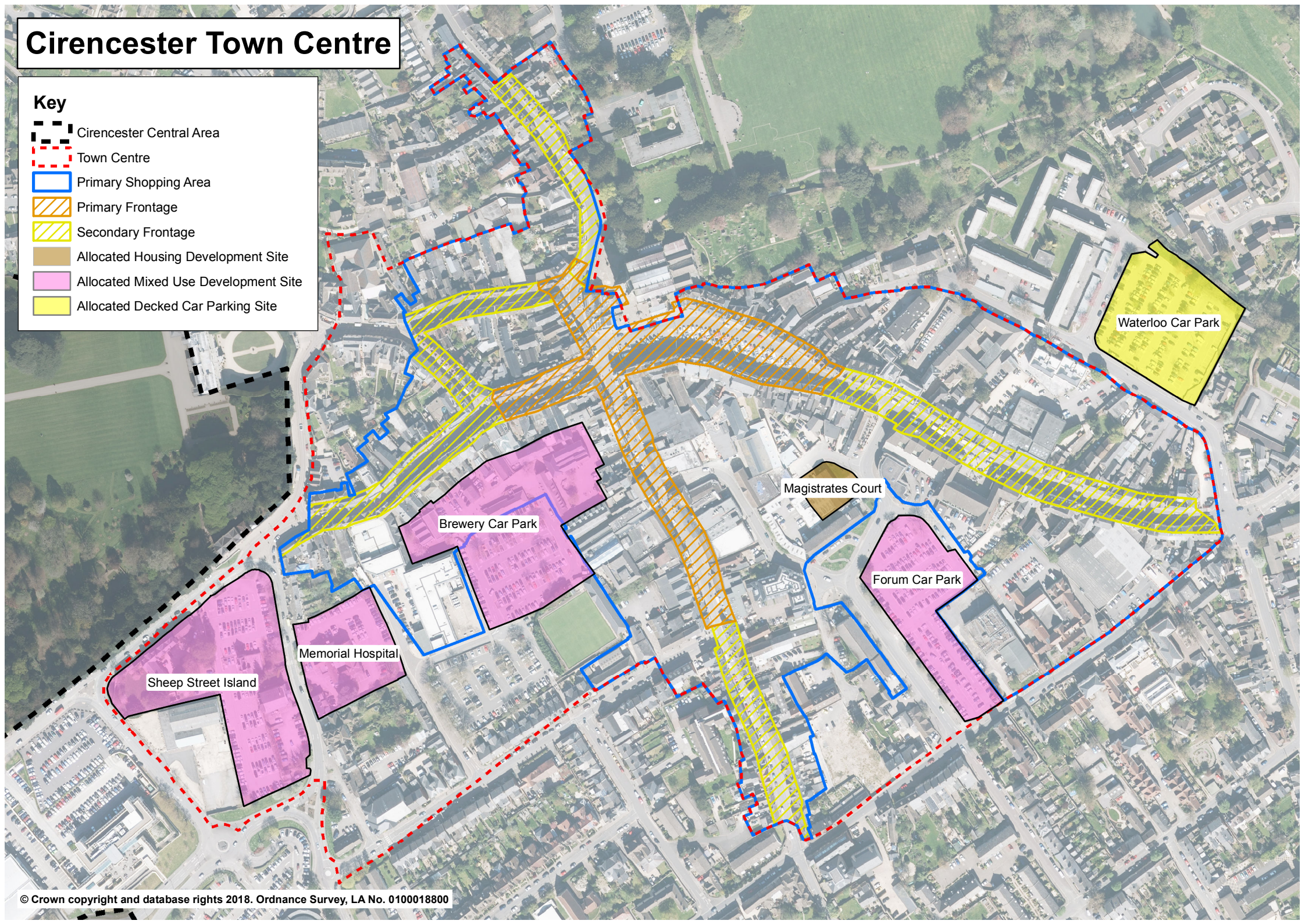


Appendix 1: Cirencester Town Centre Car Parks Plan

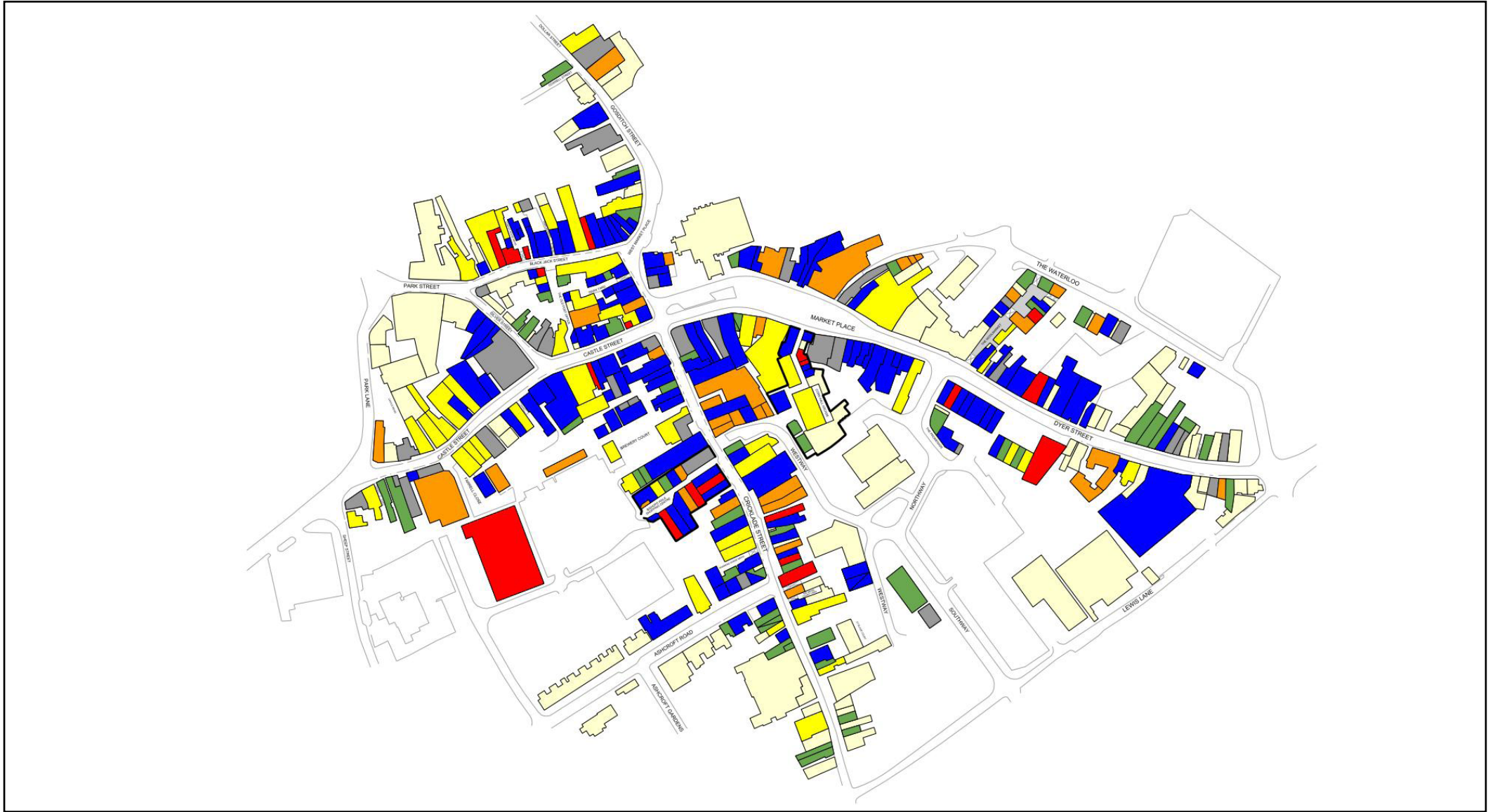
Cirencester Town Centre

Key

- Cirencester Central Area
- Town Centre
- Primary Shopping Area
- Primary Frontage
- Secondary Frontage
- Allocated Housing Development Site
- Allocated Mixed Use Development Site
- Allocated Decked Car Parking Site



Appendix 2: Cirencester Town Centre Composition Plan



- Comparison
- Convenience
- Financial & Business Services
- Leisure Service
- Retail Service
- Vacant

Cirencester town centre

Cirencester Town Centre Feasibility Study
Survey Date - July 2021

Appendix 3: In-Street Survey Results

	Total	Male	Female	18 - 34	35 - 54	55 +	ABC1	C2DE	Castle Street	Dyer Street	Cricklade Street	Market Place / West	
Q01	How did you travel to Cirencester Town Centre today?												
Car / van (as driver)	49.50%	99 57.32%	47 44.07%	52 50.00%	26 48.00%	36 50.69%	37 55.47%	76 36.51%	23 60.78%	31 50.00%	23 52.27%	23 37.29%	22
Car / van (as passenger)	19.50%	39 15.85%	13 22.03%	26 15.39%	8 25.33%	19 16.44%	12 18.25%	25 22.22%	14 21.57%	11 26.09%	12 15.91%	7 15.25%	9
Bus, minibus or coach	6.00%	12 3.66%	3 7.63%	9 1.92%	1 5.33%	4 9.59%	7 1.46%	2 15.87%	10 1.96%	1 2.17%	1 6.82%	3 11.86%	7
Motorcycle, scooter or moped	0.50%	1 0.00%	0 0.85%	1 0.00%	0 1.33%	1 0.00%	0 0.73%	1 0.00%	0 0.00%	0 0.00%	0 0.00%	0 1.70%	1
Walk	22.00%	44 17.07%	14 25.42%	30 30.77%	16 14.67%	11 23.29%	17 21.17%	29 23.81%	15 11.77%	6 21.74%	10 22.73%	10 30.51%	18
Taxi / minicab	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Bicycle	2.50%	5 6.10%	5 0.00%	0 1.92%	1 5.33%	4 0.00%	0 2.92%	4 1.59%	1 3.92%	2 0.00%	0 2.27%	1 3.39%	2
Combined (PLEASE WRITE IN)	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Other (PLEASE WRITE IN)	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Base:		200	82	118	52	75	73	137	63	51	46	44	59
Q02	Where did you park today? Those who said by car / van at Q1												
Abbey Grounds car park	5.07%	7 1.67%	1 7.69%	6 0.00%	0 9.09%	5 4.08%	2 5.94%	6 2.70%	1 0.00%	0 14.29%	5 3.33%	1 3.23%	1
Beeches car park	2.90%	4 5.00%	3 1.28%	1 5.88%	2 3.64%	2 0.00%	0 0.99%	1 8.11%	3 0.00%	0 2.86%	1 6.67%	2 3.23%	1
Brewery car park	15.94%	22 11.67%	7 19.23%	15 11.77%	4 16.36%	9 18.37%	9 14.85%	15 18.92%	7 19.05%	8 14.29%	5 16.67%	5 12.90%	4
Forum car park	13.77%	19 16.67%	10 11.54%	9 23.53%	8 10.91%	6 10.20%	5 10.89%	11 21.62%	8 16.67%	7 5.71%	2 13.33%	4 19.36%	6
Leisure Centre car park	4.35%	6 5.00%	3 3.85%	3 2.94%	1 3.64%	2 6.12%	3 1.98%	2 10.81%	4 2.38%	1 14.29%	5 0.00%	0 0.00%	0
Memorial Hospital, Sheep Street	1.45%	2 1.67%	1 1.28%	1 5.88%	2 0.00%	0 0.00%	0 1.98%	2 0.00%	0 0.00%	0 2.86%	1 0.00%	0 3.23%	1
Station / Sheep Street Island car park	2.90%	4 3.33%	2 2.56%	2 2.94%	1 0.00%	0 6.12%	3 3.96%	4 0.00%	0 4.76%	2 5.71%	2 0.00%	0 0.00%	0
Waterloo car park	2.17%	3 1.67%	1 2.56%	2 5.88%	2 1.82%	1 0.00%	0 2.97%	3 0.00%	0 2.38%	1 0.00%	0 3.33%	1 3.23%	1
Waitrose	6.52%	9 6.67%	4 6.41%	5 5.88%	2 3.64%	2 10.20%	5 8.91%	9 0.00%	0 11.91%	5 2.86%	1 6.67%	2 3.23%	1
On street	21.01%	29 28.33%	17 15.39%	12 11.77%	4 21.82%	12 26.53%	13 21.78%	22 18.92%	7 14.29%	6 25.71%	9 30.00%	9 16.13%	5
Other (PLEASE WRITE IN CAR PARK ADDRESS)	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Family member's home	1.45%	2 3.33%	2 0.00%	0 2.94%	1 1.82%	1 0.00%	0 1.98%	2 0.00%	0 2.38%	1 0.00%	0 3.33%	1 0.00%	0
St James Palace	0.73%	1 0.00%	0 1.28%	1 2.94%	1 0.00%	0 0.00%	0 0.99%	1 0.00%	0 2.38%	1 0.00%	0 0.00%	0 0.00%	0
(Don't know / can't remember)	14.49%	20 13.33%	8 15.39%	12 11.77%	4 16.36%	9 14.29%	7 15.84%	16 10.81%	4 16.67%	7 8.57%	3 10.00%	3 22.58%	7
(Dropped off)	7.25%	10 1.67%	1 11.54%	9 5.88%	2 10.91%	6 4.08%	2 6.93%	7 8.11%	3 7.14%	3 2.86%	1 6.67%	2 12.90%	4
Base:		138	60	78	34	55	49	101	37	42	35	30	31
Q03	Did you have any difficulties obtaining a car parking space today? Those who mentioned a car park at Q2												
Yes	9.09%	7 9.38%	3 8.89%	4 4.35%	1 11.11%	3 11.11%	3 7.41%	4 13.04%	3 12.00%	3 0.00%	0 26.67%	4 0.00%	0
No	90.91%	70 90.63%	29 91.11%	41 95.65%	22 88.89%	24 88.89%	24 92.59%	50 86.96%	20 88.00%	22 100.00%	22 73.33%	11 100.00%	15
Base:		77	32	45	23	27	27	54	23	25	22	15	15
Mean Score [Minutes]													
Q04	How long did your journey to Cirencester Town Centre take?												
0-5 minutes	7.50%	15 8.54%	7 6.78%	8 3.85%	2 2.67%	2 15.07%	11 8.03%	11 6.35%	4 7.84%	4 8.70%	4 6.82%	3 6.78%	4
6-10 minutes	9.00%	18 9.76%	8 8.48%	10 7.69%	4 8.00%	6 10.96%	8 9.49%	13 7.94%	5 7.84%	4 10.87%	5 4.55%	2 11.86%	7
11-15 minutes	18.50%	37 20.73%	17 16.95%	20 25.00%	13 18.67%	14 13.70%	10 14.60%	20 26.98%	17 15.69%	8 23.91%	11 15.91%	7 18.64%	11
16-20 minutes	18.50%	37 17.07%	14 19.49%	23 15.39%	8 16.00%	12 23.29%	17 21.90%	30 11.11%	7 13.73%	7 15.22%	7 25.00%	11 20.34%	12
21-30 minutes	18.00%	36 19.51%	16 16.95%	20 13.46%	7 26.67%	20 12.33%	9 17.52%	24 19.05%	12 21.57%	11 21.74%	10 9.09%	4 18.64%	11
31-60 minutes	20.00%	40 17.07%	14 22.03%	26 32.69%	17 22.67%	17 8.22%	6 18.25%	25 23.81%	15 21.57%	11 10.87%	5 25.00%	11 22.03%	13
Over 60 minutes	8.50%	17 7.32%	6 9.32%	11 1.92%	1 5.33%	4 16.44%	12 10.22%	14 4.76%	3 11.77%	6 8.70%	4 13.64%	6 1.70%	1
Mean:		26.29	24.57	27.48	26.01	26.67	26.1	26.82	25.12	29.07	23.53	30.63	22.8
Base:		200	82	118	52	75	73	137	63	51	46	44	59
Q05	Did you travel to Cirencester Town Centre directly from home, work or elsewhere?												
College	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Family member's home	5.50%	11 6.10%	5 5.09%	6 5.77%	3 5.33%	4 5.48%	4 5.84%	8 4.76%	3 7.84%	4 2.17%	1 9.09%	4 3.39%	2
Friend's home	7.00%	14 4.88%	4 8.48%	10 7.69%	4 5.33%	4 8.22%	6 7.30%	10 6.35%	4 5.88%	3 8.70%	4 4.55%	2 8.48%	5
Home	79.50%	159 76.83%	63 81.36%	96 69.23%	36 85.33%	64 80.82%	59 79.56%	109 79.37%	50 70.59%	36 86.96%	40 79.55%	35 81.36%	48
Hospital appointment	1.00%	2 1.22%	1 0.85%	1 1.92%	1 1.33%	1 0.00%	0 0.73%	1 1.59%	1 0.00%	0 0.00%	0 2.27%	1 1.70%	1
On holiday	1.00%	2 1.22%	1 0.85%	1 1.92%	1 0.00%	0 1.37%	1 1.46%	2 0.00%	0 1.96%	1 0.00%	0 2.27%	1 0.00%	0
Other medical appointment	0.50%	1 1.22%	1 0.00%	0 0.00%	0 0.00%	0 0.00%	0 1.37%	1 0.00%	0 1.96%	1 0.00%	0 0.00%	0 0.00%	0
Royal Agricultural University	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Work	5.50%	11 8.54%	7 3.39%	4 13.46%	7 2.67%	2 2.74%	2 4.38%	6 7.94%	5 11.77%	6 2.17%	1 2.27%	1 5.09%	3
Elsewhere (PLEASE WRITE IN)	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Base:		200	82	118	52	75	73	137	63	51	46	44	59
Q06	In terms of your visit to Cirencester Town Centre, do you live in Cirencester Town Centre, work in Cirencester Town Centre, or are you a visitor to the area? [MR]												
Live in the centre	24.50%	49 20.73%	17 27.12%	32 28.85%	15 25.33%	19 20.55%	15 23.36%	32 26.98%	17 21.57%	11 19.57%	9 22.73%	10 32.20%	19
Work in the centre	7.00%	14 9.76%	8 5.09%	6 13.46%	7 5.33%	4 4.11%	3 7.30%	10 6.35%	4 9.80%	5 6.52%	3 6.82%	3 5.09%	3
Visitor to the centre	71.50%	143 74.39%	61 69.49%	82 65.39%	34 72.00%	54 75.34%	55 72.26%	99 69.84%	44 68.63%	35 73.91%	34 72.73%	32 71.19%	42
Base:		200	82	118	52	75	73	137	63	51	46	44	59
Q07	Why do you choose to shop in / visit Cirencester Town Centre? [MR]												
Accessibility by public transport	1.00%	2 1.22%	1 0.85%	1 0.00%	0 0.00%	0 2.74%	2 0.73%	1 1.59%	1 0.00%	0 0.00%	0 2.27%	1 1.70%	1
Accessibility to Cirencester	4.50%	9 3.66%	3 5.09%	6 7.69%	4 4.00%	3 2.74%	2 2.92%	4 7.94%	5 5.88%	3 0.00%	0 4.55%	2 6.78%	4
Car parking prices	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Car parking provision	1.50%	3 2.44%	2 0.85%	1 3.85%	2 1.33%	1 0.00%	0 1.46%	2 1.59%	1 0.00%	0 2.17%	1 4.55%	2 0.00%	0
Choice of High Street retailers	6.50%	13 2.44%	2 9.32%	11 1.92%	1 9.33%	7 6.85%	5 6.57%	9 6.35%	4 5.88%	3 8.70%	4 9.09%	4 3.39%	2
Choice of independent / specialist shops	4.50%	9 2.44%	2 5.93%	7 3.85%	2 4.00%	3 5.48%	4 3.65%	5 6.35%	4 3.92%	2 8.70%	4 4.55%	2 1.70%	1
Choice of shops selling non-food goods	1.00%	2 0.00%	0 1.70%	2 0.00%	0 0.00%	0 2.74%	2 0.00%	0 2.00%	0 2.17%	1 2.27%	1 0.00%	0 0.00%	0
Cleanliness / COVID safety measures	0.50%	1 1.22%	1 0.00%	0 0.00%	0 1.33%	1 0.00%	0 0.73%	1 0.00%	0 0.00%	0 2.17%	1 0.00%	0 0.00%	0
Close to friends / family	14.00%	28 8.54%	7 17.80%	21 13.46%	7 12.00%	9 16.44%	12 15.33%	21 11.11%	7 13.73%	7 10.87%	5 18.18%	8 13.56%	8
Close to home	36.50%	73 35.37%	29 37.29%	44 26.92%	14 33.33%	25 46.58%	34 35.04%	48 39.68%	25 25.49%	13 47.83%	22 31.82%	14 40.68%	24
Close to work	14.00%	28 20.73%	17 9.32%	11 23.08%	12 14.67%	11 6.85%	5 14.60%	18 19.61%	10 17.39%	8 4.55%	2 12.00%	2 8.48%	8
Close to school / college	0.50%	1 0.00%	0 0.85%	1 1.92%	1 0.00%	0 0.00%	0 0.73%	1 0.00%	0 0.00%	0 0.00%	0 0.00%	0 1.70%	1
Entertainment / events	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Habit	2.00%	4 1.22%	1 2.54%	3 3.85%	2 0.00%	0 2.74%	2 2.19%	3 1.59%	1 0.00%	0 2.17%	1 4.55%	2 1.70%	1
Provision of leisure services	1.00%	2 2.44%	2 0.00%	0 0.00%	0 1.33%	1 1.37%	1 0.73%	1 1.59%	1 1.96%	1 2.17%	1 0.00%	0 0.00%	0
Provision of services (e.g. banks / financial services)	2.50%	5 1.22%	1 3.39%	4 1.92%	1 4.00%	3 1.37%	1 2.92%	4 1.59%	1 3.92%	2 0.00%	0 0.00%	0 5.09%	3
Public information, signposts, public facilities	0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0
Quality of shops selling food goods	6.00%												

