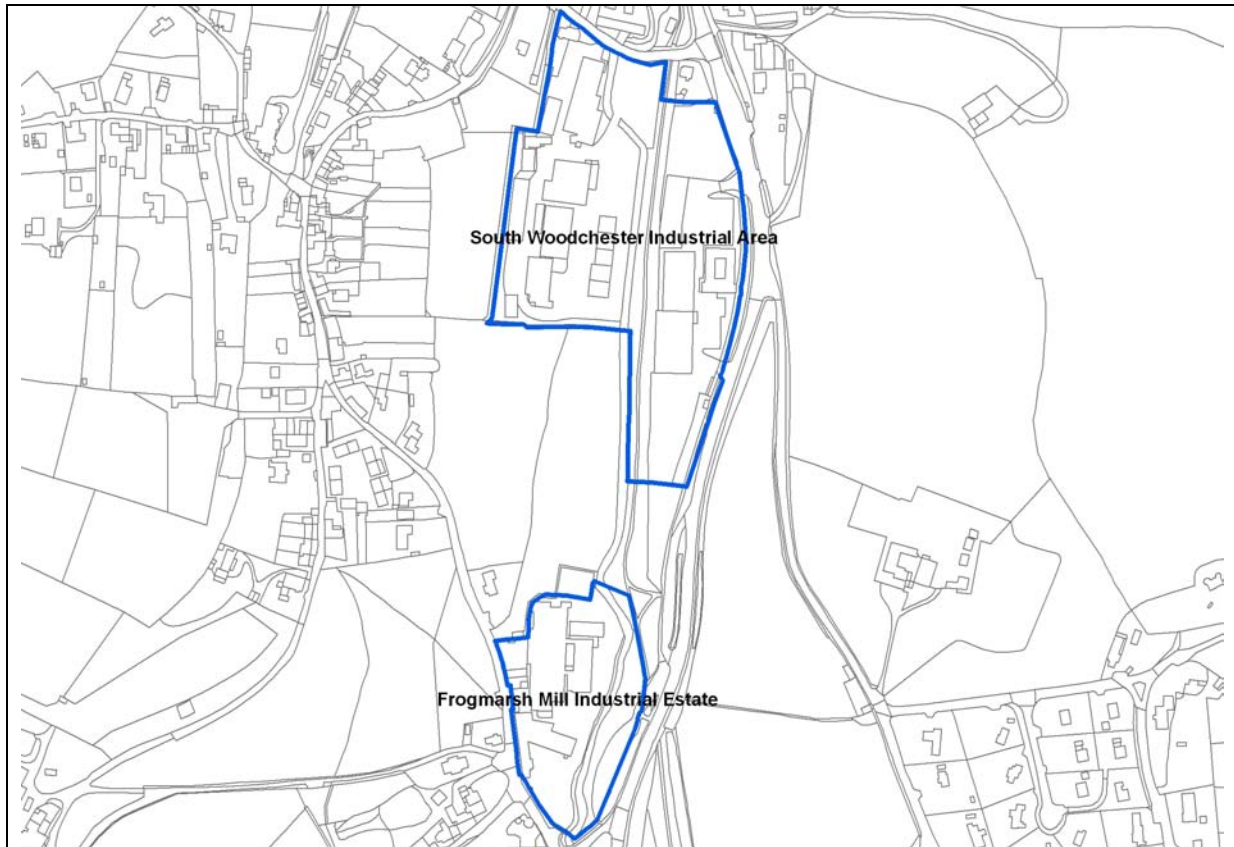
Area Reference	EM3, Site EK15
Name	Hope Mills Industrial Estate, London Road, Thrupp
Description	Established, moderate quality industrial estate, partly in a backland location
Occupier(s)	Multiple – Including Exled
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	4.83
Building Age	Various
Building Quality	Moderate
Access Constraints	Access to the north (Hope Mills Lane) is via a residential area
Distance to M5 Motorway, km	11
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	3 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	2.4 – Stroud Town Centre
Car Parking	Moderate – Limited parking available at some units
Constraints	In flood risk area In Conservation Area Trees in the area Recreation areas adjacent. Some historic properties may be listed.
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Individual units may provide some opportunities for refurbishment. There is a small area of cleared brownfield land, close to the southern entrance to the estate, which could provide additional development land, if required. Expansion of the estate elsewhere is constrained by surrounding uses.

Other Information	-
Recommendations	Moderate quality industrial estate, serving the Stroud Valleys. Hope Mills Industrial Estate should be protected for employment uses.



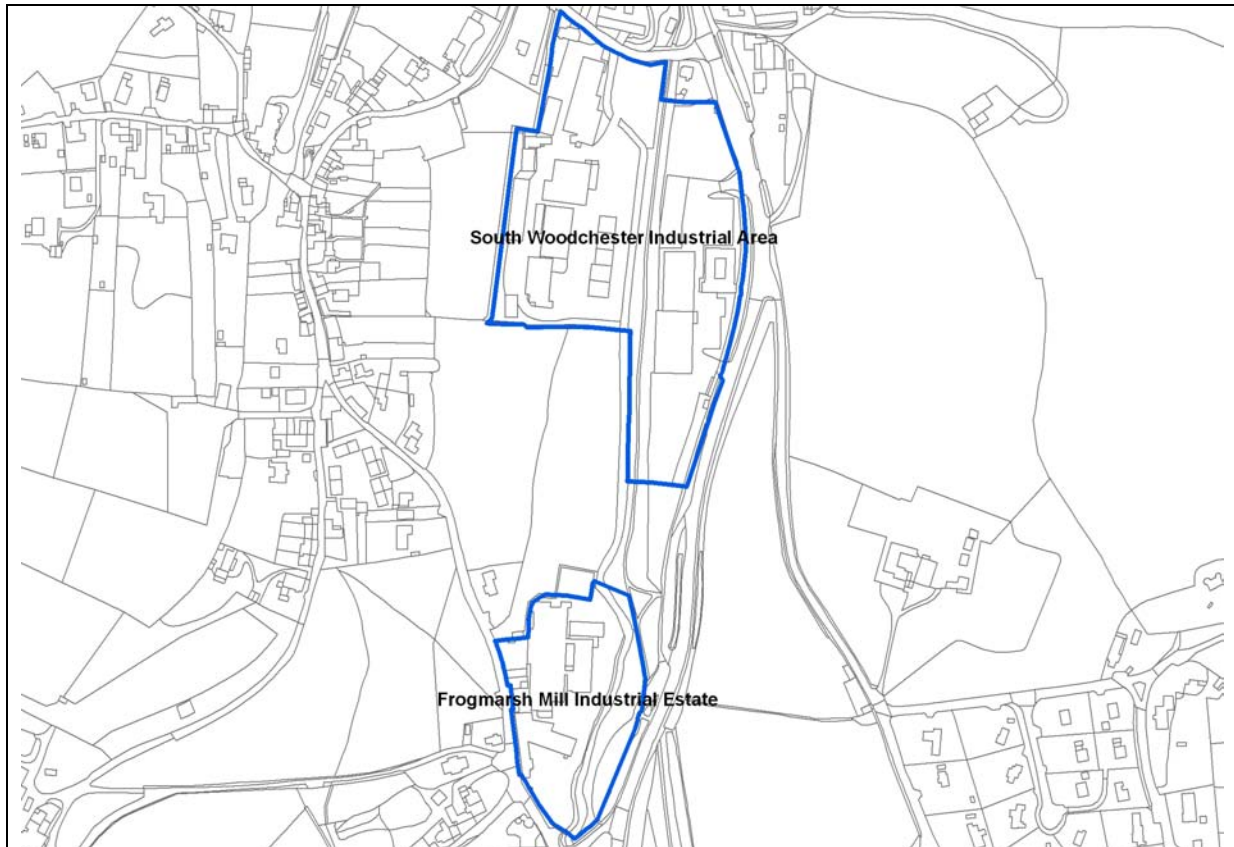
Area Reference	EM3, Site EK16
Name	Brimscombe Port Industrial Area, London Road, Thrupp
Description	Historic mill complex, sub-divided to provide small office and workshop accommodation.
Occupier(s)	Multiple – Including CVB Media and Burkhardt
Prominence	High
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	4.20
Building Age	Pre 1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	11.1
Distance to A-road, km	Off the A419 London Road
Distance to Rail Station, km	3.1 – Stroud Station
Distance to Existing Bus Route, km	On bus route (London Road)
Distance to Services, km	2.5 – Stroud Town Centre
Car Parking	Moderate – Limited parking available at some units
Constraints	In flood risk area In Conservation Area Trees in the area Housing adjacent Some historic properties are listed
Critical Mass	Yes

<p>Opportunities for redevelopment/ expansion</p>	<p>Brimscombe Port has outline planning permission for a mixed-use redevelopment scheme which would provide some 1,486 sqm of business space (plus the retention of Port Mill for offices), 1,412 sqm of ground floor retail/commercial space, 234 dwellings and Live/Work units and potentially a 50 bed hotel. However, a tendering process, undertaken in early 2012, did not produce any suitable bids from developers. The project is presently on hold pending an improving economic climate.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Despite the present lack of developer interest, Brimscombe Port continues to represent a significant regeneration opportunity in the Stroud Valleys. The Council should continue to market the project to developers, considering (if necessary) how the development mix could be altered to improve its financial viability and market attractiveness.</p>



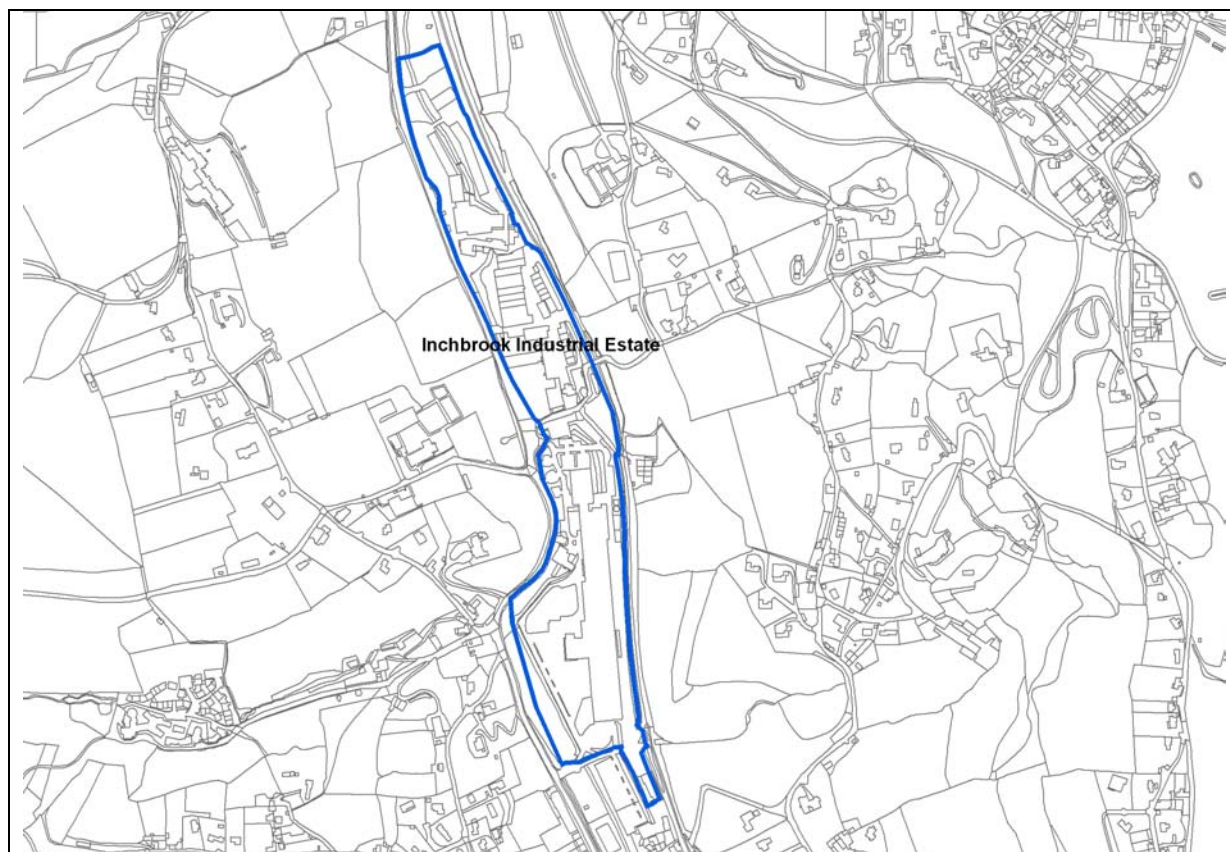
Area Reference	EM3, Site EK17
Name	South Woodchester Industrial Area, Bath Road, Woodchester
Description	Substantial modern industrial complex, on a main road, edge of settlement location.
Occupier(s)	Multiple – Including Omnitrack
Prominence	High
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	3.18
Building Age	Mostly modern
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	10
Distance to A-road, km	Fronts the A46 Bristol Road
Distance to Rail Station, km	3.5 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	3 – Foodstore, A46 Dudbridge Hill
Car Parking	Good – Parking available for all units
Constraints	Flood risk area Public footpath crosses the area In Conservation Area Includes key wildlife sites Trees in the area
Critical Mass	Yes

Opportunities for redevelopment/ expansion	The large factory, fronting the A46, has recently been sold. There are areas of cleared brownfield land within the curtilage of the facility, which could allow its expansion, should this be required by the new owners. Further expansion of the area would not be possible without encroaching into surrounding greenfield land (which includes areas of nature conservation value and land within the Cotswold AONB).
Other Information	-
Recommendations	A good quality industrial area in the Stroud Valleys, offering a range of modern industrial units. This industrial estate should be protected for employment uses. The largest factory in the area has recently been sold to an unknown party. The Council should engage with this purchaser to determine if they have any investment plans for the facility.



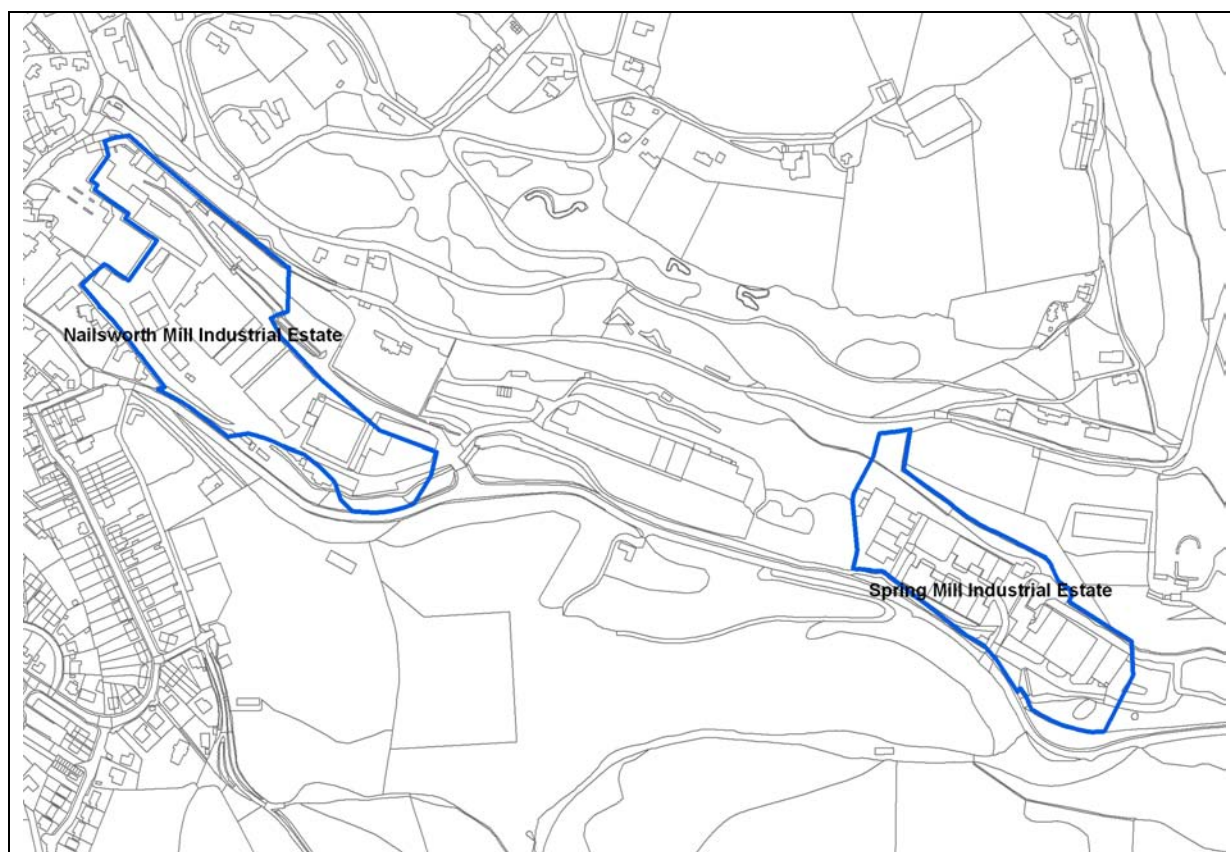
Area Reference	EM3, Site EK18
Name	Frogmarsh Mill Industrial Estate, Bath Road, Woodchester
Description	Small, sub-divided mill complex with modern extensions to the rear
Occupier(s)	The Bike Works and Bottle Green Drinks Company
Prominence	Moderate
Current Use (Use Classes)	A1/B1(c)/B2
Size, ha	1.14
Building Age	Pre 1945
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	10.5
Distance to A-road, km	Fronts the A46 Bristol Road
Distance to Rail Station, km	4 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	2.5 – Nailsworth Town Centre
Car Parking	Good – Parking available for all units
Constraints	Flood risk area Public footpath crosses the area In Conservation Area Includes key wildlife sites Trees in the area Some historic properties may be listed.
Critical Mass	Yes

<p>Opportunities for redevelopment/ expansion</p>	<p>Small, dense employment area.</p> <p>The primary occupier (Bottle Green) has gradually expanded its operation over the past 10 years, taking up most of the available land and buildings (land fronting the A46 is wooded, sloping and inaccessible). The company estimates that in another 5-10 years it will have outgrown this area and will have to move some, or all, of its operations elsewhere in the District. Further expansion of the area is constrained by surrounding uses.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Small, good quality employment area housing a large local employer. In the short/medium term the area should be protected for employment uses. In the longer term, the Council may have to assist with the relocation of Bottle Green and consider the future of these properties.</p>



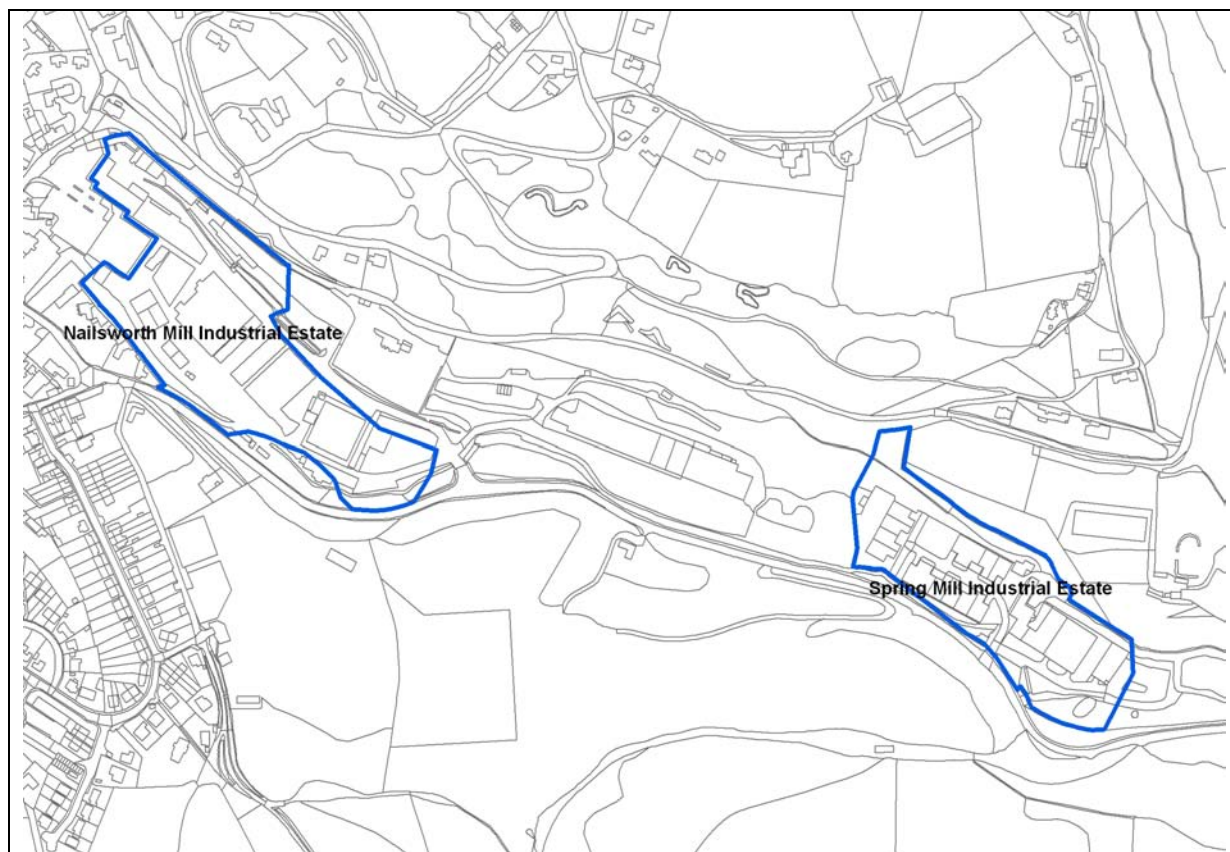
Area Reference	EM3, Site EK19
Name	Inchbrook Industrial Estate, Bath Road, Nailsworth
Description	Substantial, linear employment area comprising modern facilities for a major local employer, sub-divided mill complexes and several budget quality metal-framed units.
Occupier(s)	Multiple – Including Renishaw
Prominence	High
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	8.64
Building Age	Mostly pre-1945
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	10.7
Distance to A-road, km	Fronts the A46 Bristol Road
Distance to Rail Station, km	4.2 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	2.3 – Nailsworth Town Centre
Car Parking	Moderate –Parking available for most units (shared parking for some)
Constraints	Flood risk area In Conservation Area Includes key wildlife sites Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Dense employment area, all land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Some of the mill properties may provide future opportunities for refurbishment.
Other Information	-

