Town Centre Audits

Cinderford

2020

Content

1. Introduction

Town and City centres are complex places that serve a wide range of people and purposes. The importance of healthy vibrant town centres has been highlighted in recent years. In certain locations, due to the effect of vacant shops and a perception among some that their towns are not providing them with all the services they need or want, there has been found to be a negative impact on people's quality of life.

Town centres, and those who operate in and manage them, have to adapt to changing circumstances as global issues impact on local conditions. Similarly, local authorities are also having to adapt to rapid changes in the fiscal climate and increasingly challenging budgetary constraints.

As with any change process, it is important to be able to measure where we are, monitor progress, learn from others and realistically compare and measure performance. This report aims to record key sets of data/evidence that can be used by those with an active interest in improving the experience and vitality of town centres, so that they in turn provide a healthy sustainable environment for the businesses and communities that depend on them.

The data presented in this document reflects the 12 month period following the previous report (July 2019 to July 2020). However due to the National Lockdown some data was collected post this timescale and as such has been included in this report to enable a full picture to be presented.

1.1 Successful Town Centres

1.1.1 This report follows the guidelines/suggestions laid out in the 'Successful Town Centres – Developing Effective Strategies: Indicators Toolkit' The document was launched by the Gloucestershire Local Enterprise Partnership in March 2013.

1.1.2 This report presents key findings which can be used to evaluate the effectiveness of Cinderford town centre. It focuses on key themes such as footfall, vitality and economic characteristics to highlight emerging trends so that strategic actions can be taken to enhance the town centre performance.

1.1.3 The indicators toolkit advises that a number of indicators are assessed. This report monitors the following indicators:

- Footfall
- Car Parking
- Retail and Commercial Offer
- Trader Types
- Culture and Leisure Offer
- Events
- Reported Crime
- Markets

- Charity Shops
- Vacant Shops
- Town Centre Investment
- Evening/Night Time Economy

1.1.4 The town centre performance toolkit aims to monitor the performance of the town centre by collecting data on various themes which are reviewed annually, enabling a comparison of town centre performance.

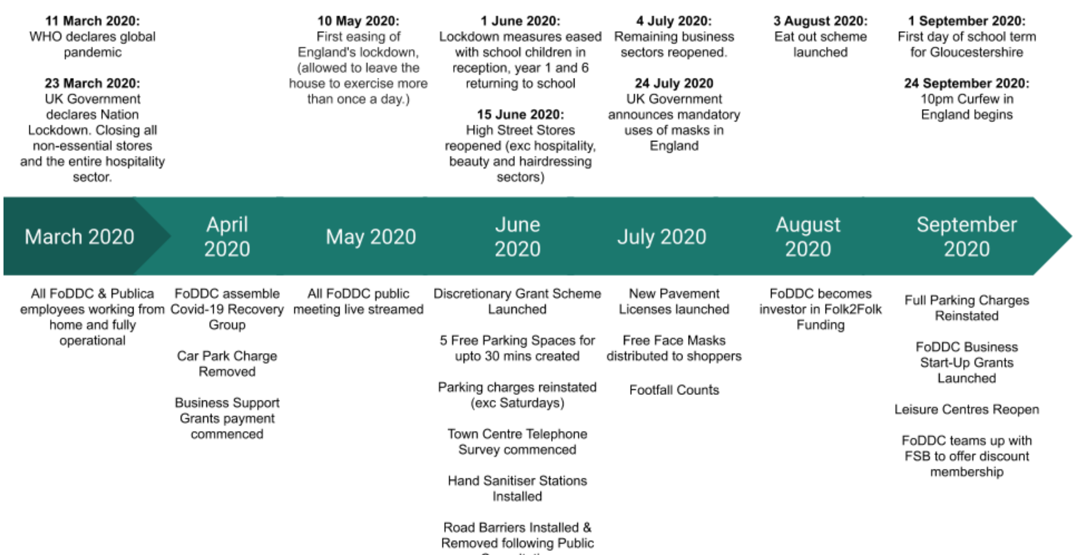
1.1.5 It is suggested that this report be updated on a yearly basis to provide a year on year indication of the health and viability of Cinderford town centre.

1.1.6 It should be noted that the purpose of this document is not to address the future needs of the town centre, but an audit to provide information for annual comparisons. The aim is to provide a range of data sets for the reader to interpret.

1.2 Covid-19

1.2.1 This year is of course very different from others in that the world has been dealing with the Covid-19 Global Pandemic. The effects of this virus will be felt for many years across a multitude of areas. We have tried to capture the initial impact it has had on Cinderford's town centre in this report.

1.2.2 The timeline below outlines the national and local decisions which have impacted the town centres within the Forest of Dean:



1.2.3 As shown above, Forest of Dean District Council and the Town Council took steps to ensure the safety of the town's residents whilst maintaining business operations.

1.2.4 Community efforts saw the town centres and shopping habits change within the first few months of the pandemic.

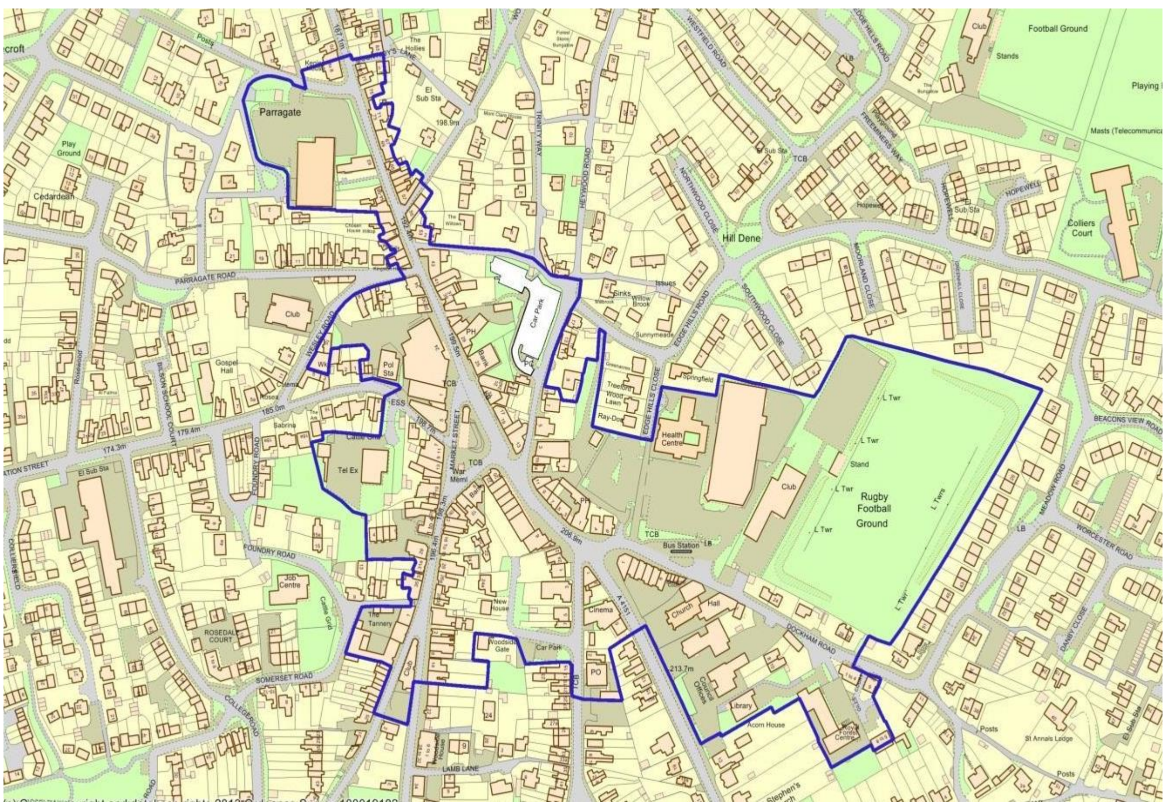
1.2.5 Central Government introduced rate relief, furlough, VAT relief and business grant schemes. As of September 2021, Forest of Dean District Council has paid out business grants to eligible businesses within the wider district to the sum of £21.6m.

1.2.6 A further £1.1m was then distributed to a further 160 businesses under Forest of Dean District Council's Discretionary Business Grants Scheme.

1.2.7 A survey of 10 businesses in each town was carried out prior to 14 June 2020 which gave a snapshot of the town's economic status. Results can be found in Appendix 3.

1.3 Cinderford Town Boundaries

The designated Town Centre Boundary is shown below (boundary outlined):



2. People and Footfall

The overall aim of obtaining this data is to provide an assessment of who comes to visit the town centre.

The town centre's car parking (in and around the town centre) is included to account for the fact that a large proportion of visitors to many town centres still travel using their own means of private transport in a similar way to how they would visit out-of-town shopping centres.