	Browsing	11.50%	23	14.63%	12	9.32%	11	5.77%	3	14.67%	11	12.33%	9	13.14%	18	7.94%	5	17.65%	9	8.70%	4	11.36%	5	8.48%	5
	Café / restaurant / pub (food and beverage)	31.00%	62	30.49%	25	31.36%	37	36.54%	19	32.00%	24	26.03%	19	32.85%	45	26.98%	17	37.26%	19	28.26%	13	27.27%	12	30.51%	18
	Charity shops	4.00%	8	1.22%	1	5.93%	7	5.77%	3	4.00%	3	2.74%	2	3.65%	5	4.76%	3	1.96%	1	2.17%	1	4.55%	2	6.78%	4
	Chemist	5.00%	10	2.44%	2	6.78%	8	3.85%	2	6.67%	5	4.11%	3	3.65%	5	7.94%	5	3.92%	2	2.17%	1	4.55%	2	8.48%	5
	Clothes / shoes shopping	3.00%	6	3.66%	3	2.54%	3	0.00%	0	5.33%	4	2.74%	2	0.73%	1	7.94%	5	1.96%	1	2.17%	1	2.27%	1	5.09%	3
	Doctor / dentist / other medical service	1.50%	3	2.44%	2	0.85%	1	0.00%	0	1.33%	1	2.74%	2	1.46%	2	1.59%	1	1.96%	1	0.00%	0	4.55%	2	0.00%	0
	Electrical goods shopping	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
	Furniture / carpet	1.00%	2	1.22%	1	0.85%	1	0.00%	0	0.00%	0	2.74%	2	0.73%	1	1.59%	1	1.96%	1	0.00%	0	0.00%	0	1.70%	1
	Garden items shopping	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Jewellery / gift shops	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
	Job hunting	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Library	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
	Market	1.00%	2	2.44%	2	0.00%	0	0.00%	0	1.33%	1	1.37%	1	0.73%	1	1.59%	1	1.96%	1	2.17%	1	0.00%	0	0.00%	0
	Pet good shopping	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Public offices	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Services (e.g. hairdressers, launderette)	1.00%	2	0.00%	0	1.70%	2	0.00%	0	0.00%	0	2.74%	2	1.46%	2	0.00%	0	1.96%	1	2.17%	1	0.00%	0	0.00%	0
	Social / leisure activities	3.50%	7	1.22%	1	5.09%	6	3.85%	2	4.00%	3	2.74%	2	3.65%	5	3.18%	2	5.88%	3	4.35%	2	2.27%	1	1.70%	1
	Stationers / newsagents	5.00%	10	2.44%	2	6.78%	8	5.77%	3	5.33%	4	4.11%	3	4.38%	6	6.35%	4	1.96%	1	2.17%	1	9.09%	4	6.78%	4
	Taking a walk	4.00%	8	2.44%	2	5.09%	6	5.77%	3	5.33%	4	1.37%	1	5.84%	8	0.00%	0	0.00%	0	4.35%	2	4.55%	2	6.78%	4
	Tesco Metro Cirencester	9.00%	18	3.66%	3	12.71%	15	11.54%	6	12.00%	9	4.11%	3	10.22%	14	6.35%	4	9.80%	5	10.87%	5	13.64%	6	3.39%	2
	Visit a park	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.70%	1
	Visit specialist shops	1.00%	2	0.00%	0	1.70%	2	0.00%	0	0.00%	0	2.74%	2	0.00%	0	3.18%	2	0.00%	0	0.00%	0	2.27%	1	1.70%	1
	Visit a tourist attraction	1.50%	3	1.22%	1	1.70%	2	0.00%	0	2.67%	2	1.37%	1	0.73%	1	3.18%	2	0.00%	0	4.35%	2	2.27%	1	0.00%	0
	Waitrose Cirencester	1.50%	3	1.22%	1	1.70%	2	3.85%	2	1.33%	1	0.00%	0	1.46%	2	1.59%	1	1.96%	1	2.17%	1	0.00%	0	1.70%	1
	Work / school / college	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	The Market Garden, Dyer Street, Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	M&S Simply Food, Dyer Street, Cirencester (Town Centre)	2.00%	4	1.22%	1	2.54%	3	0.00%	0	0.00%	0	5.48%	4	2.19%	3	1.59%	1	0.00%	0	8.70%	4	0.00%	0	0.00%	0
	(No reason / no other reason)	25.00%	50	29.27%	24	22.03%	26	28.85%	15	21.33%	16	26.03%	19	26.28%	36	22.22%	14	17.65%	9	26.09%	12	27.27%	12	28.81%	17
	Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q09X	Any mention at Q08 & Q09 [MR]																								
	Food and grocery shopping (WRITE IN FULL STORE ADDRESS)	2.50%	5	3.66%	3	1.70%	2	3.85%	2	0.00%	0	4.11%	3	2.92%	4	1.59%	1	3.92%	2	0.00%	0	0.00%	0	5.09%	3
	Bank / building society / Post Office	19.50%	39	15.85%	13	22.03%	26	23.08%	12	21.33%	16	15.07%	11	17.52%	24	23.81%	15	17.65%	9	17.39%	8	20.46%	9	22.03%	13
	Browsing	33.00%	66	34.15%	28	32.20%	38	32.69%	17	33.33%	25	32.88%	24	35.04%	48	28.57%	18	35.29%	18	23.91%	11	38.64%	17	33.90%	20
	Café / restaurant / pub (food and beverage)	50.50%	101	46.34%	38	53.39%	63	48.08%	25	56.00%	42	46.58%	34	54.02%	74	42.86%	27	56.86%	29	52.17%	24	50.00%	22	44.07%	26
	Charity shops	4.50%	9	1.22%	1	6.78%	8	5.77%	3	5.33%	4	2.74%	2	4.38%	6	4.76%	3	1.96%	1	2.17%	1	6.82%	3	6.78%	4
	Chemist	7.50%	15	2.44%	2	11.02%	13	5.77%	3	8.00%	6	8.22%	6	5.11%	7	12.70%	8	5.88%	3	2.17%	1	9.09%	4	11.86%	7
	Clothes / shoes shopping	7.00%	14	9.76%	8	5.09%	6	1.92%	1	9.33%	7	8.22%	6	5.11%	7	7.84%	4	6.52%	3	6.82%	3	6.82%	3	6.78%	4
	Doctor / dentist / other medical service	4.00%	8	6.10%	5	2.54%	3	1.92%	1	2.67%	2	6.85%	5	2.19%	3	7.94%	5	5.88%	3	0.00%	0	6.82%	3	3.39%	2
	Electrical goods shopping	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
	Furniture / carpet	1.50%	3	1.22%	1	1.70%	2	0.00%	0	0.00%	0	4.11%	3	0.73%	1	3.18%	2	1.96%	1	2.17%	1	0.00%	0	1.70%	1
	Garden items shopping	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	2.17%	1	0.00%	0	0.00%	0
	Jewellery / gift shops	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
	Job hunting	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Library	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
	Market	2.50%	5	2.44%	2	2.54%	3	0.00%	0	4.00%	3	2.74%	2	2.92%	4	1.59%	1	3.92%	2	2.17%	1	0.00%	0	3.39%	2
	Pet good shopping	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
	Public offices	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	Services (e.g. hairdressers, launderette)	4.00%	8	4.88%	4	3.39%	4	0.00%	0	2.67%	2	8.22%	6	3.65%	5	4.76%	3	1.96%	1	4.35%	2	4.55%	2	5.09%	3
	Social / leisure activities	8.50%	17	6.10%	5	10.17%	12	5.77%	3	9.33%	7	9.59%	7	9.49%	13	6.35%	4	9.80%	5	17.39%	8	2.27%	1	5.09%	3
	Stationers / newsagents	8.50%	17	3.66%	3	11.86%	14	11.54%	6	8.00%	6	6.85%	5	7.30%	10	11.11%	7	3.92%	2	6.52%	3	13.64%	6	10.17%	6
	Taking a walk	4.50%	9	2.44%	2	5.93%	7	5.77%	3	6.67%	5	1.37%	1	6.57%	9	0.00%	0	0.00%	0	4.35%	2	4.55%	2	8.48%	5
	Tesco Metro Cirencester	12.00%	24	7.32%	6	15.25%	18	13.46%	7	16.00%	12	6.85%	5	12.41%	17	11.11%	7	11.77%	6	13.04%	6	13.64%	6	10.17%	6
	Visit a park	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.70%	1
	Visit specialist shops	3.00%	6	2.44%	2	3.39%	4	3.85%	2	1.33%	1	4.11%	3	2.19%	3	4.76%	3	0.00%	0	4.35%	2	4.55%	2	3.39%	2
	Visit a tourist attraction	3.00%	6	4.88%	4	1.70%	2	0.00%	0	4.00%	3	4.11%	3	2.92%	4	3.18%	2	1.96%	1	4.35%	2	6.82%	3	0.00%	0
	Waitrose Cirencester	2.00%	4	1.22%	1	2.54%	3	5.77%	3	1.33%	1	0.00%	0	2.19%	3	1.59%	1	1.96%	1	2.17%	1	0.00%	0	3.39%	2
	Work / school / college	12.00%	24	18.29%	15	7.63%	9	19.23%	10	13.33%	10	5.48%	4	13.14%	18	9.52%	6	19.61%	10	15.22%	7	4.55%	2	8.48%	5
	Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
	The Market Garden, Dyer Street, Cirencester	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	2.17%	1	0.00%	0	0.00%	0
	M&S Simply Food, Dyer Street, Cirencester (Town Centre)	2.00%	4	1.22%	1	2.54%	3	0.00%	0	0.00%	0	5.48%	4	2.19%	3	1.59%	1	0.00%	0	8.70%	4	0.00%	0	0.00%	0
	Base:		200		82		118		52		75		73		137		63		51		46		44		59

Work / School / College	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0				
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0				
No response	54.50%	109	48.78%	40	58.48%	69	32.69%	17	56.00%	42	68.49%	50	54.02%	74	55.56%	35	58.82%	30	67.39%	31	56.82%	25	38.98%	23
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Mean Score [Minutes]																								
Q25	How long do you typically spend in Cirencester Town Centre during the evening / night? Those who visit in the evening at Q22																							
Less than 1 hour	8.79%	8	11.91%	5	6.12%	3	8.57%	3	6.06%	2	13.04%	3	7.94%	5	10.71%	3	9.52%	2	20.00%	3	5.26%	1	5.56%	2
Between 1 and 2 hours	13.19%	12	16.67%	7	10.20%	5	8.57%	3	12.12%	4	21.74%	5	11.11%	7	17.86%	5	19.05%	4	13.33%	2	10.53%	2	11.11%	4
Between 2 and 3 hours	63.74%	58	59.52%	25	67.35%	33	65.71%	23	66.67%	22	56.52%	13	66.67%	42	57.14%	16	57.14%	12	60.00%	9	63.16%	12	69.44%	25
Between 3 and 4 hours	14.29%	13	11.91%	5	16.33%	8	17.14%	6	15.15%	5	8.70%	2	14.29%	9	14.29%	4	14.29%	3	6.67%	1	21.05%	4	13.89%	5
Over 4 hours	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Don't visit in the evening	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Mean:		140.11		132.86		146.33		144.86		144.55		126.52		142.38		135		135.71		122		150		145
Base:		91		42		49		35		33		23		63		28		21		15		19		36
Mean Score [Much better=2, Better=1, About the same=0, Worse=-1, Much worse=-2]																								
Q26	Comparing Cirencester Town Centre with other surrounding centres, (e.g. Cheltenham, Gloucester, or Swindon) how does it compare on the following aspects?																							
Choice of shops																								
Much better	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Better	25.00%	50	21.95%	18	27.12%	32	17.31%	9	30.67%	23	24.66%	18	25.55%	35	23.81%	15	39.22%	20	21.74%	10	27.27%	12	13.56%	8
About the same	45.50%	91	48.78%	40	43.22%	51	53.85%	28	44.00%	33	41.10%	30	46.72%	64	42.86%	27	43.14%	22	39.13%	18	43.18%	19	54.24%	32
Worse	17.50%	35	19.51%	16	16.10%	19	13.46%	7	17.33%	13	20.55%	15	16.06%	22	20.64%	13	5.88%	3	30.44%	14	13.64%	6	20.34%	12
Much worse	1.00%	2	1.22%	1	0.85%	1	0.00%	0	1.33%	1	1.37%	1	1.59%	1	1.59%	1	0.00%	0	0.00%	0	2.27%	1	1.70%	1
(Don't know)	11.00%	22	8.54%	7	12.71%	15	15.39%	8	6.67%	5	12.33%	9	10.95%	15	11.11%	7	11.77%	6	8.70%	4	13.64%	6	10.17%	6
Mean:		0.06		0		0.11		0.05		0.11		0.02		0.09		0		0.38		-0.1		0.11		-0.11
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Range of goods / services on offer																								
Much better	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	2.17%	1	0.00%	0	0.00%	0
Better	22.50%	45	19.51%	16	24.58%	29	17.31%	9	30.67%	23	17.81%	13	21.90%	30	23.81%	15	37.26%	19	17.39%	8	25.00%	11	11.86%	7
About the same	47.50%	95	50.00%	41	45.76%	54	55.77%	29	41.33%	31	47.95%	35	52.56%	72	36.51%	23	35.29%	18	47.83%	22	47.73%	21	57.63%	34
Worse	12.50%	25	15.85%	13	10.17%	12	9.62%	5	10.67%	8	16.44%	12	10.22%	14	17.46%	11	5.88%	3	17.39%	8	9.09%	4	16.95%	10
Much worse	1.00%	2	1.22%	1	0.85%	1	0.00%	0	2.67%	2	0.00%	0	0.73%	1	1.59%	1	0.00%	0	0.00%	0	2.27%	1	1.70%	1
(Don't know)	16.00%	32	13.42%	11	17.80%	21	17.31%	9	14.67%	11	16.44%	12	14.60%	20	19.05%	12	21.57%	11	15.22%	7	15.91%	7	11.86%	7
Mean:		0.11		0.01		0.18		0.09		0.17		0.05		0.12		0.08		0.4		0.05		0.14		-0.1
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Choice of independent specialist shops																								
Much better	2.00%	4	0.00%	0	3.39%	4	0.00%	0	1.33%	1	4.11%	3	1.46%	2	3.18%	2	3.92%	2	4.35%	2	0.00%	0	0.00%	0
Better	44.00%	88	47.56%	39	41.53%	49	32.69%	17	46.67%	35	49.32%	36	44.53%	61	42.86%	27	50.98%	26	39.13%	18	45.46%	20	40.68%	24
About the same	36.00%	72	34.15%	28	37.29%	44	42.31%	22	37.33%	28	30.14%	22	39.42%	54	28.57%	18	23.53%	12	41.30%	19	40.91%	18	38.98%	23
Worse	3.00%	6	2.44%	2	3.39%	4	7.69%	4	0.00%	0	2.74%	2	2.19%	3	4.76%	3	1.96%	1	6.52%	3	0.00%	0	3.39%	2
Much worse	0.50%	1	1.22%	1	0.00%	0	0.00%	0	1.33%	1	0.00%	0	0.73%	1	0.00%	0	0.00%	0	2.17%	1	0.00%	0	0.00%	0
(Don't know)	14.50%	29	14.63%	12	14.41%	17	17.31%	9	13.33%	10	13.70%	10	11.68%	16	20.64%	13	19.61%	10	6.52%	3	13.64%	6	16.95%	10
Mean:		0.51		0.5		0.52		0.3		0.54		0.63		0.5		0.56		0.71		0.4		0.53		0.45
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Quality of shops																								
Much better	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	2.17%	1	0.00%	0	0.00%	0
Better	38.50%	77	40.24%	33	37.29%	44	19.23%	10	44.00%	33	46.58%	34	40.15%	55	34.92%	22	50.98%	26	39.13%	18	38.64%	17	27.12%	16
About the same	46.50%	93	50.00%	41	44.07%	52	59.62%	31	48.00%	36	35.62%	26	45.99%	63	47.62%	30	35.29%	18	43.48%	20	43.18%	19	61.02%	36
Worse	3.00%	6	0.00%	0	5.09%	6	5.77%	3	0.00%	0	4.11%	3	2.92%	4	3.18%	2	0.00%	0	6.52%	3	2.27%	1	3.39%	2
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	11.50%	23	9.76%	8	12.71%	15	15.39%	8	8.00%	6	12.33%	9	10.95%	15	12.70%	8	13.73%	7	8.70%	4	15.91%	7	8.48%	5
Mean:		0.41		0.45		0.39		0.16		0.48		0.52		0.42		0.4		0.59		0.4		0.43		0.26
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Range of services such as banks and other financial services																								
Much better	2.50%	5	1.22%	1	3.39%	4	5.77%	3	2.67%	2	0.00%	0	1.46%	2	4.76%	3	5.88%	3	0.00%	0	0.00%	0	3.39%	2
Better	38.50%	77	40.24%	33	37.29%	44	19.23%	10	44.00%	33	46.58%	34	40.15%	55	34.92%	22	50.98%	26	39.13%	18	38.64%	17	27.12%	16
About the same	45.00%	90	51.22%	42	40.68%	48	38.46%	20	41.33%	31	53.43%	19	48.91%	63	47.62%	30	35.29%	16	52.17%	23	31.37%	24	50.85%	30
Worse	1.00%	2	1.22%	1	0.85%	1	0.00%	0	0.00%	0	2.74%	2	0.73%	1	1.59%	1	0.00%	0	2.17%	1	0.00%	0	1.70%	1
Much worse	0.50%	1	1.22%	1	0.00%	0	0.00%	0	1.33%	1	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
(Don't know)	18.50%	37	15.85%	13	20.34%	24	19.23%	10	18.67%	14	17.81%	13	18.25%	25	19.05%	12	17.65%	9	21.74%	10	20.46%	9	15.25%	9
Mean:		0.44		0.33		0.51		0.6		0.48		0.28		0.4		0.51		0.69		0.28		0.34		0.4
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Range and choice of pubs / restaurants																								
Much better	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
Better	42.00%	84	34.15%	28	47.46%	56	38.46%	20	46.67%	35	39.73%	29	40.15%	55	46.03%	29	60.78%	31	34.78%	16	43.18%	19	30.51%	18
About the same	39.00%	78	47.5																					

Mean:	-0.17	-0.18	-0.16	-0.11	-0.19	-0.18	-0.15	-0.23	-0.05	-0.17	-0.21	-0.23
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Car parking prices												
Much better	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Better	5.50%	11	8.54%	7	3.39%	4	3.85%	2	4.00%	3	8.22%	6
About the same	51.50%	103	47.56%	39	54.24%	64	44.23%	23	66.67%	50	41.10%	30
Worse	15.50%	31	20.73%	17	11.86%	14	19.23%	10	10.67%	8	17.81%	13
Much worse	4.50%	9	2.44%	2	5.93%	7	5.77%	3	4.00%	3	4.11%	3
(Don't know)	23.00%	46	20.73%	17	24.58%	29	26.92%	14	14.67%	11	28.77%	21
Mean:	-0.25	-0.22	-0.27	-0.37	-0.17	-0.25	-0.19	-0.39	-0.28	-0.27	-0.21	-0.23
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Accessibility by bus												
Much better	1.00%	2	0.00%	0	1.70%	2	0.00%	0	0.00%	0	2.74%	2
Better	6.00%	12	8.54%	7	4.24%	5	7.69%	4	2.67%	2	8.22%	6
About the same	22.50%	45	25.61%	21	20.34%	24	19.23%	10	22.67%	17	24.66%	18
Worse	2.50%	5	1.22%	1	3.39%	4	3.85%	2	2.67%	2	1.37%	1
Much worse	1.50%	3	1.22%	1	1.70%	2	0.00%	0	0.00%	0	4.11%	3
(Don't know)	66.50%	133	63.42%	52	68.64%	81	69.23%	36	72.00%	54	58.90%	43
Mean:	0.07	0.13	0.03	0.13	0	0.1	0.03	0.14	0.23	-0.07	0.33	-0.08
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Accessibility by cycling												
Much better	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0
Better	7.50%	15	12.20%	10	4.24%	5	13.46%	7	5.33%	4	5.48%	4
About the same	19.50%	39	28.05%	23	13.56%	16	25.00%	13	20.00%	15	15.07%	11
Worse	3.00%	6	4.88%	4	1.70%	2	0.00%	0	5.33%	4	2.74%	2
Much worse	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.37%	1	0.73%	1
(Don't know)	69.00%	138	54.88%	45	78.81%	93	61.54%	32	68.00%	51	75.34%	55
Mean:	0.15	0.16	0.12	0.35	0.08	0	0.13	0.2	0.14	0.15	0.14	0.14
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Walking accessibility												
Much better	1.50%	3	1.22%	1	1.70%	2	0.00%	0	2.67%	2	1.37%	1
Better	25.50%	51	24.39%	20	26.27%	31	17.31%	9	18.67%	14	38.36%	28
About the same	44.00%	88	50.00%	41	39.83%	47	40.39%	21	52.00%	39	38.36%	28
Worse	1.50%	3	1.22%	1	1.70%	2	0.00%	0	1.33%	1	2.74%	2
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	27.50%	55	23.17%	19	30.51%	36	42.31%	22	25.33%	19	19.18%	14
Mean:	0.37	0.33	0.4	0.3	0.3	0.47	0.41	0.3	0.3	0.44	0.29	0.43
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Public information / signposts / public facilities												
Much better	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0
Better	12.50%	25	12.20%	10	12.71%	15	7.69%	4	9.33%	7	19.18%	14
About the same	54.50%	109	54.88%	45	54.24%	64	48.08%	25	70.67%	53	42.47%	31
Worse	4.00%	8	7.32%	6	1.70%	2	1.92%	1	1.33%	1	8.22%	6
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	28.50%	57	25.61%	21	30.51%	36	42.31%	22	17.33%	13	30.14%	22
Mean:	0.13	0.07	0.18	0.1	0.13	0.16	0.14	0.12	0.22	0.2	0.08	0.05
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Mean Score [Much better=2, Better=1, About the same=0, Worse=-1, Much worse=-2]												
Q28 Comparing Cirencester Town Centre with other surrounding centres, how does it compare on the following aspects?												
Entertainment / events / performances												
Much better	1.00%	2	1.22%	1	0.85%	1	0.00%	0	1.33%	1	1.37%	1
Better	22.00%	44	23.17%	19	21.19%	25	11.54%	6	25.33%	19	26.03%	19
About the same	34.50%	69	32.93%	27	35.59%	42	44.23%	23	34.67%	26	27.40%	20
Worse	8.00%	16	10.98%	9	5.93%	7	9.62%	5	5.33%	4	9.59%	7
Much worse	0.50%	1	1.22%	1	0.00%	0	0.00%	0	1.33%	1	0.00%	0
(Don't know)	34.00%	68	30.49%	25	36.44%	43	34.62%	18	32.00%	24	35.62%	26
Mean:	0.23	0.18	0.27	0.03	0.29	0.3	0.31	0	0.38	0.15	0.28	0.15
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Tourist facilities / hotels												
Much better	2.00%	4	2.44%	2	1.70%	2	1.92%	1	4.00%	3	0.00%	0
Better	39.50%	79	29.27%	24	46.61%	55	38.46%	20	45.33%	34	34.25%	25
About the same	38.50%	77	46.34%	38	33.05%	39	34.62%	18	40.00%	30	39.73%	29
Worse	1.50%	3	3.66%	3	0.00%	0	1.92%	1	1.33%	1	1.37%	1
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	18.50%	37	18.29%	15	18.64%	22	23.08%	12	9.33%	7	24.66%	18
Mean:	0.52	0.37	0.61	0.53	0.57	0.44	0.54	0.47	0.56	0.46	0.38	0.61
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Day time safety												
Much better	8.50%	17	7.32%	6	9.32%	11	5.77%	3	9.33%	7	9.59%	7
Better	39.00%	78	35.37%	29	41.53%	49	34.62%	18	30.67%	23	50.69%	37
About the same	38.00%	76	43.90%	36	33.90%	40	38.46%	20	48.00%	36	27.40%	20
Worse	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.73%	1
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	14.00%	28	13.42%	11	14.41%	17	19.23%	10	12.00%	9	12.33%	9
Mean:	0.65	0.58	0.69	0.55	0.56	0.8	0.66	0.61	0.73	0.56	0.67	0.64
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Evening / night safety												
Much better	6.00%	12	6.10%	5	5.93%	7	5.77%	3	6.67%	5	5.48%	4
Better	28.00%	56	30.49%	25	26.27%	31	32.69%	17	26.67%	19	30.66%	22
About the same	31.50%	63	35.37%	29	28.81%	34	34.62%	18	37.33%	28	23.29%	17
Worse	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.73%	1
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	34.00%	68	28.05%	23	38.14%	45	25.00%	13	29.33%	22	45.21%	33
Mean:	0.6	0.59	0.6	0.56	0.57	0.68	0.58	0.63	0.71	0.43	0.52	0.67
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Layout												
Much better	1.50%	3	1.22%	1	1.70%	2	0.00%	0	1.33%	1	2.74%	2
Better	37.00%	74	39.02%	32	35.59%	42	26.92%	14	33.33%	25	47.95%	35
About the same	50.00%	100	51.22%	42	49.15%	58	55.77%	29	58.67%	44	36.99%	27
Worse	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	11.00%	22	8.54%	7	12.71%	15	17.31%	9	6.67%	5	10.96%	8
Mean:	0.44	0.45	0.44	0.33	0.39	0.58	0.4	0.56	0.41	0.38	0.51	0.47
Base:	200	82	118	52	75	73	137	63	51	46	44	59
Public art												
Much better	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Better	21.50%	43	23.17%	19	20.34%	24	21.15%	11	21.33%	16	21.92%	16
About the same	38.50%	77	41.46%	34	36.44%	43	30.77%	16	50.67%	38	31.51%	23
Worse	5.50%	11	4.88%	4	5.93%	7	3.85%	2	2.67%	2	9.59%	7
Much worse	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.37%	1	0.73%	1
(Don't know)	34.00%	68	30.49%	25	36.44%	43	44.23%	23	25.33%	19	35.62%	26
Mean:	0.23	0.26	0.2	0.31	0.25	0.15	0.21	0.27	0.44	0	0.2	0.24
Base:	200	82	118	52	75	73	137	63	51	46	44	59
General environment												
Much better	3.00%	6	6.10%	5	0.85%	1	0.00%	0	1.33%	1	6.85%	5
Better	44.50%	89	40.24%	33	47.46%	56	42.31%	22	38.67%	29	52.06%	38
About the same	39.50%	79	41.46%	34	38.14%	45	38.46%	20	52.00%	39	27.40%	20
Worse	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.37%	1	0.73%	1
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	34.00%	68	30.49%	25	36.44%	43	44.23%	23	25.33%	19	35.62%	26
Mean:	0.23	0.26	0.2	0.31	0.25	0.15	0.21	0.27	0.44	0	0.2	0.24
Base:	200	82	118	52	75	73	137	63	51	46	44	59

