Dursley Neighbourhood Plan Economic Development Analysis

1. Employment

1.1 Dursley has experienced a 31% reduction in total employment over the last four years, which in real terms is over 860[1] jobs. This is significantly worse than Stroud or Gloucestershire and England as a whole, who are starting to recover from the effects of the recession. The sectors to experience the greatest losses are manufacturing, education and accommodation and food services. There has been a certain level of growth in health, wholesale and professional scientific and technical sectors, which has helped to counteract the losses in other sectors.
Graph 1,2 Table 1

1.2 The distribution of employment is similar to that of Stroud and wider Gloucestershire with manufacturing, health and retail being the largest employment sectors, this only differs from the English average slightly, where manufacturing does not present such a substantial sector of employment.
Graph 3, Table 2

2. Businesses

2.1 Proportionally Dursely has not seen such a steep decline in business stock as has been experienced in the level of employment, with a retraction of 5% of businesses between 2010 – 2015, this is just 10 businesses (net) in real terms. Most notably has been the reduction in retail, manufacturing and agricultural businesses. Growth in the business stock has been experienced in the last two years with construction and businesses administration expanding, but has slowed in 2015 falling behind both the local area and nationally. **Graph 4**

2.2 The distribution of businesses is closer to the English average than Stroud or Gloucestershire, where professional, scientific & technical; construction and agriculture are the top three sectors. Whereas in Dursley agriculture is replaced by retail and businesses administration as the third largest sector jointly. **Graph 5, Table 3**

2.3 Similarly to the local area and the rest of the country the majority of businesses in Dursley employ less than four people at 76.7%, however there is a larger proportion of businesses employing 5 to 9 and 10 to 19 people than its comparators, with no businesses in the local area employing over 20 people. There has been a retraction in all business types over the last five years except for those employing 10 -19 employees. (Please note there could be individual employers employing more than 20 people but due data suppression this has not been reported). **Table 4 & 5**

[1] NOMIS: BRES 2016

2.4 Dursley's workforce is predominantly in full time employment (over 30 hours per week), with the majority of sectors having a greater proportion of full time, workers than part time workers. There are some exceptions to this, which are characterised by part time employment including retail, health and accommodation services. **Table 6, Graph 6**

3. Economic Development Policy Review

3.1 There are three substantive policy areas within Gloucestershire which relate to the Dursely NDP.

3.2 Gfirst Local Enterprise Partnership - Strategic Economic Plan

Focused on four priority areas:

3.2.1 **Skills** - *a highly employable and economically productive population.*
3.2.2 **Connection** - *an infrastructure that supports economic growth.*
3.2.3 **Promotion** - *a quality of working life recognised as the best in the Europe.*
3.2.4 **Green (Nuclear)** - *future-proofing the skills infrastructure.* [2]

And three 'flagship' projects:

3.2.5 **Growth Zones** – ensuring the provision of strategic employment sites, with the necessary infrastructure and connectivity.
3.2.6 **Growth Hub** – Coordinated online business support services to support start up and expansion
3.2.7 **Green** – Focussing on the centre of excellence in nuclear technology industries and renewable technology at the decommissioned Berkeley power station site. [3]

3.3 Stroud District Council Jobs and Growth Plan 2015 – 2018

Action Plan seeks to:

3.3.1 support small businesses with loan fund and access to growth hub
3.3.2 Deliver £600,000 investment in jobs and growth in the Stroud Valleys on key regeneration sites and new development opportunities.
3.3.3 Invest in schemes brought forward by business partners for Micro/small business units and 'move on' premises.
3.3.4 Future role and function Town centres - Commission a study looking at the long term future of town centres in light of retailing trends and the changing nature of the 'high street'.[4]

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[2] Strategic Economic Plan for Growing Gloucestershire Gfirst LEP p.5
[3] Strategic Economic Plan for Growing Gloucestershire Gfirst LEP p.5, 16, 17
[4] Jobs & Growth Plan 2015 – 2018, Stroud District Council p. 4

3.4 Stroud District Local Plan November 2015

The Stroud District Local Plan provides the strategic and policy basis for planning in the area and is the primary tool in managing homes and jobs growth as well as shaping the places people live and shop in. The plan sets out a range of strategic intentions and policies and the most relevant to Dursley are as follows.