2.1 Footfall

Footfall refers to the number of people walking up and down a given town centre (or single street) regardless of their reasons for doing so. Typical reasons may include shopping, a pleasant stroll, going to work or school/college, to the cinema or for a meal, accessing public services, visiting friends or simply passing through. Footfall is often linked to the level of attractiveness of a location and its ability to satisfy customer and visitor needs and expectations successfully.

The information below provides a summary of the 10 minute footfall counts for 2020-2013, 2009, 2008 and 1999. The 10 minute average has been calculated across the whole week (weekday and weekend counts).

It should be noted that different methodology was used to collect data for footfall counts in 1999 and 2008/2009.

The methodology used in 2013 and onwards is as per the guidance stated in the 'Successful Town Centres – Developing Effective Strategies: Indicators Toolkit' (pg.5). The methodology stated in this document should be used to repeat the data collection on an annual basis. Data was collected in one location on a Wednesday, Friday and Saturday for 1 hour starting at 10.30. Footfall was recorded for both sides of the street, noting people walking either direction.

2.1.1 Footfall Summary Comparison

2.1.1.1 **10 Minute Average Summary Comparisons**

2020	2019	2018	2017	2016	2015	2014	2013	2009	2008	1999
38	63	93	63	75	79	81	78	91	85	212

2.1.1.2 The table above shows the results of the footfall counts for each recorded year. The 2020-2013 footfall counts were recorded on Wednesday, Friday and Saturday. The 2009 footfall counts were recorded on Monday and Saturday. The 2008 footfall counts were recorded on Wednesday and Saturday. The 1999 counts were recorded on a Friday and Saturday.

2.1.1.3 Due to the Covid-19 pandemic, the 2020 counts were carried out over an extended period of 4 weeks and as such the count data for this year is an average of the 4 week of duration.

2.1.1.4 Counts were conducted for an hour and recorded at 10 minute intervals. Counts were taken outside McColls, 8 High Street.

2.1.2 Effects of Covid-19

2.1.2.1 Due to the Covid-19 pandemic, restrictions and social distancing measures were put in place by the Government which included shielding for vulnerable residents. Due to the demographic of the Forest of Dean's residents this saw a large proportion of the local population being advised to stay indoors for 12 weeks from 23 March 2020.

2.1.2.2 A Nationwide lockdown meant that store fronts were closed apart from those providing ‘essential shopping’ (Supermarkets, Other Food Stores & DIY Stores and Pharmacies). Non-essential stores saw a slow and staggered reopening from May 2020.

2.1.2.3 Compulsory use of Masks whilst shopping was introduced in England on Friday 24 July 2020 and a visual audit on 24 and 25 July 2020 showed nearly 98% of shoppers were already prepared for these changes.

2.1.2.4 The restrictions referenced, mandatory shop closures and a heightened awareness of health risks resulted in the High Street seeing reduced footfall levels throughout the audit. However results confirmed that this was slowly increasing post-lockdown.

2.1.2.5 A full report on the effects Covid-19 had on footfall can be seen at Appendix 3.

2.2 Car Parking

2.2.1 This indicator refers to the total public car parking usage in and around the town centre.

2.2.2 For many people, the possibility of driving into town and parking their car in a safe car park remains a considerable element of convenience-based attractiveness as it grants them a higher sense of perceived comfort and independence. Many retailers and high street businesses would tend to agree with this and, in some cases, would prefer for their customers to be able to park near their shop or outlet for ease of access.

2.2.3 Parking plays a significant role in mobility, access and the economic development of a town centre. The town centre car parking market has increased in importance as the market for cars has grown. Cars have become a fundamental element of journey mobility and in consequence parking has followed suit.

2.2.4 Car parking has always been important in regard to mobility, since it's a fundamental element in achieving a high level of accessibility. Many businesses and towns centre see an adequate supply of parking, especially for visitors, as crucial for their competitive growth, yet at the same time, parking is and will remain as the most powerful means of traffic restraint available.

2.2.5 Measuring and monitoring the level of car park usage, along with footfall contribute to a dynamic picture of activity levels in the town centre. Over time, this data can provide the basis of a comparison between actual perceived variances of activity and the impact of initiatives like events, special offers and the arrival or departure of high profile businesses.

2.2.6 The Forest of Dean District Council Cabinet made the decision to implement car parking charges in September 2011, with charging commencing on 1 July 2012.

2.2.7 Car parking charges were increased by Forest of Dean District Council in October 2019 which came into effect in June 2020 (they were due to be implemented in April 2020, however this was delayed due to Covid-19).

2.2.8 The table below shows the recorded monthly figures for tickets purchased within the period of June 2019 to August 2020.

Heywood Road:

MONTH	NO. OF TICKETS OF PURCHASED
June 2019	2495
July 2019	2532
August 2019	3155
September 2019	2589
October 2019	3044
November 2019	2329
December 2019	2070
January 2020	3279
February 2020	2346
March 2020	1828
April 2020	COVID-19 Charging Suspended
May 2020	COVID-19 Charging Suspended
June 2020	293
July 2020	1330
August 2020	988

2.2.8 Based on a monthly recording for Heywood Road car park, the average ticket sales for Cinderford between last year's report and this year has decreased. A fall from 2,615 tickets per month in 2018/2019 to an average of 1,885 tickets per month in 2019/2020 will no doubt be due in part to COVID-19 - a reduction in shoppers during lockdown and beyond meant a reduction in vehicles.

2.2.9 Due to Covid-19, the car park charges were suspended for April and May 2020 however free parking on Saturdays remained until 1 September 2020. In June 2020 Cabinet also introduced 5 free short term (30 minutes) parking bays per town.

3. Diversity and Vitality of Place

The overall aim of this theme is to provide an assessment of the actual offer of the town centre and its diversity taking an all-inclusive approach that includes daytime, evening and night time economies.

The approach does not differentiate here between the public and private sectors as it is interpreted that both contribute to the provision of services, products and an overall experience for town centre visitors to enjoy and keep coming back to. This theme does not monitor consumer demand, expectations or their perceptions of the offer provided by the town centre. This should be covered by a separate theme.

The ‘Diversity and Vitality of Place’ section covers the following key items; Retail and Commercial Offer, Convenience and Comparison, Trader Types, Culture and Leisure Offer, Events, Reported Crime and Markets.

3.1 Retail and Commercial Offer

3.1.1 This indicator keeps track of the range and variety of retail goods and services offered in the town centre, measured as the change in the number of businesses in each category over a 12 month period.

3.1.2 In order to remain competitive, town centres need to ensure they provide a level of offer that matches the demand of their current (or intended) visitors and consumers.

3.1.3 This indicator is often linked to footfall and levels of business as well as visitor satisfaction. It can also be used (in conjunction with other indicators) to monitor the balance and relationship between the area’s daytime and night time/evening economies.

3.1.4 The retail and commercial offer is broken down into Use Class Orders.

3.1.5 On 1 September 2020 the Use Classes Order of 1987 was amended. We have amended the way we report Use Classes as a result.

3.1.6 It should be noted that the number of units recorded sometimes differ between each year. This may be as a result of the division of shop units, or very slight variations on the area assessed.

Cinderford Use Class Breakdown 2020:

OLD USE CLASS	NEW USE CLASS	NO. OF UNITS	% WITHIN EACH CLASS	NO. OF UNIT 2019
A1	E	48	47%	49
A2	E	10	10%	10
A3	E	6	5.5%	8
B1	E	1	1%	2
D1	E	6	5.5%	7
D1	F.1	7	6.5%	6
A4	Sui Generis	1	1%	2
A5	Sui Generis	8	7.5%	8
D2	Sui Generis	1	1%	1
Sui Generis	Sui Generis	1	1%	0
Vacant	Vacant	14	14%	12
	Total	**103**	**100%**	**105**

3.1.7 In 2019 two buildings in Cinderford which previously housed shops were demolished which explains the variance in the total number of units between 2019 and 2020.

3.2 Trader Type

3.2.1 The vitality of a town centre depends highly on the quality and variety of retailers represented. National retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town.

3.2.2 The character and profile of a town often also depends on the variety and mix of independent shops that can give a town a 'unique selling point' and help distinguish it from other competing centres.

3.2.3 A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town.

3.2.4 The following shops below are considered key attractors by Experian Goad.

Department Stores	**Clothing**
BHS	Burton
Debenhams	Dorothy Perkins
House of Frazer	H & M
John Lewis	New Look
Marks and Spencer	Primark
	River Island
Mixed Good Retailers	Topman
Argos	Topshop
Boots	
TK Maxx	**Other Retailers**
WH Smith	Carphone Warehouse
Wilkinson	Clarks
	Clintons

Supermarkets	Other Retailers
Sainsbury’s	HMV
Tesco	O_2
Waitrose	Superdrug
	Phones 4 U
	Vodafone
	Waterstones

3.2.5 Multiple Traders have countryside presence and are well known household names. Regional shops are identified as those with stores / units in several towns throughout one geographical region only and independent shops are identified as those that are specific to a particular town.