Recommendations	Inchbrook Industrial Estate includes premises for a major local employer (Renishaw) while the smaller, budget accommodation to the north has become dominated by trade uses who take advantage of the estate's prominent position on the A46. In this way the estate make a significant contribution to the local economy and should be protected for these uses.
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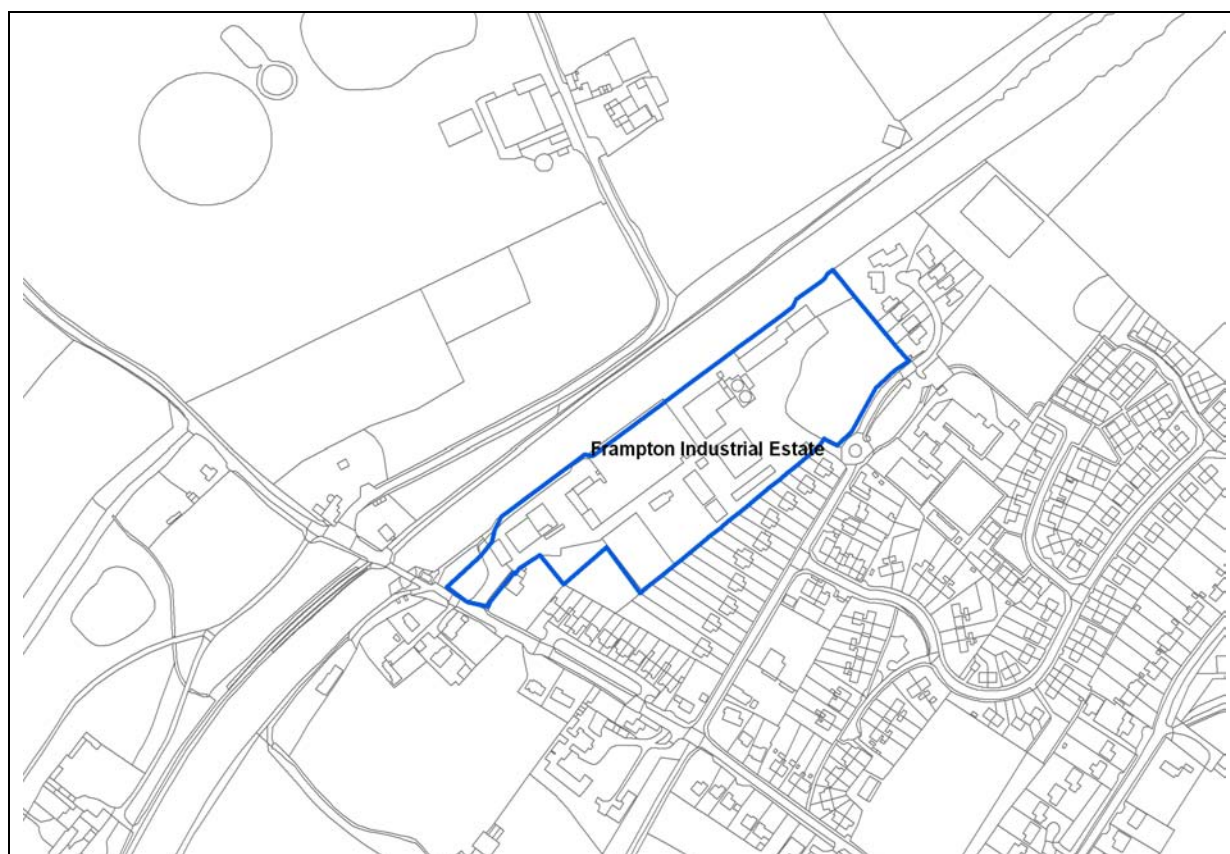
Area Reference	EM3, Site EK20
Name	Nailsworth Mill Industrial Estate, Avening Road, Nailsworth
Description	Good quality, established industrial estate, comprising stone built units in a valley bottom location
Occupier(s)	Multiple – Including DB Autotechnic
Prominence	Moderate
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	3.31
Building Age	Primarily modern
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	12
Distance to A-road, km	0.1 – A46 Bridge Street
Distance to Rail Station, km	6 – Stroud Station
Distance to Existing Bus Route, km	On bus route (George Street)
Distance to Services, km	Foodstore and other Nailsworth Town Centre shops adjacent.
Car Parking	Good – Private parking available at most units
Constraints	In flood risk area Partly in Conservation Area Trees in the area Includes a small recreation site Some historic properties may be listed
Critical Mass	Yes
Opportunities for redevelopment/expansion	Dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley.
Other Information	-

Recommendations	Successful, modern industrial estate, centrally located in Nailsworth. Nailsworth Mill Industrial Estate should be protected for employment uses.
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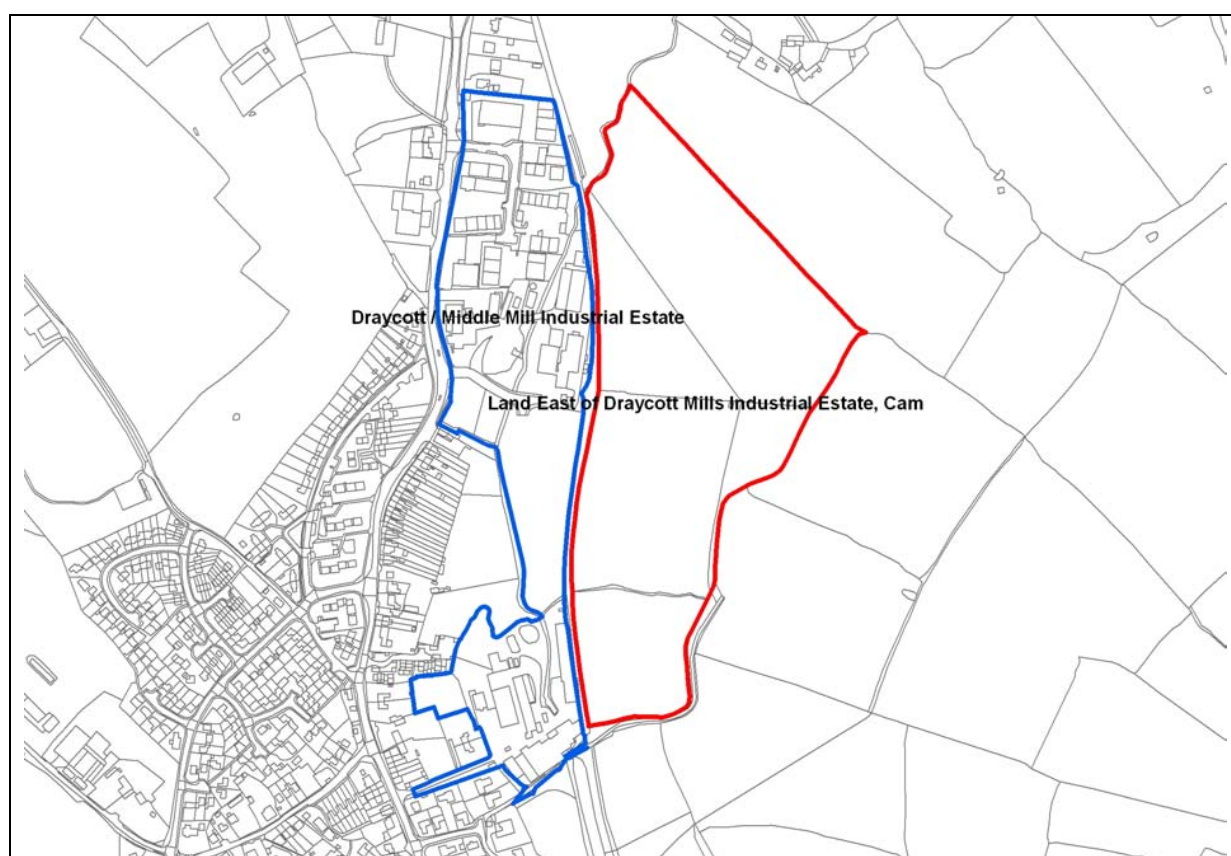
Area Reference	EM3, Site EK21
Name	Spring Mill Industrial Estate, Avening Road, Nailsworth
Description	Good quality, established industrial estate, comprising stone built units in a valley bottom location. Includes a recent mill refurbishment (Holcombe Mill).
Occupier(s)	Multiple – Including the Birdcare Company
Prominence	Low
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	2.37
Building Age	Various
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	13
Distance to A-road, km	1– A46 Bridge Street
Distance to Rail Station, km	7 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Avening Road)
Distance to Services, km	1 – Foodstore and other Nailsworth Town Centre shops (also close to Nailsworth Garden Centre)
Car Parking	Good – Private parking available at most units
Constraints	In flood risk area In Conservation Area Trees in the area Some historic properties may be listed
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Small, dense, modern industrial estate. All land and property is in use. Further expansion of the area is prevented by adjoining uses and the sloping topography of the surrounding valley. Refurbishment of the existing mill properties has already taken place.
Other Information	-

Recommendations	Small but successful industrial estate serving the Stroud Valleys. Spring Mill Industrial Estate should be protected for employment uses.
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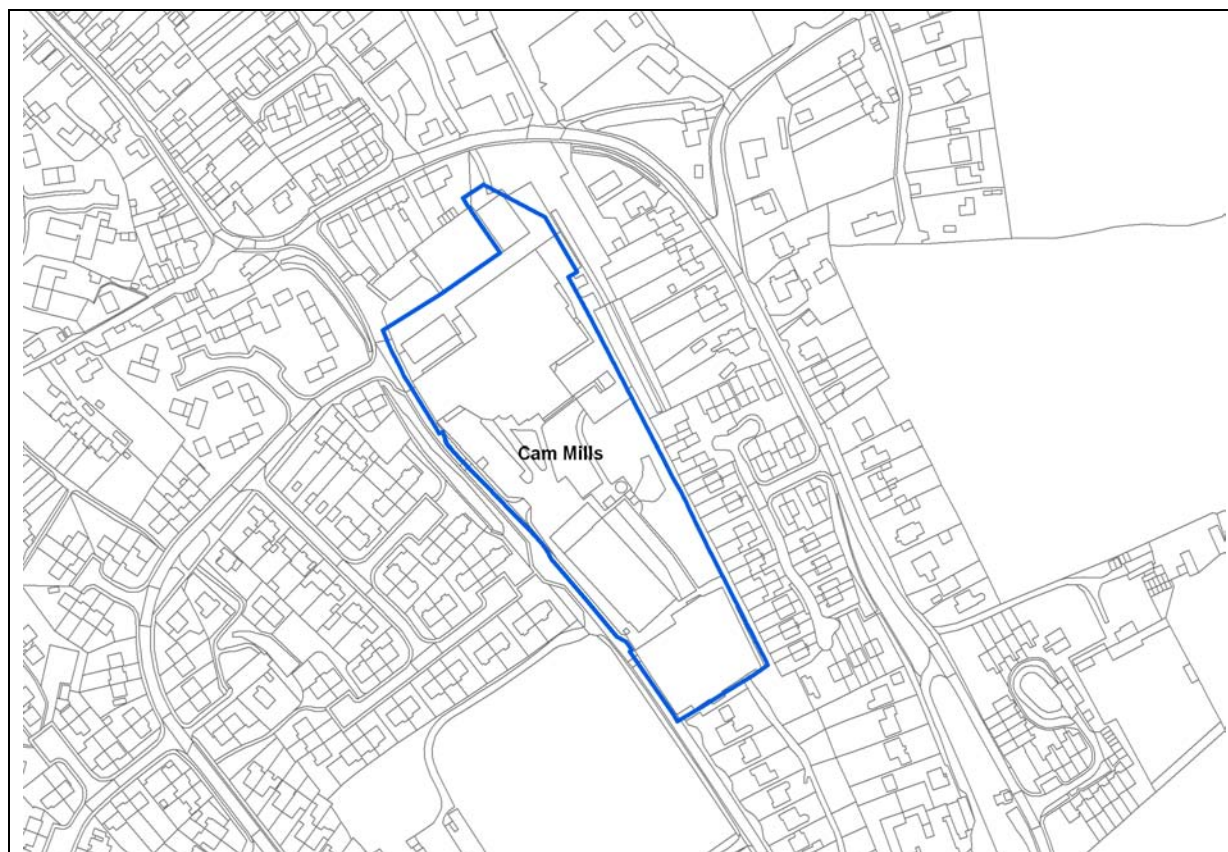
Area Reference	EM3, Site EK22
Name	Frampton Industrial Estate, Bridge Road, Frampton-on-Severn
Description	Budget quality, canal side industrial estate in an edge of settlement location
Occupier(s)	Multiple – Including ACP Fuels
Prominence	Moderate
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	2.89
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	Narrow access off Bridge Road
Distance to M5 Motorway, km	4
Distance to A-road, km	3 – A38
Distance to Rail Station, km	8 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Bridge Road)
Distance to Services, km	0.6 – Frampton-on-Severn (limited) local shops (primarily off The Green)
Car Parking	Poor – Limited parking throughout the estate
Constraints	In flood risk area Nationally Important Wildlife Site to the west Housing to the north and east
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Tightly defined, dense industrial area presenting no opportunities for significant change. Further expansion is prevented by the surrounding canal and housing.
Other Information	-

Recommendations	Although the general quality of premises is low, the industrial estate remains well occupied. It is also the only significant source of industrial accommodation in the rural north western area of Stroud District. Frampton Industrial Estate should therefore be protected for employment uses.
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Area Reference	EM3, Site EK23
Name	Draycott/Middle Mill Industrial Area, High Street, Cam/Dursley
Description	Modern industrial estate, with accommodation for several large employers and expansion land in the south and east.
Occupier(s)	Multiple – Including Sundeala, Kerry Foods, Kwik Fit
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8, Sui Generis
Size, ha	21.94
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	8
Distance to A-road, km	Off A4135 Draycott Road
Distance to Rail Station, km	1 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	On bus route (Draycott Road)
Distance to Services, km	Petrol filling station and convenience retail adjacent
Car Parking	Good – Private parking available for all units
Constraints	In flood risk area Public footpaths pass through the area
Critical Mass	Yes
Opportunities for redevelopment/expansion	Existing estate comprises a range of reasonable quality, modern industrial units which provide no refurbishment/redevelopment opportunities. 13.51 ha of expansion land exists within, and to the west of the area. This is discussed further in Section 6.0 of the main report.

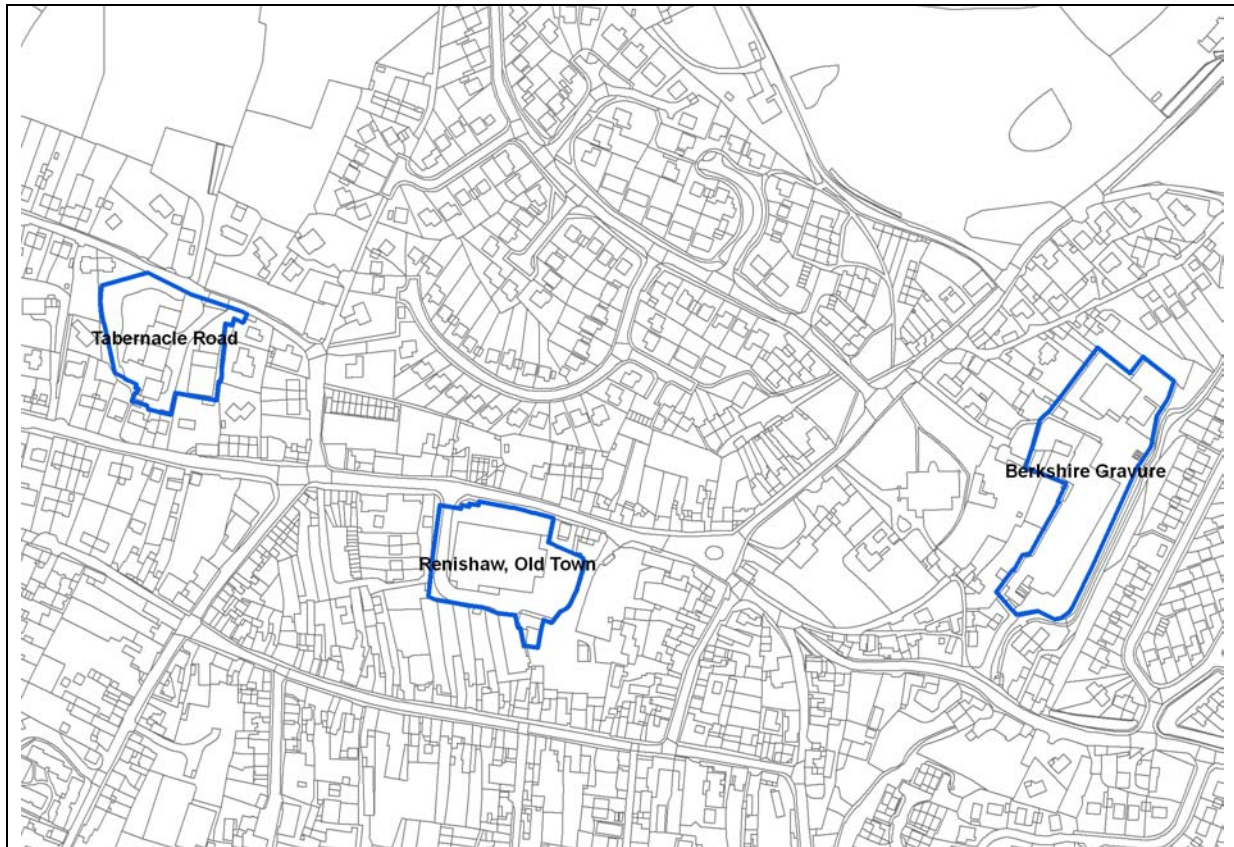
Other Information	-
Recommendations	The primary employment area for Cam/Dursley and a key source of modern industrial units in Stroud District. Draycott/Middle Mill Industrial Area should therefore be protected for employment uses. The identified employment sites should be brought forward, when possible, in order to ensure a forward supply of modern employment premises what will meet the future needs of businesses.



Area Reference	EM3, Site EK24
Name	Cam Mills, Everlands, Cam/Dursley
Description	Mill complex, plus modern extensions, occupied by a large local employer
Occupier(s)	WSP Textiles
Prominence	Moderate
Current Use (Use Classes)	B2
Size, ha	2.25
Building Age	(Primarily) pre-1945
Building Quality	Good
Access Constraints	Accessed via relatively narrow, residential roads
Distance to M5 Motorway, km	10
Distance to A-road, km	0.3 – A4135 High Street
Distance to Rail Station, km	3 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	On bus route (Everlands)
Distance to Services, km	0.3 – Cam Town Centre
Car Parking	Good – Extensive onsite parking available
Constraints	In flood risk area Surrounded by housing
Critical Mass	No
Opportunities for redevelopment/ expansion	Some undeveloped land in the east of the site (presently used for landscaping) which could permit the expansion of WSP, if required. All other land in use. Further expansion of the area is prevented by surrounding housing and recreation land.
Other Information	-
Recommendations	Facility for an established local employer. WSP has indicated that (apart from access) it is happy with its present accommodation, with no plans for change. Cam Mills should therefore be protected for employment uses.



Area Reference	EM3, Site EK27
Name	Tabernacle Road, Wotton-under-Edge
Description	Small backland industrial estate, dominated by motor trade occupiers
Occupier(s)	Multiple – Including Avonshire Vehicle Repairs
Prominence	Low
Current Use (Use Classes)	B1(c), Sui Generis
Size, ha	0.52
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	Backland site accessed by narrow, sloping residential road
Distance to M5 Motorway, km	8
Distance to A-road, km	5 – A4135 Whiteway
Distance to Rail Station, km	14 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	0.1 – Gloucester Street
Distance to Services, km	0.5 – Wotton local shops (Long Street)
Car Parking	Moderate– Private parking available for some units
Constraints	Wotton is within the Cotswold AONB Conservation Area adjacent
Critical Mass	No
Opportunities for redevelopment/ expansion	Dense area of reasonable quality industrial units, surrounded by housing. No refurbishment, redevelopment or expansion opportunities.
Other Information	-
Recommendations	Small reasonable quality employment area, serving local needs. Tabernacle Road should be protected for employment uses.