3.4.1 Core Policy CP3 – Settlement Hierarchy

Dursley is considered to be 'First Tier' settlement and will be one of the main focus for business and jobs growth in the district. Dursley and Cam is expected provide an increase of 640 sqm of retail space by 2031.[5]

3.4.2 Deliver Policy DPEI1 – Key employment sites

There are a range of economic development policies contained in the Stroud local plan, the most directly relevant is **DP EI1** – Key Employment sites. This states that …*'key employment sites listed (below) will be retained for B Class Uses. Redevelopment for alternative uses or changes of use from employment use will not be permitted on these sites.'* Site **EK6 Littlecombe** business park is identified as a key site, and is granted a great degree of protection from changes of use to non 'B' class uses (office, light Industrial, Industrial and warehouse and storage).'[6]

3.4.3 Core Policy CP12 Town centres and retailing

Dursley's function as a local centre and the importance of its retail offer is recognised with the following:

CP12. A. Town centre retail uses will be allocated through a hierarchy where Stroud is the 'primary' town centre and will be given priority and Dursley is considered to be a 'other' town centre and will be considered secondarily after Stroud.

CP12.C .Provides policy for the provision of local centres to be established that are not in easy walking distance of existing shops and services, but will need to be scalable and appropriate to the site so as not to draw away from existing provision.

CP12.D. 'Other' retail uses which includes leisure, cultural and tourists uses will again be considered in the hierarchy below Stroud as long as they:

1. 'are of a scale and nature that is appropriate to the size and function of the centre and
2. would not lead to unsustainable trip generation from outside their catchments.'[7]

[5] Your District Your Future, Stroud District Local Plan 2015 p.30
[6] Your District Your Future, Stroud District Local Plan 2015. P 130
[7] Your District Your Future, Stroud District Local Plan 2015. P 127

3.4.4 CP12. E Enables out of centre retail provision and will support:

1. 'bulky-goods non-food retail development so long as any increase in floorspace will not have an unacceptable impact on town centres and the proposal is in accordance with the sequential test as set out in national policy
2. specialist uses (including car showrooms) and trade centre developments not within key employment sites, where it will not have an unacceptable impact on a town centre
3. small-scale ancillary retail uses within employment sites (including showrooms)
4. changes of use to retail and other local services within existing neighbourhood centres and
5. small shops within residential areas to serve the local area.'[8]

3.4.5 Delivery Policy EI7 Non-retail uses in primary frontages

This gives suitable protection to primary shopping frontages for changes of use to non retail uses. However changes of use class to other 'A' uses will be permitted as long as it does not harm the overall retail off and if the '*retail units do not exceed 30% of total frontage length 50m either side from the application site edges*.' [9]

3.4.6 Delivery Policy EI9 Floorspace thresholds for impact assessments

Ensures that adverse increases in retail floor space or changes to existing sales of goods do not cause adverse impacts a retail needs assessment is necessary for applications over 500 sqm (gross) in Dursley town centre.[10]

3.4.7 Changes in Employment

The Stroud employment land review (2013) sites a number of previous studies that identify several growth sectors in the area, which are:

• Computing Services
• Construction
• Distribution
• Other Business Services
• Professional Services

It also states that 'trends are expected to lead to a greater number of businesses that are smaller in size, which are more dynamic and technology driven and which will come and go more fluidly.' [11]

[8] Your District Your Future, Stroud District Local Plan 2015. P 128
[9] Your District Your Future, Stroud District Local Plan 2015. P 135
[10] Stroud District Local Plan 2015. P 136
[11] Stroud District Employment Land Study AECOM 2013

Using the Oxford Econometrics model included in the employment land review (it should be noted that this is based on 2012 figures) by 2031 a number of sectors are expected to reduce in size, including utilities, manufacturing and public administration. There are also a number of sectors that are expected to experience significant growth including Professional, Scientific & Technical Services, Administrative & Support Services and Construction. Manufacturing is also predicted to reduce in size, however it should be noted that as previously stated Dursley has very high levels of manufacturing employment, so even if a reduction is experienced employment in the sector will still need to be accommodated. **Table 7**

4. Conclusions and Recommendations

4.1 Dursley has experienced significant reductions in the level of employment over the last five years, and has also see a reduction in the total number of businesses, with manufacturing and education seeing the most dramatic losses. There has been some growth in employment in wholesale and professional scientific and technical sectors and there has been increases in the number of construction and business administration companies, but unlike the surrounding areas of Stroud and Gloucestershire the local economy has been unable to rebalance and compensate for these losses in other sectors.