3.2.6 The following table provides a percentage of the class code A1 (now under the new ‘E’ Class Code) shops which are Key Attractors, Multiples, Regional, and Independent to the locality.

	National Small Towns %	Cinderford %
Key Attractor	7	2
Multiples	18	15
Regional	10	10
Independent	65	77

3.2.7 77% of the A1 shops (now under the new ‘E’ Class Code) in the town centre are unique to Cinderford, considerably higher than the national average of 65%. 15% of these shops have a nationwide presence, whilst 10% of the town contains stores that are regionally significant, corresponding to the national average.

3.3 Culture and Leisure Offer

3.3.1 This indicator captures the variety of leisure related services offered in the town centre, including publicly supported services such as swimming pools and theatres.

3.3.2 Interaction with other people, cultural activities and a bit of enjoyment not related to a ‘to do/buy’ lists are some of the many reasons why people come to town centres.

3.3.3 This indicator captures this characteristic of town centre activity.

3.3.4 The following provides an indication of the cultural and leisure offer within Cinderford town centre for 2020.

FACILITY	2020
Museums	0
Art Galleries	1
Art Centre	1
Take Away	8
Restaurants and Cafés	5
Swimming Pools	0
Gyms	0
Cinemas	1
Theatres	0
Community Halls	2
Parks/Gardens	0
Games Arcade	0
Other Specialist Outlets	2 (Library & Rugby Club)

3.4 Events

3.4.1 This indicator keeps track of the number of events held in the town centre public realm, measured using local authority's data of event licenses awarded over a 12-month period and those held in town centre venues that have a significant impact on footfall.

3.4.2 Events and festivals are a major reason for people to come to town centres. A diverse event offer can be a major source of attraction for visitors as well as local residents, particularly if these events take place throughout the year and are aimed at different audiences (e.g. cultural tourists, business tourists, young people, children, families, ethnic minorities).

3.4.3 Events can make a significant contribution to the local economy and foster a stronger sense of community among residents, promoting pride of place and inclusiveness.

3.4.4 Typically, events may range from small carnivals or fairs, to major cultural festivals, conferences.

3.4.5 Licensed events in Cinderford over the past year are as follows (date shown is when application was made). It should be noted that many of the usual yearly events were cancelled due to the Covid-19 restrictions.

Road Closure Orders:

Date	Location	Reason
November 2019	Cinderford Town Centre	Christmas Light Switch On
-		

Temporary Event Notices:

Date	Location	Reason
November 2019	Cinderford Town Centre	Christmas Light Switch On
-		

Premises Licences:

None Requested

Pavement Licences:

None Requested

3.5 Reported Crime

3.5.1 This indicator monitors the number of reported incidents of crimes in a range of categories in the town centre.

3.5.2 In some cases, fear of crime can act as a deterrent for people not to visit a town centre, particularly in the evenings and at night. Yet, as powerful as perceptions can be in influencing people's behaviour, they are not always directly related to reality.

3.5.3 This indicator will allow its users to contrast these perceptions (captured in the "crime and safety perceptions" indicator) with actual reported crime statistics.

3.5.4 It is important to note that the data included within this section act as an indicator.

3.5.5 The data provides information on reported crime within Cinderford Town Centre from June 2019 - April 2020.

	Jun 19	July 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20
Violence and Sexual Offences	**4**	**6**	**4**	**5**	**5**	**7**	**2**	**2**	**3**	**2**	**-**
Anti-Social Behaviour	**6**	**4**	**5**	**9**	**4**	**-**	**3**	**3**	**1**	**8**	**12**
Criminal Damage and Arson	**7**	**-**	**1**	**-**	**1**	**1**	**1**	**5**	-	**-**	**-**
Vehicle Crime	**-**	**-**	**-**	**-**	**1**	**-**	**-**	**6**	**-**	**-**	**-**
Burglary	**-**	**-**	**1**	**-**	**1**	**3**	**-**	**5**	**-**	**-**	**2**
Other Theft	**-**	**-**	**-**	**-**	**1**	**-**	**1**	**5**	**-**	**-**	**-**
Drugs	**1**	**1**	**1**	**-**	**-**	**-**	**-**	**-**	**-**	**1**	**-**
Robbery	**-**	**1**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
Shoplifting	**2**	**-**	**-**	**-**	**-**	**3**	**3**	**1**	**-**	**-**	**-**
Other Crime	**1**	**1**	**2**	**-**	**1**	**1**	**-**	**4**	**-**	**-**	**-**
Public Disorder	**1**	**-**	**2**	**-**	**-**	**1**	**2**	**-**	**1**	**2**	**1**
Theft from a Person	**-**	**1**	**-**	**-**	**-**	**-**	**1**	**-**	**-**	**-**	**-**
Possession of a Weapon	**-**	**1**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
TOTAL	**22**	**15**	**16**	**14**	**14**	**16**	**13**	**31**	**4**	**13**	**15**

3.5.6 This data is taken from the Police UK website. Further information on the crimes committed and the status of the investigations into them can be accessed using the website. Users can select the geographical area they are interested in, click on **Explore the Crime Map** and then search by Type of Crime, Month Reported and more.

3.6 Markets

3.6.1 This indicator monitors the existence of regular markets in the town centre.

3.6.2 Markets, like events, can be a major motivating factor for people to come to a town centre. The presence of a regular (albeit temporary) traditional market can add diversity to the retail offer of a town centre and can act as a catalyst for other more specialist markets to come to the area, including farmers' markets, artisan markets, continental markets, Christmas markets, night markets, etc.

3.6.3 All of this can contribute to the area's diversity of offer, satisfy a wider range of needs and attract local residents as well as visitors from a growing catchment area.

3.6.4 The National Market Trade Federation has no record of any Markets being held in Cinderford. It should however be noted that there is currently a very small Farmers Market on a Friday morning in the Triangle area. However, due to the COVID-19 pandemic these markets were cancelled from March 2020. The markets did not return in the reporting period and are not due to return prior to 2021.

4. Economic Characteristics

The overall aim in this theme is to provide users with an assessment of static and dynamic elements linked to the economic performance of a town centre. Some of the more 'static' elements, which in turn may influence perceptions, will include changes in the number of charity shops or vacant retail units.

4.1 Effects of Covid-19

4.1.1 Due to Central Government-imposed restrictions, a large percentage of stores within the Market Towns closed to the public. This largely affected non-essential retail, health and beauty providers and the hospitality sector. These rules were in place between the periods of 23 March 2020 to 4 July 2020.

4.1.2 The restrictions on stores in Cinderford initially affected 87 out of the 98 occupied businesses within the town boundary. This number reduced significantly following a relaxation in the lockdown.

4.1.3 By 5 July 2020, 54 of the businesses reopened to the public either fully or partially on an appointment-only basis.

4.2 Charity Shops

4.2.1 This indicator monitors yearly changes in the number of charity shops in a town centre.

4.2.2 Over the last fifteen years, the proliferation of charity shops in town centres may have been interpreted in certain circles as a sign of decline. On the other hand, charity shops fill an important gap in the retail offer of any town centre, not just in towns and cities with more modest income catchment areas and/ or ageing demographics.

4.2.3 Charity shops provide a valuable reuse and recycling function, reducing the volume of waste going to landfill and bring in valuable income for worthy causes. Charity shops are cutting across social and demographic boundaries in attracting customers, providing affordable and specialist items.

4.2.4 Regardless of how the existence of charity shops is interpreted, their growth or decline impacts on perceptions and forms an important element in the monitoring of the economic performance of any town centre.

4.2.5 This indicator alone can act as a barometer for the impact of strategic decisions on the daytime economy of a town centre.

4.2.6 The information below details the number of charity shops within the town centre for 2020 and previous years.

2020	2019	2018	2017	2016	2015	2014	2013	2008
4	4	4	4	4	3	4	4	4

2019	2020
Dean Forest Hospice, 5 Heywood Road	Dean Forest Hospice, 5 Heywood Road
Sue Ryder Care, 3 Heywood Road	Sue Ryder Care, 3 Heywood Road
Dial-a-Ride, 2a High Street	Dial-a-Ride, 2a High Street
Age Concern, 6 High Street	Age Concern, 6 High Street

4.2.7 Nationally, some traders report concerns about the proportion of new goods on sale in charity shops. As charities are able to claim up to 80% discount on their business rates, this could be interpreted as unfair competition.