Worse	1.50%	3	1.22%	1	1.70%	2	0.00%	0	0.00%	0	4.11%	3	0.73%	1	3.18%	2	0.00%	0	4.35%	2	2.27%	1	0.00%	0
Much worse	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	11.50%	23	10.98%	9	11.86%	14	19.23%	10	8.00%	6	9.59%	7	10.95%	15	12.70%	8	11.77%	6	6.52%	3	20.46%	9	8.48%	5

Mean: 0.55 0.58 0.54 0.52 0.45 0.68 0.59 0.47 0.64 0.47 0.6 0.52

Base: 200 82 118 52 75 73 137 63 51 46 44 59

Q29 What type of shops or services would you like to see more of in Cirencester Town Centre? [MR]

Banks	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Better leisure facility provision	2.00%	4	3.66%	3	0.85%	1	1.92%	1	4.00%	3	0.00%	0	1.46%	2	3.18%	2	1.96%	1	2.17%	1	2.27%	1	1.70%	1
Better retail provision for children and babies	3.50%	7	4.88%	4	2.54%	3	7.69%	4	4.00%	3	0.00%	0	5.11%	7	0.00%	0	1.96%	1	2.17%	1	0.00%	0	8.48%	5
Book shop	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Building society	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Card shop	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Click and collect facilities	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.70%	1
Clothing stores	30.00%	60	14.63%	12	40.68%	48	30.77%	16	30.67%	23	28.77%	21	28.47%	39	33.33%	21	29.41%	15	21.74%	10	29.55%	13	37.29%	22
Department stores / retailers	8.50%	17	8.54%	7	8.48%	10	15.39%	8	4.00%	3	8.22%	6	8.03%	11	9.52%	6	5.88%	3	10.87%	5	6.82%	3	10.17%	6
Drinking establishments	1.50%	3	2.44%	2	0.85%	1	3.85%	2	0.00%	0	1.37%	1	2.19%	3	0.00%	0	1.96%	1	0.00%	0	2.27%	1	1.70%	1
Electrical goods	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Footwear stores	1.50%	3	1.22%	1	1.70%	2	5.77%	3	0.00%	0	0.73%	1	3.18%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.09%	3
Health food shop	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
High Street names	16.50%	33	18.29%	15	15.25%	18	23.08%	12	20.00%	15	8.22%	6	14.60%	20	20.64%	13	17.65%	9	13.04%	6	13.64%	6	20.34%	12
Household goods stores	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
Independent / specialist shops	13.50%	27	12.20%	10	14.41%	17	3.85%	2	13.33%	10	20.55%	15	15.33%	21	9.52%	6	11.77%	6	15.22%	7	20.46%	9	8.48%	5
Large supermarkets	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Larger sizes clothing store	1.00%	2	0.00%	0	1.70%	2	0.00%	0	0.00%	0	2.74%	2	0.00%	0	3.18%	2	0.00%	0	2.17%	1	2.27%	1	0.00%	0
Markets	1.00%	2	0.00%	0	1.70%	2	0.00%	0	1.33%	1	1.37%	1	1.46%	2	0.00%	0	0.00%	0	0.00%	0	4.55%	2	0.00%	0
Pharmacies	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Public amenities (e.g benches, sign posts, toilets)	5.00%	10	8.54%	7	2.54%	3	3.85%	2	6.67%	5	4.11%	3	6.57%	9	1.59%	1	5.88%	3	2.17%	1	2.27%	1	8.48%	5
Public transport facilities	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Public transport services	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Restaurants / cafes	3.50%	7	6.10%	5	1.70%	2	3.85%	2	4.00%	3	2.74%	2	4.38%	6	1.59%	1	1.96%	1	2.17%	1	4.55%	2	5.09%	3
Solicitors	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Specialist food stores	1.50%	3	0.00%	0	2.54%	3	0.00%	0	1.33%	1	2.74%	2	2.19%	3	0.00%	0	0.00%	0	2.17%	1	2.27%	1	1.70%	1
Sports shop	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Street market stalls	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Toy shops	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	2.17%	1	0.00%	0	0.00%	0
Trade in shop	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bargain shops	1.50%	3	1.22%	1	1.70%	2	0.00%	0	0.00%	0	4.11%	3	1.46%	2	1.59%	1	1.96%	1	2.17%	1	2.27%	1	0.00%	0
Pound shops	1.50%	3	1.22%	1	1.70%	2	1.92%	1	1.33%	1	1.37%	1	0.73%	1	3.18%	2	3.92%	2	0.00%	0	0.00%	0	1.70%	1
None mentioned	23.00%	46	28.05%	23	19.49%	23	19.23%	10	25.33%	19	23.29%	17	27.01%	37	14.29%	9	27.45%	14	23.91%	11	31.82%	14	11.86%	7
(Don't know)	16.50%	33	17.07%	14	16.10%	19	17.31%	9	18.67%	14	13.70%	10	13.87%	19	22.22%	14	13.73%	7	23.91%	11	13.64%	6	15.25%	9

Base: 200 82 118 52 75 73 137 63 51 46 44 59

Q30 What type of leisure facilities would you like to see more of in Cirencester Town Centre? [MR]

Art galleries	2.00%	4	2.44%	2	1.70%	2	1.92%	1	1.33%	1	2.74%	2	0.73%	1	4.76%	3	1.96%	1	0.00%	0	4.55%	2	1.70%	1
Bingo	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bowling alley	3.00%	6	4.88%	4	1.70%	2	5.77%	3	2.67%	2	1.37%	1	2.19%	3	4.76%	3	5.88%	3	2.17%	1	2.27%	1	1.70%	1
Children's activity centre	6.00%	12	6.10%	5	5.93%	7	9.62%	5	8.00%	6	1.37%	1	4.38%	6	1.96%	1	1.96%	1	2.17%	1	4.55%	2	13.56%	8
Cinema	12.00%	24	17.07%	14	8.48%	10	19.23%	10	9.33%	7	9.59%	7	10.22%	14	15.87%	10	7.84%	4	10.87%	5	15.91%	7	13.56%	8
Civic Hall / Civic spaces	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Community centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Entertainment / activities for young people	2.50%	5	4.88%	4	0.85%	1	1.92%	1	5.33%	4	0.00%	0	2.92%	4	1.59%	1	0.00%	0	6.52%	3	2.27%	1	1.70%	1
Go-karting	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	0.00%	0	1.70%	1
Golf amenities	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Guided tours / audio tours	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Health and fitness	2.50%	5	6.10%	5	0.00%	0	9.62%	5	0.00%	0	0.00%	0	1.46%	2	4.76%	3	1.96%	1	4.35%	2	2.27%	1	1.70%	1
Hotels	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ice rink	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
More exhibition / info of archaeology	2.50%	5	0.00%	0	4.24%	5	1.92%	1	1.33%	1	4.11%	3	1.46%	2	4.76%	3	0.00%	0	0.00%	0	4.55%	2	5.09%	3
Museums	0.50%	1	1.22%	1	0.00%	0	0.00%	0	1.33%	1	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Music events	7.50%	15	8.54%	7	6.78%	8	11.54%	6	8.00%	6	4.11%	3	8.76%	12	4.76%	3	7.84%	4	4.35%	2	9.09%	4	8.48%	5
Parks / gardens	0.50%	1	1.22%	1	0.00%	0	0.00%	0	1.33%	1	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Restaurants / cafes	3.00%	6	2.44%	2	3.39%	4	3.85%	2	2.67%	2	2.74%	2	4.38%	6	0.00%	0	1.96%	1	2.17%	1	4.55%	2	3.39%	2
Sports pitches	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swimming pool	1.00%	2	1.22%	1	0.85%	1	0.00%	0	1.33%	1	1.37%	1	1.46%	2	0.00%	0	0.00%	0	2.17%	1	0.00%	0	1.70%	1
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cycle paths	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
None mentioned	44.00%	88	37.81%	31	48.31%	57</																		

High street is rundown	2.50%	5	1.22%	1	3.39%	4	0.00%	0	1.33%	1	5.48%	4	2.92%	4	1.59%	1	1.96%	1	2.17%	1	0.00%	0	5.09%	3
Lack of parking	14.00%	28	13.42%	11	14.41%	17	13.46%	7	18.67%	14	9.59%	7	19.71%	27	15.9%	1	13.73%	7	19.57%	9	11.36%	5	11.86%	7
Too many charity shops	1.50%	3	1.22%	1	1.70%	2	0.00%	0	1.33%	1	2.74%	2	1.46%	2	1.59%	1	0.00%	0	4.35%	2	2.27%	1	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
None mentioned	8.50%	17	8.54%	7	8.48%	10	7.69%	4	4.00%	3	13.70%	10	8.76%	12	7.94%	5	11.77%	6	4.35%	2	11.36%	5	6.78%	4
No free toilets	5.00%	10	2.44%	2	6.78%	8	3.85%	2	5.33%	4	5.48%	4	6.57%	9	1.59%	1	3.92%	2	6.52%	3	2.27%	1	6.78%	4
Traffic	3.50%	7	6.10%	5	1.70%	2	1.92%	1	1.33%	1	6.85%	5	5.11%	7	0.00%	0	3.92%	2	2.17%	1	4.55%	2	3.39%	2
Lack of litter bins	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	2.17%	1	0.00%	0	0.00%	0
(Don't know)	6.00%	12	3.66%	3	7.63%	9	5.77%	3	6.67%	5	5.48%	4	3.65%	5	11.11%	7	1.96%	1	2.17%	1	9.09%	4	10.17%	6
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33A Have you attended Monday Charter Market in the last month?																								
Yes in the last 6 months	18.50%	37	18.29%	15	18.64%	22	3.85%	2	12.00%	9	35.62%	26	18.98%	26	17.46%	11	19.61%	10	28.26%	13	15.91%	7	11.86%	7
No, not in the last 6 months	41.50%	83	42.68%	35	40.68%	48	38.46%	20	53.33%	40	31.51%	23	46.72%	64	30.16%	19	27.45%	14	36.96%	17	50.00%	22	50.85%	30
Never	40.00%	80	39.02%	32	40.68%	48	57.69%	30	34.67%	26	32.88%	24	34.31%	47	52.38%	33	52.94%	27	34.78%	16	34.09%	15	37.29%	22
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33B Have you attended Friday Charter Market in the last month?																								
Yes in the last 6 months	23.00%	46	21.95%	18	23.73%	28	5.77%	3	16.00%	12	42.47%	31	23.36%	32	22.22%	14	19.61%	10	32.61%	15	22.73%	10	18.64%	11
No, not in the last 6 months	40.50%	81	42.68%	35	38.98%	46	38.46%	20	52.00%	39	30.14%	22	44.53%	61	31.75%	20	29.41%	15	36.96%	17	47.73%	21	47.46%	28
Never	36.50%	73	35.37%	29	37.29%	44	55.77%	29	32.00%	24	27.40%	20	32.12%	44	46.03%	29	50.98%	26	30.44%	14	29.55%	13	33.90%	20
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33C Have you attended Farmers Market in the last month?																								
Yes in the last 6 months	28.50%	57	26.83%	22	29.66%	35	9.62%	5	26.67%	20	43.84%	32	30.66%	42	23.81%	15	19.61%	10	34.78%	16	31.82%	14	28.81%	17
No, not in the last 6 months	39.00%	78	41.46%	34	37.29%	44	38.46%	20	42.67%	32	35.62%	26	43.07%	59	30.16%	19	39.22%	20	32.61%	15	43.18%	19	40.68%	24
Never	32.50%	65	31.71%	26	33.05%	39	51.92%	27	30.67%	23	20.55%	15	26.28%	36	46.03%	29	41.18%	21	32.61%	15	25.00%	11	30.51%	18
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33D Have you attended Arts & Crafts Market in the last month?																								
Yes in the last 6 months	13.50%	27	14.63%	12	12.71%	15	0.00%	0	9.33%	7	27.40%	20	12.41%	17	15.87%	10	7.84%	4	21.74%	10	15.91%	7	10.17%	6
No, not in the last 6 months	41.50%	83	40.24%	33	42.37%	50	32.69%	17	50.67%	38	38.36%	28	48.18%	66	26.98%	17	35.29%	18	36.96%	17	47.73%	21	45.76%	27
Never	45.00%	90	45.12%	37	44.92%	53	67.31%	35	40.00%	30	34.25%	25	39.42%	54	57.14%	36	56.86%	29	41.30%	19	36.36%	16	44.07%	26
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33E Have you attended Corn Hall Market in the last month?																								
Yes in the last 6 months	28.50%	57	30.49%	25	27.12%	32	9.62%	5	28.00%	21	42.47%	31	31.39%	43	22.22%	14	23.53%	12	32.61%	15	34.09%	15	25.42%	15
No, not in the last 6 months	37.00%	74	31.71%	26	40.68%	48	34.62%	18	37.33%	28	38.36%	28	40.88%	56	28.57%	18	31.37%	16	39.13%	18	36.36%	16	40.68%	24
Never	34.50%	69	37.81%	31	32.20%	38	55.77%	29	34.67%	26	19.18%	14	27.74%	38	49.21%	31	45.10%	23	28.26%	13	29.55%	13	33.90%	20
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q33F Have you attended Other market or event in the last month?																								
Yes in the last 6 months	3.50%	7	4.88%	4	2.54%	3	3.85%	2	2.67%	2	4.11%	3	3.65%	5	3.18%	2	3.92%	2	0.00%	0	4.55%	2	5.09%	3
No, not in the last 6 months	38.00%	76	37.81%	31	38.14%	45	21.15%	11	48.00%	36	39.73%	29	43.80%	60	25.40%	16	25.49%	13	45.65%	21	43.18%	19	38.98%	23
Never	58.50%	117	57.32%	47	59.32%	70	75.00%	39	49.33%	37	56.16%	41	52.56%	72	71.43%	45	70.59%	36	54.35%	25	52.27%	23	55.93%	33
Base:		200		82		118		52		75		73		137		63		51		46		44		59
Q34A What one thing do you particularly like about Monday Charter Market? Those who visited Monday Charter Market in the last 6 months																								
All on one level	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Availability of local produce	21.62%	8	26.67%	4	18.18%	4	50.00%	1	22.22%	2	19.23%	5	26.92%	7	9.09%	1	50.00%	5	7.69%	1	14.29%	1	14.29%	1
Compact / easy to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ease of parking	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Easy to get to	2.70%	1	0.00%	0	4.55%	1	0.00%	0	0.00%	0	3.85%	1	0.00%	0	9.09%	1	0.00%	0	14.29%	1	0.00%	1	0.00%	0
Everything	2.70%	1	0.00%	0	4.55%	1	0.00%	0	0.00%	0	3.85%	1	3.85%	1	0.00%	0	0.00%	0	7.69%	1	0.00%	0	0.00%	0
Freshness of food	5.41%	2	6.67%	1	4.55%	1	50.00%	1	0.00%	0	3.85%	1	7.69%	2	0.00%	0	15.39%	2	0.00%	0	0.00%	0	0.00%	0
Friendly atmosphere	10.81%	4	13.33%	2	9.09%	2	0.00%	0	33.33%	3	3.85%	1	11.54%	3	9.09%	1	10.00%	1	0.00%	0	28.57%	2	14.29%	1
Good service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Not too many children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Presence of on-site security	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Proximity of bus station	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of food	2.70%	1	0.00%	0	4.55%	1	0.00%	0	11.11%	1	0.00%	0	3.85%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	14.29%	1
Quality of non-food items	2.70%	1	0.00%	0	4.55%	1	0.00%	0	0.00%	0	3.85%	1	0.00%	0	9.09%	1	0.00%	0	7.69%	1	0.00%	0	0.00%	0
Range of food	24.32%	9	26.67%	4	22.73%	5	0.00%	0	22.22%	2	26.92%	7	15.39%	4	45.46%	5	40.00%	4	15.39%	2	28.57%	2	14.29%	1
Range of non-food items	2.70%	1	6.67%	1	0.00%	0	0.00%	0	0.00%	0	3.85%	1	3.85%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	14.29%	1
Specialist ethnic goods	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The opportunity to support local businesses	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The variety	5.41%	2	6.67%	1	4.55%	1	0.00%	0	0.00%	0	7.69%	2	7.69%	2	0.00%	0	0.00%	0	7.69%	1	0.00%	0	14.29%	1
Traditional values	10.81%	4	6.67%	1	13.64%	3	0.00%	0	0.00%	0	15.39%	4	11.54%	3	9.09%	1	10.00%	0	15.39%	2	14.29%	1	14.29%	1
Value for money	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Nothing	5.41%	2	0.00%	0	9.09%	2	0.00%	0	11.11%	1	3.85%	1	3.85%	1	9.09%	1	0.00%	0	15.39%	2	0.00%	0	0.00%	0
(Don't know)	2.70%	1	6.67%	1	0.00%	0	0.00%	0	0.00%	0	3.85%	1	3.85%	1	0.00%	0	0.00%	0	7.69%	1	0.00%	0	0.00%	0
Base:		37		15		22		2		9		26		26		11		10		13		7		7
Q34B What one thing do you particularly like about Friday Charter Market? Those who visited Friday Charter Market in the last 6 months																								
All on one level	2.17%	1	0.00%	0	3.57%	1	0.00%	0	0.0															

Q34D What one thing do you particularly like about Arts & Crafts Market?																
Those who visited Arts & Craft in the last 6 months																
All on one level	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Availability of local produce	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Compact / easy to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ease of parking	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Easy to get to	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Everything	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Freshness of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Friendly atmosphere	18.52%	5	25.00%	3	13.33%	2	0.00%	0	28.57%	2	15.00%	3	11.77%	2	30.00%	3
Good service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Not too many children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Presence of on-site security	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Proximity of bus station	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of food	3.70%	1	0.00%	0	6.67%	1	0.00%	0	14.29%	1	0.00%	0	5.88%	1	0.00%	0
Quality of non-food items	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Range of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Range of non-food items	22.22%	6	16.67%	2	26.67%	4	0.00%	0	14.29%	1	25.00%	5	29.41%	5	10.00%	1
Specialist ethnic goods	7.41%	2	8.33%	1	6.67%	1	0.00%	0	14.29%	1	5.00%	1	5.88%	1	10.00%	1
The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The opportunity to support local businesses	7.41%	2	8.33%	1	6.67%	1	0.00%	0	0.00%	0	10.00%	2	5.88%	1	10.00%	1
The variety	22.22%	6	16.67%	2	26.67%	4	0.00%	0	14.29%	1	25.00%	5	29.41%	5	10.00%	1
Traditional values	14.82%	4	16.67%	2	13.33%	2	0.00%	0	0.00%	0	20.00%	4	11.77%	2	20.00%	2
Value for money	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Nothing	3.70%	1	8.33%	1	0.00%	0	0.00%	0	14.29%	1	0.00%	0	10.00%	1	0.00%	0
Base:		27	12	15	0	7	20	17	10	4	10	7	6			