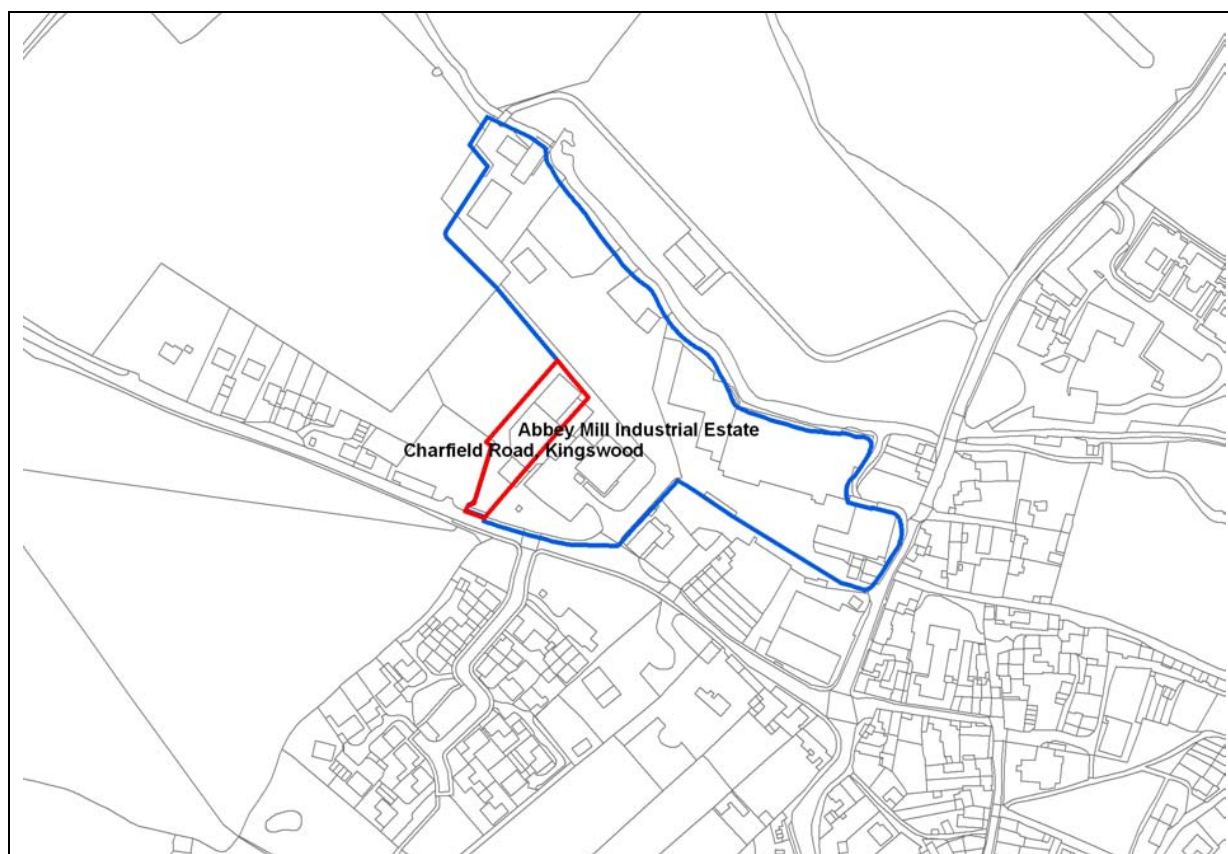
Area Reference	EM3, Site EK28
Name	Renishaw, Old Town, Wotton-under-Edge
Description	Solus facility for a major employer, centrally located in Wotton village
Occupier(s)	Renishaw
Prominence	High
Current Use (Use Classes)	B1(a), B2
Size, ha	0.57
Building Age	Post 1960
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	8
Distance to A-road, km	5 – A4135 Whiteway
Distance to Rail Station, km	14 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	On bus route (Gloucester Street)
Distance to Services, km	0.1 – Wotton local shops (Long Street)
Car Parking	High – reasonable private parking available
Constraints	Wotton is within the Cotswold AONB In Conservation Area Surrounded by housing
Critical Mass	No
Opportunities for redevelopment/ expansion	Good quality solus office/factory. Further expansion is constrained by surrounding uses.
Other Information	-
Recommendations	Facility for a major local employer which should be protected for employment uses.

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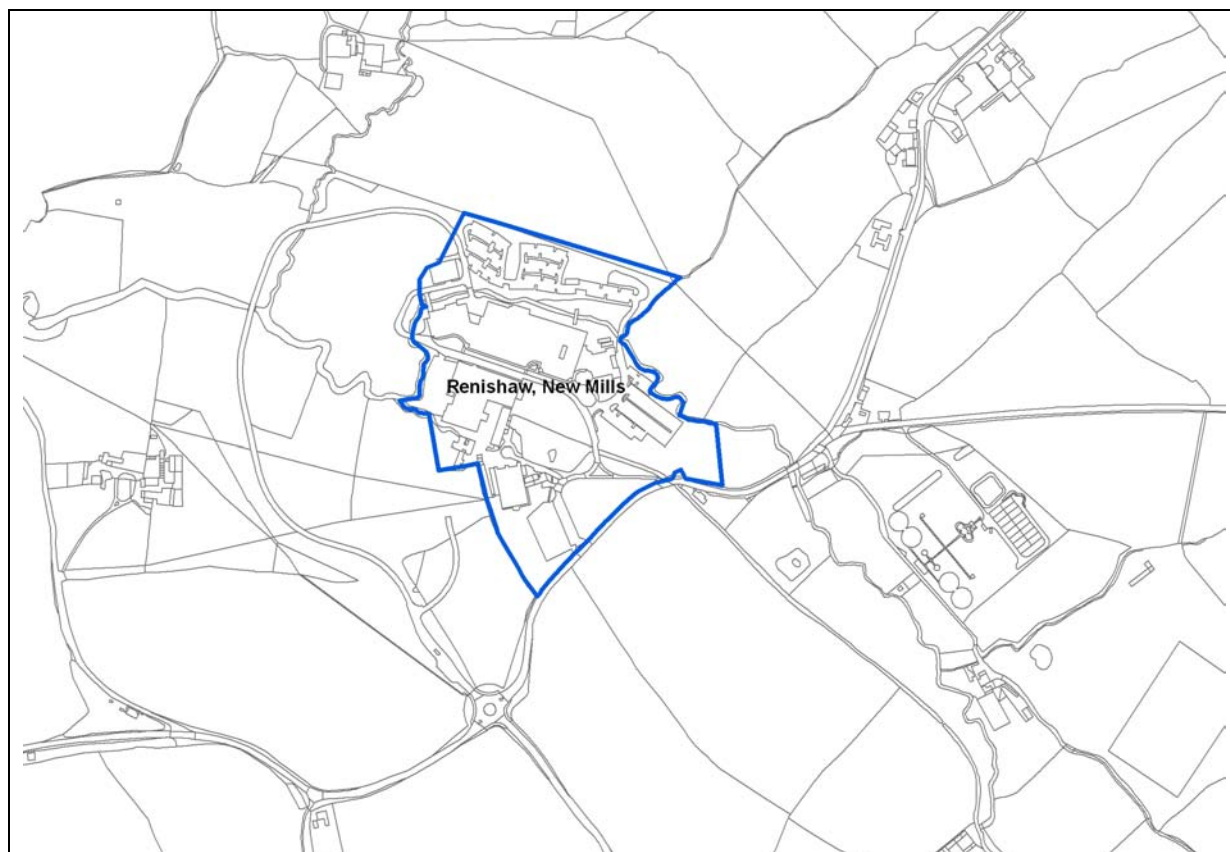
Area Reference	EM3, Site EK29
Name	(Former) Berkshire Gravure, Brookside, Wotton-under-Edge
Description	Linear, backland industrial area in a sloping residential location
Occupier(s)	CPC Stroud Flexibles
Prominence	Low
Current Use (Use Classes)	B1(c)
Size, ha	0.87
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	Narrow, sloping access road, bounded by adjacent housing
Distance to M5 Motorway, km	7.5
Distance to A-road, km	5 – A4135 Whiteway
Distance to Rail Station, km	14 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	0.1 – Culverhay
Distance to Services, km	0.3 – Wotton local shops (Long Street)
Car Parking	Low – Limited private parking available
Constraints	Wotton is within the Cotswold AONB Partly in Conservation Area Surrounded by housing
Critical Mass	No
Opportunities for redevelopment/expansion	Buildings in limited use as a printing facility. The area therefore represents a refurbishment/redevelopment opportunity, although the backland nature of the site is likely to limit both developer/occupier interest and practical options for change. Further expansion is constrained by surrounding uses.

Other Information	-
Recommendations	Site is presently underused. Should it become fully vacant, options for the re-use of this area for B1/B2/B8 employment would be limited by its backland location, access constraints and surrounding housing. Should redevelopment become necessary, the Council should consider the full range of options, including non-employment use, to bring the area back into productive use.



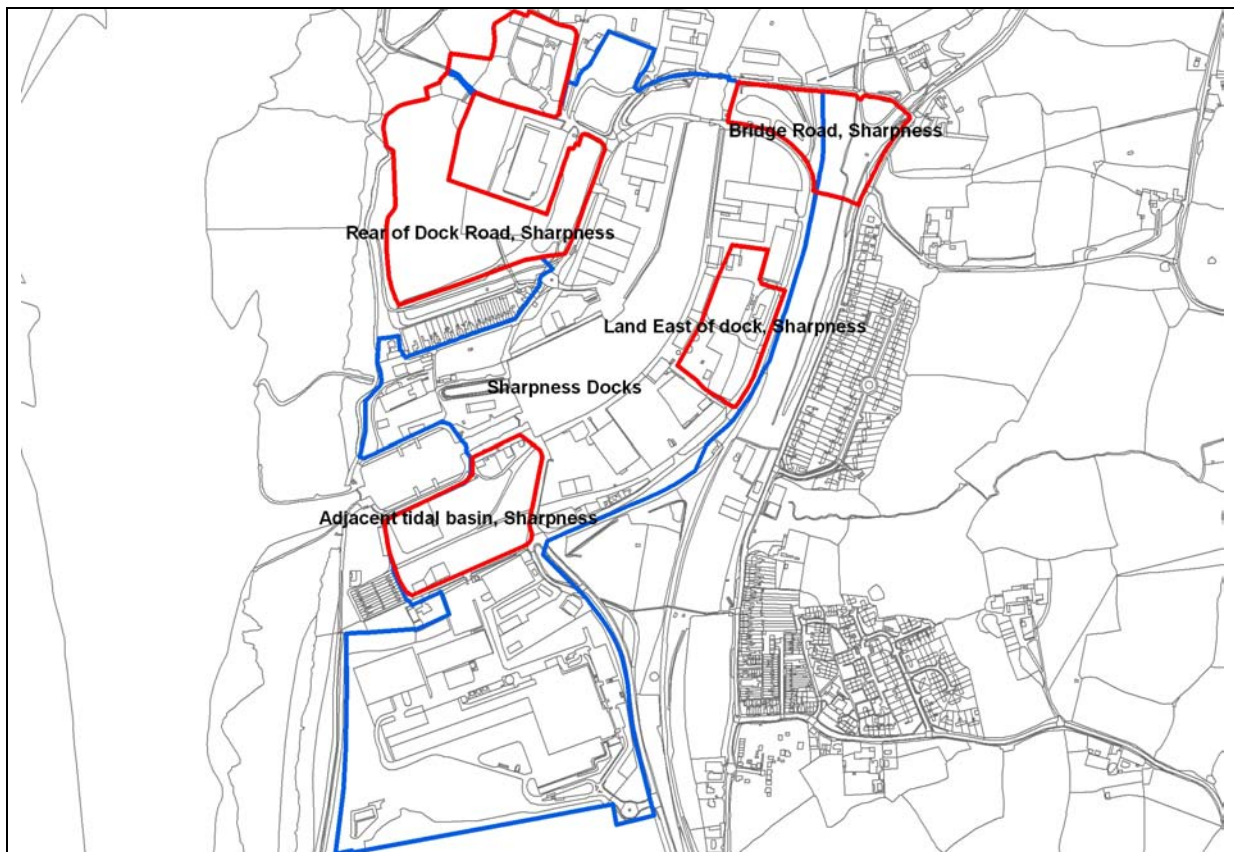
Area Reference	EM3, Site EK30
Name	Abbey Mill Industrial Estate, Charfield Road, Kingswood
Description	Small, moderate quality, edge of settlement industrial estate
Occupier(s)	Multiple – including SWA
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	2.33
Building Age	Primarily post 1960
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	7
Distance to A-road, km	7 – A4135 Whiteway (similar distance to A38)
Distance to Rail Station, km	12 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	On bus route (Charfield Road)
Distance to Services, km	0.1 – Kingswood local shops (High Street)
Car Parking	High – Reasonable parking available for all units.
Constraints	Partly in Conservation Area Housing adjacent Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Open land within the estate is in use for open storage. Includes employment Site EA7: 'Land off Charfield Road, Kingswood' (0.30 ha) which is now developed. Further expansion of the industrial estate would not be possible without the loss of some greenfield agricultural land. Would also require development outside of the present Kingswood settlement boundary.
Other Information	-

Recommendations	A successful local industrial estate. The development of Site EA7 is evidence of ongoing developer/occupier interest in this area. Abbey Mill Industrial Estate should therefore be protected for employment uses.
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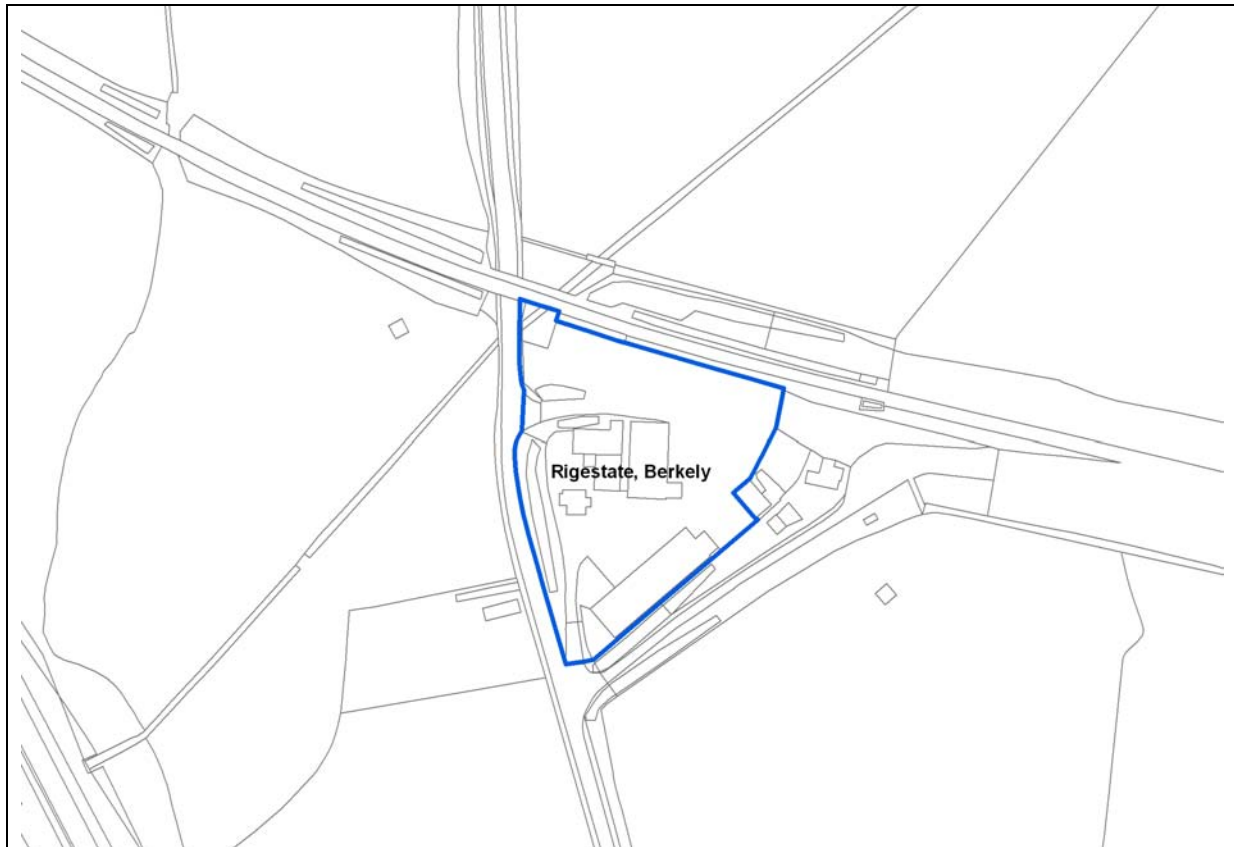
Area Reference	EM3, Site EK31
Name	Renishaw, New Mills, Kingswood
Description	Substantial, modern headquarters office/manufacturing facility for a major employer.
Occupier(s)	Renishaw
Prominence	Low
Current Use (Use Classes)	B1(a), B2
Size, ha	8.91
Building Age	Modern
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	6
Distance to A-road, km	6.5 – A38
Distance to Rail Station, km	12 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	0.2 – Charfield Road
Distance to Services, km	1.5 – Kingswood local shops (High Street)
Car Parking	High – Extensive onsite parking available
Constraints	In flood risk area Trees in the area
Critical Mass	No
Opportunities for redevelopment/ expansion	Modern HQ facility. Some undeveloped expansion land is available to meet the future needs of Renishaw (presently used as landscaping). Further growth of the area would not be possible without the loss of surrounding greenfield agricultural land.
Other Information	-
Recommendations	HQ facility for a major local employer. The area should be protected for employment uses.

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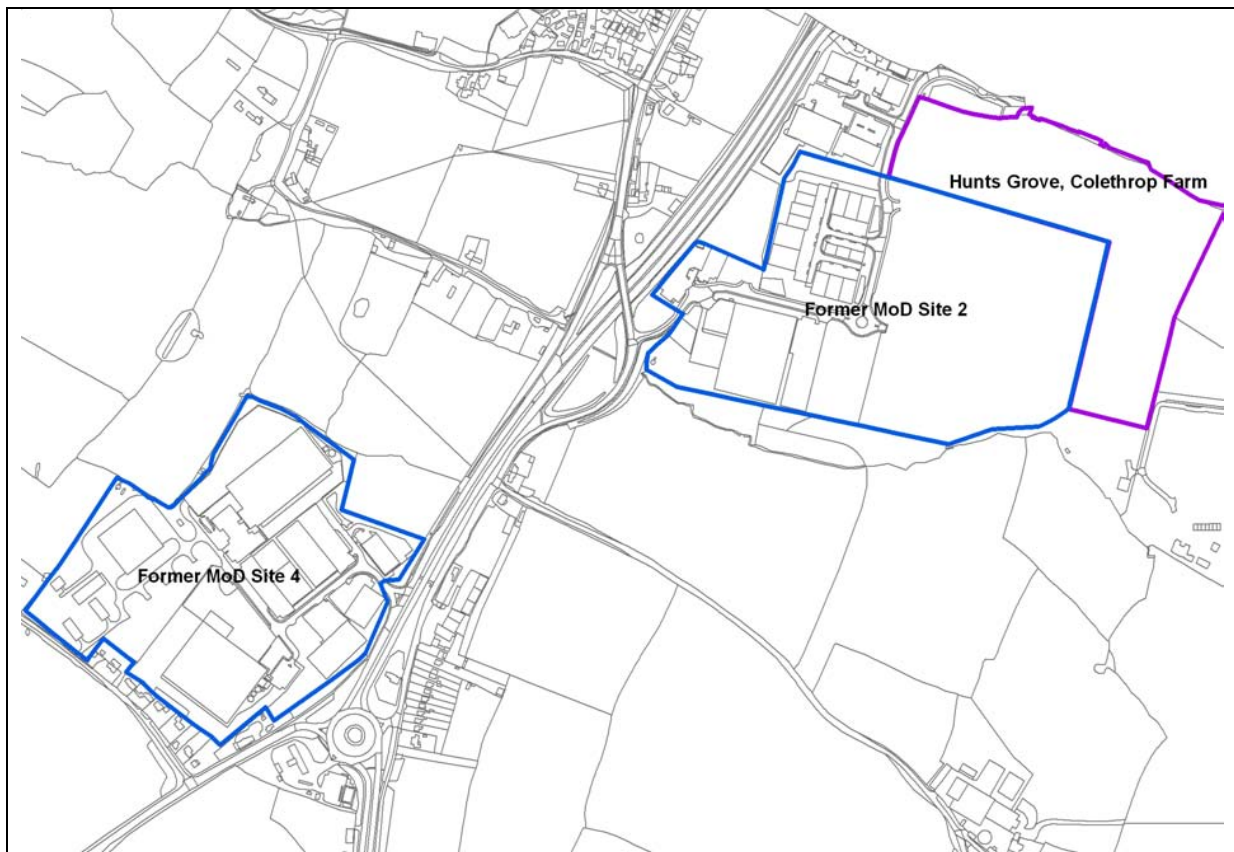
Area Reference	EM3, Site EK32
Name	Sharpness Docks, Sharpness
Description	Dock complex and adjacent secure distribution park
Occupier(s)	Multiple – Including Sharpness Waste Transfer Station and EMR Sharpness
Prominence	Low
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	59.29
Building Age	Various
Building Quality	Primarily Low
Access Constraints	-
Distance to M5 Motorway, km	16
Distance to A-road, km	5 – A38
Distance to Rail Station, km	12 – Cam and Dursley Station
Distance to Existing Bus Route, km	2 – Station Road
Distance to Services, km	3 – Berkeley local shops (Marybrook Street/Market Place)
Car Parking	Moderate – Varying parking provision across the area
Constraints	Partly in flood risk area. Adjacent key and Nationally Important Wildlife sites (some key sites within the Docks) Conservation Area to the north Some land in the north is allocated for waste uses Trees in the area
Critical Mass	Yes

<p>Opportunities for redevelopment/expansion</p>	<p>There are extensive areas of brownfield land across the docks, which could provide redevelopment/development opportunities. This includes 19.40 ha of allocated employment land (four sites, discussed further in Section 6.0). However, much of this redevelopment/expansion land is inaccessible, located within the secure dock estate, in use or constrained by site conditions (trees on site, former dock infrastructure on site, possible contamination).</p> <p>Discussions with stakeholders suggest that there is demand for industrial and logistics premises at Sharpness. However, that demand is focused at Severn Distribution Park (which has unused expansion land) rather than at the dock itself. Stakeholders feel that if the four allocated sites are ever brought forward it is likely to be for port related infrastructure rather than traditional B1/B2/B8 employment.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Sharpness Docks is a significant and unique facility in Stroud District, which accommodates a range of companies, including specialist port related uses. This area should therefore be protected as a port and logistics/distribution centre. However, the Council also need to be aware that (in the short/medium term at least) there is little demand to grow the Docks or deliver new employment uses at this isolated location.</p> <p>Any development is likely to be focused at the Severn Distribution Park, which has established itself as a significant sub-regional warehousing and distribution centre. The Distribution Park owner has aspirations to expand the Park beyond the present boundary, delivering some 64,000 sqm of additional floorspace to meet the needs of a Gloucestershire company. A planning application for this is expected in early 2013. The Council needs to determine if the area can support this growth, while endeavouring to ensure that the potential investment is not lost to another location.</p>