4.2.8 Due to the COVD-19 pandemic a number of the charity shops within the district have remained closed or are operating on reduced hours.

4.3 Vacancy

4.3.1 This indicator monitors changes in a town centre's vacant retail units. An increase in vacant retail units in town centres has traditionally been linked to economic decline both locally and nationally.

4.3.2 On the other hand, this could also be interpreted as a temporary opportunity for the town centre to strategically re-balance its visitor offer, and for culture and leisure-related outlets and community services to gain more of a foothold in the town centre.

4.3.3 Regardless of how vacant retail units are interpreted, their growth or decline forms an important element in the monitoring of the economic performance of any town centre.

CINDERFORD VACANT UNITS 2020

Vacant Unit Quantity	Units Surveyed	% of Vacant Units
14	103	14

LIST OF EMPTY UNITS:

- 67a High Street
- 36 High Street
- 43 High Street
- 27 High Street
- 27a High Street
- 25 Market Street
- 14 Commercial Street
- 4 Commercial Street
- 3 Commercial Street
- 2 Commercial Street
- 12 Market Street
- 6 Market Street
- 1 High Street
- Former Health Centre, Dockham Road

4.4 Town Centre Investment

4.4.1 This indicator monitors evidence of public realm improvements and the level of investment from both the private and public sectors within the town centre of Cinderford.

4.4.2 The growth of online shopping, rising business rates, and other economic challenges has resulted in many areas with struggling town centres that either have become stagnated or in decline.

4.4.3 In order to revitalise town centres, local authorities must think afresh about the role of the high street and what it provides for local communities. Incorporating new homes, alongside renewed retail, commercial and leisure space can play a key role in building a walking catchment population that can sustain the towns uses more effectively. Proactively leading investment in town centres, through the acquisition and re-purposing of assets such as initiating event programmes and investing in the public realm are crucial ways of creating confidence in places and the right conditions to rejuvenate a town centre.

4.4.4 Cinderford Town Council, with Forest of Dean District Council support has recently made a bid for a share of the Governments £675 million Future High Street Fund Scheme. Decisions on which areas have been successful should be announced this winter.

4.5 Evening and Night Time Economy

4.5.1 This indicator monitors evidence of active management of the evening and night time economies in the town centre.

4.5.2 The majority of town and city centres (or at least parts of them) do not go to sleep after the last shop closes for the day. They often have evening and night time economies too, which may vary in size and character from one location to another.

4.5.3 In some areas, this part of the economy forms a crucial part of the service offer.

4.5.4 In many cases, the town centre attracts a completely different demographic of customers in the evening to those who visit the high street during the day time.

4.5.5 It is also worth distinguishing between the evening consumers (5-8 pm often referred to as the ‘shoulder period’) and the late night consumer, as each can have quite different demographics.

4.5.6 Evidence is building to support the collective and active management of town centres after dark to increase visitor confidence, improve perceptions, prevent crime and disorder, and provide a healthy trading environment for a range of businesses and providers who operate at night.

4.5.7 This indicator enables users to monitor how effectively the evening and night time economies are managed (if they are managed at all) in a town centre.

4.5.8 The retail pathfinder toolkit advises that the Purple Flag recognition system is used. Purple flag is the accreditation scheme that recognises excellence in the management of town and city centres at night. Entertainment areas that achieve the standard will be those that can offer a better night out to visitors. Purple flag aims to raise the standards and improve the quality of towns and cities at night.

4.5.9 Cinderford town centre is not accredited as a purple flag location.

4.5.10 Due to restrictions in place from the Government due to the Covid-19 pandemic, all pubs/clubs and restaurants were put on a mandatory lockdown, unless they served takeaway from 23 March 2020 to the 4 July 2020.

4.5.11 On 24 September 2020, the Government imposed a 10pm curfew on all pubs, restaurants and takeaways.

5. Conclusion

5.1 The ten minute average footfall figures have decreased this year to 38,by far the lowest figure recorded, down from last year's 63 (per 10 minute average). The counts were completed in July 2020, post lockdown but it's clear that COVID-19 has had a drastic effect on the high street. Appendix 3 provides a detailed count breakdown.

5.2 Based on a monthly recording for Heywood Road car park, the average ticket sales for Cinderford between last year's report and this year has decreased. A fall from 2,615 tickets per month in 2018/2019 to an average of 1,885 tickets per month in 2019/2020 will no doubt be due in part to COVID-19 - a reduction in shoppers during lockdown and beyond meant a reduction in vehicles. The car park charges were suspended for April and May 2020 and free parking on Saturdays remained until 1 September 2020. When April and May are removed from the calculation the average monthly ticket sales are 2,175 - down 440 per month on 2019's figures.

5.3 The town centre's retail and commercial offer has changed since 1999 and this is consistent with national trends and the variety of ways consumers choose to shop, providing a level of resilience for the town of Cinderford. We have compared 2019 and 2020 data, taking the New Use Classes introduced in September this year into account. The results are very similar with very few variations.

5.4 The majority of the A1 shops (77%) in Cinderford are independent; offering the towns a unique selling point. 15% of Cinderford's shops/services are nationwide, while 10% are regionally significant.

5.5 The vacancy rate for 2020 has increased from the previous year with 14 of the 103 ground floor premises empty (at the time of the audit), which equates to 14%. The Local Data Company reports that Nationally High Street vacancies increased to 12.4% in Q2 (1 April – 30 June 2020).

5.6 The number of reported crimes has remained relatively consistent over the past year with only minor variations within each of the different categories of crime. Mirroring last year's data, violence and sexual offences and anti-social behaviour are the most common types of crime. There has been an increase in vehicle crime, and a decrease in shoplifting this year.

5.7 We will of course be able to provide additional evidence of the COVID-19 impact on Cinderford Town Centre when we undertake further monitoring next year.

Appendix 1

6. Use Class List 2020

ADDRESS	SERVICE	USE CLASS
79-79a High Street	Electrical Services	E
67a High Street	Vacant	Vacant
Lidl, Paragate Road	Lidl Foodstore	E
61-63 High Street	Ashton and Daniels Optometrist	E
56 High Street	Exodus Hair Salon	E
54 High Street	Jolly Forest Fryer - Fish and Chips	Sui Generis
46 High Street	Jonny’s Barbershop	E
44 & 44a High Street	Ark Property Management	E
40 High Street	Tattoo	Sui Generis
38 High Street	Exquisite Nail & Beauty	E
36 High Street	Vacant (was Greengrocers)	Vacant
43 High Street	Vacant (was The Forester)	Vacant
41 High Street	Serenity	E
34 High Street	No: 32 HairDressers	E
37-39 High Street	Curry Leaf Indian Takeaway	Sui Generis
35 High Street	Mark Harper MP Office	F.1
33a High Street	Mobile King Repairs	E
31 High Street	Cutting Edge Hair & Beauty	E

ADDRESS	SERVICE	USE CLASS
29 High Street	Nails and Beauty	E
27 High Street	Vacant (Was Golden Lion Pub)	Vacant
27a High Street	Vacant	Vacant
25 High Street	Lloyds Bank	E
Westgate Stores	The Original Factory Shop	E
23 High Street	Scoops Cards	E
21a High Street	Bidmead Cook	E
21b High Street	Bidmead Cook	E
17-19 High Street	TSB	E
15a High Street	KJT Residential - Estate Agents	E
13 High Street	Cinderford Local	E
11 High Street	Jasmine Café	E
5 Heywood Road	Dean Forest Hospice Charity Shop	E
3 Heywood Road	Sue Ryder Care Charity Shop	E
1a Heywood Road	SAJ Indian Takeaway	Sui Generis
1b Heywood Road	Fork 'n' Spoon Chinese Takeaway	Sui Generis
1 Market Street	Real Deal	E
3 Market Store	Mel's Top Cutz	E
5-7 Market Street	Carpenters - DIY Store	E
9-11 Market Street	Boots Pharmacy	E
13 Market Street	Wyedean Healthfoods	E
15 Market Street	McClean’s General Store and Clothing Boutique	E

ADDRESS	SERVICE	USE CLASS
17 Market Street	Taylors Jewellers	E
19 Market Street	AB FAB Flooring	E
Lower Ground Kiosk, Market Street	Truly Scrumptious Baguette Shop	E
Upper Kiosk, Market Street	The Barber Shop	E
25 Market Street	Vacant (was Elsa's Pet Shop)	Vacant
31a Market Street	Thirty One	E
37a Market Street	Reptiles and Aquatics Angling	E
1a Victoria Street	RMD Key Cutting	E
1 Commercial Street	Soldiers and Sailors Club	E
16 Commercial Street	Bowketts Off License	E
14 Commercial Street	Vacant (Was Gwyn Jones + Co. Solicitors)	Vacant
6 Commercial Street	The Chippy, Cinderford	Sui Generis
4 Commercial Street	Vacant	Vacant
3 Commercial Street	Vacant (Was RMD Computer Repairs)	Vacant
2 Commercial Street	Vacant	Vacant
26a Market Street	CJ Bakery	E
26 Market Street	My Dentist Dental Care	E
16-18 Market Street	Premier	E
14 Market Street	Vape It Easy	E
12 Market Street	Vacant (was Digital Forest Web Café)	Vacant
10a Market Street	Vintage Rose Florist	E
8 Market Street	The Doghouse (Micro Pub)	Sui Generis