Q34E What one thing do you particularly like about Corn Hall Market?																
Those who visited Corn Hall Market in the last 6 months																
All on one level	3.51%	2	4.00%	1	3.13%	1	0.00%	0	9.52%	2	0.00%	0	4.65%	2	0.00%	0
Availability of local produce	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Compact / easy to get around	1.75%	1	0.00%	0	3.13%	1	0.00%	0	4.76%	1	0.00%	0	2.33%	1	0.00%	0
Ease of parking	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Easy to get to	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Everything	19.30%	11	24.00%	6	15.63%	5	60.00%	3	33.33%	7	3.23%	1	23.26%	10	7.14%	1
Freshness of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Friendly atmosphere	7.02%	4	8.00%	2	6.25%	2	0.00%	0	4.76%	1	9.68%	3	6.98%	3	7.14%	1
Good service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Not too many children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Presence of on-site security	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Proximity of bus station	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of non-food items	5.26%	3	4.00%	1	6.25%	2	0.00%	0	9.68%	3	2.33%	1	14.29%	2	8.33%	1
Range of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Range of non-food items	14.04%	8	8.00%	2	18.75%	6	0.00%	0	9.52%	2	19.36%	6	16.28%	7	7.14%	1
Specialist ethnic goods	5.26%	3	4.00%	1	6.25%	2	0.00%	0	9.52%	2	3.23%	1	4.65%	2	7.14%	1
The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The opportunity to support local businesses	5.26%	3	8.00%	2	3.13%	1	20.00%	1	4.76%	1	3.23%	1	2.33%	1	14.29%	2
The variety	10.53%	6	8.00%	2	12.50%	4	0.00%	0	4.76%	1	16.13%	5	9.30%	4	14.29%	2
Traditional values	15.79%	9	20.00%	5	12.50%	4	20.00%	1	0.00%	0	25.81%	8	18.61%	8	7.14%	1
Value for money	1.75%	1	0.00%	0	3.13%	1	0.00%	0	0.00%	0	3.23%	1	2.33%	1	0.00%	0
The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Nothing	7.02%	4	4.00%	1	9.38%	3	0.00%	0	14.29%	3	3.23%	1	6.98%	3	7.14%	1
(Don't know)	3.51%	2	8.00%	2	0.00%	0	0.00%	0	4.76%	1	3.23%	1	0.00%	0	14.29%	2
Base:		57	25	32	5	21	31	43	14	12	15	15	15			

Q34F What one thing do you particularly like about Other market or event?																
Those who visited Other Market or event in the last 6 months																
All on one level	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Availability of local produce	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Compact / easy to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ease of parking	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Easy to get to	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Everything	42.86%	3	50.00%	2	33.33%	1	100.00%	2	50.00%	1	0.00%	0	40.00%	2	50.00%	1
Freshness of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Friendly atmosphere	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Good service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Not too many children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Presence of on-site security	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Proximity of bus station	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Quality of non-food items	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Range of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Range of non-food items	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Specialist ethnic goods	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The opportunity to support local businesses	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The variety	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Traditional values	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Value for money	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know)	57.14%	4	50.00%	2	66.67%	2	0.00%	0	50.00%	1	100.00%	3	60.00%	3	50.00%	1
Base:		7	4	3	2	2	3	5	2	2	0	2	3			

Q35A What one thing do you particularly dislike about Monday Charter Market?																
Those who visited Monday Charter Market in the last 6 months																
Crime	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Difficult to find particular stalls	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Difficult to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Difficult to park nearby	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Empty stalls / stalls closing down	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Inability to pay by credit card	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
It is not covered	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
It is not heated	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Lack of cleanliness / COVID safety measures	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Litter	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Not big enough	5.41%	2	13.33%													

	Nothing (Don't know)	76.09%	35	72.22%	13	78.57%	22	66.67%	2	75.00%	9	77.42%	24	81.25%	26	64.29%	9	80.00%	8	60.00%	9	90.00%	9	81.82%	9	
		4.35%	2	5.56%	1	3.57%	1	0.00%	0	8.33%	1	3.23%	1	3.13%	1	7.14%	1	0.00%	0	0.00%	0	0.00%	0	18.18%	2	
	Base:		46		18		28		3		12		31		32		14		10		15		10		11	
Q35C	What one thing do you particularly dislike about Farmers Market? Those who visited Farmers Market in the last 6 months																									
	Crime	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to find particular stalls	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to park nearby	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Empty stalls / stalls closing down	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Inability to pay by credit card	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	It is not covered	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	It is not heated	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Lack of cleanliness / COVID safety measures	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Litter	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Not big enough	1.75%	1	0.00%	0	2.86%	1	0.00%	0	5.00%	1	0.00%	0	2.38%	1	0.00%	0	6.25%	1	0.00%	0	6.25%	1	0.00%	0	0.00%
	Not enough stalls	1.75%	1	0.00%	0	2.86%	1	0.00%	0	5.00%	1	0.00%	0	2.38%	1	0.00%	0	6.25%	1	0.00%	0	6.25%	1	0.00%	0	0.00%
	Poor accessibility	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor facilities e.g. toilets, seating	3.51%	2	4.55%	1	2.86%	1	20.00%	1	0.00%	0	3.13%	1	2.38%	1	6.67%	1	20.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality environment	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality of non-food items	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor range of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor value for money	3.51%	2	9.09%	2	0.00%	0	0.00%	0	0.00%	0	6.25%	2	0.00%	0	13.33%	2	0.00%	0	6.25%	1	7.14%	1	0.00%	0	0.00%
	The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Too many stalls selling the same goods	1.75%	1	4.55%	1	0.00%	0	0.00%	0	5.00%	1	0.00%	0	0.00%	0	6.67%	1	0.00%	0	0.00%	0	7.14%	1	0.00%	0	0.00%
	Too many young children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Too noisy	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Nothing (Don't know)	80.70%	46	72.73%	16	85.71%	30	60.00%	3	85.00%	17	81.25%	26	85.71%	36	66.67%	10	80.00%	8	81.25%	13	85.71%	12	76.47%	13	76.47%
		7.02%	4	9.09%	2	5.71%	2	20.00%	1	5.00%	1	6.25%	2	7.14%	3	6.67%	1	0.00%	0	0.00%	0	0.00%	0	23.53%	4	23.53%
	Base:		57		22		35		5		20		32		42		15		10		16		14		17	
Q35D	What one thing do you particularly dislike about Arts & Crafts Market? Those who visited Arts & Craft in the last 6 months																									
	Crime	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to find particular stalls	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to get around	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Difficult to park nearby	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Empty stalls / stalls closing down	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Inability to pay by credit card	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	It is not covered	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	It is not heated	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Lack of cleanliness / COVID safety measures	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Litter	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Not big enough	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Not enough stalls	3.70%	1	0.00%	0	6.7%	1	0.00%	0	14.29%	1	0.00%	0	5.88%	1	0.00%	0	10.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor accessibility	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor facilities e.g. toilets, seating	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality environment	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor quality of non-food items	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor range of food	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor service	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Poor value for money	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	The café	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Too many stalls selling the same goods	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Too many young children	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Too noisy	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	The day of the week the market is held	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
	Nothing	96.30%	26	100.00%	12	93.33%	14	0.00%	0	85.71%	6	100.00%	20	94.12%	16	100.00%	10	100.00%	4	90.00%	9	100.00%				

GEN	Gender:																									
	Male	41.00%	82	100.00%	82	0.00%	0	48.08%	25	38.67%	29	38.36%	28	41.61%	57	39.68%	25	47.06%	24	32.61%	15	45.46%	20	38.98%	23	
	Female	59.00%	118	0.00%	0	100.00%	118	51.92%	27	61.33%	46	61.64%	45	58.39%	80	60.32%	38	52.94%	27	67.39%	31	54.55%	24	61.02%	36	
	Base:		200		82		118		52		75		73		137		63		51		46		44		59	
AGE	Age Group:																									
	18 - 24 years	8.50%	17	3.66%	3	11.86%	14	32.69%	17	0.00%	0	0.00%	0	8.03%	11	9.52%	6	7.84%	4	10.87%	5	9.09%	4	6.78%	4	
	25 - 34 years	17.50%	35	26.83%	22	11.02%	13	67.31%	35	0.00%	0	0.00%	0	15.33%	21	22.22%	14	25.49%	13	6.52%	3	6.82%	3	27.12%	16	
	35 - 44 years	21.00%	42	21.95%	18	20.34%	24	0.00%	0	56.00%	42	0.00%	0	19.71%	27	23.81%	15	23.53%	12	26.09%	12	20.46%	9	15.25%	9	
	45 - 54 years	16.50%	33	13.42%	11	18.64%	22	0.00%	0	44.00%	33	0.00%	0	19.71%	27	9.52%	6	9.80%	5	8.70%	4	20.46%	9	25.42%	15	
	55 - 64 years	15.00%	30	18.29%	15	12.71%	15	0.00%	0	0.00%	0	41.10%	30	14.60%	20	15.87%	10	13.73%	7	13.04%	6	18.18%	8	15.25%	9	
	65+ years	21.50%	43	15.85%	13	25.42%	30	0.00%	0	0.00%	0	58.90%	43	22.63%	31	19.05%	12	19.61%	10	34.78%	16	25.00%	11	10.17%	6	
	Base:		200		82		118		52		75		73		137		63		51		46		44		59	
EMP	Which of the following best describes your current employment status:																									
	Full time employed	42.50%	85	67.07%	55	25.42%	30	61.54%	32	54.67%	41	16.44%	12	49.64%	68	26.98%	17	43.14%	22	47.83%	22	38.64%	17	40.68%	24	
	Part time employed	19.00%	38	6.10%	5	27.97%	33	15.39%	8	22.67%	17	17.81%	13	16.06%	22	25.40%	16	21.57%	11	10.87%	5	20.46%	9	22.03%	13	
	Unemployed	6.00%	12	7.32%	6	5.09%	6	5.77%	3	6.67%	5	5.48%	4	1.46%	2	15.87%	10	3.92%	2	2.17%	1	9.09%	4	8.48%	5	
	Retired	20.00%	40	18.29%	15	21.19%	25	0.00%	0	1.33%	1	53.43%	39	20.44%	28	19.05%	12	19.61%	10	28.26%	13	25.00%	11	10.17%	6	
	Housewife	8.50%	17	0.00%	0	14.41%	17	1.92%	1	14.67%	11	6.85%	5	8.03%	11	9.52%	6	7.84%	4	4.35%	2	4.55%	2	15.25%	9	
	Student	3.50%	7	0.00%	0	5.93%	7	13.46%	7	0.00%	0	0.00%	0	4.38%	6	1.59%	1	1.96%	1	6.52%	3	2.27%	1	3.39%	2	
	Seeking employment	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0	0.00%	0	
	Other (PLEASE WRITE IN)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
		Base:		200		82		118		52		75		73		137		63		51		46		44		59
	EMP2	On average, how often have you worked from home through 2021 when Covid-19 related restrictions have been in place? Those who said full or part time employed at EMP																								
		Never	10.57%	13	11.67%	7	9.52%	6	15.00%	6	12.07%	7	0.00%	0	6.67%	6	21.21%	7	18.18%	6	3.70%	1	7.69%	2	10.81%	4
		One day a week	4.88%	6	10.00%	6	0.00%	0	10.00%	4	1.72%	1	4.00%	1	3.33%	3	9.09%	3	3.03%	1	0.00%	0	7.69%	2	8.11%	3
Two days a week		6.50%	8	6.67%	4	6.35%	4	12.50%	5	0.00%	0	12.00%	3	8.89%	8	0.00%	0	9.09%	3	3.70%	1	3.85%	1	8.11%	3	
Three days a week		14.63%	18	10.00%	6	19.05%	12	15.00%	6	15.52%	9	12.00%	3	14.44%	13	15.15%	5	15.15%	5	0.00%	0	7.69%	2	29.73%	11	
Four days a week		8.13%	10	10.00%	6	6.35%	4	2.50%	1	12.07%	7	8.00%	2	11.11%	10	0.00%	0	12.12%	4	11.11%	3	11.54%	3	0.00%	0	
Five days a week		26.02%	32	28.33%	17	23.81%	15	25.00%	10	29.31%	17	20.00%	5	30.00%	27	15.15%	5	24.24%	8	33.33%	9	26.92%	7	21.62%	8	
(Don't know / varies)		29.27%	36	23.33%	14	34.92%	22	20.00%	8	29.31%	17	44.00%	11	25.56%	23	39.39%	13	18.18%	6	48.15%	13	34.62%	9	21.62%	8	
		Base:		123		60		63		40		58		25		90		33		33		27		26		37
EMP3		How often do you envisage working from home in 12 months' time, assuming that all Covid-19 restrictions are lifted? Those who said full or part time employed at EMP																								
	Never	14.63%	18	18.33%	11	11.11%	7	17.50%	7	17.24%	10	4.00%	1	12.22%	11	21.21%	7	18.18%	6	7.41%	2	7.69%	2	21.62%	8	
	One day a week	4.88%	6	6.67%	4	3.18%	2	10.00%	4	1.72%	1	4.00%	1	3.33%	3	9.09%	3	3.03%	3	0.00%	0	3.85%	1	5.41%	2	
	Two days a week	5.69%	7	6.67%	4	4.76%	3	7.50%	3	3.45%	2	8.00%	2	6.67%	6	3.03%	1	9.09%	3	3.70%	1	7.69%	2	2.70%	1	
	Three days a week	8.94%	11	8.33%	5	9.52%	6	7.50%	3	8.62%	5	12.00%	3	12.22%	11	0.00%	0	6.06%	2	7.41%	2	3.85%	1	16.22%	6	
	Four days a week	4.88%	6	3.33%	2	6.35%	4	2.50%	1	8.62%	5	0.00%	0	6.67%	6	0.00%	0	3.03%	1	7.41%	2	7.69%	2	2.70%	1	
	Everyday	13.82%	17	20.00%	12	7.94%	5	10.00%	4	17.24%	10	12.00%	3	17.78%	16	3.03%	1	15.15%	5	14.82%	4	19.23%	5	8.11%	3	
	(Don't know / varies)	47.15%	58	36.67%	22	57.14%	36	45.00%	18	43.10%	25	60.00%	15	41.11%	37	63.64%	21	39.39%	13	59.26%	16	50.00%	13	43.24%	16	
		Base:		123		60		63		40		58		25		90		33		33		27		26		37
	SEG	Occupation of Chief Wage Earner in HHold:																								
AB		25.00%	50	31.71%	26	20.34%	24	11.54%	6	33.33%	25	26.03%	19	36.50%	50	0.00%	0	19.61%	10	30.44%	14	27.27%	12	23.73%	14	
C1		43.50%	87	37.81%	31	47.46%	56	50.00%	26	38.67%	29	43.84%	32	63.50%	87	0.00%	0	49.02%	25	45.65%	21	45.46%	20	35.59%	21	
C2		14.50%	29	14.63%	12	14.41%	17	15.39%	8	14.67%	11	13.70%	10	0.00%	0	46.03%	29	11.77%	6	17.39%	8	6.82%	3	20.34%	12	
DE		17.00%	34	15.85%	13	17.80%	21	23.08%	12	13.33%	10	16.44%	12	0.00%	0	53.97%	34	19.61%	10	6.52%	3	20.46%	9	20.34%	12	
	Base:		200		82		118		52		75		73		137		63		51		46		44		59	
DAY	Day of interview:																									
	Monday	15.00%	30	9.76%	8	18.64%	22	13.46%	7	22.67%	17	8.22%	6	16.06%	22	12.70%	8	3.92%	2	15.22%	7	13.64%	6	25.42%	15	
	Tuesday	12.50%	25	10.98%	9	13.56%	16	17.31%	9	14.67%	11	6.85%	5	15.33%	21	6.35%	4	23.53%	12	6.52%	3	9.09%	4	10.17%	6	
	Wednesday	16.50%	33	17.07%	14	16.10%	19	19.23%	10	9.33%	7	21.92%	16	14.60%	20	20.64%	13	17.65%	9	17.39%	8	18.18%	8	13.56%	8	
	Thursday	12.50%	25	12.20%	10	12.71%	15	13.46%	7	17.33%	13	6.85%	5	10.22%	14	17.46%	11	0.00%	0	6.52%	3	15.91%	7	25.42%	15	
	Friday	15.00%	30	15.85%	13	14.41%	17	5.77%	3	6.67%	5	30.14%	22	12.41%	17	20.64%	13	7.84%	4	23.91%	11	18.18%	8	11.86%	7	
	Saturday	28.50%	57	34.15%	28	24.58%	29	30.77%	16	29.33%	22	26.03%	19	31.39%	43	22.22%	14	47.06%	24	30.44%	14	25.00%	11	13.56%	8	
		Base:		200		82		118		52		75		73		137		63		51		46		44		59
TIME	Time of Interview																									
	09.00 – 12.00	29.50%	59	32.93%	27	27.12%	32	26.92%	14	26.67%	20	34.25%	25	28.47%	39	31.75%	20	43.14%	22	34.78%	16	22.73%	10	18.64%	11	
	12.01 – 14.00	33.00%	66	31.71%	26	33.90%	40	28.85%	15	37.33%	28	31.51%	23	37.23%	51	23.81%	15	25.49%	13	58.70%	27	27.27%	12	23.73%	14	
	14.01 – 17.00	37.50%	75	35.37%																						

SN1 1	1.00%	2	2.44%	2	0.00%	0	1.92%	1	1.33%	1	0.00%	0	0.00%	0	3.18%	2	0.00%	0	0.00%	0	2.27%	1	1.70%	1
SN1 3	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN1 5	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN12 1	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0
SN15 5	1.00%	2	0.00%	0	1.70%	2	1.92%	1	1.33%	1	0.00%	0	1.46%	2	0.00%	0	1.96%	1	0.00%	0	0.00%	0	1.70%	1
SN16 0	1.00%	2	1.22%	1	0.85%	1	0.00%	0	1.33%	1	1.37%	1	1.46%	2	0.00%	0	1.96%	1	2.17%	1	0.00%	0	0.00%	0
SN16 8	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	2.17%	1	0.00%	0	0.00%	0
SN2 1	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN2 2	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN25 1	1.00%	2	1.22%	1	0.85%	1	1.92%	1	1.33%	1	0.00%	0	0.73%	1	1.59%	1	1.96%	1	0.00%	0	0.00%	0	1.70%	1
SN25 3	0.50%	1	1.22%	1	0.00%	0	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
SN3 1	1.00%	2	2.44%	2	0.00%	0	1.92%	1	1.33%	1	0.00%	0	1.46%	2	0.00%	0	3.92%	2	0.00%	0	0.00%	0	0.00%	0
SN3 2	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN3 4	0.50%	1	1.22%	1	0.00%	0	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	0.00%	0	1.70%	1
SN4 2	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
SN4 7	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.73%	1	0.00%	0	0.00%	0	0.00%	0	2.27%	1	0.00%	0
SN5 4	1.00%	2	0.00%	0	1.70%	2	1.92%	1	0.00%	0	1.37%	1	1.46%	2	0.00%	0	1.96%	1	0.00%	0	0.00%	0	1.70%	1
SN6 0	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.00%	0	1.59%	1	0.00%	0	2.17%	1	0.00%	0	0.00%	0
SN6 6	2.00%	4	3.66%	3	0.85%	1	1.92%	1	0.00%	0	4.11%	3	2.92%	4	0.00%	0	1.96%	1	2.17%	1	2.27%	1	1.70%	1
SN7 1	0.50%	1	0.00%	0	0.85%	1	0.00%	0	1.33%	1	0.00%	0	0.00%	0	1.59%	1	1.96%	1	0.00%	0	0.00%	0	0.00%	0
TR6 0	0.50%	1	0.00%	0	0.85%	1	1.92%	1	0.00%	0	0.00%	0	0.00%	0	1.59%	1	0.00%	0	0.00%	0	2.27%	1	0.00%	0
WR14 8	0.50%	1	0.00%	0	0.85%	1	0.00%	0	0.00%	0	1.37%	1	0.73%	1	0.00%	0	1.96%	1	0.00%	0	0.00%	0	0.00%	0
Base:		200		82		118		52		75		73		137		63		51		46		44		59

Appendix 4: Business Occupier Survey Results

Grow	53.85%	21	45.00%	9	50.00%	1	100.00%	1	100.00%	1	0.00%	0	60.00%	6	75.00%	3
Contract	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1
Stay the same	23.08%	9	20.00%	4	50.00%	1	0.00%	0	0.00%	0	100.00%	1	30.00%	3	0.00%	0
Don't know	12.82%	5	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Base: 39 20 2 1 1 1 10 4

Q23 Over the last 12 months has your turnover been:

Increasing	28.21%	11	20.00%	4	50.00%	1	0.00%	0	0.00%	0	0.00%	0	60.00%	6	0.00%	0
Static	25.64%	10	15.00%	3	0.00%	0	0.00%	0	100.00%	1	100.00%	1	30.00%	3	50.00%	2
Decreasing	41.03%	16	55.00%	11	50.00%	1	100.00%	1	0.00%	0	0.00%	0	10.00%	1	50.00%	2
(Not answered)	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Base: 39 20 2 1 1 1 10 4

Q24 Is your business part of a:

International or national multiple chain	17.95%	7	20.00%	4	100.00%	2	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Part of a regional multiple chain	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Franchise	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
An independent / individual business	79.49%	31	75.00%	15	0.00%	0	100.00%	1	100.00%	1	100.00%	1	90.00%	9	100.00%	4

Base: 39 20 2 1 1 1 10 4

Q25 Is your turnover:
If part of a chain at Q24

Above average for similar stores	50.00%	4	60.00%	3	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Average for similar stores	12.50%	1	20.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Below average for similar stores	25.00%	2	20.00%	1	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Don't know	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0

Base: 8 5 2 0 0 0 1 0

Q26 As a business do you offer any of the following: [MR]

Cash only payment	64.10%	25	75.00%	15	50.00%	1	100.00%	1	100.00%	1	100.00%	1	20.00%	2	100.00%	4
Chip and pin payment	66.67%	26	90.00%	18	100.00%	2	100.00%	1	100.00%	1	0.00%	0	20.00%	2	50.00%	2
Contactless payment	64.10%	25	80.00%	16	100.00%	2	100.00%	1	100.00%	1	0.00%	0	20.00%	2	75.00%	3
Other type of payment	17.95%	7	10.00%	2	50.00%	1	0.00%	0	0.00%	0	100.00%	1	30.00%	3	0.00%	0
Bank transfer	12.82%	5	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	40.00%	4	0.00%	0
Cheque	12.82%	5	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
BACS	10.26%	4	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
PayPal	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0

Base: 39 20 2 1 1 1 10 4

Q27 Do you provide customers with the option for online shopping through your website or other sales platform?