4.2 Local economic development policy at the LEP level does recognise the need to focus on business growth with the ‘Growth Hub’ service and the Stroud District jobs and growth plan providing a further recognition for the need to focus on business start up and growth. With the promotion of the small business loan fund and investment in local regeneration sites, of which Litttlecombe is included.

4.3 Retail is also seen as a driver for economic growth and the District Plan will deliver a town centres study, to help understand the future roles of the local high streets. This approach to the importance of the local town centres is further supported by the Stroud Local Plan policies CP12, E17 and E19. All of which give a strong level of protection to retail and associated uses, that will ensure the vitality and vibrancy of the local high street is maintained, whilst also enabling complementary retail uses, such as ‘bulky goods’ and ancillary food retail at Littlecombe, without developing a rival retail offer to the existing high street.

4.4 The 37 hectare site at Littlecombe presently has 16 ‘small business/ work units’ and a further allocation to provide up to 1500 jobs on site (including the medical centre). Policy DPEI1 will ensure that there is suitable land provision and protection of the present ‘B’ class employment uses to encourage inward investment. It is unlikely that traditional manufacturing/ industrial (B2) uses will be the source of future business growth on the site and it is likely to follow a more diverse light industrial, office (B1) and possible warehouse and storage (B8) source of business and employment growth, as seen elsewhere in the area.

4.5 In terms of the planning policy to include within the economy section of the Dursley NP, the existing economic development policies contained in the Stroud Local Plan deliver a suitable level protection for existing 'B' class and high street retail uses, whilst also encouraging an increased mix of general employment uses to encourage business and jobs growth.

4.6 It is suggested that the policy information outlined above (from the Stroud Local Plan) is included in the Dursley Local Plan to identify to potential investors the economy planning policy framework in the area. This has been condensed and should not need any further expansion.

4.7 The wider concerns of the neighbourhood plan group about the need to increase business start ups, develop the attractiveness of the high street and encourage the tourism economy is not relevant to planning policy as such and is supported instead through the Gfirst SEP and Stroud District Jobs and Growth Plan, which complement the local plan policies.

4.8 Action policies to consider:

4.8.1 Work with SDC and town centre retailers to set up a Business Improvement District (BID). This would provide a 1% increase in business rates, which would be retained by the BID to spend on interventions to improve retailing in Dursley.

4.8.2 Form a retailers association and link with both the area Federal of Small Business (FSB) and Chambers of Commerce, to develop retail support partnerships. Delivering marketing campaign and events to promote the retail and tourism offer of Dursley.

4.8.3 Direct marketing campaign of Growth Hub to businesses across Dursley, via Town Council web site, social media and membership organisations. Linking via DTC web site. Potentially hosting GH officer at town council officers, providing drop in advice and guidance sessions for local business.