ADDRESS	SERVICE	USE CLASS
8c Market Street	Greenhill Coffee House	E
6 Market Street	Vacant	Vacant
22 High Street	Camerons Butchers	E
20 High Street	Lotus Restaurant	E
18 High Street	The Crusty Loaf Bakery	E
16 High Street	LYA Barbers	E
14 High Street	Dave and Jean Jackson Butchers	E
12 High Street	Pick-a-Pizza	Sui Generis
10 High Street	Cinderford Kebab and Pizza	Sui Generis
8 High Street	McColl's Newsagents	E
6 High Street	Age Concern	E
4 High Street	Betfred	E
2 High Street	Gordon Blake Funeral Directors	E
2a High Street	Dial-a-Ride Charity Shop	E
Cinderford Delivery Office	Post Office	E
3 Woodside Street	Art Space Cinderford Gallery	E
1 Woodside Street	David Kear Opticians	E
1 Belle Vue Road	Roundabout Cafe	E
2a Belle Vue Road	Ripping Yarns	E
3 Belle Vue Road	Locksmith	E
The Palace Cinema	Cinema	Sui Generis
9 High Street	Elsa's Pet Shop	E

ADDRESS	SERVICE	USE CLASS
7 High Street	Angels	Sui Generis
3-5 High Street	Pitman Blackstock and White Solicitors	E
1 High Street	Vacant (was the Fern Ticket)	Vacant
2 Dockham Road	Grindles Coaches	E
4 Dockham Road	Dean Estate Agents	E
6 Dockham Road	Cut 'N' Dry Hair Dressers	E
1 Berisford Court, Dockham Road	The Cash Exchange	E
2-3 Berisford Court, Dockham Road	NFU Mutual	E
4-5 Berisford Court, Dockham Road	Gwyn James Solicitors	E
6 Berisford Court, Dockham Road	Muzo's Café Bar and Restaurant	E
Health Centre, Dockham Road	Vacant (Was Health Centre)	Vacant
The County Store, Dockham Road	Co-operative Foodstore	E
Rugby Club, Dockham Road	Rugby Club Dockham Road	E
Cinderford Methodist Church, Belle Vue Road	Cinderford Methodist Church	F.1
Wesley Hall, Belle Vue Road	Wesley Hall	F.1
4 Belle Vue Road	Offices	F.1
6 Belle Vue Road	Offices	F.1
Library, Belle Vue Road	Library	F.1
Royal Forest Centre, Dockham Road	Royal Forest Centre	F.1

Appendix 2

7. Use Class Order

The changes amend the Use Classes Order 1987 and take effect on 1 September 2020. This is a guide to the changes in the various Use Classes and the unit types that they represent:

Use	Old Use Class	New Use Class
Shops	A1	E
Financial and Professional Services	A2	E
Food and Drink	A3	E
Business (office, research and development, light industrial process)	B1	E
Non-residential Institutions (medical or health services, creches, day nurseries and centres)	D1	E
Assembly and Leisure (indoor sport, recreation or fitness, gyms)	D2	E
Non-Residential Institutions (education, art gallery, museum, public library, public exhibition hall, places of worship, law courts)	D1	F1
Shops no larger than 280m2 (selling mostly essential goods and at least 1km from other similar shops)	A1	F2
Community Hall, outdoor sport/recreation, indoor or outdoor swimming pool, skating rink	A1	F2
Public House, wine bar, drinking establishments	A4	Sui Generis
Hot Food Takeaway	A5	Sui Generis
Cinema, Concert Hall, Bingo Hall, Dance Hall, Live Music Venue	D2	Sui Generis

Appendix 3

8. Covid-19 Statistics

Footfall Counts - Week 1

Town centre	Pre-Covid baseline footfall data June/July 2019 from 10:30-11:30 (Figures below are showing 10 minute average footfall)				Week 1 Monitoring – 8th, 10th & 11th July 2020 from 10:30-11:30								
					Footfall – 10 minute average					% Non-pavement socially distancing users from total			
	Wed	Fri	Sat	Weekly average	Wed	Fri	Sat	Weekly average	Weekly average variance from 2019 baseline +/-	Wed	Fri	Sat	Weekly average
Coleford	42	72	78	64	70.3	33	52	51.7	-12.3	36.8	0.89	4.28	13.99
Cinderford	54	60	75	63	20.3	27	30.2	25.8	-37.2	1.91	2.76	2.21	2.29
Lydney	35	48	67	50	20	34	47.3	33.8	-16.2	50.3	22.2	9.72	27.4
Newent	47	59	63	56	30.2	39	46	38.4	-17.6	7.9	5.9	5.93	6.57

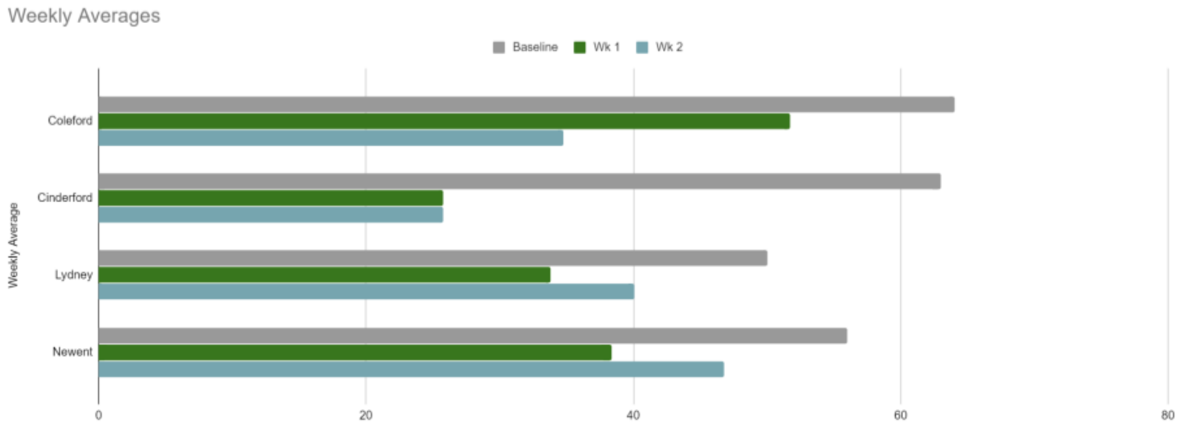
Footfall Counts - Week 2

Reopening High Streets Safely – Week 2 Monitoring Results

Town centre	Pre-Covid baseline footfall data June/July 2019 from 10:30-11:30 (Figures below are showing 10 minute average footfall)				Week 2 Monitoring – 15, 17 & 18th July 2020 from 10:30-11:30								
					Footfall – 10 minute average					% Non-pavement socially distancing users from total			
	Wed	Fri	Sat	Weekly average	Wed	Fri	Sat	Weekly average	Weekly average variance from 2019 baseline +/-	Wed	Fri	Sat	Weekly average Not recorded as barriers partially or wholly removed
Coleford	42	72	78	64	31	36	37	34.6	-29.4	0	0	0	-
Cinderford	54	60	75	63	26.8	26.8	24	25.8	-37.2	0	17.24	0	-
Lydney	35	48	67	50	32.5	41.8	46	40.1	-9.9	0	0	0	-
Newent	47	59	63	56	35	58.8	46.6	46.8	-9.2	2.03	0	0	-

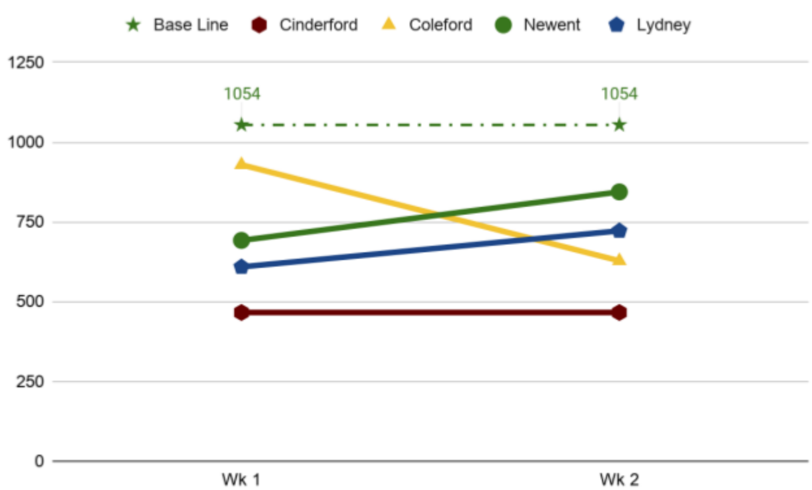
Note: Following the first week of the highway safety barrier installations, the Council received a high volume of complaints from the community and town centre traders. Only 10% of the public comments received recognised the safety benefits of creating wider pavements and passing places to allow people to socially distance along narrow pavements and pinch points. The anticipated queues outside shops and services also failed to materialise at this time. A joint decision was made by the Council Cabinet and the Town Councils to remove the barriers at the end of week 2.