Yes	43.59%	17	60.00%	12	100.00%	2	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0
No	56.41%	22	40.00%	8	0.00%	0	100.00%	1	100.00%	1	100.00%	1	70.00%	7	100.00%	4

Base: 39 20 2 1 1 1 10 4

Q28 Do you have any plans to provide customers with the option for online shopping through your website or other sales platform?
If not currently selling via internet at Q27

Yes	4.55%	1	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0
No	90.91%	20	87.50%	7	0.00%	0	100.00%	1	0.00%	0	100.00%	1	100.00%	7	100.00%	4
(Not answered)	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Base: 22 8 0 1 1 1 7 4

Q29 Do you offer click and collect?
If currently selling via internet at Q27

Yes	64.71%	11	66.67%	8	100.00%	2	0.00%	0	0.00%	0	0.00%	0	33.33%	1	0.00%	0
No / Not applicable	29.41%	5	25.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	66.67%	2	0.00%	0
(Not answered)	5.88%	1	8.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Base: 17 12 2 0 0 0 3 0

Mean score (%):

Q30 What percentage of your business's total sales are made through the internet? [MR]
If currently selling via internet at Q27

1%	17.65%	3	16.67%	2	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
5%	5.88%	1	8.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
10%	5.88%	1	0.00%	0	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
15%	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
20%	17.65%	3	25.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
25%	11.77%	2	16.67%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
30%	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
50%	11.77%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	66.67%	2	0.00%	0
75%	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
95%	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
100%	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	29.41%	5	33.33%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	33.33%	1	0.00%	0

Mean: 20 20 0 0 0 0 0 0

Base: 17 12 2 0 0 0 3 0

Mean score [Increased=1, Stayed the same=0, Decreased=-1]

Q31 In the last three years have your internet sales:
If currently selling via internet at Q27

Increased	82.35%	14	75.00%	9	100.00%	2	0.00%	0	0.00%	0	0.00%	0	100.00%	3	0.00%	0
Stayed the same	5.88%	1	8.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Decreased	5.88%	1	8.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	5.88%	1	8.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Mean: 0.76 0.67 1 0 0 0 1 0

Base: 17 12 2 0 0 0 3 0

Q33 Why does your business not provide online shopping or internet sales? [MR]
If not currently selling via internet at Q27

We offer a service - cannot do this online	45.46%	10	0.00%	0	0.00%	0	100.00%	1	100.00%	1	100.00%	1	71.43%	5	50.00%	2
My shop requires the ability to browse in person	9.09%	2	25.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
I prefer to provide a personal service	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
My website generates enquiries	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Do not feel the need to provide this service	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Sales aren't possible online	4.55%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	14.29%	1	0.00%	0
Doesn't fit with our customer profile	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
We are a charity shop	4.55%	1	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	18.18%	4	12.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	14.29%	1	50.00%	2

Base: 22 8 0 1 1 1 7 4

Mean score [Employees]

Q34A Including yourself, how many full-time staff (30 hours +) do you currently employ?

1	25.64%	10	45.00%	9	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1
2 to 5	43.59%	17	35.00%	7	50.00%	1	100.00%	1	100.00%	1	100.00%	1	50.00%	5	25.00%	1
6 to 10	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
11 to 20	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
21 to 60	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
None	15.39%	6	15.00%	3	50.00%	1	0.00%	0	0.00%	0	0.00%	0	10.00%	1	25.00%	1

Mean: 4.51 1.7 1 5 3 2 11.6 3.5

Base: 39 20 2 1 1 1 10 4

Mean score [Employees]

Q34B Including yourself, how many part-time staff (less than 30 hours) do you currently employ?

1	15.39%	6	15.00%	3	0.00%	0	0.00%	0	0.00%	0	100.00%	1	10.00%	1	25.00%	1
2 to 5	41.03%	16	40.00%	8	50.00%	1	100.00%	1	100.00%	1	0.00%	0	50.00%	5	0.00%	0
6 to 10	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
11 to 20	10.26%	4	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0
21 to 60	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
None	28.21%	11	30.00%	6	50.00%	1	0.00%	0	0.00%	0	0.00%	0	10.00%	1	75.00%	3

Mean: 3.23 2.6 1.5 2 5 1 6.2 0.25

Base: 39 20 2 1 1 1 10 4

Q35 Do you find it difficult to recruit permanent/temporary staff?

Yes	38.46%	15	35.00%	7	50.00%	1	100.00%	1	0.00%	0	100.00%	1	30.00%	3	50.00%	2
No	61.54%	24	65.00%	13	50.00%	1	0.00%	0	100.00%	1	0.00%	0	70.00%	7	50.00%	2

Base: 39 20 2 1 1 1 10 4

Q36 What percentage of staff do you employ who live in and around the Cirencester area?

Less than 50%	17.95%	7	15.00%	3	50.00%	1	0.00%	0	0.00%	0	100.00%	1	10.00%	1	25.00%	1
Around 50%	15.39%	6	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
More than 50%	58.97%	23	60.00%	12	50.00%	1	100.00%	1	100.00%	1	0.00%	0	70.00%	7	25.00%	1
(Not answered)	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1

Base: 39 20 2 1 1 1 10 4

Mean score [Strongly agree=2, Slightly agree=1, Neither agree nor disagree=0, Slightly disagree=-1, Strongly disagree=-2]

Q37A To what extent would you agree or disagree: We consider the environmental impact of our buying decisions ?

Strongly agree	46.15%	18	40.00%	8	100.00%	2	0.00%	0	100.00%	1	0.00%	0	70.00%	7	0.00%	0
Slightly agree	20.51%	8	30.00%	6	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0	25.00%	1
Neither agree nor disagree	15.39%	6	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	50.00%	2
Slightly disagree	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Strongly disagree	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	25.00%	1

Mean: 1.08 0.95 2 1 2 0 1.3 0.33

Base: 39 20 2 1 1 1 10 4

Mean score [Strongly agree=2, Slightly agree=1, Neither agree nor disagree=0, Slightly disagree=-1, Strongly disagree=-2]

Q37B To what extent would you agree or disagree: We actively work to reduce company waste?

Strongly agree	53.85%	21	45.00%	9	100.00%	2	0.00%	0	100.00%	1	0.00%	0	80.00%	8	25.00%	1
Slightly agree	33.33%	13	35.00%	7	0.00%	0	100.00%	1	0.00%	0	100.00%	1	10.00%	1	75.00%	3
Neither agree nor disagree	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Slightly disagree	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Strongly disagree	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

Mean: 1.37 1.21 2 1 2 1 1.6 1.25

Base: 39 20 2 1 1 1 10 4

Mean score [Strongly agree=2, Slightly agree=1, Neither agree nor disagree=0, Slightly disagree=-1, Strongly disagree=-2]

Q37C To what extent would you agree or disagree: We actively try to improve our energy efficiency?

Strongly agree	51.28%	20	40.00%	8	100.00%	2	0.00%	0	100.00%	1	0.00%	0	80.00%	8	25.00%	1
Slightly agree	28.21%	11	35.00%	7	0.00%	0	0.00%	0	0.00%	0	100.00%	1	10.00%	1	50.00%	2
Neither agree nor disagree	12.82%	5	20.00%	4	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Slightly disagree	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Strongly disagree	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1

Mean: 1.32 1.21 2 0 2 1 1.5 1.33

Base: 39 20 2 1 1 1 10 4

Mean score [Strongly agree=2, Slightly agree=1, Neither agree nor disagree=0, Slightly disagree=-1, Strongly disagree=-2]

Q37D To what extent would you agree or disagree: We actively try to reduce work-related car emissions?

Strongly agree	28.21%	11	30.00%	6	50.00%	1	0.00%	0	0.00%	0	100.00%	1	30.00%	3	0.00%	0
Slightly agree	23.08%	9	30.00%	6	0.00%	0	0.00%	0	100.00%	1	0.00%	0	20.00%	2	0.00%	0
Neither agree nor disagree	33.33%	13	25.00%	5	50.00%	1	0.00%	0	0.00%	0	0.00%	0	40.00%	4	75.00%	3
Slightly disagree	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Strongly disagree	7.69%	3	5.00%	1	0.00%	0	100.00%	1	0.00%	0	0.00%	0	10.00%	1	0.00%	0

(Not answered)	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1
Mean:		0.65		0.79		1		-2		1		2		0.6		0
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38A How do you rate the Multiple (chain) stores within the town, compared with competing towns?

Very good	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Fairly good	20.51%	8	20.00%	4	100.00%	2	0.00%	0	0.00%	0	100.00%	1	0.00%	0	25.00%	1
Neither	20.51%	8	20.00%	4	0.00%	0	0.00%	0	100.00%	1	0.00%	0	10.00%	1	50.00%	2
Fairly poor	33.33%	13	30.00%	6	0.00%	0	100.00%	1	0.00%	0	0.00%	0	50.00%	5	25.00%	1
Poor	20.51%	8	30.00%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Mean:		-0.57		-0.7		1		-1		0		1		-1.13		0
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38B How do you rate the Independent shops within the town, compared with competing towns?

Very good	20.51%	8	30.00%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Fairly good	51.28%	20	40.00%	8	100.00%	2	100.00%	1	100.00%	1	0.00%	0	50.00%	5	75.00%	3
Neither	15.39%	6	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	25.00%	1
Fairly poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Poor	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0
Mean:		0.94		0.9		1		1		1		0		1.13		0.75
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38C How do you rate the Specialist shops within the town, compared with competing towns?

Very good	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Fairly good	48.72%	19	50.00%	10	50.00%	1	0.00%	0	0.00%	0	0.00%	0	50.00%	5	75.00%	3
Neither	33.33%	13	30.00%	6	50.00%	1	100.00%	1	100.00%	1	0.00%	0	30.00%	3	25.00%	1
Fairly poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Poor	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0
Mean:		0.58		0.6		0.5		0		0		0		0.63		0.75
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38D How do you rate the Clothes/fashion shops within the town, compared with competing towns?

Very good	10.26%	4	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Fairly good	17.95%	7	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	50.00%	2
Neither	10.26%	4	5.00%	1	50.00%	1	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Fairly poor	38.46%	15	30.00%	6	50.00%	1	100.00%	1	100.00%	1	100.00%	1	30.00%	3	50.00%	2
Poor	17.95%	7	25.00%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Mean:		-0.38		-0.2		-0.5		-1		-1		-1		-0.75		0
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38E How do you rate the range of shops within the town, compared with competing towns?

Very good	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Fairly good	28.21%	11	35.00%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	75.00%	3
Neither	15.39%	6	10.00%	2	50.00%	1	100.00%	1	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Fairly poor	35.90%	14	35.00%	7	50.00%	1	0.00%	0	100.00%	1	0.00%	0	40.00%	4	25.00%	1
Poor	10.26%	4	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0
Mean:		-0.25		-0.2		-0.5		0		-1		0		-0.63		0.5
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38F How do you rate the prices within the town, compared with competing towns?

Very good	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0
Fairly good	25.64%	10	25.00%	5	100.00%	2	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
Neither	38.46%	15	35.00%	7	0.00%	0	0.00%	0	100.00%	1	0.00%	0	50.00%	5	50.00%	2
Fairly poor	12.82%	5	10.00%	2	0.00%	0	100.00%	1	0.00%	0	0.00%	0	10.00%	1	25.00%	1
Poor	10.26%	4	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Mean:		0.08		-0.05		1		-1		0		2		0.13		0
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38G How do you rate the access by car within the town, compared with competing towns?

Very good	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0	0.00%	0
Fairly good	38.46%	15	30.00%	6	100.00%	2	100.00%	1	100.00%	1	0.00%	0	30.00%	3	50.00%	2
Neither	17.95%	7	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
Fairly poor	23.08%	9	30.00%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
Poor	10.26%	4	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0
Mean:		0		-0.4		1		1		1		0		0.38		0.25
Base:		39		20		2		1		1		1		10		4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38H	How do you rate the car parking within the town, compared with competing towns?																
Very good	5.13%	2	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0	10.00%	1	0.00%	0	
Fairly good	25.64%	10	30.00%	6	100.00%	2	0.00%	0	100.00%	1	0.00%	0	0.00%	0	25.00%	1	
Neither	15.39%	6	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	50.00%	2	
Fairly poor	17.95%	7	25.00%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Poor	28.21%	11	30.00%	6	0.00%	0	0.00%	0	0.00%	0	100.00%	1	30.00%	3	25.00%	1	
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Mean:			-0.42		-0.58		1		2		1		-2		-0.75		-0.25
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38I	How do you rate the access by public transport within the town, compared with competing towns?																
Very good	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly good	28.21%	11	30.00%	6	50.00%	1	0.00%	0	100.00%	1	100.00%	1	20.00%	2	0.00%	0	
Neither	33.33%	13	35.00%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	100.00%	4	
Fairly poor	23.08%	9	30.00%	6	50.00%	1	100.00%	1	0.00%	0	0.00%	0	10.00%	1	0.00%	0	
Poor	10.26%	4	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0	
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Mean:			-0.16		-0.1		0		-1		1		1		-0.63		0
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38J	How do you rate the access by bicycle within the town, compared with competing towns?																
Very good	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly good	35.90%	14	35.00%	7	50.00%	1	100.00%	1	100.00%	1	100.00%	1	20.00%	2	25.00%	1	
Neither	43.59%	17	50.00%	10	50.00%	1	0.00%	0	0.00%	0	0.00%	0	30.00%	3	75.00%	3	
Fairly poor	10.26%	4	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0	
Poor	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Mean:			0.16		0.2		0.5		1		1		1		-0.38		0.25
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38K	How do you rate the secure parking for bicycles within the town, compared with competing towns?																
Very good	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly good	12.82%	5	15.00%	3	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1	
Neither	51.28%	20	55.00%	11	0.00%	0	100.00%	1	100.00%	1	0.00%	0	40.00%	4	75.00%	3	
Fairly poor	15.39%	6	20.00%	4	50.00%	1	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0	
Poor	12.82%	5	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0	
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0	
Mean:			-0.31		-0.25		0		0		0		0		-0.88		0.25
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38L	How do you rate the signage for facilities and parking within the town, compared with competing towns?																
Very good	5.13%	2	5.00%	1	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly good	30.77%	12	30.00%	6	50.00%	1	0.00%	0	100.00%	1	0.00%	0	20.00%	2	50.00%	2	
Neither	25.64%	10	20.00%	4	0.00%	0	0.00%	0	0.00%	0	100.00%	1	40.00%	4	25.00%	1	
Fairly poor	20.51%	8	30.00%	6	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1	
Poor	10.26%	4	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0	
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0	
Mean:			0		-0.2		0		2		1		0		0		0.25
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38M	How do you rate the leisure / recreational facilities (inc. restaurants / cafes / takeaways) within the town, compared with competing towns?																
Very good	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly good	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	25.00%	1	
Neither	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Fairly poor	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Poor	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
(Not answered)	92.31%	36	95.00%	19	100.00%	2	100.00%	1	100.00%	1	100.00%	1	90.00%	9	75.00%	3	
Mean:			0		-2		0		0		0		0		1		1
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38N	How do you rate moving around on foot within the town, compared with competing towns?																
Very good	17.95%	7	15.00%	3	0.00%	0	100.00%	1	100.00%	1	0.00%	0	20.00%	2	0.00%	0	
Fairly good	53.85%	21	55.00%	11	100.00%	2	0.00%	0	0.00%	0	100.00%	1	50.00%	5	50.00%	2	
Neither	15.39%	6	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	50.00%	2	
Fairly poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
Poor	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Mean:			0.84		0.65		1		2		2		1		1.13		0.5
Base:		39		20		2		1		1		1		10		4	
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]																	
Q38O	How do you rate the appearance / character (e.g buildings, open space & landscaping) within the town, compared with competing towns?																
Very good	23.08%	9	20.00%	4	0.00%	0	100.00%	1	0.00%	0	0.00%	0	30.00%	3	25.00%	1	
Fairly good	46.15%	18	55.00%	11	50.00%	1	0.00%	0	100.00%	1	0.00%	0	30.00%	3	50.00%	2	
Neither	7.69%	3	5.00%	1	50.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1	
Fairly poor	7.69%	3	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0	
Poor	7.69%	3	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	
(Not answered)	7.69%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	100.00%	1	20.00%	2	0.00%	0	

Mean:	0.75	0.6	0.5	2	1	0	0.88	1
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38P	How do you rate the availability of public seating, open space & parks) within the town, compared with competing towns?							
Very good	23.08%	9	20.00%	4	50.00%	1	100.00%	1
Fairly good	41.03%	16	40.00%	8	0.00%	0	0.00%	0
Neither	15.39%	6	20.00%	4	50.00%	1	0.00%	0
Fairly poor	7.69%	3	5.00%	1	0.00%	0	0.00%	0
Poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0
Mean:	0.75	0.58	1	2	2	1	0.5	1.25
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38Q	How do you rate the town centre management within the town, compared with competing towns?							
Very good	7.69%	3	5.00%	1	0.00%	0	100.00%	1
Fairly good	33.33%	13	35.00%	7	50.00%	1	0.00%	0
Neither	33.33%	13	30.00%	6	50.00%	1	0.00%	0
Fairly poor	7.69%	3	10.00%	2	0.00%	0	0.00%	0
Poor	10.26%	4	15.00%	3	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0
Mean:	0.22	0.05	0.5	2	1	2	-0.13	0.5
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38R	How do you rate the communication between retailers within the town, compared with competing towns?							
Very good	7.69%	3	5.00%	1	0.00%	0	0.00%	0
Fairly good	25.64%	10	35.00%	7	0.00%	0	100.00%	1
Neither	33.33%	13	20.00%	4	50.00%	1	0.00%	0
Fairly poor	20.51%	8	25.00%	5	50.00%	1	0.00%	0
Poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0
Mean:	0.11	0	-0.5	1	-1	2	0.25	0.25
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38S	How do you rate the marketing of the town, compared with competing towns?							
Very good	5.13%	2	5.00%	1	0.00%	0	0.00%	0
Fairly good	25.64%	10	25.00%	5	0.00%	0	100.00%	1
Neither	33.33%	13	30.00%	6	50.00%	1	0.00%	0
Fairly poor	25.64%	10	30.00%	6	50.00%	1	0.00%	0
Poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0
Mean:	0	-0.15	-0.5	1	-1	2	0	0.5
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38T	How do you rate the provision of broadband within the town, compared with competing towns?							
Very good	2.56%	1	0.00%	0	0.00%	0	100.00%	1
Fairly good	28.21%	11	20.00%	4	50.00%	1	0.00%	0
Neither	25.64%	10	25.00%	5	50.00%	1	0.00%	0
Fairly poor	25.64%	10	35.00%	7	0.00%	0	0.00%	0
Poor	12.82%	5	20.00%	4	0.00%	0	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0
Mean:	-0.19	-0.55	0.5	2	0	1	-0.38	0.75
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38U	How do you rate the publicly accessible WI-FI within the town, compared with competing towns?							
Very good	2.56%	1	5.00%	1	0.00%	0	0.00%	0
Fairly good	12.82%	5	10.00%	2	0.00%	0	100.00%	1
Neither	48.72%	19	45.00%	9	50.00%	1	100.00%	1
Fairly poor	17.95%	7	25.00%	5	50.00%	1	0.00%	0
Poor	12.82%	5	15.00%	3	0.00%	0	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0
Mean:	-0.27	-0.35	-0.5	0	0	1	-0.63	0.5
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38V	How do you rate the safety within the town, compared with competing towns?							
Very good	5.13%	2	5.00%	1	0.00%	0	100.00%	1
Fairly good	48.72%	19	45.00%	9	100.00%	2	0.00%	0
Neither	33.33%	13	40.00%	8	0.00%	0	0.00%	0
Fairly poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0
Poor	2.56%	1	0.00%	0	0.00%	0	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0
Mean:	0.51	0.45	1	2	1	1	0.13	0.75
Base:	39	20	2	1	1	1	10	4
Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]								
Q38W	How do you rate the public toilet facilities within the town, compared with competing towns?							

Very good	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0
Fairly good	25.64%	10	30.00%	6	50.00%	1	0.00%	0	0.00%	0	0.00%	0	10.00%	1	50.00%	2
Neither	28.21%	11	30.00%	6	50.00%	1	0.00%	0	100.00%	1	0.00%	0	20.00%	2	25.00%	1
Fairly poor	30.77%	12	30.00%	6	0.00%	0	100.00%	1	0.00%	0	0.00%	0	40.00%	4	25.00%	1
Poor	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	5.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0

Mean: -0.05 0 0.5 -1 0 2 -0.63 0.25

Base: 39 20 2 1 1 1 10 4

Mean score [Good=2, Fairly good=1, Neither=0, Fairly poor=-1, poor=-2]

Q38X How do you rate the cleanliness (e.g.grafti, fly posting, litter) within the town, compared with competing towns?