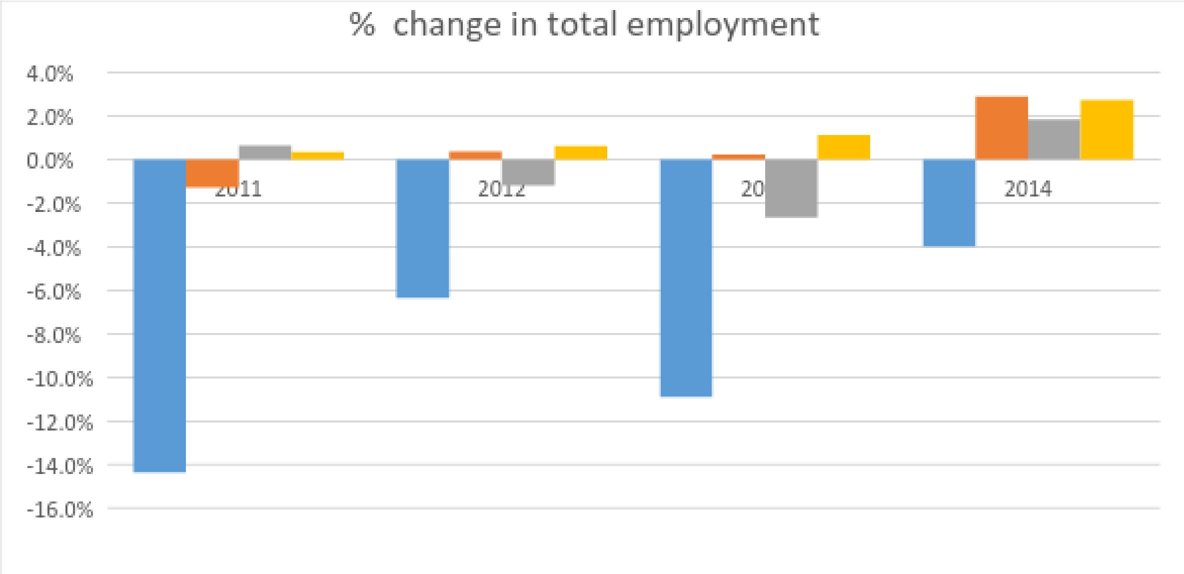
4.8.4 Link with local colleges and schools to promote apprenticeships to local businesses, via direct marketing activity and events.

4.8.5 Engage local businesses to develop a business directory for Dursley, which can be shared locally to encourage local trading and regionally via SDC and GCC.

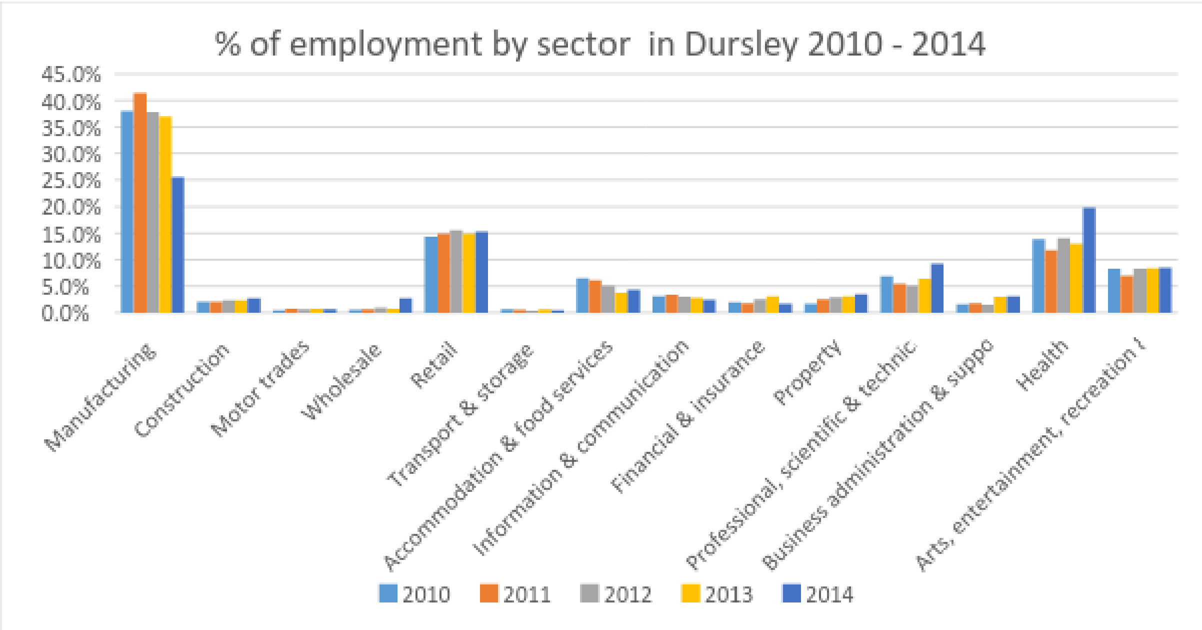
4.8.6 Form a tourism action group and link with tourism development officers from SDC and Gloucestershire County Council.