Average Vs Baseline (Wk1 & 2)



The baseline in this graph is the 2019 average of the 4 week audit

Total Town Footfall Vs Baseline (Wk1 & 2)



The baseline in this graph is an average of the total footfall counts in 2019, from each town over a 4 week period

Week 1 & 2 findings:

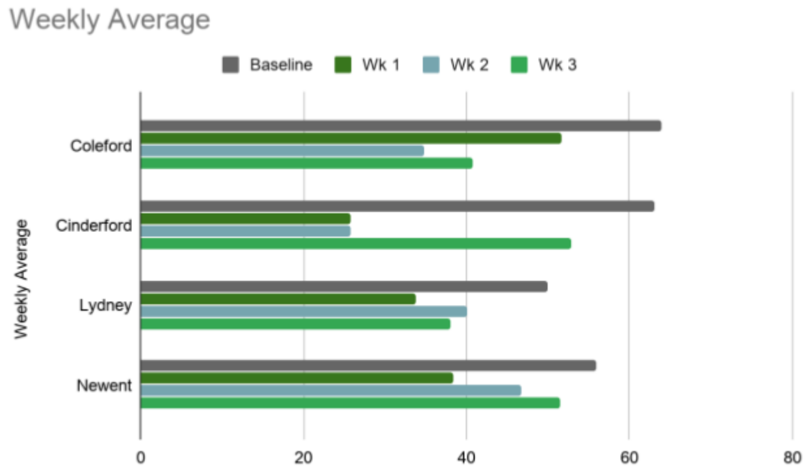
In comparison to the 2019 Baseline, foot traffic in the towns has significantly decreased. In 2019 Cinderford saw foot traffic of 1144 people over the three recorded days. In 2020 this number dropped by 678 people over the first recorded week. Cinderford has has the largest drop in footfall across the district in the first two weeks, however none of the towns have reached the averages set in 2019.

Footfall Counts - Week 3

Reopening High Streets Safely – Week 3 Monitoring Results

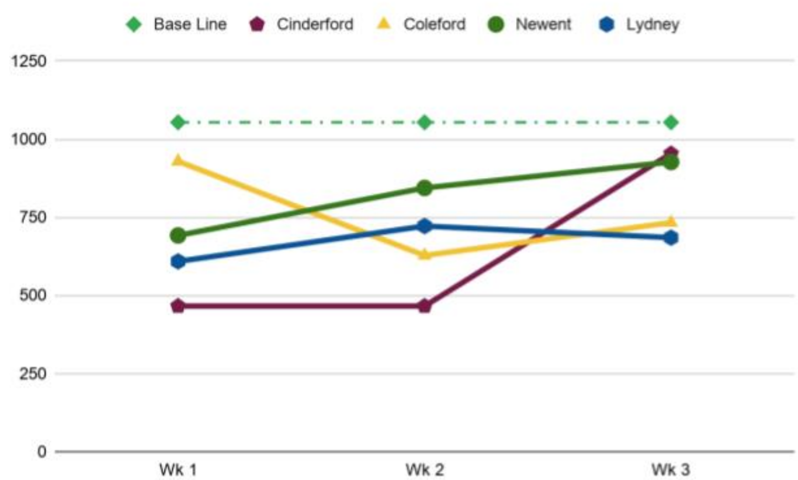
Town centre	Pre-Covid baseline footfall data June/July 2019 from 10:30-11:30 (Figures below are showing 10 minute average footfall)				Week 3 Monitoring – 22, 24, 25th July 2020 from 10:30-11:30								
					Footfall – 10 minute average					% Non-pavement socially distancing users from total			
	Wed	Fri	Sat	Weekly average	Wed	Fri	Sat	Weekly average	Weekly average variance from 2019 baseline +/-	Wed	Fri	Sat	Weekly average
Coleford	42	72	78	64	34	34.5	54	40.8	-23.2				
Cinderford	54	60	75	63	50.1	51	57.8	52.9	-10.1				
Lydney	35	48	67	50	34	38.8	41.3	38	-12				
Newent	47	59	63	56	42.8	56.2	55.5	51.5	-4.5				

Average Vs Baseline (Wk1 - Wk3)



The baseline in this graph is the 2019 average of the 4 week audit

Total Town Footfall Vs Baseline (Wk1 -Wk3)



The baseline in this graph is an average of the total footfall counts in 2019, from each town over a 4 week period

Week 3 findings:

Compulsory use of Masks whilst shopping was introduced in England on Friday 24 July 2020 and visual evidence on 24 and 25 July 2020 showed nearly 98% of shoppers were already prepared for these changes.

In week 3, Cinderford, Coleford and Newent have seen a clear increase in footfall within the towns. With Cinderford and Newent almost matching last years baseline.

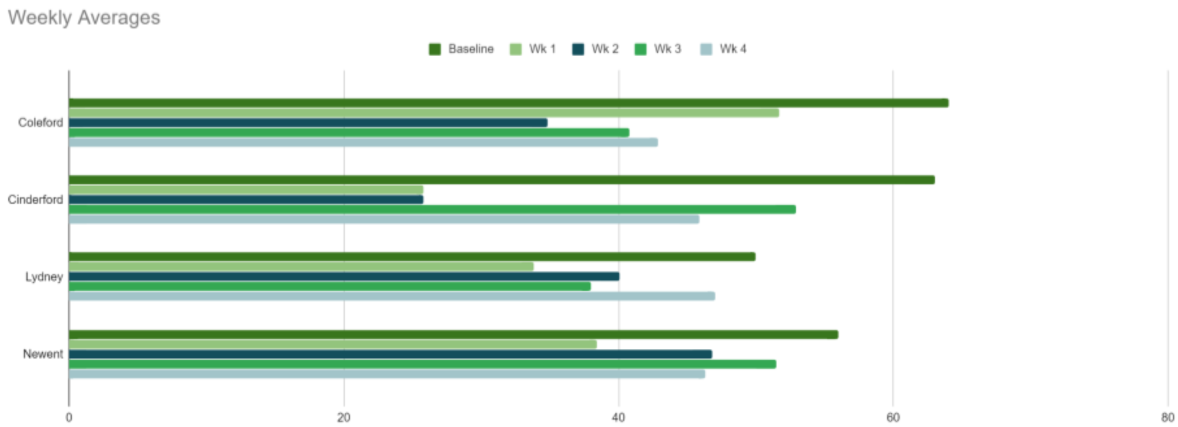
Lydney however saw a reduction of footfall, it is unclear whether this was due to environmental factors or the introduction of the regulation to wearing masks, however this may become more evident in week 4.

Footfall Counts - Week 4

Reopening High Streets Safely – Week 4 Monitoring Results

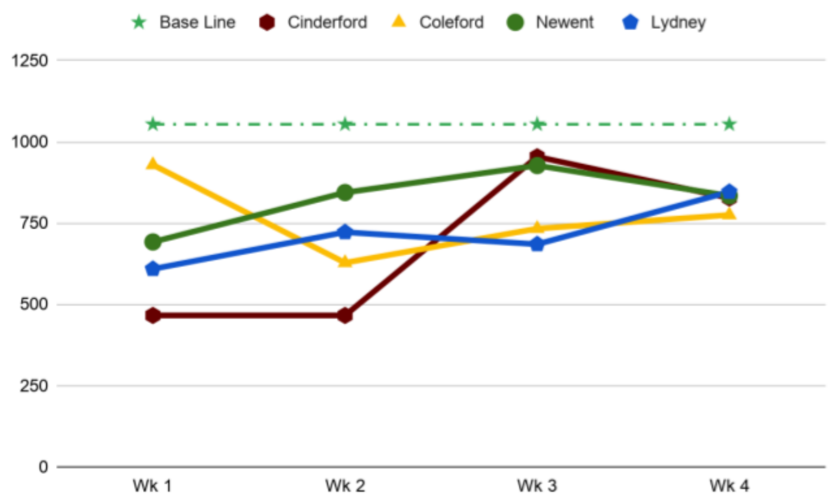
Town centre	Pre-Covid baseline footfall data June/July 2019 from 10:30-11:30 (Figures below are showing 10 minute average footfall)				Week 4 Monitoring – 29th, 31st July & 1st Aug 2020 from 10:30-11:30								
					Footfall – 10 minute average					% Non-pavement socially distancing users from total			
	Wed	Fri	Sat	Weekly average	Wed	Fri	Sat	Weekly average	Weekly average variance from 2019 baseline +/-	Wed	Fri	Sat	Weekly average Not recorded as barriers partially or wholly removed
Coleford	42	72	78	64	44	46.3	38.5	42.9	-21.1				
Cinderford	54	60	75	63	45.6	50.8	41.3	45.9	-17.1				
Lydney	35	48	67	50	44.8	44.7	51.5	47	-3.0				
Newent	47	59	63	56	39.5	54.2	45.3	46.3	-9.7				