Very good	17.95%	7	15.00%	3	0.00%	0	0.00%	0	0.00%	0	100.00%	1	30.00%	3	0.00%	0
Fairly good	48.72%	19	50.00%	10	100.00%	2	100.00%	1	100.00%	1	0.00%	0	20.00%	2	75.00%	3
Neither	17.95%	7	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	25.00%	1
Fairly poor	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Poor	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	7.69%	3	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0

Mean: 0.81 0.63 1 1 1 2 1 0.75

Base: 39 20 2 1 1 1 10 4

Q39 In what ways has COVID impacted on your business and what support/resource do you need access to? [MR]

We have been closed for many months	23.08%	9	30.00%	6	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0	50.00%	2
Reduced turnover	12.82%	5	15.00%	3	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0	25.00%	1
Reduced clientele	12.82%	5	15.00%	3	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	25.00%	1
Financial help - not restarting council tax, rent red	7.69%	3	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
People are still scared to go out so business is slow	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Car park price increases are keeping people away	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Car park price increases are keeping people away	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
No adverse effect as could keep operating	5.13%	2	0.00%	0	50.00%	1	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Anything to help footfall in town would be a great	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Business has not returned to pre COVID levels	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Had to work from home	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Decimated	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Due to social distancing we operate at less than fu	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1
Supply chain issues - price and availability	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
The grants help but only with rent	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
It has freed up car parking spaces	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Complete overhaul to enable us to continue to sei	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Not too bad as had grants from Council	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	28.21%	11	20.00%	4	50.00%	1	0.00%	0	0.00%	0	0.00%	0	50.00%	5	25.00%	1

Base: 39 20 2 1 1 1 10 4

Q40 In what ways has BREXIT impacted on your business and what support/resource do you need access to? [MR]

No impact	20.51%	8	20.00%	4	0.00%	0	0.00%	0	100.00%	1	0.00%	0	20.00%	2	25.00%	1
Time consuming and sometimes impossible to imj	12.82%	5	25.00%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ordering less from overseas	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Delays with deliveries	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Massive delays in stock supply	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Restrictions on stock due to shipping restrictions	5.13%	2	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Less overseas visitors spending money	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Big impact on exchange rates	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	43.59%	17	25.00%	5	100.00%	2	100.00%	1	0.00%	0	100.00%	1	50.00%	5	75.00%	3

Base: 39 20 2 1 1 1 10 4

Q41 In what ways do you promote your business (e.g. social media)? [MR]

Social media	28.21%	11	35.00%	7	50.00%	1	0.00%	0	100.00%	1	0.00%	0	10.00%	1	25.00%	1
Facebook	20.51%	8	20.00%	4	0.00%	0	100.00%	1	0.00%	0	0.00%	0	20.00%	2	25.00%	1
Website	17.95%	7	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0
Word of mouth	17.95%	7	10.00%	2	0.00%	0	0.00%	0	100.00%	1	0.00%	0	30.00%	3	25.00%	1
Instagram	12.82%	5	15.00%	3	0.00%	0	100.00%	1	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Cirencester local website	7.69%	3	0.00%	0	0.00%	0	100.00%	1	0.00%	0	100.00%	1	10.00%	1	0.00%	0
We don't	7.69%	3	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Twitter	7.69%	3	5.00%	1	0.00%	0	100.00%	1	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Cirencester local adverts	7.69%	3	15.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trip Advisor	5.13%	2	5.00%	1	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Catalogues	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ciren Scene	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Residents handbook	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Dentors directory	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Newsletter	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Google	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Personal recommendations	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	25.00%	1
Free magazines	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
LinkedIn	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
(Not answered)	25.64%	10	20.00%	4	50.00%	1	0.00%	0	0.00%	0	0.00%	0	30.00%	3	50.00%	2

Base: 39 20 2 1 1 1 10 4

Q42 Do you attend or participate in any local retail or business forums (e.g. Chamber of Commerce)? [MR]

No	48.72%	19	65.00%	13	0.00%	0	100.00%	1	0.00%	0	0.00%	0	40.00%	4	25.00%	1
Chamber of Commerce	10.26%	4	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
Cirencester Business Club	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Rotary	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Round Table	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Bob's committee	2.56%	1	0.00%	0	0.00%	0	0.00%	0	100.00%	1	0.00%	0	0.00%	0	0.00%	0
(Not answered)	35.90%	14	25.00%	5	100.00%	2	0.00%	0	0.00%	0	100.00%	1	30.00%	3	75.00%	3

Base: 39 20 2 1 1 1 10 4

Q43 In your opinion what would help the town centre improve and thrive in the future? [MR]

Free parking	23.08%	9	30.00%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	30.00%	3	0.00%	0
More parking	17.95%	7	20.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	25.00%	1
Fill the empty units	15.39%	6	15.00%	3	50.00%	1	0.00%	0	100.00%	1	0.00%	0	10.00%	1	0.00%	0
Rents reduced	10.26%	4	10.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	20.00%	2	0.00%	0
More independent shops	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
More seating	5.13%	2	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Bigger chain stores	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Better signage	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food fayre	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0

Lift the driving restriction on Cricklade Street	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Local events	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Maximise on seasonal variance	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Improve traffic flow	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Feature stores to return	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
More policemen	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food area in market place	2.56%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	10.00%	1	0.00%	0
Pedestrianised market place	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cleaner town centre	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Shelter for the homeless	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Landlords to work in partnership with tenants	2.56%	1	5.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Not answered)	41.03%	16	35.00%	7	50.00%	1	100.00%	1	0.00%	0	100.00%	1	30.00%	3	75.00%	3
Base:		39		20		2		1		1		1		10		4

Appendix 5: Property Market Report – AspinallVerdi

Market Report

Property Market Report



Cotswold District Council

November 2021

Private and Confidential

Quality Assurance

Date of Report

November 2021

Version

V13

Filename and path

S:_Client Projects\2105 Cirencester Town Centre_Cotswold District Council_Reports\211112 Cirencester Market Report v13.docx

Prepared by

Matthew Wroe, Senior Consultant



August / September 2021

Checked by

Callum Thompson

Date



10th November 2021

Authorised by

Atam Verdi, Director

Date



12th November 2021

Limitation

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1 Introduction

- 1.1 AspinallVerdi have been appointed as sub-consultants to Nexus Planning to contribute to a feasibility study in relation to redevelopment opportunities in Cirencester town centre which will form part of a wider town centre masterplan.
- 1.2 The redevelopment opportunities that exist in Cirencester town centre are mostly surface level public car parks owned by Cotswold District Council. The majority of sites are allocated in the Local Plan on the assumption that replacement capacity will be provided by the development of one of the extant sites – the Waterloo – into a multi-storey facility. This proposal is currently on hold.¹
- 1.3 This property market report provides a context for the consideration of development options for the opportunity sites, and informs Nexus Planning’s assessment of the future composition of the centre.

Scope of Report

- 1.4 We have focussed our analysis on the current retail, leisure and residential offer within Cirencester Town Centre to understand the supply and demand of these uses. We have also considered the cultural and civic leisure offer in Cirencester which plays an important role in the local economy in the Cotswold District.
- 1.5 We conclude our report by providing a summary of our findings and discussing future (re)development which may occur within the town centre which would complement the existing uses.

Figure 1.1 - Cirencester Town Centre Boundary



Source: Cotswold District Council, August 2021

1.6 The structure for the remainder of this report is as follows:

Chapter	Overview
Chapter 2 - Cirencester Baseline Information	Summarises social – demographic data for Cirencester along with the 2018 town centre health check.
Chapter 3 - National Retail and Leisure Market Overview	Summarises the current state of the Retail and Leisure markets more generally to provide some context for the Town Centre analysis.
Chapter 4 - Cirencester Town Centre, Retail	Analysis of deals done and current availability for retail units in Cirencester Town Centre.
Chapter 5 - Cirencester Town Centre, Leisure	Analysis of deals done and availability of leisure space within Cirencester Town Centre. This is broken down into food and beverage, hotels and ‘urban leisure’ i.e., traditional and civic leisure as well as more active forms of leisure such as trampoline parks.
Chapter 6 - Cirencester Town Centre, Residential Development	Provides a high-level overview of the residential market in Cirencester Town Centre. The purpose of this is to understand trends in the market and demonstrate the level of activity within the Town Centre.
Chapter 7 - Soft Market Testing	Provides feedback from a soft market testing exercise undertaken to explore demand from operators for identified sites in Cirencester.
Chapter 8 - Conclusions	Summary of the market paper and recommendations which feed into the main report.

2 Cirencester Baseline Information

- 2.1 This next section provides a summary of the socio-demographics of Cirencester followed by a review of the land use survey of Cirencester Town Centre prepared by Nexus Planning in 2021.
- 2.2 The socio-demographic data considers the age profile of Cirencester and then looks at the wider Cotswold District in terms of the characteristics of the working population.
- 2.3 The land use survey provides a summary of the land use composition of the town centre in 2021.

Cirencester Socio - Demographic Data

- 2.4 Cirencester is the largest town in the Cotswolds with a population of approximately 20,000. The age profile of the Cirencester population includes a high proportion of the retired, aged 65 and over; older working age adults aged 45-64 are also over-represented. In contrast, young adults aged 15-24 and adults aged 25-44 are particularly under-represented within the Cirencester area and children aged 0-14 are moderately under-represented.² The profile of the local community is ageing.
- 2.5 Looking at the wider Cotswold District the proportion of adults of working age categorised within the most affluent AB social group (which includes those in managerial and professional occupations) is 30.39% (the UK average being 22.96%). In contrast, the least affluent D and E social groups (which includes those in skilled and unskilled manual employment, the unemployed and those on state benefits) are particularly under-represented within the Cotswold area (17.58%) and social group C1 (which includes junior non-manual employees) is moderately under-represented (29.77%).³

² https://www.gloucestershire.gov.uk/media/1521250/glos-parishes-cotswold-cirencester-cp-glos_li_parish_e04004205-20161109063544848.pdf

³ <https://www.ilivehere.co.uk/statistics-cirencester-gloucestershire-8363.html>

Cirencester Town Centre – Land Use Survey 2021

- 2.6 As part of the wider commission, Nexus Planning carried out a land use survey of Cirencester Town Centre on the 2nd July 2021. The results of this survey are explained in detail in the main feasibility study prepared by Nexus. We provide below a short summary of the key facts.
- 2.7 Table 2.1 below provides a summary of the land use composition of the town centre as identified through the work undertaken.

Table 2.1 - Composition of Cirencester Town Centre

Sector	Floorspace (sqm)	Proportion of Floorspace (%)	National Average Floorspace (sqm)	Number of Units	Proportion of Units (%)
Comparison	19,510	38.2%	31.4%	138	41.1%
Convenience	4,030	7.9%	15.4%	20	6.0%
Financial	5,270	10.3%	7.0%	35	10.4%
Leisure	10,700	21.0%	25.7%	51	15.2%
Retail	5,080	10.0%	7.2%	55	16.4%
Vacant	6,420	12.6%	12.8%	37	11.0%
Total	51,010	100.0%	100.0%	336	100.0%

Source: Nexus Planning land use survey of July 2021; national average figures derived from July 2021 Experian Goad Category Report

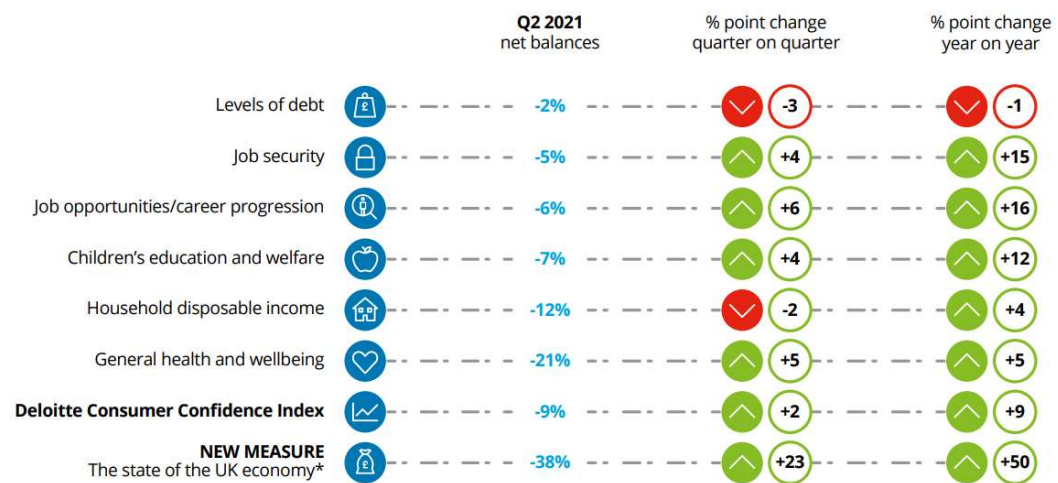
- 2.8 Nexus report that the town centre's composition is very broadly comparable to the national average position. Comparison goods retail remains the most dominant single use in the centre, followed then by leisure services. These uses are augmented by Cirencester's retail and financial services offer, and by its convenience goods retail offer. The fact that the convenience goods offer is below national average level is not surprising given the wider role of Cirencester, and the propensity for some grocery shopping to be undertaken close to home in local and district centres. Comparison goods retail uses account for 38.2% of the total stock of retail floorspace and 41.1% of all such units. These figures are higher than the respective national average figures, and demonstrate the ongoing importance of the comparison goods sector to a centre of Cirencester's size.⁴

⁴ Cirencester Town Centre Feasibility Study,

3 Retail and Leisure Market Overview

- 3.1 Using secondary sources, this section provides an overview of the national retail and leisure markets to give some context to the analysis at a town-centre level.
- 3.2 When considering the performance of the retail and leisure sectors, it is useful to understand the wider economic trends. The Deloitte Consumer Tracker⁵ hit a record low in 2020, as the impact of COVID-19 unfolded in the UK. However, following a strong rebound in Q1 2021, consumer confidence bounced back to its pre-COVID-19 level in Q2 2021 as the Deloitte Consumer Confidence Index rose by two percentage points quarter on quarter to -9%.
- 3.3 Figure 3.1 provides an overview of consumer spending confidence. The COVID-19 pandemic had an impact across all six measures of consumer confidence in 2020, however in Q2 2021, the consumer confidence measures have improved.

Figure 3.1 - The Deloitte Consumer Tracker Q2 2021



Source: Deloitte Consumer Tracker Q2 2021

- 3.4 In Q2 2021, consumer confidence about their levels of debt was 1 percentage point down compared to a year ago, which is a sign that consumer spending is resuming and that official consumer borrowing numbers have increased for the first time since summer 2020.
- 3.5 With regards to job security, this rose by 4 percentage points to -5% compared to Q1 2021. The Job Retention Scheme and other forms of government support successfully prevented sharp increases in unemployment by protecting jobs and incomes at the height of the pandemic but also, crucially, preserving links between skilled staff and employers, so that businesses could

⁵ The Deloitte Consumer Tracker Q2 2021

reopen quickly as restrictions lifted and workers could pick up their careers rather than being forced to make a fresh start.

- 3.6 With regards to job opportunities, the latest Deloitte CFO Survey anticipates a sharp increase in hiring by CFOs, which is echoed by a strong bounce back in consumer sentiment around job opportunities and career progression which gained six percentage points to -6% compared to Q1 2021.
- 3.7 In respect of consumer confidence about general health and wellbeing, there has been a jump in overall confidence index since Q1. This measure is clearly interrelated to the waves of the pandemic and subsequent lockdowns.
- 3.8 After having recorded sustained growth throughout the last year, optimism surrounding disposable income slowed down in Q2 2021 compared to Q1. Consumer confidence about household levels of disposable income fell by two percentage points to -12% compared to Q1 2021, however it remains four percentage points higher than a year ago.
- 3.9 In Q2 2021 consumer sentiment around the state of the UK economy bounced back by 23 percentage points to -38% bringing the measure much closer to its pre-COVID baseline.

Retail Trends 2021

- 3.10 CBRE's '2021 UK Real Estate Market Outlook'⁶ states that *"the retail real estate market has arguably been suffering the most as a result of the pandemic. This sector, above all others, has experienced a dramatic acceleration of trends already present in UK retail prior to the pandemic."*⁷
- 3.11 This has been evidenced through the closure of non-essential retail stores during lockdowns which put severe pressure on retailers' revenues and will continue to affect their performance in 2021. For many retailers, this will mean sustained pressure on margins, store rationalisation and supply chain restructuring. In some cases, an inability to meet financial liabilities will lead to insolvency and business restructuring. The resulting shift towards shorter, more flexible lease structures and turnover leases will change how the retail real estate operates.
- 3.12 Throughout the lockdown periods, those retailers which were able to keep their stores open have performed better and are expected to show greater resilience in 2021 and the years after. This includes supermarkets, homeware and DIY retailers. Even so, supermarket rents are expected to decline by 3.5% in 2021, though this is a relatively lower decline than other retail asset types.
- 3.13 The rise in online shopping, driven by the UK-wide lockdown, is likely to continue throughout 2021, as retailers continue to invest in their online platforms and move a larger proportion of their sales online. Data for the Office of National Statistics (ONS) shows that online shopping has been

⁶ <https://www.cbre.co.uk/research-and-reports/2021-UK-Real-Estate-Market-Outlook>

⁷ 2021-UK-Real-Estate-Market-Outlook – Page 14

steadily growing year-on-year for some time rising from 18% to 19.2% of retail sales in 2019. The pandemic has accelerated this shift though with reports showing that internet sales jumped in 2020 to represent 28% of all retail sales – a 46% increase on 2019⁸. Thriving online sales were driven by increases within food and drink, and digital content as people continued to use online grocery shopping, order takeaway food, and sign up to TV subscriptions to keep themselves entertained. Some of the big winners include Tesco, who reported an almost 70% increase in internet sales⁹, and online retail giant Amazon, who announced a 37% increase in sales¹⁰.

3.14 Knight Frank published their 2021 Retail Property Market Outlook '*The Show Must Go On*'¹¹ earlier in the year. Within this document there are a number of key messages regarding the retail market which are summarised below

- Changes to high street retail have been accelerated by COVID-19 and are expected to continue throughout 2021 with the expectation that retailers will look to rationalise their stores with the aim of reducing their overall stock.
- Free from the constraint of lockdowns and with considerable pent-up demand, retail sales are forecast to grow by ca. 5% in 2021.
- Community Voluntary Arrangement (CVAs) are likely to continue, particularly in the fashion sector which has been crippled by an oversupply (too many operators, too many stores) and reduced consumer demand during 2020 (clothing sales down ca. -25%-30%).
- Flexibility and affordability will be the two defining forces of occupier markets in 2021. This will become evident through shorter leases and a continued push towards turnover rents. But these need to be a two-way street to be effective, with retailers and landlords being transparent and collaborating.

3.15 Recent headlines have focussed on failing retailers and store closures¹². High profile retailers that have struggled include:

- Amanda Wakeley, the fashion designer, went into administration in mid-May 2021.
- Paperchase, the up-market stationery, student accessories and gift business, has gone through a pre-pack administration, closing 37 stores with the loss of 500 jobs. Before issuing a notice of intent to appoint administrators in early January 2021, the company had 127 stores and around 1,500 staff.

8 <https://solve.co.uk/seo-tips/rise-of-online-shopping/>

9 <https://www.essentialretail.com/news/tesco-growth-online-profits-surge/>

10 <https://press.aboutamazon.com/news-releases/news-release-details/amazoncom-announces-third-quarter-results>

11 <https://www.knightfrank.com/research/report-library/retail-property-outlook-2021-7680.aspx>

12 Who's Gone Bust in Retail? The Centre For Retail Research

- News that BooHoo is to acquire Debenhams' website, brands and goodwill, but close Debenhams' stores, came on 25 January 2021¹³.
 - Arcadia Group stores, including Topshop, Topman, Burtons and Dorothy Perkins, announced the closure of 12 stores in January 2020¹⁴ and has since ceased trading, which included a Burtons and Dorothy Perkins store in Cirencester Town Centre.
 - Laura Ashley went into administration in March 2020, resulting in the closure of 150 stores¹⁵, this included the Cirencester Town Centre store.
 - Dixons Carphone announced the closure of 531 stores in March 2020¹⁶, which again included a store in Cirencester Town Centre.
- 3.16 Since lockdowns have eased with the vaccine roll-out some retail and leisure operators have made announcements for new store openings, these include:
- Costa
 - Greggs
 - Five Below
 - Lidl/Aldi/ Co-operative
 - Pure Gym and other health and fitness operators.
- 3.17 Store formats and requirements are continuing to evolve, primarily due to the effects of internet retailing and the pandemic.

Leisure Trends 2021

- 3.18 The COVID-19 pandemic triggered profound changes in consumer behaviour almost overnight. Not only did the lockdown restrictions lead to a significant increase in in-home leisure activities, they also accelerated the shift to online.¹⁷
- 3.19 Since the ending of the national lockdown in June 2021, there has been increased spending in the leisure sector as consumers returned to socialising in restaurants and bars. The 'eating out' and 'drinking in pubs and bars' categories saw the biggest quarterly rise in net spending and they are now significantly higher than their pre-COVID levels. These two categories were up by 50

13 <https://www.bbc.co.uk/news/business-55793411>

14 Article headlined 'Philip Green's Arcadia closes more stores after tough Christmas', The Guardian, 16 January 2020

15 Article headlined 'Laura Ashley to file for administration as coronavirus takes toll', The Guardian, 17 March 2020

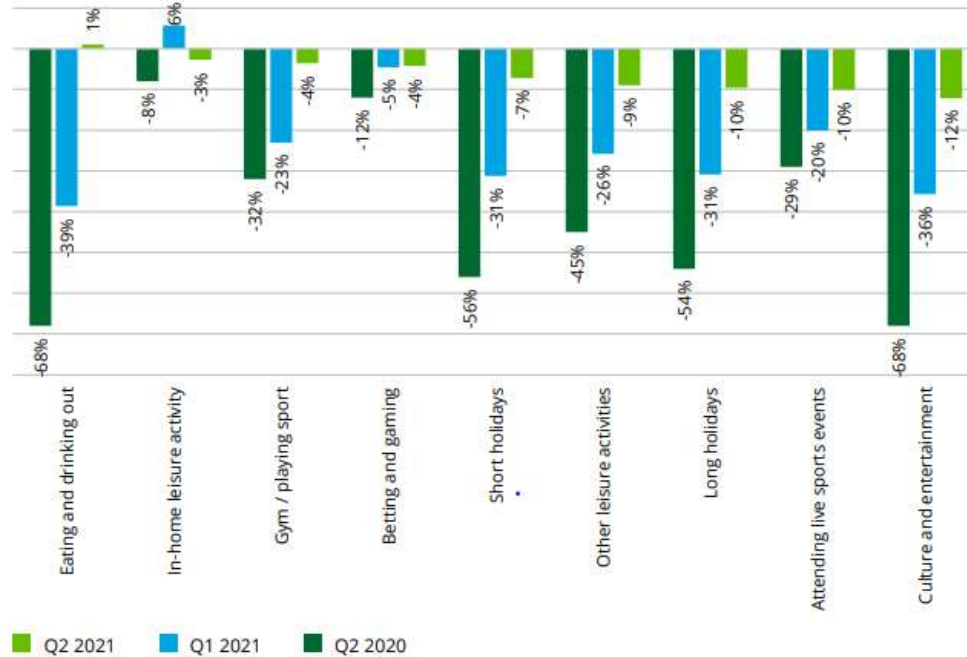
16 Article headlined 'Dixons Carphone to close 531 stores, with loss of 2,900 jobs', The Guardian, 17 March 2020

17 <https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/consumer-business/deloitte-uk-the-leisure-consumer-2021.pdf>

percentage points and 38 percentage points respectively, compared to the previous quarter. Figure 3.2 shows the net percentage of UK consumer spending for each of the categories.

3.20 According to the ONS turnover in the hospitality sector rose to £6.9 billion in May 2021. This is due to the reopening of the hospitality sector when the lockdown regulations eased in the summer of 2021.¹⁸

Figure 3.2 - Net % of UK Consumer Spending

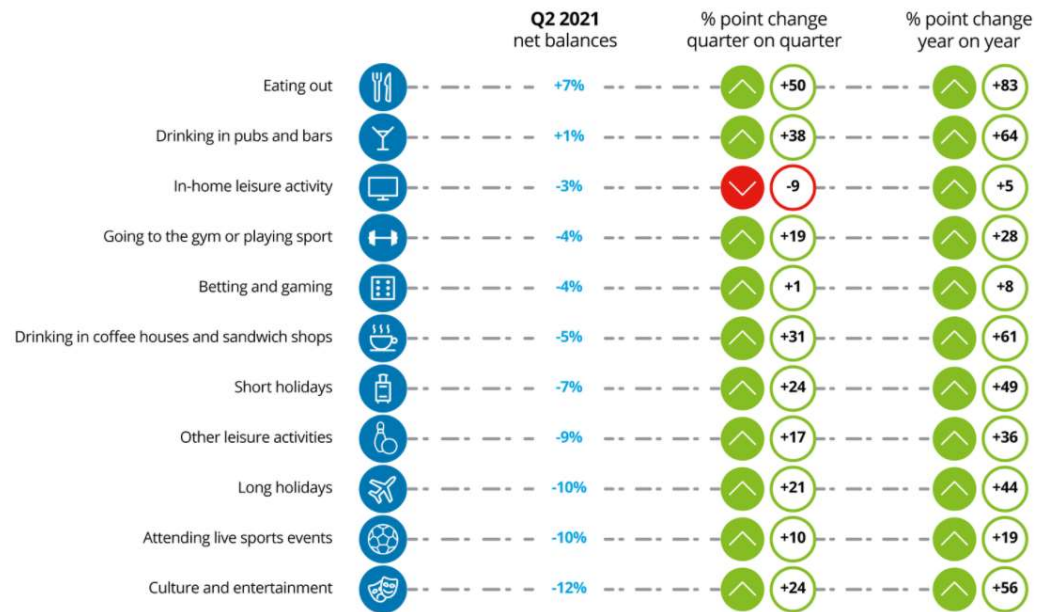


Source: Deloitte Consumer Tracker Q2 2021

3.21 Figure 3.3 shows leisure spending in Q2 2021 by category. It shows that the percentage points quarter on quarter in all categories apart from in-home leisure activity have increased, signalling high levels of pent up demand.