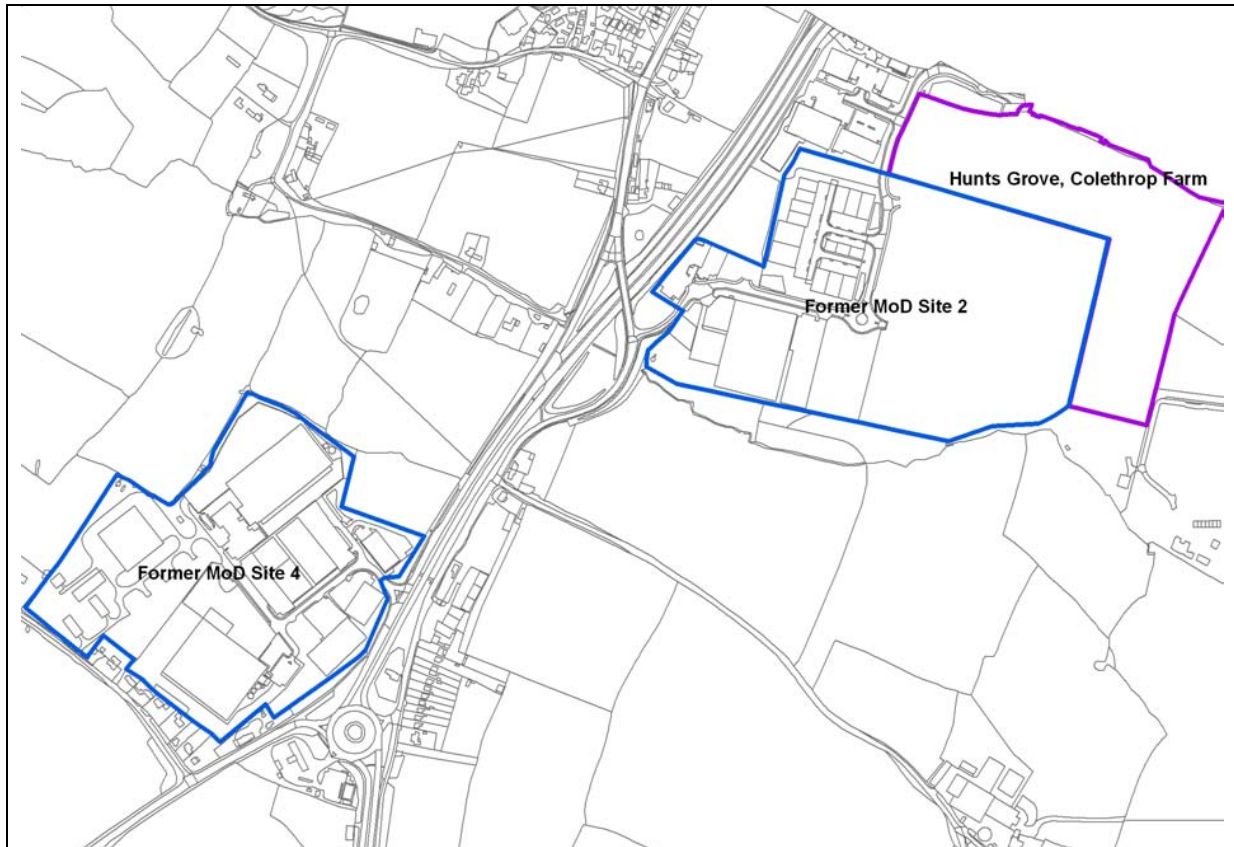
Area Reference	EM3, Site EK33
Name	Rigestate, Station Road, Berkeley
Description	Small industrial estate in an isolated rural location
Occupier(s)	Multiple – Including Mobex Exhibition Specialists
Prominence	Low
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	0.96
Building Age	Post 1960
Building Quality	Moderate
Access Constraints	Narrow, sloping access road
Distance to M5 Motorway, km	10
Distance to A-road, km	3 – A38
Distance to Rail Station, km	11 – Cam and Dursley Railway Station
Distance to Existing Bus Route, km	On bus route (Station Road)
Distance to Services, km	1 – Berkeley local shops (Marybrook Street/Market Place)
Car Parking	Poor – Limited parking available in front of the units
Constraints	Partly in flood risk area Sloping area Trees in the area
Critical Mass	No
Opportunities for redevelopment/ expansion	Small, dense industrial estate, bounded by railway line to the north. No redevelopment/ expansion options.
Other Information	-
Recommendations	Despite its isolated and constrained location, Rigestate appears well occupied and the area continues to provide reasonable quality industrial premises to local firms. The industrial estate should therefore be protected for employment uses.

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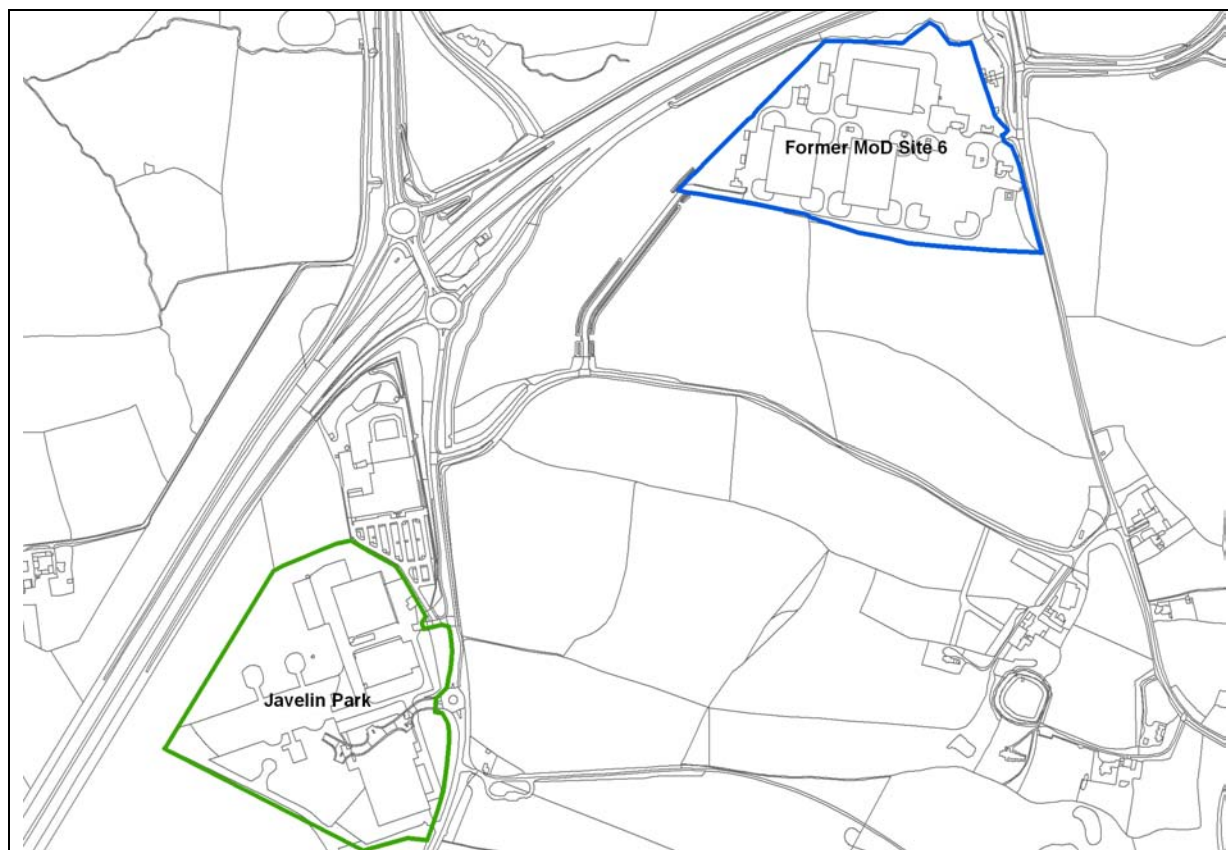
Area Reference	EM3, Site EK34
Name	Former MoD Site 4 (Quedgeley West Business Park), Quedgeley
Description	High quality, modern logistics park on a main road location, close to Junction 12, M5
Occupier(s)	Multiple – Including Downton and City Link.
Prominence	High
Current Use (Use Classes)	B2, B8
Size, ha	12.70
Building Age	Modern
Building Quality	Good
Access Constraints	Accessed off dual carriageway
Distance to M5 Motorway, km	1
Distance to A-road, km	Off A38
Distance to Rail Station, km	7 – Stonehouse Station (similar distance to Gloucester Station)
Distance to Existing Bus Route, km	On bus route (A38)
Distance to Services, km	0.1 – Petrol filling station and convenience store off Cross Keys Roundabout.
Car Parking	Good – Extensive parking available at all units
Constraints	Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/expansion	3.2 ha of unconstrained, brownfield expansion land remains available. This could provide some 12,077 sqm of additional B2, B8 accommodation. This land is on the market to provide design and build options of 929-9290 sqm. Additional expansion land is available in the north east, comprising the remains of a number of former MoD buildings.

Other Information	-
Recommendations	<p>Since 2007 the owner has successfully developed seven units in the area. Six of these have been delivered speculatively. There is continuing demand for premises – the unit recently vacated by Prestoplan is now being taken by an existing Stroud District based company for additional premises.</p> <p>.</p> <p>This is a successful strategic logistics park, serving Stroud District, Gloucester and the wider county. It also provides one of the few sources of readily available development land in the District, able to meet the needs of either, and inward investor or an existing large local firm looking to grow.</p> <p>The area should therefore be protected for employment uses, allowing appropriate further development on the identified expansion sites. This further development may include some B2 manufacturing uses as well as B8 warehousing and distribution premises. There is evidence of demand from industrial firms for such accommodation here.</p>



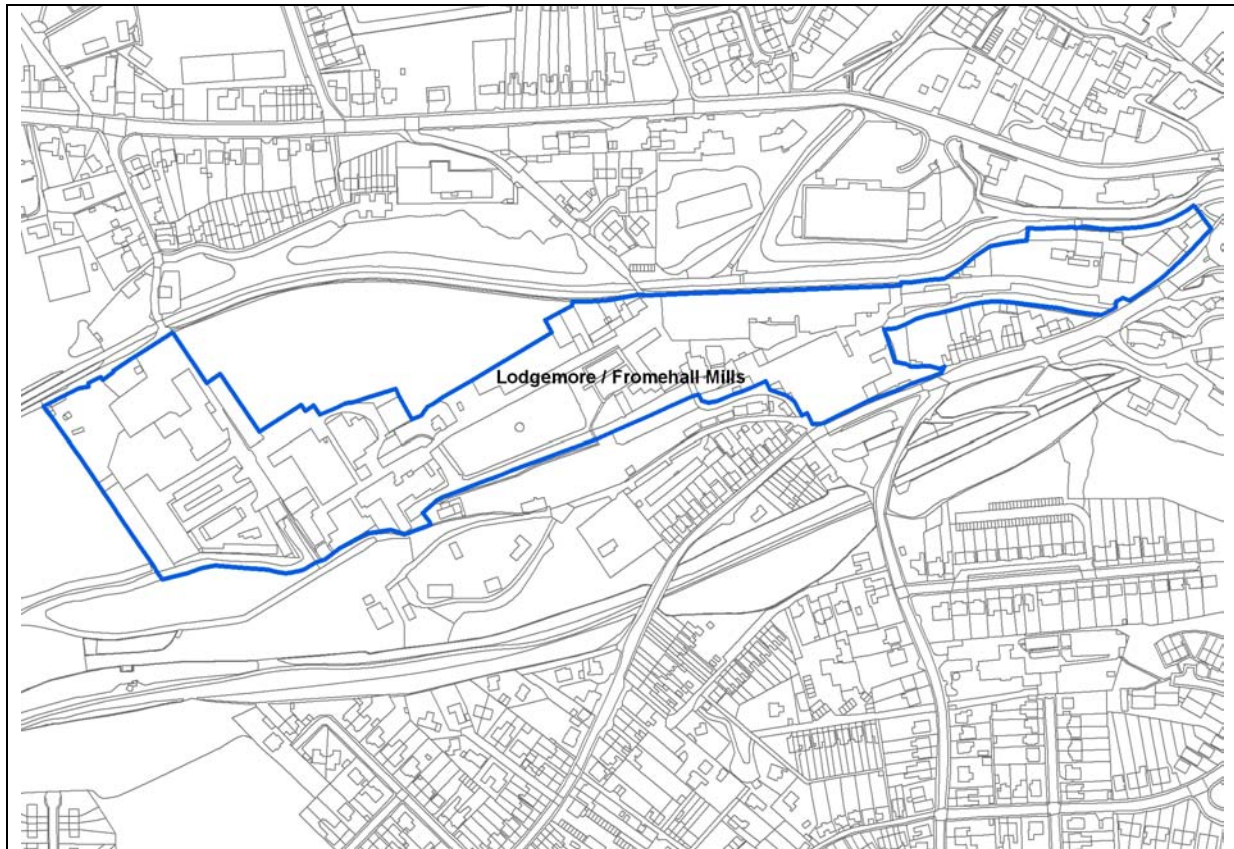
Area Reference	EM3, Site EK35
Name	Former MoD Site 2 (Gateway 12), Quedgeley
Description	Modern, low density business park, including substantial greenfield development land.
Occupier(s)	Multiple – Including Premier and SFC
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	15.44
Building Age	Modern
Building Quality	High
Access Constraints	-
Distance to M5 Motorway, km	1.4
Distance to A-road, km	0.1 – A38
Distance to Rail Station, km	7.4 – Stonehouse Station (similar distance to Gloucester Station)
Distance to Existing Bus Route, km	0.2 – A38
Distance to Services, km	0.7 – Petrol filling station and convenience store off Cross Keys Roundabout.
Car Parking	Good – Extensive parking available at all units
Constraints	Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/expansion	Most of the area has yet to be developed. Undeveloped land includes the adjoining employment site MU1: 'Hunts Gove, Colethrop Farm, Hardwicke' (5.75 ha). This land is on the market for design and build options of 465 sqm, or more. Although the site configuration prevents the development of larger B8 warehouses, adjustments to the site boundary, with the undeveloped land to the south, may be possible to accommodate the needs of a larger employer.

Other Information	-
Recommendations	<p>This is a successful business park, serving both Stroud District and Gloucester. It also one of the few sources of modern business units in the District.</p> <p>Along with nearby Quedgeley West Business Park, it is an important source of readily available development land, able to meet the needs of either, and inward investor or an existing large local firm looking to grow.</p> <p>The area should therefore be protected for employment uses, allowing appropriate further development on the identified expansion sites.</p>



Area Reference	EM3, Site EK36
Name	Former MoD Site 6 (Quedgeley East Business Park), Quedgeley
Description	Low quality former MoD complex, in a rural location close to Junction 12, M5
Occupier(s)	Multiple – Including On3 Ltd
Prominence	Low
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	9.63
Building Age	Pre 1945
Building Quality	Low
Access Constraints	Accessed via narrow rural roads
Distance to M5 Motorway, km	0.7
Distance to A-road, km	1.3 – A38
Distance to Rail Station, km	6.5 – Stonehouse Station
Distance to Existing Bus Route, km	0.3 – Gloucester Road
Distance to Services, km	1.6 – Petrol filling station and convenience store off Cross Keys Roundabout (also Blooms Garden Centre on Gloucester Road)
Car Parking	Poor – limited onsite parking available
Constraints	Trees in the area
Critical Mass	No
Opportunities for redevelopment/expansion	The owner has an option on 13.6 ha farmland between the motorway and the existing estate. Although not presently allocated for employment uses, this land could be combined with the redevelopment of Quedgeley East Business Park, to deliver a substantial new employment area in Stroud District. The owner will continue to promote this option through the planning process.
Other Information	-

Recommendations	<p>The present business park is of a low quality, although reasonably well occupied. However, combined with surrounding agricultural land, this area represents a significant redevelopment/development opportunity close to the M5. Such a development would be strategic in scale, benefiting Stroud District, Gloucester and the wider county. Among other options, it could provide a future logistics park to meet county warehousing and distribution requirements once Quedgeley West Business Park is fully developed. It is therefore recommended that this area be considered as an area of search for additional employment land (when required) in the development plan process.</p>
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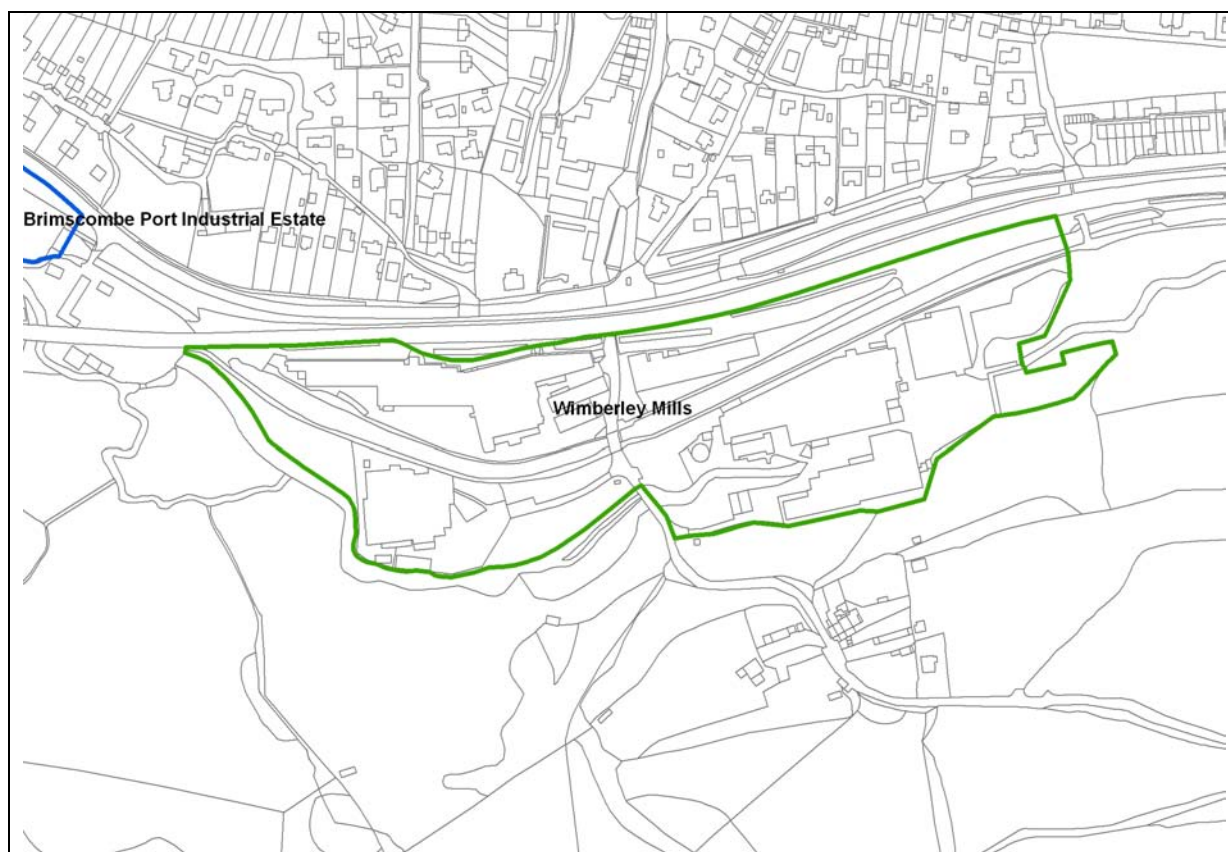
Area Reference	EM3, Site EK37
Name	Lodgemore/Fromehall Mills, Stroud
Description	Linear, canal side industrial estate, including historic mill complexes, close to Stroud Town Centre
Occupier(s)	Multiple – Including WSP Textiles
Prominence	Moderate
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	6.53
Building Age	Pre-1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	11
Distance to A-road, km	Off the A46 Bristol Road
Distance to Rail Station, km	0.3 – Stroud Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	0.1 – Stroud Town Centre
Car Parking	Poor – limited private parking for some units
Constraints	In flood risk area In Conservation Area Recreation areas and key wildlife sites adjacent Public footpath crosses the area. Trees in the area
Critical Mass	Yes

<p>Opportunities for redevelopment/ expansion</p>	<p>Although individual mill properties may provide some opportunities for refurbishment, the area as a whole appears well occupied and most land/property is in use. There is an area of undeveloped canal side land, between the Chestnut Lane and Lodgemore Lane canal bridges. This could be used to deliver further employment premises, possibly linked to the ongoing improvement works along the Thames Severn Canal. However, at the time of writing, there is no evidence that this backland site would be desirable to developers or occupiers.</p>
<p>Other Information</p>	<p>-</p>
<p>Recommendations</p>	<p>Lodgemore/Fromehall Mills is a significant employment area, prominently located close to the centre of Stroud Town. The area should therefore be protected for employment uses. Although, land is potentially available to support a further development of employment development, short/medium term change is likely to be limited to the refurbishment and improvement of the existing properties.</p>