Average Vs Baseline (Wk 1 - Wk 4)



The baseline in this graph is the 2019 average of the 4 week audit

Total Town Footfall Vs Baseline (Wk1 -Wk4)

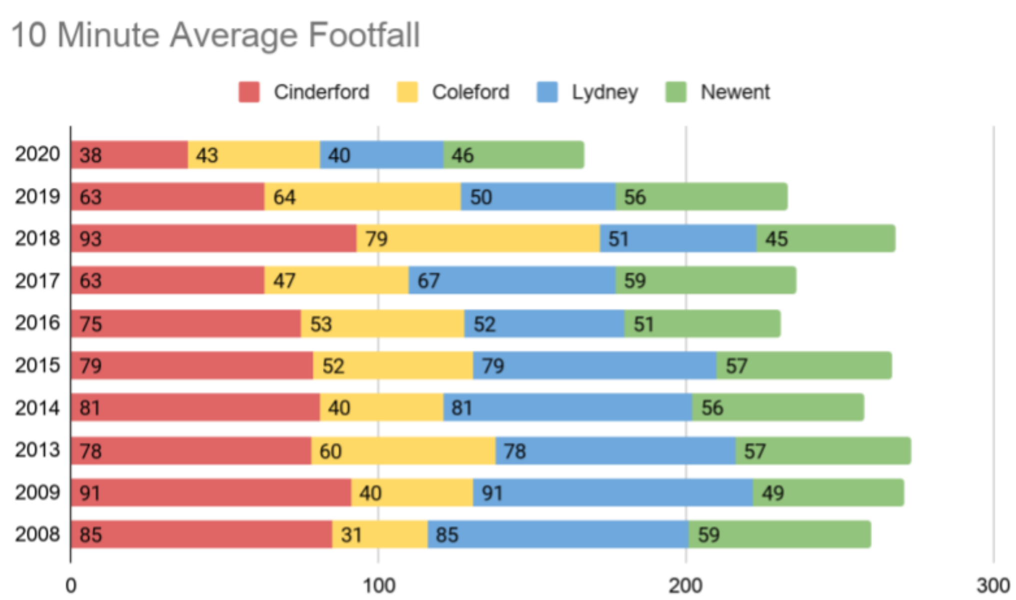


The baseline in this graph is an average of the total footfall counts in 2019, from each town over a 4 week period

Conclusion

Over the 4 weeks of July 2020, footfall has fluctuated in many of the towns during the Wednesday, Friday and Saturday counts. This has made it difficult to spot any clear trends on a town by town basis. The introduction of compulsory face coverings only came in on 24th July and this safety measure has not yet had a positive effect on footfall in all the towns.

Compared to the 2019 baseline, footfall in all 4 towns is considerably lower following lockdown. Over the 4 week survey period the towns do appear to be slowly bouncing back, with Lydney and Newent getting back to the levels of on street activity recorded last year.



The information indicates the breakdown of the average footfall counts for each recorded year. The 2020-2013 footfall counts were recorded on Wednesday, Friday and Saturday. The 2009 footfall counts were recorded on Monday and Saturday. The 2008 footfall counts were recorded on Wednesday and Saturday.

The District has seen a steady footfall count over the last 8 years. However, it is evident that **Covid-19** has had a drastic effect on the high street. Although most shops and services are now able to re-open, shoppers and visitors do not yet seem to have the confidence to return.

Government is currently reporting £3 out of every £10 is being spent online. The “stay safe, shop local” message should therefore continue to be promoted over the summer to shout about the Forest towns being open for business.

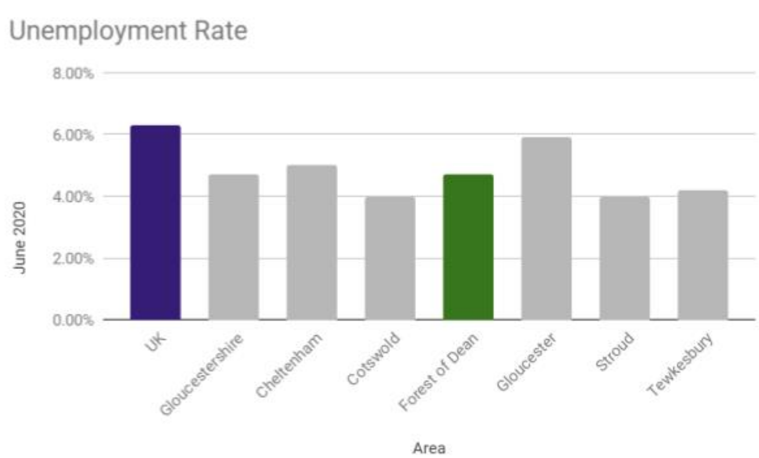
Unemployment Data

UK to Forest of Dean Comparison

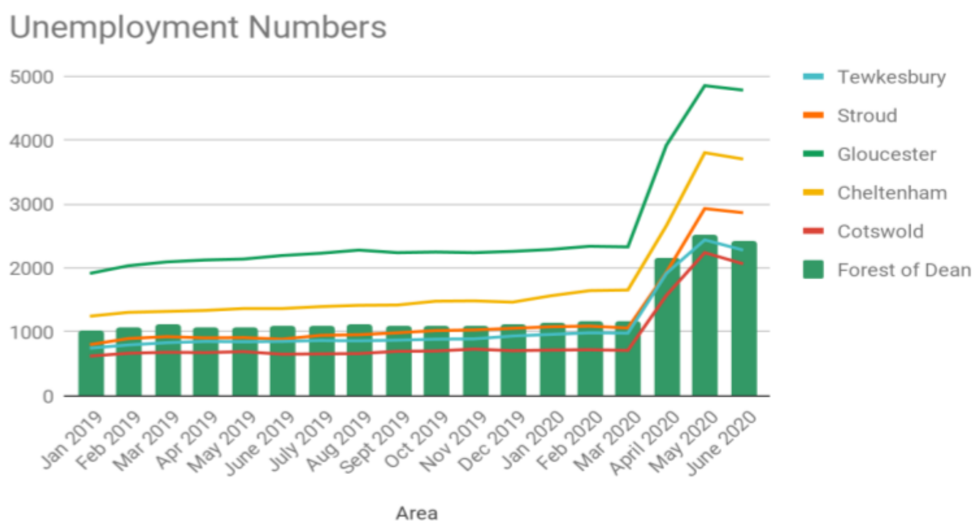
	UK	Gloucestershire	Forest Of Dean	
	Claimant Rate %	Claimant Rate %	Claimant Rate %	Number of Claimants
January 2020	2.9	2	2.2	1135
February 2020	3	2.1	2.3	1175
March 2020	3.1	2.1	2.3	1140
April 2020	5.1	3.7	4.2	2150
May 2020	6.4	4.9	4.9	2520
June 2020	6.3	4.7	4.7	2420

https://inform.gloucestershire.gov.uk/economy/unemployment/

Unemployment Rate June 2020



District Comparison



Cinderford

	Cinderford West		Cinderford East	
	Claimant rate %	County Ranking	Claimant rate %	County Ranking
Jan-20	3.1	127	3.2	128
Feb-20	3.3	129	3.4	132
Mar-20	3.2	129	3.1	128
Apr-20	5.4	132	5.6	133
May-20	6.2	126	5.9	120
Jun-20	5.8	124	5.5	118

There has been an initial spike in unemployment in Cinderford as expected due to COVID-19, however in June 2020, there was a drop in claimants. This may be due to the easing of lockdown restrictions during June which allowed various sectors to return to work eg. construction & the retail/service sector.