4.9 Specific actions on developing the local economy in terms of encouraging business start up and growth in established businesses, should be developed with the LEP Growth Hub team and economic development officers within Stroud District Council.

5. Evidence Base



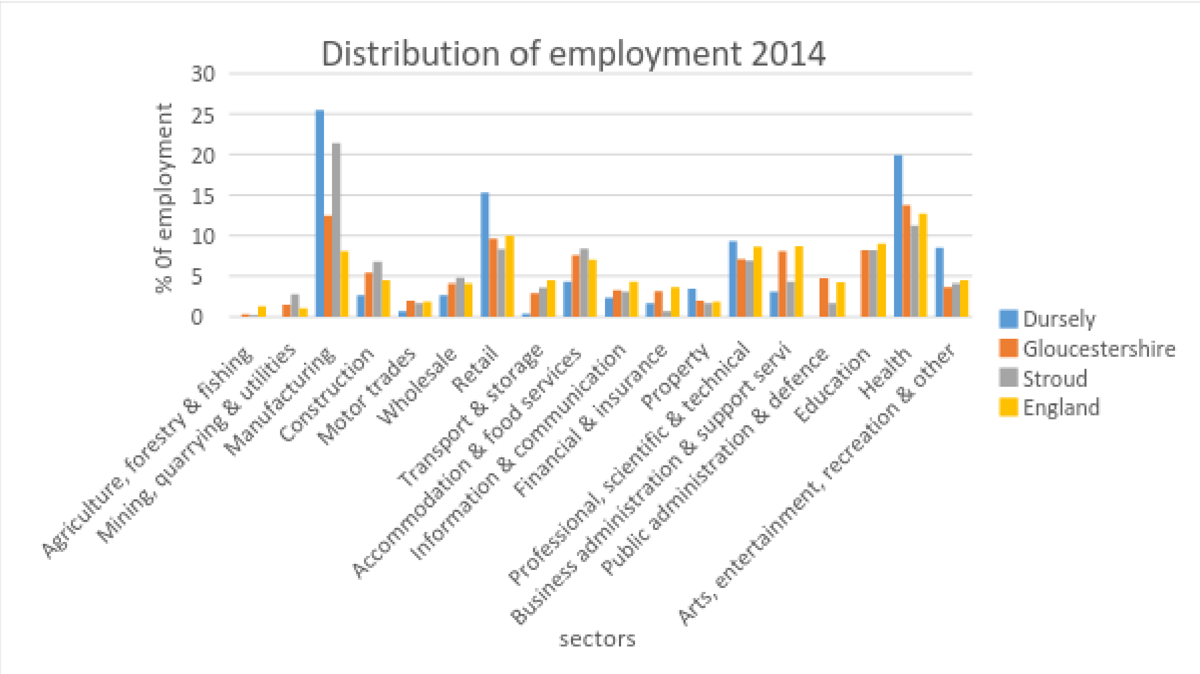
Graph 1: NOMIS - BRES 2016



Graph 2: NOMIS BRES 2016

% of employment by Sector Dursley	2010	2011	2012	2013	2014
Manufacturing	38.0%	41.4%	37.9%	37.0%	25.5%
Construction	2.0%	2.1%	2.3%	2.4%	2.7%
Motor trades	0.4%	0.7%	0.6%	0.8%	0.7%
Wholesale	0.6%	0.6%	0.9%	0.8%	2.7%
Retail	14.4%	14.9%	15.6%	14.9%	15.3%
Transport & storage	0.6%	0.5%	0.4%	0.6%	0.4%
Accommodation & food services	6.5%	6.1%	5.1%	3.8%	4.3%
Information & communication	3.1%	3.4%	3.0%	2.8%	2.4%
Financial & insurance	2.0%	1.8%	2.5%	3.1%	1.7%
Property	1.7%	2.5%	2.9%	3.1%	3.5%
Professional, scientific & technical	6.9%	5.5%	5.1%	6.4%	9.3%
Business administration & support services	1.6%	1.8%	1.5%	3.0%	3.1%
Health	13.9%	11.8%	14.1%	13.0%	19.9%
Arts, entertainment, recreation & other services	8.3%	6.9%	8.3%	8.4%	8.5%