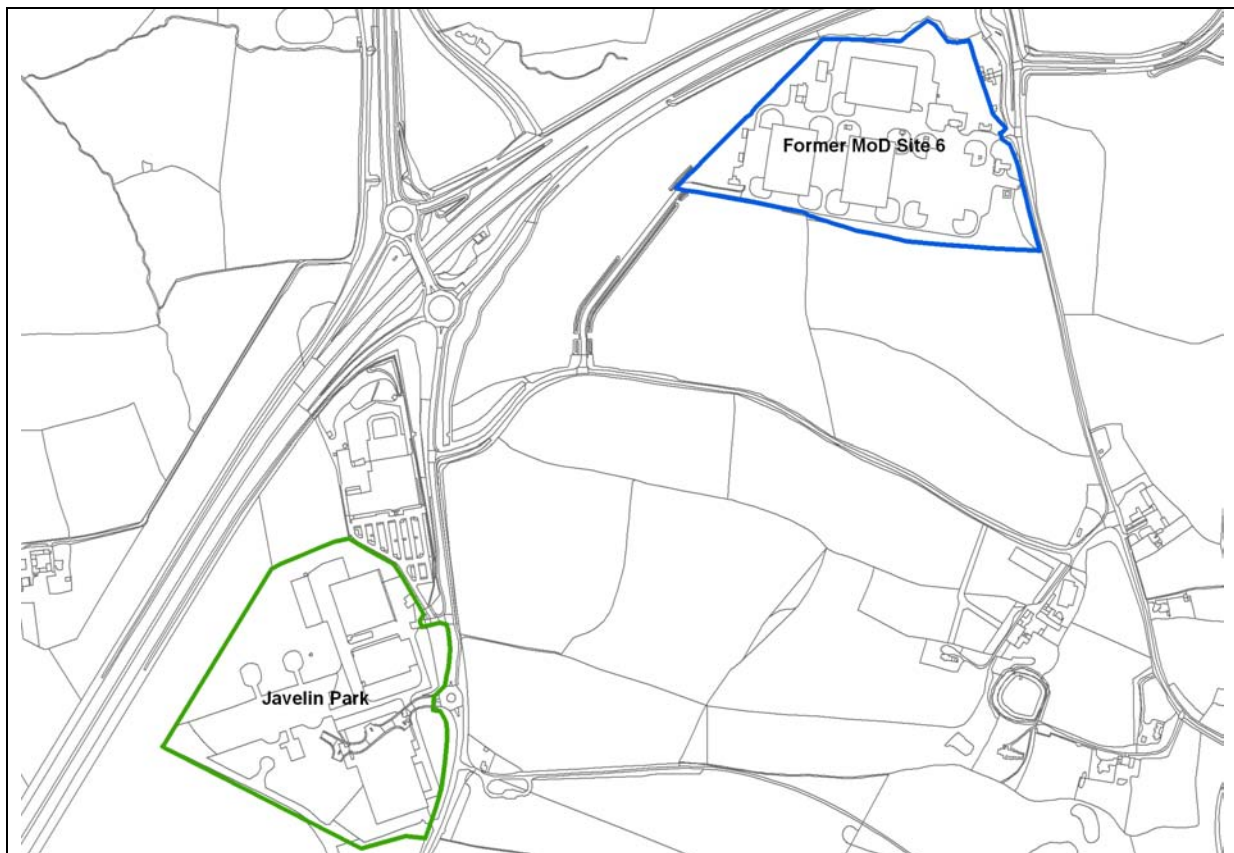
Area Reference	Additional Employment Area 1
Name	Aston Down, Chalford
Description	Former airfield properties, converted to provide budget quality employment premises in a rural area.
Occupier(s)	Multiple – Including Avon Scientific
Prominence	Low
Current Use (Use Classes)	B1(a, c), B2, B8
Size, ha	32.93
Building Age	(Partly) Pre 1945
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	16
Distance to A-road, km	0.6 – A419 Cowcombe Hill
Distance to Rail Station, km	8 – Stroud Station
Distance to Existing Bus Route, km	0.1 – Cirencester Road
Distance to Services, km	4 – Bussage local shops (Tanglewood Way)
Car Parking	Good– Extensive onsite parking available
Constraints	In the Cotswold AONB Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Some 7,757 sqm of industrial and office accommodation is available. The owner has identified several growth options which they wish to pursue. These include the use of compound areas totalling 2.2 ha (a planning application to bring these into employment use failed at appeal in 2009). Also the development of further employment uses on the outer areas of the site (linked to housing proposals) and potentially the redevelopment of some hangar space to provide a mixed use (residential and employment) scheme.

Other Information	East of the site is within the Cotswold local authority area.
Recommendations	Aston Down is a significant employment area with the Stroud Valleys, with an owner who has aspirations for further growth and investment. Although some of the growth proposals put forward may not be appropriate in the Cotswold AONB, the existing estate is sufficiently established to warrant allocation as a employment area for B1(a, c), B2, B8 employment uses in the development plan



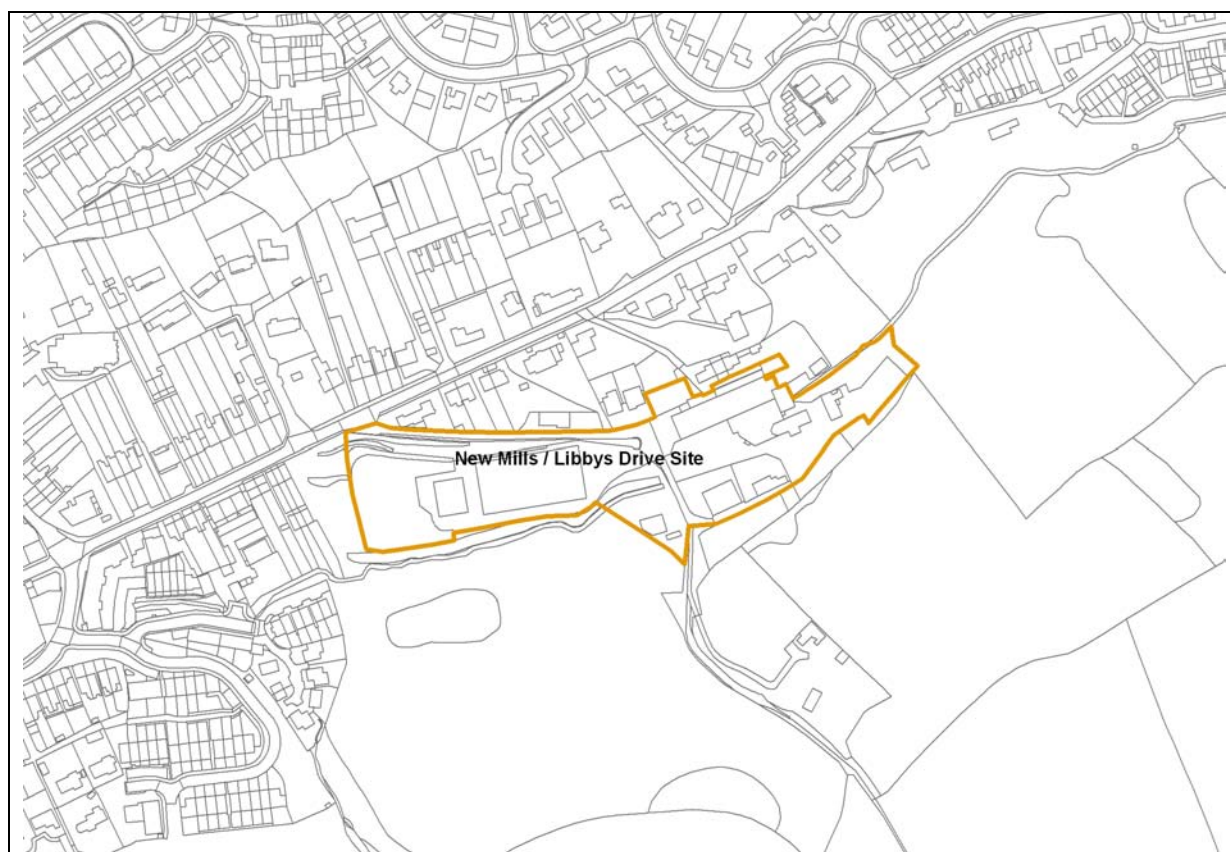
Area Reference	Additional Employment Area 2
Name	Wimberley Mills, London Road, Thrupp
Description	Budget quality industrial and mill complex, located north and south of the River Frome
Occupier(s)	Multiple – Including Pvc-U Products
Prominence	Low
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	6.46
Building Age	Pre 1945
Building Quality	Moderate
Access Constraints	Access from the A419 London Road is via a narrow rail bridge.
Distance to M5 Motorway, km	12
Distance to A-road, km	0.1 - A419 London Road
Distance to Rail Station, km	4 – Stroud Station
Distance to Existing Bus Route, km	0.1 - A419 London Road
Distance to Services, km	3.5 – Bussage local shops (Tanglewood Way)
Car Parking	Moderate – Limited parking available at some units
Constraints	In flood risk area In Conservation Area Trees in the area River and public footpaths pass through area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Estate appears fully developed, with most property in use. Further expansion would not be possible without the loss of greenfield land, within the Cotswold AONB.
Other Information	-

Recommendations	Wimberley Mills continues to function as a small, moderately successful, industrial employment area in the Stroud Valleys. It is not dissimilar to the other adopted employment areas along London Road and should therefore be allocated as a employment area (for B1 (a, c), B2, B8 employment uses), alongside these other areas, in the development plan.
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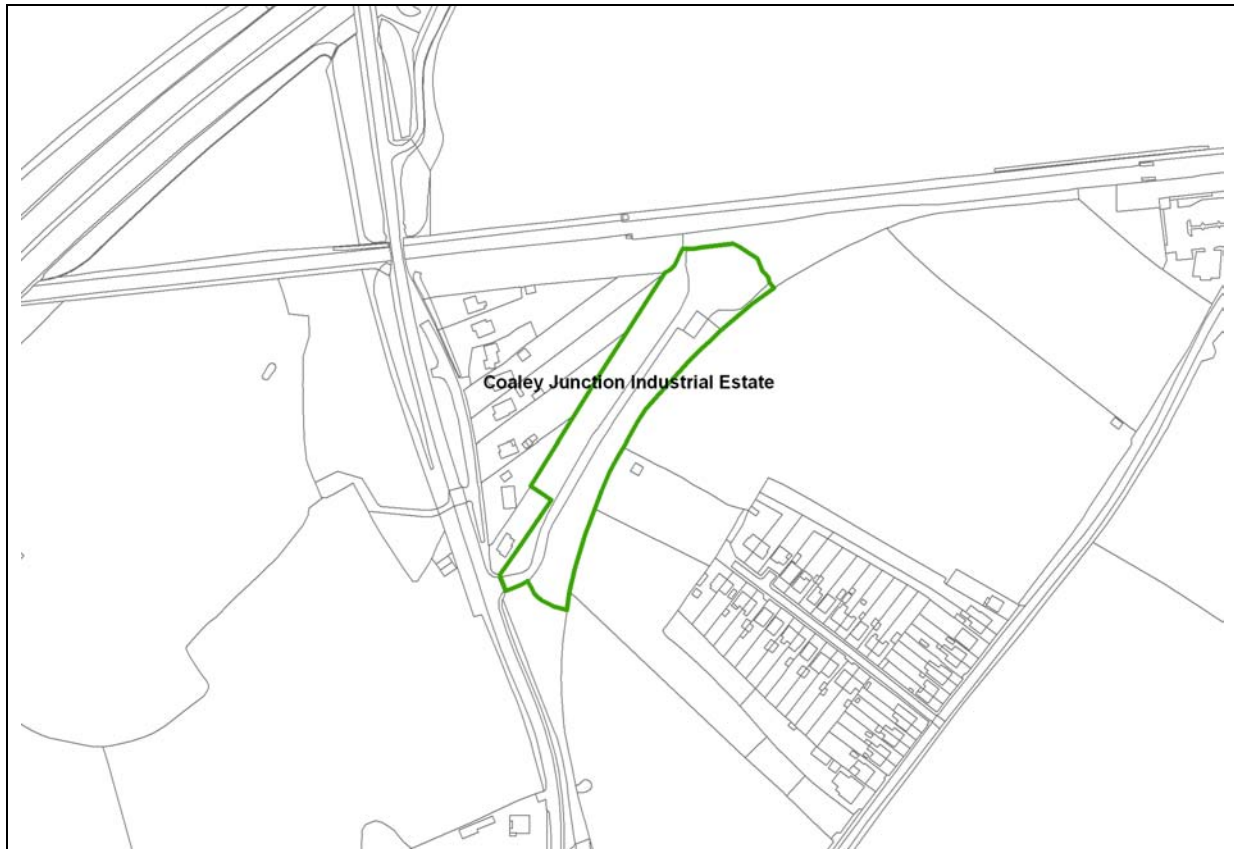
Area Reference	Additional Employment Area 3
Name	Javelin Park, Gloucester Road, Quedgeley
Description	Cleared industrial site, adjacent to garden centre, off Junction 12, M5
Occupier(s)	Vacant
Prominence	High
Current Use (Use Classes)	Vacant
Size, ha	11.23
Building Age	N/A
Building Quality	N/A
Access Constraints	-
Distance to M5 Motorway, km	0.4
Distance to A-road, km	1.3 – A38
Distance to Rail Station, km	6.3 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Gloucester Road)
Distance to Services, km	1.3 – Petrol filling station and convenience store off Cross Keys Roundabout (also Blooms Garden Centre on Gloucester Road)
Car Parking	None at present
Constraints	Foundations of cleared buildings onsite. Electricity substation onsite Trees in the area
Critical Mass	No

Opportunities for redevelopment/ expansion	Gloucestershire County Council purchased part of this site two years ago and now proposes the development of a waste incinerator (energy from waste) plant. Planning permission is being pursued, with the aim to build the incinerator by 2014/15.
Other Information	Presently a waste allocation in the Local Plan
Recommendations	The future of this site is dependant on the plans of Gloucestershire County Council. If the waste incinerator proposal does not go ahead then this would make a valuable employment allocation, providing the opportunity to deliver further B1, B2, B8 uses close to Junction 12, M5. Such a development site could complement the expansion proposals at nearby Quedgeley East Business Park (Site EK36).



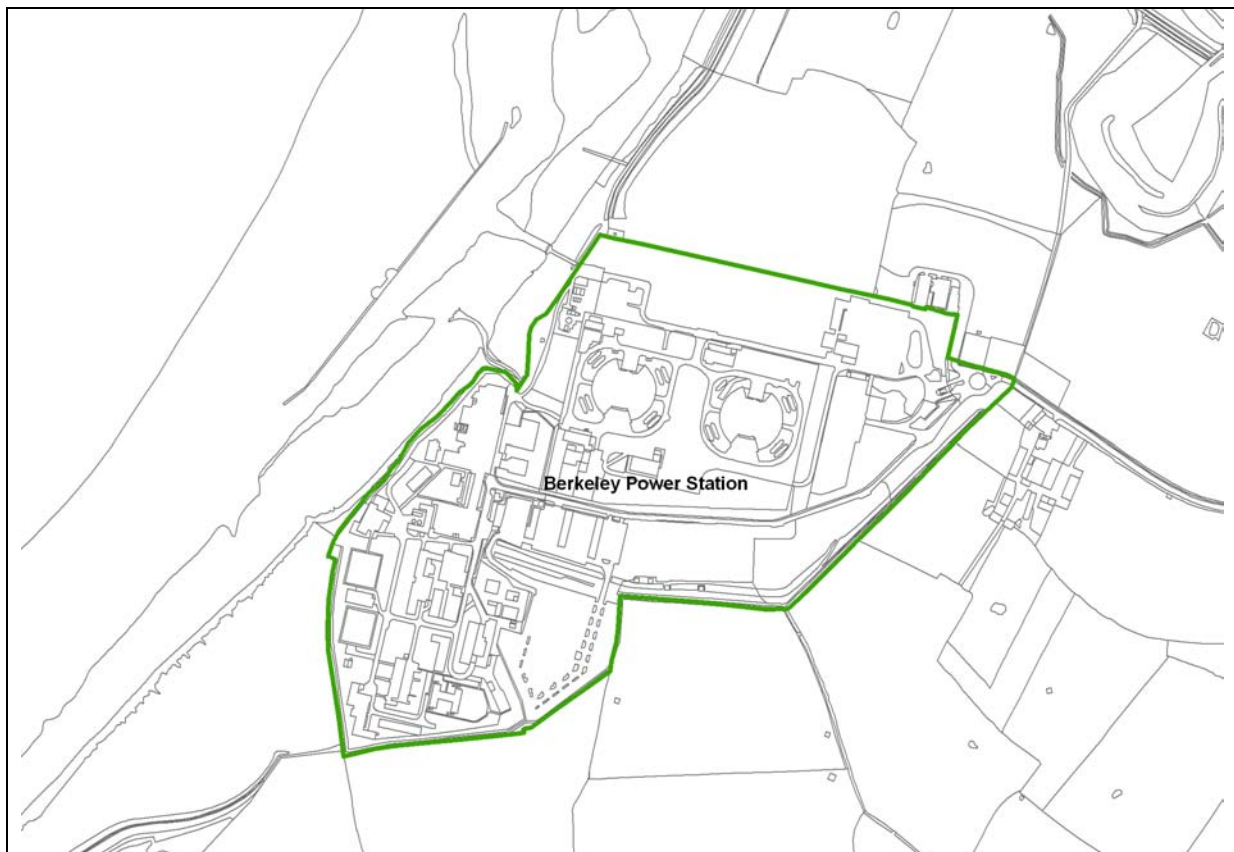
Area Reference	Additional Employment Area 4
Name	New Mills/Libbys Drive Site, Stroud
Description	Small, budget quality industrial and mill complex, to the rear of housing.
Occupier(s)	Multiple – Including Rycote
Prominence	Low
Current Use (Use Classes)	B1(c), B2, B8
Size, ha	1.58
Building Age	Pre 1945
Building Quality	Moderate
Access Constraints	Libbys Drive is narrow and sloping
Distance to M5 Motorway, km	10
Distance to A-road, km	0.8 - A46 Beeches Green
Distance to Rail Station, km	1 – Stroud Station
Distance to Existing Bus Route, km	0.4 - Slad Road
Distance to Services, km	0.8 – Stroud Town Centre
Car Parking	Moderate – Limited parking available at some units
Constraints	In flood risk area Trees in the area Housing adjacent
Critical Mass	Yes
Opportunities for redevelopment/ expansion	The majority of the estate, including 704 sqm of partly occupied workshops and a 0.06 ha site is on the market, for sale, as an investment or development opportunities (asking price is £482.93/sqm). Possible redevelopment options include housing. The site had a previous full planning permission, now lapsed, for 3-4 townhouses. Further expansion of the area is prevented by adjacent uses and the sloping topography of the surrounding valley.

Other Information	-
Recommendations	The bulk of the area is presently for sale, as either an investment or redevelopment opportunity. However, the buildings on the market continue to support a number of tenants and appear (reasonably) well occupied. The loss of these properties to other, possibly residential uses, should not therefore be encouraged. In addition, and notwithstanding the previous permission for town houses, this sheltered backland site would seem a poor location for housing. It is therefore recommended that the New Mills/Libbys Drive Site be allocated as a employment area for B1(a, c), B2, B8 employment uses in the development plan



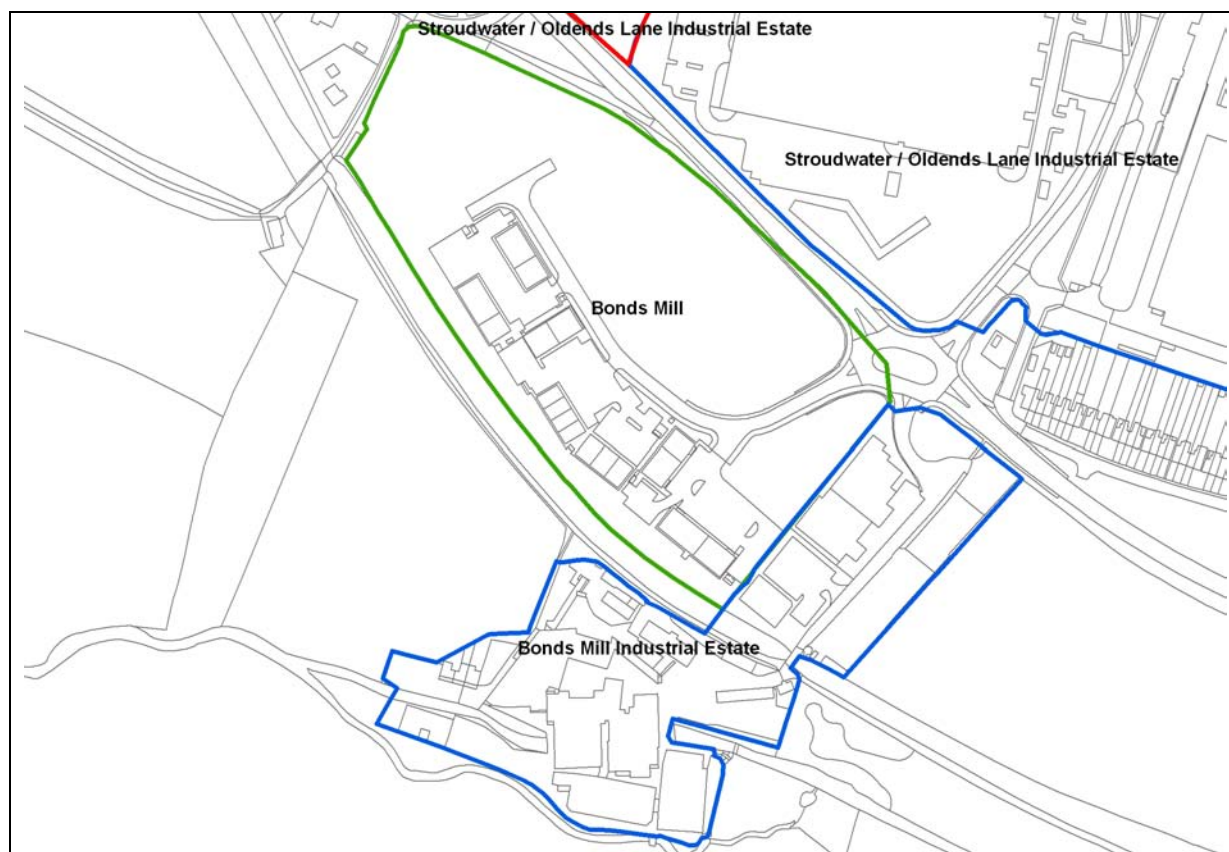
Area Reference	Additional Employment Area 5
Name	Coaley Junction Industrial Estate, Draycott, Cam/Dursley
Description	Rural open storage yard (former rail yard), in an edge of settlement location off a main road
Occupier(s)	Primarily CPI Distribution
Prominence	High
Current Use (Use Classes)	B8
Size, ha	0.95
Building Age	Pre 1945 (includes former railway engine shed)
Building Quality	Moderate
Access Constraints	-
Distance to M5 Motorway, km	7
Distance to A-road, km	Off the A4135 Draycott
Distance to Rail Station, km	1 – Cam and Dursley Station
Distance to Existing Bus Route, km	On bus route (Draycott)
Distance to Services, km	0.6 – Petrol filling station and convenience store, Draycott
Car Parking	Good – Open land provides significant parking opportunities
Constraints	Trees in the area
Critical Mass	No
Opportunities for redevelopment/expansion	The bulk of the area comprises cleared land, some of which is in use for open storage. Thus apart from the railway engine shed, the whole area can be said to represent a rural, brownfield development opportunity.
Other Information	-