Coleford

	Coleford Central		Coleford East	
	Claimant rate %	County Ranking	Claimant rate %	County Ranking
Jan-20	3.5	132	3.2	128
Feb-20	3.7	133	2.9	124
Mar-20	3.4	132	2.7	122
Apr-20	6	137	5.6	133
May-20	5.9	120	5.9	120
Jun-20	5.7	121	5	107

There has been an initial spike in unemployment in Coleford as expected due to COVID-19, however in June 2020, there was a drop in claimants. This may be due to the easing of lockdown restrictions during June which allowed various sectors to return to work eg. construction & the retail/service sector.

Newent

	Newent Central		Oxenhall & Newent North East	
	Claimant rate %	County Ranking	Claimant rate %	County Ranking
Jan-20	2.8	124	1.6	77
Feb-20	3	126	1.7	82
Mar-20	3	126	1.9	93
Apr-20	4.6	118	3.5	89
May-20	5.9	120	5.2	106
Jun-20	5.2	111	5.2	111

There has been an initial spike in unemployment in Newent as expected due to COVID-19, however in June 2020, there was a drop in claimants. This may be due to the easing of lockdown restrictions during June which allowed various sectors to return to work eg. construction & the retail/service sector.

Lydney

	Lydney North		Lydney East		Alvington, Aylburton & West Lydney	
	Claimant rate %	County Ranking	Claimant rate %	County Ranking	Claimant rate %	County Ranking
Jan-20	1.2	48	4.5	142	2.4	116
Feb-20	1.1	37	4.7	142	2.2	107
Mar-20	1.1	37	4.7	142	2.2	108
Apr-20	3.4	85	7.8	144	4.4	115
May-20	3.8	49	8.5	144	5.8	117
Jun-20	3.5	48	8	141	6	126

Lydney most recently has suffered with high unemployment rates.

There has been an initial spike in unemployment in the town as expected due to COVID-19, however in June 2020, there was a drop in claimants.

However Alvington, Aylburton and West Lydney, an area of previously low unemployment, has seen an unusually high growth in claimants.

Findings:

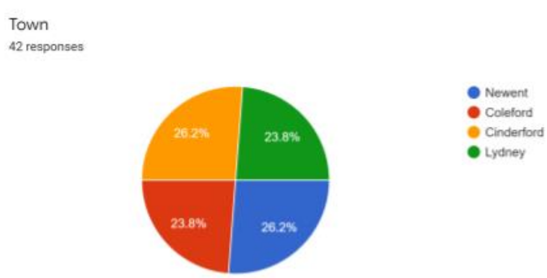
Recent years have shown some trends in high unemployment within the District, with the highest concentration being within the 4 market towns. This logically also translates on a County basis with Gloucester and Cheltenham seeing the highest rates of unemployment.

Data suggests that as lockdown eases, we will see a reduction in unemployment and universal credit claims, however many businesses warn that they would not be able to survive a second lockdown.

Reopening the High Street Survey

Introduction

Prior to 14 June 2020, FoDDC conducted a telephone survey of business across the 4 towns. 42 businesses participated in the short 5 minute survey.

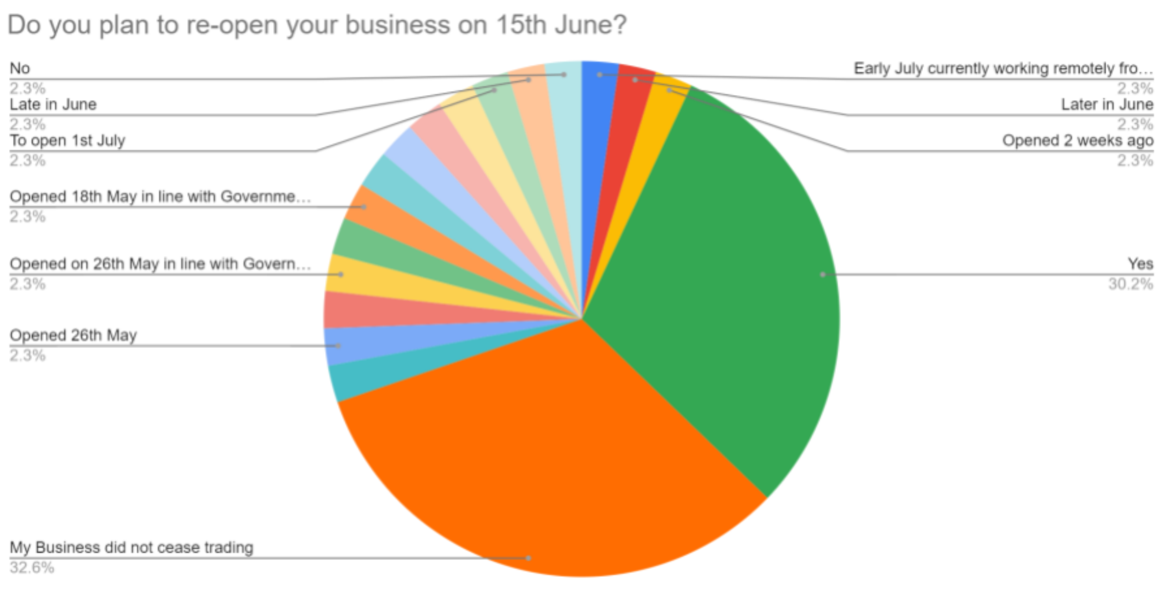


How many stores closed?

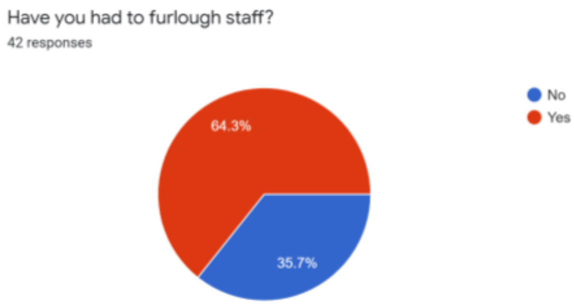
The survey showed that over 30% of the stores asked did **not** close due to Covid-19 restrictions or diversified to ensure that they were able to stay open and continue working.

The butteries Tea Rooms in Newent continued to provide takeout meals for the vulnerable and have since fully reopened following the easing of restrictions.

In addition to this My Dentist & Aston and Daniel Optician remained open for emergency appointments.



Furloughed Staff



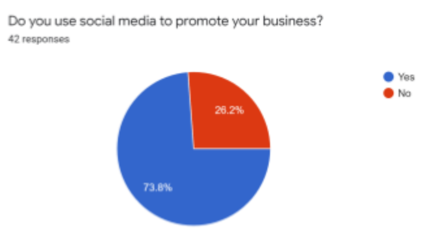
The survey conducted by FoDDC confirmed that prior to 14 June 2020 out of the 42 businesses on the High Street, across the 4 towns, 64.3% of them furloughed staff

Website

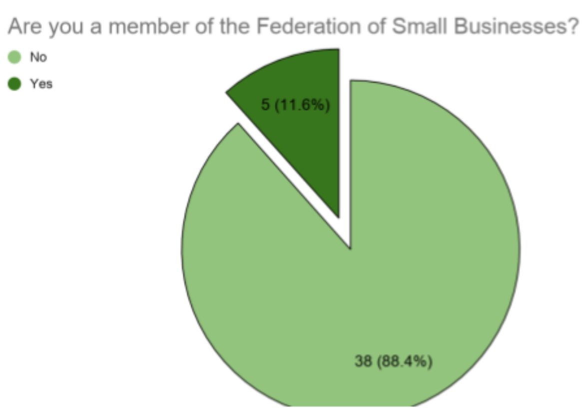
31% of the people asked did not have a website and from the 35 who did, only 22.9% of those were transactional.

Social Media

23.6% of businesses believed they would benefit from some course of social media training to assist their businesses

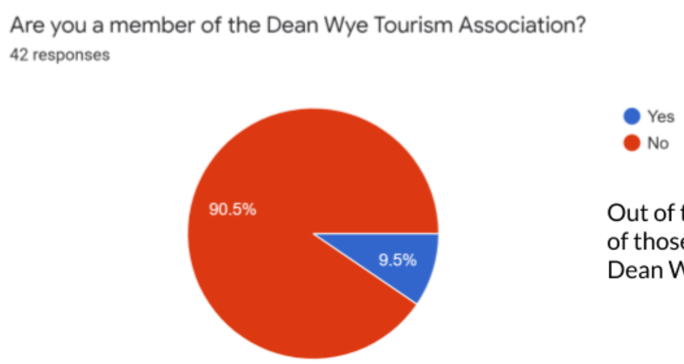


Federation of Small Businesses



Out of the 42 businesses asked only 5 of those were already members of the FSB. However, 14 of those who were not members were interested in finding out more information on how a FSB membership would benefit their business.

Dean Wye Tourism Association



Out of the 42 businesses asked only 4 of those were already members of the Dean Wye Tourism Association