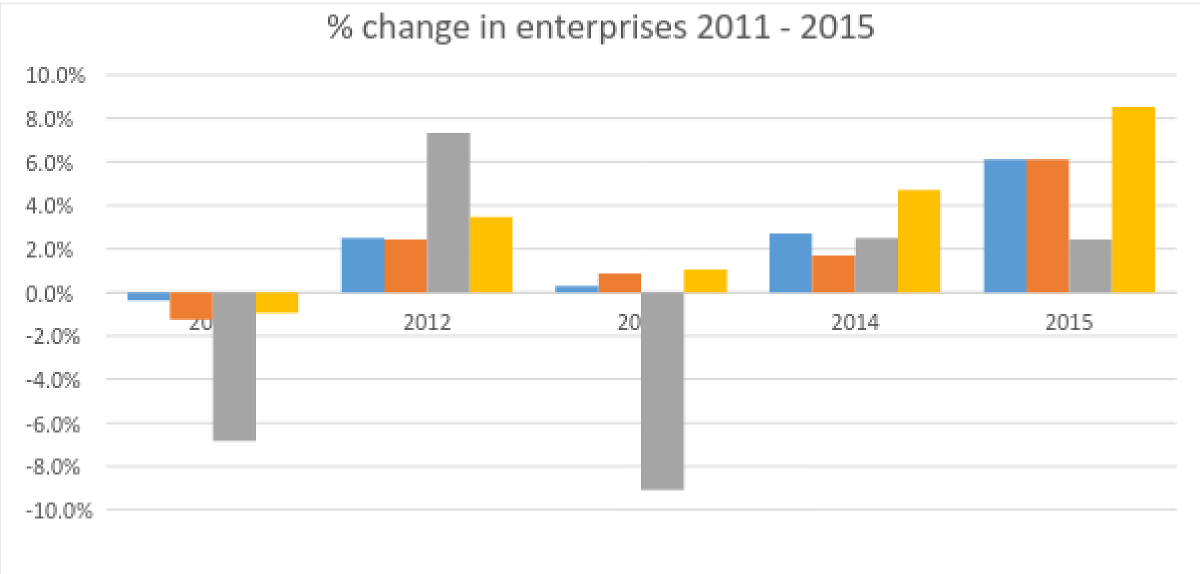
Table 1: NOMIS – BRES 2016



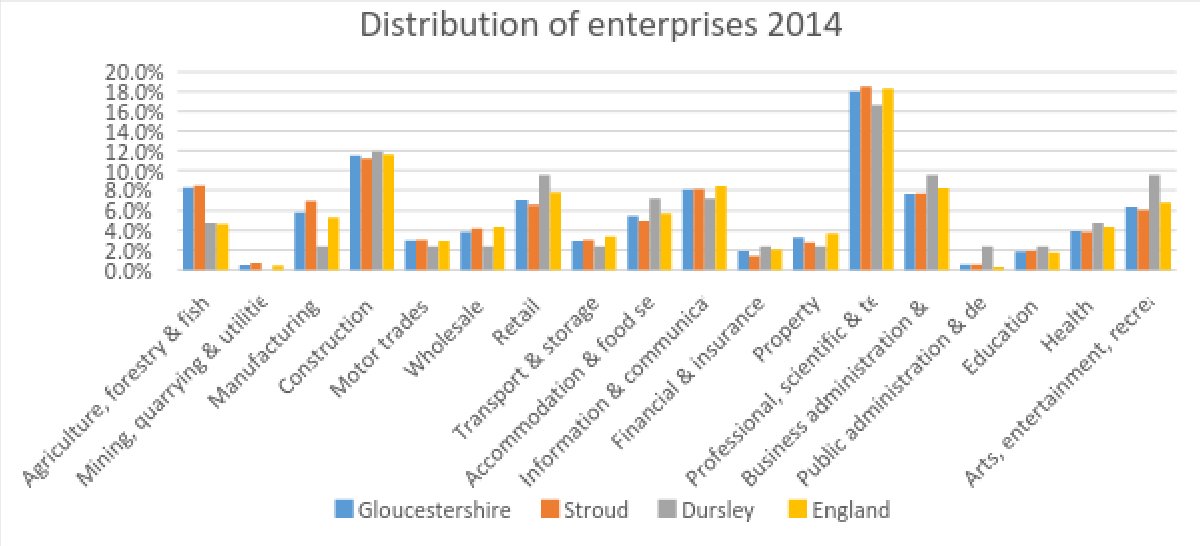
Graph 3: NOMIS – BRES 2016

Distribution of employment 2014	Dursely	Gloucestershire	Stroud	England
Agriculture, forestry & fishing	0	0.3	0.2	1.3
Mining, quarrying & utilities	0	1.5	2.8	1.1
Manufacturing	25.5	12.5	21.4	8.1
Construction	2.7	5.4	6.8	4.5
Motor trades	0.7	2.0	1.7	1.9
Wholesale	2.7	4.1	4.8	4.1
Retail	15.3	9.6	8.3	10.0
Transport & storage	0.4	2.9	3.6	4.5
Accommodation & food services	4.3	7.6	8.4	7.0
Information & communication	2.4	3.3	3.1	4.3
Financial & insurance	1.7	3.2	0.7	3.7
Property	3.5	2.0	1.7	1.9
Professional, scientific & technical	9.3	7.1	6.9	8.6
Business administration & support services	3.1	8.1	4.3	8.7
Public administration & defence	0.0	4.7	1.7	4.2
Education	0.0	8.2	8.2	9.0
Health	19.9	13.8	11.2	12.7
Arts, entertainment, recreation & other services	8.5	3.7	4.1	4.5

Table 2: NOMIS BRES 2016