Recommendations	At present the area is in use by CPI Distribution (with some storage space offered to other firms). However, should the land become vacant then it would provide a brownfield development site which could support a range of uses including B1, B2, B8 employment or, if required, non-employment uses.
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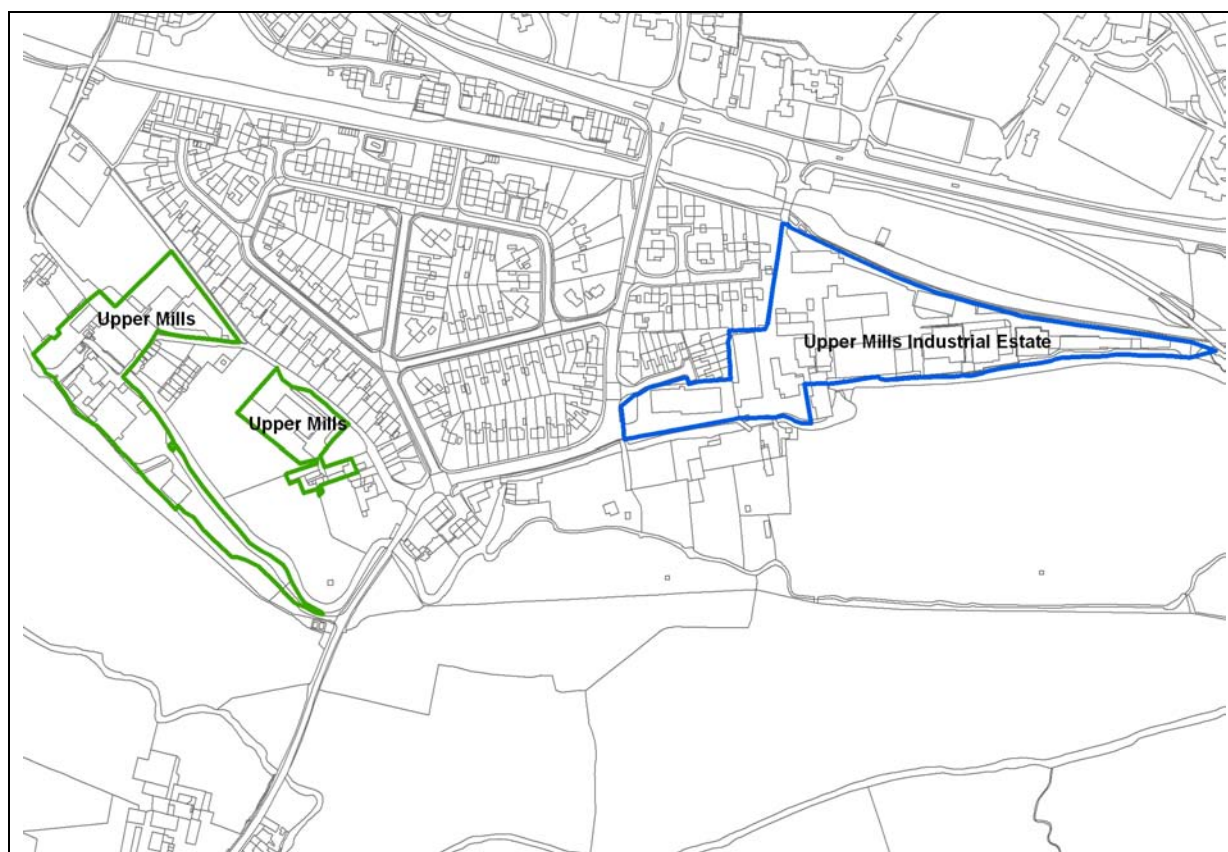
Area Reference	Additional Employment Area 6
Name	Berkeley Power Station, Berkeley
Description	A decommissioned nuclear power station (which remains licensed and not available for development) along with delicensed office/lad accommodation (The Berkeley Centre), in a rural location by the River Severn
Occupier(s)	Magnox and Babcock
Prominence	Low
Current Use (Use Classes)	B1(a, b, c), B8
Size, ha	31.89
Building Age	Post 1945
Building Quality	Good
Access Constraints	-
Distance to M5 Motorway, km	16
Distance to A-road, km	5 - A38
Distance to Rail Station, km	12 – Cam and Dursley Station
Distance to Existing Bus Route, km	Previous bus links to the Power Station
Distance to Services, km	2 – Berkeley local shops (Marybrook Street/Market Place)
Car Parking	Good – Extensive onsite parking available
Constraints	In flood risk area Adjacent to Internationally Important Wildlife Site Recreation space adjacent Trees in the area
Critical Mass	No

Opportunities for redevelopment/ expansion	Office, industrial and lab space within the Power Station will now be offered as a business park (The Berkeley Centre) for a range of occupiers, including those associated with the nuclear, environmental sciences and high tech sectors. The present owners/occupiers feel that the area will come to house a cluster of nuclear businesses, supporting future development proposals at Oldbury.
Other Information	-
Recommendations	The area which forms the Berkeley Centre should be allocated as a employment area for B1 (a, b, c), B8 employment uses in the development plan.



Area Reference	Additional Employment Area 7
Name	Bonds Mill (Stonehouse Park), Bristol Road, Stonehouse
Description	High quality, modern office park combined with greenfield expansion land, at a canal side location.
Occupier(s)	Multiple – Including Griffith Clarke and Sanctus
Prominence	High
Current Use (Use Classes)	B1 (a)
Size, ha	5.04
Building Age	New
Building Quality	High
Access Constraints	-
Distance to M5 Motorway, km	2
Distance to A-road, km	Fronts A419 Bristol Road
Distance to Rail Station, km	2 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Bristol Road)
Distance to Services, km	1 – Stonehouse Town Centre
Car Parking	Good – The dense nature of the area means that only limited parking can be provided for each unit.
Constraints	In a key wildlife site Canal side footpath passes next to the area Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	2.4 ha remain undeveloped. This includes options for a Phase 4 of Stonehouse Office Park (1,858 sqm) which is likely to be delivered (at least in part) speculatively in the short term. Elsewhere the owner would also wish to develop a pub/restaurant. An application for such a use was refused three years ago.
Other Information	-

Recommendations	<p>Stonehouse Park is an important employment area in Stroud District as it the only source of modern, self-contained office properties in the local authority area. The Park should therefore be protected for this use in the development planning process.</p> <p>Future proposals that would allow the delivery of more such good quality office space should be encouraged. Proposals to deliver ancillary uses, such as a pub-restaurant, which are likely to improve the attractiveness of Stonehouse Park to potential occupiers (and would also serve adjacent Stroudwater Industrial Estate and Bonds Mill) should also be encouraged, providing any planning/highways constraints can be overcome.</p>
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Area Reference	Additional Employment Area 8
Name	Upper Mills, Stonehouse
Description	Two small, moderate quality industrial areas on edge of settlement locations, south of Stonehouse.
Occupier(s)	Multiple – Including Stonehouse Paper Bag Mills (occupy the smaller site) and Bennetts Transport.
Prominence	Low
Current Use (Use Classes)	B1(c)/B2/B8
Size, ha	1.77
Building Age	Various
Building Quality	Moderate
Access Constraints	Access to the southern site is via unsurfaced roads.
Distance to M5 Motorway, km	3.4
Distance to A-road, km	0.1 – A419 Bristol Road
Distance to Rail Station, km	1.4 – Stonehouse Station
Distance to Existing Bus Route, km	On bus route (Downton Road)
Distance to Services, km	1 – Stonehouse Town Centre
Car Parking	Moderate – Parking available in front of some units
Constraints	In flood risk area Northern units are within a Conservation Area Partly within a key wildlife site Housing adjacent Trees in the area
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Dense, linear industrial estate with all land and premises in use. Further growth of the area is prevented by surrounding uses, including land of ecological value to the south.
Other Information	-

Recommendations	A small, established industrial area, which houses several larger local employers. The area should therefore be allocated as a employment area for B1 (a, c), B2, B8 employment uses in the development plan.
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Area Reference	Additional Employment Area 9
Name	Land at Lister Petter, Dursley
Description	Edge of settlement site, in the process of being redeveloped for a mix of uses. Vale Community Hospital and industrial units are presently in place.
Occupier(s)	Multiple – Including Everholt
Prominence	Moderate
Current Use (Use Classes)	B1(c)/D1
Size, ha	4.90
Building Age	New
Building Quality	Good
Access Constraints	New access roads mostly completed.
Distance to M5 Motorway, km	3.4
Distance to A-road, km	0.3 – A4135 Kingshill Road
Distance to Rail Station, km	4 – Cam and Dursley Station
Distance to Existing Bus Route, km	0.4 – A4135 Kingshill Road
Distance to Services, km	1 – Dursley Town Centre
Car Parking	Parking to be completed
Constraints	Partly in flood risk area Housing adjacent
Critical Mass	No
Opportunities for redevelopment/ expansion	The remaining employment land is likely to be taken up by the relocation of Lister Shearer. Land at this location is may also accommodate a second large local employer (Lister Petter).
Other Information	At present progress (across the wider mixed-use scheme) is being inhibited by an application for a village green which, if implemented, would make delivery of the access road difficult.
Recommendations	Emerging employment area which will include accommodation for a major local employer. The area should therefore be allocated as a employment area for B1(c), B2, B8 employment uses in the development plan.

APPENDIX 10 COMPANY SURVEY QUESTIONNAIRE



Stroud District Business Survey 2012



Company Details

Company Name	
Contact Name	
Position	
Address	
Email Address	
Tel No	
Business Activity	

Employees

1. Number of: **full-time** employees _____ and/or **part-time** employees _____

2. Did your business start up in your present location?

Yes If **Yes**, what year was the business registered? _____

No If **No**, what year did you relocate to Stroud District? _____

And (*if no*) where were you previously located?

Within Stroud District Within Gloucestershire

Within the South West region Within the UK

From overseas

3. How do you expect your business to grow within the next 0-5 years?

Moderate growth Significant growth Closure

Same Reduced operation

Current Accommodation

4. Type of accommodation (please tick main type/use)

Office Serviced office

Industrial Warehouse

High-tech/lab Barn conversion/Farm location

Site (undeveloped land)

5. Is the property:

Owned Rented

6. Size of unit:

0-100 sqm (0-1076 sqft)	<input type="checkbox"/>	101-200 sqm (1077-2152 sqft)	<input type="checkbox"/>	201-500 sqm (2153-5382 sqft)	<input type="checkbox"/>
501-1000 sqm (5383-10,764 sqft)	<input type="checkbox"/>	1001-2000 sqm (10,765-21,529 sqft)	<input type="checkbox"/>	2001-5000 sqm (21,530-53,821 sqft)	<input type="checkbox"/>

Larger, sqm _____

Site size, hectares/acres _____

7. How satisfied are you with your current accommodation?

Very satisfied	<input type="checkbox"/>	Satisfied	<input type="checkbox"/>
Unsatisfied	<input type="checkbox"/>	Very unsatisfied	<input type="checkbox"/>

8. If you are unsatisfied or very unsatisfied, please state your reasons.

Future Accommodation

9. Are you considering moving premises within the next:

12 months?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
2-3 years?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If yes to either of the above, please respond to questions 10a – 10i, otherwise go directly to question 11.

10a. What type of accommodation will you be looking for? (please tick main type/use)

Office	<input type="checkbox"/>	Industrial	<input type="checkbox"/>	Serviced office	<input type="checkbox"/>
Warehouse	<input type="checkbox"/>	Site (undeveloped land)	<input type="checkbox"/>	Barn conversion/Farm location	<input type="checkbox"/>
High-tech/Lab	<input type="checkbox"/>				

10b. Tenure required?

Freehold	<input type="checkbox"/>	Leasehold	<input type="checkbox"/>	No Preference	<input type="checkbox"/>
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10c. Quality of premises preferred?

Prestigious/New	<input type="checkbox"/>	Moderate	<input type="checkbox"/>
Basic/Budget	<input type="checkbox"/>	No Preference	<input type="checkbox"/>

10d. Will this be **additional** or **alternative** to existing property?

10e. What size of unit/site will you be looking for?

0-100 sqm (0-1076 sqft)	<input type="checkbox"/>	101-200 sqm (1077-2152 sqft)	<input type="checkbox"/>	201-500 sqm (2153-5382 sqft)	<input type="checkbox"/>
501-1000 sqm (5383-10,764 sqft)	<input type="checkbox"/>	1001-2000 sqm (10,765-21,529 sqft)	<input type="checkbox"/>	2001-5000 sqm (21,530-53,821 sqft)	<input type="checkbox"/>
Larger, sqm	_____				
Site size, hectares/acres	_____				

10f. General location – please indicate preferred areas(s) below:

Stroud (Town)	<input type="checkbox"/>	Stroud Valleys	<input type="checkbox"/>	Nailsworth	<input type="checkbox"/>
Berkeley	<input type="checkbox"/>	Wotton-under-Edge	<input type="checkbox"/>	Chalford/Eastcombe	<input type="checkbox"/>
Quedgeley area Business Parks	<input type="checkbox"/>	Cam	<input type="checkbox"/>	Cam/Dursley	<input type="checkbox"/>
Anywhere in District	<input type="checkbox"/>	Elsewhere in Gloucestershire	<input type="checkbox"/>		
Within Stroud Rural Area (please specify):	_____				
Other (please specify):	_____				

10g. Location type preferred:

Town centre	<input type="checkbox"/>	Industrial estate	<input type="checkbox"/>
Business park	<input type="checkbox"/>	Rural	<input type="checkbox"/>

10h. What do you consider to be the most important factor when seeking alternative accommodation? Please state below.

10i. Will the move result in additional jobs being created?

Yes No

If yes, how many? _____

11a. Please rate 1-5 how important the following are for your business:

Not important	=	<input type="text" value="1"/>	Very important	=	<input type="text" value="5"/>
Road access					<input type="text"/>
Public transport links					<input type="text"/>
IT/telecommunications					<input type="text"/>
Located close to suppliers					<input type="text"/>
Located close to customer base					<input type="text"/>
Suitable labour pool					<input type="text"/>
Suitable local skills base					<input type="text"/>
Low staff turnover					<input type="text"/>
Local education and training facilities					<input type="text"/>
Quality of life and environment					<input type="text"/>
Land prices					<input type="text"/>
Current premises are of good value					<input type="text"/>
Current premises are of good quality					<input type="text"/>
Availability of good quality alternative premises					<input type="text"/>
Availability of affordable alternative premises					<input type="text"/>
Access to finance					<input type="text"/>

11b. Please rate 1-5 how well your site performs against the following:

Poor	=	<input type="text" value="1"/>	Excellent	=	<input type="text" value="5"/>
Road access					<input type="text"/>
Public transport links					<input type="text"/>
IT/telecommunications					<input type="text"/>
Located close to suppliers					<input type="text"/>
Located close to customer base					<input type="text"/>
Suitable labour pool					<input type="text"/>
Suitable local skills base					<input type="text"/>
Low staff turnover					<input type="text"/>
Local education and training facilities					<input type="text"/>
Quality of life and environment					<input type="text"/>
Land prices					<input type="text"/>
Current premises are of good value					<input type="text"/>
Current premises are of good quality					<input type="text"/>
Availability of good quality alternative premises					<input type="text"/>
Availability of affordable alternative premises					<input type="text"/>
Access to finance					<input type="text"/>

11c. Would any of the above issues, or any other issues not mentioned, influence you to remain in or leave Stroud District, or are providing barriers to your company's growth?

Business Support

Government support is focused on helping companies to grow. Would you like to receive further information on government backed programmes related to:

Manufacturing	<input type="checkbox"/>	Innovation	<input type="checkbox"/>	Exporting	<input type="checkbox"/>
Apprenticeships	<input type="checkbox"/>	Business coaching	<input type="checkbox"/>	Research and development	<input type="checkbox"/>
Business mentoring	<input type="checkbox"/>	Access to finance	<input type="checkbox"/>		

Additional Comments

12. If you have any additional comments affecting your choice of premises or growth prospects please use the space below.

Please indicate if you are happy to be contacted for further research YES / NO

Thank you for your assistance.
All responses will be treated in confidence.
If you would like any further information on this survey please contact Christopher Wilson at
BE Group on 01925 822112.

Please return the questionnaire by the 26th October 2012 using the enclosed pre-paid reply envelope or fax back to 01925 822113. If you prefer, you can complete an online version of this questionnaire by visiting: www.begroup.uk.com



Appendix 11a - Company Survey Responses Assessment, Part 1																
Question 11a - Please rate 1-5 how important the following are for your business:										Not important = 1		Very important = 5				
Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Berkeley																
Berkeley		5	1	1			3	3								
Berkeley		5	1	5	1	1	5	5	5	1	1	1	5	2	5	5
Bisley		4	4	5	1	1	3	3	5	3	5	1	4	5	3	3
Bisley		5	3	5	1	5	5	3	5	4	5	3	5	5	1	1
Brimscombe		5	5	5	1	1	3	3	4	3	3	3	5	5	3	3
Brimscombe		5	1	5	1	1	4	4	5	3	3	3	5	3	1	1
Brimscombe		5	1	5	1	1	3	3	4	3	3	3	3	3	3	3
Cam/Dursley																
Cam/Dursley		5	4	5	3	3	5	5	5	4	4	5	5	5	5	3
Cam/Dursley																
Cam/Dursley		5	2	5	1	1	3	3	3	4	3	1	1	1	1	1
Cam/Dursley																
Cam/Dursley																
Cam/Dursley		4	1	5	1	1	4	4	4	3	3	3	4	4	1	1
Cam/Dursley		5	3	5	3	1	5	5	5	3	3	4	3	3	5	5
Cam/Dursley		5	3	5	1	3	5	5	5	5	5	5	5	5	5	5
Cam/Dursley		5	1	5	4	3	1	1	4	1	4	1	5	5	1	1
Cambridge		2	1	5	1	3	5	4	4	4	5	3	4	4	5	5
Chalford		5	3	5	1	5	1	N/A		1	5	N/A	5	5	N/A	N/A
Chalford		5	1	5	3	4	4	4	4	3	4	4	5	5	2	2
Chalford		5	5	5	1	1	4	1	5	1	3	5	4	3	3	4
Chalford		5	1	5	1	4	4	2	5	1	3	5	5	5	3	4
Horsley		1	3	5	3	1	1	1	5	1	5	1	1	5	1	1
Miserden																
Nailsworth		5	3	5	1	1	4	5	5	5	3	3	4	4	4	3
Nailsworth		5	4	5	1	1	5	5	4	4	4	5	3	2	5	4
Painswick		5	3	5	2	4	5	5	5	3	5	3	5	5	2	2

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Quedgeley																
Quedgeley																
Quedgeley	5	1	5	2	1	4	3	5	4	3	5	4	4	5	4	3
Quedgeley	5	2	5	1	1	5	5	5	4	5	5	5	5			3
Quedgeley	5	5	5	3	3	5	5	5	5	5	5	5	5	5	5	5
Quedgeley	5	1	5	2	1	3	3	5	3	4	1	5	5	1	1	1
Quedgeley	5	2	5	1	5	5	5	5	5	5	5	5	5	1	1	3
Quedgeley	4	2	5	2	1	4	4	5	2	3	4	4	4	5	5	2
Saul	5	1	5	3	1	5	2	5	1	5	3	5	4	5	5	5
Sharpness	5	2	5	1	1	5	4	4	3	5	5	5	5	5	5	2
Sharpness	5	5	5	5	5	5	5	5	5	5	5	5	5	3	3	3
Stonehouse	5	1	5	3	4	4	3	5	3	4	1	5	5	2	2	1
Stonehouse	5	1	1	1	1	3	1	2	3	4	5	5	5	1	1	5
Stonehouse																
Stonehouse	5	3	3	3	1	5	5	4	4	3	1	3	3	1	1	1
Stonehouse																
Stonehouse	5	5	5	5	5	5	5	5	5	5	5	5	3	2	2	4
Stonehouse	5	4	5	3	2	5	4	4	5	4	5	4	4	5	5	5
Stonehouse																
Stonehouse																
Stonehouse	5	3	4	3	4	3	3	3	2	5	3	2	5	1	1	2
Stonehouse																
Stonehouse	5	5	4	4	5	5	5	5	3	5	5	5	5	4	4	5
Stonehouse	5	1	4	2	5	3	3	4	2	2	2	2	2	2	2	1
Stonehouse	5	1	1	1	4	1	1	4	1	2	1	4	2	5	5	5
Stonehouse	5	3	5	4	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	5	3	5	4	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	4	1	5	3	2	4	4	4	2	4	5	4	5	4	4	2
Stonehouse	4	4	4	1	3	5	4	5	4	5	4	4	4	3	3	5
Stonehouse	5	4	5	1	1	4	5	5	5	3	1	2	1	1	2	1
Stonehouse	5	3	3	2	3	3	3	5	5	4	5	2	3	1	1	5
Stonehouse	5	1	5	3	1	5	4	4	1	3	5	5	5	5	5	3
Stonehouse	5	2	4	1	4	2	2	2	2	2	2	2	3	4	4	1