¹⁸<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/articles/coronavirusanditsimpactonukhospitality/january2020tojune2021>

Figure 3.3 - The Deloitte Consumer Tracker for Leisure Q2 2021



Source: Deloitte Consumer Tracker Q2 2021

4 Cirencester Town Centre - Retail

- 4.1 Our retail property market assessment focuses on availability and deals done using databases Estates Gazette Radius Data Exchange (EGi) and CoStar. Figure 4.1 shows the area of search.
- 4.2 We have analysed data for leasehold and freehold transactions within a three-year period from 1st August 2018 - 1st August 2021. Due to the fact that these databases rely on agents reporting transactions, it may be that not all transactions have been recorded.

Figure 4.1 - Area of Research



Source: Estates Gazette Radius Exchange

- 4.3 Retailing is focused on Cricklade Street, the town's historic retailing thoroughfare and still remains home to many of the multiples including Waterstones, Boots and Superdrug. Recently, however there has been a sharp increase in vacant units due to the loss of several national multiples, including; Halfords, Poundland, Dorothy Perkins / Burtons and New Look. Market Place offers the more boutique offering around the historic St John the Baptist Church, including Crew, Joules, Phase 8 and Fat Face. Dyer Street is an extension to Market Place and supports larger floor plates.

Town Centre Health Check Reports

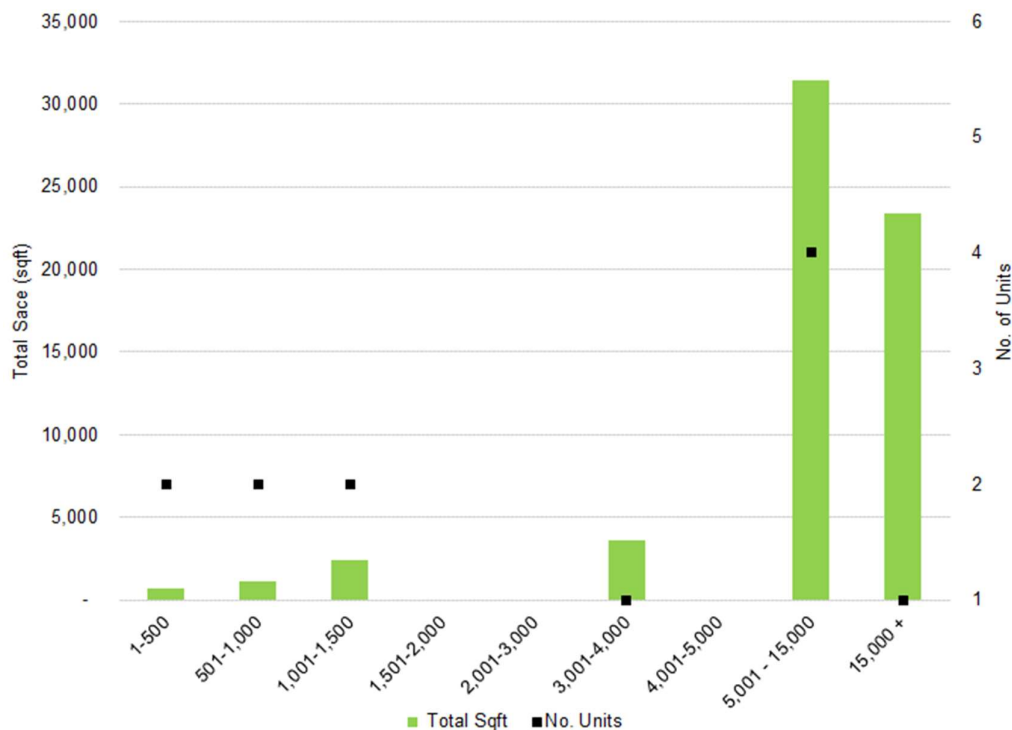
- 4.4 The 2012 health check discussed how property agents had reported that the town centre's units were too small and generally the wrong shape for multiples. This was due to many of the units being listed buildings and/or having no space to expand. This issue was highlighted again in 2018.
- 4.5 In 2017 the Cirencester Retail Park development at Love Lane was opened and provides larger format units. The 2012 health check report suggested that the small units, however, have some positive attributes, which includes their contribution towards the town centre's distinctive character and tourist appeal, small and medium sized businesses with a choice of formats, locations, leases and rents. Furthermore, many town centres now have sizeable gaps in their high street frontages resulting from the loss of large national retailers such as BHS, Marks & Spencer and Woolworths; Cirencester's smaller units have helped to mitigate this problem.¹⁹
- 4.6 Of course Cirencester has suffered from the closure of House of Fraser following the company entering into a company voluntary arrangement. Several larger stores have also been vacated on Cricklade Street, including Burtons / Dothory Perkins, Halfords, New Look and Poundland.

Availability

- 4.7 There are currently (August 2021) 12 retail units (Use Class E) available within the search area, totalling 62,705 sqft. Over 50% of the floorspace relates to two stores (see below). Of these 12 units, one is available on a freehold basis and the remainder on leases.
- 4.8 Figure 4.2 below breaks down the availability across different floorplate sizes. It shows that there are 6 retail units which have floor areas of less than 1,500 sqft. The largest unit available as a leasehold is located at 4 – 5 Farrell Close. This property is situated within a small precinct anchored by Tesco with one of the main town centre car parks (Brewery car park) in close proximity. The property comprises 10,349 sqft of accommodation. The largest unit available as a freehold is the former House of Fraser department store located on at 29 – 35 Market Place and has a floor area of 23,414 sqft.
- 4.9 In terms of asking rents, these range between £12.08 and £66.07 on a per square foot (psf) basis. The wide variance being largely due to the size of the unit. The highest rent relates to a unit located at 2 Cricklade Street which has an asking rent of £37,000 per annum (£66 psf). The unit has a floor area of 560 sqft.

¹⁹ <https://www.cotswold.gov.uk/media/1xobaapl/4202-cirencester-town-centre-health-check.pdf>

Figure 4.2 - High Street Retail Availability



Source: AspinallVerdi using Radius Data Exchange, August 2021

Leasehold Deals

- 4.10 On the demand side, over the last three years (since August 2018) there has been a total of nine transactions reported on EGi / CoStar which total 19,514 sqft of A1 accommodation. Table 4.1 below shows that the majority of leasehold transactions have been for units between 306 - 3,108 sqft with limited demand for units over 3,000 sqft.
- 4.11 The largest unit, located on Cricklade Street (4,622 sqft), was leased by Doggit and Edward Ltd.
- 4.12 In terms of lease lengths, we note from our analysis of the data collected that the average length is 5 years, with the longest leases being 10 years. There is also evidence of rent-free periods of up to 6 months.

Table 4.1 - Leasehold Deals for High Street Retail

Address	Deal Date	Achieved Rent pa (£)	Size (sqft)	£/sqft pa
19-23 Market Place	September 2021	£35,000	3,647	£9.60
2 Cricklade Street	August 2021	£30,000	4,622	£6.49
17 Dyer Street	September 2021	£12,600	2,116	£5.95
Unit 4, Woolrich House, The Waterloo, Cirencester, Gloucestershire, GL7 2GA	10/07/2020	£17,000	967	£17.58
17-19, Gosditch Street, Cirencester, GL7 2AG	20/12/2019	£20,000	3,108	£6.44
63, Castle Street, Cirencester, GL7 1QD	24/10/2019	£15,000	512	£29.31
10a, Castle Street, Cirencester, GL7 1QA	18/10/2019	£27,000	688	£39.24
30a, Castle Street, Cirencester, GL7 1QH	04/10/2019	£65,000	1,561	£41.65
3-5, West Market Place, Cirencester, GL7 2NH	03/10/2019	£44,500	2,293	£41.65

Source: AspinallVerdi using Estates Gazette Radius Exchange, August 2021

Freehold Deals

- 4.13 In terms of freehold deals for high-street retail space, we are only aware of one deal in the last three years. This deal was for the Post Office located at 19-21 Castle Street. In terms of the capital value, the unit has been acquired for £240,000. It was purchased by Swan Yard Limited in August 2019.

Investment Deals

4.14 In terms of investment deals for high-street retail space, we are aware of 3 transactions totalling 30,063 sqft within the review period. These units sold for between £225,000 and £2.1m, in terms of Net Initial Yield, we have evidence ranging between 5% and 6.75%.

4.15 Table 4.2 below sets out the investment deals for high street retail units in Cirencester.

Table 4.2- Investment Deals for High Street Retail

Address	Deal Date	Achieved Price (£)	Size (sqft)	£/sqft
4/6, Black Jack Street, Cirencester, GL7 2AA	27/03/2020	£225,000	5,657	£40
11, Dollar Street, Cirencester, GL7 2AS	05/09/2019	£360,000	2,623	£137
Entire Building, 25-27, Dyer Street, Cirencester, GL7 2PP	01/04/2019	£2,100,000	21,783	£96

Source: AspinallVerdi using Estates Gazette Radius Exchange, August 2021

4.16 25 – 27 Dyer Street consists of a retail parade with upper floors and 40 car parking spaces. The investment opportunity was marketed by KLM retail and has the benefit of planning permission to convert the upper floors to residential. The retail units are all occupied with the following tenants

- 25 Dyer Street – Savers Health and Beauty
- 27 Dyer Street – Argos Limited
- 27a Dyer Street – Salvation Army Trustee Company
- First floor 27 Dyer Street – Dance School.

4.17 Table 4.3 below provides the tenancy schedule for the four tenants.

Table 4.3- Tenancy Schedule for 25 - 27 Dyer Street

Unit / Description	Tenant	Lease Start	Lease Expiry	Next Review (Break)	Current Net Rent £ pa	£ PSF Zone A/ GIA	ERV (ZA/PSF)
25 Dyer Street	Savers Health & Beauty Ltd	22/11/2013	22/02/2027	29/03/2023 (10/04/2021 Mutual break)	£44,212.00	£30.72	£47,500 (33.00 ZA)
27 Dyer Street	Argos Ltd	10/04/1996	09/04/2021	N/a	£80,000.00	£33.00	£80,000 (£33.00 ZA)
27a Dyer Street	Salvation Army Trustee Company	23/05/2008	09/04/2021	23/05/2018	£14,665.00	£30.98	£15,600 (£33.00 ZA)
First Floor 27 Dyer Street	Natasha Webb t/as Young Performers dance school	25/12/2017	24/12/2020	N/a (Rolling 3 month mutual break)	£12,069.00	£2.35	£20,500 (£4.00 PSF)
Substation	Southern Electric Power	N/a	New 21 year lease	N/a	£150.00	N/a	N/a
Total					£151,096.00		£163,600.00

Source: <https://www.klm-re.com/UserFiles/Properties/3018/Brochure/Cirencester%20-%2025-27%20Dyer%20St.pdf>

Business Rates

- 4.18 The British Property Federation and British Retail Consortium have been making representations to government for Business Rates reform. These costs are significant, especially for larger units which fall outside relief regimes (i.e. Small Business Rates Relief and more recently the relief provided to retail and leisure operators).
- 4.19 In addition to rental costs Business Rates are a current substantial overhead and increasingly a barrier to investment from new operators and re-use of accommodation. Many commentators suggest that this puts online operators at an advantage.
- 4.20 Business Rates are outside the control of Cotswold Council and therefore until central government undertake substantial reform these issues will to some extent remain.

Summary

- 4.21 Whilst there have been transactions during 2020, it is clear that the pandemic has reduced market activity when compared to activity in 2019. Nexus Planning have provided retail expenditure data from Experian within their report²⁰. We provide below a summary of this below.
- The latest growth rates suggest that changes in shopping behaviour associated with Covid-19 significantly influenced consumer expenditure in 2020, but indicate that growth in

²⁰ Nexus – Cirencester Town Centre Feasibility study

comparison goods expenditure should pick up in the short to medium term as restrictions ease and confidence in the economy returns. Experian's approach has assumed that medical advances would mitigate the impact of Covid-19 by mid-year 2021, and that Government measures successfully limit the impact of the pandemic on jobs and the economy as a whole.

- The general outlook is different in respect of convenience goods, with substantial short-term growth apparent in 2020 as a consequence of 'stockpiling' in the early part of the year and additional meals being consumed at home whilst restrictions were imposed on travel and behaviour. Thereafter, Experian assumes that this additional convenience goods spending is reversed (i.e. spending is reduced) when greater normality returns.
- For convenience goods, Experian estimates annual per capita growth of 8.4% in 2020, followed by a 6.2% contraction in per capita expenditure in 2021. Experian then forecasts very limited annual per capita expenditure growth across the remainder period to 2040. Overall, it is evident that per capita convenience goods expenditure is forecast to remain very similar across the entire period 2020 to 2040.
- The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will recover from a decline of 8.5% at 2020 to increase by 6.5% in 2021 and 3.8% in 2022, thereafter remaining at 2.8% or 2.9% per annum in the period from 2023 to 2040. Experian's forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

- 4.22 The overall vacancy level is relatively low, although it is slightly higher than the national average. This can be attributed to the loss of several national multiples as identified earlier in this section.
- 4.23 We would anticipate that as the economy recovers that the accommodation will be taken-up, although rental levels may reduce due to the competitive nature of the market.
- 4.24 Business Rates are a significant cost, where relief is not available and therefore this does impact on larger uses and the attractiveness of the space from occupiers. It should be noted that property owners will be liable for empty property rates, although listed buildings are exempt.

5 Cirencester Town Centre - Leisure

5.1 This chapter looks at the leisure market in Cirencester Town Centre. Our property market assessment focuses on deals done and availability using EGi and CoStar. The analysis is focused on the area shown above in Figure 1.1 and the evidence is broken down into the following categories:

- Food and beverage
- Hotels market
- Leisure space

5.2 We have analysed data within a three-year period from 1st August 2018 - 1st August 2021. The data recorded during this period with Estates Gazettes is not a conclusive list of all transactions to have taken place.

5.3 Prior to examining the specific sectors we provide an overview of the visitor economy.

Visitor Economy - Overview

5.4 We have reviewed the 'Economic Impact of Gloucestershire's Visitor Economy 2019 – Cotswold District' which was prepared in November 2020. The report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Cotswold District and Gloucestershire County in 2019. This data does not reflect the last 18 months during the COVID-19 pandemic.

5.5 Table 5.1 provides a summary of the value of Tourism for the Cotswold District.

Table 5.1 - Value of Tourism for the Cotswold District

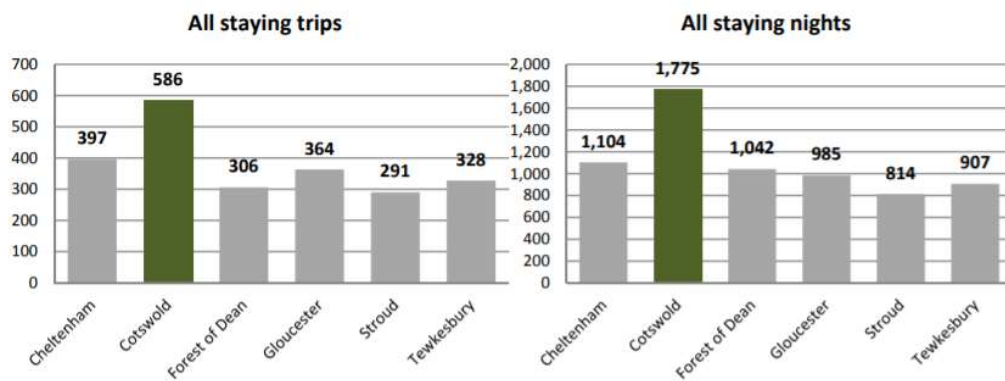
Key Facts	
586,000	Staying visitor trips
1,775,000	Staying visitor nights
£138,311,000	Staying visitor spend
7,019,000	Day visits
£221,648,000	Day visitor spend
£359,959,000	Direct visitor spend
£6,513,000	Other related spend
£366,472,000	TOTAL VISITOR RELATED SPEND
£418,098,000	TOTAL BUSINESS TURNOVER SUPPORTED

Source: <https://www.cotswolds.com/dbimags/Cotswold%202019.pdf>

Cotswold - Staying visits in the County context

5.6 Figure 5.1 shows the number of 'all staying trips' and 'all staying nights' (in the thousands) across the different areas within the Gloucestershire County.

Figure 5.1 - Staying visits in the County context



Source: <https://www.cotswolds.com/dbimags/Cotswold%202019.pdf>

5.7 It can be seen that the Cotswold District has outperformed the other five areas in both all staying trips and all staying nights.

- 5.8 In terms of the visiting purposes, the data suggests that for both domestic and overseas tourists, the main purpose has been for a holiday. There were 440,000 domestic holiday trips and 30,000 overseas holiday trips to Cotswold District in 2019.

Cotswold - Business Turnover

- 5.9 Table 5.2 shows the turnover derived from trip expenditure in the Cotswold District. The largest amount of money spent in 2019 related to 'catering' followed by 'retailing'.

Table 5.2 - Cotswold - Business Turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£50,067,000	£1,927,000	£51,994,000
Retailing	£22,558,000	£59,387,000	£81,945,000
Catering	£29,782,000	£93,461,000	£123,243,000
Attractions/entertainment	£14,819,000	£35,467,000	£50,286,000
Transport	£12,651,000	£18,844,000	£31,495,000
Arising from non trip spend	£6,513,000	£0	£6,513,000
Total Direct	£136,390,000	£209,086,000	£345,476,000

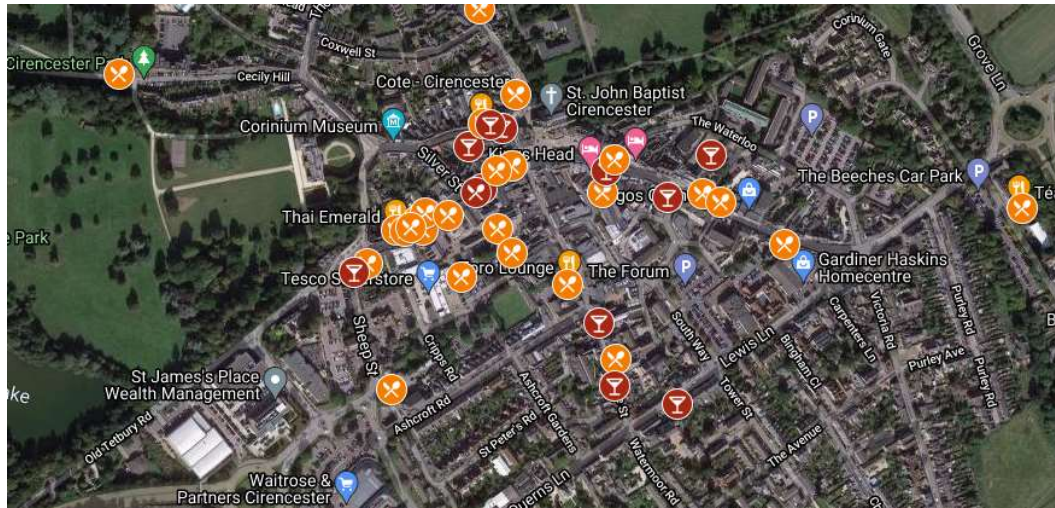
Source: <https://www.cotswolds.com/dbimngs/Cotswold%202019.pdf>

- 5.10 It is clear from Table 5.2 that there is a significant visitor economy in the Cotswolds and indeed in Cirencester, which the Town Centre operators will be serving. Whilst the pandemic lock-downs will have impacted on these businesses, the buoyancy of the staycation market may now assist local businesses.

Food & Beverage (F&B) - Market Activity

- 5.11 This section deals with the F&B sector, classified (Use Classes Order 2020) as:
- Restaurants and Cafes - Use Class E
 - Drinking Establishments - Sui Generis
 - Hot Food Takeaways - Sui Generis
- 5.12 Figure 4.1 provides a general idea of the distribution of the F&B sector across the town centre. There is a clear concentration of shopping and leisure areas including Cricklade Street, Dyer Street, and Market Place.

Figure 5.2 - Existing Supply of F & B Space



Source: Google My Maps, August 2021

- 5.13 The above uses all have permitted changes of use back to E (a) (Shops) or E (c) (Professional and Financial Services). This makes it difficult to be completely accurate when analysing the data from EGi and CoStar as it depends on how the deal was registered on the system. For example, an E (a) unit may be let indicating take-up of such space, but this could be to an F&B operator who is seeking a change of use other E use classes or vice versa. We have sought to interrogate the data as much as possible to provide a clear picture of supply and demand for the respective types of retail and leisure space.
- 5.14 We have utilised EGi and CoStar to identify freehold and leasehold transactions for food and beverage operators across the study area.

Availability

- 5.15 There are currently (September 2021) no vacant food and beverage units available on either a freehold or leasehold basis in the study area.

Leasehold Deals

- 5.16 In terms of leasehold deals, the most recent deal we have found is for a restaurant, Piazza Fontana located at 30a Castle Street. This property was leased in October 2019 for a rental value of £65,000 per annum which equates to £41.65 per sqft.

Freeholds / Investment Deals

- 5.17 In terms of freehold deals, the most recent deal we have found is for a pub, the Waggon and Horses located at 11 London Road. This pub sold in August 2018 for £375,000.
- 5.18 We also identified a further two pubs which sold in 2016
- The Twelve Bells located at 12 Lewis Lane which sold for £490,000.
 - The Oddfellows Arms located at 14 Chester Street which sold for £407,000.

Summary

- 5.19 The research indicates a significant amount of leisure accommodation/operations within Cirencester Town Centre. There are no leisure units being marketed as of September 2021. However, it is anticipated that some of the units, which have been earlier identified as vacant retail units, may come forward for leisure uses.