Graph 4: NOMIS UK Business Counts /Enterprises 2016



Graph 5: NOMIS UK Business Counts/ Enterprises 2016

Distribution of Enterprises	Gloucestershire	Stroud	Dursley	England
Agriculture, forestry & fishing	8.2%	8.4%	4.8%	4.7%
Mining, quarrying & utilities	0.5%	0.7%	0.0%	0.5%
Manufacturing	5.8%	6.9%	2.4%	5.3%
Construction	11.5%	11.2%	11.9%	11.6%
Motor trades	3.0%	3.0%	2.4%	2.9%
Wholesale	3.8%	4.2%	2.4%	4.4%
Retail	7.0%	6.5%	9.5%	7.8%
Transport & storage	2.9%	3.0%	2.4%	3.4%
Accommodation & food services	5.5%	5.0%	7.1%	5.7%
Information & communication	8.1%	8.1%	7.1%	8.4%
Financial & insurance	1.9%	1.4%	2.4%	2.1%
Property	3.3%	2.8%	2.4%	3.7%
Professional, scientific & technical	18.0%	18.6%	16.7%	18.3%
Business administration & support services	7.6%	7.7%	9.5%	8.2%
Public administration & defence	0.6%	0.5%	2.4%	0.3%
Education	1.9%	1.9%	2.4%	1.7%
Health	3.9%	3.8%	4.8%	4.3%
Arts, entertainment, recreation & other services	6.4%	6.1%	9.5%	6.7%