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Stroud	4	2	1	3	3	1	1	1	1	1	3	5	2	2	5	2
Stroud																
Stroud	5	5	5	1	1	4	5	5	4	5	5	5	5	1	1	1
Stroud	5	2	5	2	2	4	4	4	2	5	1	2	2	2	2	2
Stroud																
Stroud			5													
Stroud	1	1	1	3	3	1	1	1	1	3	1	5	5	1	1	5
Stroud	5	3	5	1	5	4	4	5	4	5	5	5	5	2	4	5
Stroud	5	1	5	1	1	1	1	5	1	1	1	5	5	1	1	1
Stroud	5	3	5	1	1	5	5	1	3	5	5	5	5	3	3	3
Stroud																
Stroud	5	4	5	2	3	5	5	5	4	4	1	1	3	2	3	4
Stroud	1	1	1	1	2	2	2	3	4	2	1	1	1	1	1	1
Stroud	5		4		5	3	3	5			4	3	2	2	2	1
Stroud																
Stroud	5	1	5	3	1	5	3	5	3	5	3	5	5	3	3	5
Stroud	3	3	3	2	4	3	3	3	1	1	1	1	1	1	1	1
Stroud																
Stroud	5	1	1	1	3	5	2	3	2	5	5	5	3	5	3	1
Stroud	5	4	5	2	5	3	3	5	5	5	2	5	5	3	2	1
Stroud										5		5	5	5	5	
Stroud					4											
Stroud	5	1	3	3	3	4	3	5	2	5	5	4	4	4	4	5
Stroud	5	1	5	1	1	1	3	1	1	3	5	3	2	5	5	5
Stroud	2	1	4	1	1	5	5	5	1	1	5	5	5	5	5	1
Stroud	5	5	5	4	5	4	5	5	5	5	5	4	3	5	5	5
Stroud	3	4	5	3	1	1	1	5	1	4	3	4	4	5	5	3
Thrupp	5	1	5	1	3	3	3	5	4	3	1	4	4	2	2	4
Thrupp	5	2	5	2	2	5	5	4	3	3	3	3	4	3	2	4
Thrupp	5	1	5	3	4	3	3	3	3	3	4	5	5	5	5	5
Thrupp	5	2	5	2	3	5	5	5	3	4	3	3	3	4	5	2
Thrupp	5	1	5	1	2	3	3	3	3	3	4	5	4	4	4	3
Woodchester																
Woodchester	5	5	5	2	2		5		5	3	5	4	4	5	5	5
Woodchester	3	1	3	1	1	1	1	4	1	4	4	4	4	4	3	3
Wotton	5	1	5	1	4	4	4	5	3	5		4	4	2	2	4
Wotton			5							5						
Wotton	5	4	5	1	1	4	5	5	2	4	2	3	3	4	4	1

Appendix 11a - Company Survey Responses Assessment, Part 1																
Question 11b - Please rate 1-5 how well your site performs against the following:										Not important = 1		Very important = 5				
Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Berkeley																
Berkeley	5											1				
Berkeley	5	1	4	1	1	1	1	5	1	1	1	5	1	1	1	5
Bisley	3	1	3	1	1	2	2	4	4	4	1	4	5			
Bisley	5	1	4	1	5	5	3	5	4	5	3	5	5	1	1	1
Brimscombe	4	4	4	N/A	N/A	3	3	4	3	3	3	4	4	2	2	3
Brimscombe	2	1	4	3	3	3	3	5	3	3	3	3	3	3	3	3
Brimscombe	2	1	3	1	1	3	3	4	3	4	4	4	2	3	3	3
Cam/Dursley																
Cam/Dursley	5	4	4	3	3	4	3	5	4	4	5	5	5	3	3	3
Cam/Dursley																
Cam/Dursley	3	1	2	1	1	3	2	5	1	3	1	2	3	1	1	2
Cam/Dursley						1										
Cam/Dursley	3	1	4	1	1	2	2	4	2	3	3	4	4	1	1	3
Cam/Dursley	3	3	2	2	1	4	4	4	2	4	3	3	3	1	1	3
Cam/Dursley	4	3	3	3	3	2	2	4	3	3	3	4	4	1	1	1
Cam/Dursley	4	1	1	3	1	1	2	4	1	4	1	4	3	1	1	3
Cambridge	1	1	1	3	3	4	4	5	3	2	2	4	1	3	2	2
Chalford	5	3	5	2	5	N/A	N/A	N/A	N/A	5	N/A	5	5	N/A	N/A	1
Chalford	5	2	5	4	4	4	4	4	5	5	2	5	5	2	2	5
Chalford	3	2	3	1	1	4	1	4	1	3	5	4	3	3	2	3
Chalford	4	2	2	3	4	3	3	4	3	4	3	2	2	1	1	3
Horsley	5	1	3	3	1	1	1	5	3	5	3	5	5	2	1	2
Miserden																
Nailsworth	3	2	3	1	1	4	5	5	4	5	3	3	5	4	4	3
Nailsworth	1	2	4	3	3	2	2	5	3	3	3	3	2	2	2	4
Painswick	5	4	5	3	4	5	5	5	5	5	4	4	4	3	2	1

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Quedgeley																
Quedgeley																
Quedgeley	5	1	4	2	1	2	2	5	4	3	5	4	4	5	4	3
Quedgeley	5	3	4	2	2	4	3	4	4	5	3	5	5			3
Quedgeley	5	5	4	4	3	3	3	5	5	5	4	5	5	4	4	3
Quedgeley	5	3	4	2	1	1	1	5	3	4	2	5	5	1	1	2
Quedgeley	5	2	3	1	5	3	3	5	2	5	5	5	5	1	1	3
Quedgeley	4	1	3	2	1	3	3	3	2	3	2	3	4	4	2	4
Saul	3	1	2	3	1	3	2	2	1	3	3	5	4	3	3	1
Sharpness	5	1	2	1	1	4	4	4	3	3	2	3	5	2	2	2
Sharpness	5	5	5	5	3	3	3	5	5	5	5	5	5	3	3	3
Stonehouse	4	1	5	3	4	2	3	4	5	3	3	4	4	3	3	3
Stonehouse	5	3	3	2	2	4	4	4	5	4	5	5	5	3	3	5
Stonehouse																
Stonehouse	4	1	3	2	1	3	2	4	3	5	3	3	5	3	3	5
Stonehouse																
Stonehouse	5	5	4	5	5	3	3	5	3	5	2	3	3	2	2	4
Stonehouse	5	3	1	3	3	2	2	5	3	4	2	3	4	2	2	4
Stonehouse																
Stonehouse																
Stonehouse	5	2	3	3	4	3	3	3	2	4	3	4	5	5	5	2
Stonehouse																
Stonehouse	3	2	4	2	4	2	1	4	3	2	2	3	5	3	2	4
Stonehouse	5	1	4	2	5	3	3	4	2	2	2	2	2	2	2	1
Stonehouse	5	1	1	1	4	1	1	4	1	2	1	4	2	1	1	4
Stonehouse	5	3	5	3	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	5	3	5	3	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	5	4	4	4	5	3	2	4	4	5	4	4	4	3	2	5
Stonehouse	5	5	3	3	4	4	3	5	4	5	3	4	4	4	2	1
Stonehouse	5	4	3	1	1	3	1	5	3	4	3	1	1	2	2	1
Stonehouse	5	3	3	3	3	3	3	5	5	4	1	1	3	1	1	5
Stonehouse	5	1	3	3	1	2	2	5	3	3	3	5	4	1	1	5
Stonehouse	5	4	4	2	4	3	2	3	2	4	3	2	4	2	2	1

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Stroud	3	3	1	3	3	3	3	5	3	2	3	4	2	2	1	3
Stroud																
Stroud																
Stroud	5	5	5			5	5	5	5	5	5	5	5			
Stroud	5			4	4	4	4	5	4	4	N/A	5	5			5
Stroud																
Stroud	5	1	1	3	3	1	1	1	1	3	1	5	5	1	1	5
Stroud	2	3	4	1	5	4	4	5	4	5	3	4	4	2	3	4
Stroud	5	1	5	1	1	1	1	5	1	1	1	5	5	1	1	1
Stroud	5			1	1		1					3	3			
Stroud																
Stroud	5	4	5	2	2	4	4	3	3	4	2	2	2	2	2	2
Stroud	4	2	2	1	2	2	2	3	4	2	3	3	3	3	3	2
Stroud	5	1	5		5	3	3	5	2	2	3	3	2	2	2	1
Stroud																
Stroud	5	5	5	3	N/A	5	3	5	3	5	3	5	5	3	3	5
Stroud	3	3	3	2	4	3	3	3	1	1	1	1	1	1	1	1
Stroud																
Stroud	1	3	2	3	5	3	3	3	3	5	5	5	5	5	3	3
Stroud	3	4	5	2	5	2	2	5	2	2	2	5	5	3	2	1
Stroud														1		
Stroud																
Stroud	4	2	2	2	3	3	2	4	2	1	1	1	1	1	1	4
Stroud	2	1	4	1	1	1	4	1	4	3	3	5	1	5	5	5
Stroud	1	3	4	1	1	5	5	5	1	1	5	5	1	1	1	1
Stroud	5	5	5	3	3	5	5	5	5	4	5	3	4	5	5	5
Stroud	3	5	3	3	1	1	1	4	1	3	3	3	2	1	3	4
Thrupp	5	5	4	3	3	3	2	5	2	5	4	4	4	2	2	4
Thrupp	4	1	4	2	2	3	3	4	2	4	4	4	4	2	2	3
Thrupp	5	4	4	3	4	3	3	3	3	3	4	5	5	5	5	1
Thrupp	4	3	3	2	4	2	2	4	3	4	4	4	3	2	2	3
Thrupp	5															
Woodchester																
Woodchester	1	1	1	1	1	1	2		1	1	2			2	1	1
Woodchester	3	2	3	1	3	2	2	4	1	3	3	4	3	2	2	2
Wotton	4	1	5	1	3	3	2	5	3	5		3	4	2	2	4
Wotton	5	4	4	4		2	2	3		3		3	5	5	5	
Wotton	5	1	2	1	1	2	3	4	2	5	2	3	3	2	2	3

Appendix 11a - Company Survey Responses Assessment, Part 1										
Business Support - Would you like to receive further information on government backed programmes related to:										
Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Berkeley										
Berkeley										
Berkeley										
Bisley										
Bisley										
Brimscombe										
Brimscombe										
Brimscombe		1		1	1	1	1	1		
Cam/Dursley										
Cam/Dursley	1			1				1		
Cam/Dursley										
Cam/Dursley	1			1		1				
Cam/Dursley										
Cam/Dursley	1			1		1				
Cam/Dursley	1	1				1				
Cam/Dursley	1	1	1	1	1	1	1	1		
Cam/Dursley		1			1	1	1	1		
Cambridge								1		
Chalford										
Chalford	1	1	1					1		
Chalford		1		1	1					
Chalford										
Chalford				1						
Horsley					1		1	1		
Miserden										
Nailsworth										
Nailsworth										
Painswick										

Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Painswick										
Quedgeley										
Quedgeley										
Quedgeley										
Quedgeley	1	1		1	1	1	1	1		
Quedgeley						1		1		
Quedgeley										
Quedgeley										
Quedgeley	1	1		1	1					
Saul	1	1				1	1	1		
Sharpness	1					1				
Sharpness			1	1						
Stonehouse										
Stonehouse								1		
Stonehouse										
Stonehouse										
Stonehouse	1			1		1				
Stonehouse										
Stonehouse	1	1	1	1		1		1		
Stonehouse	1	1	1	1		1				
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse	1									
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse	1							1		
Stonehouse	1						1			
Stonehouse										
Stonehouse	1	1			1		1			
Stonehouse										
Stroud										

Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Stroud										
Stroud										
Stroud										
Stroud										
Stroud	1			1						
Stroud										
Stroud										
Stroud										
Stroud	1									
Stroud			1							
Stroud	1							1		
Stroud										
Stroud			1							
Stroud										
Stroud	1	1	1	1		1		1		
Stroud							1			
Stroud				1				1		
Stroud										
Stroud	1									
Stroud	1			1						
Stroud										
Stroud					1		1	1		
Stroud										
Thrupp										
Thrupp	1									
Thrupp								1		
Thrupp	1				1					
Thrupp										
Woodchester										
Woodchester										
Woodchester										
Wotton										
Wotton										
Wotton										
Totals	25	13	8	18	10	14	11	19	0	0

Appendix 11b - Company Survey Responses Assessment, Part 2																
11a Please rate 1-5 how important the following are for your business:																
Not important = 1 Very important = 5																
Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Berkeley																
Berkeley	5	1	1			3	3									
Berkeley	5	1	5	1	1	5	5	5	1	1	1	5	2	5	5	5
Bisley	4	4	5	1	1	3	3	5	3	5	1	4	5	3	3	3
Bisley	5	3	5	1	5	5	3	5	4	5	3	5	5	1	1	3
Brimscombe	5	5	5	1	1	3	3	4	3	3	3	5	5	3	3	5
Brimscombe	5	1	5	1	1	4	4	5	3	3	3	5	3	1	1	3
Brimscombe	5	1	5	1	1	3	3	4	3	3	3	3	3	3	3	3
Cam/Dursley																
Cam/Dursley	5	4	5	3	3	5	5	5	4	4	5	5	5	5	3	5
Cam/Dursley																
Cam/Dursley	5	2	5	1	1	3	3	3	4	3	1	1	1	1	1	1
Cam/Dursley																
Cam/Dursley	4	1	5	1	1	4	4	4	3	3	3	4	4	1	1	3
Cam/Dursley	5	3	5	3	1	5	5	5	3	3	4	3	3	5	5	1
Cam/Dursley	5	3	5	1	3	5	5	5	5	5	5	5	5	5	5	5
Cam/Dursley	5	1	5	4	3	1	1	4	1	4	1	5	5	1	1	4
Cambridge	2	1	5	1	3	5	4	4	4	5	3	4	4	5	5	5
Chalford	5	3	5	1	5	1	1	N/A	1	5	N/A	5	5	N/A	N/A	1
Chalford	5	1	5	3	4	4	4	4	3	4	4	5	5	2	2	3
Chalford	5	5	5	1	1	4	1	5	1	3	5	4	3	3	4	3
Chalford	5	1	5	1	4	4	2	5	1	3	5	5	5	3	4	2
Horsley	1	3	5	3	1	1	1	5	1	5	1	1	5	1	1	3
Miserden																
Nailsworth	5	3	5	1	1	4	5	5	5	3	3	4	4	4	4	3
Nailsworth	5	4	5	1	1	5	5	4	4	4	5	3	2	5	5	4
Nailsworth	5	1	5	1	3	5	3	3	2	5	4	4	4	4	5	4
Painswick	5	3	5	2	4	5	5	5	3	5	3	5	5	2	2	3
Quedgeley																
Quedgeley																
Quedgeley	5	1	5	2	1	4	3	5	4	3	5	4	4	5	4	3
Quedgeley	5	2	5	1	1	5	5	5	4	5	5	5	5	5	5	3
Quedgeley	5	5	5	3	3	5	5	5	5	5	5	5	5	5	5	5
Quedgeley	5	1	5	2	1	3	3	5	3	4	1	5	5	1	1	1
Quedgeley	5	2	5	1	5	5	5	5	5	5	5	5	5	1	1	3
Quedgeley	4	2	5	2	1	4	4	5	2	3	4	4	4	5	5	2
Saul	5	1	5	3	1	5	2	5	1	5	3	5	4	5	5	5
Sharpness	5	2	5	1	1	5	4	4	3	5	5	5	5	5	5	2
Sharpness	5	5	5	5	5	5	5	5	5	5	5	5	5	5	3	3

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance	
Stonehouse	5	1	5	3	4	4	3	5	3	4	1	5	5	5	2	2	1
Stonehouse	5	1	1	1	1	3	1	2	3	4	5	5	5	1	1	5	
Stonehouse																	
Stonehouse																	
Stonehouse	5	3	3	3	1	5	5	4	4	3	1	3	3	1	1	1	
Stonehouse																	
Stonehouse	5	5	5	5	5	5	5	5	5	5	5	5	3	2	2	4	
Stonehouse	5	4	5	3	2	5	4	4	5	4	5	4	4	5	5	5	
Stonehouse																	
Stonehouse																	
Stonehouse	5	3	4	3	4	3	3	3	2	5	3	2	5	1	1	2	
Stonehouse																	
Stonehouse	5	5	4	4	5	5	5	5	3	5	5	5	5	4	4	5	
Stonehouse	5	1	4	2	5	3	3	4	2	2	2	2	2	2	2	1	
Stonehouse	5	1	1	1	4	1	1	4	1	2	1	4	2	5	5	5	
Stonehouse	5	3	5	4	3	4	4	5	3	3	3	3	3	3	3	4	
Stonehouse	5	3	5	4	3	4	4	5	3	3	3	3	3	3	3	4	
Stonehouse	4	1	5	3	2	4	4	4	2	4	5	4	5	4	4	2	
Stonehouse	4	4	4	1	3	5	4	5	4	5	4	4	4	3	3	5	
Stonehouse	5	4	5	1	1	4	5	5	5	3	1	2	1	1	2	1	
Stonehouse	5	3	3	2	3	3	3	5	5	4	5	2	3	1	1	5	
Stonehouse	5	1	5	3	1	5	4	4	1	3	5	5	5	5	5	3	
Stonehouse	5	2	4	1	4	2	2	2	2	2	2	2	3	4	4	1	
Stroud	4	2	1	3	3	1	1	1	1	1	3	5		2	5	2	
Stroud																	
Stroud																	
Stroud	5	5	5	1	1	4	5	5	4	5	5	5	5	1	1	1	
Stroud	5	2	5	2	2	4	4	4	2	5	1	2	2	2	2	2	
Stroud																	
Stroud			5														
Stroud	1	1	1	3	3	1	1	1	1	3	1	5	5	1	1	5	
Stroud	5	3	5	1	5	4	4	5	4	5	5	5	5	2	4	5	
Stroud	5	1	5	1	1	1	1	5	1	1	1	5	5	1	1	1	
Stroud	5	3	5	1	1	5	5	1	3	5	5	5	5	3	3	3	
Stroud																	
Stroud	5	4	5	2	3	5	5	5	4	4	1	1	3	2	3	4	
Stroud	1	1	1	1	2	2	2	3	4	2	1	1	1	1	1	1	
Stroud	5		4		5	3	3	5			4	3	2	2	2	1	
Stroud																	
Stroud	5	1	5	3	1	5	3	5	3	5	3	5	5	3	3	5	
Stroud	3	3	3	2	4	3	3	3	1	1	1	1	1	1	1	1	
Stroud																	
Stroud	5	1	1	1	3	5	2	3	2	5	5	5	3	5	3	1	
Stroud	5	4	5	2	5	3	3	5	5	5	2	5	5	3	2	1	

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Stroud										5		5	5	5	5	5
Stroud					4											
Stroud	5	1	3	3	3	4	3	5	2	5	5	4	4	4	4	5
Stroud	5	1	5	1	1	1	3	1	1	3	5	3	2	5	5	5
Stroud	2	1	4	1	1	5	5	5	5	1	1	5	5	5	5	1
Stroud	5	5	5	4	5	4	5	5	5	5	5	5	4	3	5	5
Stroud	3	4	5	3	1	1	1	5	1	4	3	4	4	5	5	3
Thrupp	5	1	5	1	3	3	3	5	4	3	1	4	4	2	2	4
Thrupp	5	2	5	2	2	5	5	5	4	3	3	3	4	3	2	4
Thrupp	5	1	5	3	4	3	3	3	3	3	4	5	5	5	5	5
Thrupp	5	2	5	2	3	5	5	5	3	4	3	3	4	5	2	2
Thrupp	5	1	5	1	2	3	3	3	3	3	4	5	4	4	4	3
Woodchester																
Woodchester	5	5	5	2	2		5		5	3	5	4	4	5	5	5
Woodchester	3	1	3	1	1	1	1	4	1	4	4	4	4	4	3	3
Wotton	5	1	5	1	4	4	4	5	3	5		4	4	2	2	4
Wotton			5							5						
Wotton	5	4	5	1	1	4	5	5	2	4	2	3	3	4	4	1
Total Score	355	182	350	147	195	282	267	315	219	292	247	306	296	231	234	236
No. of Responses	77	76	79	75	77	76	77	74	75	77	74	77	76	75	75	76
Average	4.61	2.39	4.43	1.96	2.53	3.71	3.47	4.26	2.92	3.79	3.34	3.97	3.89	3.08	3.12	3.11
11a Please rate 1-5 how important the following are for your business:										Not important = 1		Very important = 5				
Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/ Training	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average
Berkeley	5.00	1.00	3.00	1.00	1.00	4.00	4.00	5.00	1.00	1.00	1.00	5.00	2.00	5.00	5.00	5.00
Bisley	4.50	2.33	5.00	1.00	3.00	4.00	3.00	5.00	3.50	5.00	2.00	4.50	5.00	2.00	2.00	3.00
Brimscombe	5.00	2.33	5.00	1.00	1.00	3.33	3.33	4.33	3.00	3.00	3.00	4.33	3.67	2.33	2.33	3.67
Cam/Dursley	4.83	2.33	5.00	2.17	2.00	3.83	3.83	4.33	3.33	3.67	3.71	3.83	3.83	3.00	2.67	3.17
Cambridge	2.00	3.00	5.00	1.00	3.00	5.00	4.00	4.00	4.00	5.00	3.00	4.00	4.00	5.00	5.00	5.00
Chalford	5.00	2.50	5.00	3.00	3.50	3.25	2.00	3.50	1.50	0.75	3.50	3.50	4.50	2.00	2.50	2.25
Horsley	1.00	3.00	5.00	3.00	1.00	1.00	1.00	5.00	1.00	5.00	1.00	1.00	5.00	1.00	1.00	3.00
Miserden	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nailsworth	5.00	2.67	5.00	1.00	1.67	4.67	4.33	4.00	3.67	4.00	4.00	3.67	3.33	4.33	4.67	3.67
Painswick	5.00	4.00	5.00	2.00	4.00	5.00	5.00	5.00	3.00	5.00	3.00	5.00	5.00	2.00	2.00	3.00
Quedgeley	4.83	2.17	5.00	1.57	2.00	4.33	4.17	5.00	3.83	4.17	4.17	4.67	4.67	3.40	3.20	2.83
Saul	5.00	1.00	5.00	3.00	1.00	5.00	2.00	5.00	1.00	5.00	3.00	5.00	4.00	5.00	5.00	5.00
Sharpness	5.00	3.50	5.00	3.00	3.00	5.00	4.50	4.50	4.00	5.00	5.00	5.00	5.00	4.00	4.00	2.50
Stonehouse	4.88	3.00	4.00	2.59	3.00	3.82	3.53	4.18	3.12	3.59	3.29	3.53	3.59	2.76	2.82	3.18
Stroud	4.16	2.39	3.90	1.94	2.70	3.21	3.11	3.79	2.50	3.68	3.21	3.90	3.68	2.90	3.05	2.74
Thrupp	5.00	1.40	5.00	1.80	2.80	3.80	3.80	4.00	3.20	3.20	3.00	4.00	4.00	3.60	3.60	3.60
Woodchester	4.00	3.00	4.00	1.50	1.50	1.00	3.00	4.00	3.00	3.50	4.50	4.00	4.00	4.50	4.00	5.00
Wotton	5.00	2.50	5.00	1.00	2.50	4.00	4.50	5.00	2.50	4.67	2.00	3.50	3.50	3.00	3.00	2.50