Hotel - Market Activity

- 5.20 The hotel / overnight accommodation market is specialist, and it is challenging to analyse at a town-centre level in Cirencester given the pace of market activity and availability of data.
- 5.21 With limited evidence, our approach has been to look more broadly at the existing evidence base and market reports which consider the performance of this sector and whether such trends resonate with Cirencester.
- 5.22 UK hotel trading performance is set to decline significantly in 2021 due to the impact of the COVID-19 pandemic, according to research from PwC. In the bleakest outlook since benchmarking began in the 1970s, hotel occupancy rates in 2021 are forecast to be 55% across the UK, and could take four years to return to pre-pandemic levels.²¹ This prediction forms part of PwC's UK Hotels Forecast 2020-2021 analysis into market conditions for hotels over the next 12 months. Although seeing some relief to the precipitous decline of 2020, the forecast for occupancy rates in 2021 is 52.4% for London and 59.2% for the regions reflecting the restrictions imposed in the early part of 2021. This is in comparison to pre-COVID-19 2019 occupancy rates of 83.4% and 75.4% respectively. The UK regions are expected to fare better than the capital in 2021. A stronger staycation market will remain a fixture, whilst unpredictable overseas travel, ongoing restrictions and local lockdowns, will further fuel demand for domestic leisure tourism.²²
- 5.23 In May 2021, Lambert Smith Hampton published a research paper called 'Back in Business'²³ which focussed on the impact which COVID-19 has had on the hotel sector. We summarise the key points below
- After being closed for leisure purposes since 4th January 2020, hotels in England were able to reopen on the 17th May. Prior to opening, hotels were only able to accommodate guests for essential, legally permitted reasons such as work and education purposes, or where a hotel was used as a main residence. As a consequence, hotel occupancy rates typically averaged 25-35% in most UK markets during the early months of 2021.

Staycations to drive demand

- Hotel operators will look primarily to the staycation market to drive a recovery in occupancy over the coming months. A repeat of the trend seen in summer 2020 is likely, with markets focused on domestic tourism, such as Brighton, Bournemouth and the Lake District, seeing occupancy rates that are close to or above normal; while occupancy lags behind in larger city markets such as London, Manchester and Birmingham. For a second successive year, regional UK markets are set to outperform London.

21 PwC Hotels Forecast: COVID-19 pandemic prompts most volatile outlook for fifty years

22 PwC UK Hotels Forecast 2020 – 2021

23 <https://www.lsh.co.uk/explore/research-and-views/research/2021/may/hotel-reopening---back-in-business>

- Another key source of bookings will be weddings that have been delayed or postponed as a result of lockdowns. Pent-up demand will be released when restrictions are fully removed in late June, and many hotel wedding venues report that they are now booked up well into 2022 and 2023.
- International demand will take longer to return strongly, but improvements should be seen as vaccination programmes are rolled out globally and governments ease restrictions on overseas travel. VisitBritain forecasts that inbound tourism to the UK in 2021 will be 11.7 million visits, up 10% on 2020 but still only 29% of the 2019 level.

Businesses down but not out

- Hotel revenues have been severely impacted by restrictions on activity throughout the pandemic. UK-Hospitality estimates that the hospitality sector lost £80.8bn of sales in the 12 months to March 2021; while Whitbread, the UK's largest hotel group, reported that total accommodation sales were down by 70.4% in the 2020/21 financial year.
- Nonetheless, government support has helped to cushion the blow of the pandemic and prevented a large wave of hotel business failures. Although some smaller chains and independent hotels have gone out of business citing COVID-related difficulties, registered company insolvencies in the accommodation and food services sector actually fell by 27% in 2020 compared with 2019, and dropped to a decade-low in Q1 2021.

5.24 Figure 4.2 shows Cirencester's existing provision of overnight accommodation by type as follows:

- traditional hotel such as Premier Inn and Travelodge (red)
- Independents (purple), and
- Airbnb (yellow).

5.25 There is a clear concentration of overnight accommodation located on Dyer Street, Market Place and Gloucester Street.

Figure 5.3 - Overnight Accommodation in Cirencester by Type



Source: Google My Maps, August 2021

- 5.26 It can be seen from the above that the independent and Airbnb sector is very active in Cirencester, with Premier Inn and Travelodge being the only two main operators present. Both of which are located in out-of-town locations.
- 5.27 We are aware that there is a change of use planning application (21/00172/FUL) relating to the conversion of the upper floors of Barclays Bank located at 28 Market Place into 5 hotel bedrooms. This application was granted planning permission in June 2021.

Leisure & Cultural Offer

- 5.28 In addition to the property market analysis presented above we have undertaken research into the provision of other leisure and cultural amenities which enable an understanding of the overall visitor offer in Cirencester. The aim is to gain an understanding of what attractions there are that would attract visitors (footfall) into the town.
- 5.29 For clarity, we have considered the following types of uses as urban leisure:
- Beer Pong / Crazy Golf Bars
 - Cinemas
 - Health & Fitness i.e., gyms & fitness centres
 - Escape Rooms
 - Museums & Galleries
 - Ten-pin Bowling
 - Theatres / Performance Venues
 - Trampoline Parks
- 5.30 We have done a search for deals done and availability of space for such uses but as with hotels, these are niche markets and evidence is limited. Therefore, we have approached it in a similar manner to the hotel summary above and where possible, been specific to Cirencester. Figure 5.4 shows the existing supply of 'urban leisure' space.
- 5.31 Our analysis of the current leisure offer shows that there is a range of activities, mainly related to outdoor and sports. Key attractions include:
- Cirencester Amphitheatre - On the outskirts of the Cotswold town of Cirencester are the remains of one of the largest Roman amphitheatres in Britain²⁴. This attraction is managed by Cirencester Town Council and is free of charge.
 - Bingham Hall - Bingham Hall is the largest fully-equipped hire venue in Cirencester. Facilities include:
 - Shows, concerts and performances for up to 400 people
 - Stage for live performances
 - Rehearsal rooms
 - Evening reception suites for late night events or receptions.
 - The Queen Anne's Monument stands in the grounds of Cirencester Park. It was erected in 1741 to her memory by the first Earl Bathurst, whom she had created Baron Bathurst in 1712.²⁵
 - The Barn Theatre was established as a charity by Ian and Chrissie Carling with the vision of building a bold legacy in the arts for the community of Cirencester and the Cotswolds²⁶.

²⁴ <https://www.english-heritage.org.uk/visit/places/cirencester-amphitheatre/>

²⁵ <https://historicengland.org.uk/listing/the-list/list-entry/1187406>

²⁶ <https://barntheatre.org.uk/professional-theatre>

The former 1940s Nissen hut has been transformed into a state-of-the-art, air-conditioned auditorium for 200 people. Facilities include a studio rehearsal suite, dressing rooms, a green room, and an orchestra pit.

Figure 5.4 - Leisure Activities in Cirencester



- | | | |
|--------------------------|------------------------------------|--------------------------------|
| Bingham Hall Trust | Cirencester Rugby Football Club | Abbey Grounds Park |
| Corinium Museum | Cirencester Open Air Swimming Pool | Cirencester Park |
| edible by Aggy | Cotswold Leisure - Cirencester | City Bank Local Nature Reserve |
| New Brewery Arts | Cirencester Arena | City Bank Park |
| Cirencester Amphitheatre | Cirencester Town Football Club | St Michael's Park |
| Queen Anne's Monument | Cirencester Skatepark | Cirencester Obelisk |
| Barn Theatre | Cirencester Cricket Club | The Paddock Play Area |
| Sundial Theatre | | Four Acres Field |
| | | Cirencester Dance Club |
| | | Snap Fitness |
| | | Everyday Fitness Cirencester |

Source: Google My Maps, August 2021

- 5.32 Our analysis shows that Cirencester does not have a traditional cinema, with the closest being a Vue Cinema located in Stroud. In addition to this, Cirencester does not have a bowling alley, the closest again being located in Stroud. It is a similar story for escape rooms with the closest being located in Swindon.

6 Cirencester Town Centre - Residential

- 6.1 This section provides a high-level overview of the town centre residential market in Cirencester (see Figure 1.1 for the study area) in terms of sale values and rents for apartments.
- 6.2 We have specifically focussed on apartments as this is the most likely typology which would be developed within the town centre as opposed to residential houses.

Sales - Asking Values

- 6.3 There was found to be a lack of recent supply of new-build apartments within Cirencester town centre. The only recent residential development can be found at Stratton Court Village, located to the north west of the town centre, although this is exclusively a retirement village for over 65s and therefore does not form direct residential evidence.
- 6.4 Due to the lack of new build residential evidence, we have undertaken research into the second-hand market. Evidence has been found of numerous one, two and three bedroom apartments located within and around Cirencester Town Centre. The evidence is located within a variety of residential developments including Oakley Hall, a large gated heritage building that was redeveloped in 2009 and located just outside the town centre, and St Blaize Court, a slightly dated L-shaped development that benefits from courtyard parking and is located just to the south of the main pitch of the town centre.
- 6.5 Table 6.1 below outlines average price and floor areas from the market evidence found (17 units).

Table 6.1 - Prices of apartments on the market between April 2020 and March 2021

Beds	Baths	Avg sqm	Avg sqft	Avg Price	Avg £psm	Avg £psf
1	1	46.08	496	£152,492	£3,399	£316
2	1	65.22	702	£212,990	£3,253	£302
2	2	82.18	885	£285,000	£3,459	£321
3	1	115.00	1,238	£349,950	£3,043	£283
3	2	86.00	926	£280,000	£3,256	£302
Overall Avg		66.61	717	£220,580	£3,341	£310

Source: Rightmove/ Zoopla, August 2021

6.6 It is clear that sales values for the above schemes are in the order of £300 psf. It may be possible that well designed new schemes may attract a 'new build' premium over these values which will be driven by

- Location i.e., amenities in vicinity, proximity to transport and waterfront location
- Aspect and setting i.e., quality of shared space within a scheme
- Specification and finish
- Parking availability
- Security of tenure - lease length and associated annual costs
- Re-sale or letting potential.

Sales - Sold Values

6.7 Analysis has been undertaken of sold prices for new and second-hand apartments within Cirencester town centre using Rightmove and Land Registry, cross-referencing the addresses with their Energy Performance Certificate (EPC) to verify floor areas.

6.8 As above the research undertaken was not able to highlight any new-build apartments that had been sold within Cirencester town centre. This again highlights the lack of supply in the area and as above (5.5), adjustments would need to be made when comparing second hand comparables against new builds.

6.9 Research undertaken on Rightmove identifies 24 apartments sold within Cirencester over the period March 2019 – March 2021. Table 6.2 below summarises the data. The majority of the stock was found to be of a dated nature with generally basic internal specification. Due to the limited supply of evidence, it was difficult to identify whether there are any premiums for apartments that benefit from; greater specification, parking allocation, top floor vs ground floor etc.

Table 6.2 - Prices of apartments sold between March 2019 and March 2021

Beds	Baths	Avg sqm	Avg sqft	Avg Price	Avg £psm	Avg £psf
1	1	38.67	416.20	£140,000	£3,639	£338
2	1	61.61	663.20	£190,708	£3,135	£291
2	2	80.34	864.76	£234,000	£2,974	£276
3	1	-	-	-	-	-
3	2	95.00	1022.57	£297,500	£3,132	£291
Overall Avg		66.38	714.49	£203,250	£3,144	£292

Source: Rightmove, August 2021

- 6.10 Further evidence of 214 flat sales was found using the Land Registry database over the period of January 2018 – August 2021. Floor areas were verified using EPC's however the data does not highlight the number of bedrooms each flat has. Table 6.3 below summaries the sold house prices for the postcodes GL7 1 and GL7 2.

Table 6.3- Land Registry Achieved Values

Area	Count	Avg House Price	Avg sqm	Avg Price psm
GL7 1	154	£169,317	58	£2,965
GL7 2	60	£230,417	67	£3,405
Overall	214	£186,447	61	£3,089

Source: Land Registry, August 2021

- 6.11 The data gathered would suggest that the prices are higher in the GL7 2 postcode area (this includes the northern most part of the Town Centre as well as areas to the north). Nevertheless this information again suggests that values for new build apartments would be in excess of £3,000 psm.

Rental Values

6.12 For a broader overview, the Valuation Office Agency captures record monthly rents across administrative areas. Table 6.4 shows the data captured for the administrative area of Cotswold.

Table 6.4 - Monthly Rents (£) between April 2020 and March 2021

Type	Count	Mean	Lower Quartile	Median	Upper Quartile
Studio	10	536	525	550	550
One Bed	190	642	595	650	695
Two Bed	370	810	725	800	875
Three Bed	300	1,085	895	995	1,210
Four or more Beds	130	1,849	1,350	1,625	2,100
Sum/ Average	1,000	984	818	924	1,086

Source: Valuation Office Agency, August 2021

6.13 Looking more specifically at Cirencester, we note from Zoopla (August 2021) that there are just two flats available to rent at the time the research was undertaken. These include:

- 3-bed apartment, £950 pcm (£219 pw), first floor, modern & well appointed, unfurnished
- 1-bed apartment, £795 pcm (£183 pw), ground floor, basic specification, unfurnished

6.14 There are a further six apartments available surrounding the town centre. These include:

- 2 x 1-bed apartments both at £725 pcm (£167 pw).
- 4 x 2-bed apartments averaging £830 pcm (£192 pw) (range £775 pcm - £895 pcm)

Summary

6.15 The limited availability of rental accommodation within Cirencester Town Centre highlights an innate lack of supply within the town, and the town centre specifically.

6.16 Given that the Cirencester property market is relatively small in scale, there is limited evidence in terms of property listings and market transactions to provide an indication of supply and demand. It is often found in smaller markets that transactions are not reported to databases which creates an information failure and also many transactions which occur 'off market' without the involvement of agents. The research identified a complete lack of supply of new-build residential apartments across the town and within the town centre.

- 6.17 The market research identified that asking prices range between £152,000 for one-bedroom, one-bathroom apartments to £280,000 for three-bedroom, two-bathroom apartments. While sold prices reflect an average of £140,000 for one-bedroom, one-bathroom apartments up to £297,500 for three-bedroom, two-bathroom apartments.

7 Soft Market Testing

- 7.1 Cotswold Council is undertaking a partial update of its Local Plan, which will include an update of policies in relation to Cirencester Town Centre. Cirencester Town Council is also producing a Neighbourhood Development Plan, which will include policies for the town centre. The two councils are also working in partnership to produce a masterplan for the town centre. In order to inform the preparation of these documents, we have explored the likely market interest from leisure operators and investors. This next section summarises the soft market testing we have undertaken in relation to hotels, cinemas and restaurant requirements.
- 7.2 Appendix 1 of our report provides the soft market testing flyer we issued which includes the potential locations identified. AspinallVerdi have used their database of operators and also research in terms of regional/local operators that could consider Cirencester as a potential location.
- 7.3 The soft market testing explored interest in three specific areas, including the Brewery Car Park, the Forum and the Sheep Street Car Park. It was stressed that no decisions have been made with respect to the future of these car park sites.
- 7.4 It must be stressed that this exercise has been completed within a constrained timescale. A wider and more public exercise (i.e. wider national/regional advertising and marketing) could lead to more interest and response.
- 7.5 The Covid-19 pandemic will have a bearing on responses. Many businesses are in a state of recovery and therefore rebuilding and thus their plans for expansion and growth are uncertain. Therefore we would anticipate that as the economic recovery progresses it is likely that more interest could be secured.
- 7.6 From the exercise, three positive requirements came forwards, namely Everyman, Hilton and Tivoli Cinemas. We summarise their responses below.
- 7.7 The respondents were asked to provide an indication on the likely scale of requirement / development;
- Everyman stated that they would require between 10 – 12,000 sqft which would create 2-3 screens with a minimum ceiling height of 5 meters.
 - The Hilton stated that the size and market positioning of the hotel will need to be decided following independent feasibility advice obtained by the investor. However, a midscale hotel of circa 130 guestrooms would be appropriate which would require circa 1,400 sqm.
 - Tivoli Cinemas stated that they would require between 12 – 15,000 sqft with a minimum ceiling height of 5 meters.
- 7.8 The respondents were asked if they had a preference for one of the specific locations;

- Everyman stated that their initial preference would be for the Brewery Car Park although at this stage they would not dismiss the other two proposed sites.
- The Hilton stated that they did not have a preferred location although access to third party food and beverage providers would be preferred. This would suggest that a central location would be preferred and/or within a mixed-use development.
- Tivoli cinemas stated their preference would be the Brewery Car Park followed by Sheep Street and the Forum.

7.9 The interest above needs to be explored further to understand the conditions within which such operators could be secured. Aspects such as car parking, provision of food and beverage to complement the cinema and the financial/legal aspects would need to be carefully explored.

8 Conclusions

- 8.1 Within this chapter we briefly summarise the findings from the retail, leisure and residential market research.
- 8.2 Given that the Cirencester property market is relatively small in scale, there is limited evidence in terms of property listings and market transactions to provide an indication of supply and demand. This is a theme which we have identified throughout our analysis.

Retail Summary

- 8.3 A high-level review of the Cirencester retail market utilising Estates Gazette Radius Exchange and CoStar.
- 8.4 Retailing is focused on Cricklade Street, the town's historic retailing thoroughfare and still remains home to many of the multiples, whilst the Market Place offers the more boutique offering around the St John the Baptist Church. Dyer Street is an extension to Market Place offering the larger floor plates.
- 8.5 Our market research identified 12 retail units available, the rents ranging between £12.08 and £66.07 psf. On the demand side, we analysed leasehold and freehold transactions recorded on Estates Gazettes since 2018. We found 10 deals in total with rents per annum ranging between £6 and £42 psf.
- 8.6 The retail market in Cirencester appears to be performing well with only a small supply of retail units available to buy or let. In Section 5 it was identified that retailing turnover in the Cotswold totalled £82m in 2020 which suggests that tourism plays a big part in the performance of the retail market in Cirencester.

Leisure Summary

- 8.7 This section of our report considers the leisure market in Cirencester focussed on:
- Food and beverage
 - Hotels
 - Leisure

Food and Beverage

- 8.8 Our market research identified that there is a large supply of food and beverage operators in Cirencester, with no units currently available on either a freehold or leasehold basis. In terms of transactional evidence, we have identified four properties which have sold since 2016. One of which was a pizza restaurant with the other three being pubs. Given the decline in high street retailing and the nature of the Cirencester economy it is likely that further growth may occur in the F&B / leisure sector in the Town.

Hotels

- 8.9 COVID-19 has affected every sector across the globe, and the hotel industry is among the hardest hit. With the restrictions easing in May 2021, the industry is slowly recovering, however, research suggests that recovery to pre-COVID-19 levels could take until 2023 or later.
- 8.10 Our market research has identified that there is a large supply of independent B&Bs and Airbnb's in Cirencester with only two 'mainstream' hotels present, these being a Travel Lodge and Premier Inn. However, these two hotels are located on the outskirts of the town and therefore may not be as appealing to visitors as the other overnight accommodation offer within the town centre.
- 8.11 We are not aware of any existing proposals for new hotels in Cirencester at present. The viability of new hotels is determined by the trading potential of the scheme (i.e. a function of occupancy and room rates that can be generated). This is dependent upon the business model, location and competition in the vicinity. One of the key performance indicators within the hotel sector is occupancy, which is of course in addition to revenue potential. In order to generate operator demand, there must be tangible consumer demand (either business or tourism) which can be generated through bringing more people into Cirencester via new employment or leisure-led development. Soft market testing with operators could identify interest from hotel companies in terms of their interest in the Town.

Leisure

- 8.12 Our analysis of the current leisure offer shows that there is a broad range of activities in Cirencester mainly relating to outdoor and sports activities. Our analysis shows that Cirencester does not have a traditional cinema, with the closest being a Vue Cinema located in Stroud. In addition to this, Cirencester does not have a bowling alley, the closest again being located in Stroud. It is a similar story for escape rooms with the closest being located in Swindon.
- 8.13 A high-level review of the visitor economy in Cotswold District has been provided. Clearly the leisure offer in Cirencester plays a big part in this, along with the array of independent and Airbnb accommodation.

- 8.14 Any (re)development which occurs in the town should be focussed on maintaining and enhancing the leisure offer so that the tourism industry continues to thrive, particularly now that the UK has 'reopened' following the COVID-19 Pandemic.

Residential Summary

- 8.15 A high-level review of the Cirencester town centre apartment market utilising Land Registry, Rightmove and Zoopla has been undertaken.
- 8.16 Residential development within and around the town centre will be key to sustain future growth and help maintain the attractiveness of Cirencester as a residential location. Increased residential development will in turn increase the population density within the town, helping generate greater footfall and demand within the town centre for retail and leisure uses. It will enable the evening economy to become more sustainable and add vibrancy into the evening.
- 8.17 A further consideration would be the anticipated increase in demand for housing within Cirencester as the town would be considered an attractive commuter location as people continue to work from home more coming out of the Covid-19 pandemic. Cirencester is well located for commuters to Bristol, Oxford, Birmingham and even London and although demand levels are hard to track an increase would be expected.

Soft Market Testing

- 8.18 A soft market testing exercise has been undertaken within a constrained timeframe and this has brought forward potential interest from 3 operators; two cinema operators and one hotel operator. The site which appeared to be preferred is the Brewery site and this is likely to be due to the proximity to other complementary uses. At this stage, the Hilton did not a preferred choice of site.
- 8.19 From our experience securing a cinema operator will then attract other food and beverage operators and this can be a requirement from the cinema operator due to the combined experience that is offered to the public. Another option would be to deliver both a cinema and restaurant within a mixed used scheme along with other complementary uses (e.g. bar).
- 8.20 It is likely that a dedicated and wider marketing exercise could generate more interest. For instance, we would suggest that once a site has been selected then a marketing exercise which is widely advertised would attract interest from both developers and operators that could then work together with the Council to bring forward a successful scheme.
- 8.21 Financial viability could potentially be an issue and we have found that often hotel operators seek involvement from the Local Authority in terms of the scheme and this can come in the form of a lease which can then ensure that funding can be secured for such a development.

Appendix 1 - Soft Market Testing Brochure



Cirencester Town Centre Commercial Development Opportunities

Cotswold Council are reviewing policies in relation to Cirencester Town Centre and have commissioned Nexus Planning and AspinallVerdi to undertake research into the performance of the town centre. In order to inform this process we are exploring likely market interest from leisure operators and investors. In particular, hotels, cinema and restaurant requirements.

The following potential locations have been identified, although it must be stressed that no decisions have been made with respect to the future of these car park sites. Indeed the findings of the work being currently undertaken will help to inform future decisions.



We are interested in hearing from you if you have a particular requirement. It would be very helpful if you could send an email reply including the following information (as far as possible).

- 1) Is your interest as a developer or operator?
- 2) What specific use or uses do you see being of interest to you?
- 3) Can you provide an indication on the likely scale of requirement/development?
- 4) Do you have a preference for one of the specific locations above?

Deadline for responses is the 4th November.

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