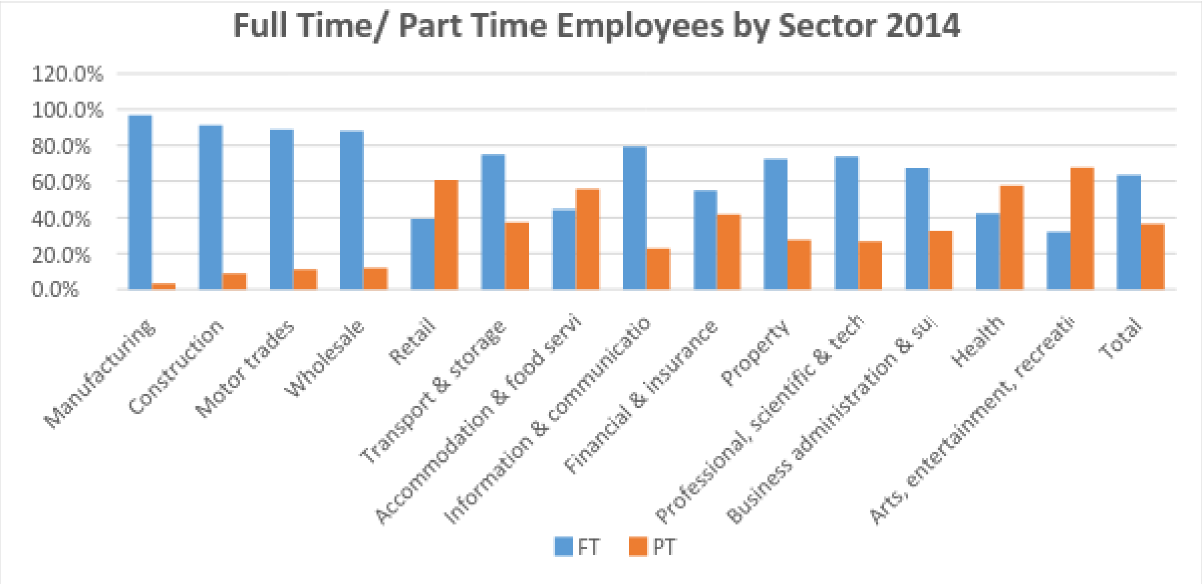
Table 3: NOMIS UK Business Counts / Enterprises 2016

Employment Size Band	Gloucestershire	Stroud	Dursley	England
0 to 4	76.1%	76.7%	76.2%	76.6%
5 to 9	12.6%	12.0%	14.3%	12.2%
10 to 19	6.2%	6.4%	7.1%	6.0%
20 to 49	3.2%	3.1%	0.0%	3.2%
Medium-sized (50 to 249)	1.6%	1.5%	0.0%	1.6%
Large (250+)	0.3%	0.2%	0.0%	0.4%

Table 4: NOMIS UK Business Counts/ Enterprises

Number of Employees Dursley	2010	2011	2012	2013	2014	2015
Total	220	205	220	200	205	210
Micro (0 to 9)	200	185	200	185	185	190
0 to 4	160	155	170	160	155	160
5 to 9	40	30	30	20	25	30
Small (10 to 49)	20	20	15	15	20	20
10 to 19	10	10	10	10	15	15
20 to 49	5	5	5	5	5	0
Medium-sized (50 to 249)	0	0	0	5	5	0
Large (250+)	0	0	0	0	0	0

Table 5: NOMIS UK Business Counts/ Enterprises



Graph 6: NOMIS BRES 2016

Part Time Full Time Employees by Sector	FT	PT
Manufacturing	96.8%	3.2%
Construction	91.2%	8.8%
Motor trades	88.9%	11.1%
Wholesale	88.0%	12.0%
Retail	39.2%	60.8%
Transport & storage	75.0%	37.5%
Accommodation & food services	44.3%	55.7%
Information & communication	79.5%	22.7%
Financial & insurance	54.8%	41.9%
Property	72.4%	27.6%
Professional, scientific & technical	73.8%	26.9%
Business administration & support services	67.3%	32.7%
Health	42.3%	57.7%
Arts, entertainment, recreation & other services	32.2%	67.8%
Total	63.5%	36.5%

Table 6: NOMIS BRES 2016

Projected Employment Change by Industry Sector 2012-2031

Sectors of Employment	Percentage Workforce Change
Agriculture	-14.3
Utilities	-37.5
Manufacturing	-12
Construction	23.6
Transportation & Storage	13
Wholesale & Retail	16.6
Hotels & Catering	18.9
Information & Communications	12.5
Real Estate	16.6
Finance & Insurance - -	
Professional, Scientific & Technical Services	42.5
Administrative & Support Services	45.1
Public Administration	-12.5
Education	-9.1

Table 7: Source: Oxford Economics/BE Group 2012 Taken From Stroud District Employment Land Study AECOM 2013