Appendix 11b - Company Survey Responses Assessment, Part 2																
11b Please rate 1-5 how well your site performs against the following:										Not important = 1		Very important = 5				
Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/T raining	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Berkeley																
Berkeley	5											1				
Berkeley	5	1	4	1	1	1	1	5	1	1	1	5	1	1	1	5
Bisley	3	1	3	1	1	2	2	4	4	4	1	4	5			
Bisley	5	1	4	1	5	5	3	5	4	5	3	5	5	1	1	1
Brimscombe	4	4	4	N/A	N/A	3	3	4	4	3	3	4	4	2	2	3
Brimscombe	2	1	4	3	3	3	3	5	3	3	3	3	3	3	3	3
Brimscombe	2	1	3	1	1	3	3	4	3	4	4	4	2	3	3	3
Cam/Dursley																
Cam/Dursley	5	4	4	3	3	4	3	5	4	4	5	5	5	3	3	3
Cam/Dursley																
Cam/Dursley	3	1	2	1	1	3	2	5	1	3	1	2	3	1	1	2
Cam/Dursley																
Cam/Dursley					1											
Cam/Dursley	3	1	4	1	1	2	2	4	2	3	3	4	4	1	1	3
Cam/Dursley	3	3	2	2	1	4	4	4	2	4	3	3	3	1	1	3
Cam/Dursley	4	3	3	3	3	2	2	4	3	3	3	4	4	1	1	1
Cam/Dursley	4	1	1	3	1	1	2	4	1	4	1	4	3	1	1	3
Cambridge	1	1	1	3	3	4	4	5	3	2	2	4	1	3	2	2
Chalford	5	3	5	2	5	N/A	N/A	N/A	N/A	5	N/A	5	5	N/A	N/A	1
Chalford	5	2	5	4	4	4	4	4	5	5	2	5	5	2	2	5
Chalford	3	2	3	1	1	4	1	4	1	3	5	4	3	3	2	3
Chalford	4	2	2	3	4	3	3	4	3	4	3	2	2	1	1	3
Horsley	5	1	3	3	1	1	1	5	3	5	3	5	5	2	1	2
Miserden																
Nailsworth	3	2	3	1	1	4	5	5	4	5	3	3	5	4	4	3
Nailsworth	1	2	4	3	3	2	2	5	3	3	3	3	2	2	2	4
Nailsworth	5	3	4	4	5	5	3	3	2	5	3	4	4	4	3	4
Painswick	5	4	5	3	4	5	5	5	5	5	4	4	4	3	2	1
Quedgeley																
Quedgeley																
Quedgeley	5	1	4	2	1	2	2	5	4	3	5	4	4	5	4	3
Quedgeley	5	3	4	2	2	4	3	4	4	5	3	5	5			3
Quedgeley	5	5	4	4	3	3	3	5	5	5	4	5	5	4	4	3
Quedgeley	5	3	4	2	1	1	1	5	3	4	2	5	5	1	1	2
Quedgeley	5	2	3	1	5	3	3	5	2	5	5	5	5	1	1	3
Quedgeley	4	1	3	2	1	3	3	3	2	3	2	3	4	4	2	4
Saul	3	1	2	3	1	3	2	2	1	3	3	5	4	3	3	1
Sharpness	5	1	2	1	1	4	4	4	3	3	2	3	5	2	2	2
Sharpness	5	5	5	5	3	3	3	5	5	5	5	5	5	3	3	3

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/T raining	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Stonehouse	4	1	5	3	4	2	3	4	5	3	3	4	4	3	3	3
Stonehouse	5	3	3	2	2	4	4	4	5	4	5	5	5	3	3	5
Stonehouse																
Stonehouse	4	1	3	2	1	3	2	4	3	5	3	3	5	3	3	5
Stonehouse																
Stonehouse	5	5	4	5	5	3	3	5	3	5	2	3	3	2	2	4
Stonehouse	5	3	1	3	3	2	2	5	3	4	2	3	4	2	2	4
Stonehouse																
Stonehouse	5	2	3	3	4	3	3	3	2	4	3	4	5	5	5	2
Stonehouse																
Stonehouse	3	2	4	2	4	2	1	4	3	2	2	3	5	3	2	4
Stonehouse	5	1	4	2	5	3	3	4	2	2	2	2	2	2	2	1
Stonehouse	5	1	1	1	4	1	1	4	1	2	1	4	2	1	1	4
Stonehouse	5	3	5	3	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	5	3	5	3	3	4	4	5	3	3	3	3	3	3	3	4
Stonehouse	5	4	4	4	5	3	2	4	4	5	4	4	4	3	2	5
Stonehouse	5	5	3	3	4	4	3	5	4	5	3	4	4	4	2	1
Stonehouse	5	4	3	1	1	3	1	5	3	4	3	1	1	2	2	1
Stonehouse	5	3	3	3	3	3	3	5	5	4	1	1	3	1	1	5
Stonehouse	5	1	3	3	1	2	2	5	3	3	3	5	4	1	1	5
Stonehouse	5	4	4	2	4	3	2	3	2	4	3	2	4	2	2	1
Stroud	3	3	1	3	3	3	3	5	3	2	3	4	2	2	1	3
Stroud																
Stroud																
Stroud	5	5	5			5	5	5	5	5	5	5	5			
Stroud	5															
Stroud	5			4	4	4	4	5	4	4	N/A	5	5			5
Stroud																
Stroud	5	1	1	3	3	1	1	1	1	3	1	5	5	1	1	5
Stroud	2	3	4	1	5	4	4	5	4	5	3	4	4	2	3	4
Stroud	5	1	5	1	1	1	1	5	1	1	1	5	5	1	1	1
Stroud	5			1	1		1					3	3			
Stroud																
Stroud	5	4	5	2	2	4	4	3	3	4	2	2	2	2	2	2
Stroud	4	2	2	1	2	2	2	3	4	2	3	3	3	3	3	2
Stroud	5	1	5		5	3	3	5	2	2	3	3	2	2	2	1
Stroud																
Stroud	5	5	5	3	N/A	5	3	5	3	5	3	5	5	3	3	5
Stroud	3	3	3	2	4	3	3	3	1	1	1	1	1	1	1	1
Stroud																
Stroud	1	3	2	3	5	3	3	3	3	5	5	5	5	5	3	3
Stroud	3	4	5	2	5	2	2	5	2	2	2	5	5	3	2	1

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/T raining	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
Stroud															1	
Stroud	4	2	2	2	3	3	2	4	2	1	1	1	1	1	1	4
Stroud	2	1	4	1	1	1	4	1	4	3	3	5	1	5	5	5
Stroud	1	3	4	1	1	5	5	5	1	1	5	5	1	1	1	1
Stroud	5	5	5	3	3	5	5	5	5	4	5	3	4	5	5	5
Stroud	3	5	3	3	1	1	1	4	1	3	3	3	2	1	3	4
Thrupp	5	5	4	3	3	3	2	5	2	5	4	4	4	2	2	4
Thrupp	4	1	4	2	2	3	3	4	2	4	4	4	4	2	2	3
Thrupp	5	4	4	3	4	3	3	3	3	3	4	5	5	5	5	1
Thrupp	4	3	3	2	4	2	2	4	3	4	4	4	3	2	2	3
Thrupp	5															
Woodchester																
Woodchester	1	1	1	1	1		2		1	1	2			2	1	1
Woodchester	3	2	3	1	3	2	2	4	1	3	3	4	3	2	2	2
Wotton	4	1	5	1	3	3	2	5	3	5		3	4	2	2	4
Wotton	5	4	4	4		2	2	3		3		3	5	5	5	5
Wotton	5	1	2	1	1	2	3	4	2	5	2	3	3	2	2	3
Total Score	325	185	253	168	197	215	202	309	209	267	208	283	273	171	156	213
No. of Responses	79	74	74	73	73	73	75	73	73	75	71	76	75	71	70	72
Average	4.11	2.50	3.42	2.30	2.70	2.95	2.69	4.23	2.86	3.56	2.93	3.72	3.64	2.41	2.23	2.96

11b Please rate 1-5 how well your site performs against the following:

Area	Road Access	Public Transport	IT/Telecons	Located near Suppliers	Located close to Customers	Labour pool	Local skills	Low staff turnover	Local Education/T raining	Quality of Life and Environ	Land Prices	Premises Good Value	Premises Good Quality	Available Quality Alternative	Available Affordable Alternative	Access to Finance
	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average
Berkeley	5.00	1.00	4.00	1.00	1.00	1.00	1.00	5.00	1.00	1.00	1.00	3.00	1.00	1.00	1.00	5.00
Bisley	4.00	1.00	3.50	1.00	3.00	3.50	2.50	4.50	4.00	4.50	2.00	2.00	5.00	1.00	1.00	1.00
Brimscombe	2.67	2.00	3.67	2.00	2.00	3.00	3.00	4.33	3.00	3.33	3.33	3.33	3.00	3.67	2.67	3.00
Cam/Dursley	3.67	2.17	2.67	2.17	1.57	2.67	2.83	4.33	2.17	3.50	2.67	2.67	3.67	2.33	2.67	2.75
Cambridge	1.00	1.00	1.00	3.00	3.00	4.00	4.00	5.00	3.00	2.00	2.00	2.00	1.00	3.00	2.00	2.00
Chalford	4.50	2.25	3.75	2.50	3.50	3.67	2.67	4.00	3.00	4.25	3.33	4.00	3.75	2.00	1.67	3.00
Horsley	5.00	1.09	3.00	3.00	1.00	1.00	1.00	5.00	3.00	5.00	3.00	5.00	5.00	2.00	1.00	2.00
Miserden	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nailsworth	3.00	2.67	4.33	2.67	3.00	3.67	3.33	4.33	3.00	4.33	3.00	3.33	3.67	3.33	3.00	3.67
Painswick	5.00	4.00	5.00	3.00	4.00	5.00	5.00	5.00	5.00	5.00	4.00	4.00	4.00	3.00	2.00	1.00
Quedgeley	4.83	2.50	3.67	2.17	2.17	2.67	2.50	4.50	3.67	4.17	3.50	4.50	4.67	3.00	2.40	3.00
Saul	3.00	1.00	2.00	3.00	1.00	3.00	2.00	2.00	1.00	3.00	3.00	5.00	4.00	3.00	3.00	1.00
Sharpness	5.00	3.00	3.50	3.00	2.00	3.50	3.50	4.50	4.00	4.00	3.50	4.00	5.00	2.50	2.50	2.50
Stonehouse	4.76	2.71	3.41	2.65	3.29	2.88	2.53	4.35	3.18	3.65	2.71	3.18	3.59	2.53	2.29	3.41
Stroud	3.08	3.00	3.59	2.12	2.72	3.06	2.95	4.00	2.72	2.94	2.72	3.79	3.21	2.29	2.31	3.06
Thrupp	4.06	3.25	3.50	2.50	3.25	2.75	2.50	4.00	2.50	4.00	4.00	4.25	4.00	2.75	2.75	2.75
Woodchester	2.00	1.50	2.00	1.00	2.00	2.00	2.00	4.00	1.00	2.00	2.50	4.00	3.00	2.00	1.50	1.50
Wotton	4.67	2.00	3.67	2.00	2.00	2.67	2.67	4.00	2.50	4.33	2.00	3.00	4.00	3.00	3.00	3.50
Average	4.11	2.50	3.42	2.30	2.70	2.95	2.69	4.23	2.86	3.56	2.93	3.72	3.64	2.41	2.23	2.96

Appendix 11b - Company Survey Responses Assessment, Part 2										
Business Support - Would you like to receive further information on government backed programmes related to:										
Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Berkeley										
Berkeley										
Berkeley										
Bisley										
Bisley										
Brimscombe										
Brimscombe										
Brimscombe		1		1	1	1	1	1		
Cam/Dursley										
Cam/Dursley	1			1				1		
Cam/Dursley										
Cam/Dursley	1			1		1				
Cam/Dursley										
Cam/Dursley										
Cam/Dursley	1			1		1				
Cam/Dursley	1	1				1				
Cam/Dursley	1	1	1	1	1	1	1	1		
Cam/Dursley		1			1	1	1	1		
Cambridge								1		
Chalford										
Chalford	1	1	1					1		
Chalford		1		1	1					
Chalford										
Chalford				1						
Horsley					1		1	1		
Miserden										
Nailsworth										
Nailsworth										
Nailsworth					1					
Painswick										
Quedgeley										
Quedgeley										
Quedgeley										
Quedgeley	1	1		1	1	1	1	1		

Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Quedgeley						1		1		
Quedgeley										
Quedgeley										
Quedgeley	1	1		1	1					
Saul	1	1				1	1	1		
Sharpness	1					1				
Sharpness			1	1						
Stonehouse										
Stonehouse								1		
Stonehouse										
Stonehouse										
Stonehouse	1			1		1				
Stonehouse										
Stonehouse	1	1	1	1		1		1		
Stonehouse	1	1	1	1		1				
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse										
Stonehouse	1			1				1		
Stonehouse										
Stonehouse							1			
Stonehouse										
Stonehouse										
Stonehouse	1							1		
Stonehouse	1						1			
Stonehouse										
Stonehouse	1	1			1		1			
Stonehouse										
Stroud										
Stroud										
Stroud										
Stroud										
Stroud	1			1						
Stroud										

Area	Manufacturing	Innovation	Exporting	Apprenticeships	Business Coaching	Research and Development	Business Mentoring	Access to Finance	Other	No Response
Stroud										
Stroud										
Stroud										
Stroud	1									
Stroud			1							
Stroud	1							1		
Stroud										
Stroud										
Stroud			1							
Stroud										
Stroud	1	1	1	1		1		1		
Stroud							1			
Stroud				1				1		
Stroud										
Stroud										
Stroud	1									
Stroud	1			1						
Stroud										
Stroud					1		1	1		
Stroud										
Thrupp										
Thrupp	1									
Thrupp								1		
Thrupp	1				1					
Thrupp										
Woodchester										
Woodchester										
Woodchester										
Wotton										
Wotton										
Wotton										
TOTALS	25	13	8	18	11	14	11	19	0	0



STROUD DISTRICT COUNCIL

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To all Parish and Town Councils

25 September 2012

Dear Parish / Town Clerk

STROUD DISTRICT ECONOMIC ASSESSMENT AND EMPLOYMENT LAND STUDY

Stroud District Council has commissioned AECOM and BE Group to undertake an economic assessment and employment land study for the district. This will include comprehensive study of the need and demand for office, manufacturing and warehouse space across the whole of the District.

As part of the study BE Group is consulting with key stakeholders and in this respect they are seeking the views of your Parish/town Council regarding supply and demand/need for employment sites and premises in your area. It may be, for example, that there are buildings or sites in your parish which you wish to see redeveloped. It may be that the Parish Council considers there is a need to provide more local employment opportunities. Other possible views could relate to:

- A need for more sites for employment development.
- A requirement for improved office/industrial premises supply
- A desire to attract employers to your area
- A wish to encourage more people to work locally
- The protection of the parish from unwanted development.

These are just examples. It is recognised that each Parish/town Council varies in size, population, employment activity, etc. and may therefore have differing views or issues. Stroud District Council would be grateful, therefore, if you could highlight this matter at your next Parish Council meeting. We would very much appreciate any comments you may have, which should be provided direct to the BE Group either by:

Email: petercrompton@begroup.uk.com

Writing to: BE Group, 1st Floor, 501 Birchwood One Business Park, Dewhurst Road, Birchwood, Warrington WA3 7GB

BE Group look forward to hearing from you and should you require any further clarification then please do not hesitate to contact Peter Crompton at BE Group, tel: 01925 822112.

Please can you respond by the 5th November 2012.

Yours sincerely

Peter Gilbert
Planning Strategy Manager



Chief Executive: David Hagg



APPENDIX 13 – DEFINITIONS USED

Advanced Manufacturing:

- 19 : Manufacture of coke and refined petroleum products
- 20 : Manufacture of chemicals and chemical products
- 21 : Manufacture of basic pharmaceutical products and pharmaceutical preparations
- 22 : Manufacture of rubber and plastic products
- 23 : Manufacture of other non-metallic mineral products
- 24 : Manufacture of basic metals
- 26 : Manufacture of computer, electronic and optical products
- 27 : Manufacture of electrical equipment
- 28 : Manufacture of machinery and equipment (not elsewhere counted)
- 29 : Manufacture of motor vehicles, trailers and semi-trailers
- 30 : Manufacture of other transport equipment

Environmental Technologies:

- 8130 : Landscape service activities
- 7219 : Other research and experimental development on natural sciences and engineering
- 2446 : Processing of nuclear fuel
- 2530 : Manufacture of steam generators, except central heating hot water boilers
- 3250 : Manufacture of medical and dental instruments and supplies
- 7120 : Technical testing and analysis
- 3511 : Production of electricity
- 0910 : Support activities for petroleum and natural gas extraction
- 3900 : Remediation activities and other waste management services
- 8412 : Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
- 8413 : Regulation of and contribution to more efficient operation of businesses
- 2059 : Manufacture of other chemical products(not elsewhere counted)
- 2829 : Manufacture of other general-purpose (not elsewhere counted)
- 4221 : Construction of utility projects for fluids
- 3821 : Treatment and disposal of non-hazardous waste
- 71112 : Urban planning and landscape architectural activities
- 71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
- 26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment

APPENDIX 14 – ECONOMIC FORECAST MODELS DETAILED CALCULATIONS

Policy Off

Model 2 – Employment Based Forecast 2012-2031

Sector/Jobs	Workforce Growth	Workforce Proportion (%) Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Required, sqm
Construction	1,300	26	338	12	4,056
Transportation & Storage	300	48	144	70	10,080
Information & Communications	100	100	100	12	1,200
Administrative & Support Services	1,400	100	1,400	12	16,800
Professional Services	1,700	100	1,700	12	20,400
Other Business Services	100	100	100	12	1,200
Total Floorspace sqm					53,736
Divided by Development Floorspace per ha					3,900
Equivalent Employment Land Needed ha					13.78

Sector/Jobs	Workforce Losses	Workforce Proportion (%) Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Reduction, sqm
Agriculture	200	5	10	12	120
Manufacturing	1,400	100	1,400	36-47	50,400-65,800
Public Administration	100	22	22	12	264
Total Floorspace sqm					50,784-66,184
Divided by Development Floorspace per ha					3,900
Equivalent Employment Land Reduction ha					13.02-16.97

Therefore employment land requirement:

- From growth 13.78 ha
- From losses -13.02 to -16.97 ha
- Total needed + 0.76 to -3.19 ha

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Model 3 – Population Based Forecast 2012-2031

Oxford Economics' Projections suggest a small increase in working population numbers of 1,000 by 2031. It takes no account of planned changes to retirement ages, and therefore presents a least case position. Application of the current economic activity rate of 80.7 percent (mid 2012 figure) indicates an increase of 8,807 residents working by 2031. The following calculation shows the percentage split of employment by all business sectors at 2031, applied to the 807 figure. Where relevant, job:floorspace density rates (Employment Densities Guide 2nd Edition 2010) and the proportion of people in each industry sector that occupy B Use Class space (The Use of Business Space, South East Region Planning Conference) have been applied.

Sector/Jobs	Sector Proportion of Total Workforce, percent	Workforce Increase	Workforce Proportion Occupying B1/2/8 space	Floorspace per job, sqm	Floorspace Increase, sqm
Agriculture	0.2	2	5	12	-
Manufacturing	16.8	136	100	36-47	4,896-6,392
Utilities	0.8	6	5	12	-
Construction	11.1	90	26	12	280
Wholesale & Retailing	13.7	110	-	-	-
Transportation & Storage	4.2	34	48	70	1,120
Hotels and Catering	7.2	58	-	-	-
Information & Communications	2.9	23	100	12	276
Finance & Insurance	0.6	5	100	12	60
Real Estate		9	100	12	108
Professional, Scientific & Technical Services	9.3	75	100	12	900
Administrative & Support Services	7.4	60	100	12	720
Public Administration	1.1	9	100	12	108
Education	6.5	52	22	12	132

Sector/Jobs	Sector Proportion of Total Workforce, percent	Workforce Increase	Workforce Proportion Occupying B1/2/8 space	Floorspace per job, sqm	Floorspace Increase, sqm
Health & Social Work	9.6	-	-	-	-
Arts, Entertainment & Research	3.1	-	-	-	-
Other Services	2.3	19	100	12	228
Total Floorspace sqm					8,828-10,324
Divided by Development Floorspace per ha					3,900
Equivalent Employment Land Needed ha					2.26-2.64

Therefore employment land provision required would be between 2.26 and 2.64 ha. This is substantially less than the current available supply.

